

# *CSI DAILY NEWS*



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## **Russia Expands Sunflower Production into New Regions in 2026**

Russia's sunflower sowing area is expected to reach around 10.9 million hectares in 2026, according to estimates from the Ruseed analytical center. While this figure is slightly below the approximately 11.07 million hectares planted in 2025, it still remains above the levels recorded in earlier years.

The largest increases in sunflower planting are projected in several regions. Altai Krai is expected to lead with an additional 66,000 hectares, followed by the Lugansk People's Republic with 45,000 hectares. Other regions seeing notable growth include the Republic of Tatarstan (+20,000 hectares), Kurgan Oblast (+12,000 hectares), and Ulyanovsk Oblast (+10,000 hectares).

Analysts highlight that one of the key trends of the 2026 season is the expansion of sunflower cultivation into new agricultural zones, particularly in the Urals and Siberia. Between 2010 and 2025, sunflower sowing areas in these regions grew at an average annual rate of 16.5%, reflecting the crop's gradual geographic shift within Russia.<sup>6</sup>

## **Russia Keeps Wheat Export Duty at Zero for March 12–17**

Russia will keep the export duty on wheat at zero for the period March 12–17, according to the latest calculations based on updated indicative prices.

Export duties on barley and corn will also remain at zero, continuing the current trend.

The updated indicative export prices per ton are:

Wheat — \$231.5, up from \$229.8 previously.

Barley — \$230.8, slightly down from \$231.4.

Corn — \$218.6, compared with \$214.3 earlier.

Russia introduced flexible export duties on wheat, barley, and corn in 2021 as part of the grain damper mechanism, aimed at stabilizing domestic prices. The duty is calculated at 70% of the difference between the indicative price and the base price, with the indicative price determined using export contracts registered on the Moscow Exchange.<sup>6</sup>

## **Russia Ships Over 14,000 Tons of Soybeans to Belarus in Jan–Mar**

Russia exported 14,100 tons of food-grade soybeans from the Oryol and Kursk regions to Belarus between January 1 and March 3, 2026, under the supervision of the Rosselkhoznadzor.

Of the total volume, 4,200 tons were shipped from the Oryol Oblast, while 9,900 tons originated from the Kursk Oblast.

Compared with the same period in 2025, soybean exports to Belarus increased ninefold. During that period last year, shipments totaled just over 1,600 tons, including 52 tons from Oryol and 1,600 tons from Kursk.

Laboratory testing confirmed that no quarantine pests or harmful organisms were detected in the cargo. The exported soybeans fully complied with the phytosanitary requirements set by Belarusian authorities.<sup>6</sup>

## **Commodity Auctions: Results For 05.03.2026**

### **Purchase**

OOO Zakazchik No. 1

Wheat, grade 4, 12.5%, excluding VAT | 16,350 ₰/t | 600 t

OOO Trading House Sodruzhestvo

Rapeseed, incl. VAT | 39,500 ₰/t | 1,000 t

OOO Trading House Sodruzhestvo

Sunflower, incl. VAT | 41,500 ₰/t | 300 t

OOO Trading House Sodruzhestvo

Soybeans, grade 39, incl. VAT | 31,250 ₰/t | 1,100 t

OOO Trading House Sodruzhestvo

Soybean 40 Far East, incl. VAT | 25,000 ₰/t | 300 t

OOO Tambovsky Bacon

Corn, excluding VAT | 12,500 ₰/t | 500 t

OOO Tambovsky Bacon

Soybean Protein 37 ASV Rusagro, incl. VAT | 30,250 ₰/t | 300 t

OOO Zakazchik No. 1

Wheat, grade 4, 12.5%, excluding VAT | 16,100 ₰/t | 620 t

OOO OZK Trading

Wheat, grade 4, 12.5%, excluding VAT | 16,400 ₰/t | 600 tons

OOO OZK Trading

Wheat, grade 4, 12.5%, excluding VAT | 15,951 ₰/t | 1,200 tons <sup>7</sup>

## **Russia and China Plan Grain Terminal Project in Primorye**

Russia and China plan to sign an intergovernmental agreement to establish an international advanced development zone (IADZ) in Primorsky Krai, with a grain terminal to be built in Sukhodol Bay. The initiative will become the first project implemented under the new IADZ framework.

The law governing international advanced development zones came into force on January 1, 2026. The legislation introduces tax incentives and other benefits for companies operating within these zones, aiming to attract investment and promote cross-border economic cooperation.

The proposed grain terminal is expected to strengthen agricultural trade infrastructure and facilitate grain exports from Russia's Far East to Asian markets.<sup>4</sup>

## **Russia Updates Grain Trading Rules, Allows Shift from CFR to FCA Delivery**

A new version of the Rules for Organized Trading in Grains, Legumes, and Oilseeds on the spot market of National Mercantile Exchange (NTB) has entered into force on March 5, 2026.

The updated rules introduce several amendments to the contract terms used in exchange auctions, including provisions related to delivery conditions.

One of the key changes allows the buyer to unilaterally change the delivery terms from CFR to FCA under Incoterms 2020, with the contract value subsequently recalculated based on the new delivery conditions.

The revision is intended to provide greater flexibility in logistics and contract execution for participants trading grain, legumes, and oilseeds on the exchange's spot market.<sup>4</sup>

## **Iran Conflict May Disrupt Certain Food Supplies to Russia**

The ongoing tensions involving Iran could affect the availability of several imported products in Russia, prompting businesses to quickly adjust logistics and contracts rather than panic. Analysts note that the most vulnerable categories are greens and pistachios, while staple vegetables are less exposed.

In Russia's foreign trade structure, Iran plays a particularly significant role in the supply of certain vegetables. The country accounts for nearly 100% of winter-spring celery imports and holds a notable share in products such as iceberg lettuce, sweet pepper, and eggplant, supplying up to 40% of imports in some categories.

However, the risk level is lower for products like cucumbers, tomatoes, and potatoes, as imports from suppliers including Egypt, China, and Belarus already cover most of Russia's demand.

The conflict is also impacting the nuts and dried fruits market, particularly pistachios, as Iran is the world's second-largest producer and an important supplier to Russia. In the seafood sector, Iranian products play a smaller role, accounting for about 5% of trout imports and 12% of shrimp, making alternative sources relatively easy to find in countries such as India and Bangladesh, as well as within Russia.

The situation has been complicated by disruptions in shipping and communications with Iranian partners, largely due to risks around the Strait of Hormuz, which has led to higher freight and insurance costs. Iran has also temporarily restricted exports of several food and raw material products, increasing uncertainty for Russian importers.

In response, major retailers in Russia are diversifying supply chains, shifting contracts toward countries such as Turkey and Egypt to prevent shortages. Seafood importers are also increasing purchases of shrimp from India and Bangladesh, while trout supplies are being sourced from domestic producers in Murmansk and Karelia, as well as from Armenia.

For Russian exporters, the situation may create new opportunities. With Iran temporarily reducing exports to certain markets, Russian suppliers could expand sales of grain, vegetable oils, and processed foods in third countries. At the same time, shipments of Russian grain to Iran are facing temporary disruptions due to logistical risks in the region.

Experts suggest that Russia's foreign trade strategy for 2026–2027 will likely focus on expanding presence in Middle Eastern and Asian markets, while also mitigating risks linked to trade routes through Iran by using alternative ports, additional insurance mechanisms, and logistics hubs in partner countries.<sup>4</sup>

## **Soybean Oil Jumps 10% as Global Edible Oil Market Strengthens**

Global prices for vegetable oils are continuing to rise, reaching multi-month highs, according to data from the World Bank.

§ In February, the price of palm oil climbed 3.7% month-on-month, increasing from \$1,004.66 to \$1,041.6 per ton. This is the highest level since March 2024, when prices reached \$1,067.6 per ton.

Despite the recent increase, palm oil remains about 25% cheaper than sunflower oil, which continues to support strong demand from major buyers such as India. According to market data from OleoScope, sunflower oil prices (FOB Black Sea) for March delivery rose to \$1,327.50 per ton, up \$42 from \$1,285.00 per ton a month earlier, marking a 3.27% increase.

Other vegetable oils also posted significant gains during the same period:

- Soybean oil rose 10.1% month-on-month to \$1,270.47 per ton, compared with \$1,153.54 in January.
- Peanut oil increased 6.2%, reaching \$1,829.34 per ton, the highest level since July 2024.
- Coconut oil climbed 2.8% to \$2,259.13 per ton, supported by strong demand from the food, pharmaceutical, and cosmetics industries.

Analysts attribute the broad price increases to seasonal supply factors and stronger global demand, which have lifted prices across multiple segments of the edible oil market.

Rapeseed oil remains a separate case due to its growing role in biodiesel production. Around 15% of biodiesel feedstock is derived from rapeseed, meaning energy market dynamics are likely to continue influencing the price outlook for this product.<sup>5</sup>

## **Russian Wheat Exports Rise as Global Demand Remains Firm**

The global grain market is currently maintaining a fragile balance between ample reserves and strong demand, with export dynamics and geopolitical factors continuing to shape price trends.

According to preliminary estimates, wheat exports from Russia reached around 2.75 million tons in February 2026, compared with 2.07 million tons during the same period last year. Shipments are expected to accelerate further in March, potentially reaching about 3.6 million tons amid improving weather conditions and faster logistics.

At the same time, wheat prices (4th grade, 12.5% protein) at deep-water ports have increased. Prices for truck deliveries rose to 16,000 rubles per ton excluding VAT, up 300 rubles week-on-week, while rail deliveries reached 16,000–16,200 rubles per ton, an increase of about 100 rubles.

Despite large global wheat stocks, demand remains robust. According to the analytical portal Agence Ecofin, Nigeria, the largest wheat importer in West Africa, is expected to increase its wheat imports in the 2026/27 season by 7.46% to around 7 million tons, driven by rising consumption of processed wheat products such as bread, flour, and pasta.

Meanwhile, reports from Reuters indicate that Iran has resumed grain unloading operations at its Caspian Sea ports. However, shipments from the Russian port of Astrakhan are still being executed under previously signed contracts, according to market participants. Russia mainly exports barley and corn via the Caspian route, while food wheat shipments are typically handled through Black Sea ports. This season, Iran has become one of the top three importers of Russian grain, including wheat.

At the same time, Egypt currently holds around 4.5 million tons of wheat reserves, sufficient to cover approximately four months of domestic consumption, according to the Middle East News Agency. Egypt remains the largest wheat importer in the world, purchasing 10–12 million tons annually, including significant volumes from Russia.

Analysts warn that if tensions in the Middle East persist and disrupt shipments—particularly to markets such as Saudi Arabia—grain flows could be redirected or delayed. In such a scenario, additional supply could temporarily accumulate on the market, potentially putting downward pressure on prices.<sup>5</sup>

## **Ukrainian Feed Corn Prices Rise on Strong Demand**

Prices in the feed corn market in Ukraine increased this week, according to analysts from APK-Inform.

The upward trend is supported by active demand from both domestic processors and export-oriented companies, while the supply of grain from farmers remains relatively limited. Price growth is also influenced by similar developments on the export market.

As of March 6, bid prices for feed corn are most often reported in the range of 8,900–9,600 UAH per ton. In the southern regions, prices reach about 10,300 UAH per ton CPT, which is 100 UAH per ton higher than at the beginning of the week.<sup>2</sup>

## **Ukraine barley prices may rise amid global supply concerns**

The barley market in Ukraine remains relatively stable, but the supply of grain is gradually declining, which could lead to higher prices in the coming weeks. This assessment was reported by analysts from the PUSK agricultural cooperative established within the Ukrainian Agrarian Council, according to the UAC press service.

Indicative prices for barley on the domestic market are currently estimated at around 10,800–11,000 UAH per ton.

According to analysts, grain supply has decreased noticeably in recent weeks as many farmers have suspended sales not only of barley but also of wheat and rapeseed. The main reason is uncertainty surrounding the new harvest and the condition of crops after winter. Until clearer information becomes available about the overwintering of crops, producers are reluctant to sign new sales agreements.

At the same time, external demand for Ukrainian barley is gradually strengthening while supply remains limited.

Market participants note that a certain shortage of barley is already being felt on the global market, with demand for Ukrainian grain continuing, particularly from Turkey. Additional support for prices may come from crop concerns in other producing countries. France is facing problems due to excessive moisture, while Romania has reported partial crop losses. Weather-related risks also persist across the Black Sea region.

Demand from China may also support the market. The calculated price for deliveries of Ukrainian barley to China currently stands at about \$205–208 per ton CPT port, while recent buyer inquiries have been around \$202–205 per ton. Analysts say these indications may signal the formation of more stable demand from Chinese importers.

According to PUSK experts, March and the first half of April could become a period when an upward price trend begins to form in the barley market if external demand remains strong and farmers continue to limit sales.<sup>2</sup>

## **EU mustard seed imports rise as Ukrainian supplies decline**

The European Union has increased imports of mustard seeds in the 2025/26 marketing year, while supplies from Ukraine have declined significantly, according to data reported by Mundus Agri.

Figures from the European Commission show that between July 1, 2025 and February 22, 2026, EU countries imported 61.5 thousand tons of mustard seeds, which is 23.3% higher than in the

same period of the previous season. At the same time, the total value of imports reached €36.07 million, down 4.4% year-on-year, while the average price fell by 22.4% to €0.59 per kilogram.

Canada remains the largest supplier of mustard seeds to the EU, with shipments rising by 8.1% to 16.3 thousand tons. Imports from Russia also increased significantly, growing by 53.4% to 12.3 thousand tons. In contrast, exports from Ukraine declined by 41.6% to 10.7 thousand tons.

Kazakhstan also strengthened its position on the European market, with exports more than doubling to 14.4 thousand tons. Prices for Kazakh white mustard seeds (*Sinapis alba*) with 99% purity are currently estimated at around €700 per ton on DDP Poland terms.

Among EU member states, Poland remains the largest importer of mustard seeds, increasing purchases by 56.2% to 19.7 thousand tons. Imports in Belgium rose sharply by 148.3% to 17.5 thousand tons, while Germany reduced purchases by 24.8% to 12.3 thousand tons.<sup>1</sup>

## **Tunisia launches tender to purchase 175,000 tons of wheat**

The Tunisian Grain Agency has announced a tender for the purchase of wheat, scheduled to take place on March 6.

According to the tender terms, Tunisia plans to purchase 125,000 tons of soft wheat for delivery in April–May 2026, as well as 50,000 tons of durum wheat for delivery in April 2026.

The tender is being conducted by the Office des Céréales of Tunisia, which regularly imports wheat to meet domestic consumption needs.<sup>3</sup>

## **Nigeria set to increase wheat imports in 2025/26 season**

Nigeria is expected to increase wheat imports in the 2025/26 season as domestic demand for wheat-based products continues to grow.

According to forecasts, wheat purchases from foreign markets could reach about 6.7 million tons in the current season, which would represent an increase of around 8% compared with the previous year.

Demand is projected to remain strong in the 2026/27 season as well. Import volumes may rise further to about 7.2 million tons, supported by a relative stabilization of the national currency and improving consumer purchasing power.

Russia remains one of the major wheat suppliers to Nigeria. At the end of the 2024/25 season, Nigeria imported more than 1.5 million tons of wheat from Russia.<sup>9</sup>

## Canada forecasts lower wheat and pulse acreage in 2026 sowing season

Crop planting patterns in Canada are expected to shift in the upcoming sowing season, with larger areas planned for canola, barley, soybeans and corn, while wheat and several pulse crops are projected to decline. The outlook is based on a farmer survey published by Statistics Canada on March 5 and reported by The Western Producer.

According to the survey, the area planted with wheat could decrease by 1.1% from 2025 levels to about 26.7 million acres (10.81 million hectares). The decline is largely linked to a 6.7% reduction in winter wheat sowings in the fall of 2025, while spring wheat acreage is expected to remain close to last year's level.

Canola acreage is forecast to rise by about 1% to 21.8 million acres (8.82 million hectares). Since the survey was conducted before China lifted tariffs on Canadian canola, analysts expect the final planted area could exceed 22 million acres (8.9 million hectares).

Soybean plantings are projected to increase by 2.9% to 5.9 million acres (2.39 million hectares), with the largest growth expected in Manitoba, where acreage could expand by 12.9%.

Barley plantings are expected to grow by 5% year-on-year to 6.4 million acres (2.59 million hectares), while oat acreage is forecast to decline by 3.1% to 2.9 million acres (1.17 million hectares).

Corn area is projected to rise slightly by 1.47% to about 3.8 million acres (1.58 million hectares), with the largest increase anticipated in Ontario, where plantings could grow by 5.4%.

Most pulse crops are expected to see reduced acreage. Lentil plantings may fall by 5.5% to 4.1 million acres (1.66 million hectares), while pea acreage could drop by 12.3% to 3.1 million acres (1.25 million hectares). Other pulses are forecast to decline by 30.7% to 295,000 acres (119,380 hectares). Chickpeas are the only pulse crop expected to expand, with acreage projected to increase by 6.3% to 575,000 acres (232,690 hectares).<sup>1</sup>

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