

MONTHLY NEWS REPORT ON GRAINS

FAO Markets and Trade Division

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Market News

- EU's maize deficit highlighted by loss of imports from Ukraine
- India's big wheat opportunity: How Delhi can make up for export shortfall from Russia, Ukraine
- Ukraine may resume wheat exports if enough sowing completed
- Input costs hindering South African maize, wheat planting
- Weather favours Russia's winter grain crop prospects
- Argentina has sold 18.8 million tonnes of 21/22 maize
- Brazil planning to become a net exporter of wheat, harvesting a volume similar to that of Argentina
- Russian grain exports persist, albeit at slower pace, as China turns to US maize
- Strong Asian rice demand for animal feed sparks food supply worries
- Africa particularly vulnerable to Ukrainian grain loss

Reports

- Crop Prospects and Food Situation - FAO

Monthly Information Sources

- AMIS Market Monitor
- FAO Cereal Supply and Demand Brief - FAO
- Grain Market Report – International Grains Council
- Oilcrops Monthly Price and Policy Update – FAO
- Crop Monitoring in Europe - European Commission
- FAO Rice Price Update – FAO
- World Agricultural Supply and Demand Estimates – U.S. Department of Agriculture
- Early Warning Crop Monitor – GEOGLAM
- Commodity Price Data - World Bank
- Food Price Monitoring and Analysis (FPMA) – FAO
- GIEWS Country Briefs - FAO
- Mediterranean Agricultural Information Network - MED-AMIN
- Club Demeter Système de veille
- FAO's Big Data tool on food chains under the COVID-19 pandemic
- COVID-19 and World Trade
- IFPRI COVID-19 Food Trade Policy Tracker

Market News

EU's maize deficit highlighted by loss of imports from Ukraine

29 March – spglobal.com

The European Union's structural deficit in maize has been highlighted by Russia's invasion of Ukraine, its main source for imports of the feedgrain, said agricultural consultancy Tallage, which expects the resultant destocking to reduce the region's stocks to their lowest level since 2013.

"There is a structural deficit of 13.5 million tonnes on average between domestic supply and demand," said Benoit Fayaud, grain and crop analyst at Tallage.

In slides that were circulated March 29, Fayaud noted that the EU's pigs, chicken, sheep and cows will consume a combined 131 million tonnes of feed grains in 2021-22.

Maize's share of the European Union feedgrain market has grown to 44% in the 2021-22 marketing year from 35% in the 2009-10, Fayaud told an audience in Paris on March 23. By contrast, the share of feed wheat and barley has fallen to 32% and 25% respectively.

The EU produced 65 million tonnes of maize in the 2020-21 marketing year (October to September) and required 56 million tonnes to feed its livestock and an additional 17.7 million tonnes going for ethanol, maize starch and human consumption.

Prior to Russia's invasion, Ukraine had been expected to provide just over half of the EU's 14.7 million tonnes in maize imports for the 2021-22 marketing year, according to Fayaud. While shipments between EU countries were seen at 18.1 million tonnes, primarily from Poland, France, Romania, Bulgaria and Hungary to Spain, Portugal, Benelux Germany and Italy.

The closure of Ukraine's ports will boost those intra-EU shipments, leading to a decline in stocks from 3.8 million tonnes at the end of September 2021 to 3.2 million tonnes at the end of September 2022, Fayaud said.

Given the absence of Ukrainian imports, Tallage has raised its estimate for this marketing year's imports into the EU from North America, Brazil and Argentina. It now expects the EU to take 7 million tonnes from those origins, compared to its earlier estimate of 5.5 million tonnes.

The call on South American supplies has raised additional challenges for importers in the EU, where there are restrictions on the use of genetically modified maize. The majority of Argentina's production is genetically modified. Spain's agriculture minister on March 9 appealed to the EU to relax its import controls, and the country has temporarily relaxed restrictions on residues from pesticides that are commonly used in Argentina.

[back to top](#)

India's big wheat opportunity: How Delhi can make up for export shortfall from Russia, Ukraine

28 March – theprint.it

The conflict between the two wheat-surplus nations has raged on for a month now, with no end in sight. Consequently, this supply shock has made the global wheat prices climb — all working in India's favour.

Averaging 100 million tonnes (MT) in the last five years, India is the world's second-largest producer of wheat after China (133 MT), but a high consumption base has seldom allowed the country to be a big exporter.

According to the United Nations Food and Agriculture Organization (FAO), clubbed together, Russia and Ukraine produce more or less the same amount of wheat India does, 104 MT. However, these countries are collectively home to seven times fewer people (18-19 crore) than India (134 crore), which allows them to export huge quantities of wheat. Hence, countries with inadequate wheat production, especially west Asia and north Africa, rely on Russia and Ukraine.

According to data available with the data visualisation site Observatory of Economic Complexity, in 2019, Russia's wheat exports amounted to \$8.14 billion, and Ukraine exported about \$3.11 billion of wheat. Together, the countries accounted for a quarter of the world's total wheat exports.

A huge chunk of this went to Egypt, which took about 31.3 per cent (\$2.55 billion) of Russia's and 22 per cent (\$685 million) of Ukraine's exports. These two countries meet about 70 per cent of Egypt's wheat import demands, which is why the crisis has hit the country hard.

Egypt needs a huge amount of wheat to run its food subsidy programme, which provides subsidised bread to millions of its citizens, costing about \$5.5 billion to its exchequer. With this conflict, its food security programme is now under a significant threat.

Countries like Indonesia, Turkey, Bangladesh, the Philippines, Tunisia, Morocco, Bangladesh, Yemen, Nigeria and Thailand also each buy over \$100 million worth of wheat from Russia and Ukraine.

Despite being a wheat-rich nation, India used to export only 1 per cent of its produce and that too mostly to its neighbours — Bangladesh, Nepal and Sri Lanka — and others like the United Arab Emirates.

The Russia-Ukraine conflict has presented India a chance to grow its exports, especially when 24 MT of wheat is lying in government storage as of February 2022.

However, experts believe that India's wheat faces a stiff market, and much of its competitiveness is dependent on high global commodity prices.

"This year, we can expect to export about 8-10 million tonnes of wheat. Mundra and Kandla (in Gujarat) will be our main ports," said Siraj Hussain, former agriculture and food processing industries secretary.

It must be noted that India's wheat exports were already soaring even before Russia invaded Ukraine, courtesy the Covid-19 pandemic, which restricted the global supply and resulted in higher global prices.

India exported about 2 MT of wheat in 2020-21 and in the April-January period of the ongoing 2021-22 fiscal, the country has already exported 6 MT, according to Ministry of Commerce and Industry.

The government of India offers a minimum support price (MSP) to the farmers at which it promises to pick up their stock. This MSP used to be higher than the market price, but the recent rise in global commodity prices made India a competitive supplier, claimed the International Agricultural Trade Report published by the US Department of Agriculture in July 2021.

As on 22 March, the global price of wheat already touched the 378 euros or about Rs 3,167 per quintal, which is way higher than the MSP fixed for this year at Rs 2,015/quintal.

"In the future it will depend on global prices. This year prices are record high due to war. If it ends and prices cool down, our competitiveness will also go down," said Hussain.

[back to top](#)

Ukraine may resume wheat exports if enough sowing completed

28 March - Bloomberg

Ukraine may ease wheat-export curbs as soon as next month, once it is confident that spring sowing is progressing enough despite Russia's invasion, though export capacity remains strained with some seaports effectively closed by fighting, an official who oversees the country's trade said.

The Cabinet will likely discuss whether it can remove licenses required from shippers to sell wheat abroad in April, after it estimates potential yields following planting and makes sure this year's harvest will be enough to provide food security, Taras Kachka, deputy economy minister told Bloomberg News in a video interview Sunday.

The government introduced licensing in March to curb exports of major Ukrainian agriculture commodities like wheat, maize, sunflower oil, poultry and eggs, following Russia's invasion the previous month. However, restrictions on maize and sunflower oil were removed last week, as the nation has stockpiled enough and farmers need foreign cash to keep their operations going.

"We hope that for wheat we will be able to resume exports as well," Kachka said. "Sowing has begun and, fingers crossed, it will be as good as it can be. Once we see what the outlook for this year harvest is, and what our domestic stockpiles are, we will make a balanced decision."

The eastern European nation is struggling to conduct its spring planting campaign in conditions that it hasn't faced since the Second World War, with farmers having to work in fields under constant risk of shelling and fighting. The Agriculture Ministry estimates sowing areas may shrink by 30% to 50% from last year. The planting effort is vital for the country's economy, which is heavily dependent on agriculture exports.

Another obstacle is how to ship out grains and oilseeds, as most of the country's southern seaports typically used for exports have been blocked by Russian troops in regions near the Black Sea and the Sea of Azov. Even under such conditions, shippers managed to export more than 1 million tons of maize and 300,000 tons of wheat since the beginning of March, according to Kachka.

The government in Kyiv is considering redirecting export shipments to seaports that are under Ukraine's control near the border with Romania, from which cargoes may later go further west to foreign markets via the Danube river. But the bottleneck is Ukraine's railway that can ship just a few hundred thousand tons of crops per month under current circumstances, and that's far below the volumes that can usually be exported via sea ports, according to the market researcher UkrAgroConsult.

The first shipments via that route, via Izmail, took place last week, Kachka said. Izmail is an inland port in southwestern Ukraine, in the Danube delta region.

[back to top](#)

Input costs hindering South African maize, wheat planting

28 March – World-grain.com

Despite high commodity prices to provide incentive for maize and wheat planting, acreage for the two crops in South Africa is expected to remain flat in the 2022-23 marketing year due to the lack of availability and high cost of inputs, according to a Global Agricultural Information Network report from the Foreign Agricultural Service of the US Department of Agriculture (USDA).

The USDA said the cost of farming inputs, especially fertilizer, more than doubled this past year, increasing the risk of production in a weather-dependent industry. As a result, the

USDA forecasts that South Africa's maize area will stay flat in 2022-23, while wheat area will increase by a modest 10%.

However, the report noted that South Africa should maintain its status as a net exporter of maize with exports of 2.5 million tonnes, while wheat and wheat products imports should remain at 1.7 million tonnes.

South Africa's rice imports are expected to increase by 3% to 1.1 million tonnes on a marginal growth in demand.

Assuming normal weather conditions and including the subsistence farming sector, South Africa's total maize crop for 2022-23 could reach 15.6 million tonnes, which is slightly larger than the expected maize crop of 15.1 million in 2021-22. The USDA projects South Africa's wheat output at 2.1 million tonnes in 2022-23, after producing 2.3 million tonnes in 2021-22.

[back to top](#)

Weather favours Russia's winter grain crop prospects

24 March - Hellenicshippingnews

Weather favours Russia's winter grain sowings so far, signalling good prospects for the 2022 crop, state weather forecaster Hydrometcentre said on Wednesday.

Russia is one of the world's largest exporters of wheat, supplying it to Egypt and Turkey among other countries. It sows winter grains in the autumn, plants spring grains in spring and then harvests both of them in summer.

"The forecast for the harvest of winter crops is good," Roman Vilfand, head of science at Hydrometcentre, told an online briefing. He did not provide an estimate of the upcoming crop.

Russia is expected to raise this year's grain crop, including both winter and spring grains, to 123 million tonnes, according to the latest agriculture ministry forecast, up from 121.3 million tonnes in 2021.

Winter grains in the main producing regions – Russia's south and the North Caucasus – are developing well, and only 10% of the sowings in other regions are at risk of poor condition, according to Vilfand.

Moisture reserves in soil – another important factor in the healthy development of the crop – are very good, and this will help protect the sowings if the weather in Russia's south proves to be warmer and dryer than usual in April, he added.

[back to top](#)

Argentina has sold 18.8 million of 21/22 maize

22 March – Nasdaq.com

Argentina producers have sold 18.8 million tonnes of maize for the 2021/22 season, the Ministry of Agriculture said on Tuesday.

According to the ministry, the country recorded 1.3 million tonnes of maize sold between March 9 and 16, two times the volume registered in the same period a year ago, boosted by the conflict between Russia and Ukraine that has cut the global supply of the grain.

Argentina is the second-largest world exporter of maize and its farmers are beginning to harvest the 2021/22 cereal, which the Buenos Aires Cereal Exchange (BdeC) estimates at 51 million tonnes.

At the end of last year, the Argentine government set a limit on maize exports for the 2021/22 cycle of 41.6 million tonnes to try to control high domestic food prices.

Regarding 2021/22 soybeans, Argentine farmers have sold 10.8 million tonnes of the oilseed, whose harvest will begin in the coming weeks, according to the government. On the same date last season, the sales volume had been 12.4 million tonnes.

The BdeC estimated soybean production for the current campaign at 42 million tonnes. Foreign exchange from agricultural exports is essential for Argentina's battered economy, which is only now beginning to grow after more than two years of stagnation that was aggravated by the effects of the pandemic.

[back to top](#)

Brazil planning to become a net exporter of wheat, harvesting a volume similar to that of Argentina

22 March - Mercopress

Brazil is working to reduce its dependence on foreign produce and hopes to take advantage of recent record exports to increase crops this year. In effect from December 2021 to March 2022, Brazil exported some 2.5 million tons of wheat, an unprecedented volume that benefited from a historically large harvest and, more recently, from additional demand generated by the conflict between wheat exporters Ukraine and Russia.

Farm lobbies in Brazil believe that in effect wheat could follow the path of maize, which gained room in the country after consolidating itself as an export product.

“The expansion of any commodity occurs via exports and not domestic consumption. That was the case with soybeans, maize, coffee, and sugarcane in Brazil. Therefore, only exports will lead to a growth in the domestic production of wheat,” said Luiz Pacheco from the T&F consultancy.

In the last decade to 2020, maize exports from Brazil increased more than threefold to around 35 million tons, while production has nearly doubled over the same period to over 100 million tons.

Brazil normally imports more than 50% of the wheat it consumes, mainly from Argentina. Given this context, the country has enough room to more than double the product's crop area, which currently only reaches 2.47 million hectares. By doing that, the country could become self-sufficient and produce 12.7 million tons of wheat.

The project only takes into consideration the state of Rio Grande do Sul, which plants more than 6 million hectares of soybeans in the summer and only 1.16 million hectares during winter, mainly wheat, said Embrapa Trigo analyst Oswaldo Vieira.

Vieira believes farmers are prepared and adds that the port the Port of Rio Grande (RS) has idle capacity between the end and the beginning of the year. Therefore, the wheat crop from Rio Grande do Sul could enter the international market before the Argentine harvest. Vieira, who participated in the elaboration of the plan that is currently being updated before being delivered to the government by the Brazilian Wheat Industry Association (Abitrigo), said that Rio Grande do Sul farmers already had the necessary agronomic conditions to expand planting. Now, they have the right prices too.

According to T&F consultants, if Rio Grande do Sul had a second wheat crop in the area dedicated in summer to soybeans, it could have a cereal harvest of around 17 million tons, close to that of Argentina.

Wheat hit 14-year highs on the Chicago Stock Exchange because of the lower Eastern European supplies since the conflict began.

Vieira points out that many consulting firms have argued that the planted area could grow by around 30% this year in Rio Grande do Sul, considering that nearly 600,000 tons have already been sold in advance.

And when it comes to costs, there is margin for a competitive crop despite the increase in inputs. “Because the soybean harvest was poor, there is a large amount of fertilizer in the soil to service the wheat crop.”

[back to top](#)

Russian grain exports persist, albeit at slower pace, as China turns to US maize

18 March –farmpolicynews.illinois.edu

Bloomberg writer Megan Durisin reported yesterday that, “Grain exports from Russia are slowing but continue to flow, with ships calling at the nation’s ports even as the conflict in Ukraine rages on and fears over global food security increase.

“AgFlow, a Geneva-based crop data company, estimates about 73 vessels carrying agricultural staples like wheat departed Russia in the first two weeks of March, versus 220 during the same period last year. Sea/ by Maritech, another ship-tracking platform, estimates crop tonnage from the nation’s ports in the week to March 12 fell by half from the preceding seven days.”

The Bloomberg article stated that, “‘Following this week’s tenders, there is more confidence that wheat is available for export at an elevated price.’ Rabobank analysts said Wednesday in a note. ‘However, the situation remains deeply uncertain and shifting to this ‘new normal’ of greatly reduced Black Sea exports will still take time.’”

Also yesterday, Bloomberg writers Michael Hirtzer and Tarso Veloso Ribeiro reported that, “China is ramping up maize purchases from the U.S. as Russia’s invasion of Ukraine snarls grain exports and puts spring plantings in doubt, pushing prices higher in Chicago.

“The world’s top importer scooped up 200,000 metric tons of maize last week for shipment in the season beginning Sept. 1, U.S. Department of Agriculture data showed Thursday, the most since December. While China was only the fourth-largest buyer for the week, the sale was notable since the Asian country had been purchasing supplies from Ukraine. China was also the leading buyer of U.S. soybeans, picking up more than 800,000 tons.”

Meanwhile, with respect to crop production in Ukraine, Reuters writer Pavel Polityuk reported yesterday that, “Ukrainian winter wheat crops are in good condition and the country will have enough bread this year, Deputy Agriculture Minister Taras Dzoba said late on Wednesday.”

The article noted that, “APK-Inform agriculture consultancy said this week the area sown with Ukraine’s 2022 spring grain crops could fall 39% to 4.7 million hectares due to Russia’s military invasion.”

Last week, Ukraine President Volodymyr Zelenskyy urged farmers to plant as many fields as possible.

And a separate Reuters article from yesterday reported that, “Ukraine has started sowing spring grain in some areas but no mass sowing campaign has yet started, deputy agriculture minister Taras Vysotskiy told Reuters on Thursday.

He said it was not yet possible to forecast how much grain would be sowed in Ukraine, which has been invaded by Russian forces.

Amid the uncertainty, Reuters writer Nigel Hunt reported yesterday that, “The International Grains Council (IGC) on Thursday cut its forecast for Ukraine’s grain exports in the current 2021/22 season, noting ongoing conflict in the country had fuelled concerns about potential food security risks.

“Ukraine’s grain exports were revised to 47.8 million tonnes, sharply down from last month’s forecast of 62.8 million with the council noting projections were especially tentative and subject to significant uncertainty.”

Hunt added that, “Ukraine’s maize export outlook was cut to 21.0 million tonnes from 31.9 million while wheat exports were downwardly revised to 20.8 million from 24.5 million. “The IGC also downwardly revised its forecast for Russian grain exports to 37.1 million tones from 37.7 million.”

Meanwhile, Reuters writer Maytaal Angel reported yesterday that, “The conflict in Ukraine is already resulting in rising food prices and a shortage of staple crops in parts of central Asia, the Middle East and north Africa, the United Nations International Fund for Agricultural Development (IFAD) said on Thursday.”

And Bloomberg News reported yesterday that, “‘What’s going on in Ukraine is going to change our whole approach, and our view on the future of agriculture,’ EU Commissioner for Agriculture Janusz Wojciechowski said in the European Parliament. ‘We have to have a return to food security.’

“The EU is working on measures that would allow fallow land to be used to grow protein crops to avert a scarcity of feed, Wojciechowski said. It’s also looking at offering support to the pig-meat industry, and studying a proposal to allow member nations to grant aid to farmers in a relaxation of state-aid rules, as happened during the pandemic.”

With respect to near-term agricultural production issues, Bloomberg writers Brian K Sullivan, Allison Nicole Smith, and Michael Hirtzer reported yesterday that, “The risk of major flooding in the fertile Red River Valley and continued snow cover across Minnesota and North Dakota threaten to delay planting across the region for weeks, U.S. government forecasters said in a call with reporters.”

And Reuters writer Karl Plume reported yesterday that, “A severe drought that has gripped parts of the western United States since mid-2020 is likely to persist or worsen this spring due to expected above-normal temperatures and below-normal precipitation, the National Oceanic and Atmospheric Administration (NOAA) said Thursday.”

[back to top](#)

Strong Asian rice demand for animal feed sparks food supply worries

16 March – Reuters

A surge in wheat and maize prices is boosting demand for low-grade rice in animal rations across Asia, pushing up prices of the world's most important staple at a time when global food inflation is already hovering near record highs.

Global crop importers are scrambling for supplies after Russia's invasion of Ukraine severed grain shipments from the two countries, which together account for around 25% of world wheat and 16% of world maize exports.

Chicago wheat futures hit a record high last week while maize climbed to its highest in a decade after war-torn Ukraine shut its ports and Western sanctions hit Russian exports. The price spikes in wheat and maize in turn pushed buyers to seek alternatives, including in China, by far the world's largest feed market. Importers there are in talks to buy extra volumes of broken rice - inferior rice where the grains have been fractured during the milling process - to fatten hogs and other animals, traders and analysts said.

Rice typically trades at a steep premium to wheat, but wheat's blistering 50% price surge from a month ago has sharply cut the difference between the two grains, and even made wheat more expensive than some lower grades of rice.

Benchmark food-grade rice from Thai exporters made its biggest weekly gain since October 2020 last week on the back of firmer food and feed demand, climbing 5% to around \$421.50 a tonne.

That's the highest since last June, and sources say prices may keep rising if the disruption to Black Sea flows persists. Export prices from Vietnam and India have also climbed.

"There could be greater interest in broken rice for animal feed if the strength currently dominating wheat and maize markets persists," said Rome-based FAO rice economist Shirley Mustafa.

"It is not just animal feed, there could also be a substitution in other use sectors, such as more people turning to rice for their meals."

China had booked up to two million tonnes of Ukrainian maize imports for this year, but most of those shipments are now in jeopardy given the disruption to Ukraine's logistics chains.

To replace those lost volumes, China is expected to import around three million tonnes of broken rice, up from about two million tonnes annually in the past two years, said a Beijing-based rice trader.

[back to top](#)

Africa particularly vulnerable to Ukrainian grain loss

10 February – dtnpf.com

Long-term loss of Ukrainian grain on the world export market due to Russia's invasion of the country could have a particularly damaging impact on North Africa, where many countries are dependent on a stable supply of imported cereals to meet food production demand. Ukraine accounts for about 10% of the world's wheat and supplies large quantities of grain to North African states, which other sources could not replace even in the long run, according to current model calculations by the Kiel Institute for the World Economy, based in Kiel, Germany.

Hendrik Mahlkow, trade researcher at the institute, and Tobias Heidland, research director for international development and member of the African Research Cluster, used the KITE (Kiel Institute Trade Policy Evaluation) model to simulate the long-term consequences for Africa of an end of exports of Ukrainian wheat and other cereals for food production, such as maize or sorghum. The model calculations did not include cereals used as animal feed, such as maize. Tunisia and Egypt would particularly face difficult situations.

In Tunisia, the country's total wheat imports would permanently decrease by over 15%, and imports of other cereals would decrease by almost 25%. Egypt would import over 17% less wheat and almost 19% less other cereals, while South Africa would import 7% less wheat and over 16% less other cereals.

Imports of other cereals would also be noticeably lower in Cameroon (down 14 %) and Algeria and Libya (-9.6 %, aggregated in the trade model). Wheat imports would drop significantly in Ethiopia (-9.6 %), Kenya (-7.9 %), Uganda (-7.1 %), Morocco (-6.2 %), and Mozambique (-6 %).

"Ukraine's central importance to Africa's food supply is evident from our estimates, especially in countries that consume grains they buy on the world market," Mahlkow said. "Ukraine is irreplaceable as a grain supplier, even in the long term. Its failure worsens Africa's supply and also drives up prices."

If less grain is available, prices will rise, in some cases dramatically. According to the simulation, other cereals would become more than 24% more expensive in the long term in Tunisia, almost 9% in Algeria and Libya, and more than 4% in Egypt. The permanent increase in the price of wheat would be nearly 9% in Kenya, almost 8% in Uganda, 5% in Tunisia, 4% in Mozambique, and over 3% in Egypt.

KITE simulates the long-term and permanent changes in trade flows when conditions change. The short-term consequences for countries and their populations not reflected in the model are likely to cause even greater disruptions, the researchers noted.

[back to top](#)

Reports

Crops Prospects and Food Situation – FAO

FAO assesses that globally 44 countries, including 33 in Africa, nine in Asia and two in Latin America and the Caribbean, are in need of external assistance for food. Conditions are projected to worsen significantly in West Africa, due to conflicts, high food prices and reduced harvests, while the situation is alarming in East Africa. Humanitarian needs are foreseen to also increase in Southern Africa in late 2022 due to the impact of adverse weather.

[back to top](#)

Monthly Information Sources

AMIS Market Monitor

FAO Cereal Supply and Demand Brief - FAO

Grain Market Report – International Grains Council

Oilcrops Monthly Price and Policy Update – FAO

Crop Monitoring in Europe - European Commission

FAO Rice Price Update – FAO

World Agricultural Supply and Demand Estimates – U.S. Department of Agriculture

Early Warning Crop Monitor – GEOGLAM

Commodity Price Data - World Bank

Food Price Monitoring and Analysis (FPMA) – FAO

GIEWS Country Briefs - FAO

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