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Report Highlights:

The 2026 spring planting season in Kazakhstan was characterized by effective government coordination and investment, diversified cropping favoring high-margin crops, timely allocation of machinery and inputs, and successful national coverage, culminating in a record total sowing area aligned with the agronomic calendar. However, lower precipitation and hot temperatures in May-June have raised concerns and are expected to result in lower yields.

WHEAT

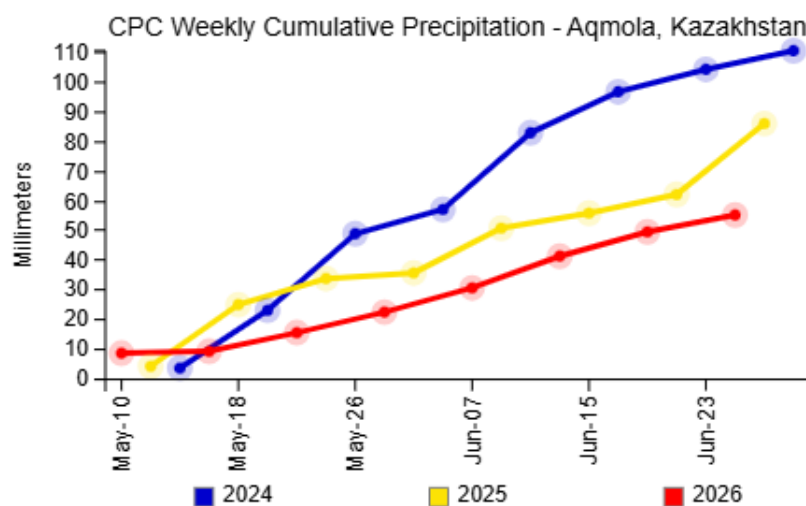
Production

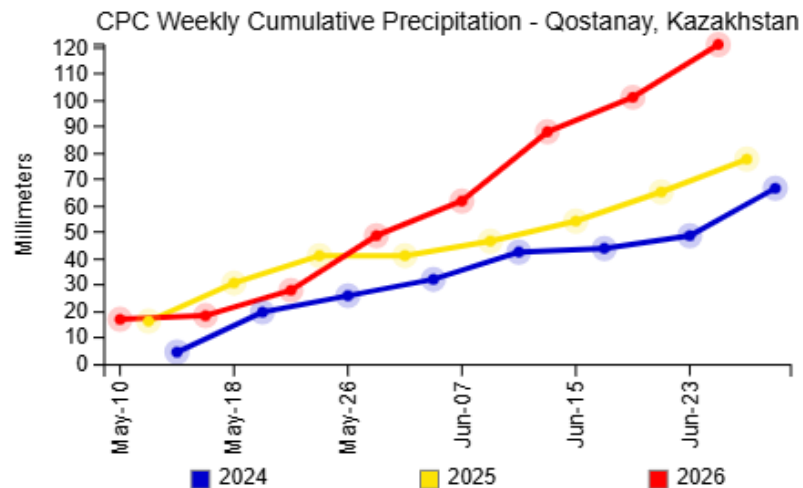
Hot temperatures and reduced precipitation in several regions from May into June have raised concerns and are expected to result in lower yields. As a result, Post estimates wheat production in MY 2026/27 at 15 million metric tons (MMT), nearly 20 percent lower than the previous marketing year. Post estimates MY 2026/27 area harvested at 12.1 million hectares, in line with the Kazakh Ministry of Agriculture's prediction.

Kazakhstan's 2026 spring sowing campaign, which spanned from May through June, progressed under normal weather conditions, allowing most farmers to wrap up planting on schedule. As the main spring wheat regions (like North-Kazakhstan, Akmola and Kostanay) kicked-off planting in mid-April, precipitation was generally near normal, though a minor precipitation deficit began developing in parts of the northern and central regions. Overall, the dry, warm trend favored rapid, uninterrupted tractor operations, allowing farmers to plant millions of hectares without major disruptions. By the end of May, the Ministry of Agriculture (MinAg) reported that sowing was approximately 80 percent complete, with nearly 17 million hectares (ha) sown out of a planned total of 23.8 million ha.

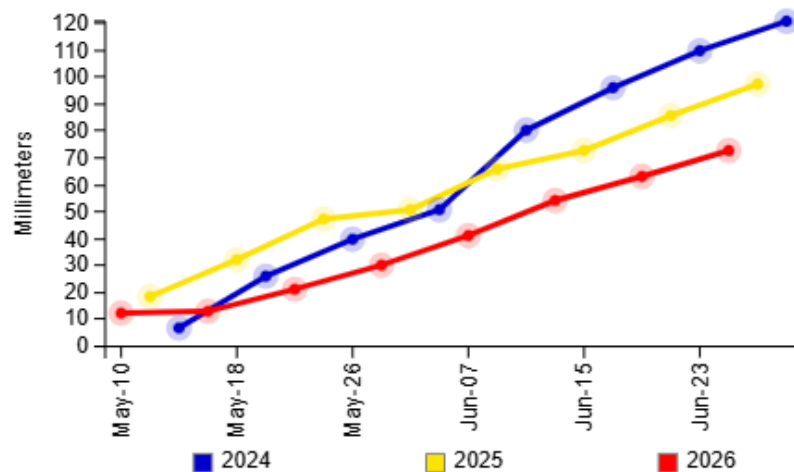
Cumulative precipitation in both Akmola and North Kazakhstan remains well below levels observed in 2024 and 2025. Current rainfall deficits indicate increasing moisture stress during critical early growth stages of spring wheat, raising concerns about yield potential unless timely precipitation arrives in July. In contrast to Akmola and North Kazakhstan, cumulative precipitation in Kostanay is significantly higher so far in 2026 compared to the same period in 2024 and 2025. Abundant early-season rainfall has improved soil moisture conditions and supports favorable development for spring wheat across the region. Please, see Graph 1 for more details.

Graph 1. Weekly Cumulative Precipitations in Akmola, North-Kazakhstan and Kostanay regions, May-June 2026





USDA Foreign Agricultural Service
U.S. DEPARTMENT OF AGRICULTURE



USDA Foreign Agricultural Service
U.S. DEPARTMENT OF AGRICULTURE

Source: [USDA FAS Global Agricultural and Disaster Assessment System](#)

According to local news, planting [finished on June 8, 2026](#). Grain crops covered 14.6 million ha, of which wheat acreage was reduced to 12.1 million ha, a decrease of 125,000 ha compared to the previous year. Oilseeds were sown on 4.2 million ha and fodder crops on 1.2 million ha, while sugar beets occupied 22,000 ha.

In *North Kazakhstan*, the total sown area amounted to 4.3 million ha. As part of efforts to diversify the crop structure, grain acreage was optimized to 2.9 million ha, with wheat accounting for 1.9 million ha. Emphasis was placed on high-margin crops: oilseed acreage reached 1 million ha for the second consecutive year. Feed crops covered 405,000 ha.

In *Akmola* region, the sown area totaled 5.6 million ha. Under government diversification measures, the area dedicated to grains and pulses was reduced by 184,600 ha to 4.5 million ha. This allowed for the expansion of more profitable commodities, like oilseeds whose acreage rose by 220,000 ha to reach 715,000 ha and feed crops which increased by 34,100 ha to 370,700 ha.

In *Kostanay* region, the planned area for spring sowing this season totaled 5.2 million ha. As part of efforts to diversify the crop mix by reducing the share of wheat, the acreage for oilseeds was increased to 887,000 ha, grain legumes to 212,300 ha, potatoes to 7,500 ha, and annual grasses to 107,000 ha. The sowing campaign utilized 514,200 tons of certified seeds (F1–F3, locally produced, imported from Russia and Europe), and 73,300 tons of subsidized diesel fuel was allocated at a price not exceeding 281 tenge (\$0.58) per liter.

Consumption

Kazakhstan’s grain-processing and milling sectors are undergoing steady expansion as new deep-processing investments come online. The government’s \$2.6 billion program to develop starch, syrup, amino acid, and vitamin production by 2028 will add roughly 4.8 MMT of additional wheat and corn processing capacity, signaling a strategic transition from raw grain exports toward higher-value industrial uses. At the same time, dozens of new food and feed processing projects are being implemented, supporting higher utilization across the milling sector. Wheat use for fuel ethanol remains negligible, with no evidence of large-scale ethanol production from cereals. Overall, Kazakhstan’s grain consumption dynamics reflect rising industrial utilization and stable household demand, underpinned by government procurement, intervention purchases, and targeted subsidies that support market stability and encourage the sector’s shift toward value-added processing.

Wheat remains the dominant staple in Kazakhstan, with annual per capita bread consumption of around 60 kg and monthly wheat bread at 2.4 kg per person in 2025. This places Kazakhstan in the middle range globally, with stronger bread consumption than many Western or Asian nations, yet significantly lower than Eastern European and Middle Eastern leaders.

Feed and Residual consumption will account for most of the predicted feed wheat flour (HS 230990) production, consisting of 80 percent of wheat and 20 percent of barley in overall wheat consumption. For MY 2025/2026 Feed and Residual consumption Post estimates at 4.2 MMT, the highest historical record due to doubled feed wheat flour production (HS 230990) and exports of 2.4 MMT in MY 2025/2026 (September-April). Please, see Table 1 below for more details. The decline in feed wheat consumption in MY 2026/2027 to 2.5 MMT is explained with a smaller production estimate.

Table 1. Wheat flour (HS 230990) exports, tons

Subheading	Description	Rank	Unit	Year to Date					
				MY 2022/2023	MY 2023/2024	MY 2024/2025	09/24-04/25	09/25-04/26	%Δ
2309	preparations of a kind used in animal feeding		T	137,563	791,503	2,254,088	1,215,300	2,423,809	99.44
230990	animal feed preparations (mixed feeds, etc.), other than dog or cat food put up for retail sale	1	T	136,729	791,261	2,253,805	1,215,160	2,423,427	99.43

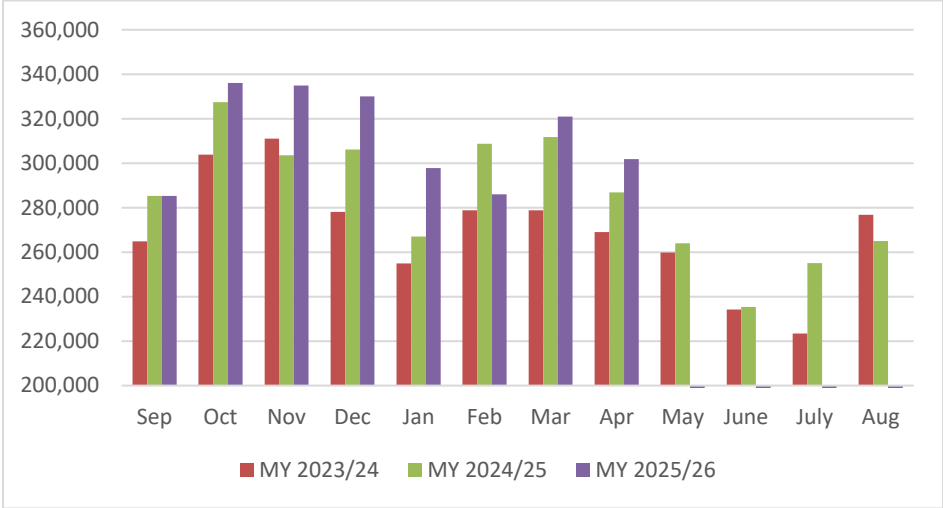
Source: TDM LLC.

Meanwhile, Food, Seed, and Industrial (FSI) Consumption, which accounts for most of the overall wheat consumption, is expected to hold steady year-over-year. FSI consumption for MY 2025/2026 is forecast at 5.1 MMT, in line with the previous year. That includes 2.5 MMT of flour production, or 3.42 MMT in wheat grain equivalent (WGE), other by-products and seeds.

Kostanay region maintains its leadership in grain-to-flour processing with 30 percent market share. Thirty-five milling facilities operate in the region, with a combined annual capacity of up to 2 MMT. Between 2024 and 2025, four investment projects in the grain processing sector, valued at 9.3 billion tenge (\$19.7 million), were commissioned.

Wheat is predominantly used to make flour for bread, pastries, and other flour-based foods. According to Kazakhstan’s Bureau of National Statistics, flour production reached 2.5 MMT during the first eight months of MY 2025/26 (Sep-Apr). As shown in chart 1, wheat flour production in MYs 2024/25 and 2025/2026 was trending higher year-over-year due to the increased availability of bumper crop wheat.

Chart 1. Wheat flour production data



Source: Kazakhstan’s Bureau of National Statistics

Trade

Post has decreased the forecast for MY 2026/27 exports to 9.0 MMT based on import restrictions and decreased production. Exports are forecast down 20 percent compared to the previous year, in line with a 20 percent decrease in production. Please, see Table 4 for more details.

On June 30, 2026, the Government of Kazakhstan imposed a six-month ban on the importation of wheat (HS 1001) into Kazakhstan from third countries, including other Eurasian Economic Union (EAEU) member states, with limited exceptions. Exceptions are included for wheat imported by rail specifically for licensed poultry operations, milling enterprises, licensed grain elevators and the [Food Contract Corporation](#) (a state-owned grain procurement agency). Wheat imported under these exceptions cannot be resold on either domestic or export markets. The ban does not apply to wheat transiting Kazakhstan by rail. It also does not restrict wheat shipments moving between EAEU member states via Kazakhstan.

Local millers and grain traders justified this ban as necessary due to increasing carryover stocks. According to the [Grain Union of Kazakhstan](#), the country is expected to have 2 million tons of wheat in reserve by the start of the 2026 harvest. According to government agencies, significant volumes of feed-grade grain are being imported under the guise of food-grade grain, thereby violating veterinary restrictions, imposed since late March 2026. As a reference, in late March of this year, in response to an animal disease outbreak in Russia ([KZ2026-0005](#)), the Kazakh Ministry of Agriculture temporarily banned imports of livestock and feed grains from Russia. The ministry later clarified that milling wheat (classes 3 and higher) was exempt from the ban.

This restriction on wheat imports is expected to tighten wheat availability for domestic flour millers, raising procurement costs for enterprises not included in the exemption list. The policy may also shift trade dynamics along the Kazakhstan–Russia border, where reduced Kazakh demand is likely to pressure wheat prices downward, making Russian flour more competitive in regional markets. Industry representatives have cautioned that without corresponding measures on flour imports, lower-priced Russian flour could enter Kazakhstan and undercut domestic processors, potentially eroding market share and reducing milling margins. The government’s import exception for licensed mills provides some relief, but the broader flour sector may face increased price volatility and competitive pressure over the coming months.

Tax reform effective from January 1, 2026, resulted in a VAT reimbursement of only one fifth, which reduced margins of wheat exporters. After multiple discussions, on June 19, 2026, the government officially scrapped a plan to cap VAT refunds for agricultural exporters. Full VAT reimbursement was reinstated for all agricultural exports, including wheat. Official removal of the 80 percent cap eliminates uncertainty surrounding tax treatment, offering exporters a stable, predictable operating environment.

Since the beginning of the marketing year Kazakhstan has imported around 1 MMT of wheat from Russia, mainly of feed quality to produce feed flour. As the ruble continues to weaken against the tenge, wheat imports from the Russian Federation will become more price competitive. Please, see Table 2 for more details.

Table 2. Wheat imports, WGE

Partner Country	Rank	Unit				Year to Date		
			MY 2022/2023	MY 2023/2024	MY 2024/2025	09/24- 04/25	09/25- 04/26	%Δ
_World		WGE	2,217,861	2,397,454	477,629	245,915	1,069,474	334.9
Russia	1	WGE	2,204,864	2,378,867	457,396	230,435	1,058,253	359.24
China	2	WGE	4,833	9,032	10,580	8,330	5,771	-30.72
South Korea	3	WGE	2,314	2,174	3,413	2,618	1,745	-33.35
Italy	4	WGE	1,877	1,568	1,730	1,164	1,057	-9.19
Kyrgyzstan	5	WGE	2,550	1,440	1,711	1,290	994	-22.95
Uzbekistan	6	WGE	47	2,302	795	744	208	-72.04

Source: TDM LLC.

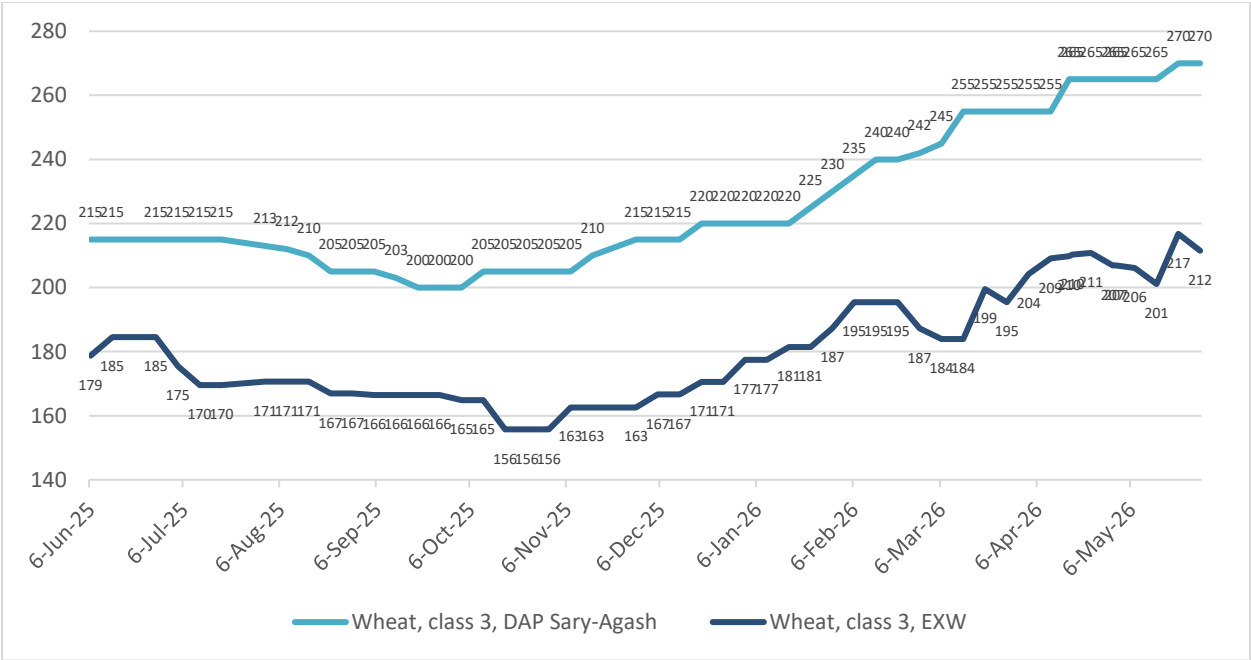
From April to May 2026 wheat prices continued their upward trend, though with some volatility. Under EXW ([Incoterms 2020 Ex Works](#)), the seller makes the grain available at their elevator, and the buyer assumes all costs and risks from loading to final delivery, including transport and export procedures. Food grade wheat price on EXW conditions increased from roughly \$195–\$199/MT in early April to a peak of \$217/MT in mid-May, before easing slightly toward \$212/MT by the end of the month.

Under DAP ([Incoterms 2020 Delivered at Place](#)), the seller is responsible for delivering the wheat to the agreed destination at the border, covering all transport and export costs. The buyer is responsible only for import duties and unloading. Prices of wheat delivered to the border rail station with Uzbekistan showed a more stable rise, climbing from around \$255–\$260/MT in early April to \$270/MT by late May. Overall, the period was marked by strong price growth for DAP SaryAgash wheat and moderate but positive gains for EXW wheat. Please, see Chart 2 for more details. SaryAgash border rail station is in the Turkistan region, near the border with Uzbekistan, and it serves as a key freight and passenger hub in the region.

According to grain traders, purchasing activity remained subdued in April-May due to a seasonal slowdown in export shipments. Most traders and processors have either completely halted purchases or are operating with smaller volumes to meet existing obligations. Additional downward pressure on prices

stems from the harvest campaign in Uzbekistan, where the market is receiving domestic grain from the new crop.

Chart 2. Wheat prices, USD/MT



Source: [Apk-Inform](#) Note: DAP is the price delivered at port or border crossing. EXW is inland elevator price.

Stocks

With an expected contraction in wheat production and smaller import volumes, MY 2026/27 ending wheat stocks are expected to shrink year-to-year by more than 30 percent to about 2 MMT.

MY 2025/26 wheat inventories are lowered to about 2.9 MMT due to a downward revision in production and strong demand for wheat for feed flour exports to China. Inventories in the last couple years have ballooned because of near-record production volumes. The government-run FCC reportedly holds approximately 200,000 MT of feed wheat and 500,000 MT in milling wheat as part of the country’s strategic grain reserve. The private sector holds the rest.

The best indicator of available grain stocks held by the private sector comes from licensed warehouse reports. However, this data is not aggregated, making it difficult to assess stock levels by grain type. As of June 12, 2026, licensed grain warehouses were storing about 3.1 MMT of grain with 9 MMT of available storage. Post assesses that warehoused grain in the three biggest wheat producing regions – *Akmola, Kostanay and Northern Kazakhstan* – is mostly wheat and to a lesser extent barley.

Table 3. Licensed Grain Storage by Regions (MT)

	12/12/2025	8/2/2026	13/02/2026	13/03/2026	13/04/2026	13/05/2025	12/6/2025
Akmola	2,604,538	2,286,901	2,273,055	2,121,269	1,910,362	1,587,767	1,291,062
Aktobe	98,397	82,376	83,376	77,600	74,240	75,192	76,962
Almaty	3,449	3,621	3,621	3,084	2,897	2,897	2,897
West-Kazakhstan	63,880	53,951	56,776	49,467	47,647	46,786	40,594
Karaganda	67,105	59,817	60,770	55,885	49,634	48,502	44,181
Kostanay	1,518,646	1,280,617	1,261,230	1,158,195	1,022,667	892,092	752,566
Pavlodar	102,215	86,326	86,503	80,427	73,190	66,811	57,915
North-Kazakhstan	1,599,664	1,372,755	1,350,033	1,270,556	1,115,962	981,333	795,298
East-Kazakhstan	95,645	84,306	76,594	66,484	57,141	45,833	36,014
Astana	39,587	29,702	27,611	31,290	31,310	47,472	34,649
TOTAL	6,193,126	5,340,372	5,279,569	4,914,257	4,385,050	3,794,685	3,132,138

Source: [Grain Receipts Digital Platform Qoldau](#)

Table 4. Wheat Production, Supply and Distribution

Wheat Market Year Begins Kazakhstan	2024/2025		2025/2026		2026/2027	
	Sep 2024		Sep 2025		Sep 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	13067	12500	12195	11457	12000	12100
Beginning Stocks (1000 MT)	3445	3445	3328	3328	2979	2904
Production (1000 MT)	18577	18577	19326	19326	15000	15000
MY Imports (1000 MT)	500	500	975	1100	700	700
TY Imports (1000 MT)	600	600	975	1100	700	700
Total Supply (1000 MT)	22522	22522	23629	23754	18679	18604
MY Exports (1000 MT)	10194	10194	11500	11500	9000	9000
TY Exports (1000 MT)	9986	9986	12000	12000	9000	9000
Feed and Residual (1000 MT)	3900	3900	4000	4200	2500	2500
FSI Consumption (1000 MT)	5100	5100	5150	5150	5175	5175
Total Consumption (1000 MT)	9000	9000	9150	9350	7675	7675
Ending Stocks (1000 MT)	3328	3328	2979	2904	2004	1929
Total Distribution (1000 MT)	22522	22522	23629	23754	18679	18604
Yield (MT/HA)	1.4217	1.4862	1.5847	1.6868	1.25	1.2397
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Wheat begins in July for all countries. TY 2026/2027 = July 2026 - June 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

BARLEY

Production

Hot temperatures and reduced precipitation in several regions in May-June have raised concerns and are expected to result in lower yields. As a result, Post estimates barley production in MY 2026/27 at 3.2 MMT, nearly 10 percent lower than the previous marketing year.

Heading into the 2026 spring sowing campaign, the Ministry of Agriculture actively pushed its crop diversification strategy, encouraging a shift away from wheat due to limited export infrastructure of a land-locked country, like limited availability of rail cars.

The season began with exceptional subsoil moisture reserves. A snowy winter and intense spring melt left fields deeply saturated. However, extreme winter temperature fluctuations caused the ground to freeze up to 130 cm (51.2 inches) deep in parts of the main grain belt. This left subsoils partially frozen and excessively wet early in the month, creating brief field-access delays

Once fields dried, massive planting operations took off in mid-May. Temperatures in May hovered roughly 1°C (33.8 F) above the climatic norm with near-average precipitation. This warm, relatively dry window provided excellent conditions for machinery to cover vast areas quickly without being bogged down by spring mud.

In early June, unstable atmospheric fronts brought localized cyclones, short-term rain showers, and thunderstorms. This rain was crucial, as it replenished topsoil moisture right when the newly planted barley seeds were beginning to sprout and emerge. Please, see cumulative precipitation data in Wheat Production sections above.

Consumption

MY 2026/27 barley total consumption is forecast slightly lower than last year at 1.8 MMT. In line with historical consumption habits, most barley will be consumed on farm as animal feed, with a small remainder to be used for malting and other food purposes. Feed and Residual barley consumption is expected to decrease year-over-year in part because of returning to the normal year, after the bumper harvest in MY 2025/2026.

Kazakhstan's feed sector is closely tied to developments in its livestock and poultry industries, with feed demand steadily rising as animal inventories expand and commercial production gains scale. The sector still relies partly on on-farm mixing, especially for cattle and small ruminants, but there is a clear shift toward commercial compound feed, driven by investments in modern feed mills and integrated livestock operations. Most feed, including crops like barley, wheat, corn, and other feed grains, is grown and consumed on farm.

Kazakhstan's livestock inventories expanded across all major categories in 2026, with cattle up 3.9 percent, sheep up 1.4 percent, goats up 2.1 percent, pigs rising a notable 7.8 percent, and horses increasing 7.2 percent. Please, see Table 4 for more details. These increases point to strengthening animal agriculture and imply higher demand for compound feed, particularly for the faster-growing pig and horse sectors, which rely more heavily on commercial feed formulations. Growth in the cattle and small-ruminant herds will continue to support steady use of barley and other feed grains, while expanding poultry and livestock operations are likely to draw more commercially manufactured feed as on-farm resources become insufficient. Improved market returns for meat and dairy, alongside government

programs that stabilize feed grain prices and expand processing capacity, are expected to sustain this upward trend in feed demand through the coming marketing year.

Table 4. Cattle and Poultry Numbers as of June 1, 2026

	2026	2025	Change, %
Cattle	10,031,719	9,651,694	3.9
Including cows	4,483,468	4,382,988	2.3
Sheep	24,328,654	23,989,927	1.4
Goats	2,346,082	2,298,051	2.1
Pigs	586,120	543,541	7.8
Horses	5,380,469	5,020,186	7.2
Camel	329,534	321,333	2.6
Poultry	48,967,033	47,701,845	2.7

Source: [Bureau of National Statistics Cattle report](#)

Trade

With a slightly smaller estimated barley crop in MY 2026/27, barley exports are forecast slightly lower compared to the previous year at 1.5 MMT. Since the beginning of the marketing year, Kazakhstan has imported around 111,000 MT of barley from Russia, mainly to produce feed flour. Please see Table 5 for more details. As the ruble continues to weaken against the tenge, barley imports from the Russian Federation are more price competitive. That is why Post estimated barley imports in MY 2025/2026 at 120,000 tons. With the current grains import restriction Post estimated, that barley imports in MY 2026/2027 will be at minimal levels, at 10,000 tons to meet the barley seeds demand. Please, see Table 6 for more details.

Table 5. Barley imports

Partner Country	Rank	Unit				Year to Date		
			MY 2022/2023	MY 2023/2024	MY 2024/2025	07/24-04/25	07/25-04/26	%Δ
_World		T	375,834	299,666	90,842	82,352	111,434	35.31
Russia	1	T	375,820	298,531	74,106	65,619	111,418	69.8
China	2	T	0	1,125	16,710	16,710	0	-100
Canada	3	T	3	1	20	20	0	-100
France	4	T	8	8	3	3	12	300
Austria	5	T	0	0	2	0	3	0

Source: TDM LLC.

Kazakhstan's recent trade performance shows a sharp shift in market dynamics. After strong export growth through MY 2024/25 driven largely by large-volume shipments to Iran and China, exports contracted significantly in the July–April 2025/26 period, falling 36.8 percent year-over-year. Shipments to Iran declined from 1.09 MMT to 618,528 tons (-43 percent), due to geopolitical instability, while exports to China dropped by more than half. Kazakhstan experienced congestion at the Dostyk and Altyntkol border crossings with China, which led to periodic export restrictions by Chinese authorities during 2025-2026 due to overcapacity at rail terminals. In contrast, demand from regional partners strengthened: exports to Uzbekistan increased 52 percent to 217,239 tons, and shipments to Tajikistan rose 28 percent. Please, see Annex 2 for more details.

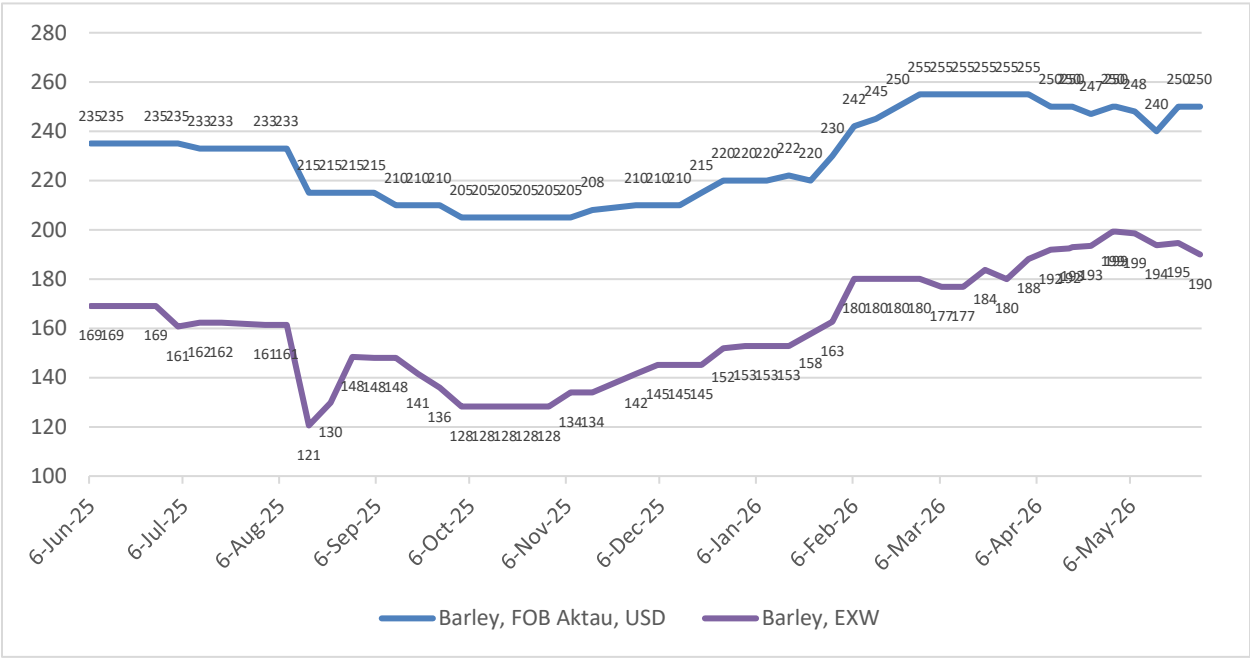
Barley from Kazakhstan [remains the most price-competitive](#) for Chinese importers. Average import prices for barley in China in February 2026 were reported at \$209/MT, or \$17/MT cheaper than Russian

barley and \$51/MT cheaper than barley from Australia. As of June 2026, the price of barley fell from \$189 to \$183/MT and the price at the Chinese border remained at \$240/MT, while the price in Aktau rose from \$235 to \$250/MT.

From April to May 2026 both barley price (domestic and export) indicators continued their upward trend, though with some volatility. Under EXW, the seller makes the grain available at their elevator, and the buyer assumes all costs and risks from loading to final delivery, including transport and export procedures. Domestic EXW prices strengthened through April, rising from around \$180 per metric ton (MT) to nearly \$190/MT, supported by steady domestic demand and tightening on-farm availability. May saw a short-lived rally, peaking near \$199/MT, reflecting limited spot supply. However, by early June, EXW values eased back to roughly \$190/MT, suggesting that the earlier surge had outpaced immediate demand.

FOB (Free on Board) at Aktau means the seller delivers Kazakh barley all the way to the vessel at Aktau Sea Port and loads it on board. Risk and cost shift to the buyer only after loading is complete. FOB Aktau prices remained elevated in April, near \$255–258/MT but gradually slipped through May. By early June, prices had corrected to approximately \$240/MT, indicating softer external demand by Central Asian countries. Located on the eastern shore of the Caspian Sea within the Aktau International Sea Commercial Port, [Akbiday grain terminal](#) serves as a vital export hub for Kazakhstan’s grain flows. The sole shareholder of the terminal is the Food Contracting Corporation.

Chart 2. Barley Prices, USD/MT



Source: [Apk-Inform](#) Note: FOB is the price shipped on boat on the Caspian Sea. EXW is inland elevator price.

Since May 15, 2025 the full-fledged Iran-Eurasian Economic Union (EAEU) free trade agreement (FTA) [entered into force](#), eliminating customs duties on about 90% of goods and reducing EAEU-to-Iran duties from roughly 20% to 4.5%. A [three-year roadmap](#) for cooperation to implement the agreement was signed on September 25, 2025, a comprehensive document that includes key sections such as transport logistics and, most importantly, the North-South Corridor. The agreement allows duty-free exports of up to 1.5

MMT of barley per year from EAEU countries, including Kazakhstan to Iran. Please see Annex 3 for more details.

The ongoing war in Iran has reduced the effectiveness of the EAEU–Iran FTA by disrupting trade flows, depressing Iranian import demand, and complicating logistics and payment channels. As reflected in Kazakhstan’s sharply lower grain exports to Iran due to geopolitical instability, conflict conditions hinder full utilization of the FTA’s preferential market access and slow implementation of key corridors such as the North–South transit route.

Table 6. Barley Production, Supply and Distribution

Barley Market Year Begins Kazakhstan	2024/2025		2025/2026		2026/2027	
	Jul 2024		Jul 2025		Jul 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2283	2283	2282	2282	2350	2350
Beginning Stocks (1000 MT)	202	202	203	203	296	316
Production (1000 MT)	3840	3840	3593	3593	3200	3200
MY Imports (1000 MT)	91	91	100	120	10	10
TY Imports (1000 MT)	79	79	100	120	10	10
Total Supply (1000 MT)	4133	4133	3896	3916	3506	3526
MY Exports (1000 MT)	2130	2130	1600	1600	1500	1500
TY Exports (1000 MT)	1914	1914	1600	1600	1500	1500
Feed and Residual (1000 MT)	1500	1500	1700	1700	1500	1500
FSI Consumption (1000 MT)	300	300	300	300	300	300
Total Consumption (1000 MT)	1800	1800	2000	2000	1800	1800
Ending Stocks (1000 MT)	203	203	296	316	206	226
Total Distribution (1000 MT)	4133	4133	3896	3916	3506	3526
Yield (MT/HA)	1.682	1.682	1.5745	1.5745	1.3617	1.3617
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Barley begins in October for all countries. TY 2026/2027 = October 2026 - September 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Annex 1. Wheat and Wheat flour Exports, WGE

Partner Country	Rank	Unit				Year to Date		
			MY 2022/2023	MY 2023/2024	MY 2024/2025	09/24- 04/25	09/25- 04/26	%Δ
World		WGE	10,873,507	7,825,401	10,193,508	7,322,889	9,739,897	33.01
Uzbekistan	1	WGE	4,649,345	3,438,083	4,378,554	3,210,566	4,317,942	34.49
Afghanistan	2	WGE	2,604,049	1,912,071	1,818,916	1,423,380	2,051,584	44.13
Tajikistan	3	WGE	1,187,564	1,124,941	1,385,364	995,478	1,893,611	90.22
Azerbaijan	4	WGE	276,427	2,595	696,881	537,381	200,800	-62.63
Italy	5	WGE	449,623	342,410	455,792	308,571	238,947	-22.56
Kyrgyzstan	6	WGE	34,992	85,645	421,409	252,731	384,044	51.96
China	7	WGE	429,571	624,593	222,954	179,566	34,992	-80.51
Turkmenistan	8	WGE	607,702	186,014	181,958	116,399	177,476	52.47
Algeria	9	WGE	0	0	181,026	8,755	154,798	1,668.11
Morocco	10	WGE	0	0	161,882	111,070	0	-100
Georgia	11	WGE	1,177	672	81,141	48,523	39,166	-19.28
Russia	12	WGE	74,800	59,585	58,970	37,267	46,690	25.29
Latvia	13	WGE	54,206	9,669	45,576	40,202	27,749	-30.98
Vietnam	14	WGE	0	0	17,727	0	0	0
Egypt	15	WGE	0	0	16,521	9,938	0	-100
Portugal	16	WGE	9,017	0	14,232	7,670	7,640	-0.39
Norway	17	WGE	7,160	4,791	11,500	8,000	6,400	-20
Netherlands	18	WGE	430	0	11,177	4,882	8,860	81.48
Belgium	19	WGE	1,778	8,187	10,320	10,320	18,373	78.03
Denmark	20	WGE	3,000	2,700	5,367	2,800	0	-100
Iraq	21	WGE	1,575	465	5,000	0	0	0
Poland	22	WGE	12,499	28	3,013	3,013	0	-100
United Kingdom	23	WGE	0	0	3,000	3,000	6,000	100
Turkey	24	WGE	155,741	16,953	2,264	2,198	21,625	883.85
United Arab Emirates	25	WGE	60	57	1,550	0	0	0
Mongolia	26	WGE	472	212	503	410	337	-17.8
Belarus	27	WGE	570	520	254	141	335	137.59
Armenia	28	WGE	194	273	204	197	27	-86.29
Iran	29	WGE	163,437	19	200	200	72,139	35,969.5
Germany	30	WGE	227	26	70	65	13	-80
United States	31	WGE	0	0	66	66	33	-50
Moldova	32	WGE	73	11	56	55	0	-100
Israel	33	WGE	43	26	44	44	15	-65.91
South Korea	34	WGE	0	34	13	1	71	7,000
Lithuania	35	WGE	133	49	2	2	0	-100
France	41	WGE	0	0	0	0	6,000	0
Oman	44	WGE	0	0	0	0	50	0
Pakistan	45	WGE	0	70	0	0	336	0
Tunisia	49	WGE	103,841	0	0	0	23,841	0

Source: TDM LLC.

Annex 2. Barley Exports, MT

Partner Country	Rank	Unit				Year to Date		
			MY 2022/2023	MY 2023/2024	MY 2024/2025	07/24- 04/25	07/25- 04/26	%Δ
_World		T	1,112,775	1,225,326	2,130,485	1,971,626	1,246,103	-36.8
Iran	1	T	436,327	62,027	1,217,744	1,094,564	618,528	-43.49
China	2	T	426,811	927,751	628,299	604,831	285,825	-52.74
Uzbekistan	3	T	160,409	165,635	152,270	143,339	217,239	51.56
Tajikistan	4	T	70,370	54,068	82,506	80,388	102,613	27.65
Azerbaijan	5	T	0	204	34,715	33,844	0	-100
Iraq	6	T	3,780	0	14,152	14,152	1,113	-92.14
Oman	7	T	257	256	399	399	0	-100
Turkey	8	T	154	0	220	0	0	0
Kyrgyzstan	9	T	0	3,236	93	93	14,466	15,454.84
United Arab Emirates	10	T	0	0	70	0	0	0
Afghanistan	11	T	11,821	11,097	17	17	2,625	15,341.18
Denmark	12	T	0	0	0	0	0	0
France	13	T	0	0	0	0	0	0
Netherlands	14	T	0	0	0	0	0	0
Israel	15	T	0	0	0	0	0	0
Turkmenistan	16	T	0	0	0	0	0	0
United Kingdom	17	T	0	0	0	0	0	0
Pakistan	18	T	68	69	0	0	0	0
Russia	19	T	2,667	984	0	0	3,695	0
Syria	20	T	110	0	0	0	0	0

Source: TDM LLC.

Annex 3. Iran-EAEU Trade Agreement summary

commodity/product	MFN/ Most Favorable Nation rate as of October 2025	Interim Agreement (Oct 2019-May 2025) Binding commitment	Quotas for EAEU countries	Full Fledged FTA (effective May 2025) Binding commitment inside the quota	Binding commitment outside the quota
Grains:					
-wheat, except durum	10%	MFN rate	3 million tons per year	0%	0.9 of MFN rate
- durum	20%	MFN rate	200,000 tons per year	0%	MFN rate
- corn	5%	MFN rate, but no more than 5%	-		0%
- barley		MFN rate, but no more than 5%, 10%-from April 20 through August 20	1.5 million tons per year	0%	MFN rate, but no more than 5%, 10%-from April 20 through August 20
- millet	10%	MFN rate	-		0%
- rice	10%	0,58 of MFN rate, but no more than 15%	-		0%
Legumes:					
- lentils, dry	5%	MFN rate, but no more than 5%	-		0%
- chick pea dry	10%	0,33 of MFN rate, but no more than 5%	25,000 tons per year	0%	0.33 of MFN rate, but no more than 5%
- beans	5%	MFN rate, but no more than 5%	3,000 tons per year		0.95 of MFN rate
- pea dry	5%	0,45 of MFN rate, but no more than 25%	300 ton per year	0%	0.45 of MFN rate, but no more than 25%
Oilseeds:					
- flaxseeds	5%	MFN rate, but no more than 5%	-		0%
- sunflower seeds	10%	MFN rate, but no more than 10%	100,000 tons per year	0%	10%
- soybeans	10%	MFN rate, but no more than 10%	-		0%
Vegetable oils:					
- sunflower oil crude	20%	0,5 of MFN rate, but no more than 10%	500,000 tons per year		0% 0,5 of MFN rate, but no more than 10%
- soybean oil crude	20%	0,5 of MFN rate, but no more than 10%	-		0% 0,5 of MFN rate, but no more than 10%
- rapeseeds oil crude	20%	0,5 of MFN rate, but no more than 10%	200,000 tons per year		0% 0,5 of MFN rate, but no more than 10%
Fats and margarine:					
- fats	5%	MFN rate	5,000 tons per year	0%	MFN rate
- margarine (except liquid)	40%	MFN rate	5,000 tons per year	0%	MFN rate
Meals:					
- rapeseed meal	10%	0,75 of MFN rate, but no more than 7.5%	-		0%
- soybean meal	20%	MFN rate, but no more than 10%	-		0%
- sunflower meal	10%	0,75 of MFN rate, but no more than 7.5%	-		0%
Meats:					
- frozen chicken carcasses	26%	MFN rate	5,000 tons per year	0%	MFN rate
- mutton	4%	MFN rate, but no more than 5%	-		0%
- cuts of cattle	4%	0,385 of MFN rate, but no more than 10%	-		0%

Source: [EAEU-Iran FTA](#)

Attachments:

No Attachments