

# *CSI DAILY NEWS*

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*07.04.2026*





## **Russia's Spring Sowing Advances in 25 Regions, Running Ahead of Last Year**

Spring sowing in Russia is underway in 25 regions, with planting progress running ahead of last year, according to the Russian Ministry of Agriculture.

As of the latest update, 1.8 million hectares have been sown, up by 76.7 thousand hectares compared with the same period in 2025.

Cereal and legume crops account for 1.2 million hectares of the planted area so far, while farmers are also continuing sowing of sugar beets and spring rapeseed, alongside potato planting and open-field vegetable cultivation.

The Agriculture Ministry expects the total area under winter and spring crops in 2026 to increase by 1 million hectares to 83 million hectares. Larger sowing areas are planned for several crops, including grains, buckwheat, soybeans and rapeseed.<sup>3</sup>

## **Aston Posts First Annual Loss in 11 Years as 2025 Revenue Falls 28%**

Russian grain trader and vegetable oil exporter Aston posted its first annual loss in 11 years in 2025, reporting a net loss of 8.7 billion rubles under Russian accounting standards (RAS), compared with a profit of 14.1 billion rubles in 2024.

According to the company's financial statements, the result marks the worst financial performance in Aston's history since its founding in 2002. The company had previously reported a loss only once in recent years — a 119.3 million ruble loss in 2014.

Aston's revenue declined by 27.7% year-on-year to 178.5 billion rubles in 2025. Revenue from sales of purchased goods dropped by half to 138.9 billion rubles, while revenue from sales of the company's own products rose 18.2% to 39.2 billion rubles. Revenue from other services increased 25.3% to 322.3 million rubles.

At the same time, the company reduced both payables and receivables. Accounts payable fell from 5.9 billion rubles at the end of 2024 to 4.9 billion rubles at the end of 2025, while accounts receivable declined from 55 billion rubles to 35.6 billion rubles.<sup>3</sup>

## **Azov Sea Ship Attacked by Drone Carried 3,000 Tons of Wheat**

A dry cargo vessel damaged in a Ukrainian drone attack in the Azov Sea earlier this month was carrying around 3,000 tons of wheat, according to a crew member cited by TASS.

The cargo was reportedly being transported to a storage facility for unloading. The crew member said the wheat itself did not appear to catch fire, while the vessel's superstructure was destroyed in the blaze.

"As far as I know, there were about 3 thousand tons of wheat. I didn't see the cargo catch fire. I only saw our superstructure burn down, along with all our belongings and documents," the sailor said.

The vessel was struck by a Ukrainian drone on April 3 off the coast of the Kherson region, according to regional governor Vladimir Saldo. The ship caught fire in the Azov Sea, and the crew was later forced to abandon the vessel.

Saldo said the sailors reached the shore in the Kherson region but only made contact on April 5. Nine crew members, all Russian citizens, were later found on shore.

Initial reports suggested the ship had sunk, but authorities later located the burned-out hull and towed it to Krasnodar Krai.<sup>3</sup>

## **Commodity Auctions: Results for 07.04.2026**

### **Purchase**

OOO Zakazchik No. 1

Wheat, grade 4, 12.5%, excluding VAT | 16,875 P/t | 600 t

OOO Trading House Sodruzhestvo

Sunflower, incl. VAT | 42,500 P/t | 500 t

OOO Trading House Sodruzhestvo

Soybeans, grade 39, incl. VAT | 33,500 P/t | 1,000 t

OOO Zakazchik No. 1

Wheat, grade 4, 12.5%, excluding VAT | 16,585 P/t | 620 tons

OOO "OZK Trading"

Wheat, grade 4, 12.5%, excluding VAT | 17,100 P/t | 75 tons



OOO "OZK Trading"

Wheat, grade 4, 12.5%, excluding VAT | 16,450 P/t | 90 tons <sup>5</sup>

## **Wheat Futures Weaken as Russian Export Prices Slip, April Exports Seen at 3.7 Mln Tons**

Global wheat futures softened in the second half of last week and at the start of this week, while Russian export prices also moved lower, according to the latest grain market review from the Analytical Center of Rusagrotrans covering March 31 to April 7, 2026.

Russian 12.5% protein wheat for April delivery fell to \$238 per ton FOB. U.S. wheat prices declined by \$2 to \$256 per ton, while French wheat also dropped \$2 to \$237 per ton. Romanian wheat was the exception, rising by \$1 to \$242 per ton FOB.

Recent import tenders in the Middle East and North Africa also reflected softer pricing. Tunisia purchased 100,000 tons of wheat for shipment between May 5 and June 10 at a price equivalent to around \$233-234 per ton FOB Novorossiysk. Jordan also bought 60,000 tons for delivery in the second half of July at about \$233 per ton FOB Novorossiysk equivalent.

On the domestic market, purchase prices for fourth-class wheat with 12.5% protein in Russia's deep-water ports continued to decline, pressured by lower FOB values and a stronger ruble. Truck-delivered wheat prices fell by 150 rubles to 16,500-16,600 rubles per ton excluding VAT, while rail-delivered prices eased by 100 rubles to 16,400-16,500 rubles per ton.

Weather conditions in southern Russia are expected to improve in the near term, with heavy rainfall forecast over the next two weeks likely to benefit winter crop development. Although temperatures are expected to decline, they are forecast to remain above zero and should not pose a threat to crops.

Despite weaker price dynamics, Rusagrotrans estimates Russia's wheat exports in April 2026 at 3.7 million tons, above both April 2025 levels of 2.39 million tons and the five-year average of 3 million tons.<sup>8</sup>

## **Russia Plans Mandatory Exchange Sales Quotas for Grain, Oilseeds and Fertilizers from 2027**

Russia is preparing to introduce mandatory exchange sales quotas for a range of agricultural and commodity products from 2027, following the registration of a naker of related draft laws in the State Duma.

Under the first bill, the government would be granted the authority to require large producers to sell up to 25% of their total output through exchange trading. The proposed list of products includes frozen fish and crustaceans, wheat, meslin, rye, barley, corn, soybeans, sunflower, rapeseed, sugar beet, sunflower oil, white sugar, sunflower and soybean meal, as well as ammonia and urea. Small businesses would be exempt from the requirement.

A second draft law sets out penalties for failure to comply with the mandatory sales quotas. Fines would range from 30,000 to 50,000 rubles for officials and from 300,000 to 500,000 rubles for legal entities.

The legislation is expected to take effect on September 1, 2026, while the actual exchange sales quotas are planned to be introduced starting in 2027.<sup>3</sup>

## **Drewry Container Index Holds at \$2,287/FEU as Freight Rates Pause After Recent Gains**

Global container freight rates showed signs of short-term stabilization last week, with the Drewry World Container Index holding steady at \$2,287 per 40-foot container (FEU), unchanged from the previous week.

The flat reading suggests that rate growth on key global routes may be pausing temporarily after rising in recent weeks. However, according to Drewry, this stabilization is likely to be short-lived.

The consultancy noted that higher fuel prices and continued logistical tensions across global supply chains are creating conditions for a renewed increase in container shipping rates in the near term.<sup>7</sup>

## **Ukrainian Port Feed Barley Prices Reach \$224/T CPT Port**

Ukraine's feed barley market posted a slight price increase over the past week, supported by tighter supply and steady demand despite still subdued trading activity.

Market participants reported that both trading and procurement remained relatively slow, although activity picked up modestly as preparations for the new season intensified. Prices were underpinned by limited grain availability, active interest from some buyers and ongoing logistical constraints.

Bid prices for feed barley were reported in the range of 9,100-10,500 UAH per ton CPT. In Ukrainian ports, prices for feed barley were quoted at \$218-224 per ton CPT port.<sup>2</sup>

## **Ukraine Wheat Prices Hold Steady as Farmers Limit Sales and Processors Stay Active**

Ukraine's wheat market remained broadly stable over the past week, with no major price changes reported despite continued active demand from processors.

Most processors remained engaged in the market, but in the majority of cases purchase prices were left unchanged. Only a limited number of buyers were willing to raise bids in an effort to secure larger grain volumes.

Farmer selling activity also remained restrained, with producers continuing to offer wheat in small lots as they held back from sales in anticipation of further price gains. At the same time, volatility in the export market continued to influence pricing sentiment on the domestic market.

Bid prices for second-class milling wheat were reported in the range of 9,700-11,000 UAH per ton CPT, while feed wheat was quoted at 9,000-10,500 UAH per ton CPT.

In Ukrainian ports, food wheat prices were recorded at \$216-224 per ton CPT port, while feed wheat traded at \$216-219 per ton CPT port.<sup>2</sup>

## **Ukraine's Grain Exports Reach 26.34 Mln Tons in 2025/26, Well Below Last Year**

Ukraine has exported 26.339 million tons of grain and pulses since the start of the 2025/26 marketing year as of April 6, including 281,000 tons shipped in April, according to the Ministry of Agrarian Policy, citing operational data from the State Customs Service.

The current pace remains significantly below last season. As of April 11, 2025, Ukraine had exported 38.823 million tons of grain and pulses, including 999,000 tons shipped during April.

Since the beginning of the 2025/26 season, wheat exports have totaled 10.054 million tons, including 37,000 tons in April. Barley exports reached 1.404 million tons, while rye shipments stood at just 200 tons. Corn exports amounted to 14.501 million tons, of which 244,000 tons were shipped in April.

Flour exports since the start of the season were estimated at 50,600 tons as of April 6, including 700 tons exported in April. Wheat flour accounted for 49,200 tons of the total, with 700 tons shipped during the month.<sup>2</sup>

## **Kazakhstan Rail Grain Shipments Rise Sharply in First Quarter**

In the first quarter of 2026, freight transportation across the network of Kazakhstan Temir Zholy (KTZ) totaled 64.5 million tons, up by 360,000 tons compared with the same period last year.

According to JSC NC Kazakhstan Temir Zholy, domestic freight volumes reached 40.8 million tons, while exports amounted to 23.7 million tons, marking a 2.2% year-on-year increase.

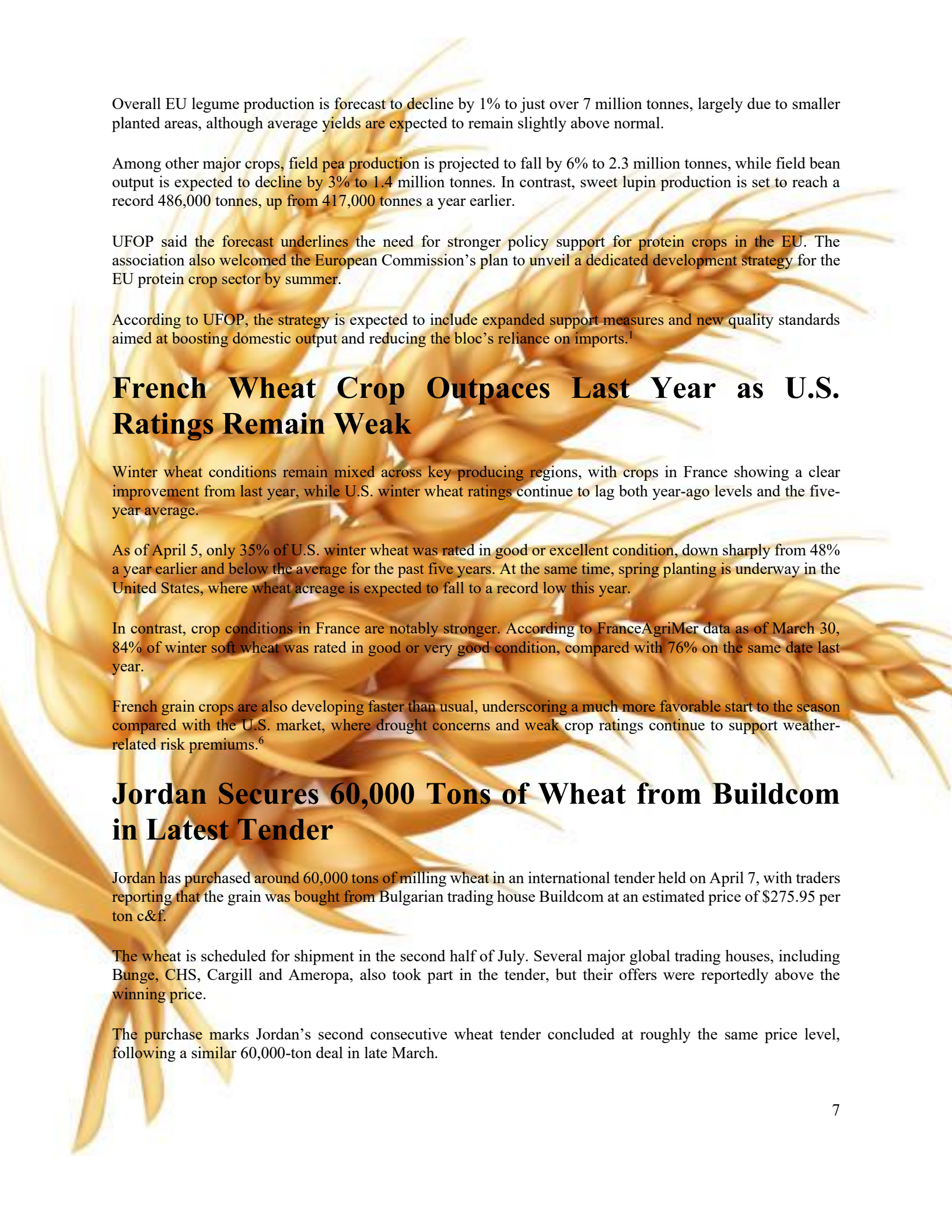
Grain shipments showed particularly strong growth. Total grain loading rose by 15.4% to 4.1 million tons in January-March, while grain exports increased by 17.5% to 3.3 million tons.

Exports of milled products also posted positive dynamics, rising by 6.2% year-on-year to 570,000 tons.

Fertilizer transportation expanded as well, increasing by 3% to 1.2 million tons during the reporting period.<sup>2</sup>

## **EU Soybean Output Seen Rising 2% in 2026 as Overall Legume Production Slips**

The European Commission expects EU soybean production to increase by 2% in 2026 to 2.8 million tonnes, making soybeans the only major legume crop projected to post growth next year, according to Germany's Union for the Promotion of Oil and Protein Plants (UFOP).



Overall EU legume production is forecast to decline by 1% to just over 7 million tonnes, largely due to smaller planted areas, although average yields are expected to remain slightly above normal.

Among other major crops, field pea production is projected to fall by 6% to 2.3 million tonnes, while field bean output is expected to decline by 3% to 1.4 million tonnes. In contrast, sweet lupin production is set to reach a record 486,000 tonnes, up from 417,000 tonnes a year earlier.

UFOP said the forecast underlines the need for stronger policy support for protein crops in the EU. The association also welcomed the European Commission's plan to unveil a dedicated development strategy for the EU protein crop sector by summer.

According to UFOP, the strategy is expected to include expanded support measures and new quality standards aimed at boosting domestic output and reducing the bloc's reliance on imports.<sup>1</sup>

## **French Wheat Crop Outpaces Last Year as U.S. Ratings Remain Weak**

Winter wheat conditions remain mixed across key producing regions, with crops in France showing a clear improvement from last year, while U.S. winter wheat ratings continue to lag both year-ago levels and the five-year average.

As of April 5, only 35% of U.S. winter wheat was rated in good or excellent condition, down sharply from 48% a year earlier and below the average for the past five years. At the same time, spring planting is underway in the United States, where wheat acreage is expected to fall to a record low this year.

In contrast, crop conditions in France are notably stronger. According to FranceAgriMer data as of March 30, 84% of winter soft wheat was rated in good or very good condition, compared with 76% on the same date last year.

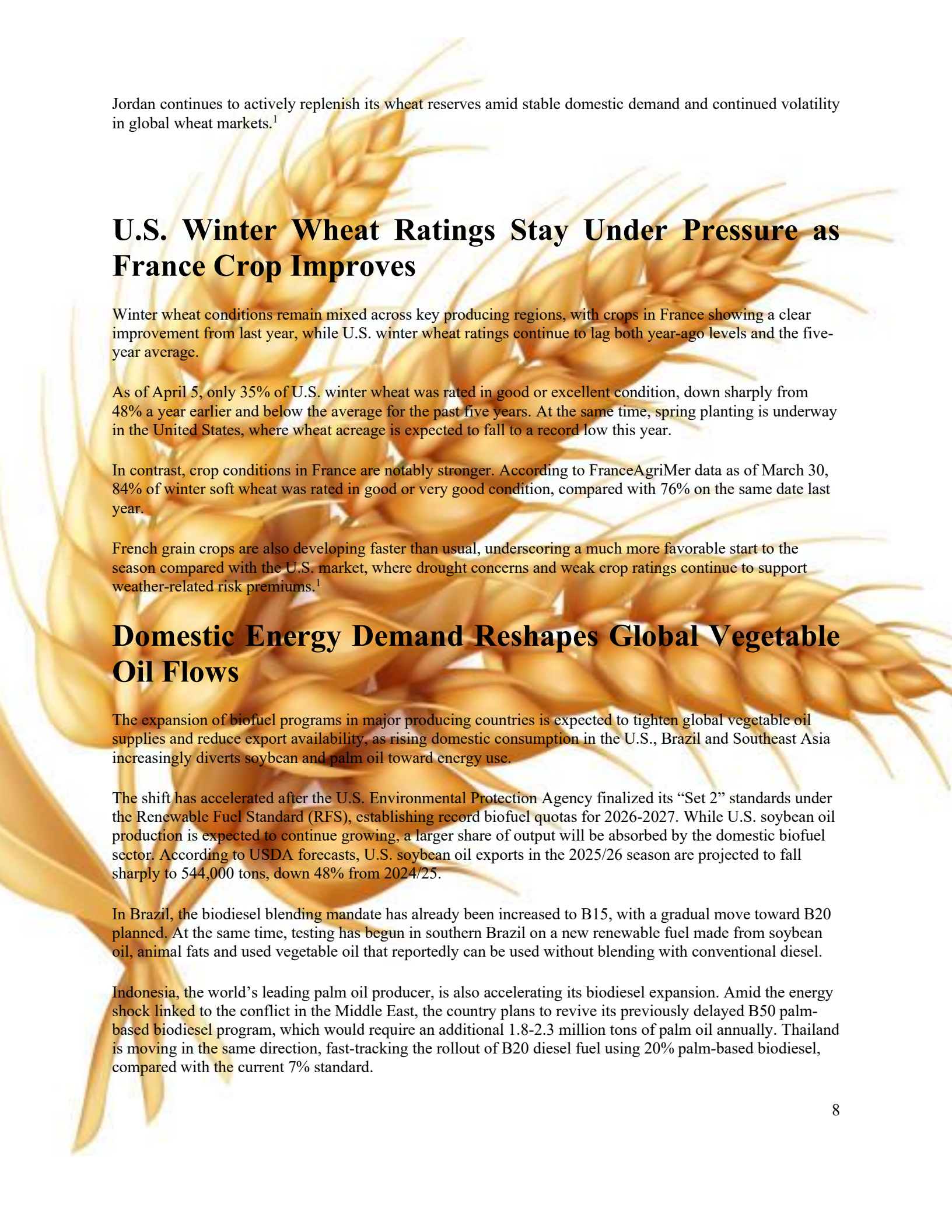
French grain crops are also developing faster than usual, underscoring a much more favorable start to the season compared with the U.S. market, where drought concerns and weak crop ratings continue to support weather-related risk premiums.<sup>6</sup>

## **Jordan Secures 60,000 Tons of Wheat from Buildcom in Latest Tender**

Jordan has purchased around 60,000 tons of milling wheat in an international tender held on April 7, with traders reporting that the grain was bought from Bulgarian trading house Buildcom at an estimated price of \$275.95 per ton c&f.

The wheat is scheduled for shipment in the second half of July. Several major global trading houses, including Bunge, CHS, Cargill and Ameropa, also took part in the tender, but their offers were reportedly above the winning price.

The purchase marks Jordan's second consecutive wheat tender concluded at roughly the same price level, following a similar 60,000-ton deal in late March.



Jordan continues to actively replenish its wheat reserves amid stable domestic demand and continued volatility in global wheat markets.<sup>1</sup>

## **U.S. Winter Wheat Ratings Stay Under Pressure as France Crop Improves**

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## **Domestic Energy Demand Reshapes Global Vegetable Oil Flows**

The expansion of biofuel programs in major producing countries is expected to tighten global vegetable oil supplies and reduce export availability, as rising domestic consumption in the U.S., Brazil and Southeast Asia increasingly diverts soybean and palm oil toward energy use.

The shift has accelerated after the U.S. Environmental Protection Agency finalized its “Set 2” standards under the Renewable Fuel Standard (RFS), establishing record biofuel quotas for 2026-2027. While U.S. soybean oil production is expected to continue growing, a larger share of output will be absorbed by the domestic biofuel sector. According to USDA forecasts, U.S. soybean oil exports in the 2025/26 season are projected to fall sharply to 544,000 tons, down 48% from 2024/25.

In Brazil, the biodiesel blending mandate has already been increased to B15, with a gradual move toward B20 planned. At the same time, testing has begun in southern Brazil on a new renewable fuel made from soybean oil, animal fats and used vegetable oil that reportedly can be used without blending with conventional diesel.

Indonesia, the world’s leading palm oil producer, is also accelerating its biodiesel expansion. Amid the energy shock linked to the conflict in the Middle East, the country plans to revive its previously delayed B50 palm-based biodiesel program, which would require an additional 1.8-2.3 million tons of palm oil annually. Thailand is moving in the same direction, fast-tracking the rollout of B20 diesel fuel using 20% palm-based biodiesel, compared with the current 7% standard.

Analysts at Agroexport say the rapid development of biofuel industries in major exporters of soybean oil and palm oil will increase domestic consumption in those countries and reduce the volumes available for global trade.

Against this backdrop, soybean oil prices on the export market have climbed to their highest level since February 2023, reaching \$1,205 per ton FOB Argentina, while palm oil prices have risen to \$1,265 per ton FOB Indonesia, the highest since December 2024. <sup>4</sup>

## **Canada's Grain and Oilseed Exports Slip 2% as Canola and Corn Shipments Fall**

Canada exported 33.5 million tonnes of grains, pulses and oilseeds between August 1, 2025 and March 29, 2026, down 2% from the same period a year earlier, according to Zerno Online, citing data from the Canadian Grain Commission.

The overall decline was driven mainly by weaker canola and corn shipments. Canola exports fell to 5.3 million tonnes, down 23% from the same period last season, while corn exports dropped sharply to 0.4 million tonnes, a decline of 73%.

At the same time, several other export categories posted strong gains. Soft wheat exports rose to 14.5 million tonnes, up 4% year-on-year, while durum wheat also increased 4% to 3.8 million tonnes. Barley exports surged 70% to 2.3 million tonnes.

Among pulses, pea exports climbed 24% to 1.8 million tonnes, and lentil shipments increased 20% to 1.0 million tonnes. Soybean exports remained unchanged from last season at 3.6 million tonnes. <sup>1</sup>

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