

# CSI DAILY NEWS

19.03.2026



## Russian agri exports to Turkey rise 9% in value in 2025

Russian agricultural exports to Turkey increased by 9% in value terms in 2025, reaching more than 12 million tonnes worth a total of \$3.8 billion, according to market estimates.

Wheat and sunflower oil remained the dominant export categories, continuing to account for the bulk of Russian agri shipments to the Turkish market.

In value terms, wheat ranked first among Russian agricultural exports to Turkey at around \$1.2 billion, followed by sunflower oil at more than \$1.1 billion.

Other key export categories included bran at nearly \$322 million, legumes at \$296 million, and pulp and meal at \$178 million.

Several product groups posted particularly strong growth during the year. Rice exports rose sharply from just \$16,000 in 2024 to \$8.8 million in 2025, driven mainly by shipments of husked rice.

Flaxseed exports increased 14-fold, while molasses shipments grew 2.9 times and barley exports expanded 2.7 times year-on-year.

At the same time, exports of a range of other agricultural products also recorded growth, reflecting a broader recovery in bilateral agri trade.

For historical comparison, the peak value of Russian agricultural exports to Turkey was recorded in 2022, when shipments exceeded \$5 billion. Although 2025 results remain below that level, the latest figures point to a steady recovery and continued strengthening of trade ties between the two countries.

Stronger “channel-style” version (better for your feed):

Russian agri exports to Turkey rise 9% in 2025

Russia exported more than 12 mln tonnes of agricultural products to Turkey in 2025 worth \$3.8 bln, up 9% year-on-year in value terms.

Wheat (\$1.2 bln) and sunflower oil (\$1.1+ bln) remained the core export drivers, followed by bran (\$322 mln), legumes (\$296 mln), and pulp and meal (\$178 mln).

The fastest growth was seen in smaller categories: rice jumped from just \$16,000 in 2024 to \$8.8 mln in 2025, flaxseed exports rose 14-fold, molasses increased 2.9 times, and barley 2.7 times.

Although still below the 2022 peak of more than \$5 bln, the 2025 result confirms a steady recovery in Russia-Turkey agricultural trade. <sup>7</sup>

## **Russian agri exports to Uzbekistan exceed \$1.2 bln in 2025**

Russian exports of agricultural products to Uzbekistan exceeded \$1.2 billion in 2025, up 19% compared with 2024, while shipment volumes increased by 17% to more than 1.15 million tonnes, according to market estimates.

Sugar and raw sugar remained the largest export category in the supply structure. Shipments to Uzbekistan rose by 51% year-on-year to more than \$255 million in 2025. Uzbekistan was the largest buyer of Russian raw sugar and the second-largest importer of Russian sugar overall.

Chocolate confectionery ranked second among the main export categories. In 2025, Russian producers supplied Uzbekistan with \$107 million worth of chocolate products, 12% more than a year earlier. As a result, Uzbekistan entered the top three foreign buyers of Russian chocolate.

Other products in the top five export categories included soybean meal and cake at \$74 million, sunflower oil at \$66 million, and margarine at \$52 million.

According to Agroexport head Ilya Ilyushin, bilateral trade in agricultural products between Russia and Uzbekistan has been expanding steadily and has tripled between 2018 and 2025.

He noted that significant growth potential remains, particularly in sugar products, fish and seafood, poultry meat, processed meat products, beverages, baby food, as well as fertilizers, agricultural seeds, veterinary medicines, and vaccines.<sup>4</sup>

## **Russian vegetable oil production rises 50% since 2019, driven by exports**

The Eurasian Economic Commission (EEC) on March 19 held a roundtable on the state and prospects of the oil and fat industry in the Eurasian Economic Union (EAEU), focusing on market conditions, balanced development, domestic and external supply potential, and support measures for the sector.

The event brought together industry participants, including Agroexport head Ilya Ilyushin.

Speaking at the roundtable, Ilyushin said Russian vegetable oil production increased by 50% between 2019 and 2024, reaching 10 million tonnes, while exports remained the main driver of growth in the oil and fat industry.

He noted that over the past five years, the average annual growth rate of exports matched the pace of growth in vegetable oil production. As a result, around 70% of Russia's vegetable oil output and 26% of oilcake production are now directed to export markets.

Russian exports of oil and fat products to EAEU member states have also expanded rapidly. Over the past five years, shipments to the union more than doubled and exceeded \$1 billion last year, with sunflower oil accounting for the largest share of supplies.

Ilyushin also emphasized the strategic importance of the EAEU market, noting that Russia exports not only unrefined oils, but also bottled branded oil and higher value-added processed products, including sauces and seasonings.

Against the backdrop of expanding oilseed production and processing capacity across EAEU countries, he called for stronger coordination within the union and a more unified positioning of EAEU oil and fat products in external markets.<sup>4</sup>

## **Several Russian regions prepare for possible locust outbreaks**

Several Russian regions are preparing for a possible locust outbreak this season amid growing concerns over rising pest populations.

The regions considered at risk include Volgograd and Saratov, as well as Dagestan, Chechnya, and Khakassia.

According to preliminary assessments, wintering locust reserves were identified in a number of territories last year. A spring monitoring survey will determine how successfully the insects survived the winter and clarify the scale of the threat for the new season.

At the same time, specialists note an overall trend toward increasing locust numbers.

The risk of a larger locust population is considered especially high if spring and summer weather conditions turn dry and hot, which could create a more favorable environment for rapid pest development.

Agricultural producers are already factoring this risk into their crop protection plans and preparing preventive pest-control measures.<sup>6</sup>

## **FESCO signs logistics agreement with Resurs for grain product exports to Asia**

FESCO Transport Group and Russian cereal producer Resurs have signed a cooperation agreement to develop export shipments of cereals and other products under the Uvelka brand to Asian markets via Vladivostok.

According to FESCO, the agreement was signed during the TransRussia international exhibition by Alexey Kravchenko, Commercial Director of FESCO Integrated Transport (FIT), and Denis Okhtemenko, Logistics Director of Resurs.

Under the partnership, the companies plan to use FESCO's logistics infrastructure to organize long-term export supplies of Uvelka products from the Chelyabinsk region to countries in South and Southeast Asia.

The main route will involve regular FESCO Chelyabinsk Shuttle East container trains operating from Formachevo station to Vladivostok, followed by onward delivery through FESCO's own maritime services to Asian destinations.

In addition to the rail-sea corridor via Vladivostok, the parties will also consider the possibility of organizing container shipments through land border crossings as part of future export development.<sup>5</sup>

## **Russian exporters face growing legal uncertainty over multimodal grain shipments**

Russian agricultural exporters are increasingly facing multimillion-ruble additional customs duty charges and penalties following inspections of multimodal export shipments, amid disputes over how shipment documentation is being interpreted.

According to market participants, customs claims are mainly focused on two issues. The first is the absence of a sea bill of lading at the time an export declaration is filed. The second, and more contentious, issue is the treatment of several separate cargo batches as a single shipment when they are covered by one contract and a common invoice, but physically shipped at different times.

The lack of a unified legal approach has become a major source of uncertainty for exporters. At present, at least 16 unresolved arbitration disputes involving exporters from different regions and customs authorities can be found in the court registry, according to Vedomosti.

These cases concern whether cargoes shipped at different times may still be considered a single consignment if they are executed under one contract and one invoice.

Judicial practice remains inconsistent. Courts have ruled in favor of both exporters and customs authorities, and no stable legal position has yet been formed on the issue.

According to legal experts cited by the publication, the current balance of court victories is roughly split 50/50 between the two sides.

At the same time, there are also regional cases in which higher customs bodies have overturned additional charge decisions issued by lower-level authorities, including examples involving the Siberian Customs Administration.

The situation is increasing legal and financial risks for grain exporters, particularly in multimodal supply chains, where documentation standards and the interpretation of shipment structure remain under close scrutiny.<sup>5</sup>

## **Russia increases sunflower oil exports by 51% in value in Jan-Feb**

Russia significantly increased sunflower oil exports in the first two months of 2026, with overseas shipments reaching around 622,000 tonnes worth \$805 million.

Compared with the same period last year, export volumes rose by 26%, while export revenue increased by 51%, reflecting both higher shipments and stronger prices.

India remained the largest buyer of Russian sunflower oil in January-February, importing products worth more than \$397 million.

Turkey ranked second with purchases of around \$233 million, followed by China at about \$50 million, Egypt at approximately \$41 million, and Saudi Arabia at more than \$16 million.

The latest figures confirm continued strong demand for Russian sunflower oil in key Asian and Middle Eastern markets, with India and Turkey accounting for the overwhelming majority of export revenue in the period.<sup>5</sup>

## **Russia's 2026 wheat crop outlook improved on favorable weather, SovEcon says**

SovEcon has raised its forecast for Russia's 2026 wheat harvest by 1.7 million tonnes to 87.6 million tonnes, citing generally favorable weather conditions and an improved outlook for winter crops.

According to analysts, the revision reflects an increase in winter wheat area, better yield expectations, and overall favorable soil moisture reserves across many growing regions.

At the same time, moisture conditions remain uneven. In the Rostov region, one of Russia's key wheat-producing areas, soil moisture reserves are still below average levels.

SovEcon now estimates Russia's winter wheat harvest at 64.6 million tonnes, up from 62.9 million tonnes projected a month earlier.

The forecast for spring wheat was left unchanged at 23 million tonnes.

Despite the upward revision, the firm said it is still too early for more optimistic assessments, as the main weather-related risks for the crop will fall in April and May.<sup>3</sup>

## **Ukrainian traders step up forward purchases of 2026 wheat crop**

Ukrainian traders are actively signing forward contracts for the supply of new-crop wheat, according to APK-Inform.

The pace of forward sales is being supported by relatively high bid prices, which remain attractive for Ukrainian farmers as they are only slightly below current levels for old-crop grain.

As of March 19, bid prices for 2026-crop wheat in Ukraine's deep-water ports were mostly quoted at \$211–223 per tonne CPT for grade 2 wheat and \$210–221 per tonne CPT for grade 3 wheat.

The quoted levels apply to July-August delivery and reflect growing interest from traders in securing early supplies of the new harvest.

The narrow discount to old-crop wheat is helping stimulate producer interest in forward contracting, as farmers take advantage of favorable price indications ahead of the 2026 harvest.<sup>2</sup>

## **Kazakhstan expands Aktau port capacity with Chinese-backed logistics projects**

Kazakhstan is implementing two logistics projects worth a combined 30.7 billion tenge in the Aktau Seaport Special Economic Zone, with the participation of Chinese partners, according to the Association of Kazakh Freight Rail Carriers.

The first phase of a new container hub, valued at 20.7 billion tenge, is scheduled to be launched by the end of the year. Once operational, it will increase Aktau port's annual container handling capacity from 70,000 TEU to 140,000 TEU.

At the same time, the Aktau Eurasian Supply Chain Base project, worth 10 billion tenge, is also expected to be commissioned. The facility will provide storage capacity for up to 5,000 containers.

According to the association, the projects will strengthen Kazakhstan's position within the Trans-Caspian International Transport Route and enhance the role of Aktau as a key logistics hub on the China-Europe corridor.<sup>2</sup>

## **Kyrgyzstan opens corn exports to China under phytosanitary protocol**

Kyrgyzstan has begun exporting corn to China for the first time, marking a new step in the development of bilateral agricultural trade.

According to the Ministry of Water Resources, Agriculture and Processing Industry of Kyrgyzstan, the first shipment was dispatched on March 16 and totaled 25 tonnes. The exporter was the Ziyabidin Ata farming enterprise.

The launch of exports became possible under the phytosanitary protocol for corn signed on September 15, 2022, between the Kyrgyz ministry and the General Administration of Customs of China.

At present, two Kyrgyz enterprises have received approval to export corn to the Chinese market.

The move comes as Kyrgyzstan continues to expand production of feed crops amid growth in the domestic livestock sector. As previously reported, sowing areas under barley and corn have been increasing in response to stronger feed demand.

According to final data from the National Statistics Committee, Kyrgyzstan reduced total production of grains and pulses in 2025, but corn for grain was an exception. The corn harvest increased by 5% year-on-year to 846,000 tonnes, while average yield rose by 3% to 74.5 centners per hectare.<sup>2</sup>

## **Kazakhstan resumes grain exports to Iran after two-week pause**

Kazakhstan has resumed grain exports to Iran after an almost two-week interruption, according to the State Food Corporation and the Ministry of Agriculture.

The national grain operator said shipments to the Iranian market are being handled through its subsidiary Ak Biday-Terminal in Aktau. Since the beginning of 2026, the terminal has already transshipped 31,000 tonnes of Kazakh grain to Iran.

The State Food Corporation said it continues to monitor demand from Iranian buyers and remains ready to sign new contracts if additional interest emerges.

Overall, Kazakhstan exported 8.9 million tonnes of new-crop grain between September 1, 2025 and March 18, 2026.

Uzbekistan remains the main export destination, with shipments rising 14% year-on-year to 7.5 million tonnes. Exports to Kyrgyzstan increased 1.8 times to 354,000 tonnes, deliveries to

Afghanistan rose 24% to 1.3 million tonnes, and supplies to Turkmenistan grew 1.5 times to 145,000 tonnes.

Earlier, the Ministry of Agriculture reported that Kazakhstan harvested a record grain crop of 27.1 million tonnes in 2025, including 20.3 million tonnes of wheat. The country's export potential for the current season is estimated at around 13 million tonnes.

Iran remains one of the traditional buyers of Kazakh grain, including wheat, barley, and corn. In 2025, Kazakhstan supplied about 1 million tonnes of wheat to the Iranian market.<sup>1</sup>

## **Black Sea wheat remains among cheapest offers as global prices edge higher**

Global wheat prices moved higher this week, with Chicago futures rising nearly 3% amid drought concerns in parts of the U.S. wheat belt. However, the market remains broadly weighed down by ample global supply, keeping overall sentiment cautious.

Despite the comfortable supply outlook, investor interest in agricultural commodities is increasing. According to Euronext data, financial funds expanded their net long positions last week, suggesting stronger demand for grain contracts as a hedge against inflation.

Competition in the export market is also intensifying among major suppliers. Elevated U.S. wheat prices are creating opportunities for alternative origins, particularly from Europe and the Black Sea region.

In this context, traders reported that two cargoes of Polish milling wheat were sold to a U.S. buyer for shipment in August and October, an unusual destination for Polish exports.

At the same time, Russian wheat continues to compete aggressively in international tenders and spot markets. Market participants are discussing possible Russian sales to Mexico, where it is reportedly competing with Argentine wheat among the lowest-priced offers.

Black Sea wheat remains among the most competitive origins on price. Russian, Ukrainian, and Argentine 11.5% protein wheat for April shipment is currently quoted at around \$231–234 per tonne FOB.

Romanian wheat is offered slightly higher at \$235–237 per tonne FOB, while French wheat is quoted at \$239–241 per tonne FOB.

Accelerating export shipments from Russia are further intensifying competition in a global wheat market that remains well supplied, even as weather concerns in the United States provide short-term support to prices.<sup>1</sup>

## **EU-UK grain harvest outlook revised higher, but still below 2025**

COCERAL has raised its forecast for grain production in the European Union and the United Kingdom in 2026 to 298.8 million tonnes, up from its previous estimate of 296.7 million tonnes issued in December.

Despite the upward revision, the projected harvest would still be 3.8% below the 2025 result.

Soft wheat production is now forecast at 142.6 million tonnes, down 4.1% from the previous year, while barley output is estimated at 59.3 million tonnes, a decline of 6.8%.

Corn production is expected to recover from last year's drought-affected levels. However, the upside may be limited by a potential reduction in planted area, as some farmers are expected to shift acreage toward alternative crops such as sunflower and soybeans.<sup>6</sup>

## **Romania strengthens oilseed export role in Black Sea as rapeseed and sunflower demand supports 2026 acreage growth**

Romania is strengthening its role as one of the key oilseed producers and exporters in the Black Sea region, even as Bulgaria continues to debate possible import restrictions.

Strong demand from European processors for rapeseed, as well as rapeseed oil and rapeseed meal, is supporting Romanian farmers' decisions to expand oilseed acreage in 2026.

Early spring weather conditions are generally favorable for crop development, although recent temperature fluctuations still leave some production risks in place.

Despite these uncertainties, Romania's oilseed sector continues to benefit from stable export demand and strong integration into European Union supply chains.

Sunflower also remains an attractive crop for Romanian farmers, supported by elevated prices. Robust export activity further confirms Romania's growing importance as a reliable supplier of oilseeds to European processors.<sup>1</sup>

## **Argentina's February soybean meal exports fall 33% month-on-month**

Argentina's soybean meal exports fell sharply in February, according to Oil World (Germany), totaling 1.33 million tonnes. This was down 33% from January's 2.01 million tonnes and 27% below the 1.82 million tonnes shipped in February 2025.

The decline was mainly driven by weaker shipments to the European Union and Asian markets. Exports to the EU dropped to 0.27 million tonnes, compared with 0.46 million tonnes in January and 0.34 million tonnes in February last year. Shipments to Asian destinations also fell to 0.58 million tonnes, down from 1 million tonnes a month earlier and 0.84 million tonnes a year ago.

At the same time, exports to Indonesia and Turkey showed growth, partially offsetting the broader slowdown.

Since the beginning of the 2025/26 marketing year, Argentina has exported 10.87 million tonnes of soybean meal, compared with 11.78 million tonnes during the same October–February period of the previous season.<sup>1</sup>

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