

MONTHLY NEWS REPORT ON GRAINS

FAO Trade and Markets Division

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Market News

Feed markets look to global harvests for incentives

25 February - AHDB

Feed markets have taken a breather over February, with grain prices falling from January highs. The majority of feed crops in the EU + UK have emerged from winter relatively unaffected by colder temperatures. Soft wheat production in the EU-27 is forecast 10.4Mt higher next season, at 129.6Mt according to Stratégie Grains, providing some price pressure as we move closer to harvest.

UK ex-farm prices declined over February. Spot UK feed wheat was quoted at £202.10/t, in the week ending 18 February. Spot UK feed barley was quoted at £160.10/t.

The February global supply and demand estimates (WASDE) from the USDA, detailed an increase of 2.7Mt to global maize ending stocks, forecast at 286.5Mt. This was due to lower usage in the EU, Japan and South Korea. Last season, global maize ending stocks were at 303.0Mt. The lower forecast figure this season has supported markets. As well, large Chinese purchases of maize have increased global prices but we are starting to see a degree of pressure appear.

US maize planted area is forecast to increase by 0.5Mha when planting begins in April. This comes as little surprise given the high market prices of maize currently. Chicago maize futures (nearby – 19 Feb) are quoted at \$213.67/t, \$63.87/t higher than this time last year. The Brazilian second crop maize area is forecast to increase too to 14.35Mha, a rise of 4.4% compared to 2019/20, according to Conab. Strong domestic prices of maize have supported the increase in planting. Rainfall has slowed the Brazilian soyabean harvest taking place at the moment. This is important as the maize crop is planted following the soyabean harvest. Brazilian safrinha maize planting was 20.0% complete as of 19 Feb, compared to 51.3% this time last season. Persistent delays could reduce the final maize planted area. If this occurs then global maize prices could increase.

Weather is also having an effect on the US winter wheat crop. A severe US snowstorm has brought freezing temperatures to fields. The magnitude of crop damage is unclear, but temperatures approached winter kill levels in some areas. Severe damage to the winter wheat crop could see global wheat prices increase.

Oilseed markets have seen prices stabilise following the steep decline throughout January. This comes as delays to the ongoing Brazilian harvest lengthen the time for new-crop soyabeans to hit markets.

Soyameal prices have also declined over the month. Chicago soyameal futures (May-21) were quoted at \$466.94/t (£333.20/t), this is down \$3.09/t (£10.54/t) from 25 January. UK soyameal prices (48% protein, nearby ex-store Liverpool) also declined, down £26.00/t from 22 January, at £411.00/t

The February WASDE reduced global soyabean ending stocks, forecast at 83.4Mt. If we exclude China, then stocks are estimated at 54.8Mt, the lowest since 2013/14. The fall was due to lower US and Brazilian stocks amid a rise in global exports. Rampant Chinese purchases and imports have supported a rise in oilseed meal prices this season.

Initial estimates for US soyabean planting suggest a large increase in area when planting begins in April. Though early, planted area is estimated at 36.4Mha, up from 33.6Mha last season. If realised, this would be very close to the record 36.5Mha area in 2017. Weather conditions in the run up to the beginning of planting will offer a degree of market sentiment which could affect prices.

Inclusion of soya cake and meal in UK compound feed production this season (Jul-Dec) has increased 1.7%. This comes as imports of soyabeans into the UK have increased 44% over the Jul-Dec period, on the year. Pig feed production has increased 5.4% this season to December. This could be a result of animals reportedly remaining on farm for longer than expected, with abattoir backlogs.

Soyabean prices will depend on further Chinese purchases for support. As the presence of a record Brazilian crop and increases to US acreages could pressure prices.

Sterling has strengthened considerably over the month with economic positivity around vaccination progress in the UK. It is hoped lockdown measures can ease ahead of other countries leading to a return in consumer spending. The US dollar has been trending downwards following expectations of inflation.

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Aussie farmers may win from Russian taxes

24 February – The West Australian

Australian grain growers could cash in on Russia's beefed up wheat export taxes with a record local crop still on the cards.

ANZ's latest agricultural commodity report has found Russia's decision to impose a wheat export tax of \$80 a tonne from March until June could benefit Australia.

Moscow has imposed the tax in a bid to reduce domestic wheat prices and increase availability for food and feed.

As a result, Russian wheat is more expensive than Australia varieties for the first time.

"The move by Russia, the world's largest wheat exporter, to impose export taxes on its wheat will bring a renewed focus to Australian wheat," ANZ's Michael Whitehead said on Wednesday.

While the ongoing wet season may have slowed the harvest in parts of Victoria, forecasts remain on track for the largest grain crop ever.

Prices could also rise with China buying strongly in grain markets to feed its domestic pig herd, which is recovering from African swine fever.

Cattle and beef prices are tipped to stay well above long-term averages with many producers enthusiastically rebuilding herds decimated by the drought.

But the report warns trade tensions with Beijing could pose risks for the so-far unscathed wool market where China takes 70 per cent of all Australian exports.

A significant fall in Australian exports to China could hit demand and drive down prices with no other country having the capacity or need to import all of Australia's clip.

China's high demand for Australian wool could prevent any trade strikes with most industry players confident it will not suffer the same actions as other industries.

The ANZ research looks at alternative markets for Australian commodities noting barley exports were redirected to Saudi Arabia, Mexico, Thailand and Vietnam after Chinese tariffs were imposed.

It says grain, dairy and, to a lesser extent, meat face an easier job of finding alternative markets than products such as wine and lobster.

In 2020, China was the biggest export market for Australian wine but the punitive tariffs have made the industry arguably the most affected.

"This is with the possible exception of Australian rock lobsters - which go perfectly with a Margaret River chardonnay," the report says.

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India set for record wheat output

23 February – RT.com

India is set for record wheat output in the current crop year, due to higher acreage, conducive weather, and fewer crop pest attacks, according to the chief of the Directorate of Wheat Research at Karnal, Gyanendra Pratap Singh.

He told the Economic Times that "Production of the food grain is likely to reach 115 million tons compared with 107 million tons in the previous year, looking at the crop position in major growing states of Uttar Pradesh, Madhya Pradesh, Punjab and Haryana."

The current crop year runs from July 2020 to June 2021, and wheat harvesting in the country is set to begin by the first week of March. According to Singh, there have been no reports this year of any crop diseases or pest attacks, and the current weather conditions will lead to higher yields.

Analysts say the bumper production in the rabi season (crops are sown in mid-November and harvested in April/May) and higher carryover stock by government procurement agencies should ease pressure on households. Over the last two weeks, wheat flour manufacturers have reduced prices by up to 12 percent.

"With expectation of a higher crop over the previous year, there is pressure on the market and prices remain low, which we are passing on to the consumers. This is also helping us to push sales in the last quarter," said Angshu Mallick, deputy chief executive of Adani Wilmar.

"In the long run, prices will see another fall in May-June after the crop is harvested and the grain dried of its moisture content," added Udit Jain of the Delhi-based Rajdhani Group.

Wheat production in India has been increasing steadily since 2016-17. Government data showed the acreage under wheat has increased by three percent over the previous year, to 34.63 million hectares.

According to Prerana Desai, the head of rural and corporate services research at Edelweiss, higher production of the food grain can make India a competitive player in the export market, as well as ensuring stable domestic prices. Desai, however, warned that a sudden increase in temperature or rainfall during the harvest period in March and April could impact the crop position.

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South Africa's 2021 maize output expected to rise 10 percent

22 February – Reuters.com

South African maize farmers are expected to harvest 10% more of the staple crop in the 2020/2021 season compared with the previous season, despite heavy rainfall in parts of the country, a Reuters survey showed on Monday.

South Africa's Crop Estimates Committee (CEC) is expected to peg maize production at 16.872 million tonnes for the 2020/2021 season, up from the 15.300 million tonnes planted last season, an average estimate of five traders and analysts surveyed showed.

"Although substantial rains in January could have compromised maize quality in some production regions, our view is that the yield will offset potential quality issues. Prices are expected to stay at export parity, currently trending lower due to the strength of the rand," said Marlene Louw, senior agricultural economist, at Absa Agribusiness.

Heavy rains, due to cyclone Eloise which hit Mozambique last month, led to waterlogged farmlands in parts of South Africa's maize belt.

The survey expects the crop to consist of 8.929 million tonnes of white maize, used mainly for human consumption, and 7.943 million tonnes of yellow maize used mainly in animal feed.

USDA sees US maize, soybean output rising on year in 2021-22

22 February - Platts

The production of US maize and soybean is likely to rise on the year in the 2021-22 marketing year (September-August), the US Department of Agriculture said in its Grains and Oilseeds Outlook Feb. 19.

Maize production in the US in 2021-22 is estimated at 15.15 billion bushels, up 6.8% from 2020-21's estimated output of 14.18 billion bushels, while soybean production is set to rise 9.4% on the year to 4.525 billion bushels.

"Current new crop soybean futures prices relative to maize, supported by strong Chinese demand and the tightest stocks-to-use ratio since 2013-14 are expected to boost soybean plantings, while higher maize prices are also expected to encourage planting," the report said.

Area under maize is seen rising by 1.2 million acres to 92 million acres in 2021-22, and soybean acres are seen rising to 90 million acres up 6.9 million acres on the year.

Expectations of return to a normal weather is also supporting higher yield estimates. The USDA has estimated US 2021-22 maize yield at 179.5 bu/acre up 4.4% from 2020-21, while soybean yield is seen at 50.8 bu/acre, up 1.2% on year.

The USDA has estimated US maize exports in 2021-22 at 2.65 billion bushels, slightly higher than 2.6 billion bushels estimated for 2020-21. "Maize exports are up reflecting expectations of global trade growth and continued robust demand from China," USDA said. US maize ending stocks for 2021-22 is seen at 1.55 billion bushels, up 3.3% on year, while domestic consumption is also seen rising to 12.475 billion bushels from 12.025 billion bushels in 2020-21.

Estimates for maize used for ethanol and feed and residual are also seen higher on the year in 2021-22. Maize used for ethanol estimates are seen at 5.2 billion bushels in 2021-22, higher than 4.95 billion bushels in 2020-21, while use for feed and residual is seen at 5.85 billion bushels, higher than 5.65 billion bushels this year.

"Maize used for ethanol is projected up 5% relative to a year ago, based mostly on expectations of increased motor gasoline consumption following the COVID-19 related weakness seen during 2020-21," the report said.

The season-average maize price received by producers is forecast down 10 cents to \$4.20/bushel, USDA said.

Soybean exports from the US in 2021-22 is seen at 2.2 billion bushels, down 2.2% on year, according to the USDA. "Soybean exports for 2021-22 are projected down from 2020-21 as despite increasing global import demand, US market share is likely to decline on limited exportable supplies," the report said.

Meanwhile, US soybean ending stock is estimated at 145 mil bushels, up 20.8% on year.

The soybean season-average farm price is projected at \$11.25/bu, up slightly from 2020-21. US 2021-22 wheat production is projected almost unchanged from 2020-21 at 1.827 billion bushels as higher area offsets a lower yield, USDA said in its outlook.

The total wheat area for 2021-22 is projected at 45.0 million acres, up 651,000 acres from the previous year but still below the 5-year average.

Higher expected net returns for maize and soybeans in the Northern Plains is seen reducing combined spring and durum wheat plantings for 2021-22.

Several regions, particularly Europe, where production is expected to rebound significantly, result in greater competition for US exports in 2021-22.

US 2021-22 wheat exports are projected at 925 million bushels, down 6.1% on year, the report said.

However, lower exports are expected to more than offset higher domestic use.

The US domestic use is projected higher for wheat, primarily on increased feed and residual use as the narrowing wheat-maize price spread is expected to increase wheat feeding this summer, the report said.

Lower beginning stocks combine with a virtually unchanged crop size is expected to reduce 2021-22 wheat supplies by 6% to 2.793 billion bushels, a seven-year low, USDA said.

“With supplies projected to decline relatively more than total use, 2021-22 ending stocks are reduced to 698 million bushels. This is 17% below the previous year and the lowest carryout level since 2013-14,” USDA said in its outlook.

The tighter balance sheet supports a 2021-22 season-average farm price of \$5.50 per bushel, up 50 cents from 2020-21, the report said.

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China's hunger means smaller than expected soy maize stockpiles

19 February – Bloomberg.com

Chinese bondholders are gaining more power in the corporate restructuring process, underscoring a renewed push by authorities to reform the nation's \$5.2 trillion credit market.

Following a slew of defaults late last year that rattled markets, disgruntled creditors have successfully pushed for borrower concessions that would have seemed out of reach in China only a year ago. They reversed a major automaker's plan to make a profitable unit less accessible to bondholders, forced an energy producer to sweeten a debt swap offer and secured an unprecedented court ruling that required a construction company's underwriter, rating firm and auditor to compensate individual bondholders.

Although limited in scale, the cases are fueling optimism that creditors will enjoy a more equal playing field as defaults in China become more common. Now that policy makers are gradually dialing back financial support to distressed borrowers, they're under pressure from local and international investors to make the restructuring process more fair and transparent. It's part of a broad reform push that includes stiffer punishments for bond-market wrongdoing and a green light for non-bank institutions to form creditor committees.

“As a long-time distressed asset investor in China, I can see that creditors are clearly becoming more aggressive in defense of their financial interests,” said Brock Silvers, chief investment officer of Kaiyuan Capital. “Regulators have been generally supportive as they attempt to improve the efficiency of credit markets.”

As a result, many borrowers are facing hard choices as regulators turn away from bailouts and investors clamor for more rule-based, less political enforcement options, Silvers added.

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EU wheat crops not seen suffering big hit from cold spell

18 February – Hellenicshipping.com

Severe cold across Europe in the past week is unlikely to have inflicted significant damage on wheat crops that had built up winter sturdiness and were often insulated by snow, analysts and traders said.

Although frost impact cannot be fully determined until crops emerge from winter dormancy, the expected absence of major losses in the European Union could keep the

exporting region on track for a larger harvest this year, particularly after a rebound in sowing in top EU grower France.

“In France, there shouldn’t be much impact and we’re sticking with a scenario of pretty decent harvest yields,” said Vincent Braak, crop analyst with Strategie Grains.

Like other European countries, France observed double-digit negative Celsius temperatures in some areas last week, levels that can potentially hurt wheat crops.

However, rapeseed sown during late-summer drought and some spring barley drilled early before winter were more at risk than sturdier wheat, according to traders and analysts.

The French farm ministry last week raised its estimate of the country’s winter soft wheat area for the 2021 harvest to 4.86 million hectares, up 15% from the previous year.

In central Europe, snow was expected to have limited any negative effects from lows of around minus 20 degrees Celsius (-4°F) in Germany and Poland.

“The frosts are deep but wheat has generally good snow cover throughout Germany and I am not expecting significant problems with frost damage,” one German grains analyst said.

“Temperatures this low are not unusual but winters have been so warm in recent years that we have forgotten that long frosts are possible.”

Germany’s winter wheat sown area for the 2021 harvest rose 2.7% on the year to about 2.83 million hectares, according to an official estimate in December.

In Poland, official estimates project the winter wheat area little changed on the year at about 2 million hectares, although Wojtek Sabaranski of analysts Sparks Polska said the area may be slightly smaller after more winter rapeseed drillings and a late end to maize harvesting.

“No major winterkill is expected following this cold event,” he said. “In most parts of Poland crops were protected by sufficient layers of snow.”

Warmer weather this week has removed the immediate threat of frost damage in much of Europe, although Strategie Grains’ Braak said some damage may have occurred in the Baltic states.

Heavy rain and snow this winter could benefit European crops later by replenishing ground moisture, although a wet spring could conversely lead to damaging soil saturation, Braak added.

Soggy conditions in former EU member Britain were starting to temper yield expectations, said CRM Agri analyst Peter Collier.

“Looking out at now melted and waterlogged fields, markets are losing confidence in the prospects for above average yields and an exportable surplus next season,” he said.

Collier estimated planted area had risen by 25% to 30%, year-on-year, from the prior season.

The previous year’s rain-hit sowing campaign led to a plunge in harvest output and a wave of imports.

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Russia wheat exports surge ahead of export curbs

16 February – Argusmedia.com

Russia exported 1.6mn t of wheat over the week, taking total exports since the start of the marketing year in July to 32.1mn t, around 31pc higher than a year earlier, according to data from its veterinary and phytosanitary surveillance service.

Wheat shipments to Egypt and Turkey — the largest buyers of Russian wheat — stand at about 7.1mn t and 5.8mn t, respectively, up by 600,000t and 300,000t on the week.

Market participants expect wheat exports to slow after the Russian government launched yesterday a €25/t duty on wheat shipments, which will be raised to €50/t from 1 March. But the full impact of export duties is likely to be seen in the next marketing year, when shipments out of the country could fall sharply following the introduction of a floating export tax from 2 June.

Barley exports from Russia remained strong in the week, reaching 100,000t, taking total volumes to 4.3mn t for the season, up by 50pc year on year. Russian maize shipments rose by 100,000t on the week, with total exports this season standing at 1.5mn t on 11 February. Total grain exports from Russia stand at 38.1mn t for the season, with 1.8mn t having been shipped in the week to 11 February. But for oilseeds, Russia's soybeans, sunflower seeds and rapeseed exports were almost unchanged on the week, with total shipments this season now at 900,000t, 600,000t and 500,000t, respectively.

The slowdown in Russian oilseed exports is being blamed on the 30pc export duties that the government introduced in January and February, and which remain in place until 30 June 2021.

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Australia cuts sorghum hopes – even as wheat crop lifted to record high

16 February – Agrimoney.com

Lingering drought, followed by excessive rains, have slowed Australia's prospects of recovery in sorghum output, Abares said, even as they hiked estimates for the newly-finished winter crop harvest

Australia's official crop bureau cut by 200,000 tonnes, to 1.52m tonnes, its forecast for the country's forthcoming sorghum harvest, citing some persistence in key eastern growing areas of the dryness which depressed the previous crop to 298,000 tonnes – the lowest on data going back to 1974-75.

In Queensland, the top growing state, "area planted to grain sorghum in 2020–21 was constrained by below-average rainfall throughout [southern hemisphere] spring," the bureau said.

In New South Wales, the only other state where sorghum is grown on any scale, Abares also cited "low levels of upper layer soil moisture in the main planting window", besides the "low availability of fallow land", after farmers maximsed winter crop sowings.

Australia's sorghum area for 2020-21 at 511,000 hectares, was downgraded by 80,000 hectares from December – albeit remaining well above the 143,000 hectares seeded last season.

For rice too, Abares cut hopes for Australia's next harvest, after sowings - while soaring to 46,000 hectares from 6,000 hectares last season – fell short of the 77,000 hectares which had been expected.

While noting an "increase in the availability of irrigation water" following the return of rains to many areas early in 2020, Abares again cited a lack of available land, after a strong winter grains season in New South Wales, the main rice-producing state.

"Planting rice after wheat in the same season is largely infeasible given the wheat harvesting window in southern New South Wales."

However, for cotton, Abares raised its forecast for Australian output this season, by 56,000 tonnes to 562,000 tonnes, with sowings, at 295,000 hectares, seen 41,000 hectares above initial expectations – and at five times the level of last season's area.

"The estimated increase in planted area is driven by increased availability of water in public dams and storages on-farm," the bureau said, although noting that sowings had still come in below average levels, a reflection of persistently low water reserves "in some regions". And, among winter crops, Abares lifted estimates for the latest barley, canola and wheat crops too, noting yields "continuing to exceed initial forecasts as harvest progressed, particularly in New South Wales and Western Australia".

For wheat, the harvest estimate was lifted by 2.17m tonnes to 33.34m tonnes – a record high, exceeding the 31.8m-tonne crop reaped four seasons ago, before a longstanding drought set in.

The barley harvest was upgraded by 1.13m tonnes to 11.96m tonnes, the second highest on record, behind only the 2016 crop.

Canola output was estimated at 4.05m tonnes, an upgrade of 975,000 tonnes, and also a four-year high, up from a 2.33m-tonne crop last season.

An upgrade to the wheat harvest had been largely expected among investors, with widespread comment that the US Department of Agriculture's estimate of 30.0m tonnes, as restated last week, was too low.

However, the Abares figure is above levels of roughly 32m tonnes that contacts which Agrimoney spoke too had talked of.

Abares will next month, in a separate briefing, unveil estimates of how it expects the revised crop production levels, alongside world market factors, to influence Australia's crop export performance.

Australia is the world's third-ranked sorghum exporter, and fourth biggest cotton exporter, besides being a major shipper of barley, canola and wheat.

Thoughts are already beginning to turn too to sowings of winter crops to be harvested late in 2021, with hopes of favourable sowings conditions.

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Argentine truckers end 20-day strike, freeing barley headed for China

9 February – Nasdaq.com

Trucks owners grouped in the informal TUDA association (Transportistas Unidos de Argentina) began blocking highways last month, making it particularly hard for barley to reach export terminals in the Buenos Aires port of Necochea.

"There were two China-bound Panamax vessels at Necochea port waiting to load. The buyers were worried because they need malting barley by the end of February," said Argentine barley market consultant Agustin Baque.

"If the strike continued, the buyers would have had to switch to another supplier, like Canada or France," he said.

China is scooping up millions of tonnes of barley from France, Canada and Argentina to feed livestock, as shipments from China's usual barley supplier, Australia, have fallen victim to a trade fight between the two countries.

The Argentine drivers were protesting what they called high taxes and highway tolls, as well as low pay and fast-rising fuel costs in the inflation-racked country. TUDA spokesman Santiago Carlucci told local media that the protest had ended.

He could not be reached for comment, but the CIARA chamber of export companies and the Bahia Blanca grains exchange confirmed that the protest had ended.

Argentina's main agricultural export hub of Rosario was not heavily affected by the truckers' protest. Local authorities in Rosario did not allow strikers to block roads near the city.

Most of Argentina's maize and soy, the country's top two cash crops, are shipped from Rosario. The barley belt is in southern Buenos Aires province, far from Rosario, making Bahia Blanca and Quequen Argentina's main transit points for the grain. The strike started bogging down operations at the port on Jan. 19, said Eugenia Rul, head analyst at the Bahia Blanca grains exchange. "In the affected period, 388 trucks entered the port, equivalent to approximately 11,640 tonnes of grain. In the same period last year, 7,654 trucks entered port carrying 229,620 tonnes. The drop was 95%," she said

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Reports

February 2021 CropWatch Bulletin - CropWatch

February 2021 CropWatch Bulletin is based mainly on current remote sensing inputs in addition to detailed and spatially accurate reference data about crops and their management. Focusing on the months of October 2020 to January 2021, chapters cover global, national, and regional level agroclimatic conditions and the condition of crops that were growing during this time. For China, the bulletin presents crop conditions for each of seven key agro-ecological zones, an updated estimate of trade prospects (import/export) of major crops. The focus section reports on the production outlook of major cereal and oil crops countries in the Southern Hemisphere and some tropical and sub-tropical countries, recent disaster events and an update on El Niño or La Niña.

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World Agricultural Supply and Demand Estimates – USDA

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