



Sunflower seeds, Eastern Europe

Little optimism despite promising forecasts

SOFIA/KIEV. A record acreage in Ukraine and favourable weather conditions are boosting yield forecasts for the coming season. Bulgarian sunflower seed traders, however, remain cautious and shy away from taking risks.

Restraint continues

Driven by fears of profit slumps and losses, many sunflower seed traders are extremely cautious when it comes to offers for the new crop. While a lot can still happen in the coming weeks until the harvest starts, some market players are currently more confident than others that sunflower seed production should be significantly better than in 2020. “There is a lot of tension about the new crop,” says a Bulgarian sunflower seed trader, “most suppliers are confused and refuse to give offers.” Traders who are willing to offer prices are hesitant to do so and include a risk premium, which makes prices rather expensive. What can actually be expected at the moment, one trader said, is a lower supply of striped sunflower seeds, as many farmers have preferred to grow the black variety this year.

Promising crop forecasts

Otherwise, he said, there was little cause for concern at the moment. The weather conditions in Bulgaria were relatively favourable, only the rainfall rate was comparatively high at the moment. However, this would only become a problem if the rains continued for several weeks. At the same time, UkrAgro-Consult reports that the acreage for sunflower seeds

in Ukraine is said to have reached a new record, together with the forecast of an above-average yield, hopes are rising that the situation in the sunflower seed market will be much more relaxed than in the current season. As Russia’s acreage also turned out to be larger than planned, it is questionable whether the country can afford to maintain the 50% export duty on sunflower seeds until the end of August 2022 as planned, should the crops be able to recover from the last year’s deficit.

Prices for the new crop need to decline

Prices for prompt shipments of Bulgarian bakery kernels remain at last week’s level of EUR 1.04-1.07/kg DDP Germany. The subdued offers for the new crop are also stable, but significantly more expensive than in previous years. However, market players do not rule out that prices could fall below EUR 0.90/kg DDP Germany again by September.

Sunflower kernels, Bulgaria

| Type | EUR/kg |
|--------------------|-----------|
| Bakery, 2020 crop | 1.04-1.07 |
| Bakery, 2021 crop | 0.94-0.97 |
| <i>DDP Germany</i> | |

China is running out of organic goods

In the Chinese sunflower seed market, there are virtually no more offers for organic seeds. Export prices for sunflower seeds, confection from China are at a level of USD 1,820/mt CIF Hamburg.

Flaxseed, Eastern Europe & Canada Kazakhstan and Russia are longing for rain

NUR-SULTAN/OTTAWA. In the growing regions of Kazakhstan and Russia, heat and drought are affecting the plants. Meanwhile, Canadian flaxseed is increasingly gaining ground in the European market.

Heat damage cannot be ruled out

According to the Kazakh Grain Union (KGU), spring sowing for the coming flaxseed crop has been completed, and around 1.39-1.40 million ha are expected to have been sown, which would represent an increase over last year. However, it is currently questionable whether the production result will also exceed last year's level. Unfavourable weather conditions are worrying market players, as heat and lack of rainfall are causing problems for the plants. If it does not rain soon, the soil drought could have a negative impact on crop development and yield.

However, it is not only Kazakhstan's crops that are struggling with the weather. In large parts of Siberia, where more than half of Russia's flaxseed crop is grown, similar debilitating conditions prevail. Russian analysts had forecast a year-on-year increase in production to 850,000 mt (2020: 788,000 mt), but it remains to be seen whether this is possible under current conditions. Indeed, weather services are reporting rainfall and lower temperatures in this part of Russia for the end of this week.

The flaxseed market remains quiet for the time being and prices in the European spot market are trending slightly downwards. Brown flaxseed with a 99.9% purity is trading at EUR 810/kg DDP Germany, for golden flaxseed the price indications are EUR 845/kg DDP.

Flaxseed, Eastern Europe

| Quality | EUR/mt |
|----------------------------|---------|
| Brown, 99.9%, DDP Germany | 810 |
| Golden, 99.9%, DDP Germany | 845 |
| Brown, 97%, FCA Kazakhstan | 590-600 |
| <i>Trade sources</i> | |

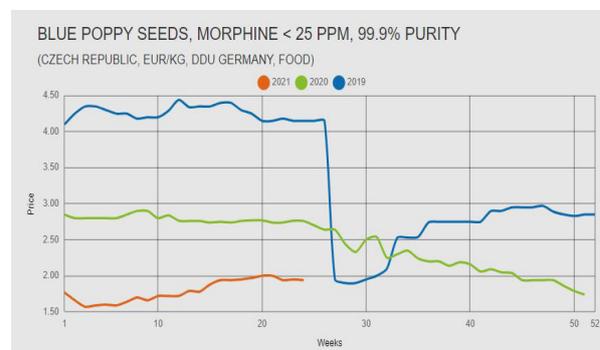
Canada's exports to Germany increase

Canada is managing to rehabilitate itself as a supplier to the European market this season, which is

also reflected in the import data for Germany. In total, Germany imported 100,582 mt of flaxseed in the first eight months of the current marketing year, about 12% less than in the same period in 2019/2020. While imports from Kazakhstan fell only minimally to 30,124 mt, Germany reduced imports from Russia by almost half to 20,073 mt. This shrinks the lead over third-placed Canada to less than 2,000 mt, as the country exported 3,847 mt and therefore more than 800 mt more flaxseed to Germany in April 2021 alone than in the first eight months of the previous season. This means that shipments this season have increased six-fold to a total of 18,236 mt.

Blue poppy seeds, Czech Republic Significant price reductions expected for the new season

CHRUDIM. The outlook for the Czech poppy seed crop in 2021 remains optimistic, but prices for prompt shipments are still at high levels. Meanwhile, Germany has reduced its import volume by more than 10% since the start of the season.



New crop from EUR 1.70/kg

The poppy seed season 2020/2021 is coming to an end. Due to the delays in this year's sowing, it is currently reckoned that farmers will not be able to start harvesting until the beginning of August. The first larger delivery quantities are therefore not expected to be available on the market before September. According to unofficial estimates, the acreage is similar to last year's at around 40,000 ha, and thanks to the current good weather conditions, the outlook for the crop result is quite positive. As usual, however, the actual size of the crop will only be known after the harvest.

The offers for prompt shipments from the 2020 crop are still surprisingly high at EUR 1.90-1.94/kg FCA Czech Republic, with some traders justifying this with the lower availability of higher-quality blue poppy seeds. For the new crop, prices are currently around EUR 1.70/kg.

Blue poppy seeds

| Origin | Price |
|---|------------------|
| Czech Republic, <20 ppm morphine, FCA CZ, 2020 crop | EUR 1.90-1.94/kg |
| Czech Republic, <20 ppm morphine, FCA CZ, 2021 crop | EUR 1.70-1.88/kg |
| Turkey, <20 ppm morphine, FOB Izmir, 2020 crop | USD 2.60/kg |
| <i>Trade sources</i> | |

Germany cuts imports

Germany has reduced its poppy seed imports by 11% this season. Although interest in Czech poppy seeds increased again after the hesitant start to the season in recent months, so that the volume of imports rose by 4% year-on-year, shipments from other countries recorded significantly lower values. Imports from Turkey declined by 28% to 303 mt and deliveries from re-export countries such as the Netherlands were also unable to keep up with last year's results.

Sesame seeds, India

High cultivation potential due to adjusted MSP

NEW DELHI. Indian sesame seed traders were able to win a large share of the South Korean sesame seed tender this week, while exports to Europe are only slowly increasing.

India wins the bid

With the exception of 600 mt of sesame seeds from Niger, Indian exporters are virtually the sole winners of the current sesame seed tender. They are authorised to ship a total of 11,900 mt of sesame seeds to South Korea. Considering the good summer crop and the faltering demand from overseas, this is a ray of hope for the market.

Good crop year expected

The Indian Oilseeds and Produce Export Promotion Council (IOPEPC) estimates the result of this year's summer crop at around 100,000 mt, market players even expect up to 120,000 mt. This should secure part of the demand until the main crop in autumn. The Indian government has increased the minimum support price (MSP) for sesame seeds from USD 0.938/kg to around USD 1.00/kg with the start of the kharif harvest this autumn. Market players reckon that this could encourage farmers to grow more sesame seeds this autumn. In the Indian origin, prices declined significantly compared to last week, but rose again slightly towards the end of the week after the tender result was announced.

Sesame seeds, India (non-EU quality)

| Type | USD/mt |
|----------------------------|--------|
| Hulled, 99.95%, FOB India | 1,460 |
| Hulled, 99.98%, FOB India | 1,555 |
| Natural, 99.95%, FOB India | 1,221 |

Sesame seeds, India (EU quality)

| | |
|-------------------------|-------|
| Hulled, 99.95%, CIF EMP | 1,815 |
| Hulled, 99.97%, CIF EMP | 1,835 |
| Hulled, 99.98%, CIF EMP | 1,855 |
| <i>Trade sources</i> | |



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German imports from India recover only slowly

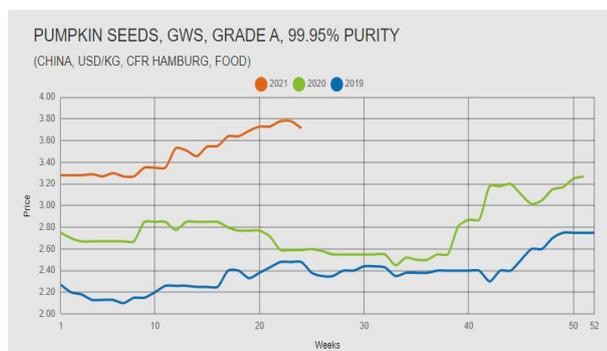
Germany has made up for the import deficit caused by the problems with Indian sesame seeds this season, so that the import volume in the first eight months of this season exceeded a result of 25,000 mt, as in the previous year. However, not only did shipments from India halve to 3,370 mt, Nigeria also exported about a third less sesame seeds to Germany than in the same period last year. However, this was compensated by growing imports from countries such as Guatemala, China, Egypt, Paraguay and Turkey.

Between January and April 2021, imports from India amounted to just 1,051 mt, which is not even a quarter of what was imported into Germany in the first four months of last year. Instead, shipments from Guatemala, China, Egypt, Somalia and Pakistan came to the fore during this period.

Pumpkin seeds, China

Market shows low trading activity

BEIJING. There is hardly any trade on the Chinese pumpkin seed market. Traders are hoping for higher domestic demand in July.



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Slight price declines - with one exception

There is hardly any movement on the Chinese pumpkin seed market at the moment, but this is not unusual for the summer months. Demand is very weak as most buyers have already stocked up for the rest of the year and are waiting for the new crop to arrive. Export prices are holding steady with a slight downward trend and are currently at USD 3,715/mt CFR Hamburg for GWS kernels, grade A. Only for Shine Skins, grade AA, a slight price increase of USD 5.00/mt has been observed.

Pumpkin kernels, China

| Type | USD/mt |
|----------------------|--------|
| GWS, grade A | 3,715 |
| GWS, grade AA | 3,935 |
| Shine Skin, grade A | 3,715 |
| Shine Skin, grade AA | 3,865 |
| CFR Hamburg | |

Possible price increases from July

The traders' hopes are currently pinned on the Chinese domestic market. Experience shows that increased buying interest is expected at the end of July - as the new crop will not be available by then, there could well be price increases for goods from the old crop.

According to market players, export prices are likely to remain stable for the time being, although much depends on freight costs. These are currently at an extremely high USD 6,000 for a 20' FCL from China to Hamburg; as soon as they normalise, this will also be reflected in the prices. At present, however, exporters are not very confident that this will happen anytime soon.

Mustard seeds, Russia & Canada

Canada reduces cultivation forecast by 10%

OTTAWA/MOSCOW. Canada is by far one of the most important mustard seed suppliers for the EU. However, high prices and lower availability have led to declining imports into the EU. Now, contrary to previous expectations, the Canadian authorities have also significantly reduced the cultivation forecast for 2021.

Acreage smaller than expected

When StatCan published the first crop forecasts for the 2021/2022 mustard seed season at the beginning of the year, they were still reckoning a year-on-year increase in cultivation of more than 50% to 160,000 ha. In the current report by Agriculture and Agri-Food Canada, however, the acreage was reduced to 145,000 ha - which would still represent an increase of almost 40% compared to last year. Saskatchewan and Alberta each account for 75% and 24% of the sown area, respectively. Yield expectations have been raised from 0.94 mt/ha to 0.95 mt/ha, but are still behind last year's average of 0.98 mt/ha. Based on the current figures, experts expect a mustard seed production of 133,000 mt, which would roughly correspond to the 2019 crop and would even exceed last year's result by more than a third. However, due to the lower carry-over stocks from the current season, the average price of CAD 885/mt is even set CAD 25/mt higher than this season.

Russia can compensate for EU import deficit

In 2020, the EU imported 117,778 mt of mustard seeds (12075090 Mustard seeds, whether or not broken (excl. for sowing)) from third countries. Thanks to a significant increase in shipments from Russia by 65% to 52,929 mt, deficits in imports from important growing countries such as Canada (-20% to 29,692 mt), Ukraine (-12.5% to 17,289 mt), Uruguay (-22% to 11,634%) and Kazakhstan (-69% to 3,097 mt) were largely offset. Since the start of the 2020/2021 season, Germany has imported just under 20,000 mt of mustard seeds, a third less than in the same period last year.

Shipments from Russia remained relatively stable at 11,888 mt, while imports from Ukraine and Canada each declined by 53% to 4,814 mt and 72% to 1,178 mt respectively, and Kazakhstan's exports to Germany even slumped by 90%. In contrast, imports from Estonia (+76% to 967 mt), the Czech Republic (+55% to 353 mt) and Poland (+52% to 249 mt) experienced a decent percentage increase.

Since the beginning of this calendar year, there have been noticeable shifts compared to last year. For example, shipments from Russia fell by 30% to 3,836 mt in the first three months of 2021, and the situation is similar for Canada (-75% to 1,416 mt) and Ukraine (-47% to 1,972 mt). Imports from Estonia, however, increased by 262% to 474 mt.

EU mustard seed* imports from third countries, in mt

| Country | 2019 | 2020 | Diff. |
|--------------|----------------|----------------|--------------|
| Russia | 32,064 | 52,929 | 65.1% |
| Canada | 37,250 | 29,692 | -20.3% |
| Ukraine | 19,763 | 17,289 | -12.5% |
| Uruguay | 14,894 | 11,634 | -21.9% |
| Kazakhstan | 10,122 | 3,097 | -69.4% |
| Moldova | 1,922 | 2,210 | 15.0% |
| USA | 2,385 | 208 | -91.3% |
| Others | 523 | 719 | 37.5% |
| Total | 118,923 | 117,778 | -1.0% |

*European Commission; *12075090 Mustard seeds, whether or not broken (excl. for sowing)*

Price indications for Eastern Europe

In the European spot market, prices for yellow mustard seeds with a 99.5% purity from Russia are at a level of EUR 940/kg FOB Netherlands. Offers for Ukrainian goods are at EUR 980/kg for brown mustard seeds and EUR 870/kg FOB Netherlands for the "oriental" variety.

Mustard seeds

| Quality, origin | EUR/mt |
|--------------------------|--------|
| Yellow, 99.5%, Russia | 940 |
| Brown, 99.5%, Ukraine | 980 |
| Oriental, 99.5%, Ukraine | 870 |
| <i>FOB Netherlands</i> | |

Hazelnuts, Turkey

Market taken aback by recovery of Turkish lira

ORDU. After weeks in which the Turkish lira remained weak, the market has now witnessed a rather unexpected turn. Signs of economic recovery have given the local currency a lift. Bookings in the tourism industry are, for instance, much better than expected. Not all players in the hazelnut market are, however, happy about this. Many even fear that they may incur heavy losses.

Lira gains some strength again

Holiday bookings are up in Turkey and have driven up the lira, which has gained in value to the US dollar and the euro. President Recep Tayyip Erdoğan is, in addition, expected to meet US president Joe Biden and discuss tensions at this week's NATO summit. Issue is that Turkey is central to China's Belt and Road Initiative. The talk may certainly have an impact on the lira.

Strong domestic demand supports raw material prices

High domestic demand coupled with exporters engaging in speculative buying have driven up raw material prices. Demand is, however, rather subdued in Europe at present. The recent rise in value of the Turkish lira is giving rise to concerns. Issue is that many have sold supplies in advance at low rates and may incur heavy losses, especially if the lira proves to be stronger than expected.

Traders, therefore, reckon that the prices for hazelnut preparations may drift apart from prices for hazelnut kernels in the fourth quarter and the market may again be confronted with wide price gaps. Export prices are up. While some enquiries are still being issued, buyers are expected to prefer to wait before purchasing large volumes.

Hazelnuts, Turkey

| Size | EUR/kg |
|---------------------------|--------|
| Natural, 11-13 mm | 5.30 |
| Diced, 2-4 mm | 5.70 |
| Meal, 0-2 mm | 5.50 |
| Paste | 5.15 |
| <i>DDP Central Europe</i> | |

Almonds, Spain & USA

US exports set new record

MADRID/SACRAMENTO. Last week, the Spanish Almond and Hazelnut Exporters Association (SAB-Almendrave) held its sixth annual meeting. The focus was on the prospects for the 2021 almond crop in the main growing countries.

What the growing countries can expect

In Spain, a large part of the newly commissioned almond plantations are equipped with artificial irrigation. This increases the yield potential and thus also the annual crop result. By 2024, Spain should be able to reach a production potential of 180,000 mt. In the current year, however, frost damage and fungal infestation are reducing the crop, so that the forecast is just under 110,000 mt, about 6% behind last year's result.

Meanwhile, the drought in California will not leave this year's almond crop unaffected, as Richard Waycott, Chairman and CEO of the Almond Board of California, once again confirmed. All the more surprising, therefore, are the current forecasts of the National Agricultural Statistics Service (NASS), which predict a new record crop of 1.45 million mt.

According to the CEO of the Almond Board of Australia, Ross Skinner, they expect a crop of 123,000 mt. The goals for the future are similar to those of the Spanish farmers. In Australia, too, the production potential is expected to grow to 180,000 mt by 2025.

Global almond production in 2021/2022 is currently estimated at 1.774 million mt of shelled almonds, of which almost 95% will come from three growing countries - California remains the unbeaten leader with 1.45 million mt.

Exports set new record

As the backlog caused by container shortages and similar logistical hurdles could be further cleared in May, the monthly exports for 2021 are significantly higher than in the same month last year. According to Blue Diamond Almonds' experts, the June figures should show a similar trend. Nearly 100,000 mt of US shelled and unshelled almonds were shipped domestically and internationally in May 2021, about 43% more than in May 2020. Not only did domestic demand increase by 22% to 31,704 mt, but also export volumes were up 55% year-on-year to 67,917 mt. Particularly noteworthy are

the shipments to countries such as Spain (+80% to 8,534 mt) and Italy (+74% to 4,423 mt) as well as China/Hong Kong (+205% to 4,052 mt) and the United Arab Emirates (+259% to 4,517 mt).

A total of 1,110,504 mt of shelled and unshelled almonds have been shipped domestically and internationally since the start of the season, surpassing last year's record total. While domestic demand experienced a moderate increase of 4% to 304,787 mt, export volumes climbed by 30% to 805,717 mt. By the end of July, deliveries are expected to increase to a total of 1.27 million mt.



Possible price increase for the new crop

Blue Diamond Almonds reckons that US end-of-season stocks could be 275,000-315,000 mt. Therefore, in the event of a new record crop, a total of 1.72-1.76 million mt of almonds could be available next season, almost 200,000 mt more than this season, despite the continued good US export figures. In the European spot market, there are sufficient goods available and in recent weeks the prices for Spanish and Californian almonds have been corrected downwards again. For the new crop, however, market players expect a higher level at the beginning of the season. In particular, demand for Nonpareil almonds noticeably exceeds supply, which should also be reflected in prices.

Almonds

| Type | EUR/kg |
|-------------------------------------|-----------|
| Valencia, 12/14 mm, natural, Spain | 3.50-3.65 |
| Valencia, 12/14 mm, blanched, Spain | 4.40-4.45 |
| Largueta, 13/14 mm, natural, Spain | 5.15 |
| Marcona, 12/14 mm, natural, Spain | 7.20 |
| California, SSR, 23/25, natural | 4.10 |
| California, SSR, 23/25, blanched | 4.75 |
| <i>FCA Spain</i> | |

Dried apricots, Turkey

Curious shift in prices

MALATYA. As raw dried apricot supplies are nearly sold out prices have taken a rather curious turn in the export market. Turkey is still to issue official production estimates and speculations are rife as to when this will happen. Harvesting has, meanwhile, started.

Official estimates still to be issued

Traders in Turkey report that the market is still very much subdued. Exporters are processing existing orders. While harvesting is underway for apricot varieties, which will be sold fresh, this is not yet the case for apricots that will be dried. Speculations are rife as to when official crop estimates will be issued. While some market players reckon that official estimates on crop size and prices will only be issued after the Eid festival towards the end of July, others are convinced that this will happen earlier. The current supply squeeze for raw dried apricots has prompted a rather curious development in the export market as jumbo no 2 and no 4 dried apricots are trading at the same price of USD 4,300/mt FOB Mersin. Prices, however, differ depending on supplier.

Dried apricots, Turkey

| Size | USD/mt |
|------------------------------|--------|
| No 2 | 4,300 |
| No 4 | 4,300 |
| No 6 | 4,150 |
| No 8 | 3,900 |
| <i>FOB Mersin, 2,000 ppm</i> | |

Weekly exports on par with last year

Turkey has shipped 81,170 mt of dried apricots and dried apricot products overseas this season so far, which falls short on the 89,709 mt already shipped in the same period last year. At 1,446 mt weekly exports recently ranged nominally higher than the 1,430 mt exported one year ago. High freight charges coupled with container shortages and exchange rate fluctuations continue to pose a challenge for exporters and market players do not believe that the situation is going to ease anytime soon.

Sultanas, Turkey

Buyers demand lower prices

MANISA. Traders in Turkey report that overseas buyers demand lower sultana prices - without success so far. The TMO's intentions remain unclear with rumours running wild. Total volumes exported this season so far still fall well short on last year.

TMO's intentions remain unclear

Rain has been forecast in Turkey this week and will certainly be welcomed with open arms as farmers are very much concerned over prevailing drought-like conditions. With daytime temperatures ranging at 30C and nighttime temperatures at 16C conditions are excellent for the development of the crop. Traders report that overseas buyers prefer to wait for lower export prices. There is, however, little chance at present that prices will decline. Type 9 sultanas are already trading relatively low at USD 1.60-1.65/kg FOB Izmir for prompt shipments and some advance sales for the new crop have also taken place at this price level. Rumours are running wild at present as to the TMO's intentions of intervening in the market.

Sultanas, Turkey

| Type | USD/kg |
|---------------------------|-----------|
| RTU Grade, type 8, medium | 1.70 |
| Grade A, type 9, STD | 1.60-1.65 |
| Grade A, type 10, STD | 2.10 |
| Organic, Grade A, type 9 | 2.75-2.85 |
| <i>FOB Izmir</i> | |

2020 does not serve as a rule

Weekly exports still range higher than last year. However, it is difficult to draw conclusions from this as the market was hard-hit by the pandemic last year. Turkey shipped 4,125 mt of seedless dried raisins overseas last week, which is up on the 3,697 mt shipped in the same week last year. Total exports range at 179,850 mt this season so far, which is down on the 203,481 mt exported in the same period last year.

Seedless dried raisin exports, Turkey

| Season | mt | avg. USD |
|--------------------------------------|---------|----------|
| 2020/21 | 179,850 | 1,936 |
| 2019/20 | 203,481 | 2,069 |
| <i>Since the start of the season</i> | | |

Dried figs, Turkey

Rain to prevent drought

AYDIN. Rain has finally been forecast in Aydin, which will certainly benefit the fig trees after weeks of extremely dry weather conditions. Farmers now hope that this will prevent a drought, which would be extremely damaging to production.



Nominal rise in prices

Rain has finally been forecast in Aydin this week after the area witnessed weeks of extremely dry conditions, which prompted concerns over a possibly prolonged period of drought. As trading is largely subdued and only few sales are taking place the exporters are able to concentrate on processing existing orders. Although demand as such is good, supplies are limited. Raw material prices range at TRY 23-34/kg depending on variety and supplier. Export prices are nominally up with dried Lerida no 2 figs trading at USD 5,275/mt FOB Izmir.

Dried figs, Turkey

| Type, origin | EUR/kg |
|------------------|--------|
| Lerida, no 1 | 5,575 |
| Lerida, no 2 | 5,275 |
| Lerida, no 3 | 4,975 |
| Lerida, no 4 | 4,530 |
| <i>FOB Izmir</i> | |

Freight charges remain high

Turkey shipped 845 mt of dried figs and dried fig products overseas last week, which is down on the 1,016 mt shipped in the same week last year. Total exports amount to 59,046 mt this season so far, which is down on last year's volume of 60,074 mt. High freight charges are still an issue. Charges currently range at USD 50-75/mt for shipments to European main ports in a 20' FCL.

Dates, Iran

Pest is spreading rapidly

BUSHEHR. With more than 5.5 million palm trees Bushehr Province accounts for around 13% of Iran's date production. Cultivating dates, however, hardly pays for the farmers. Not only are labour costs on the rise but they are also confronted with many challenges as sales are difficult, water tends to be in short supply and pesticides and fertilizers are lacking. To make matters worse, the two-spotted spider mite (*Tetranychidae urticae*) is spreading rapidly in the orchards this year. Farmers are concerned that production will be heavily damaged.

Pest active on 90% of orchards

Different date varieties are cultivated on 34,000 ha in Bushehr Province. Farmer reports that two-spotted spider mites are active in more than 90% of orchards. Problem is that if the pest is not terminated in time it will cause great damage. These mites

dry the sap, causing the skin of the fruit to dry out. If this damage continues the size of the fruits and their nutritional value will be greatly reduced. The spread of this pest largely depends on temperature, relative humidity and hot monsoon winds. Farmers can determine activity by monitoring temperatures and humidity as well as by drawing on experience.

As the Iranian rial has lost in value against other currencies most varieties are trading nominally lower in the export market. Piarom and Zahedi dates are, however, trading EUR 0.03/kg higher than at the start of June. Issue is that market inventories are low.

Dates, Iran

| Type | Grade | EUR/kg |
|----------|---------|--------|
| Mazafati | Premium | 1.30 |
| Piarom | Premium | 4.44 |
| Zahedi | Premium | 1.17 |
| Sayer | Premium | 0.79 |

FOB Iran, order volume 1 mt

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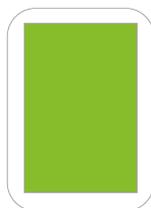
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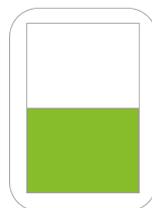
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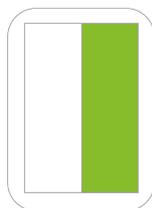
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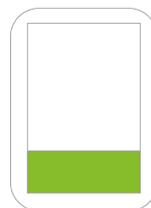
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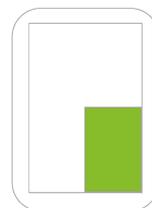
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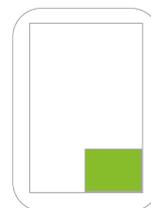
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Please contact

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Buckwheat, Russia & China

Eurasian Economic Union decides on export quotas

MOSCOW/BEIJING. As announced, Russia has stopped the export of buckwheat, buckwheat groats and buckwheat flakes as of 5 June until 31 August 2021. Due to high demand in the international market, the country exported almost 90,000 mt of buckwheat in the first nine months of this season, more than double the average export volume of the past five years. At the same time, however, the crop was about 15% smaller. In order to secure the domestic market, it was therefore decided to pause exports at the beginning of May. Building on this, the Eurasian Economic Union has now set export quotas for buckwheat shipments outside the EAEU for certain countries. With an export quota of zero, shipments from Armenia, Belarus and Kyrgyzstan have thus been temporarily suspended in addition to Russia, while the export quota for shipments from Kazakhstan is 4,200 mt, which is more generous than the originally envisaged 3,500 mt.

Buckwheat, China

| Type | USD/mt |
|-------------------|--------|
| Hulled | 1,240 |
| Roasted | 1,210 |
| Organic, hulled | 1,420 |
| <i>FOB Dalian</i> | |

EU increases imports from Russia

Buckwheat trade within the EU declined markedly last year, from 68,753 mt to 50,665 mt. According to data from the European Commission, this is mainly due to lower shipments from Lithuania and Latvia. At the same time, Poland moved more into the focus of the customer countries. Meanwhile, Russia as a third country is by far the most important buckwheat supplier for the EU. In 2020, 11,725 mt of the total 17,170 mt imported came from Russia, which represented an increase of 134% compared to 2019. China is also one of the most important exporters for the EU, with around 1,650 mt shipped annually. However, due to high freight rates, export prices for Chinese buckwheat to the EMP increased dramatically this year, while prices at origin are at a level of USD 1,240/mt FOB Dalian.

Spices, India

Turmeric sowing is in full swing

GUJARAT. Indian farmers are largely busy sowing for the new crop. In the meantime, the monsoon has arrived in the country.

↘ Cumin

Cumin prices declined this week due to steadily increasing arrivals. Traders report low demand, especially from exporters. The few purchases are being made by local market players. Prices for grade A cumin are currently at USD 1,997/mt FOB India.

↗ Coriander seeds

The situation in the coriander market is currently difficult. On the one hand, farmers in the important growing regions such as Rajasthan, Madhya Pradesh and Maharashtra are busy with sowing, so that less goods are arriving at the markets, and on the other hand, the monsoon is causing extreme weather conditions. Demand is rather weak, as most exporters have already stocked up for the rest of the season. Prices for coriander, Eagle, 5% split are at USD 945/mt FOB India this week.

↘ Turmeric

Turmeric prices are following a downward trend this week; some mandis remain closed due to the Covid situation and export demand also remains rather weak. Arrivals also declined, partly because farmers are currently busy sowing for the new crop. As the weather is unpredictable due to the monsoon, sowing is currently the top priority for farmers. Turmeric, Salem, double polished currently costs USD 1,219/mt FOB India.

↘ Chilli

The key mandi in Guntur has reopened for the time being after a previous pandemic-related closure. Market players report average quality arrivals and stable demand. Overall, prices have declined slightly week-on-week, with only premium grades trading a little higher. Particularly good demand was recorded from Bangladesh last week, with buyers there being mainly interested in the Teja variety. Chilli, S4, stemless currently cost USD 2,080/mt FOB India.

Mundus Agri Direct Purchases On the Way to Smart Contracts



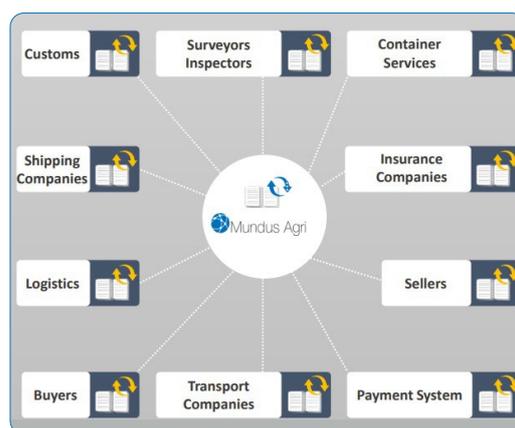
Mundus Agri's new direct purchase option is a big step towards **blockchain technology** and provides the basis for **smart contract trading** in the food commodity market.

Buyers and sellers do business even faster with the new direct purchase option. Offers already provide buyers with an overview on product availability and minimum purchase quantity. Contracting partners communicate and exchange documents via direct messages as soon as an order has been completed.

Smart Contract Applications

In the first stage of development, Mundus Agri provides a **cash and carry application** based on EXW, CFR and FOB prices. Work is already in progress for an extension, which comprises all **freight terms** and **additional costs**, including cargo rates and customs duties.

Mundus Agri promotes digitisation in commodity trading by constructing **interfaces** with which, for instance, the loading of bulk goods can be monitored with a **smart contract** comprising **data** on weight and more.



New Functions

- Select products
- Enter purchase quantity
- Assign delivery or collection location
- Transport cost calculator determines freight charges (optional)
- Select payment method (credit card, invoice, PayPal, Mundus Agri invoicing service)
- Send orders
- Exchange messages and documents with direct messenger



How to sell on Mundus Agri

Only **select customers** will receive access to the new trading function at first. These customers will be validated and have to be rated as reliable by Mundus Agri. The Mundus Agri **company rating system**, which is already in operation, is decisive for selecting customers.

Companies with positive ratings for timeliness of delivery, contract compliance and payment history and complaint handling stand a better chance of being approved for smart contracting on Mundus Agri.

Would you also like to use the direct purchase option? Carsten Megow will be delighted to explain exact procedures. Please do send an email to info@dedere.eu headed "I want more information on the trading platform".

About Us

Mundus Agri is a B2B news and trading platform for agricultural commodities containing up to date market reports, professional marketing tools for your offers and enquiries and reliable price charts along with production and trading statistics. Extensive expertise coupled with the latest technology guarantees your success in trading in the market.

Mundus Agri / Dedere

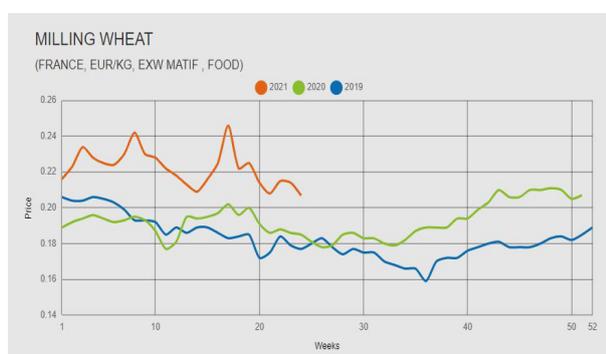
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Wheat, Europe

EU production extected to rise noticeably

FRANKFURT. Exports from the Black Sea Region are expected to rise by 5% to 66 million mt in 2021/2022 as production is set to range higher in Russia, Ukraine and Kazakhstan. A Reuters survey also concludes that carry-over stocks are relatively high in Russia and in Kazakhstan. However, it should also be noted that EU production is expected to rise sharply, which will make it difficult for the Black Sea Region to compete in the international market.



Tallage revises EU production estimates upwards

French-based Tallage has revised EU production estimates upwards by 1.6 million mt to 131.1 million mt, which is a 9.7% rise on the 119.4 million mt produced last year. EU wheat exports should rise by 1.6 million mt to 28.6 million mt. Grain production in Germany is expected to range 2% higher than last year at 44.2 million mt. Winter wheat production should thereby range 4.3% higher at 22.7 million mt, while summer wheat production is expected to decline by 37%. EU soft wheat exports ranged at 24.88 million mt on 13 June, which is down on the 33.94 million mt already exported last year.

EU bread wheat (12/220/76)

| Destination | EUR/mt | Diff.* |
|--------------------------|--------|--------|
| Moselle, DE, DDP | 205 | - |
| Hamburg, DE, DDP | 205 | - |
| Westphalia, DE, DDP | 252 | 0 |
| Upper Rhine, France, FOB | 242 | 0 |

*Trade sources, last updated: 17 June 2021, *EUR/mt*

Corn, Europe

Relief from biofuel blending mandate generate uncertainty

PARIS. Forecasts of rain and cooler temperatures in the US and in the northern Corn Belt over the next ten days are weighing on the market. Supplies should, however, remain limited in the next few months. Especially since the USDA has cut production estimates for Brazil by 3.5 million mt to 98.5 million mt, which is the lowest figure since 2017.

The new US crop over 380 million mt, which is 20 million mt up on last year, will only arrive in autumn. US President Joe Biden's intention of providing relief to oil refiners from biofuel blending mandates has irritated the market.

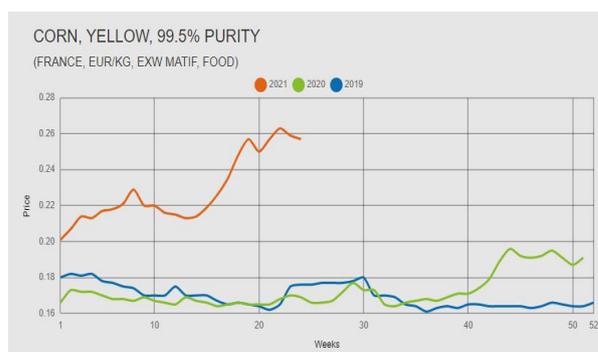
EU grain maize, yellow, 98% purity

| Destination | EUR/mt | Diff.* |
|--------------------------|--------|--------|
| Bordeaux, France, FOB | 255 | -2 |
| South Holland, CIF | 285 | 0 |
| Oldenburg, DE, DDP | 219 | - |
| Upper Rhine, France, FOB | 278 | 0 |

*Trade sources, last updated: 17 June 2021, *EUR/mt*

EU production to range 35% higher

The crop is developing surprisingly well in France. FranceAgriMer estimates that 91% of the plants are in excellent condition, which is 11% above average. At 14.2 million mt production should range 4.1% higher than last year. Production in Poland is, by contrast, set to decline by 1.6% to 4.19 million mt. At 5.34 ha acreage in Ukraine is roughly on par to last year. Rains have given rise to prospects of a bumper crop.



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Commodity prices are extremely volatile. The latest offers are available on www.mundus-agri.eu.

Soy, USA & Brazil

Rain weighs on market

CHICAGO. Forecast of rain and cooler temperatures in the US over the next ten days are weighing on the market. As not all areas will be witnessing much rain yields will, however, differ considerably. SECEX reports that Brazil only exported 5.1 million mt of soy in the first half of June, which is down on the 6.3 million mt exported in the same period last year. Issue is that China is importing less.

Soy meal LP (44/7), Brazil & Argentina*

| FOB | 07/21 | 08/21 |
|---------------|-------|-------|
| Rotterdam, NL | 363 | 361 |
| Hamburg, DE | 355 | 356 |
| Mainz, DE | 369 | 368 |

*Trade sources, last updated: 17 June 2021 *EUR/mt*

Anticipated price decline

The OCBC bank in Singapore reckons that soy futures have peaked and may now start to decline to USD 12/bushel. As stock are limited in Brazil and in the US soy is not expected to trade lower than USD 10/bushel. US soy exports are expected to range at 1.5-2.1 billion bushels in 2021/2022.



The USDA estimate is highly optimistic at 2.08 billion bushels. Crop prices are not expected to reach the same levels as last year in 2021/2022. Soy meal is trading EUR 5-6/mt lower in Rotterdam, Mainz and Hamburg.



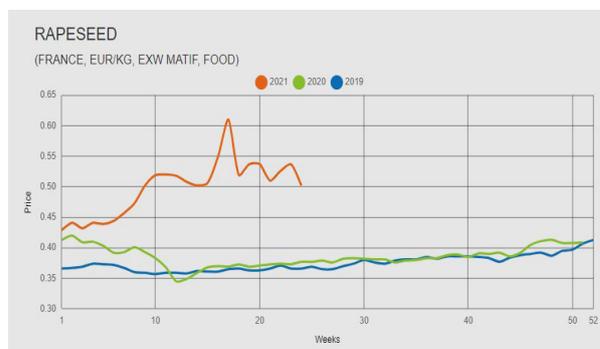
Rapeseed, Europe & Canada

Soy and palm oil add pressure

HAMBURG. Biden's mulling over reliefs for oil refiners from biofuel blending mandates coupled with price adjustments for soy and palm oil are adding pressure to the edible oil market.



Palm oil futures declined by 8% at the start of the week. AmSpec reports that Malaysia's palm oil exports are 14% down on last month in June. While palm oil production is set to continue high, exporters will have difficulties stepping up shipments.



Not enough rain in western Canada

While the crop is profiting from rain in Canada's southern and eastern prairies, the weather remains dry and hot in western Canada. Australia's exports declined by 40% in April to 458,000 mt. March exports still ranged at 749,500 mt. Germany was the most important export destination with shipments ranging at 275,800 mt, which is 61% of Australia's total canola exports for April. A further 121,300 mt were shipped to Belgium and 30,000 mt to Poland. Australia has shipped a total of 2.46 million mt since November.

Rapeseed 00 (40/9/2), Germany

| Destination | EUR/mt | Diff.* |
|---------------------|--------|--------|
| Moselle, FOB | 502 | -38 |
| Hamburg, FOB | 495 | -47 |
| Hamm, delivered | 540 | -44 |
| Mannheim, delivered | 520 | -64 |

*Trade sources, last updated: 17 June 2021 *EUR/mt*

| Product | EUR/mt | Diff. |
|---|--------|---------|
| Almond meal, blanched, 0 - 2 mm; Food, Nuts; DDP (Germany); USA | 4,450 | 0.00% |
| Almond meal, blanched, 0 - 2 mm; Food, Nuts; EXW (Spain); USA | 4,300 | 0.00% |
| Almonds, blanched, 18/20, Valencia; Food, Nuts; EXW (Spain); Spain | 4,600 | 0.00% |
| Almonds, blanched, 27/30, California SSR; Food, Nuts; EXW (Spain); USA | 4,400 | 0.00% |
| Almonds, blanched, 27/30, Valencia; Food, Nuts; EXW (Spain); Spain | 5,000 | 0.00% |
| Almonds, blanched, diced, 2-4 mm; Food, Nuts; DDP (Germany); USA | 4,500 | 0.00% |
| Almonds, blanched, diced, 2-4 mm; Food, Nuts; EXW (Spain); USA | 4,350 | 0.00% |
| Almonds, blanched, sliced, 0.7 - 0.9 mm; Food, Nuts; EXW (Spain); USA | 4,550 | 0.00% |
| Almonds, blanched, sliced, 0.9 - 1.1 mm; Food, Nuts; DDP (Germany); USA | 4,700 | 0.00% |
| Almonds, blanched, slivered; Food, Nuts; EXW (Spain); USA | 4,450 | 0.00% |
| Almonds, natural, 18/20, Valencia; Food, Nuts; EXW (Spain); Spain | 3,650 | 0.00% |
| Almonds, natural, 27/30, Langueta; Food, Nuts; EXW (Spain); Spain | 3,500 | 0.00% |
| Almonds, natural, 27/30, Valencia; Food, Nuts; EXW (Spain); Spain | 5,150 | 0.00% |
| Apricots, dried, diced, 5 x 8 mm; Food, Fruits, Dried; FOB (Mersin); Turkey | 2,394 | +0.42% |
| Apricots, dried, sulphured, No. 2; Food, Fruits, Dried; FOB (Mersin); Turkey | 3,550 | +0.40% |
| Apricots, dried, sulphured, No. 4; Food, Fruits, Dried; FOB (Mersin); Turkey | 3,550 | +0.40% |
| Arabica coffee, Category A, sieve 18; Food, Coffee; EXW (CBOT); USA | 2,762 | -3.90% |
| Blue poppy seeds, Morphine < 25 ppm, 99.9% purity; Food, Oil Seeds; CFR (Hamburg); Turkey | 2,169 | +0.56% |
| Blue poppy seeds, Morphine < 25 ppm, 99.9% purity; Food, Oil Seeds; DDU (Germany); Czech Republic | 1,940 | -0.51% |
| Buckwheat, hulled, 99.95% purity; Organic Food, Grain; CFR (Hamburg); China | 1,454 | +0.28% |
| Butter, lightly acidulated; Food, Milk Products; EXW (Germany); Germany | 3,965 | -1.73% |
| Butter, lightly acidulated; Food, Milk Products; EXW (Polen); Poland | 3,850 | -3.51% |
| Cocoa beans; Food, Cocoa / Chocolate; EXW (CBOT); USA | 1,995 | +1.94% |
| Coconut oil; Food, Oils; FOB (Indonesia); Indonesia | 1,270 | 0.00% |
| Coriander seeds; Food, Spices / Herbs; EXW (India); India | 792 | +2.59% |
| Corn, long positions; Food, Grain; EXW (CBOT); USA | 181 | -12.14% |
| Corn, short positions; Food, Grain; EXW (CBOT); USA | 209 | -7.52% |
| Corn, yellow, 99.5% purity; Food, Grain; EXW (MATIF); France | 246 | -6.11% |
| Desiccated coconuts, fine, Food, Fruits, Dried, FOB (Indonesia) | 1,843 | +1.99% |
| Desiccated coconuts; Food, Fruits, Dried; FOB (Indonesia); Indonesia | 2,052 | +1.99% |
| Desiccated coconuts; Food, Fruits, Dried; FOB (Philippines); Philippines | 2,015 | +1.97% |
| Desiccated coconuts; Food, Fruits, Dried; FOB (Sri Lanka); Sri Lanka | 2,390 | +3.73% |
| Figs, dried, no. 2, Lerida; Food, Fruits, Dried; FOB (Izmir); Turkey | 4,355 | +0.88% |
| Figs, dried, no. 4, Lerida; Food, Fruits, Dried; FOB (Izmir); Turkey | 3,740 | -4.25% |
| Flaxseed, brown, 99.9% purity; Organic Food, Oil Seeds; CFR (Hamburg); China | 1,541 | +1.38% |
| Flaxseed, brown, 99.9% purity; Food, Oil Seeds; DDP (Germany); Eastern Europe | 810 | -1.22% |
| Ginger, dried, NUGC quality, Food, Spices / Herbs, FOB (India) | 2,138 | +4.09% |
| Granulated sugar, EEC cat. II, medium; Food, Sugar / Sugar Products; DDP (Germany); EU | 515 | +0.98% |

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| Product | EUR/mt | Diff. |
|---|--------|---------|
| Hazelnut kernels, blanched, diced; Food, Nuts; DDP (Germany); Turkey | 5,700 | +1.79% |
| Hazelnut kernels, natural, 11/13 mm; Food, Nuts; DDP (Germany); Turkey | 5,300 | +4.95% |
| Hazelnut meal, natural; Food, Nuts; DDP (Germany); Turkey | 5,500 | +1.85% |
| Hazelnut paste, medium; Food, Nuts; DDP (Germany); Turkey | 5,150 | +3.00% |
| Millet, hulled, 99.9% purity; Organic Food, Grain; CFR (Hamburg); China | 1,525 | +1.46% |
| Milling wheat; Food, Grain; EXW (MATIF); France | 204 | -3.77% |
| Milling wheat, short positions; Food, Grain; EXW (CBOT); USA | 197 | -4.37% |
| Oat, long positions; Food, Grain; EXW (CBOT); USA | 210 | -3.67% |
| Oat, short positions; Food, Grain; EXW (CBOT); USA | 211 | -3.65% |
| Peppercorns, black, 500 g/l, Food, Spices / Herbs, FOB (India) | 4,277 | +5.40% |
| Pumpkin seeds, GWS, Grade A, 99.95% purity; Food, Oil Seeds; CFR (Hamburg); China | 3,067 | -1.70% |
| Pumpkin seeds, GWS, Grade A, 99.95% purity; Organic Food, Oil Seeds; CFR (Hamburg); China | 3,686 | +1.99% |
| Pumpkin seeds, GWS, Grade AA, 99.95% purity; Food, Oil Seeds; CFR (Hamburg); China | 3,249 | -1.13% |
| Pumpkin seeds, hulled, shine skin, Grade A, 99.95 % purity; Food, Oil Seeds; CFR (Hamburg); China | 3,067 | -1.95% |
| Pumpkin seeds, hulled, shine skin, Grade AA, 99.95% purity; Food, Oil Seeds; CFR (Hamburg); China | 3,191 | +0.92% |
| Pumpkin seeds, hulled, snow white, Grade A, 99.95% purity; Food, Oil Seeds; CFR (Hamburg); China | 2,681 | +1.98% |
| Raisins, sultanas, grade A, type 10, standard; Food, Fruits, Dried; CFR (Hamburg); Turkey | 1,750 | +0.06% |
| Raisins, sultanas, grade A, type 9, jumbo; Food, Fruits, Dried; CFR (Hamburg); China | 1,424 | +2.01% |
| Raisins, sultanas, grade A, type 9, standard; Food, Fruits, Dried; CFR (Hamburg); Turkey | 1,340 | +0.07% |
| Raisins, sultanas, grade A, type 9, standard; Food, Fruits, Dried; CFR (Hamburg); China | 1,382 | +1.99% |
| Raisins, sultanas, grade A, type 9, standard; Organic Food, Fruits, Dried; FOB (Izmir); Turkey | 2,304 | +1.90% |
| Raisins, sultanas, RTU-grade, type 9, jumbo; Food, Fruits, Dried; CFR (Hamburg); China | 1,525 | +2.01% |
| Raisins, sultanas, RTU-grade, type 9, standard; Food, Fruits, Dried; CFR (Hamburg); China | 1,508 | +1.96% |
| Rapeseed; Food, Grain; EXW (MATIF); France | 477 | -10.00% |
| Raw sugar; Food, Sugar / Sugar Products; EXW (CBOT); USA | 306 | -4.38% |
| Sesame seeds, hulled, mechanically dried, 99.95% purity; Food, Oil Seeds; CIF (Hamburg); India | 1,520 | +1.95% |
| Sesame seeds, natural, 99.95% purity; Food, Oil Seeds; CIF (Hamburg); India | 1,407 | +1.96% |
| Soybean meal, long positions; Food, Grain; EXW (CBOT); USA | 1,045 | -18.10% |
| Soybean meal, short positions; Food, Grain; EXW (CBOT); USA | 335 | -3.46% |
| Soybean oil, refined; Food, Oils; EXW (CBOT); USA | 333 | -3.76% |
| Soybeans, dried, long positions; Food, Pulses; EXW (CBOT); USA | 399 | -12.50% |
| Soybeans, dried, short positions; Food, Pulses; EXW (CBOT); USA | 410 | -12.02% |
| Sunflower kernels, hulled, bakery, 99.95% purity; Food, Oil Seeds; CFR (Hamburg); China | 1,476 | -2.32% |
| Sunflower kernels, hulled, bakery, 99.95% purity; Organic Food, Oil Seeds; CFR (Hamburg); China | 1,650 | +0.43% |
| Sunflower kernels, hulled, bakery, 99.95% purity; Food, Oil Seeds; DDP (Germany); Eastern Europe | 1,050 | 0.00% |
| Sunflower kernels, hulled, confection, 99.95% purity; Food, Oil Seeds; CFR (Hamburg); China | 1,501 | -2.78% |
| Sunflower kernels, hulled, confection, 99.95% purity; Organic Food, Oil Seeds; CFR (Hamburg); China | 1,674 | +0.42% |
| Sunflower seeds, unhulled, black; Food, Oil Seeds; CPT (Varna); Bulgaria | 550 | +1.85% |

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These are the prices the suppliers may ask for...

...for purchases in the origins today. All prices are in EUR/kg, based on the current USD exchange rate and are indicated ex warehouse in Europe.

Please consider that prices can change, depending on when the suppliers made their purchases. If purchased today, it takes four to six weeks until the products arrive in Europe.

| Eastern Europe | Price | Blue poppy seeds | Price | Sesame seeds (India) | Price |
|---------------------------|--------|------------------|--------|----------------------------|--------|
| Flaxseed, brown | 0.85 € | Czech Republic | 2.04€ | natural | 1.57 € |
| Sunflower kernels, bakery | 1.09 € | Turkey | 2.43 € | hulled, mechanically dried | 1.69 € |

| Pumpkin kernels (China) | Price | Dried figs (Turkey) | Price | Almonds (Spain) | Price |
|-------------------------------|--------|---------------------|--------|--------------------------|--------|
| grown without shell, grade AA | 3.37 € | Lerida, no 2 | 4.67 € | Valencia, 12/14, natural | 3.72 € |
| shine skin, hulled, grade AA | 3.37 € | Lerida, no 3 | 4.41 € | Valencia >14, natural | 3.87 € |
| snow white, hulled, grade A | 2.92 € | Lerida, no 4 | 4.01 € | Largueta, 12/13, natural | 5.25 € |

| Sultanas | Price | Hazelnuts (Turkey) | Price | Apricots (Turkey) | Price |
|--------------------------------|--------|---------------------|--------|-------------------|--------|
| grade A, standard, China | 1.54 € | diced, 2 - 4 mm | 5.76 € | dried, no. 2 | 3.81 € |
| grade A, jumbo, China | 1.59 € | natural, 11 - 13 mm | 5.35 € | dried, no. 4 | 3.81 € |
| Type 9, grade A, med., Turkey | 1.41 € | meal, 0 - 2 mm | 5.56 € | dried, no. 6 | 3.68 € |
| Type 10, grade A, med., Turkey | 1.84 € | paste | 5.20 € | dried, no. 8 | 3.45 € |

The latest offers are available for members on www.mundus-agri.eu.

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