

MONTHLY NEWS REPORT ON GRAINS

FAO Trade and Markets Division

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Market News

Kazakhstan to impose the quotas for wheat and flour exports

30 March - APK

In April 2020, Kazakhstan will impose the quotas for export shipments of wheat and wheat flour. The reporting decision was made during the meeting of the Cabinet of Ministers of Kazakhstan, on March 30.

According to preliminary information, the quota volumes in April will total 200 thsd tonnes of wheat, and 70 thsd tonnes of wheat flour.

The authorities will fix the volumes by the corresponding memoranda, which the Ministry of Agriculture will sign in the coming days with the Grain Union of Kazakhstan, the Union of Grain Processors and Bakers, NC Food Contract Corporation JSC, local administrations of oblasts, etc.

As a reminder, to date the authorities do not limit the volumes of wheat exports from Kazakhstan. At the same time, since March 22 the country completely banned the foreign shipments of wheat flour.

For the first 8 months (July-February) of 2019/20 MY, Kazakhstan already exported 2.8 mln tonnes of wheat and 988 thsd tonnes of wheat flour.

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Ukraine traders agree wheat export curb to protect bread prices

30 March – BusinessRecord.com

Ukraine's biggest grain traders agreed on Monday to an economy ministry proposal to limit wheat exports to 20.2 million tonnes in the 2019/20 season to avoid a rise in domestic bread prices.

Although Ukraine is a major grain exporter and its harvest largely exceeds domestic consumption, the coronavirus pandemic has led some countries to consider feed export restrictions.

Ukrainian bakers and millers last week asked the government to limit exports of grain and related products to maintain bread prices in the event of the coronavirus spreading.

The economy ministry said it would control wheat export shipments, sell flour in the domestic market and agree with traders a maximum volume of wheat for export.

Ukraine has exported around 18 million tonnes of wheat so far this season.

“(The remaining volume of) 2.2 million tonnes for export in April-June ... is absolutely typical for Ukraine in the last months of the season and does not bear any food security risks,” the UGA traders union said in a statement.

Ukraine has increased its grain exports by more than 20pc to around 45.4 million tonnes for the 2019/20 July-June season.

It plans to export a record 52-55 million tonnes of grain this season, according to an economy ministry forecast.

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Russia proposes grain export quota of 7 million tonnes for April-June

30 March - Platts

The Russian government on Friday proposed a quota of 7 million mt for export of grains, comprising wheat, corn, barley and rye, for April to-June in order to stabilize the domestic market.

The government did not give the division for the quota for different grains.

The proposal of grain export quota from the world's largest wheat exporter comes in the wake of the coronavirus pandemic disrupting food supply chains around the world.

"As an immediate effect, the decision may lead to higher FOB prices [export prices on free on board basis] for wheat as Russia is one of the main suppliers," said Victoria Sinitsyna, grains analyst with Platts Analytics.

A similar view was given by Elena Neroba, market analyst at Maxigrain. "Though 7 million mt for grains for April-June is along expected lines, prices could still rise on hysteria," she said.

Data from the Russian Federal Service for Veterinary and Phytosanitary Surveillance shows in the marketing year started July, Russia has exported 27.4 million mt of wheat as of March 17, against the estimate of 35 million mt for 2019-20 given by the US Department of Agriculture. Platts Analytics estimates Russian wheat exports for 2019-20 at 34.2 million mt and that of corn at 5.4 million mt.

Corn exports from Russia from start of the marketing year and March 17 stood at 2.7 million mt.

The set of proposed measures will guarantee the necessary volume of grain in the domestic market, prevent a spike in prices for the main crops, as well as consumer prices for the final products of the flour, cereal, baking and meat and dairy industries, said Agriculture Minister Dmitry Patrushev.

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Bullish grain forecast for South Africa will help 'tame' food inflation

30 March – Farmersweekly.co.za

The Crop Estimate's Committee (CEC) has revised the expected commercial maize crop for 2020 up another 1,7% to over 14,8 million tons.

The CEC released its area estimate and second production forecast for summer crops just prior to the 21-day national lockdown, which began on 27 March, and was aimed at containing the spread of the coronavirus disease (COVID-19).

The area estimate for maize was increased to over 2,6 million hectares, with an expected yield of 5,67t/ha, while the total maize volume was expected to be 31% greater than in 2019. "The three main maize-producing areas, namely the Free State, Mpumalanga and North West, are expected to produce 83% of the 2020 crop," the CEC said.

The committee estimated that white maize production would amount to about 8,5 million tons, with yellow maize production just below 6,3 million tons.

Paul Makube, senior agricultural economist at FNB Agri-Business, said in a statement that "bullish grain supplies" would "help tame food inflation".

Looking at the total grain and oilseed basket, Makube said the CEC estimated that total production would reach 17,07 million tons, which was 1,8% up on its previous forecast.

"The season so far has progressed well and all indications are that we are going to finish the year on a positive note. This is not only a good development from a GDP perspective, [but] this bullish supply outlook will [also] help tame food inflation despite upward pressure from the weaker rand," Makube said.

According to the CEC, the expectation for sunflower production was up nearly 4,6% at over 730 000t, the soya bean production estimate was more than 2% higher at about 1,27 million tons, and groundnut production was over 3% higher at about 56 000t.

The CEC left its dry bean forecast unchanged at just under 73 000t, while the sorghum forecast was revised down nearly 1,7% to around 133 000t.

The CEC was scheduled to release its third production estimate for the 2020 season on 29 April.

Meanwhile, the maize market continued to perform well. Grain SA said in its morning market commentary report on Monday that local maize contracts had “experienced a very exciting day” on Friday (27 March) and had all closed in the green.

The association’s data indicated that the spot price of white maize on 27 March was R3 253/t, and R2 690/t for yellow maize.

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US – Grains push higher on demand

29 March - AGWeek

Technical buying stepped in to help push the grains higher the fourth week of March. Strong export demand as confirmation of Chinese purchases helped to give the market strength. Could this be the start of the phase one purchases, or is the buying tied to the reports of shipping issues in South America? Ports in Argentina are closed because of coronavirus issues while Brazil’s ports are not running at full speed because of logistical problems, not only due to reduced labor force but also due to the slowdown in grain movement.

South America’s problems are turning out to be U.S.’s gain as importers of corn and soybeans are likely going to have to come to the U.S. to get their needs met. And with the recent sell off in the U.S. grains, they should be anyway. The sharp increase in the dollar has offset some of the price reduction, but even the U.S. dollar is under pressure to help encourage buying of U.S. products.

The increase in exports has helped to push May-Chicago wheat 91 cents from its recent low. May soybeans have improved 75 cents. The disappointing corn market has only seen 18 cent gains from its low.

The market performance has been nothing but disappointing this year. The grains were hammered in January and February, with September Minneapolis dropping 39 cents, July Chicago losing 37 cents, July Kansas City dropping 41 cents, December corn giving back 25 cents, and November soybeans fading 60 cents. Seasonally, the grains should be starting to see some strength, but the coronavirus has put too much uncertainty into the marketplace. In the second half of March, the grains are trying to divorce themselves from the coronavirus concerns and concentrate on recent demand spikes. The fact that China was in and buying wheat, corn, and soybeans is a good sign. But the fact that we are likely the only game in town might have been more the reason than anything. Argentina has shut down their ports in an attempt to get ahead of the coronavirus, which means the U.S. now becomes the main supplier of soybean meal to the world. This is why soybean meal had been the market leader up to this point. It is also why the funds have switched from being net short meal to now be net long.

Exports in Brazil and Argentina are extremely labor intensive. It takes a lot of human involvement to get grain from the fields to the shipping ports. In the U.S., exports are more automated. The recent virus outbreak has slowed the timetable for exports in South America but it has not resulted in adjustments in the U.S.

Strong domestic demand continues to support the wheat complex as domestic millers try to gear up to keep up with the spike in bread demand. In times of crises, people respond by hoarding certain products. Bread is one of those and because of the virus, grocery stores are unable to keep bread on the shelves. It only took a pandemic to help increase wheat demand.

Production concerns are starting to stack up in wheat's favor as well. European Union and Black Sea regions are seeing weather issues as well as the U.S. Southern Plains. The western regions of the Southern Plains remain dry while the Delta and southern Midwest continues to get saturated with rain. The expectations that spring wheat acreage could be lower is adding to the strength.

Corn continues to struggle. It was good to see China buying, but most traders took the export news in stride because of the expected decrease in ethanol demand. Ethanol prices have been hit hard on lack of demand because of the coronavirus.

The lack of demand along with Saudi Arabia's and Russia's increase in production is starting to result in an increase in stocks. Reuters reported Trump has agreed to intervene to try to get Russia and Saudi Arabia to stop their production wars against each other. Expectations of increased 2020 planted corn acreage added to the lackluster performance. It is very likely that the Prospective Plantings report will show higher intended corn acreage, but it probably won't be the reality.

Soybeans are seeing spill-over support from the sharply higher soybean meal market.

Expectations that 2020 planted soybean acreage could be less than expected is adding to the strength in soybeans. In addition, if China wants just in time inventory shipments of soybeans, the only destination that can accomplish that is the U.S.

The market has been seeing estimates for the March 31 Prospective Planted Acreage report and Quarterly Grain Stocks:

Wheat stocks: 1.43 billion bushels versus 1.593 billion bushels last year

All wheat acreage: 44.98 million versus 45 million in the Ag Outlook Forum, 45.16 million last year.

Spring wheat acreage: 12.63 million versus 12.66 million last year.

Corn stocks: 8.125 billion bushels versus 8.613 billion bushels last year

Corn acreage: 94.33 million versus 94 million in the Ag Outlook Forum and versus 89.7 million last year.

Soybean stocks: 2.24 billion bushels versus 2.73 billion bushels last year

Soybean acreage 84.87 million versus 85 million from the Ag Outlook Forum and 76.1 million last year. Producers should continue to be patient on marketing product. Another 20 to 30 cent push would have had the grains at sellable levels, but it is likely we won't see those levels until we get deeper into the 2020 planting season.

The third virus aid bill has made its way through the Senate and House. The price tag of the third round is up to \$2 trillion.

The aid package will be very critical to the U.S. economy as at this point, 23 million jobs are in jeopardy of being lost because of the economic slowdown. The jobless report was just a sign of what is to come as last Thursday's report showed the largest number of jobless claims in U.S. history (over 3 million).

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IGC forecasts record world grains crop in 2020/21

27 March – Leaderpost.com

The International Grains Council (IGC) on Thursday forecast record world grains production in the 2020/21 season while warning projections were tentative until the progress and duration of the coronavirus pandemic becomes clearer.

The inter-governmental body, in its first full assessment of the 2020/21 season, projected world grains production would rise to a record 2.22 billion tonnes, up 2% from the prior season.

Transport restrictions related to the pandemic could hamper the distribution of farm supplies such as seeds and fertilizers and disrupt spring fieldwork, the IGC said in a monthly update. However, at this stage it is assuming planting intentions will be fulfilled, it added.

A modest decline in global grains stocks was forecast despite record production, with consumption seen rising to 2.23 billion tonnes, up from the prior season's 2.19 billion.

"While some commodities have seen a sharp upturn in nearby demand, especially for rice and wheat-based foods, weakening economic conditions could dampen usage in the longer term, particularly for industrial products such as maize-based ethanol and starch," the IGC said.

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Global corn (maize) production was seen rising to 1.16 billion tonnes, up from the prior season's 1.12 billion, but still below consumption of 1.17 billion.

The council put 2020/21 world wheat production at 768 million tonnes, up from the prior season's 763 million and above consumption which was seen at 760 million.

"Wheat stocks are predicted at an all-time high, led by expansions in China and India," the IGC said.

A rise in global soybean production was projected to 366 million tonnes from the prior season's 341 million, boosted by an expected increase in U.S. acreage.

"While (soybean) stocks may edge up, they are likely to remain tight on low carry-ins and an uptick in demand," the report said.

Global rice production in 2020/21 was seen rising to 509 million tonnes, up from the prior season's 499 million, led by acreage increases in major exporters.

"Further gains in (rice) inventories are anticipated, mainly in key exporters and China," the IGC said.

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Brazil deems truck stops 'essential' to keep grains flowing despite coronavirus

27 March – Reuters.com

Brazil's Agriculture Ministry issued an order on Friday deeming truck stops, gas stations and highway diners as essential services, seeking to ensure cargo haulers keep moving grains, feed and meat to markets at home and abroad despite the coronavirus pandemic.

States and municipalities have imposed strict quarantine measures to combat the fast-spreading disease, threatening to disrupt food production and the shipment of farm products to supermarkets and ports.

Brazil is one of the world's largest producers of food and the top exporter of soy, beef, coffee and sugar.

With the newly imposed restrictions, truckers were facing difficulties finding restaurants, rest stops and auto repair services on journeys across the country, Latin America's largest economy, often covering up to 2,000 km (1,242 miles) to ship grains to port.

Lacking a strong railway system, Brazil chiefly relies on cargo trucks to move all types of goods.

Sotran Logística, a leading Brazilian freight company, said demand to ship grains, chiefly soybeans, rose by 30% in March and was projected to grow by 40% in April.

The company's co-chief executive, Charlie Conner, said its trucks were projected to move 16 million tonnes of grains in 2020. It was not immediately clear how the coronavirus outbreak factored into demand for freight.

Under the order issued Friday, convenience stores and highway resting points are deemed essential, as are ports, warehouses, railways and the highways themselves.

Earlier this week, at least two towns in the heart of Brazil's farm country enforced quarantine measures that placed curbs on food processors and threatened Brazil's grain shipment capabilities at a crucial time for farmers, who last week had a little more than 30% of soy fields still to harvest this season. One of the towns subsequently reversed the measure.

"The agriculture ministry's order is the federal government's response to municipal decrees like those in Rondonópolis and Canarana, that potentially would block food production and shipments of Brazil's harvest," said Frederico Favacho, partner at Mattos Engelberg Advogados.

In a meeting with state representatives on Thursday, Agriculture Minister Tereza Cristina Dias urged regional governments to help ensure food supply chains and essential services remain open.

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Grain market distortions wrought by coronavirus see barley role reversal

26 March – Agrimoney.com

That old adage of the US setting trends, which Europe follow, has transferred to grain markets.

The US has for some months witnessed the anomaly of lower-quality, biscuit-grade soft red winter wheat, as traded in Chicago, selling for more than higher-protein stuff. Even at some point gaining a premium to top notch spring wheat, as traded in Minneapolis.

The topsy turvy pattern reflects the tighter supplies of soft red winter wheat (2019-20 stocks-to-use ratio of 36%, using US Department of Agriculture forecasts) compared with hard red winter wheat (56%) and hard red spring (42%).

Now that trend has switch to Europe too, where malting barley premiums have near evaporated – and even gone negative. At least, on paper.

Agritel data show feed barley trading at E169 a tonne on Thursday, up 9.0% so far for 2020. Malting barley, meanwhile, is priced at E160 a tonne, down 0.6% for the year (which it had started with a E6-a-tonne premium on this dataset).

The reversal reflects in part the fact that the data are taken from different locations – the feed barley values in Rouen in northern France, already taken to port so with that cost factored in, and the malting ones inland at Creil, closer to Paris.

However, it does illustrate supply and demand dynamics too, with ample supplies of malting barley available – while demand is being sapped by knock-on effects of the Covid-19 outbreak.

Even for malting barley buyers who did not wrap up their purchases in the autumn, as most did, the chances of them needing to dip back into the market have been slashed by European lockdowns on bars and restaurants.

"I am not sure that even if this [coronavirus outbreak] is over in a few weeks, beer consumption will be down," an Agritel source says.

That has left malting barley producers with two options – either selling their crop for feed, as the market is telling them, or hold crop to next season in the hope of better prices.

But the chances of a premium re-emerging have been cut by the weather improvement which is expected to see weekly FranceAgriMer data on Friday show rapid progress in the country's spring barley sowings.

A third option, drowning their sorrows, may help, but not by much.

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Argentine grains port workers request exports be suspended due to pandemic

26 March – Thisismoney.co.uk

A labor union representing Argentine grains port workers on Thursday asked the government to suspend exports, a move that would put upward pressure on world soy prices and hobble the country's main source of revenue as it seeks to avoid default.

The URGARA union, which represents inspectors who check the quality of grains before they are loaded onto ships, said the coronavirus pandemic was severe enough to justify suspending port activities in the world's No. 1 exporter of soymeal livestock feed and No. 3 supplier of corn and raw soybeans.

"We strongly request that all operations in ports be suspended for 15 days. In the current health emergency, we do not consider most port activities to be essential," URGARA chief Pablo Palacio said in an open letter to Argentine President Alberto Fernandez.

"Foreign trade should be considered only for activities that cannot be postponed, that is, as a true exception to the rule, not as an authorization to open the door to foreigners from countries considered risky," it said.

The government had no immediate comment on the letter.

A cut in grains flow from Argentina could shift global commodity trade flows as importers turn to rival suppliers like Brazil or the United States. Growers in Argentina's Pampas farm belt said they were against a port shutdown.

As of Thursday there were 502 confirmed cases of coronavirus in Argentina, with eight deaths.

The pandemic hits at the worst possible time for Argentina, as growers start harvesting this season's crops and the cash-strapped government scrambles to avoid defaulting on more than \$100 billion in what it calls "unsustainable" debt.

"We need to take all precautions, but there's no way we can stop exporting. I hope the authorities can find a solution," said Santiago del Solar, a corn and soy farmer in the bread-basket province of Buenos Aires.

"If the government starts to halt cargo ships, soybean prices go up and government tax collection goes down," said fellow Buenos Aires grower David Hughes. "They have to try to convince port workers to keep doing their jobs, while taking necessary precautions."

Argentine growers are expected to harvest 50 million tonnes of corn this season and 51.5 million tonnes of soy. Pigs, poultry and cattle are fed with Argentine soymeal in markets around the world, concentrated in Europe and Southeast Asia.

Early this week industry sources said the soymeal factories that dot the banks of Argentina's Parana River were getting only a fraction of their normal supply of raw soybeans because dozens municipal governments had banned grains trucks from driving through their jurisdictions.

The government sought to clear those bottlenecks on Wednesday by issuing a resolution saying people working in jobs related to foreign trade were exempt from the "preventive isolation" orders that have been applied throughout the country.

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Upcoming wheat procurement a worry for Punjab, Haryana

25 March - TimesofIndia

With Punjab and Haryana fighting to stop spread of novel coronavirus with lockdowns and curfew, the two states — collectively known as food basket of India — have to make arrangements for procurement of rabi (winter sown) crops, which normally starts at the beginning of April. The rain and hailstorm that took place in the last week of February and first week of March may have some adverse impact on the yield of rabi crops, such as wheat and mustard. Officially, wheat procurement begins from April 1 in Punjab and Haryana. However, arrivals pick pace in both the states about two weeks later — after Baisakhi. With the coronavirus (Covid-19) cases spreading, farmers and procurement agencies would be praying for the situation to ease in next three-four weeks so that wheat harvest could progress smoothly. Haryana's emergency meeting to decide on procurement, Punjab has storage issues. Both Punjab and Haryana are the largest contributors of wheat, around 70%, to the central pool that is used to run public distribution and other welfare schemes. Out of 341.33 lakh metric tonnes (LMT) of wheat procured for the central pool in the 2019-20 rabi marketing season, Punjab and Haryana share was 129.12 LMT and 93.2 LMT, respectively. In the 2018-19 marketing season, Punjab and Haryana contributed 126.92 LMT and 87.84 LMT of wheat to the central pool, respectively, out of total 357.95 LMT. Punjab wants the Centre to start procurement at a later date, from April 1 to April 10. Haryana will take a final decision on procurement in an emergency meeting of agriculture authorities. Sanjeev Kaushal, additional chief secretary, Haryana agriculture and farmers welfare department, told TOI that the state was ready for procurement as per normal schedule but considering the current situation a special meeting of all stakeholders was called on Monday evening. "The issues regarding MSP, procurement of crops etc. would be decided in the meeting after discussing with the concerned departments/agencies. As the mustard would start coming to market from March 28, a final plan regarding procurement of rabi crop would be prepared by Tuesday," Kaushal added. Punjab has another problem — 576 Food Corporation of India (FCI) godowns in the state still have stock of around 202 MLT of paddy and wheat against the capacity of 235 LMT. That means it does not have enough space to store wheat once it is procured in April. Around 135 LMT of wheat is expected to arrive in grain markets in the rabi season. Punjab chief minister Amarinder Singh and the state food supplies minister both have urged the Union government to transfer the food grain stock to other needy states. "As curfew has been imposed in Punjab to check the spread of coronavirus, we are taking up the issue with FCI and expect that in a day or two it (FCI) will start moving grains from their godowns in Punjab to other states. The Union government has also urged various state governments to take their respective quota of wheat and paddy for the public distribution system for next six months," the Punjab minister said. According to Jagraj Dandi, joint director, statistics, department of agriculture and farmers welfare, Haryana, the area under wheat crop during 2019 was 25.53 lakh hectares and the total production was 125.73 LMT. As per recent data tabled in the Haryana assembly during the February 2020 budget session, the state had procured 93.60 LMT of wheat on MSP last season. Union minister of state for consumer affairs, food and public distribution Danve Raosaheb Dadarao informed the Rajya

Sabha during the recent Parliament session that FCI had 576 godowns (owned and hired) in Punjab for storage of central pool stock of food grains. It has hired 176 godowns, comprising 168 built under private entrepreneurs guarantee (PEG) scheme through Punjab State Warehousing Corporation (PSWC), Central Warehousing Corporation (CWC), Punjab Grains Procurement Corporation (Pungrain), and eight private godowns. On January 31, 2020, a total capacity of 44.69 LMT was created in Punjab under the PEG scheme. The Union government has approved construction of 90 LMT of cover and plinth scheme as temporary storage facilities for accommodating wheat stock for the rabi 2020-21 season in Punjab, Haryana, Uttar Pradesh and Madhya Pradesh. Of this, a capacity of 35 LMT has been approved in Punjab. FCI has hired 168 godowns constructed by private parties under PEG godowns — four private godowns directly hired by FCI are in Jalandhar district, followed by two in Moga and one each in Tarn Taran and Gurdaspur. FCI pays a rent of Rs 10.42 per month per quintal to CWC-owned godowns in Punjab, Rs 9.36 per month per quintal to SWC-owned godowns, Rs 7 per month per quintal to godowns constructed under PEG scheme, Rs 1.07 (urban) and Rs 0.95 (rural) per month per quintal to godowns of Agriculture Refinance and Development Corporation. The Union government has approved an action plan for construction of steel silos in the country for a capacity of 100 LMT in Public Private Partnership mode for modernising storage infrastructure and improving shelf life of stored food grains.

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Reports

Crop Prospects and Food Situation - FAO

Crop Prospects and Food Situation is issued by the Trade and Markets Division of FAO, under the Global Information and Early Warning System (GIEWS). It is published four times a year and provides a forward-looking analysis of the food situation by geographic region, focusing on the cereal production outlook, market situation and food security conditions, with a particular attention on Low-Income Food-Deficit Countries (LIFDCs).

COVID-19 and the risk to food supply chains: How to respond? – FAO

As the COVID-19 pandemic turns into a global crisis, countries are taking measures to contain the pandemic.

Supermarket shelves remain stocked for now. But a protracted pandemic crisis could quickly put a strain on the food supply chains, which is a complex web of interactions involving farmers, agricultural inputs, processing plants, shipping, retailers and more. The shipping industry is already reporting slowdowns because of port closures, and logistics hurdles could disrupt the supply chains in the coming weeks.

This policy brief provides recommendations on measures to consider in order to keep the supply chain alive in these times of crisis.

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