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Market News

- US farm debt soars to levels seen during 1980s farm crisis
- African swine fever China report
- South Africa – Government has taken steps to increase local wheat production
- Room for yield growth in Russian wheat, but challenges remain
- US maize acreage to rise by 3mn in 2019
- India’s maize exports becoming unviable and uncompetitive on price
- Asian millers turn to Argentina for wheat as drought hits Australian output
- Iran’s maize need key as Brazil’s export, import flow up-ended
- Australia – Lowest grain production in more than 20 years
- Moroccan wheat market interest Australian operators

Reports

- The State of the World’s Biodiversity for Food and Agriculture - FAO
- Le Déméter 2019 - IRIS

Monthly Information Sources

- AMIS Market Monitor
- FAO Cereal Supply and Demand Brief - FAO
- Grain Market Report – IGC
- Oilcrops Monthly Price and Policy Update – FAO
- Crop Monitoring in Europe - European Commission
- FAO Rice Price Update – FAO
- World Agricultural Supply and Demand Estimates – USDA
- Early Warning Crop Monitor – GEOGLAM
- Commodity Price Data - World Bank
- Food Price Monitoring and Analysis (FPMA) – FAO
- GIEWS Country Briefs - FAO

Market News

US farm debt soars to levels seen during 1980s farm crisis

27 February - Reuters

The amount of debt held by America's farmers has risen rapidly to 1980s-levels at $409 billion from $385 billion last year, with loan demand remaining "historically high," U.S. Agriculture Secretary Sonny Perdue said on Wednesday.
The figures reflect a level of strain on the U.S. farm belt that is comparable to the agricultural crisis of three decades ago, this time driven by lingering weakness in commodity prices, storms damaging crops and loss of key export markets such as China due to President Donald Trump's trade disputes.
"Farm debt has been rising more rapidly over the last five years, increasing by 30 percent since 2013 – up from $315 billion to $409 billion, according to USDA data, and up from $385 billion in just the last year – to levels seen in the 1980s," Perdue said in his testimony to the House Agriculture Committee.
But he added: "Relatively firm land values have kept farmer debt-to-asset levels low by historical standards at 13.5 percent, and continued low interest rates have kept the cost of borrowing relatively affordable."
"But those average values mask areas of greater vulnerability," he said.
In the 1980s, thousands of farm operations financially collapsed after producers dealing with low crop prices fell behind on high-interest land and equipment loans.
USDA chief economist Robert Johansson said late last week that the U.S. Department of Agriculture is concerned about a potential future decline in farmland real estate prices, a key pillar of equity for the U.S. agricultural heartland, but has seen no sign of that happening so far.
Farm incomes and agrarian credit conditions continued to erode in the second half of 2018 and for bankers one key concern has been the amount of farmland that could come up for sale in the coming months and whether that could trigger an across-the-board drop in land prices.
"I get more phone calls from bankers these days than farmers," Austin Scott, Congressman from Georgia, said at the hearing.
The Trump administration has pledged up to $12 billion in aid for farmers to offset their losses from the trade fights. Perdue said more than $8 billion has been paid as part of those programs to date. USDA has said there will not be an aid package for 2019.

back to top

African swine fever China report

27 February – Thepigsite.com

Genesus has been the largest exporter of swine breeding stock to China the last three years.
Many industry contacts tell us they believe that in China the sow herd could be down 20 percent by the time ASF gets somewhat controlled.
In January the latest China Ministry of Agriculture information indicates the Chinese sow herd declined 1.36 million sows. This is in one month!
The decline is greater than the sow herd of Canada, Netherlands, or Denmark.

All gone in four weeks!
The same database indicates since January's inventory a year ago, China's breeding herd has declined 5.5 million sows. What's happening is hard to comprehend. Not sure data is 100 percent accurate, but no doubt huge liquidation underway.
China industry speculation is hog's will reach 20-23 RMB/kg live weight by second half of 2019 ($1.37 - $1.60 U.S. live weight a lb.).
Chinese public traded swine companies (Shanghai Stock Exchange) have seen their stock double to triple as the market speculates on the expected profits that will come from expected record prices.
If 20 percent sow drop, the weekly hog marketing's will decline about 2.5 million hogs per week. The rest of the world will have great opportunity to help backfill the shortfall.
We believe current US lean hog futures are significantly discounted to what we expect will happen when China starts their needed imports.
We will not be surprised if the worlds hog prices reach record levels.
The longer China's sow herd liquidation continues, the higher the high and the longer it lasts.
Last week was tough for lean hog futures.
On Friday 15 February, April lean hog futures were at 60.27₵ lb. by Wednesday, 20 February they dropped to 52.25₵ lb. 8₵ lb. The 8₵ lb drop was dramatic and traumatic. Our Industry is losing money currently at a $20 US plus clip. As producers we mostly have an optimistic gene, but a drop of 8₵ shakes even the most optimistic soul.
US packer gross margins have fallen from their record high levels. If we use last Fridays close on US pork cut-outs of 59.01₵ lb. and 53.13₵ lb. for a 53-54 percent lean hog. The spread of about 6₵ lb. probably means packers have next to no money left over after hog harvesting costs. If the packer owns hogs the model of harvesting your own probably means negative margins just like most other hog producers.
More packer capacity is just around the corner with Prestage having an open house 2 March for their new Iowa plant (1,000 head per hour capacity). More capacity probably means record gross packer margins are a thing of the past.
US hog slaughter year to date is up 2.3 percent while the hog price is currently $30 per head less than a year ago. In our opinion, Mexico's 20 percent tariff and China's 72 percent tariff on US pork is the blame for much of $30 per head difference.
US trade talks with China and Mexico are ongoing. It is in the US pork industry best interest that somehow there is a resolution. Our sense is that the US industry has stopped net expansion and we would not be surprised if the US sow inventory 1 March is not lower then June last year.
Small pig traders report all pigs moving with barn space available but challenge is buyers' confidence.
Last week we read where the National Pork Producers Council is pushing for the USDA to take over from the US Food and Drug Administration the regulation of GMO-Gene Editing of swine.
We are not sure why as an industry if we believe GMO-Gene Editing is safe why we would not want it to be regulated and approved by the strictest protocols, which undoubtedly the US Food and Drug Administration would provide.
If we want consumers to have the utmost confidence in the pork we sell then why would we not want to have it proven by the strictest protocols. A move to USDA would only make it easier for approval, that's the reason for the push. Don't we want to make sure it's safe for our consumers, ourselves and our children?

Recently we were with European producers. In Europe the courts have ruled gene-editing is to have all rules of GMO. It is GMO.
We asked the producers what they think about GMO-gene editing. Their answer; It will never happen in Europe.
This is about science and safety; but just as importantly it is about being able to sell our Pork.
Before NPPC begins pushing for GMO-pork maybe surveys should be done to find out who will buy it? Never seen one?
We still expect a major Packer will come out with a Non-GMO label soon. Why wouldn't they? Some packers are claiming no hormones on label already. All Pork is Non-GMO currently. When one labels Non-GMO Pork we expect most will follow.

back to top

South Africa – Government has taken steps to increase local wheat production
26 February – Businesslive.co.za

High production costs, fluctuating commodity prices, climate change and outbreaks of pests and diseases have caused a significant drop in wheat production in SA.
Wheat is the second-most important grain crop produced in SA after maize. However, local production averages 2.3-million tons, far below the levels of consumption. To meet demand, SA imports about 1.7-million tons of wheat annually.
The department of agriculture, forestry & fisheries is concerned about the low levels of local wheat production.
The department "supports wheat producers with technical advice, which includes [that about] cultivar choice, production site selection, soil preparation, cultivation practices, pest and disease control measures, harvesting, as well as post-harvest practices", agriculture minister Senzeni Zokwana said in a written reply to a question from African Christian Democratic Party (ACDP) MP Cheryllyn Dudley.
Dudley had asked the minister whether the government is concerned about the increasing wheat consumption linked to population growth and increasing urbanisation, as local production is continuing to decrease while imports increase annually.
She also asked Zokwana whether the government intends to implement any measures to assist technically with the production of wheat to improve the profit margins and outputs to make it a viable crop to farm.
Zokwana said the Agricultural Research Council is conducting breeding programmes for wheat. The programmes are aimed at developing appropriate and high-yielding cultivars. Focus is also on developing cultivars that are drought tolerant as well as those that are pest and disease resistant.
"Private and public sector stakeholders are also working with the government to increase productivity and competitiveness of the wheat industry. One such initiative is the Wheat Breeding Platform, which aims to serve as a pre-breeding facility which develops suitable varieties at a rapid pace which are then available to industry for further targeted breeding," said Zokwana.
"In addition, a statutory levy was introduced to provide research and technology development funding for open-pollinated cultivars. This will also encourage seed growers to make the latest breeding material available to South African farmers," he said.

back to top

Room for yield growth in Russian wheat, but challenges remain
25 February – World-grain.com

There's no denying the growing importance of Russian wheat, nor the effects of that shift in the world wheat market on U.S. wheat exports, a U.S. Department of Agriculture economist told a breakout session on Driving Forces in Global Trade on Feb. 21 in Washington, D.C.
Russian wheat production had been slowing for decades until it turned higher in 2000-01. In the past 18 years, the country's wheat production has doubled, agricultural economist Andrew Sowell with the USDA's Foreign Agricultural Service told an afternoon audience at USDA's 2019 Agricultural Outlook Forum at Crystal Gateway Marriott in Arlington, Virginia, U.S.
An examination of Russian agriculture trends shows room for even more yield growth in Russia if supported by climate conditions. But the country has continuing challenges, some of which are shared by U.S. producers. They include:
Elevator throughput issues, especially as trains toting grain grow longer.
The majority of Russia's grain storage facilities were built prior to 1960 and the aged facilities slow the transfer of grain. Many Russian barns used to store grain were not designed to do so.
While distance to ports isn't a major issue for winter wheat grown in southern Russia, it's a major challenge for the country's spring wheat areas where sheer land size and time of harvest make it difficult to ship supplies before winter sets in.
Climate challenges and setbacks during winter, sometimes seen in the transport of U.S. wheat, are exacerbated by Russia's proximity to Antarctica. Those challenges severely hamper winter grain movement in Russia.
Increasing consistency of Russian wheat exports in the past decade has been a big part of the country cutting into the importance of U.S. wheat. Russia banned wheat exports in 2010-11 and put an export duty in place in the spring of 2015. Since that time, there have been no outright restrictions or bans despite persistent rumors, including in the past three months.
While the rise of Russian wheat has lowered the importance of U.S. wheat in the global marketplace, global wheat trade has flourished, Sowell said. The most staggering growth has been recorded in Sub-Saharan Africa and Southeast Asia. Changing diets and growing feed use are the biggest contributors to that growth.
Russian wheat has had deleterious effects on U.S. wheat exports as the former moved more and more into markets once dominated by the United States. Nigeria is a prime example, he said. Russia's lower freight-on-board prices have made it the primary wheat supplier to Egypt, a country known typically as a price buyer.
"Even in Mexico, Russia has found a friend," Sowell said of the southern neighbor previously dominated by U.S. and Canadian wheat. While the United States maintains a strong freight advantage and still is Mexico's leading supplier, competitors have taken most of the new growth, especially during years when the origin country's oversupply allows them to overcome freight disadvantages.
This year, the Russian wheat crop "started the year with a boom," Mr. Sowell said, and while rumors of wheat export restrictions abounded, wheat continued to flow. Supplies have tightened and won't equal last year, though, he said. U.S. wheat exports to Nigeria, Mexico and Egypt are likely to improve as Russian wheat declines, Sowell said.

Russia is forecast for another large all-grain, up 3% year over year. While not a direct comparison, the USDA economist noted the projection for U.S. winter wheat is the lowest in 100 years.
As a long-term projection, the USDA sees the U.S. share of global trade continuing to decline, while the projection for Russia is steady.
Full USDA global supply and production data is scheduled to be published in May.

back to top

US maize acreage to rise by 3mn in 2019
22 February – Argusmedia.com

US farmers will plant 3mn more corn acres from last season as the ongoing trade fight with China has shut out domestic soybean output from the largest global customer.
The US Department of Agriculture (USDA) estimates farmers will plant 92mn acres of corn this season, while soybean acreage is projected to shrink by 4.2mn acres to 85mn acres.
US nitrogen fertilizer applications will subsequently rise in the spring, because corn is a high nitrogen consuming crop while very little nitrogen is applied to soybeans.
Argus estimates nitrogen applications should rise by 175,000st unit N to 8.36mn st unit N, while phosphate and potash application rates will likely remain stable at 3.79mn st P_2O_5 and 4.12mn st K_2O because the estimated drop in soybean area offset increased use on corn.
Sulfur consumption across corn and soybeans should also rise by 1.7pc to 350,000st unit S.
Overall nutrient applications are estimated to climb by 1.3pc across corn, soybeans, wheat and cotton to a combined 16.6mn st of nitrogen, phosphates, potash and sulfur.
Expected corn production in 2019 is forecast to climb by 3pc from last season to 14.89bn bushels, marking the second-highest output since the 2016-17 season. Average farm corn prices are estimated to rise by 5¢/bushel to \$3.65/bushel — the highest level in three seasons, if realized.
US soybean exports to China sunk by 90pc, or more than 22mn t, from the start of the trade dispute last summer. The loss of a major export outlet raised beginning stocks this year, which contributed to curbed planting intentions.
But soybean exports are projected to rise by 150mn bushels to 2.03bn bushels in 2019 on lower supplies sourced from Brazil. China committed to purchase an additional 10mn t of US soybeans, secretary of agriculture Sonny Perdue tweeted today. Today's commitment is a follow up from a previous announcement this month, when China sought to purchase 5mn t of US soybeans.

back to top

India’s maize exports becoming unviable and uncompetitive on price
22 February – Business-standard.com

With the price of maize rising, export of the commodity is becoming unviable and uncompetitive. The price of maize, also called corn, has risen 75-80 per cent in the past one year from Rs 12 per kg to Rs 20-21.
As a result, starch and liquid glucose prices have also risen, with starch selling at Rs 31-32 a kg. India’s starch and value-added demand, however, is very good, especially from the pharma and textile sectors.
High input costs are affecting exports, which used to be 15 per cent of the crop — around 2-3 million tonnes — a few years ago. The principal raw material for Indian starch is the non-

genetically modified (GM) market, although potato is also used for starch extraction, albeit to a limited extent.
The production of maize in FY19 is estimated at 29 million tonnes, which was just 22.6 million tonnes in FY16. However, the poultry sector is a big consumer of maize. Around 60 per cent of the maize goes towards poultry and feed segment, while 20-25 per cent is diverted towards production of industrial corn starch.
The domestic starch industry has also voiced concerns over sub-optimal corn supply this season, owing to less-than-normal rainfall last year and the consequent higher corn prices, which could potentially impede growth momentum and also hit exports.
"The corn prices have shot up by almost 40 per cent over the past 3-4 months due to a higher minimum support price (MSP) this season, and crop loss arising out of scanty rainfall," Sahyadri Starch and Industries managing director Vishal Majithia told Business Standard.
Last year, the Centre had increased the MSP for kharif maize by Rs 275 per quintal, or 20 per cent, to Rs 1,700 per quintal for 2018-19, from the Rs 1,425 earlier.
"Higher corn prices have made exports uncompetitive vis-a-vis peers, notably China and Turkey," he said, and claimed exports were already down by 40-50 per cent, which was also affecting the local market sentiment due to the consequent oversupply. The Indian poultry and starch industry is awaiting the permission for duty-free corn imports to supplement demand and provide for unabated production cycle catering the domestic and international markets.
Public sector trader MMTC has already floated a circular among the local players, including starch manufacturers, to apply for corn imports, said Amit Sachdev, the South Asia (India, Bangladesh, and Sri Lanka) representative for the US Grains Council.
Corn imports to the tune of 2,25,000 tonnes was last allowed in 2016 under the tariff rate quota (TRQ) at 0 per cent duty, although the country imposes 60 per cent tax on overseas corn procurement and has the reputation of being corn exporter.
Karnataka, Andhra Pradesh, Tamil Nadu, Rajasthan, Maharashtra, Bihar, Uttar Pradesh, Madhya Pradesh and Gujarat account for 85 per cent of India's maize production.

back to top

Asian millers turn to Argentina for wheat as drought hits Australian output
20 February – Blackseagrain.com

Asian wheat millers are snapping up cargoes of the grain from Argentina to arrive in the first-half of the year, typically peak-export season for traditional supplier Australia where a second year of drought is hitting production.
Large volumes of exports to Asia from Argentina could further chip away at Australia's dominance of the region's wheat supply, which has already been eroded by growing Black Sea shipments over the past few years.
Indonesia, the world's second-largest wheat importer, has booked close to 1 million tonnes of Argentinian wheat for arrival between February and April, while Malaysia and Vietnam have also contracted shipments, according to estimates from two Singapore-based traders who were involved in some of the deals.
"It is for the first time we are seeing such large volumes of wheat coming from Argentina," said one of the traders, who did not want to be identified as he was not authorised to speak to media.
"This is largely because Australia is absent from the market."

Argentinian wheat with 12-pct protein has been traded in Asia at around $255-$265 a tonne, including cost and freight (C&F). That compares with similar quality Australian grain quoted around $300 a tonne C&F to Asia.
Asia is the world's biggest wheat consumer and importer.
Australia's wheat production fell to an 11-year low during the 2018/19 season, the country's chief commodity forecaster said this week, after an east coast drought wilted crops in the world's No. 4 exporter.
Output totalled 17.3 million tonnes, down from 21.24 million tonnes a year earlier, the Australian Bureau of Agricultural and Resource Economics and Sciences said in its final tally for the recently harvested crop.
Chicago wheat prices rose on Wednesday after falling for the last three sessions to their lowest since late October on concerns over poor demand for U.S. supplies.
"We expect wheat from Argentina to dominate in Asia until April or May, after which U.S. wheat will be the key origin supplying wheat," said the second trader.
Argentina is expected to produce 19.20 million tonnes of wheat in the year to June 2019, up from 18.50 million tonnes the year before year and sharply higher than 11.30 million tonnes in 2015/16, according to U.S. Department of Agriculture data.

back to top

Iran's maize need key as Brazil's export, import flow up-ended
20 February – Agrural.com.br

Brazil's position as one of the few exporters prepared to run the gamut of US sanctions and supply corn to Iran is helping to upend the country's export dynamics, as geopolitics, trade fears and economics sees southern states exchange Brazilian corn for Argentine imports.
"The crazy thing is that ports in the states of Rio Grande do Sul and Santa Catarina are exporting corn this month – this is not normal at all," one market source told Agricensus.
The news comes as the same states – which are home to a significant chunk of Brazil's livestock sector – have imported corn from Argentina in recent days, in a move that often reflects Brazil's high domestic prices and poor internal supply logistics.
"The state of Santa Catarina normally buys some corn from Argentina and Paraguay because those countries are close, because Santa Catarina needs more corn than it is able to grow and because it's cheaper to buy corn from those countries," Agrural's Daniele Siqueira told Agricensus.
Santa Catarina is too far south to have a second safrinha crop, where much of Brazil's corn supply comes from, but is too far away from the big producing states of Mato Grosso and Parana to make supply logistics cost effective.
While it is not unusual for Argentina to supply corn to Brazil, the fact that the states are also exporting corn draws together disparate threads of trade war, Iran sanctions, Argentina's record-breaking crop and Brazil's domestic situation.
Line-up data for Brazil's principle ports in Santa Catarina and Rio Grande do Sul – Rio Grande and Imbituba – shows nearly 650,000 mt of corn either loaded, loading or recently sailed.
"Farmers harvest soybeans later in those states and ports don't have much to do right now… (but) they were not supposed to export corn, because their domestic market needs corn," Siqueira said.
While the bulk is bound for Vietnam from Rio Grande, the port is also host to one cargo heading to the Middle East country, while Imbituba's line-up is dominated by corn cargoes to Iran – with 197,122 mt set to sail.

Which is where geopolitics kicks in – Iran has been increasingly reliant upon Brazilian corn supply since US president Donald Trump re-imposed sanctions on the country in December 2018.
That has seen some of the country's auxiliary suppliers – countries such as Ukraine – show a degree of wariness about selling to Iran, fearing a backlash from the US.
That has consolidated Brazil's position as the country's number one corn supplier, and left Iran having to pay a substantial premium to secure supply.
"They are exporting to expensive destinations… the domestic market is equivalent to 120 cents over the March futures contract," a second Brazil-based market source said.
That equates to around $194/mt, at a time when Argentina's FOB Up River price stands at around $167.75/mt, according to Agricensus data – weighed down by expectations of a 46 million mt corn crop that is poised to come to market from March onwards.
While the financial reward is clear, the use of southern ports versus the typical main export hubs of Santos or Paranagua comes down in part to the timing of the soybean harvest and the ongoing strained trade relations between the US and China.
With Brazil's soybeans are harvested as part of the country's first crop, logistics typically switch towards soybeans at this time of the year – but China's ongoing trade impasse with the US has added an extra incentive, and Brazil is gearing up for a big bean export performance.
Again, line-up data shows 89 ships are either waiting to load, loading or have recently sailed from Brazil's main export hub of Santos.
Of these, only two are carrying corn, with 71 of the ships – some 80% – taking soybeans.
That leaves the southern states at a unique crossroads - meeting Iran's supply needs through Brazil's corn exports, while capitalising on competitive Argentine corn to meet its own needs.

back to top

Australia – Lowest grain production in more than 20 years
19 February – Weeklytimesnow.com.au

While Western Australia produced its second-largest winter crop on record last year, other parts of the nation recorded their lowest levels of grain production for more than 20 years, a report out today reveals.
The February Australian crop report, released today by the Australian Bureau of Agricultural and Resource Economics and Sciences, attributed lower yields to drier and warmer than average seasonal conditions during the 2018-19 season.
ABARES acting executive director Peter Gooday said unfavourable conditions ate into planting of dryland summer crops in the latter part of the planting window, while also lowering soil moisture reserves and reducing the yield prospects for dryland crops.
"Total area planted to summer crops is estimated to have decreased by 23 per cent in 2018-19 to around 1 million ha, mainly because of falls in area planted to cotton and rice," Mr Gooday said.
"Production is forecast to fall by 33 per cent to around 2.7 million tonnes."
While WA recorded boosted grain production in the 2018-19 season, crop yields across the rest of the nation are estimated to have fallen well below average.
Winter crop production in WA reached an estimated 17.7 million tonnes for the 2018-19 season, the second largest WA crop on record.
"However, total Australian winter crop production is estimated to have decreased by 20 per cent in 2018-19 to 30.4 million tonnes because of below average yields in the eastern states,"

Mr Gooday said.
“Production of all major winter crops is estimated to have fallen, wheat by 19 per cent to 17.3 million tonnes, barley by 7 per cent to 8.3 million tonnes and canola by 41 per cent to 2.2 million tonnes.”
Total winter crop production in NSW dropped an estimated 60 per cent to about 2.9 million tonnes in the 2018-19 season, the lowest levels since 1994-95.
In Victoria, total winter crop production was estimated to have dropped 51 per cent last season to about 3.7 million tonnes, the lowest since the 2015-16 season.
Australian chick pea production is estimated to have slipped by a whopping 76 per cent to a meagre 281,000 tonnes.
Winter crop area across Australia is estimated to have fallen by 18 per cent in 2018-19 to 18.2 million ha.

back to top

Moroccan wheat market interest Australian operators
14 February – Moroccoworldnews.com

A Moroccan delegation is visiting Australia to examine prospects of importing Australian cereal into the country.
Minister of Agriculture, Maritime Fisheries, Rural Development, and Waters and Forests Aziz Akhannouch, alongside a Moroccan delegation, has visited logistics facilities at the headquarters of GrainCorp, an Australian leader in exporting cereals.
Akhannouch, who has been in Australia since Monday, said that Australian operators have shown great interest in supplying the Moroccan market with their wheat, especially soft wheat.
He added that the Moroccan grain market has high importing potential and particularly interests Australian exporters.
The minister also called on Moroccan operators to consider the Australian experience in the sector as an inspiration through the various components of the value chain.
The president of the Interprofessional Federation of Cereal Activities, Chakib Alj, noted that “the opportunities for cooperation are promising with Australia, especially as the country-continent faces the same climate challenges.”
For Alj, the visit allowed a close look at the Australian experience to consider how to improve cereal production in Morocco and to examine the prospects of importing Australian cereals into the country. Morocco imports nearly 6.5 million tons of cereals a year.
He further explained that Morocco can import Australian wheat at a favorable price given that Australia has a staggered crop compared to other countries, which puts suppliers under pressure to sell their crop.
For his part, GrainCorp’s general manager, Don Campbell, said his company is interested in the Moroccan market, particularly in the soft wheat sector which is the core of the wheat sector in Morocco.
morning in Punjab, Haryana, Chandigarh, Delhi, West Rajasthan and West Uttar Pradesh.

back to top

Reports

The State of the World's Biodiversity for Food and Agriculture - FAO

Based on information provided by 91 countries and 27 international organizations, analysis of global literature and datasets, and contributions from over 175 authors and reviewers, The State of the World's Biodiversity for Food and Agriculture assesses biodiversity for food and agriculture and its management worldwide.

Le Déméter 2019 - IRIS

Mondialisation des échanges, urbanisation, instabilités géopolitiques, développement durable, logistique et e-commerce, innovations technologiques, formations des nouvelles générations, etc. : les grandes équations stratégiques de la sécurité alimentaire, de la production agricole et de la consommation en France et dans le monde se font toujours plus complexes. Le Déméter 2019 propose une série d'analyses prospectives sur ces transformations et leurs conséquences sur les agricultures, les systèmes alimentaires et les ruralités. Les contributions à cette 25e édition du Déméter offrent des grilles de lecture pour comprendre ces recompositions et les trajectoires agricoles prises en Europe et en France, ainsi que l'émergence de puissances agricoles à travers le monde.

back to top

Monthly Information Sources

AMIS Market Monitor

FAO Cereal Supply and Demand Brief - FAO

Grain Market Report – IGC

Oilcrops Monthly Price and Policy Update – FAO

Crop Monitoring in Europe - European Commission

FAO Rice Price Update – FAO

World Agricultural Supply and Demand Estimates – USDA

Early Warning Crop Monitor – GEOGLAM

Commodity Price Data - World Bank

Food Price Monitoring and Analysis (FPMA) – FAO

GIEWS Country Briefs - FAO

back to top

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The MNRs are sent electronically on the last working day of the month except in July and December.

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www.fao.org/economic/est