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Market News

EU countries approve deal to overhaul farming subsidies

28 Jun – Usnews.com

European Union countries on Monday gave the green light to reforms of the bloc's huge farming subsidy programme, after a three-year battle over rules to make it greener and support smaller farms.
Negotiators representing the EU's 27 countries and European Parliament struck the deal on Friday to reform the Common Agricultural Policy (CAP), which will spend 387 billion euros ($462 billion) on payments to farmers and rural development, roughly a third of the EU's 2021-2027 budget.
"This deal is essential to ensure that this CAP enables the transition towards sustainable agriculture," EU agriculture commissioner Janusz Wojciechowski said on Monday, at a meeting where EU agriculture ministers approved the deal. The new rules apply from 2023.
Europe's farmers are already facing climate change impacts like drought, but agriculture is also the main pressure on Europe's natural habitats and produces 10% of EU greenhouse gas emissions.
The new CAP will require countries to spend 20% of payments to farmers from 2023-2024, and 25% between 2025-2027, on "eco-schemes" that protect the environment. It does not define an eco-scheme, but examples could include restoring wetlands to absorb CO_2, or organic farming.
The Commission will assess whether countries' plans for spending CAP funds comply with EU environment laws, including the bloc's recently-agreed target to cut emissions faster this decade.
Campaigners and some EU lawmakers said key environmental protections in the deal were weak or voluntary. Parliament, which pushed for more spending on eco-schemes and restrictions on subsidies for large businesses, will vote on the deal in the coming months.
EU countries must redistribute at least 10% of CAP funds to smaller farms, although they can dodge this requirement by using other methods to distribute funds fairly.
The deal also earmarks money for young farmers and creates a 450 million euro crisis fund in case agricultural markets are disrupted by an emergency such as a pandemic.

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Russia stumbles in bid to fight global price surge with duties

28 Jun – Bloomberg.com

Russia’s answer to the surge in global commodity prices has been a mass experiment with duties, export curbs and price controls.
It’s not working. Inflation has spiked to the highest level in four years and even officials admit relief is months away at best.
Steel, nickel, aluminum and copper last week joined the long list of goods that are subject to export duties as Vladimir Putin seeks to soften the burden on consumers. Since Putin first ordered the government to do something about surging prices late last year, restrictions have spread from wheat to cooking oil to sugar and the key Russian staple buckwheat.
Rising food costs in Russia contribute to inflation spike
With polls showing inflation is a top concern, the Kremlin needs to show it’s trying to get the problem under control, even if its roots are in a global raw materials rally that Russia can’t do much about. But as more and more duties are added, risks are rising that the measures

could end up undermining central bank policy and Russia’s dominance in global commodity markets.
“It’s a populist approach that’s aimed at creating an illusion of control over prices and social assistance,” said Elina Ribakova, deputy chief economist at the International Institute of Finance in Washington. “Taken to the extreme they risk contaminating price indexes and making monetary policy less effective.”
Bank of Russia Governor Elvira Nabiullina is already struggling to control inflation that recently surged above 6%. The central bank has increased interest rates by 125 basis points since March and warned that more monetary tightening will be necessary as soon as next month as price increases veer out of control.
Duties and controls on key food staples have shaved about 20 basis points off inflation this year, Nabiullina said at a news briefing in April. She has warned repeatedly that such measures can only ever be effective in the short term, and may increase inflationary pressures in the longer term due to shortages and increased trading on the black market.
“The spike in inflation has been broad based, with the ruble’s depreciation last year helping to magnify shocks from the pandemic. It’s not surprising that price controls have had a limited effect.”
The government, which is already facing discontent over a drop in incomes, insists the tariffs are necessary to protect consumers. Putin said last month that new measures need to be taken “promptly” to avoid price volatility on “socially-significant” goods. Discussions have already started about steps to curb a rise in the cost of fertilizers, with suggestions including freezing domestic prices and imposing a floating duty.
“Our economy just isn’t ready for the kind of avalanche-like shock that we’ve witnessed in the past year,” First Deputy Prime Minister Andrey Belousov said last week after the new metals tariffs were introduced.
Analysts at state-owned VTB Capital in Moscow point to a softening of prices for some foodstuffs to show that the measures are working. They also note that inflation is accelerating much faster in Brazil, which hasn’t implemented price controls, than in Russia, though that could be attributable to other factors, such as a severe drought.
Brazil has responded to the price surge by ramping up interest rates. Argentina has imposed restrictions on beef exports and Ukraine has implemented some soft restrictions on sunflower oil exports. China has started selling some of its vast metal reserves in a bid to cool global prices.
Russia consumes just 10% of the nickel, one third of the aluminum and about a half of the steel it produces, so the latest measures won’t have much impact on overall inflation, according to analysts at BCS Global Markets in Moscow. A spokeswoman for NLMK PJSC, Russia’s biggest steel producer, warned tariffs will deny investment plans of low-margin producers, which could end up hurting consumers via their incomes.

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COVID-19, ASF draws down Philippine feed demand
25 Jun – World-grain.com

The COVID-19 pandemic and African swine fever (ASF) continue to hamper the Philippines’ feed demand along with an expected drop in maize production, according to a Global Agricultural Information Network (GAIN) report from the US Department of Agriculture (USDA).
The Philippines’ maize production is anticipated to slip 3.6% in the 2021-22 marketing year to 8 million tonnes compared to 8.3 million in the previous year. The USDA attributes the

decline to anticipated return to normal weather patterns such as typhoons. Demand for maize feed remains low as poultry production slips due to the spread of COVID-19. Hog production is not expected to rebound in 2021-22 as ASF continues to take its toll on the domestic hog herd. The USDA estimates maize imports to total 500,000 tonnes in the 2021-22 marketing year.

Unlike maize, the country's rice production is expected to hit near record highs. The USDA raised its rice production estimate for the 2021-22 marketing year 100,000 tonnes to 12.4 million based on the adoption of improved varieties through the hybrid rice program. The forecast for Philippine rice imports remains unchanged at 2.1 million tonnes in the 2021-22 marketing year.

Prolonged COVID-19 quarantine measures have decreased feed wheat and wheat-based product demand, lowering the USDA's wheat import forecast by 400,000 tonnes to 6.4 million tonnes in the 2021-22 marketing year.

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Brazil maize harvest forecast drops over eight percent

23 Jun – Newsdakota.com

Brazilian farmers will harvest just under 94 million tons of maize this season.

A Reuters poll of ten harvest forecasters indicates a fall of 8.5 percent from the last forecast due to a severe drought. Second-crop maize failure will lead to higher imports and lower exports of the crop. The forecasters say Brazil, home to some of the world's largest meat processors, will need to keep the grain to make it livestock feed. One agribusiness consultant cut her maize export forecast to 22.5 million tons, down from a previous prediction of 32 million tons, and told Reuters she estimates Brazilian maize import needs may reach four million tons. If the dry weather persists, maize yields may fall even further in some of the key maize-producing states in Brazil.

In April, a Reuters poll of 11 forecasters predicted a record maize crop of 107 million tons, but poor weather during the development stage damaged that prospect. Brazil's second-maize crop, which gets planted after the country's soybeans get harvested at the end of Brazil's summertime, has been hit hardest by a lack of rainfall.

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Argentina expects a 19 million tonnes 2021/22 wheat harvest, with 12 million tonnes for export

23 Jun – MercoPress.com

Argentine wheat exports should reach 12 million tons in the 2021/22 winter harvest, according to a new estimate released by the Buenos Aires Cereals Exchange. If confirmed, the volume, the highest since 2016/17, will be 26.3% above this season's production.

The increase is mainly due to the expectation of production growth, projected at 19.15 million tons, compared to 17 million in 2020/21. In this scenario, the internal wheat milling should also grow in 2021/22, by 8.3%, and reach 6.5 million tons. This also means the country will have a larger than usual surplus for export.

Also according to the Buenos Aires Cereals Exchange, maize shipments from Argentina totaled 36.26 million tons in the 2019/20 cycle, down 3% compared to the previous crop year. Grain processing for bio-fuel production also contracted, from 1.55 million tons in 2018/19, to 1.1 million tons in the season just ended. This was mainly because of import tariffs controversies with the EU and the US.

Argentina also destined an additional 1.3 million tons of maize for animal feed, and the total volume reached 11.8 million tons. Argentina produced 51.5 million tons of maize in the 2019/20 harvest. The market's initial estimate for Argentine maize exports in 2020/21 is 33 million tons from a harvest of 48 million tons. Brazil has become a major buyer of Argentine maize to feed its rodeo, pig industry and poultry since the country has been ravaged by drought.

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Food supply success in pandemic belies wasteful farm policies - OECD

22 Jun – Reuters.com

Emergency measures by governments helped keep food supply functioning during the COVID-19 pandemic, but agricultural policies continue to pour out subsidies inefficiently without encouraging sustainable production, the OECD said on Tuesday.

As coronavirus spread last year, countries took various steps including the creation of so-called green lanes for cross-border food transport and increased food aid for households, the Organisation for Economic Co-operation and Development said.

"As a result, policies were generally successful in maintaining the overall functioning of food supply chains, albeit within an overall structure of agricultural support programmes that showed little change," the OECD said in an annual survey of farming policy.

Reviewing 54 advanced and emerging economies, the Paris-based organisation estimated that a total of $720 billion per year was transferred to agriculture over the 2018-2020 period.

Three-quarters of this support was in aid for farmers, most of which was through what the OECD sees as market-distorting instruments like price controls or production subsidies.

Only about 14% of total support for the farm sector went towards structural areas like research and development, the OECD said.

Support rewarding environmental services was relatively marginal, with just $1.5 billion out of $268 billion per year in budgetary payments to producers clearly tied to such services, it estimated.

"Overall, most current support policies are not serving the wider needs of food systems," the OECD said.

The OECD study echoed criticisms by the European Court of Auditors in a report on Monday that the European Union's huge farm subsidy programme is failing to rein in greenhouse gas emissions.

The OECD recognised that crop technology has allowed a reduction in the intensity of resource use, with global food production having grown much faster than consumption of land or inputs like fertiliser.

But many subsidies could be redirected towards innovation or environmental services to curb emissions and other negative environmental effects of agriculture, it added.

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Viet Nam emerges as an important barley market

14 Jun – Farmweekly.com.au

Viet Nam is emerging as a valuable market for Australian feed barley, buying over double the amount of Australian product this marketing year compared to the previous year.

So far, according to US Department of Agriculture data Australia is on track to export 500,000 tonnes of barley to Vietnam for the 2020-21 marketing year, up from 200,000 the previous year.

And demand has been going gangbusters since last harvest's crop was available in December last year, with Australian Bureau of Statistics data showing over 50,000 tonnes of barley has left Aussie shores for Vietnam each month since December up until the most recent figures from April.

Australian Export Grains Innovation Centre barley markets manager Mary Raynes said while the increased trade with Vietnam was not enough to make up for the loss of the Chinese market it was a positive development.

Ms Raynes said Vietnam was likely to continue to emerge to be a significant buyer of feed grain, with a large pork industry and a growing dairy market.

"Vietnam is the world's fifth largest producer of pork and their pig herd is up to 85 per cent of what is was before African Swine Fever hit, with 26 million pigs, producing 3.6 million tonnes of pork a year," Ms Raynes said.

Ms Raynes also said the dairy herd was growing and would provide another opportunity for Australia.

However, she cautioned that Vietnam was a price sensitive market and that the current situation, where Australian barley is some of the cheapest feed grain in the world, would not always be the case

AgScientia grains industry analyst Lloyd George said he expected the Vietnamese demand to continue.

"Australian barley is very well priced compared to other feed grain and that dynamic does not look like changing in the short-term," Mr George said.

"The Vietnamese have figured out how to use Australian barley in the ration better and that allows them to buy more of the more affordable grain," he said.

Ms Raynes said Australia's technical support had been critical in winning over the Vietnamese feed industry.

She said a recent webinar with Vietnamese customers, traditionally more comfortable using maize and soymeal as a feedstock, highlighted the desire to learn more about using barley.

"The webinar attendees really valued learning more about the practical aspects of how to incorporate Australian feed grains into animal diets," she said.

Mr George said breakthroughs in animal nutrition meant there could be more barley included in rations.

"You've seen feeders that could previously just top up with a little barley, up to 7pc or so, getting up to 40pc, so it is like an entire new market opening up for barley just with that better understanding of how to work with it," he said.

Ms Raynes said Vietnamese customers were learning how to best process barley.

"A lot depends on their mill set-up as to how they go about using the product," she said.

A positive for Australia is the trend in Vietnam towards larger intensive livestock businesses more interested in importing grain.

"Years ago many of the pigs were owned by families who fed them household scraps and small amounts of grain, now many pigs are reared as part of larger businesses," Ms Raynes said.

She said the dairy industry was slightly different, with the focus still on smaller farms.

However, she said it was a growing area and that AEGIC was providing information to Vietnamese dairy farmers on using Aussie barley.

"For both the dairy and pork industries it just comes down to providing that technical information, allowing them to be comfortable to change over from what they've used in the past."

She said a key plus for Australia was the quality of our grain.

"It's clean, its low moisture and it has a good colour that does not change the colour of the meat, all of which are positives."

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Australia raises wheat forecast by 11 percent after wet Autumn

8 Jun – Agriculture.com

Australia on Tuesday raised its wheat production forecast during the 2021/22 season by 11.2% from a forecast three months ago after rains across several major growing regions improved the prospects for yields.

The Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES) said it now expects production during the season ending June 30, 2022 to total 27.8 million tonnes. The bureau's previous forecast in March had been 25 million tonnes.

"Yield prospects in most cropping regions in New South Wales, Western Australia and much of Queensland are very favourable given the favourable conditions at the beginning of the winter crop season and the outlook for winter rainfall," said Jared Greenville, acting executive director of ABARES.

While the rains across Australia's east coast has aided grain production, it has also led to a so-called mouse plague that has destroyed some acreage.

ABARES, however, said recent cold weather will relieve the plight on farmers.

Early indicators are that mouse numbers have peaked in most regions as cold and wet winter conditions slow breeding rates," said Greenville.

A bumper Australian wheat harvest is likely to ease supply concerns among key importers in Asia and the Middle East.

Benchmark Chicago Board of Trade wheat futures in April rallied to their highest since 2013, and are up around 30% from a year ago.

Meanwhile, ABARES also lifted its forecast for barley and canola production.

Barley production is now expected to total 10.4 million tonnes - up from its March estimate of 8.8 million tonnes.

Australian growers are expected to harvest 4.2 million tonnes of canola, up from the 3.5 million tonnes forecast in March.

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Memorandum lifts outlook for Ukrainian wheat to China

7 Jun – Argusmedia.com

The memorandum follows a surge in China's grains consumption demand this year and efforts to diversify its supply chain because of ongoing trade tensions with its traditional grain supplier, Australia.

Ukraine has benefited from these tensions, already upping its barley shipments to China to 2.8mn t this year, from less than 1mn t a year earlier. The country now accounts for more than two-thirds of China's 2020-21 barley imports, with China applying an import duty on Australian barley and refusing to purchase the crop this season.

Meanwhile, Ukraine government data show maize shipments to China have risen to 7.34mn t October-April, from 5.5mn t shipped during the full October-September period a year earlier, with strong Chinese feed demand from a resurging swine-breeding sector largely ignoring multi-year highs in fob Ukraine maize prices.

"The memorandum between UGA and CASME could further accelerate Ukraine's grains exports to China by two or three times, and open China's market for Ukrainian wheat and

sorghum once the relevant interstate phytosanitary protocols are agreed," president of UGA Mykola Gorbachev said.
The memorandum includes an agreement to establish a Chinese-Ukrainian council for international co-operation to implement joint agricultural projects, which will aim to develop modern agricultural trade, as well as joint industrial parks.
Ukraine's wheat exporters are well placed to cover a larger share of China's purchases next year, with the US Department of Agriculture's Foreign Agricultural Service (USDA FAS) projecting Ukraine's exports of the crop rising to 18.5mn t for 2021-22, up by 3mn t a year earlier from stronger domestic production.
China has already diversified its wheat imports away from Australia this year, and secured most of its June-May deliveries from Canada and the US — at 33pc and 28pc, respectively. Last year, Australia was among China's top two suppliers, while the US accounted for less than 5pc of its wheat receipts.
Next year, China's wheat imports are projected at 10mn t, down by 500,000t on 2020-21, but still outpacing 2019-20 by 4.72mn t, as buyers seek to replenish thin inventory levels despite higher domestic production, according to latest data from the USDA's World Agricultural Supply and Demand Estimates report.

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Bumper maize crop for South African farmers

1 Jun – Graincentral.com

South African maize farmers are cashing in on heightened global demand, substantially increasing exports on the back of their second consecutive bumper harvest. The crop had an excellent start with widespread rains in October and November 2020, facilitating a timely plant and then favourable late-season weather conditions boosted final yields.
Harvest in the east of the country has been under way for some weeks, with the later western areas about to move into full gear. Dryness across much of the country in late May has benefited harvest progress and crop quality. All going well, headers will all be parked up by the end of June.
South Africa’s Crop Estimates Committee (CEC) is forecasting production at 16.18 million tonnes (Mt), up 5.8 per cent from the 15.3Mt harvested last season. The updated estimate is marginally higher than the CEC’s April forecast of 16.1Mt, and was at the low end of industry expectations. It will be the second-biggest commercial maize crop on record behind the 17.55Mt produced in the 2016-17 season, relegating last year’s crop to third place.
The total area planted to commercial maize in 2020 was 2.76 million hectares (Mha), around 5pc higher than the 2019 program. At planting time last year, domestic maize prices in South Africa were trading around 30pc higher than they were in late 2019, providing growers with an attractive incentive to increase plantings year on year.
Maize prices decreased moderately between January and April this year, primarily driven by the favourable domestic supply conditions. The downward pressure more than outweighed the effects of the high international prices and a weakening of the national currency.
Around 61.4pc, or 1.69Mha, was planted to white maize, and 38.6pc, or 1.06Mha, planted to yellow maize. With an average yield of 5.31c tonnes per hectare, white maize production is expected to be 8.98Mt, or 55.5pc of the total crop. The average yellow maize yield is higher at 6.77t/ha,
with output at 7.2Mt, or 44.5pc of total output. If realised, it would be the largest ever yellow maize crop.

Non-commercial, or subsistence, maize production is forecast at almost 587,000t, up 7.9pc from just under 544,000t last season. The area is also up sharply to more than 319,000ha, 7.4pc higher than the 297,000 hectares planted in 2019. Maize produced by subsistence farmers is generally consumed by humans or animals on the producing farm and doesn't make its way into the domestic or export supply chain.

Like so many countries globally, the COVID-19 pandemic has hit the South African economy very hard. Economic growth has been on a downward trend for the past ten years. With unemployment above 30pc and the COVID-19 challenges, it is expected to remain sluggish for the foreseeable future.

Consumption of maize in South Africa has increased by an average of more than 2pc per annum over the past 10 years, powered by an increase in demand from both the human-consumption and animal-feed sectors. Domestic demand in the 2021-22 (May-April) marketing year is expected to be around 11.7Mt, with white maize at 6.45Mt (55pc) and yellow maize at 5.25Mt (45pc).

In the form of a meal known as mielie or maize pap, white maize is the staple food for many South African consumers, especially for lower-income households, as it is a relatively inexpensive source of carbohydrates. The grain is mixed with water until a smooth porridge-like consistency is achieved. It can be enjoyed for breakfast as a sweet porridge, or made firmer for lunch and dinner and served with vegetables or meat.

On the other hand, yellow maize is the primary ingredient for stockfeed rations, particularly in the poultry sector. Intake of chicken meat has increased substantially as it is the cheapest, and now the most important, source of protein in the South African diet. Higher chicken-meat demand has driven considerable expansion in the local broiler industry in recent years, manifesting itself in burgeoning domestic demand for yellow maize.

The jump in domestic production and relative competitiveness on the international stage is expected to see South Africa's maize exports surge by 40pc to 3.5Mt in the 2021-22 marketing year. That follows a 72pc increase to 2.5Mt in the marketing year just concluded. High international prices have helped push domestic values above export parity, increasing the incentive to export the country's production surplus.

South Africa is well placed to supply neighbours in southern Africa. Zimbabwe, Botswana, Namibia, Mozambique and Eswatini all share a border with South Africa and are established destinations. However, they are also expected to have above-average production this year, thereby reducing imports.

Consequently, deep-sea exports to traditional Asian buyers such as South Korea, Taiwan, Japan and Vietnam, and possibly some Mediterranean destinations, are expected to figure more prominently in export bookings ahead of the Northern Hemisphere harvest later this year.

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Reports

Food Outlook – FAO

Against the background of fast expanding trade and a surge in food import bills, which has come to characterise much of developments shaping global food markets in 2020/21, early forecasts for 2021/22 point to resilient food trade and a continuation of strong international prices amidst many supply and demand uncertainties.
This report provides supply and demand forecasts for basic foodstuffs, fish and fishery products along with price analysis and policy information. The report's special feature of this report puts recent trends in global food trade under the spotlight, with particular focus on how commodity flows have measured-up during the COVID-19 pandemic. Contrary to widespread predictions of a collapse in global markets, recent data show that trade continues to reach new heights. A novel metric is introduced that better captures the price momentum underway in international markets.

Global Economic Prospects- A strong but Uneven Recovery – World Bank

The global economy is set to expand 5.6 percent in 2021—its strongest post-recession pace in 80 years. This recovery is uneven and largely reflects sharp rebounds in some major economies. In many emerging market and developing economies (EMDEs), obstacles to vaccination continue to weigh on activity. By 2022, last year's per capita income losses will not be fully unwound in about two-thirds of EMDEs. The global outlook remains subject to significant downside risks, including the possibility of additional COVID-19 waves and financial stress amid high EMDE debt levels. Policy makers will need to balance the need to support the recovery while safeguarding price stability and fiscal sustainability and to continue efforts toward promoting growth-enhancing reforms.

Agricultural Policy Monitoring and Evaluation 2021 – Addressing the Challenges Facing Food Systems - OECD

This annual report monitors and evaluates agricultural policies in 54 countries, including the 38 OECD countries, the five non-OECD EU Member States, and 11 emerging economies. The report includes country specific analysis based on up-to-date estimates of support to agriculture that are compiled using a comprehensive system of measurement and classification – the Producer and Consumer Support Estimates (PSE and CSE) and related indicators. This year's report focuses on policy responses to the COVID-19 pandemic and analyses the implications of agricultural support policies for the performance of food systems.

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