

April 20, 2022



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The Ukraine conflict and global food price scares
The escalating tensions in the Black Sea region have heaped fresh risks on global food markets already struggling with soaring prices, supply-chain disruptions, and a bumpy recovery from the COVID-19 pandemic. Financial markets reacted immediately, with stock markets sinking and commodity prices soaring.

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Russia-Ukraine conflict produces short-, long-term impacts on grain trade

The biggest impact, the analysts agreed, was on global grain and oilseeds markets. Together, Ukraine and Russia supply nearly 20% of the global corn exports and approximately 30% of global wheat exports. Ukraine alone was the world's largest supplier of sunflower seed oil.

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Institute
for Agricultural
Market Studies

Russian Grain Still Flows to Top Customers Despite War Inflating Costs

Seven weeks after its invasion of Ukraine, Russia is still exporting grain to some of its biggest customers, even as shipping costs soar. The main buyers remain Egypt, Turkey and Iran, said Dmitry Rylko, general director of the Moscow-based Institute for Agricultural Market Studies. The resilience of grain exports, despite sanctions and moves by some traders to shun Russian commodities, is pushing some market observers to raise their estimates for shipments this season.

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artı
Arı Gıda Kimya Tekstil San. ve Tic Ltd Şti.



Special AgriBriefing report: Russia-Ukraine Conflict and Agriculture

On February 24, 2022, Vladimir Putin ordered the Russian invasion of Ukraine, garnering denunciation from countries and leaders around the world—while sending shock waves throughout global markets. President Biden, along with other NATO nations,

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announced “severe and immediate economic costs on Russia,” which included financial sanctions and export controls. The ruble is now worth less than one U.S. cent, while a growing list of companies have shuttered operations in Russia.

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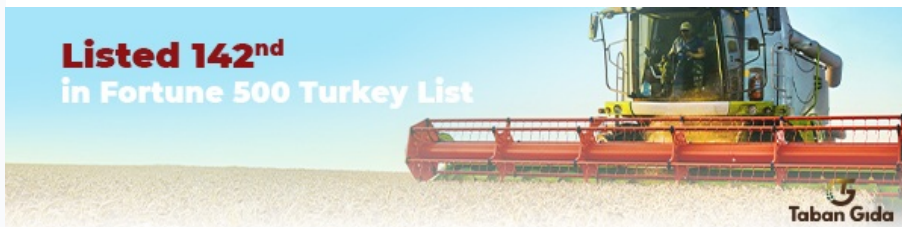
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Russia gradually resuming Black Sea wheat exports - analysts

Russia is gradually resuming wheat exports from its Black Sea ports while navigation in the Azov Sea remains restricted, analysts said on Monday. Exports are ongoing from all the five Black Sea (grain export) terminals,” IKAR agriculture consultancy said in a note.

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Listed 142nd in Fortune 500 Turkey List

Taban Gıda



New Scenarios on Global Food Security based on Russia-Ukraine Conflict

Russia and Ukraine play a substantial role in the global food production and supply. Russia is the world's largest exporter of wheat, and Ukraine is the fifth largest. Together, they provide 19% of the world's barley supply, 14% of wheat, and 4% of maize, making up more than one-third of global cereal exports.

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RUSSIA-UKRAINE CONFLICT

With Russia and Ukraine among the world's largest exporters of grains and oilseeds (and products), the ongoing conflict and resulting spike in agricultural commodity prices has

fuelled concerns about potential food security risks, especially in import-dependent countries in Near East Asia and Africa. Given the fluid situation, the Council's supply and demand projections are especially tentative and are subject to significant uncertainty.

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In February 2022, the situation in Ukraine is causing major turmoils in the Black Sea Market. Wheat is the most significant agricultural product exported from the Black Sea and a critical source for many importers. Therefore, with Ukraine unable to ship its goods by sea and an increasing amount of sanctions imposed on Russia, the Black Sea market is causing disruptions and changing the dynamics of the global Wheat market. What are these disruptions, and what solutions are they to circumvent them

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Які можливі наслідки воєнного стану для портів?

Світлана Дмитришина фрахтовий брокер компанії Easytrading LLC

Наразі українські порти, Маріуполь та Бердянськ у тому числі, працюють у штатному режимі. Ніяких додаткових обмежень щодо воєнного стану в портах не введено. Та які сценарії можливі?

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В ЕАЭС хода нет: как ограничения повлияют на экспорт кубанского зерна

Правительство запретило экспорт пшеницы в страны ЕАЭС до 30 июня 2022 года. На них в структуре поставок



Surging Wheat Prices and Fertilizer Shortages: How the War in Ukraine Could Impact U.S. Agriculture

Fertilizer prices have skyrocketed in the past year and reached record levels in recent days. Since January 2021, many

Краснодарского края приходится 4%, однако некоторые финансовые потери сельхозпроизводители все же понесут

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fertilizer types have tripled or quadrupled in price. This has been attributed to weather, supply chain disruptions and technical difficulties at plants.

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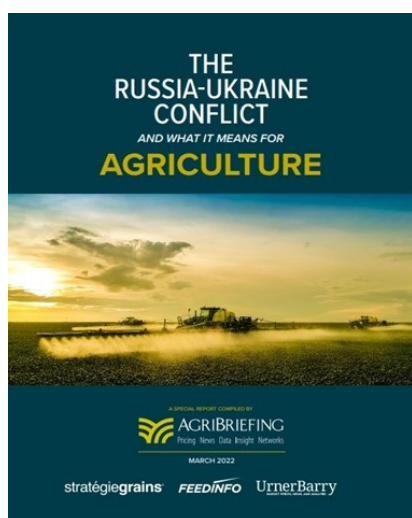


StoneX

StoneX Bull Bear Report

Wheat market continues to be stuck with plenty headline noise, the world hopes for peace to be found, but in reality Putin and Zelensky remain far apart right now- will honestly be hard to find an agreement. But the global markets right now continue to assume minimal export flows from Black Sea Russian ports and Ukraine still closed. The growing question is how much flow will come via new crop? Ukraine is still up for debate, but as long as Putin is in power, sanctions will remain and find it tough to see the normal flows regardless of when this war is done.

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Grain: World Markets and Trade: Stability in Rice Market Contrasts with Volatility in Wheat and Corn

Over the past few weeks, global grain markets have been significantly affected by the Russian invasion of Ukraine and the near-complete cessation of Ukraine grain exports. Because Ukraine is a major wheat and corn exporter, the result has been a sudden shift of demand to other suppliers and a remarkable increase in exporter price quotes for those grains.

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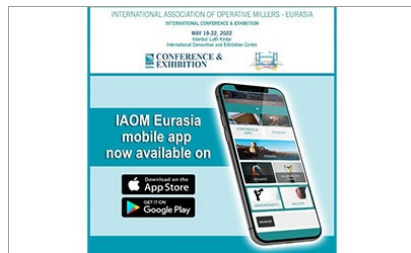




EUROPEAN FLOUR MILLERS CONGRESS

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World Agricultural Supply and Demand Estimates

Projected 2021/22 global trade is lowered 3.0 million tons to 200.1 million as lower exports by the EU, Ukraine, the United States, and Kazakhstan are not completely offset by higher exports by Russia, Brazil, and Argentina. EU exports are reduced 3.5 million tons to 34.0 million on a lower-than-expected pace. Russia's exports are raised 1.0 million tons to 33.0 million as it continues to export at competitive prices.

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Todd's Take
Russia-Ukraine War Adds to Market Volatility, Complicates New-Crop Sales in 2022

I am not trying to unduly scare anyone, but I also believe it is reasonable to prepare for the possibility Russia's president may turn up the heat if things don't go his way. As we have already seen a little taste of, it doesn't take a lot to scare markets. If you are going to hold new-crop hedges, you need to ask yourself: Do I have the margin to stay with a corn price that goes to \$9, \$12, or higher? If not, you had better consider buying a call option to go with that futures hedge.

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Egypt left without Russian, Ukrainian grain tries to overcome crisis

Egypt is hoping that a new plan to rely on its own wheat reserves and local production will be enough to cover domestic consumption of the vital grain until 2023. Facing difficulties in importing wheat because of the ongoing Russian operation in Ukraine - the two countries are the largest sources of wheat for Egypt - the government now has to increase dependence on local wheat.

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What's happening in the wheat market?

Ukraine planting outlooks slashed amid Russia invasion

Analyzing Ukraine's agricultural landscape against the backdrop of the country's conflict with Russia Ukraine's new crop and planting campaign will definitely see a major reduction amid the ongoing Russian invasion of the country

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Key information on Black Sea grain and oilseed markets in our Telegram

APK-Inform continues to monitor closely the impact of these and many other factors on



Cereal exports: Ukraine default hits

the grain, oilseed and related markets. We start to share the most relevant and important information in our Telegram channel: https://t.me/apk_inform. Join and stay informed about the development of the Black Sea grain and oilseed markets!

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African countries hard

The war in Ukraine could significantly worsen the supply of cereals used in food production in African countries, making food more expensive if Ukraine ceases to be a grain supplier.

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The 2022 Conference will be held in a hybrid format on 7 & 8 June 2022 in central London.

Take advantage of a special, reduced rate and secure your place at the 31st IGC Grains Conference in London, on 7 - 8 June, 2022. The forum has long been established as the industry's flagship conference, bringing together trade professionals, policymakers and business leaders from across the entire supply chain. Offering a truly global perspective, top-tier speakers will share insight and knowledge in a series of panel discussions relating to climate change policy and the grains sector.

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Weekly Price Report April 14, 2022

World food prices were up nearly 13% in March according to the Food and Agriculture Organization's (FAO) food price index. The food price index averaged 159.3 points compared to the February record of 141.4. The cereal price index was up 17%. FAO also reduced its worldwide wheat production projection from 790 MMT to 784 MMT after factoring in a possible 20% loss to Ukraine's winter wheat production.

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Hundreds of millions of people may be left without access to food. How Russian-Ukrainian war will affect the world

At the moment, grain exports from Ukraine have been stopped, which means the world will face a lack of 6 mln tonnes of Ukrainian wheat and 15 mln tonnes of corn if the war

Kazakhstan :Grain and Feed Update

While the government announced agricultural credit and subsidy policies to increase production, grain producer contacts were pessimistic about the upcoming planting season, given last year's dry conditions and this winter's reduced snow cover in several grain producing

will continue. Exports from Russia are also suspended, thus Russia will not supply about 8 mln tonnes of grains. Future disruptions to mass production and exports are inevitable.

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regions. The government announced new measures to protect domestic food security, boost producer incomes, and control domestic food inflation.

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Зерно дорожает в портах

На фоне панических настроений на мировом рынке зерна после начала специальной военной операции на Украине закупочные цены на российскую пшеницу в глубоководных портах обновляют рекорды. У некоторых крупнейших экспортеров показатель достиг 18,3-18,6 тыс. руб. за тонну из-за девальвации рубля и резкого удорожания пшеницы на мировом рынке, где цены превысили \$400 за тонну. Растущие цены могут привести к новым экспортным ограничениям, опасаются участники рынка.

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Russian export curbs supporting prices: Grain market Daily

Special export licences within the current quotas would continue to be provided. This may be significant for major Russian wheat importers, for example Egypt and Turkey, as shipments could continue to these countries. For wheat, this quota is currently set at 8.0Mt (15 Feb to 30 Jun). IKAR consultancy understand 6.0-6.5Mt remains to be exported before the end of June.

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International Association of Operative Millers – Eurasia
İçerenköy Mh. Umut Sk. AND Plaza No: 10-12 Kat:18
Kozyatağı, Ataşehir - İSTANBUL / TURKEY
P: +90 216 594 58 26 • F: +90 216 594 57 99
info@iaom-eurasia.info | www.iaom-eurasia.info

По вопросам размещения объявлений обращайтесь
Мобильный и Whatsapp: +90 (533) 281 43 12
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