

July 19, 2022



**BAŞLIKLAR**

Akar: Ukrayna'dan tahıl sevkiyatına ilişkin İstanbul'da koordinasyon merkezi oluşturulacak

ABD'nin bütçe açığı Haziran'da yıllık %49 azalarak 89 milyar dolar oldu

Japonya'da Mayıs'ta kapasite kullanım oranı aylık %9,2 düştü

Japonya'da Mayıs'ta sanayi üretimi (final) aylık %7,5 düştü, önceki %7,2

PIYASA HATTI

Bloomberg	%0,73	TUREX	11,40	%1,24	TURGG	199,20	%0,55	TURSD
14 Tem 14:26	BIST100	EUR/TL	TLREF	BITCOIN	USD/HKD	NAS FUT		
@BloombergHT	2.410,73 %0,11	17,4929 %0,43	%14,91 0,65	19.693,29 %0,18	7,8499 %0,00	11.650,25 %0,95		



**Ukraine Wheat: Conflict Causes Lower Harvested Area**

Ukraine wheat production for marketing year (MY) 2022/23 is estimated at 19.5 million metric tons, down 9 percent from last month, and down 41 percent from last year. USDA crop production estimates for Ukraine include estimated output from Crimea. Yield is estimated at 3.71 tons per hectare, down 1 percent from last month and 17 percent from last year. Harvested area is estimated at 5.3 million hectares (mha), down 10 percent from last month and 29 percent from last year.

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**OVERVIEW FOR 2022/23**

Global production is down this month primarily on smaller crops in the European Union, Ukraine, and Argentina and only partially offset by increases for Canada and Russia. Global consumption is lowered this month, mainly on lower feed and residual for the European Union and Ukraine. Ending stocks are revised down mostly on reductions for Ukraine and Pakistan. Imports are raised as higher imports for Algeria, the European Union, Japan, Pakistan, and Vietnam more than offset lower

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## Grain Market Report

Entirely because of larger maize and wheat outturns, 2021/22 total grains production is forecast 3% higher y/y. With the supply gain seen outpacing growth in consumption, end-season stocks are projected to increase by 1%, to 607m t, marking the first accumulation since 2016/17, led by an increase in Ukraine. Linked partly to reduced Black Sea export flows, global trade is forecast to recede to 417m t (-2%).

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### Ukraine production and trade (main grains & oilseeds/products)

The IGC Secretariat has prepared a comprehensive summary of grains (wheat, maize and barley) and oilseeds (sunflowerseed and rapeseed) production and exports (volume and destination) in Ukraine. An overview of sunflowerseed oil and sunflowerseed meal exports is also provided. Based on the latest available customs data and export forecasts issued in GMR 529 (17 February 2022), the remaining volume of shipments in 2021/22 (July/June) are projected at 6.6m t for wheat, 13.6m for maize and 0.4m for barley.

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### Ukraine increased grain export by 4 mln tonnes in 2021/22 MY

According to the State Customs Service of Ukraine, in 2021/22 MY Ukraine exported 48.508 mln tonnes of grains and pulses, the Ministry of Agrarian Policy informed on July 1. Ukraine exported 44.718 mln tonnes of grains and pulses in 2020/21 MY.

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## APK INFORM

### Harvesting of wheat and rapeseed started in Ukraine

Farmers of Odessa, Mykolaiv, Dnipropetrovsk and Zaporizhzhia oblasts have started harvesting early grains and pulses. They have already reaped crops throughout 131.5 thsd ha or 1% of a plan, the Ministry of Agrarian Policy informed on July 1.

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## Alapros

## APK INFORM

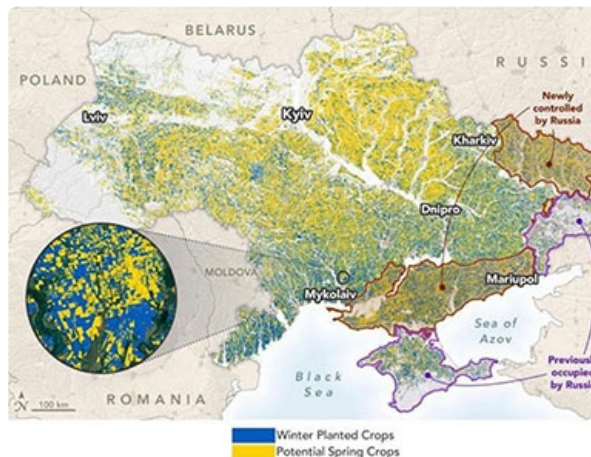
### Greece and Turkey ready to assist in transportation of blocked Ukrainian grain

Turkey is continuing diplomatic efforts to open corridors for the export of grain from Ukraine, and there are already about 20 ships in the region ready to carry out this mission. This was stated by Turkish President Recep Tayyip Erdogan at a press conference following the NATO summit. Greece is willing to provide ships to help export grain from Ukraine's Black Sea ports that have been blocked by Russia, NATO Secretary-General Jens Stoltenberg said on June 30.

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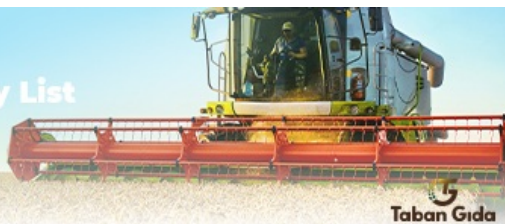


## Russia-Ukraine Conflict: Measuring War's Effect on a Global Breadbasket

NASA Harvest scientists use satellite observations and economic data to track how the Russia-Ukraine conflict is disrupting the global food system.

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### Russia's export wheat crop to rise 25% in 2022/23 -poll

Russia to bring in huge wheat crop, Sanctions, freight costs, strong rouble, export tax hamper trade, This content was produced in Russia where the law restricts coverage of Russian military operations in Ukraine. Russia should have a record 41 million tonnes of wheat available for export in the 2022/23 marketing campaign, up 25% on the current season, depending on the impact of sanctions and other challenges, a Reuters poll showed on Tuesday. Its 2022 wheat crop is expected to increase by 14% to 86.9 million tonnes, according to the median estimate from a survey of nine analysts, officials and traders.

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### Kazakhstan: Kazakhstan Extends Wheat and Wheat Flour Export Restrictions Until September 30

On June 15, Kazakhstan extended wheat and wheat flour export restrictions until September 30. The restrictions were originally approved on April 14 under the Ministry of Agriculture's decree "Regarding export of certain goods from the territory of the Republic of Kazakhstan" and set to expire on June 15, 2022. The recently announced extension also added 550,000 metric tons (MT) of wheat to the original quota of 1.0 million metric tons (MMT), and 370,000 MT of wheat flour to the original quota of 300,000 MT

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### Turkey: Food and Agricultural Import Regulations and Standards Country Report

The main target of Turkish food and agriculture policy is to harmonize the related laws and regulations with the European Union *acquis communautaire*. The Ministry of Agriculture and Forestry is the authority that prepares and enforces the majority of food and agricultural policy and

regulations and is the contact point for international organizations in food and agricultural issues.

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#### Food Inflation in Turkey Marches Higher

Food inflation in Turkey is the highest it has been in decades. Average food prices in May were up 92 percent from a year ago. One of the leading reasons behind higher food prices is the rising cost of on[1]farm inputs, such as fuel, fertilizer, and feed. Other contributing factors include a weakening currency, supply chain challenges, and economic uncertainties. The combined effect of all of this has caused producer prices to shoot up 155 percent in May compared to the same time last year.

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 **U.S. WHEAT ASSOCIATES**

#### U.S. Wheat Associates Price Report

Analysts polled Russia's wheat crop at 86.9 MMT for 2022/23, reported Reuters. The same poll estimated exports at 41.0 MMT in the July-June season. However, the article noted that sanctions following Russia's invasion of Ukraine in February would make exports more difficult.

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Abstract: Global inflation has risen sharply from its lows in mid-2020, on rebounding global demand, supply bottlenecks, and soaring food and energy prices, especially since the Russian Federation's invasion of Ukraine. Markets expect inflation to peak in mid-2022 and then decline, but to remain elevated even after these shocks subside and monetary policies are tightened further.

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