

# *CSI DAILY NEWS*

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## **Türkiye eyes stronger wheat harvest but faces rising market and structural challenges**

Türkiye is entering the 2026 harvest season with improved wheat production prospects, supported by favorable weather conditions, but industry experts warn of mounting challenges across the agricultural sector.

Speaking at a pre-harvest congress of the National Grain Council in Konya, participants highlighted both optimism for crop output and concerns over structural shifts in production and trade.

According to Bayram Sade, wheat production could reach 22.75–23.25 million tonnes if favorable weather continues through April and May. Strong winter precipitation has been a key driver, exceeding long-term averages by 47% and more than doubling last year's levels.

Regional forecasts point to uneven but widespread growth, with the largest increases expected in southeastern and Mediterranean regions. However, experts stressed that rainfall alone will not determine yields, noting the importance of soil quality and farming practices.

Changes in crop patterns are also becoming evident. Süleyman Soylu noted that wheat planting area has expanded to around 7.5 million hectares, while corn acreage is declining due to water shortages. Reductions in cotton and durum wheat areas are also being observed, alongside growing interest in lentils.

These shifts are impacting downstream industries. Aykut Göymen warned that Türkiye's pasta sector, which exports about 1.5 million tonnes annually, may face overcapacity of up to 4 million tonnes amid rising global competition and protectionist trends.

In the flour sector, Mesut Çakmak highlighted low capacity utilization of around 45% across the country's mills, with export challenges linked to trade restrictions and financial difficulties in key markets such as Iraq.

Global market dynamics add further uncertainty. Eren Günhan Ulusoy noted that current wheat prices around \$240 per tonne are insufficient to cover production costs, while geopolitical risks and disruptions in key trade routes continue to influence prices through higher energy, fertilizer, and logistics costs.

Government representatives emphasized readiness for the new season. İbrahim Yumaklı stated that fertilizer supply remains stable, while Ahmet Güldal confirmed that storage infrastructure, including licensed warehouses exceeding 14 million tonnes, is prepared for the incoming harvest.

Overall, the sector is entering the new season with stronger production expectations but facing a more complex and risk-prone market environment.<sup>1</sup>

## **USDA Raises Forecasts for Russian Wheat Output and Exports for 2025–2026 Season**

The United States Department of Agriculture has revised upward its outlook for Russia's grain sector in the 2025–2026 season.

According to the April report from the Foreign Agricultural Service, Russia's wheat production forecast has been increased by 0.8 million tons to 90.3 million tons. Wheat exports are also expected to grow, with the estimate raised by 1 million tons to 44.5 million tons.



The agency also improved its outlook for Russian corn. Production is now projected at 14.8 million tons, up by 0.3 million tons from the previous forecast, while exports are expected to reach 3.3 million tons, also up by 0.3 million tons.<sup>3</sup>

## **Russian Sunflower Prices Hit Nine-Month High as Vegetable Oil Markets Surge**

Sunflower prices in Russia have climbed to their highest level since June 2025, supported by strong demand and rising global vegetable oil markets.

According to SovEcon, average sunflower prices in early April reached 36,775 rubles per tonne (EXW, European part of Russia, excluding VAT), marking a roughly 2% increase over March.

Higher energy prices linked to tensions in the Middle East have driven up vegetable oil markets, particularly those used in biodiesel production. Sunflower oil prices rose to \$1,315 per tonne, compared to \$1,290 a month earlier — the highest level since autumn 2022.

At the same time, Russia's vegetable oil exports hit a record 527,400 tonnes in the first quarter, according to the Rosselkhoznadzor.

Rising sunflower prices have also influenced export policy. In April, the export duty on sunflower oil increased sharply to 16,222.4 rubles per tonne, up from 9,687 rubles in March.<sup>3</sup>

## **Russia Cancels Barley and Corn Export Duties, Cuts Wheat Levy from April 15**

The Ministry of Agriculture of the Russian Federation has announced a revision of grain export duties, including the cancellation of levies on barley and corn starting April 15.

Under the new rates, export duties on both barley and corn have been reduced to zero, while the duty on wheat will be lowered significantly — from 561.5 to 329 rubles per tonne.

The updated duties are based on revised indicative prices:

- wheat — \$233.3 per tonne (previously \$231.3)
- barley — \$218.2 per tonne (previously \$229.4)
- corn — \$222.2 per tonne (previously \$221.4)

Russia's flexible export duty system, introduced in 2021, operates under a grain damper mechanism. The duty is set at 70% of the difference between the indicative price and a base price, with indicative prices calculated from export contracts registered on the Moscow Exchange.<sup>3</sup>

## **Russia Approves Additional 5 Million Ton Grain Export Quota Through June 2026**

The Russian government has approved an additional export quota for grain shipments to countries outside the Eurasian Economic Union, aiming to support domestic producers and expand export opportunities.

According to the decree, the extra tariff quota for wheat, rye, barley, and corn will total 5 million tons and will remain in effect through June 30, 2026. The volume will be allocated among exporters by the Ministry of Agriculture of the Russian Federation on a declarative basis.

The decision reflects strong supply conditions, as Russia's 2025 grain harvest reached 141.2 million tons, according to Rosstat, ensuring sufficient availability for both domestic consumption and exports.

This additional quota comes on top of the main export quota of 20 million tons, which has been in place from February 15 to June 30.<sup>7</sup>

## **Russian Whey Exports Jump 65% in Value on Strong Demand from Belarus and China**

Russia has significantly increased its whey exports at the start of 2026, driven by strong demand from key partner markets.

According to expert estimates, exports in January–February exceeded 4.6 thousand tons, valued at \$4.6 million. Compared to the same period last year, shipments rose by 26% in volume and surged by 65% in value terms.

The growth was largely fueled by higher deliveries to Belarus, where export value increased more than threefold, as well as to China, which recorded a 66% rise. Additional volumes were supplied to Uzbekistan, Kazakhstan, Tunisia, Tajikistan, and other markets.

The data is based on trade statistics within the Eurasian Economic Union for the first months of 2025 and 2026.<sup>4</sup>

## **Ukrainian Feed Corn Prices Edge Lower Amid Export Market Pressure**

Feed corn prices in Ukraine declined slightly this week, following a downward trend on the export market.

According to APK-Inform, the easing in global grain prices has put gradual pressure on the domestic market. However, stronger declines have been limited by steady demand from buyers and a constrained supply from farmers, who remain reluctant to sell.

As of April 10, feed corn prices were reported in the range of UAH 9,000–10,600 per ton CPT, marking a decrease of UAH 100–200 per ton compared to the end of last week.<sup>2</sup>

## **Ukraine Raises FOB Corn Export Price Floor While Lowering CPT Benchmark for April**

The Ministry of Economy of Ukraine has revised minimum allowable export prices for key agricultural commodities under the export support regime.

According to Order No. 4892 dated April 10, the minimum export price for corn on an FOB basis has been increased to \$0.178/kg for April, up from \$0.158/kg in March. This marks the highest level for this indicator since July 2025.

At the same time, the CPT-based minimum price for corn has been lowered to \$0.162/kg, compared to \$0.171/kg in March. This aligns with February levels and represents the lowest point since July 2025.

The updated pricing benchmarks will apply throughout the month to a wide range of agricultural exports, including wheat, meslin, barley, corn, rye, oats, soybeans, rapeseed, sunflower seed, vegetable oils, oilcake, as well as honey and nuts.<sup>2</sup>

## **Kazakhstan and Russia Deepen Agricultural Cooperation as Trade Continues to Grow**

Kazakhstan and Russia are strengthening cooperation in the agricultural sector, with bilateral trade showing steady growth and new areas of collaboration under discussion.

During a meeting between Kazakhstan's Agriculture Minister Aidarbek Saparov and Russia's Agriculture Minister Oksana Lut, the parties reviewed progress in trade and outlined future priorities.

According to the Ministry of Agriculture of Kazakhstan, mutual agricultural trade increased from \$2.9 billion in 2021 to \$4.4 billion in 2025, with a further 6.6% rise recorded in January 2026. Kazakhstan's agricultural exports have been growing at an even faster pace, rising by 15.7% in 2025 and by 17.8% in January this year.

The ministers highlighted the importance of removing trade barriers, improving transit conditions, and expanding Kazakhstan's exports to the Russian market. Cooperation has also advanced through the integration of digital systems, including interaction with the Mercury system for electronic phytosanitary certification.

In addition to trade, the talks focused on joint initiatives in agricultural science, education, and innovation. These include the development of carbon monitoring projects and agrotechnoparks, as well as collaboration in breeding and seed production.

Phytosanitary safety was another key topic, with both sides emphasizing coordinated efforts to control pests such as locusts. Expanded monitoring using modern technologies, including agrodrones, is planned for the current year.<sup>2</sup>

## Ukraine to Expand Sunflower and Rapeseed Areas While Boosting Oil Output in 2026/27

Ukraine is set to expand sunflower and rapeseed planted areas in the MY 2026/27 at the expense of soybeans, while total oilseed acreage is expected to remain stable amid favourable spring weather conditions. This is stated in the annual oilseeds report of the Foreign Agricultural Service released on April 8.

The FAS projects sunflower production at 12.8 million tonnes, up 16% year-on-year, while rapeseed output is expected to increase by 25% to 4 million tonnes. Soybean production, in contrast, is forecast to decline by 5% to 4.7 million tonnes.

Total oilseed area in 2026/27 is forecast at 8.6 million hectares, matching the five-year average. According to the State Statistics Service of Ukraine, 1.3 million hectares of winter rapeseed have already been planted, up 11% compared with the previous year.

The remaining oilseed area will be split between spring crops, primarily sunflower and soybeans. Sunflower acreage is projected at 5.4 million hectares (+6%), while soybean area is expected to fall to 1.8 million hectares (-11%).

Sunflower seed exports in 2026/27 are forecast at 30,000 tonnes, down 14% from the previous estimate for 2025/26. Soybean exports are projected at 1.7 million tonnes (-15%), while rapeseed exports are expected to decline by 5% to 2 million tonnes.

FAS notes that export duties on soybeans and rapeseed, excess crushing capacity, and limited sunflower seed availability have driven higher crushing activity for soybeans and rapeseed in 2025/26. This trend is expected to continue into 2026/27.

Crushing capacity in Ukraine is estimated at around 20 million tonnes annually, although no recent official statistics are available. This includes both large industrial plants and smaller rural cold-press facilities.

Sunseed crushing is projected to increase by 1.7 million tonnes to 12.7 million tonnes in 2026/27. Soybean crushing is expected to decline to 3 million tonnes (-100,000 tonnes), while rapeseed crushing is forecast to rise by 900,000 tonnes to 2 million tonnes.

Sunflower oil production is seen rising by 15% year-on-year to 5.5 million tonnes. Soybean oil output is projected to fall by 3% to 551,000 tonnes, while rapeseed oil production is expected to increase by 25% to 820,000 tonnes.

Ukraine is expected to remain the world's largest exporter of sunflower oil, with shipments projected at 5 million tonnes in 2026/27, up by 500,000 tonnes from the previous estimate. Rapeseed oil exports are forecast to jump by 84% to 825,000 tonnes, while soybean oil exports are expected to decline by 4% to 550,000 tonnes.

The European Union will remain the primary market for Ukrainian oilseeds and vegetable oils. However, domestic demand for vegetable oils—mainly sunflower oil—is declining due to population outflows caused by the ongoing war with Russia, now in its fourth year. <sup>2</sup>



## **Ukraine's Soybean Market Rebounds on Strong Domestic Demand Despite Weak Exports**

Ukraine's soybean market is showing early signs of recovery, driven mainly by strong domestic demand rather than exports.

Processing plants are actively purchasing raw materials as demand for soybean meal and oil increases. This has already pushed prices higher, with some buyers raising bids by around 500 UAH/t to approximately 22,000 UAH/t. In the short term, prices could reach 22,500 UAH/t, with potential to climb further toward 23,000–24,000 UAH/t if current conditions persist.

At the same time, the export segment remains weak. Ukrainian soybeans are facing strong competition from cheaper Brazilian supplies on the global market, while the 10% export duty continues to limit competitiveness.

External factors are also playing a role. Rising global oil prices are supporting the oilseed market overall, increasing demand for vegetable oils and indirectly supporting soybean prices.

Looking ahead, soybeans could remain a profitable crop in the next season. However, analysts advise a balanced approach, as market conditions depend on both global competition and domestic processing demand.<sup>1</sup>

## **EU Wheat Harvest Seen Falling 6% in 2026/27 Amid Weather Risks and Lower Inputs**

The European Union's soft wheat production is projected to fall in the 2026/27 season, according to forecasts from Expana. Output is expected to reach 128.7 million tonnes, down from 137.1 million tonnes in 2025/26.

Barley production is estimated at 52.3 million tonnes for the upcoming season, while corn output is forecast at 58.3 million tonnes. Corn planting area is also expected to drop to historically low levels.


Weather conditions in March were generally favorable for winter crops, supporting early development. However, analysts warn that parts of the EU could face rainfall deficits from mid-spring onward, posing risks to yields. A notable reduction in fertilizer use is also expected to weigh on crop performance.<sup>3</sup>

## **Niche crop exports gain momentum as farmers diversify production**

Exports of niche agricultural crops are gradually expanding as farmers shift toward more diversified production strategies amid lower profitability of traditional crops.

According to data from the Don branch of the Center for Quality Assessment of the Agro-Industrial Complex, shipments of several niche products have resumed in 2026 for the first time in years. These include oatmeal, hemp seeds and other specialty crops.

Recent deliveries highlight growing geographic diversification. Kazakhstan imported small volumes of technical hemp seeds, Japanese millet and oatmeal for food use. Serbia received its first shipment of lentils, while Belarus



imported canary seed for the first time. Mongolia has also resumed purchases of mustard seeds, reflecting renewed demand.

Although export volumes remain relatively modest, the trend is seen as significant. Market participants note that the key development is not scale but the re-emergence of these products in international trade, indicating stable demand and new opportunities for producers.

Analysts expect niche crops to continue gaining importance as farmers seek higher margins and more flexible market positioning. <sup>1</sup>

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