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Turkey Opens 3 Million Ton Corn Import Quota with Reduced Tariff

The Agricultural Market Information System has reviewed several recent policy measures introduced by major agricultural producers and importers in the grain sector.

In Egypt, authorities increased the state procurement price for domestically produced wheat from 2,350 to 2,500 Egyptian pounds per tonne for the 2026 purchasing campaign. The procurement season runs from April 15 through August 15 and is aimed at encouraging local production while strengthening national food security.

Turkey introduced a corn import quota of 3 million tonnes covering the period from April 20 to July 31, 2026. Imports within the quota are subject to a reduced tariff of 5%, while shipments exceeding the quota face a significantly higher duty of 130%.

In India, the government approved exports of an additional 2.5 million tonnes of wheat, partially easing restrictions that were first imposed in May 2022. As a result, the country's total wheat export quota for the current season has increased to 6 million tonnes.

Meanwhile, Thailand expanded its rice support policies by introducing new assistance measures for farmers. These include fertilizer discounts, programs aimed at improving seed quality, and initiatives designed to optimize soil and nutrient management practices.

The policy adjustments reflect continued government efforts to balance domestic food security, farmer support, and international trade amid ongoing volatility in global agricultural markets.³

Russia and Iran Expand Caspian Sea Trade Amid Sanctions and Regional Instability

Russia and Iran are increasingly shifting trade flows to the Caspian Sea as sanctions pressure and instability in the Middle East continue to disrupt traditional logistics routes, according to reports from The New York Times and PortNews.

The Caspian corridor has become strategically important for Tehran, with four Iranian ports reportedly operating around the clock to handle shipments of wheat, oil, and animal feed. Russian grain exports that were previously routed through the Black Sea are increasingly being redirected through the Caspian Sea because of growing regional uncertainty.

Industry representatives say the Caspian route is becoming more attractive due to both logistical and geopolitical advantages. According to RusIranExpo, cargo turnover along the corridor could potentially double this year.

One of the main advantages of the route is its restricted access. Only the five Caspian coastal states have direct access to the sea, limiting the ability of outside powers to interfere with shipping operations. This has increased the corridor's importance for Russia and Iran as they seek more secure and reliable trade channels.⁵



Grain Exports from Russia's Rostov Region Increase in January–April

Grain and processed grain exports from Russia's Rostov region reached 2.3 million tons during January–April 2026, showing year-on-year growth, according to the regional branch of the Federal Center for Quality and Safety of Agricultural Products.

The institution oversees export quality and safety controls at 43 seaports, including Rostov-on-Don and Azov.

The leading importers of agricultural products from the region were Turkey, Morocco, Egypt, and China.

Wheat remained the dominant export commodity, accounting for 56% of total grain and legume shipments. Other major export products included corn with a 25% share, followed by barley at 8%, peas at 4%, and lentils at 3%.⁷

Russia Exports Coriander Seeds to Suriname in Unusual Trade Shipment

Russia carried out an unusual agricultural export shipment in 2025 by delivering coriander seeds to Suriname, marking one of the more unconventional destinations for Russian farm products.

The shipment exceeded 22 tons in volume and was valued at more than \$20,000. Unlike Russia's typical exports of wheat, vegetable oils, or meat products, the delivery focused entirely on coriander seeds.

The trade route is considered notable because of the significant geographical distance between the two countries. Suriname, located in northeastern South America, lies nearly 9,900 kilometers from Moscow in a straight line.

Another unusual aspect is the consistency of deliveries. Russia has reportedly been exporting coriander seeds to Suriname since 2020, with the exception of 2022, indicating a niche but ongoing trade relationship.

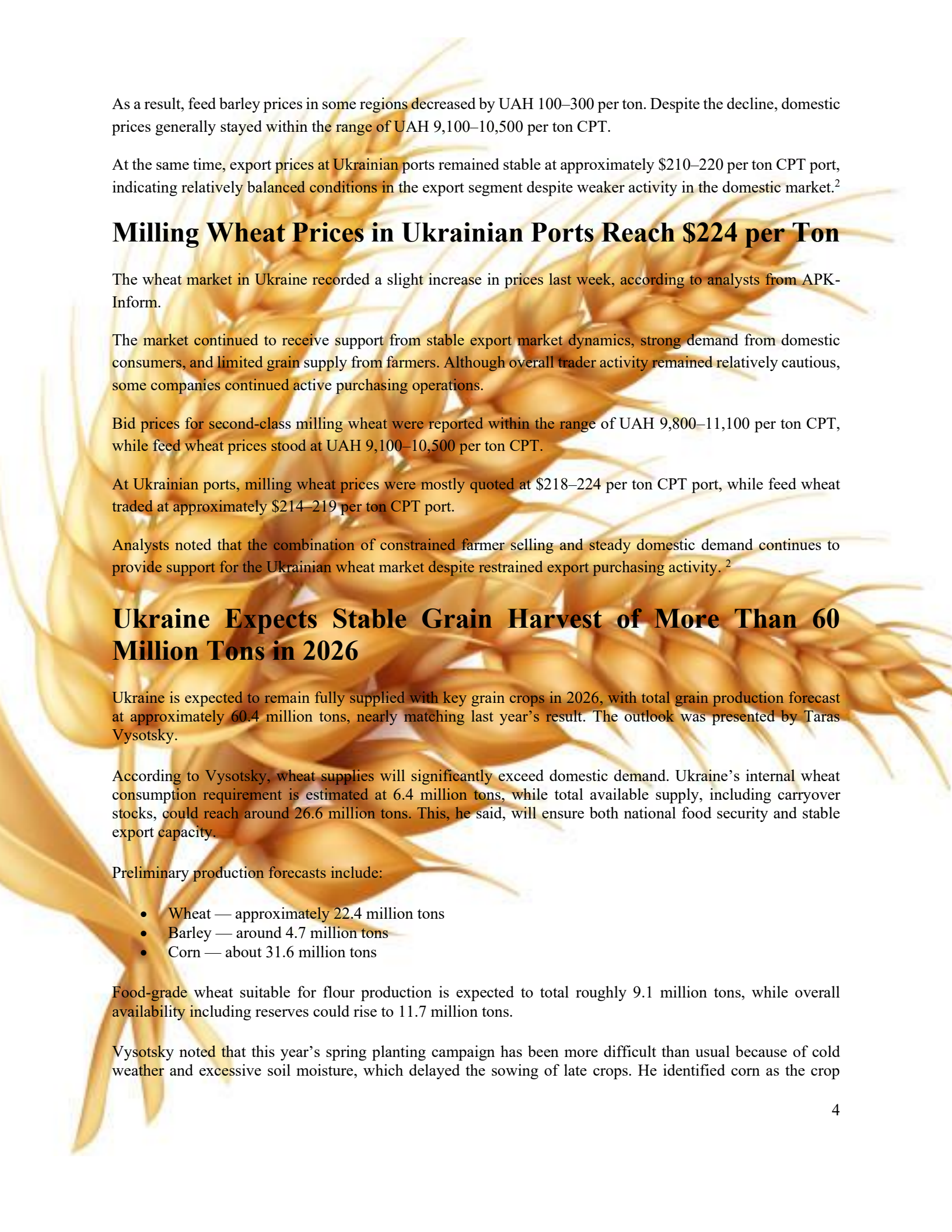
Suriname borders Brazil to the south, Guyana to the west, and French Guiana to the east, while its northern coastline faces the Atlantic Ocean.

The shipment highlights Russia's efforts to diversify agricultural exports and maintain trade ties with smaller and geographically distant markets.⁴

Barley Prices Hold Steady at Ukrainian Ports Despite Domestic Weakness

The feed barley market in Ukraine experienced moderate price declines last week as trading and purchasing activity remained weak, according to APK-Inform.

Analysts noted that only a limited number of buyers continued purchasing barley actively, mainly to secure raw material supplies for medium-term operations. Export demand remained subdued, with exporters showing little interest in additional purchases.



As a result, feed barley prices in some regions decreased by UAH 100–300 per ton. Despite the decline, domestic prices generally stayed within the range of UAH 9,100–10,500 per ton CPT.

At the same time, export prices at Ukrainian ports remained stable at approximately \$210–220 per ton CPT port, indicating relatively balanced conditions in the export segment despite weaker activity in the domestic market.²

Milling Wheat Prices in Ukrainian Ports Reach \$224 per Ton

The wheat market in Ukraine recorded a slight increase in prices last week, according to analysts from APK-Inform.

The market continued to receive support from stable export market dynamics, strong demand from domestic consumers, and limited grain supply from farmers. Although overall trader activity remained relatively cautious, some companies continued active purchasing operations.

Bid prices for second-class milling wheat were reported within the range of UAH 9,800–11,100 per ton CPT, while feed wheat prices stood at UAH 9,100–10,500 per ton CPT.

At Ukrainian ports, milling wheat prices were mostly quoted at \$218–224 per ton CPT port, while feed wheat traded at approximately \$214–219 per ton CPT port.

Analysts noted that the combination of constrained farmer selling and steady domestic demand continues to provide support for the Ukrainian wheat market despite restrained export purchasing activity.²

Ukraine Expects Stable Grain Harvest of More Than 60 Million Tons in 2026

Ukraine is expected to remain fully supplied with key grain crops in 2026, with total grain production forecast at approximately 60.4 million tons, nearly matching last year's result. The outlook was presented by Taras Vysotsky.


According to Vysotsky, wheat supplies will significantly exceed domestic demand. Ukraine's internal wheat consumption requirement is estimated at 6.4 million tons, while total available supply, including carryover stocks, could reach around 26.6 million tons. This, he said, will ensure both national food security and stable export capacity.

Preliminary production forecasts include:

- Wheat — approximately 22.4 million tons
- Barley — around 4.7 million tons
- Corn — about 31.6 million tons

Food-grade wheat suitable for flour production is expected to total roughly 9.1 million tons, while overall availability including reserves could rise to 11.7 million tons.

Vysotsky noted that this year's spring planting campaign has been more difficult than usual because of cold weather and excessive soil moisture, which delayed the sowing of late crops. He identified corn as the crop



facing the greatest weather-related risks because of its sensitivity to planting timing, temperatures, and moisture conditions during the growing season.

At the same time, he described wheat and barley forecasts as realistic and sufficient to maintain the country's food balance, emphasizing that Ukraine's agricultural sector continues to adapt effectively under challenging conditions.

The deputy minister also highlighted a broader shift within the industry toward higher value-added production rather than reliance on raw commodity exports. Domestic processing and exports of flour, bakery products, frozen foods, and semi-finished products are expanding steadily.

According to Vysotsky, the HoReCa and Bake-off segments are developing particularly quickly, with growing demand for frozen bakery goods and ready-to-use food products for restaurants, hotels, cafes, and retail chains both in Ukraine and international markets.¹

EU Eliminates Additional Controls on Canadian Flaxseed Shipments

The European Union has officially ended the sampling and testing requirements for Canadian linseed exports that had been in place since 2009. The decision, announced by Agriculture and Agri-Food Canada, took effect on May 1, 2026, and is expected to strengthen agricultural trade relations between Canada and Europe.

The controls were introduced after traces of the genetically modified linseed variety CDC Triffid were detected in a Canadian shipment exported to Europe in 2009. Following the discovery, Canadian linseed exports faced temporary suspension, and mandatory testing procedures were implemented for all shipments entering the EU market.

Canadian authorities stated that no further detections of the unauthorized GM variety have been recorded over the past 13 years. After extensive monitoring and cooperation between Canadian officials, the EU, the Canadian Grain Commission, and industry groups, both sides agreed that the additional testing measures were no longer necessary.

According to Canadian officials, the removal of the protocol confirms the quality and reliability of Canadian agricultural exports while also reducing administrative costs and logistical burdens for exporters.

Canada remains one of the world's leading producers and exporters of linseed. In 2025, the country produced more than 454,000 tonnes and exported nearly \$230 million worth of linseed globally, including over \$73 million shipped to the European Union.

The Canadian government believes the removal of the restrictions will create new growth opportunities for farmers, processors, and agricultural exporters targeting the European market.¹

Poland's Rapeseed Crop Faces Growing Pressure from Weather Extremes

Farmers in Poland are reporting worsening conditions for winter rapeseed crops because of prolonged drought and frost damage during April, according to Farmer.pl.

The lack of moisture has become a major concern across several agricultural regions. Rapeseed has been particularly affected, with farmers describing crops as short, poorly branched, and heavily stressed after drought conditions and late frosts. In some fields, expected yields have fallen to around 1–1.5 tons per hectare, while certain areas face the risk of complete crop failure.

The moisture deficit is affecting not only Lower Silesia but also the Opole, Greater Poland, West Pomeranian, and Kuyavian-Pomeranian regions.

The situation may have broader implications for the European oilseed market. If Poland's rapeseed production declines significantly, it could tighten EU supply balances and increase demand for imported raw materials, including rapeseed from Ukraine.

In 2025, the Polish Oil Producers Association urged the government to allow imports of Ukrainian rapeseed, estimating that Poland could face a supply deficit of at least 500,000 tons during the 2025/26 season.

However, Poland continues to maintain national restrictions on imports of Ukrainian wheat, corn, rapeseed, and sunflower despite adjustments in the broader EU–Ukraine trade framework.

Serhii Orlovskiy, founder of AgroOilTrade, said that opening the Polish market to Ukrainian rapeseed would support Ukraine's agricultural sector by increasing demand and improving prices.

According to Orlovskiy, many Polish processors view the import restrictions as economically unfavorable for the domestic industry, though the issue remains primarily political.¹


China Buys Record Volumes of Russian Vegetable Meal in Early 2026

China imported a record volume of Russian vegetable meal during the first four months of 2026, according to calculations by Agroexport.

Between January and April, exports of Russian vegetable meal to China exceeded 600,000 tons, representing a 78% increase compared to the same period last year and marking the highest level ever recorded for this timeframe.

China also became the largest export destination for Russian vegetable meal products during the period. A year earlier, Turkey had been the leading buyer, while shipments to Belarus were previously comparable to Chinese import volumes.

Analysts said Russia's growing market share in China was supported in part by limited progress in shipments of Canadian canola and canola meal to the Chinese market. At the same time, Russia's record rapeseed harvest enabled domestic processors in both western and eastern regions of the country to maintain high production levels.



Exports of soybean meal showed particularly strong growth. China imported approximately 300,000 tons of Russian soybean meal during the period, an increase of more than nine times compared to the previous year. Chinese purchases of Russian sunflower meal also increased by 33% to around 200,000 tons, reinforcing China's position as one of the largest buyers of the product.

Analysts also noted that additional growth potential could emerge through the expansion of exports of flax meal and flax cake. Production of these products in Russia has reportedly increased sharply, with current-season output running nearly 4.5 times ahead of last year's pace.⁶

US Winter Wheat Conditions Fall to Worst Level in 30 Years

The condition of winter wheat crops in the United States has deteriorated to its weakest level in approximately three decades, according to data from the National Agricultural Statistics Service cited by Grain Online.

Only 28% of winter wheat fields are currently rated in excellent or good condition, down from 31% a week earlier and significantly below the 62% recorded during the same period last year. Analysts describe this as the lowest rating for this stage of the season in the past thirty years.

At the same time, spring planting activities across the country are progressing at a relatively fast pace.

As of May 10:

- Soybeans had been planted on 49% of the planned area, compared with 45% a year earlier and a five-year average of 36%
- Corn sowing reached 57% completion, versus 59% last year and a five-year average of 52%
- Spring wheat planting was 53% complete, compared with 63% last year and an average of 51%

The contrast between rapid spring planting progress and deteriorating winter wheat conditions highlights the growing impact of weather-related stress on parts of the US grain sector.⁵

Argentina Moves to Protect Soybean Exports After EU GMO Concerns

Argentina is taking steps to preserve soybean exports to European Union markets after genetically modified HB4 soybeans were detected in shipments of Argentine soybean meal, according to Bloomberg.

The Netherlands recently rejected several shipments after tests identified the presence of drought-resistant HB4 soybeans. While the variety is approved for use in Argentina and China, it has not yet been authorized within the European Union.

The issue is considered particularly significant because the Netherlands serves as one of Europe's main import and distribution hubs for soybean products. Market participants warn that the situation could potentially lead to broader restrictions on Argentine soybean exports to the EU if contamination concerns continue.

The dispute comes at a sensitive moment for Argentina's economy. Soybean exports generated approximately \$18 billion in revenue last year, and the government had been expecting additional growth in shipments following the signing of the EU-Mercosur trade agreement.

To avoid further disruptions, Argentine farmers and exporters are now attempting to separate HB4 soybeans from conventional supplies. Industry representatives said they are working with food safety authorities to organize direct transportation from farms to ports while bypassing processors in order to reduce contamination risks.

Shipments containing HB4 soybeans are expected to be redirected primarily to China, where the genetically modified variety is already approved for import and use.¹

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