

MONTHLY NEWS REPORT ON GRAINS

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Market News

EU wheat exports hit record high

28 October – UkrAgroConsult.com

EU wheat exports so far this marketing year are likely to have reached their highest for the period amid strong milling wheat demand from north Africa and rising feed wheat purchases from Asian buyers.

EU-27 soft wheat exports totalled 8.99mn t on 1 July-24 October, up from 7.23mn t a year earlier, according to preliminary European Commission data. But only some data from France — one of the EU's largest wheat exporters — has been logged, so overall exports might have been higher.

EU wheat shipments might already have reached 12mn-12.5mn t, including France's own foreign trade figures for August and preliminary ship line-ups from September-October, according to estimates made by Argus' agriculture consulting arm, Agritel.

French soft wheat shipments to non-EU countries totalled 859,000t in August, up from 345,300t in July and 685,000t a year earlier, French customs data show. Some 380,000t shipped in August headed to Algeria, and 78,000t to Ivory Coast.

And France shipped 806,500t of wheat to non-EU countries in September, preliminary line-up data show. China then overtook Algeria in receipts of French crop last month — France shipped 255,000t to China, compared with 202,800t to Algeria.

This implies that France exported at least 2.01mn t of wheat to non-EU countries in July-September alone, compared with just 742,000t officially logged by the European Commission.

This would also put EU exports at a new high, with soft wheat shipments having previously peaked at 10.56mn t in July-October of the 2014-15 marketing year (see chart).

Reduced and high-priced shipments from Russia pushed some buyers in north Africa and the Middle East to the EU. EU-27 exports to Egypt have totalled 1.01mn t so far in 2021-22, up from zero a year earlier, according to the European Commission.

South Korea and Vietnam have emerged as two of the EU's key buyers this year as excess supply domestically made the bloc's feed wheat competitive in global markets. South Korea has this year imported 823,000t from the EU — its third largest supplier after Algeria and Egypt.

Increased interest in EU wheat has supported wheat futures on Europe's Euronext exchange. The December milling wheat contract was most recently at €285.50/t, up from €209/t at the start of the 2021-22 marketing year in July and only €5/t below its previous record in March 2008.

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Surge in US ethanol production could use the exports to match

27 October – Nasdaq.com

US maize-based ethanol production over the last year or so has been more of a drag than a support on grain markets as demand and world economies continue to claw back from the coronavirus slump.

Now, with global energy prices at seven-year highs and gasoline consumption improving, profit margins for US ethanol producers have surged, lifting output near record highs.

The risk of strong production is that stockpiles could build excessively without equally robust demand, though so far that has not been the case. An increase in lagging exports

could help balance any extended rise in output, though two of the United States' top customers have been less active.

US ethanol production last week reached 1.106 million barrels per day, the second-best for any week on record and the second consecutive week of top-level output. The recent production rate is more than 10% above the late-summer downturn.

Despite the production boost, stocks have mostly maintained over the last month, drifting less than 1% lower in the latest week to 19.9 million barrels. That is slightly above year-ago levels on the same date but well below those from the three prior years.

Although only about 10% of US ethanol output is exported each year, trade has recently been a sore spot for the industry. Shipments through the first eight months of the year reached 3 billion liters (796 million gallons), down 10% from last year and the lowest for the period in five years.

Brazil is part of the problem, as US ethanol imports have become more expensive than local product since the free tariff-rate quota ended late last year. January-August U.S. exports to Brazil, normally a top-two importer of the US biofuel, were down 82% from last year to an eight-year low for the time frame.

There are some ideas that Brazil may soon resume US ethanol purchases. In the meantime, China had perhaps been expected to take on a bigger role in the U.S. market than it has after promising volumes earlier this year have not persisted.

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Ukraine's wheat export expected to break double record in 2022

27 October – Latifundist.com

The number of countries importing Ukrainian wheat for more than USD 10 thou. has increased from 32 to 50 in recent years. At the same time, wheat today is exported from Ukraine by more than 1,000 companies, Latifundist.com analysts report.

In January-September 2021, Ukraine delivered to foreign markets 13.1 mln t of wheat worth USD 3.15 bln. The price of wheat grew in the reporting period: the average price was 240 USD/t vs. last year's USD 198.

According to the Ministry of Agrarian Policy and Food of Ukraine, producers harvested 32.8 mln t of wheat in the 2021 crop year. This is a new all-time high for two reasons. Firstly, the total area of wheat in 2021 was significantly higher than last year — 7.1 mln ha against 6.5 mln ha. Secondly, weather conditions in the current production season were exceptionally favourable for wheat cultivation in Ukraine.

There is every reason to believe that Ukraine will set a double record for the export of wheat: both in value and in volume terms. Now the share of wheat in the total exports from Ukraine in 9M 2021, as per the State Customs Service data, is 6.5%. In 2020, it exceeded 7.3%.

In 2020, Ukraine was the 5th largest exporter of wheat with a USD 3.6 bln value of supplies. The U.S., Canada, Russia and the EU exported precede Ukraine in this ranking. Ukraine's share of the global wheat market in 2020 was 9.2%. The total volume of world wheat exports went beyond USD 39 bln. Within a decade, Ukraine has significantly expanded its presence on the world market.

Since the start of 2021/22, wheat export from Ukraine has increased by 12% YoY. The USDA in its October report left unchanged the projection for Ukraine's wheat export in 2021/22 at 23.5 mln t.

Wheat export from Ukraine in 2021/22 was limited to 25.3 mln t. The Memorandum of Understanding was signed by the Agrarian Ministry and grain market participants.

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Drought, Russian export tax cloud Kazakh trade flows

26 October – Graincentral.com

There is nothing like a drought, global pandemic, artificial trade barriers and an indignant neighbour to disrupt trade flows. While Kazakhstan will undoubtedly have enough wheat to meet its domestic requirements in the 2021-22 marketing year, the picture for grain imports and exports, in particular wheat, is opaque at best.

This season's winter crop harvest in Kazakhstan is all but complete, a dry seedbed at planting followed by an abnormally warm and dry growing season and numerous dust storms culminated in lower-than-average yields but above-average grain quality in most regions.

Kazakh farmers had harvested 15.8 million hectares (Mha) or 99.7 per cent of the forecast harvested area at October 22. The Ministry of Agriculture reported 16.1 million tonnes (Mt) grains and pulses had been reaped with an average yield of 1.02t/ha.

The October USDA World Agricultural Supply and Demand Estimates pegged Kazakhstan 2021-22 wheat production at 12Mt, down from its September forecast of 12.5Mt, almost 16pc lower than the 2020-21 14.256Mt wheat production estimate. The harvested area is expected to be 12.7Mha, the average yield at around 0.94t/ha.

The season started poorly with an unusually low soil moisture profile, forcing producers to plant deeper than usual in many regions. This resulted in late and irregular emergence in many fields. High temperatures and low rainfall in June led to poor tillering, weak plants and abbreviated stem elongation.

While the result was much lower production year-on-year, 90pc of the harvested wheat made food-grade quality, up from 83pc last year. The volume of high protein wheat with gluten content exceeding 28pc amounted to 74pc, up significantly from 60pc in 2020.

The USDA pencilled in Kazakhstan barley production at 2.5Mt in this month's WASDE update, unchanged from its September number but 31.7pc lower than 2020-21 output of 3.659Mt. The harvest area is forecast at 2.2 million hectares, putting yield at 1.14 tonnes per hectare.

Like wheat, barley production was challenged by a poor soil moisture profile through most of the growing season, with late sown crops performing the best. The practice of "snow fixing" or piling snow in ridges along the high end of paddocks so that it melts and runs into freshly sown fields pushed yields as high as two metric tonne per hectare in some districts of the Akmola oblast in the north of the country.

Domestic consumption of wheat is estimated at 6.3Mt in the 2021-22 marketing year, up from 6.25Mt in 2020-21. Food, seed and industrial use are forecast to be unchanged year-on-year at 4.8Mt, with the balance of 1.5Mt going into the stockfeed sector, up from 1.45Mt last season.

On the barley front, total domestic consumption is forecast to be 2.1Mt. At 1.8Mt, the stockfeed sector is the primary consumer in Kazakhstan, in particular the poultry industry. An additional 300,000t goes toward food, seed and industrial uses, with malt production for the beer industry a key end use.

Lower production means lower exports to ensure domestic demand is satisfied. The Kazakh government has resisted calls from the grain milling industry to introduce export duties on

wheat in a bid to limit exports and take the heat out of domestic prices. Nevertheless, Russian imports will certainly be required to meet export forecasts. According to the USDA, wheat exports will reach 7.4Mt in the 2021-22 marketing year, based on imports from Russia of 800,000t. Much of these imports will come from Siberia, where the costs of shipping across the border into Kazakhstan are substantially lower than trucking to ports on the Black Sea or in the far east of the country.

However, the USDA export estimate is much higher than local government and the Foreign Agricultural Service forecasts of around 6.5Mt, both based on imports from Russia of around 1Mt. But that import number is overshadowed by the 2Mt estimate from leading agricultural consultancy, Sovecon.

The introduction of the Russian export tax has undoubtedly increased the cross-border trade between Russia and Kazakhstan, but it has also led to widescale underreporting of grain movements. There is no requirement for trade within the Eurasian Economic Union (EAEU) to be inspected or weighed when transiting borders, and several Russian news agencies are saying wheat exports to Kazakhstan could exceed 4Mt this season. This led to a recent announcement of plans to inspect and weigh grain shipments transiting the Russia-Kazakhstan frontier.

There is nothing like a drought, global pandemic, artificial trade barriers and an indignant neighbour to disrupt trade flows.

Taking the USDA import number of 1Mt means that there is potentially an additional 3Mt of “tax-free” Russian wheat that could be “unofficially” exported out of Kazakhstan as whole grain or as flour to traditional trade partners in the region. Uzbekistan, whose own harvest was 8pc below the five-year average, is traditionally the nation’s biggest wheat export customer. It is forecast to import 3.5Mt in the current marketing year, up 20pc on the five-year average. It also mills Kazakh wheat for re-export to Afghanistan.

Afghanistan is usually the second-biggest customer, but despite government assurances, the clearing of financial transactions is a big concern under the recently established Taliban regime. Tajikistan and Iran, which we know has a higher-than-normal import requirement this year due to domestic drought, are other likely destinations.

China shares a 1783-kilometre border with Kazakhstan and is a critical emerging market for Central Asia’s biggest grain producer. However, persistent Chinese limits on rail and truck transport at the Kazakhstan-China border and unilateral COVID-19 quarantine restrictions on incoming trade are frustrating the Kazakhstani government.

In August, Kazakhstan’s rail authority reportedly announced restrictions on accepting cargo bound for the Chinese border, except in containerised shipments through the new transshipment terminal at the Dostyk-Alashankou border crossing. This significantly increases export costs, not to mention the global shortage of containers for such purposes.

There is nothing like a drought, global pandemic, artificial trade barriers and an indignant neighbour to disrupt trade flows. While Kazakhstan will undoubtedly have enough wheat to meet its domestic requirements in the 2021-22 marketing year, the picture for grain imports and exports, in particular wheat, is opaque at best.

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Aussie barley targets new African market

23 October – Queenslandcountrylife.com

The Australian malt barley industry is setting its sights on developing links with Africa in a bid to widen its network of customers.

A particular focus will be the Horn of Africa nation of Ethiopia.

While the average Australian beer drinker is unlikely to know it Ethiopia, a predominately Christian nation, has a rich history of brewing, with barley one of the major staple crops grown, especially in the highland regions.

Per capita consumption sits at 11.5 litres, with fiercely loyal attachment to brands such as Harar, Bedele and St George.

Light lager styles are generally most popular, but there is also a significant amount of stout, such as the Hakim brand, consumed.

The Australian Export Grains Innovation Centre (AEGIC) recently held a webinar for Ethiopian maltsters and brewers in collaboration with Barley Australia, Grain Trade Australia (GTA) and Grains Australia to demonstrate the end use qualities of Australian barley, along with practical advice on how to optimise value for the Ethiopian beer industry.

AEGIC barley markets manager Mary Raynes said she felt there was a natural fit for Australian malting barley in Ethiopia.

"There is good potential for growth in demand for beer in Ethiopia, and Australian malting barley is well placed to enter this market," Ms Raynes said.

"Australian barley has an excellent reputation globally thanks to a very strong breeding program and the robust accreditation program.

"There will be a healthy volume of malting barley available for export this season and we're expecting some strong interest from Ethiopia."

AEGIC is planning similar events targeting potential barley markets in the Americas, including Mexico, Columbia, Ecuador and Peru.

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Rains delay wheat planting, autumn grain harvest in China

20 October – Reuters.com

Constant rains in recent weeks have delayed wheat planting in main production regions in China, a government official said on Wednesday.

China had completed 26% of winter wheat planting across the nation by Oct. 19, slower by 27 percentage points than normal years, due to constant rains since September, according to Pan Wenbo, head of the planting management division under the Ministry of Agriculture and Rural Affairs.

The ministry will take "extraordinary measures" to tackle the "unfavourable impact and austere challenges" the rains have posed for harvest and planting, Pan said during a press briefing.

China's cabinet, the State Council, on Wednesday said authorities would work to ensure a "bumper" summer grain harvest next year, state broadcaster CCTV reported.

Measures taken to achieve this include doing a good job in drying and stockpiling grain, as well as in autumn and winter planting, CCTV said in its evening newscast after a State Council meeting chaired by Premier Li Keqiang.

Other measures include speeding up drainage of farmland, increasing supply of fertiliser and pesticides, and ensuring supply of electricity and diesel for grain drying, the report said, adding flood-hit areas will be entitled to disaster relief funds.

Pan's comments came as Beijing renewed a policy focus on food security following the COVID-19 pandemic and after prices of maize, the other main grain crop in China, soared on falling inventories and output, pushing up feed use of wheat and grains imports to record high levels. [read more](#)

"It is still hopeful that we will win a bumper harvest (of wheat next year) as long as we can plant before winter and follow up with proper management measures in the spring," Pan said.

Late planting would affect growth, while too much moisture in the land would cause more diseases for the crop, Pan added.

China has raised the minimum purchase price for wheat in 2022, part of an effort to enhance grain security, by bolstering farmers' interest in growing the grain.

The rains have also delayed harvest of autumn grains, which mainly include maize, soybeans and middle-late season rice, by 4 percentage points compared with normal years, and pushed up cost, Pan also said.

Heavy rains hit the maize harvest in northern China and damaged quality of the new crop, leading a government think tank to lower its estimates on China's 2021/22 maize output. [read more](#)

The rains mostly affected Huang-Huai-Hai river areas and northwestern China with limited impact on other main production regions including northeastern and southern China, Pan added.

Autumn grains output in total was set to rise, thanks to increased acreage, and more planting of high-yield maize, according to Pan.

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Algeria's purchases of Russian wheat confirmed, as import needs grow

20 October – Agrimoney.com

Demetra Trading confirmed longstanding rumours that Russia had exported 60,000 tonnes of wheat to Algeria, amid mounting expectations for the North African country's import requirements, following a drought-hit harvest.

Demetra Trading said that it had shipped 60,000 tonnes of wheat to Algeria from the Black Sea port of Taman, after the North African country in June resumed purchases from Russia, after a five-year hiatus.

The grain was shipped in two vessels, which Demetra said had been unloaded, and "accepted" by Algeria, which a year ago relaxed its import restrictions over insect damage, reopening the country, which is one of the top wheat importers, to Black Sea supplies.

For Demetra – which is controlled by VTB, in which the Russian state is the top shareholder – the deal represented further headway in diversifying export markets, which "is part of the company's development strategy", said Roman Kron, the group's general director.

Demetra last month revealed its first wheat shipment to Saudi Arabia, which also reopened to Russian supplies after a multi-year break.

For Algeria, the deal signals a diversification of suppliers following a poor-quality 2021 harvest in France, its main supplier.

Indeed, even within the EU, the country has shifted the focus of origins.

A report published overnight from the US Department of Agriculture bureau in Algiers said that while "Algeria was the largest non-EU destination for French soft wheat in August, with an initial estimate of 335,000 tonnes", Germany was picking up substantial volumes too. "German traders describe Algeria as becoming Germany's largest customer as a result of quality problems with French wheat."

Algeria faces enhanced import needs too, following a 2021 domestic harvest which the bureau, citing a rain shortfall, pegged at 2.50m tonnes - down 36% year on year, and below too the USDA's official estimate of 3.60m tonnes, although in line with a UN FAO figure.

Drought hit “all the provinces in the eastern and western areas including those with high production” in typical years, the bureau said.

“The persisting health crisis (Covid-19), and the lower domestic grain crops affected by drought obliged [Algeria] to purchase wheat despite an increase in international prices,” the bureau said, estimating the country’s imports in 2021-22 at 8.0m tonnes.

That would be the highest figure in four years, and an extra 850,000 tonnes above the level that the USDA officially forecasts.

The plight of Algeria - and of some other North African-Middle Eastern countries, notably Iran, which have also suffered drought-reduced crops – has begun attracting increasing market interest, coming at a time of diminishing wheat stocks available in major exporting countries.

Broker Benson Quinn Commodities said that “Middle East and North African weather is still adding demand as dry conditions persist and may impact trade flows in the region into next year.

“Iraq has already cut planted acres by half for next year, water for irrigation is not available, the acreage cuts nearly double their wheat import needs to 4.5m-4.7m tonnes from a usual 2.6m tonnes.”

Richard Feltes at RJ O’Brien reported that a “large portion of Middle East-North Africa” was “struggling” with dryness.

World Weather forecast that North Africa will be mostly dry this week, but added that rain was expected to develop next week in Algeria.

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China increases incentive for farmers to grow wheat

14 October – World-grain.com

In an effort to enhance its grain security, China recently raised the minimum purchasing price for wheat in 2022, Reuters reported.

A notice on the state planner’s website said the National Development and Reform Commission has set the 2022 minimum purchase price for wheat at \$357 per tonne, up from \$351 per tonne this year.

China, the world’s leading wheat producer at 134 million tonnes in the 2020-21 marketing year, buys wheat from farmers at the minimum price when the market price drops below that level to incentivize domestic production.

Earlier this year, the China Agricultural Sector Development Report declared that the country will be almost entirely self-sufficient in staple grains such as rice and wheat by 2025.

Despite its large wheat output this past year, China still doubled its wheat imports in 2020-21 to 10.6 million tonnes, which ranked second only to Egypt, the perennial leader in that category. The Foreign Agricultural Service of the US Department of Agriculture is forecasting 10 million tonnes in wheat imports in 2021-22.

Meng Jinhui, senior analyst with Shengda Futures, told Reuters that “the state attaches utmost attention to grain security.”

“It does not have a big impact on the markets in the short term,” Meng added. “But the key is that it can serve as the guiding direction, and bolster farmers’ confidence in growing the grain.”

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Argentine government slaps more control on maize exports

12 October – Mercopress.com

Argentina's Agriculture Minister has decided to up the number of requirements and restrictions on maize exports after the sector reached the exportable balance of 38.5 million tons, it was reported.

Maize producers and exporters complained additional requirements, restrictions and paperwork were set in place for the clearance of their goods to be shipped abroad amid rumours which ranged from an increase in export taxes to a ban -or cap- on international sales.

"Last week more than two million tons were anticipated. It is intended to order the last section of the year. Exports will not be closed, but more data will be requested," Agriculture Minister sources told the media.

Argentina is "at the limit in the supply" of maize, it was also reported.

The Ministry will now request exporters to submit export statements with "operations duly supported with their physical purchases and with nominated ships with an estimated date of arrival."

Thus, priority will be given to the entries of the companies that have the grain purchased and the ship assigned.

"There are 5 months to go before the maize for the new season begins to be harvested, and exports have already registered everything that could be exported," the ministerial sources added.

As the harvest was 60 million tons, the exportable balance reached 38.5 million, of which 96.5% came from the 9 agro-export companies. But last week more than 1.5 million tons were recorded, a high number for this time of the year, so it was decided to apply restrictions.

The Minister of Agriculture had described meat, wheat and maize as "cultural goods" and defended the need to "intelligently manage export balances."

The acceleration of annotations of sales abroad came after rumours about a possible increase in export taxes on maize from 12% to 15%.

"To continue intervening and bureaucratizing the markets is a terrible sign which brings distrust among producers. We have already lived it since April with meat and now with maize. Our country needs all of us to be able to work freely to produce, knowing that we will be able to sell," Argentine Rural Society (SRA) President Nicolás Pino said on Twitter. Agrifood producers are still awaiting the much-announced reopening of meat exports to China, which Minister Julián Domínguez had forecast would begin Oct. 4 but have not. It is in this scenario that the Ministry of Agriculture decided to limit maize sales.

The ministerial resolution lifting caps on exports to China is expected to be published this week in the Official Gazette, but some traders are sceptical, in view of President Alberto Fernández's tradition of interventionism.

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Brazil's 2021-22 maize output forecast at record 116.3 million tonnes

10 October – Hellenicshipping.com

Brazil's total maize production is forecast at a record 116.31 million mt for 2021-22, up 33.7% year on year, the country's national agricultural agency Conab said.

Brazil's 2021-22 maize crop will be marketed during February 2022-January 2023.

The expected increase in the country's maize output in 2021-22 is primarily due to a rise in yield, Conab said in a report.

Conab sees Brazil's maize crop yield rising by 27.7% year on year to 5.575 mt/hectare in 2021-22, while area is seen up 4.7% year on year at 20.865 million hectares.

In 2020-21, maize crops were hit severely by drought that negatively affected production. Brazil's maize consumption is seen rising to 73.68 million mt in 2021-22, from 70.93 million mt estimated for 2020-21, the report said.

Brazil's maize exports are also seen recovering in 2021-22 to 39 million mt, from 22 million mt forecast for 2020-21.

Currently, first maize crop planting is underway in Brazil.

The first maize crop in Brazil is planted during September-December and harvested in February-May, while the second crop is planted in February-March and harvested in June-July.

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Reports

Commodity Markets Outlook: Soaring Energy Prices Pose Inflation Risks as Supply Constraints Persist – World Bank

Energy prices soared in the third quarter of 2021 and are expected to remain elevated in 2022, adding to global inflationary pressures and potentially shifting economic growth to energy-exporting countries from energy-importing ones. The World Bank's latest Commodity Markets Outlook forecasts that energy prices—expected to average more than 80 percent higher in 2021 compared to last year—will remain at high levels in 2022 but will start to decline in the second half of the year as supply constraints ease. Non-energy prices, including agriculture and metals, are projected to decrease in 2022, following strong gains this year.

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