

Expansa

Who are we?

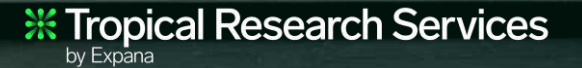
Your market
intelligence partner,
guiding the decisions
that feed our world

One company.
One brand.
One platform.

About us

At Expana, we provide the critical market insights, so our clients can make informed decisions with confidence. We bring clarity to the world's data. Our intelligence spans over 27,000 price series and 500+ price forecasts, so our clients have full visibility of the whole supply chain. This enables businesses to manage volatility, navigate strategically and improve margins. For more than 200 years, we have built trust and credibility in the market through our deep specialist knowledge and constant innovation. We are industry experts. And we are part of the bigger picture.

We feed the world with the data it needs. Our intelligence is integral to our clients' businesses and the entire supply chain. Our clients play a vital role in the world. Their decisions have a huge impact on people, communities and industries. And our data enables this. Every single day. We are Expana, and our market intelligence delivers a more resilient, a more transparent and a more sustainable supply chain.



Market Prices
News
Analysis

Fundamentals &
Research

Weather Analytics

Forecasts
&
Cost Modelling

Data Integration
API

Our Expana Brands



TRS collects, collates and analyses, research and data as to a variety of tropical commodity products, including coffee, cocoa, sugar, cane ethanol, tropical oils and tropical grains and oilseeds.



The original agri-food price reporting agency providing exclusive data for the red meat, poultry, eggs, seafood and plant protein markets.



Exclusive country-level supply and demand forecasts for grain, oilseeds, animal feed, biofuel and malting barley sectors. Informs purchasing, trading and risk management strategies across global markets.



Your connection to the global animal nutrition and feed industry, and the world's only price reporting and news agency aligned to IOSCO guidelines exclusively for animal nutrition.

+24k
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+5000
Customers

+260
Employees

+5000
Price
Benchmarks

+600
Price Forecasts

+15
Global Locations

The Benefit of Working with Us



Single SaaS cloud platform for commodity price intelligence



Leverage trusted data to improve purchase strategy and buyer-supplier negotiations









Intelligence to defend price strategy on private label and branded products

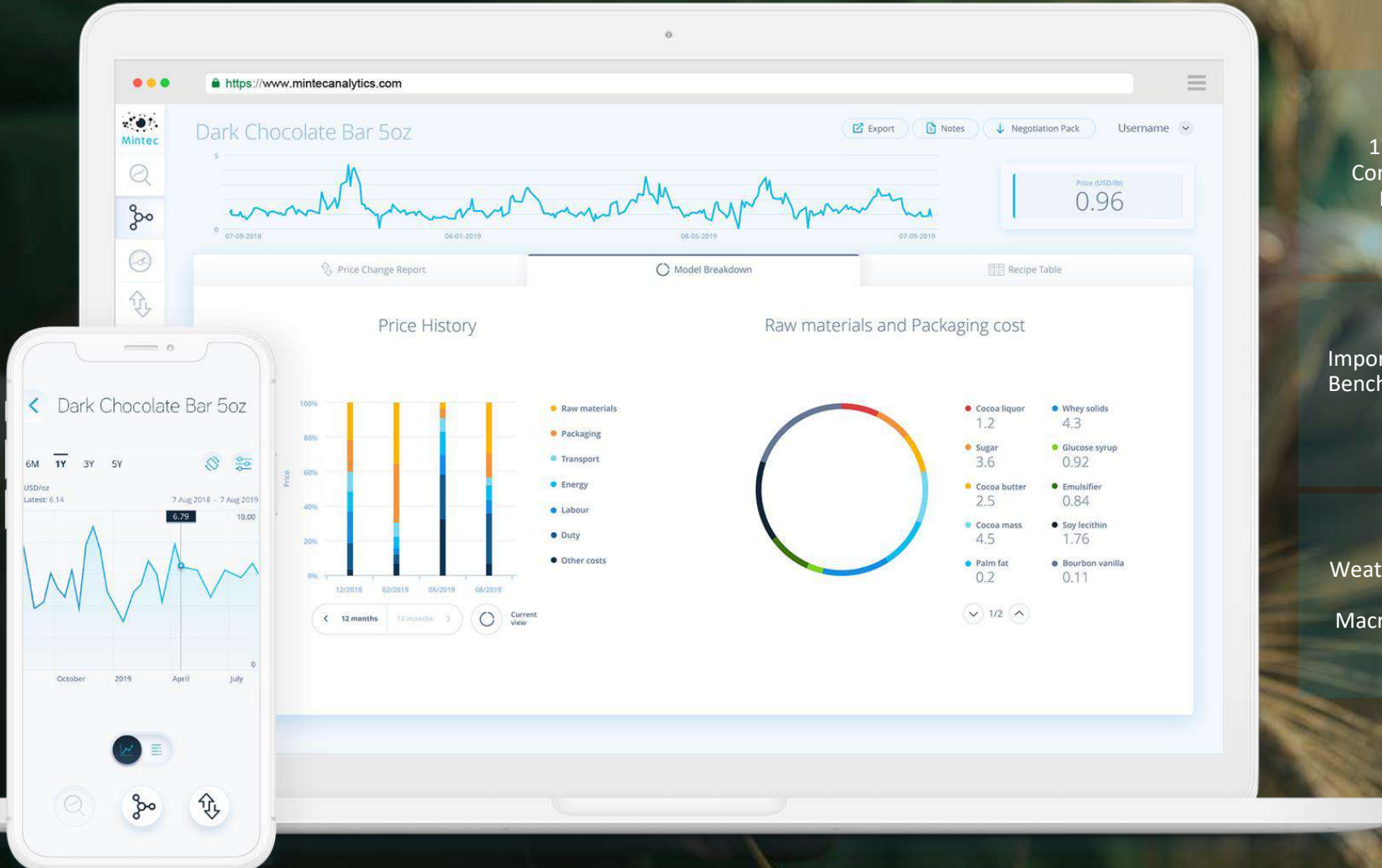


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Negotiate Price | Analyze Spend | Predict Costs | Control Budgets

A selection of our 5,000+ clients

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<p> Industrial Manufacturers & Processors</p> <p>BDR THERMEA GROUP KIER</p> <p>thyssenkrupp WEBER-HYDRAULIK</p> <p>VELUX TI Automotive</p>		<p> Others</p> <p>PRIMARK Argos</p> <p>Staples BODÉN & LINDEBERG</p> <p>Kingfisher SIEGWERK</p>	



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World grain report

strategiegrains

World Grain report

WHEAT: new harvest cut for 23/24 – outlook tight despite weak demand
 BARLEY: outlooks still tight for main exporters in 23/24 – world stocks expected at a very low level
 CORN: market tension in 22/23 giving way to equilibrium in 23/24 – corn could potentially increase its share of demand

editorial

Tightness for world wheat and especially barley markets in 2023/24, but greater equilibrium for corn – for the three cereals combined, small projected demand growth helps stabilise combined stocks

In recent weeks, grain markets reeled from the renewed tension surrounding Black Sea export capacity. It began with the cessation of the Black Sea grain deal following Russia's withdrawal, and was amplified by Russian bombardments of the port of Odesa, then the Danube ports of Rani and Ibrail, which represent an alternative route now the seaborne shipping route has ended. Ukraine retained with a drone strike on a Russian warship in the port of Novorossiysk, believed by an attack on an oil tanker. As a result, countries uncertainly now exists over export capacities from the Black Sea region, and freight costs were seen. We are therefore revising our forecast for Ukraine wheat, down to 19.2 Mt for corn, 11.2 Mt for wheat, and 1.1 Mt for barley. Despite these recent setbacks, we believe that Ukraine's Danube ports will continue to open, and that transport via EU border countries will remain. Furthermore, the possibility that the Black Sea deal could be resumed at some point in the coming months should certainly not be ruled out. We have forecast very substantial grain reports from the US and its grains remaining the most competitive in world markets. The Black Sea tensions have seen price volatility in Europe. Meanwhile, strong leading patterns have also been especially helpful for its probable impact on the barley market. Australia's DWS index has risen to new highs, and the Australian dollar has risen to new highs. The Chinese government's support for the French barley deal at the same time, and the insufficient supply to maintain its pipeline to other destinations, and the wheat market.

	2022/23	2023/24
July-June	1307/23	10/08/23
carry-in	218.9	216.0
production	729.9	730.5
trade	185.6	189.8
total demand	720.3	721.5
carry-out	228.5	225.0
stock/use ratio	31.7%	31.2%

	2022/23	2023/24
July-June	1307/23	10/08/23
carry-in	227.0	224.1
production	763.4	764.0
trade	196.4	197.6
total demand	754.4	755.6
carry-out	228.2	222.1
stock/use ratio	31.3%	30.8%

	2022/23	2023/24
July-June	1307/23	10/08/23
carry-in	19.5	26.2
production	151.5	151.7
trade	30.9	21.4
total demand	147.4	148.3
carry-out	23.6	21.5
stock/use ratio	16.0%	15.9%

	2022/23	2023/24
October-September (MT)	1307/23	10/08/23
carry-in	278.9	278.6
production	1103.2	1105.4
trade	174.9	178.3
total demand	1117.9	1118.6
carry-out	264.2	266.5
stock/use ratio	23.6%	23.7%

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World grain report / Wheat / 2023 / 2024

1.7. WHEAT PRODUCTION IN MAIN COUNTRIES (2023/24 AND 2022/23)

	Area (Mha)			Yield (t/ha)			Production (Mt)			of which Soft wheat		
	2022/23	2023/24	Δ/prev. report	2022/23	2023/24	Δ/prev. report	2022/23	2023/24	Δ/prev. report	2023/24	Δ/prev. report	
USA	14.96	15.20	0.00	3.13	3.03	-0.09	44.90	46.05	-0.47	44.52	-0.40	
Canada	10.09	10.54	0.00	3.35	2.98	-0.11	33.92	31.41	-1.18	26.50	-0.31	
Australia	13.05	12.78	0.00	3.04	2.10	-0.50	39.69	26.57	0.00	26.41	-0.01	
Argentina	5.90	5.70	-0.40	2.14	3.14	0.00	12.60	17.99	-1.26	17.62	-1.26	
EU 27	24.34	24.26	-0.01	5.44	5.44	-0.06	132.45	131.99	-1.42	124.73	-1.44	
Ukr. King.	1.81	1.75	-0.06	8.59	8.12	-0.26	15.54	14.23	-0.94	14.23	-0.94	
Russia	29.43	28.88	-0.03	3.43	2.96	-0.09	101.07	85.95	0.00	85.01	0.00	
Ukraine	5.78	4.94	0.00	3.83	3.97	0.04	22.17	19.81	0.00	19.61	0.00	
Kazakhstan	12.81	12.62	0.00	1.28	1.06	-0.03	16.40	13.59	0.00	13.09	0.00	
India	31.91	32.24	0.00	3.10	3.14	0.00	99.00	101.95	0.00	99.75	0.00	
China	23.95	23.95	0.00	4.67	4.64	0.00	111.82	111.22	0.00	111.22	0.00	
Algeria	2.06	2.01	-0.03	1.50	1.17	-0.00	3.08	2.34	-0.00	2.48	-0.03	
Morocco	2.43	2.54	0.00	1.11	1.52	0.00	2.70	3.86	0.00	3.86	0.00	
Tunisia	0.52	0.46	0.00	2.20	1.28	0.00	1.15	0.55	0.00	0.97	0.00	
Egypt	1.53	1.55	0.00	6.34	6.33	-0.00	9.70	9.70	0.00	9.70	0.00	
Turkey	7.05	7.41	0.00	2.50	2.54	-0.00	17.62	18.61	0.00	18.29	0.00	
oth. Near East	0.50	0.72	0.12	1.85	2.00	-0.00	17.65	20.32	0.00	19.52	0.19	
World	223.57	224.85	-0.27	3.42	3.29	-0.01	764.04	740.67	-3.37	708.89	-2.40	

1.8. MAIN CHANGES TO WORLD SOFT WHEAT PRODUCTION 2023/24 COMPARED WITH 2022/23 (MT)

Country	Change (MT)
USA	1.4
Canada	-1.6
Australia	-12.6
Argentina	5.2
EU 27	-0.6
Russia	-14.8
Ukraine	-2.6
Kazakhstan	-2.7
India	2.3
China	-0.6
North Africa	0.8
Mid East	3.3
World	-21.6

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Grains
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 Durum
 Malting Barley

Biofuels
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 Industrial by-products

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INTEGRATE

ANALYSE

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From in depth features and interviews to uncovering the latest on developing situations, Urner Barry has the exclusive on what's happening in the protein industry.

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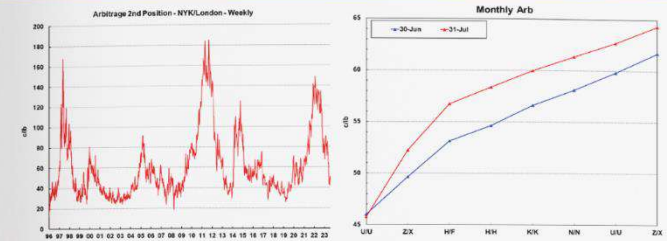
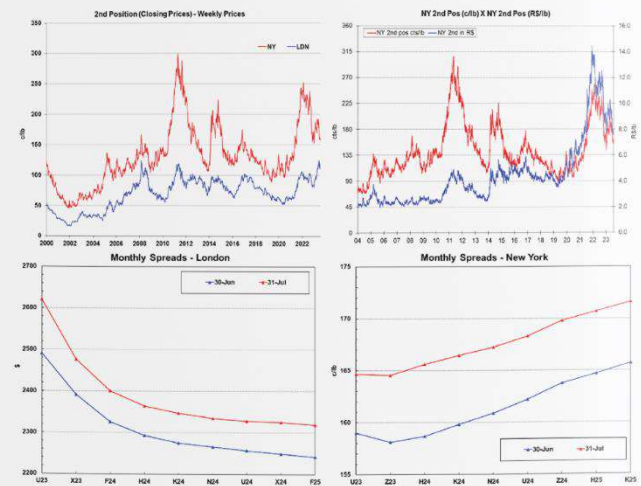
COFFEE JULY REVIEW

SUMMARY

There was very little change in our coffee balance sheet last month. Consumption data remains weak, but not sufficiently weak to warrant a further reduction in our 2022/23 global consumption estimate. Partial results from our end season stocks survey in Brazil are broadly in line with our production estimate for 2022/23 of 63.9 mn bags. Results from our latest crop survey in Vietnam confirm the poor cherry survival for the 2023/24 crop that was noted a month ago, leading to no change in our 2023/24 production forecast. On an "all-coffee basis" high prices appear to have stimulated sufficient production and reduced consumption growth to the point where an overwhelming surplus can reasonably be expected, although we may need to wait for the 2024/25 crop to be harvested before such a surplus hits the market. The estimated deficit for 2022/23 stands at -5.2 mn bags. For 2023/24 we expect a surplus of +3.2 mn bags. For 2024/25, the prospect of record production in Brazil and Vietnam gives a potential "normal weather" surplus of nearly +10 mn bags. With arabica prices close to cost of production but robusta prices still providing historically high margins for farmers, there would appear to be more downside potential for prices in robusta than in arabica. The main risk to this scenario would come from a negative impact on production in Asia should the developing El Nino event lead to damaging drought in the region's major coffee producing countries. The Australian weather service is currently forecasting a very strong event peaking towards the end of the year, although the latest NOAA data is showing development to be not as strong as the events of 1982/83, 1997/98 and 2015/16.

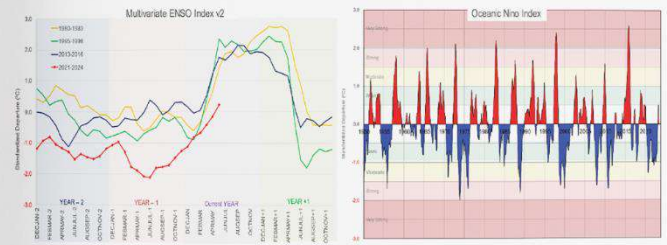
PRICES

On a continuation basis, robusta fell by -\$15 in July to end the month at \$2,476 on the second position (-1%), while arabica rose by +5.55 c/lb to 164.55 c/lb (+3%). The structure for arabica was little changed with U23/U24 moving from -3.20 c/lb at the end of June to -3.65 c/lb a month later. The robusta structure was stronger with U23/U24 starting the month at +\$234 and finishing at +\$293. The U/U arb ended the month at 45.8 c/lb, little changed from 46.0 c/lb at the end of June. In BRL terms, prices closed the month at BRL 7.93 c/lb, +3% higher on the month.



EL NINO

The latest El Nino update from NOAA shows the current El Nino continuing to strengthen, but it lags behind the intensity of the very strong El Ninos that have in the past caused significant problems with drought in Asia.



In terms of potential impact on coffee production, the biggest risk comes to robusta production in Asia, with the threat of an early end to the 2023 rainy season in Vietnam and a late start to rains in 2024 adversely affecting the 2024/25 crop and the potential for drier than normal weather in Indonesia. In Brazil, warmer than normal temperatures normally occur during El Nino events, reducing (but not eliminating) the frost risk during May – September.

BRAZIL

Ceafe have released the provisional export data for June, which concludes the 2022/23 crop year. June exports are put at 2.64 mn bags, -17% lower yoy and the lowest June export volume since 2018. Cumulative crop year exports for 2022/23 of 35.58 mn bags are -10% lower yoy and the lowest for 5 years.

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Sugar

Cocoa

Coffee

Palm Oil

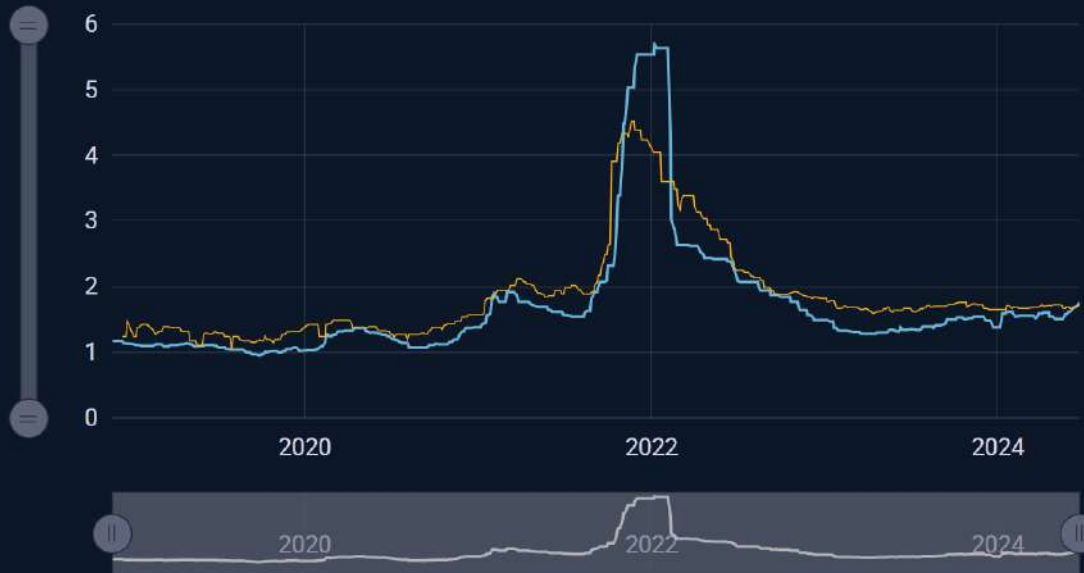
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Thank you