

# *CSI DAILY NEWS*

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*07.05.2026*





## **Turkey Uses Nearly 20% of Corn Import Quota Ahead of New Harvest**

Turkish importers have already utilized 580,500 tons of the country's 3 million ton corn import quota, according to Zerno On-Line, citing European traders.

The quota, which is valid from April 20 through July 31, 2025, allows corn imports at a reduced import duty of 5%. Shipments exceeding the quota are subject to a significantly higher tariff of 130%, encouraging importers to secure supplies within the preferential window.

Turkey is expected to begin harvesting its new corn crop in August. According to estimates from the U.S. Department of Agriculture, the country's corn production reached 7.9 million tons in 2025, up from 6.8 million tons in 2024.<sup>1</sup>

## **Early Soil Drought Signs Detected in Rostov Oblast**

Authorities in Rostov Oblast are considering the possibility of artificially inducing rainfall as early signs of soil drought emerge across the region.

Regional Agriculture Minister Anna Kasyanenko said on social media that initial indicators of insufficient soil moisture have already been recorded, raising concerns for the agricultural sector.

According to the minister, the option of using weather-modification technologies remains under discussion. However, she noted that several technical and regulatory challenges could complicate implementation, including restrictions related to aviation operations.

Officials have not yet announced a final decision regarding possible rainfall enhancement measures.<sup>4</sup>

## **Russia Flour Production Holds Steady in First Quarter**

Flour production in Russia remained broadly stable during the first quarter, totaling 2.4 million tonnes, according to Irina Glazunova, deputy general director of the Institute for Agricultural Market Studies (IKAR), speaking to Agroexpert.

Production of wheat and wheat-rye flour increased by 0.3% year-on-year to 2.2 million tonnes. Within this category, wheat flour output rose 1.1% to 1.6 million tonnes, while production of second-grade flour increased 1.5% to 47,300 tonnes.

At the same time, first-grade flour production declined 4.3% to 369,700 tonnes, while rye flour output fell 6.9% to 100,900 tonnes.

During the current milling season from August 2025 through March 2026, Russian milling enterprises produced 6.5 million tonnes of flour. The production gap compared with the same period of the previous season narrowed to 87,900 tonnes.

The highest flour production level since 2015 was recorded during the 2023/24 season, when output reached 6.97 million tonnes. <sup>4</sup>

## **Lower Export Duties Restore Profitability to Russian Sunflower Processors**

A reduction in export duties has helped restore profitability for sunflower processing in Russia, according to analysts at Oleoscope.

Current net profitability in the sector is estimated at around 3%, equivalent to approximately 1,300 rubles per tonne of finished product.

Analysts project that the export duty on sunflower oil could reach 4,676.4 rubles per tonne in June, assuming the current dollar exchange rate remains stable. The projected rate would be only 26.4 rubles higher than the duty level set for May.

The recovery follows a prolonged period of negative margins for processors. According to the Russian Oil and Fat Union, sunflower processing profitability dropped to minus 7% in April, with the sector remaining under pressure for most of the current season. <sup>4</sup>

## **Institute for Agricultural Market Studies (IKAR) Cuts Russian Wheat Export Forecast**

The Institute for Agricultural Market Studies (IKAR) has lowered its forecast for wheat exports from Russia in the 2025/26 marketing season (July 2025–June 2026) to 44.5 million tonnes, down from the previous estimate of 46 million tonnes.

Speaking to Interfax, Dmitry Rylko, генеральный директор IKAR, said the downgrade was mainly driven by the strong ruble, relatively weak export prices, and softer demand for wheat on the global market.

The revision follows earlier downward adjustments made in April, when IKAR reduced its forecast for Russia's 2026/27 wheat harvest to 90 million tonnes from 91 million tonnes.

At the same time, the institute lowered its wheat export projection for the upcoming season to 46.5 million tonnes from 47.5 million tonnes, reflecting growing pressure on the competitiveness of Russian grain exports. <sup>4</sup>

## **Tatarstan Exports Over 10,000 Tons of Barley to Iran**

More than 10,000 tonnes of barley from Tatarstan have been shipped to Iran via the Volga River, according to regional agricultural authorities.

The cargoes were loaded at facilities in the Rybno-Slobodsky and Alekseevsky districts under the supervision of the regional branch of the Federal State Budgetary Institution Center for Agricultural Research and Development. Vessel holds were disinfected in compliance with the phytosanitary requirements of the importing country before loading operations began.

The deliveries represent the first grain shipments from Tatarstan to Iran this year.

From the start of 2026 through May 5, the republic exported a total of 68,000 tonnes of grain and processed grain products. Exported commodities included wheat, barley, mustard, flax, soybeans, buckwheat, peas, rapeseed, millet, sunflower meal and other agricultural products.

Grain exports from Tatarstan were transported by river, rail and road to 10 destinations, including Iran, Azerbaijan, Belarus, Germany, Kazakhstan, Kyrgyzstan, China, Serbia, Poland and the Czech Republic. <sup>4</sup>

## **Wheat Bran Prices in Ukrainian Ports Decline Amid Weak Demand**

According to APK-Inform, the market for pelleted wheat bran in Ukraine's ports has been moving downward since the beginning of the week.

Analysts attributed the decline primarily to weaker demand from key importing countries, as well as falling prices in the Turkish market. Bid prices for wheat bran in Türkiye decreased by an average of \$5 per tonne, reaching \$225–235 per tonne on a CIF Marmara basis.

The softer pricing environment in Turkey has added pressure to export quotations in Ukrainian ports, contributing to the bearish sentiment currently observed in the wheat bran sector. <sup>2</sup>

## **Ukraine Says Preferential Soybean and Rapeseed Export System Operating Smoothly**

The preferential export regime for soybeans and rapeseed in Ukraine continues to operate steadily and under control, according to Taras Vysotskyi, Deputy Minister of Economy, Environment and Agriculture.

Writing on Facebook, Vysotskyi said that since September 2025, Ukraine has exported nearly 2 million tonnes of soybeans and rapeseed under the preferential system. The total value of transactions conducted within the framework reached UAH 3.5 billion, while budget revenues amounted to UAH 1.8 billion, including UAH 470 million allocated to a special fund.

The deputy minister noted that export volumes declined seasonally in April, which he described as typical toward the end of the marketing year. Further reductions are expected before the new rapeseed export season begins in July.

According to Vysotskyi, authorities have strengthened reconciliation and monitoring procedures for soybean and rapeseed exports between expert conclusions issued by the Ukrainian Chamber of Commerce and Industry and the State Agrarian Register.

In April, the Chamber issued 362 expert conclusions, with an additional 62 documents released during the first days of May. Vysotskyi emphasized that no export approvals had been canceled because of excess volumes, indicating that the system is now operating more accurately than during its initial launch phase.

He also said the government is continuing efforts to fully digitalize grain warehouse documentation as part of a broader strategy to improve transparency, speed up logistics operations and reduce manual intervention.

A separate priority remains the creation of a comprehensive grain traceability system designed to track agricultural products from farms to storage facilities and export channels.

According to the deputy minister, current market indicators show balanced conditions with no critical carry-over stocks, suggesting that the current regulatory framework reflects the actual state of the market.<sup>2</sup>

## **Kazakhstan Wheat Exports Forecast to Drop Sharply in 2026/27**

The Foreign Agricultural Service of the USDA<sup>1</sup> forecasts a significant decline in wheat production and exports from Kazakhstan during the 2026/27 season due to weaker weather conditions and changing market dynamics.

According to the forecast, Kazakhstan's wheat harvest could fall to 14 million tonnes, compared with an estimated 18 million tonnes in 2025 and 18.57 million tonnes in 2024.

The wheat planting area is projected at 11.5 million hectares, nearly unchanged from last season but around 1 million hectares below levels seen two years ago. Analysts attribute the reduction mainly to the expansion of oilseed cultivation, which currently offers stronger profitability for farmers.

As a result of lower expected production, wheat exports in the 2026/27 marketing year are projected to decline sharply to 7.5 million tonnes from 11 million tonnes a season earlier. However, large carryover stocks accumulated after two consecutive large harvests are expected to partially offset the impact of reduced output.

FAS analysts also noted that persistently low wheat prices are encouraging producers to increase barley sowings this spring in hopes of improving returns. Despite this shift, barley exports in 2026/27 are forecast to decline by 200,000 tonnes year-on-year to 1.5 million tonnes because of stronger domestic demand.

Meanwhile, the Kazakh Grain Union reported weak activity in both domestic and export grain markets. Industry representatives said recent tax code changes and the strengthening of the national currency have widened the gap between domestic and export prices, reducing exporter margins and slowing shipments.

Rising prices for Kazakh wheat have also boosted flour exports to markets in Central Asia and Afghanistan, contributing to oversupply in those destinations. According to APK News, this has led to a local decline of around \$5 per tonne in prices for first- and premium-grade flour, creating additional pressure on producers.<sup>3</sup>

## **Sunflower Oil Gains Ground in India as Palm Oil Imports Decline**

Sunflower oil continues to strengthen its position in the India market as importers sharply increased purchases in April, according to Reuters citing trade data.

Indian companies imported 435,000 tonnes of sunflower oil during the month, more than double the March volume and the highest level recorded in the past 22 months. Market participants said traders have been actively building inventories amid concerns over possible logistical disruptions linked to escalating tensions involving Iran.

At the same time, palm oil imports into India declined by 27% month-on-month to 505,000 tonnes, compared with 689,000 tonnes in March. The figure marked the lowest level of palm oil imports in the last year, as rising prices reduced palm oil's traditional cost advantage over competing vegetable oils.

Soybean oil imports also increased strongly in April, rising 24% to 355,000 tonnes, the highest level in four months.

Overall edible oil imports into India rose 10.4% in April 2026 to 1.3 million tonnes, the highest monthly volume recorded so far this year.

Analysts at Oil World expect palm oil to become less competitive globally due to rising domestic biofuel demand, export restrictions and weaker yields in major producing countries.

Industry forecasts suggest global palm oil export supplies could decline by 2 million tonnes year-on-year between April and September 2026, falling to 24.2 million tonnes. Meanwhile, the Indonesian Palm Oil Producers Association (GAPKI) warned that crude palm oil production in 2026 may decrease by around 2 million tonnes from 2025 levels because of dry weather linked to El Niño and higher fertilizer costs caused by the conflict in the Middle East.

The changing dynamics in the global vegetable oil market are expected to support stronger demand for sunflower oil, potentially creating additional export opportunities for producers from Russia.<sup>1</sup>

## **Bangladesh Approves Import of 20 Million Litres of Indonesian Soybean Oil for Subsidy Program**

The Bangladesh government has approved the import of 20 million litres of refined soybean oil from Indonesia as part of its subsidized food distribution program aimed at supporting low-income households.

The decision was approved by the Cabinet Committee on Public Procurement chaired by the country's finance minister. The purchase will be carried out through an international open tender by the state-owned Trading Corporation of Bangladesh (TCB) under the Ministry of Commerce.


Officials said two companies participated in the tender process, with Indonesian supplier PT Trinity Chaya Energy selected after meeting the required technical and financial criteria.

Under the agreement, the soybean oil will be purchased at a price of \$1.151 per litre, bringing the total contract value to approximately \$23.02 million. Authorities expect the imports to help ease price pressure in the domestic edible oil market and ensure affordable supplies for lower-income consumers through the TCB card scheme.<sup>1</sup>

## **Iraq Sets New Wheat Purchase Prices Ahead of 2025/26 Harvest Campaign**

Iraq's government has approved new wheat procurement prices and a seed supply program as part of preparations for the 2025/26 harvest season, aiming to strengthen domestic grain production and improve support for farmers.

Under the new policy adopted by the Council of Ministers, wheat produced within the national agricultural program will be purchased at IQD 700,000 per ton, equivalent to about \$534 per ton. Grain delivered outside the program will receive a lower price of IQD 500,000 per ton, or roughly \$381.



The government also introduced production benchmarks based on irrigation methods. Farms using modern irrigation systems are expected to achieve yields of up to 900 kilograms per dunum, while flood-irrigated fields are projected at around 750 kilograms. Rain-fed farms are estimated to produce approximately 300 kilograms per dunum.

To support future planting and grain quality, authorities approved the purchase of 100,000 tons of certified wheat seeds at the same procurement price of IQD 700,000 per ton. In addition, a wheat collection quota of 400,000 tons has been allocated to the Kurdistan Region, although local officials are seeking a higher target amid expectations of a harvest exceeding 2 million tons.

The Council also moved to address delayed farmer payments, authorizing the settlement of outstanding dues for the 2024/25 and 2025/26 seasons. The Ministry of Finance will include the payments in the upcoming budget and provide guarantees to facilitate repayments through the Trade Bank of Iraq.

Although rainfall has delayed the start of harvesting in some areas, officials stated that 78 silos and storage facilities are ready for the campaign. Enhanced quality control measures, including inspections for moisture, pests, and the separation of old and new grain stocks, have also been introduced.<sup>1</sup>

## **Indonesia Expands Import Licensing Rules for Agricultural Products**

Indonesia is set to expand its import licensing system to cover a wider range of agricultural commodities as part of efforts to strengthen domestic food production and protect local farmers.

Beginning May 8, 2026, import permits will be required for products including soybean meal, feed wheat, feed rice, mung beans, peanuts, and pears. Importers will need approval from the Ministry of Trade, supported by technical recommendations from the Ministry of Agriculture, before shipments can enter the country.


Government officials said the policy is intended to stabilize domestic prices, better balance supply and demand, and reduce pressure on local producers from uncontrolled imports. Authorities also hope the measures will encourage increased domestic planting and production, particularly for crops that have lost competitiveness against imported supplies.

The new regulation forms part of Indonesia's broader strategy to reduce dependence on foreign agricultural products while supporting national food security objectives and strengthening the competitiveness of domestic industries.

To ease implementation, the government has introduced a transition period allowing shipments loaded before the regulation takes effect to enter without the new licensing requirements. Officials said the approach is designed to minimize disruptions for businesses while supporting long-term agricultural development.<sup>1</sup>

## **Canada's Wheat and Canola Stocks Rise Sharply, Adding Pressure to Oilseed Markets**

Canada's wheat stocks rose 12% year-on-year to 19.47 million tons as of April 1, according to a report released by Statistics Canada (StatCan). Stocks of soft wheat varieties increased by 10.7% to 16.06 million tons.



Canola inventories also posted a significant increase, climbing 27.4% to nearly 9.99 million tons, supported by a large 2025 harvest and slower export activity.

In contrast, soybean stocks fell sharply by 45.7% to 1.5 million tons amid strong export demand and robust domestic consumption.

The larger-than-expected canola stocks added pressure to oilseed markets, particularly as global oil prices declined. July canola futures dropped 1.9% on the day to 744 Canadian dollars per ton, or about \$545 per ton, though prices remain more than 6% above levels seen before the outbreak of the Iran conflict.

Analysts noted that the increase in Canadian wheat supplies is likely to have only a moderate effect on the global wheat balance. Additional Canadian availability, combined with stronger Russian exports, could help offset potential reductions in U.S. wheat production linked to drought concerns highlighted during the recent Oklahoma crop tour.<sup>1</sup>

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