

Agricultural Trade

Global income growth and population gains are projected to continue during the 2013-2022 projection period. This growth provides a foundation for continued gains in world demand and trade for agricultural products. Although agricultural prices decline in the near term, continued growth in global demand for agricultural products holds price at historically high levels.

Developing countries are projected to be the main source of growth in world agricultural demand and trade. Food consumption and feed use are particularly responsive to income growth in developing countries, with movement away from staple and/or traditional foods and toward more diversified diets. Per capita meat consumption is projected to rise rapidly, with poultry rising much faster than pork, and pork slightly faster than beef. Agricultural product demand in developing countries is further reinforced by population growth rates that are about twice the average of those in developed countries.

The combined region of Africa and the Middle East is projected to have some of the strongest growth in food demand and agricultural trade over the coming decade. With rapid increases in population and per capita incomes, the region is projected to account for more than half of the increase in world poultry and beef imports. Strong policy support for domestically produced meat also motivates growth in feed grain and protein meal imports, especially by countries where land constraints or agroclimatic conditions limit an expansion of domestic crop production. As a result, the region's share of the increase in world imports is projected to be about 20 percent for coarse grain, 53 percent for wheat, 50 percent for rice, and 25 percent for soybean oil.

General International Assumptions

Trade projections to 2022 are founded on assumptions concerning trends in foreign area, yields, and use as well as the assumption that countries comply with existing bilateral and multilateral agreements affecting agriculture and agricultural trade. The projections incorporate the effects of trade agreements and domestic policies in place or authorized by November 2012. International macroeconomic assumptions were completed in October 2012.

Domestic agricultural and trade policies in individual foreign countries are assumed to evolve along their current paths, based on the consensus judgment of USDA analysts. In particular, long-term economic and trade reforms in many developing countries are assumed to continue. Similarly, the development and use of technology and changes in consumer preferences are assumed to continue evolving based on past performance and analysts' judgments regarding future developments.

Mexico is projected to be another large growth market for meat, grains, and oilseeds. A sustained increase in Mexico's per capita meat demand over the next decade provides incentives to expand livestock production in that country as well as to import more meat. Imports of beef, pork, and poultry are projected to rise by 67, 32, and 50 percent, respectively. Mexico accounts for about one-fourth of the growth in world pork and poultry imports. For corn, Mexico is second only to China in projected import growth over the next 10 years.

At the beginning of the projection period, world stock levels are low for most crops and world market prices are high for most crops and meats. Livestock producers face high feed prices. Although stocks are low for most commodities in most countries, there are several notable exceptions. Policies in China and India have led to the accumulation of large cotton stocks. Similarly, Thailand and India currently hold unusually large rice stocks. How these countries draw down stocks to more normal levels has implications for world cotton and rice markets.

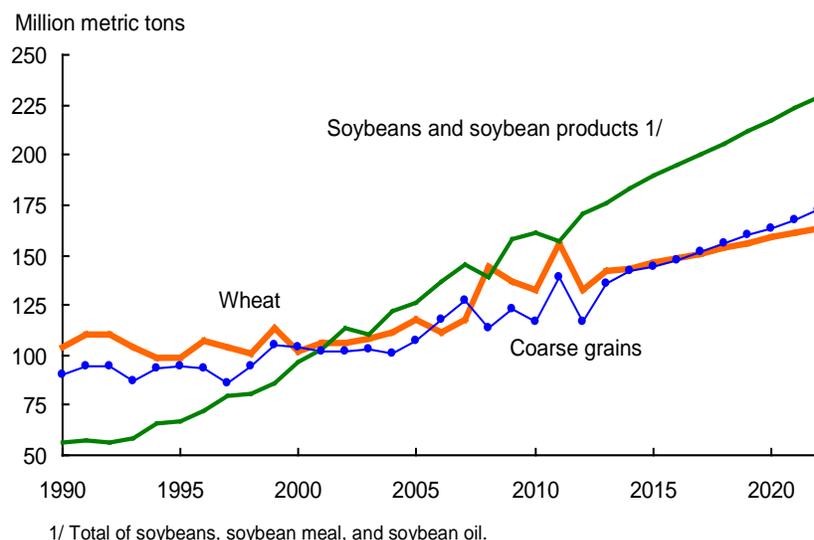
While agricultural prices initially fall from recent high levels, they are projected to remain above pre-2007 levels during the coming decade. The main contributing factors are increasing per capita incomes in low- and middle- income countries that continue to stimulate world demand for grains, oilseeds, and livestock products; a continuing depreciation of the U.S. dollar; high energy prices; and some further growth in biofuels production.

Prices for vegetable oils are projected to rise relative to prices for protein meals. Oilseed prices rise slightly more than grain prices, and meat prices rise relative to the costs of feeds, both for protein meals and grains.

World agricultural production is projected to rise in response to high prices and technological enhancements. However, a number of factors are expected to slow the rate of production growth. Many countries have a limited ability to expand planted area, and the expansion that does occur takes place on land with lower productive capacity. The growth rate in world-average crop yields, especially yields for cereal crops, has been slowing for nearly two decades, to some extent as a result of reduced research and development funding. Water constraints in some countries are impeding the expansion in irrigation. Where irrigation water is pumped from deep wells, the energy cost of pumping is projected to continue to increase due to falling water tables. Costs of other production inputs such as fertilizers and chemicals also are likely to increase.

Countries that export a large amount and a wide range of agricultural products, such as Argentina, Australia, Brazil, Canada, the European Union (EU), and the United States, are expected to remain important in global trade in the coming decade. But countries that have made significant investments in their agricultural sectors and are increasingly pursuing policies intended to encourage agricultural production, including Russia, Ukraine, and Kazakhstan, are expected to have an increasing presence in export markets for basic agricultural commodities.

Global trade: Wheat, coarse grains, and soybeans and soybean products



Global trade in soybeans and soybean products has risen rapidly since the early 1990s, and has surpassed global trade in wheat and total coarse grains (corn, barley, sorghum, rye, oats, millet, and mixed grains). Continued strong growth in global demand for vegetable oil and protein meal, particularly in China and other Asian countries, is expected to maintain soybean and soybean-product trade well above wheat and coarse grain trade throughout the next decade.

- Globally, the total area planted to grains, oilseeds, and cotton is projected to expand about 0.45 percent per year. However, in most countries, area expansion is less than 0.4 percent per year, and cropped area even contracts in some countries. Area expands more rapidly in countries with a reserve of available land and policies that allow farmers to respond to higher prices. Such countries include Russia, Ukraine, Brazil, Argentina, some other countries in South America, and some countries in Eastern Europe and Sub-Saharan Africa. About two-thirds of the projected growth in global production is derived from rising yields, even though growth in crop yields is projected to continue slowing.
- The market impact of slower yield growth is partially offset by slower growth in world population. Nonetheless, population growth is a significant factor driving overall growth in demand for agricultural products. Additionally, rising per capita income in many countries supplements population gains in the demand for vegetable oils, meats, horticultural and dairy products, and grains. World per capita use of vegetable oils is projected to rise 17 percent over the next 10 years, compared with 7 percent for meats and 8 percent for total coarse grain. In contrast, per capita use of wheat and rice is projected to decline nearly 1 percent.
- Increasing demand and high prices for grains, oilseeds, and other crops, provide incentives to expand the global area under cultivation and the intensity of cropping the land. The largest projected increases in the area planted to field crops are in the former Soviet Union (FSU), and Sub-Saharan Africa. Large expansions are also projected for Brazil, Indonesia, and Argentina, including some uncultivated land brought into soybean and palm oil production in response to increased world demand for vegetable oils.

Demand for Biofuel Feedstocks

The global demand for feedstocks used to produce ethanol and biodiesel is projected to continue growing, although at a slower pace than in recent years. Expansion will continue to depend on biofuels policies.

The United States, Brazil, the European Union (EU), Argentina, Canada, China, and Indonesia, accounted for more than 90 percent of world biofuel production, consumption, and trade in 2012. Their dominance in global biofuels markets is expected to change little in the coming decade. Between 2013 and 2022, aggregate production in these countries is projected to rise about 30 percent for biodiesel and 40 percent for ethanol.

Country Assumptions and Projections

EU. The EU is the world's largest biodiesel consumer and the largest biofuels importer. Biodiesel and ethanol production are projected to increase 45 percent and 60 percent, respectively, between 2013 and 2022. To boost biodiesel production, the EU increases oilseed production and imports of oilseeds and vegetable oil feedstocks, mainly from Ukraine and Russia. Use of animal fats and used cooking oils also increase. Biodiesel imports, mainly from Argentina, rise steadily. Over 80 percent of the expansion in ethanol production comes from increased use of wheat and corn as feedstocks. EU ethanol imports, mainly from Brazil, are assumed to capture an increasing share of EU domestic use.

Brazil. In Brazil, the world's second-largest ethanol producer, sugarcane-based ethanol production is projected to increase 90 percent, primarily to meet increasing domestic demand for transport fuel with higher ethanol blends. Exports to the EU and the United States rise as well. Soybean oil-based biodiesel production increases 50 percent. Most of Brazil's biodiesel production is expected to be used domestically.

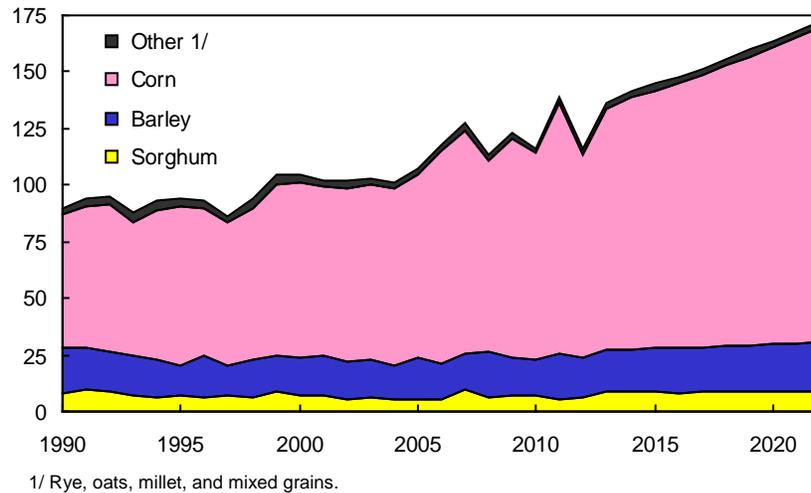
Argentina. Argentina's biodiesel production is projected to expand 80 percent between 2013 and 2022. A large share of the increased production goes to exports, which are supported by a tax structure that favors exports of biodiesel relative to soybean oil. However, domestic biodiesel use is assumed to also rise in response to a mandated increase in the domestic blend rate. Argentina's corn-based-ethanol production doubles, supported by a growing gasoline market and a rising blend rate.

Canada. Ethanol production is projected to increase 35 percent, with corn imports accounting for an increasing share of the feedstock. Biodiesel production climbs about 28 percent, with rapeseed (canola) oil providing more than 40 percent of the feedstock. Most of the biodiesel output is consumed in Canada, but limited amounts are exported to the United States and the EU. Biofuel exports and imports are projected to remain under 10 percent of production and use.

China. In 2012, 4.6 million tons of corn and 1 million tons of wheat were used to produce fuel ethanol. China has policies to limit further expansion of grain- and oilseed-based biofuel production for transportation fuel use. Thus, no significant expansion is projected.

Global coarse grain trade

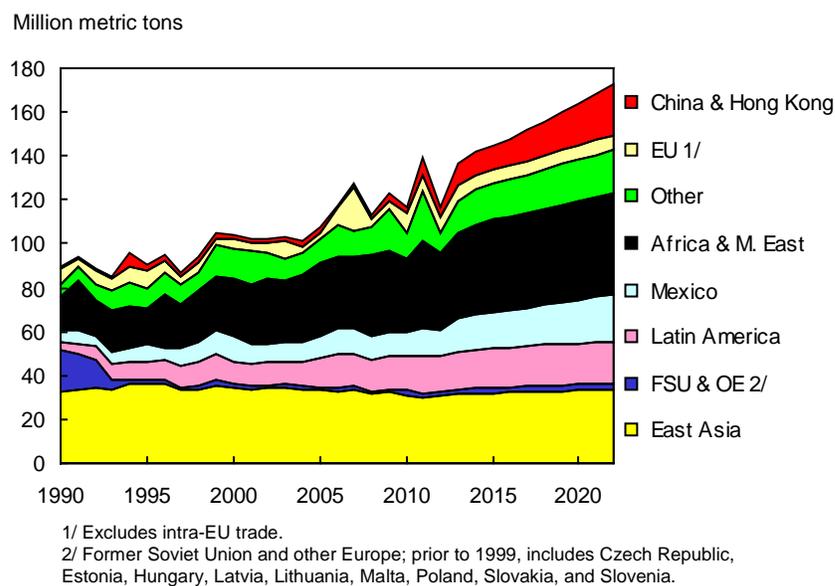
Million metric tons



World coarse grain trade is projected to increase 27 percent between 2013/14 and 2022/23. During this period, corn is expected gain an increasing share of world coarse grain trade. The expansion of livestock production in feed-deficit countries continues to be the principal driver of growth in coarse grain trade, particularly in the Middle East, North Africa, and Asia.

- During the last decade, the percentage of global coarse grain used for feed has declined while the share going to food, seed, and industrial uses has increased. In the projections, the expansion in feed use increases more rapidly than food use. However, industrial uses, such as starch, ethanol, and malt production, increase more than twice as fast as feed use, although from a much smaller base.
- Corn is the dominant feed grain traded in international markets, accounting 80 percent of world coarse grain trade at the end of the projection period. Barley has the next largest share (13 percent), followed by sorghum (5 percent). The trade share of the other coarse grains, mostly oats and rye, continues to decline slowly and falls below 2 percent by 2022.
- Corn's share of world coarse grain trade has risen steadily. Increasing use of modern varieties and inputs has resulted in corn area and yield growth rates that are more rapid than for other grains. Demand has increased due to corn's preferred qualities for feed, biofuels, and other industrial uses.
- Commercialization of livestock feeding has been a driving force behind the growing dominance of corn in international feed grain markets. Ruminants, such as cattle and sheep, are capable of digesting a broad range of feedstuffs, making demand price-sensitive across alternate feed sources. However, as pork and poultry production become increasingly commercialized throughout the world, higher quality feeds are used, boosting the demand for corn and soybean meal.

Global coarse grain imports

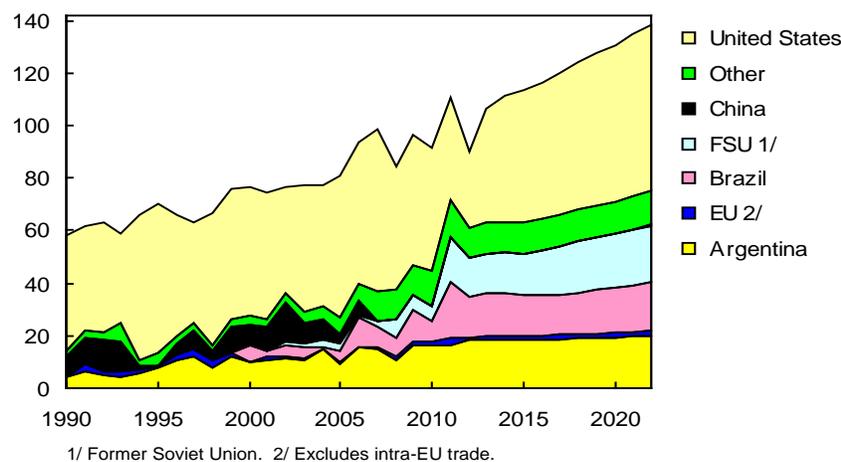


World coarse grain trade is projected to increase by 36 million tons (27 percent) from 2013/14 to 2022/23.

- Growth in coarse grain imports is closely linked to expansion of livestock production in regions unable to meet their own feed needs. Key growth markets include China, Mexico, the Middle East, Southeast Asia, and North Africa.
- China's imports of corn are projected to rise steadily and reach 19.6 million tons by 2022/23. China's strengthening domestic demand for corn is driven by its expanding livestock and industrial sectors. The increase in China's imports accounts for 40 percent of the projected growth in world corn trade.
- Imports by Africa and the Middle East account for about 20 percent of the growth in world coarse grain trade through 2022/23, as rising populations and increasing incomes sustain strong demand growth for livestock products.
- Mexico's corn imports are projected to rise from 9 million tons in 2012/13 to 17 million in 2022/23. During the same period, Mexico's sorghum imports rise rapidly from reduced levels in recent years to 4.2 million tons, mostly in response to increased U.S. supplies. Altogether, the growth in Mexico's coarse grain imports represents more than one-sixth of the increase in global coarse grain trade during the coming decade. This reflects increased meat consumption, which stimulates an expansion in domestic meat production as well as increased meat imports.
- Southeast Asian corn imports rise 3.6 million tons (49 percent) by 2022 in response to increased demand from livestock producers. The region accounts for 11 percent of the growth in world corn imports.
- In East Asia—excluding China—environmental constraints on expanding livestock production, and increasing imports of selected cuts of meat greatly limit the growth in coarse grain imports. South Korea is the only country projected to show much growth in coarse grain imports.

Global corn exports

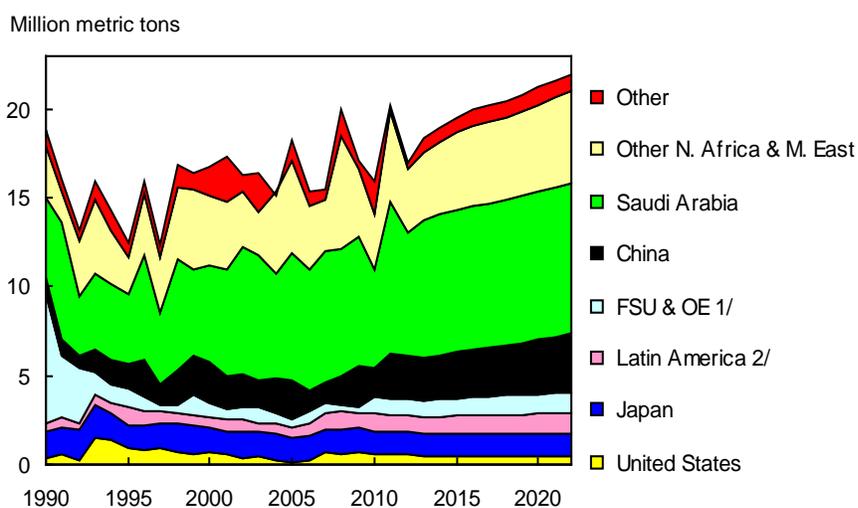
Million metric tons



U.S. corn exports declined sharply in 2010/11-2012/13, largely due to weather-induced production shortfalls. Meanwhile, exports from Brazil, the former Soviet Union (FSU), and Argentina have continued to rise. U.S. corn exports are projected to rebound in 2013/14 and then trend upward to a record high by 2022/23. However, the U.S. share of world corn exports only rises to 46 percent, well below the 65 percent average share during the two decades preceding 2010/11.

- Corn exports from the FSU, mostly Ukraine, rise nearly 6.6 million tons (43 percent) to nearly 22 million tons by 2022. Favorable resource endowments, increasing economic openness, wider use of hybrid seed, and greater investment in agriculture all stimulate corn production in this region. Although FSU feed use of corn rises rapidly in the projections, the region's corn exports increase twice as much as any exporting region other than the United States. The FSU becomes the world's second-largest corn exporter as its shipments surpass Argentina's.
- Argentina's corn area and exports are projected to stagnate in the early years of the projections due to the continuation of quantitative export controls. Argentina drops to the world's third-largest corn exporting country.
- Brazil's corn exports have quadrupled during the last 7 years. Second-crop corn following soybeans, a large share of which is produced in Mato Grosso, has risen in response to high prices. This corn is not in a good location to meet domestic demand, and tends to get exported when port capacity is not occupied with soybeans. As corn prices drop in the first half of the next decade, Brazil's corn exports are constrained by high transport costs. During the latter part of the projection period, corn exports are projected to increase in response to increasing world prices and improved export infrastructure.
- In the EU, corn used for ethanol production is projected to increase during the coming decade. However, it maintains exports of more than 1.5 million tons as it takes advantage of its lower transportation costs to parts of North Africa and the Middle East.
- The growth rate in corn exports from the Other Europe region is faster than from any other exporter, although from a small, drought-constrained base. Exports from Serbia to the EU account for most of the increase.

Global barley imports



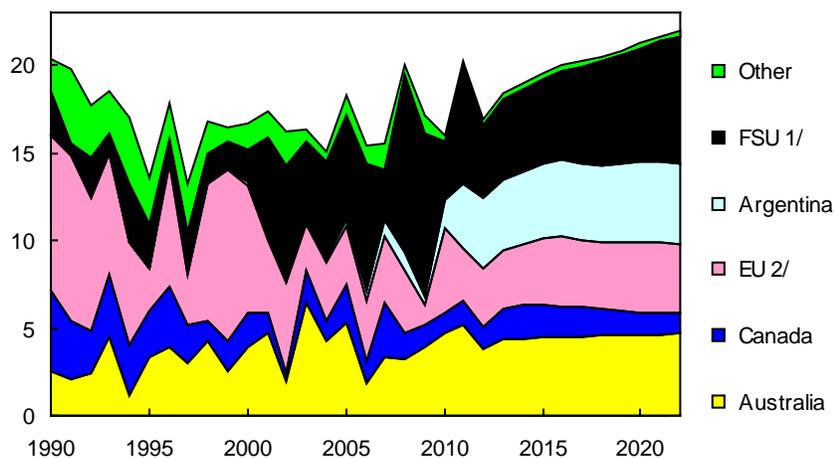
1/ Former Soviet Union and other Europe; prior to 1999, includes Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia, and Slovenia.
2/ Includes Mexico.

Global barley trade is projected to expand by 3.6 million tons (20 percent) during the projection period and reaches 22 million tons by 2022. Rising demand for both malting and feed barley underpins the increased trade.

- Feed barley imports by the North African and Middle Eastern countries are expected to grow steadily over the next decade. This region accounts for 62 percent of the projected growth in world barley imports during the coming decade, and by 2022/23 imports from these countries account for 63 percent of total world imports.
- Saudi Arabia remains by far the world's leading importer of barley, accounting for about 38 percent of world imports in 2022/23. However, its share declines slightly during the projections as the barley imports of many other countries climb at a faster rate. Saudi Arabia's barley imports are used primarily as feed for sheep, goats, and camels.
- Among countries in the Middle East, Iran's barley imports are projected to experience the fastest growth rate over the next decade. Total imports by other countries in North Africa and the Middle East are projected to grow more slowly, but still account for about a fourth of the increase in world barley trade.
- International demand for malting barley is boosted by strong growth in beer demand in some developing countries, most notably in China—the world's largest malting-barley importer. China's domestic malting-barley production is increasing, but imports also rise during the projection period. Australia and Canada are China's main sources of malting barley.

Global barley exports

Million metric tons

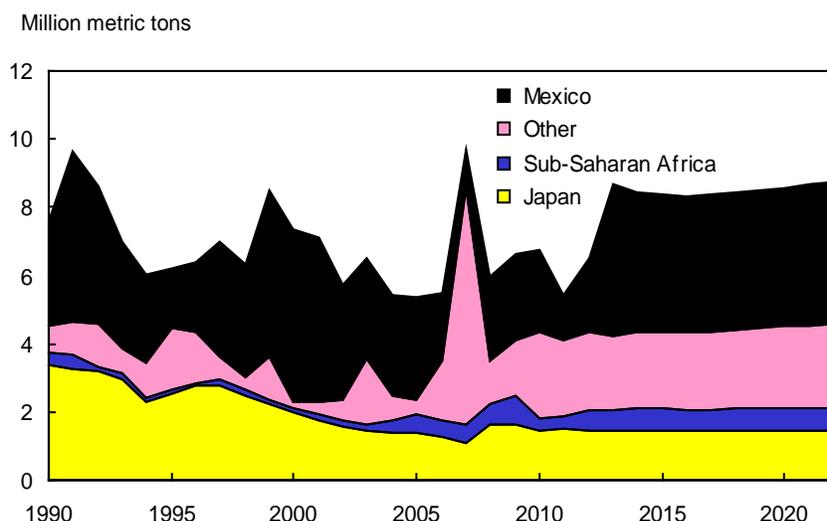


1/ Former Soviet Union and other Europe; prior to 1999, includes Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia, and Slovenia.
2/ Excludes intra-EU trade.

Australia, Argentina, the EU, Ukraine, and Russia are expected to be the major barley exporters during the coming decade.

- Australia's barley exports are expected to rebound after a drought-reduced harvest in 2012 and to rise slowly during the coming decade. The country remains the world's largest barley exporter
- Argentina's barley exports have risen sharply in recent years. Export restrictions for wheat have caused a shift in winter grains production from wheat to barley. Expansion in the barley area has occurred in the southern part of the country, and barley has been used for double-cropping with soybeans in the north. The country's barley exports are projected to remain large in the future. Other South American countries and Saudi Arabia are the main buyers of feed barley. Malting barley is mostly exported to Brazil.
- Barley exports by the FSU are projected to reach 7.3 million tons by 2022/23, with Ukraine accounting for 3.4 million tons and Russia accounting for 2.5 million tons. All of Ukraine's exports are feed-quality barley. The most rapid growth in barley exports, albeit from a small base, is projected for the Other FSU region, where Kazakhstan is expected to increase exports, especially to Iran. Total FSU exports are projected to account for 73 percent of the increase in world exports over the projection period.
- The EU's barley exports are projected to climb modestly during the coming decade, but remain well below the levels of the late 1990s.
- Malting barley commands a substantial price premium over feed barley. That quality premium is expected to influence planting decisions in Canada and Australia where malting barley's share of total barley area is expected to rise during the next 10 years. However, Canada's total area planted to all barley continues to decline as canola remains more profitable.

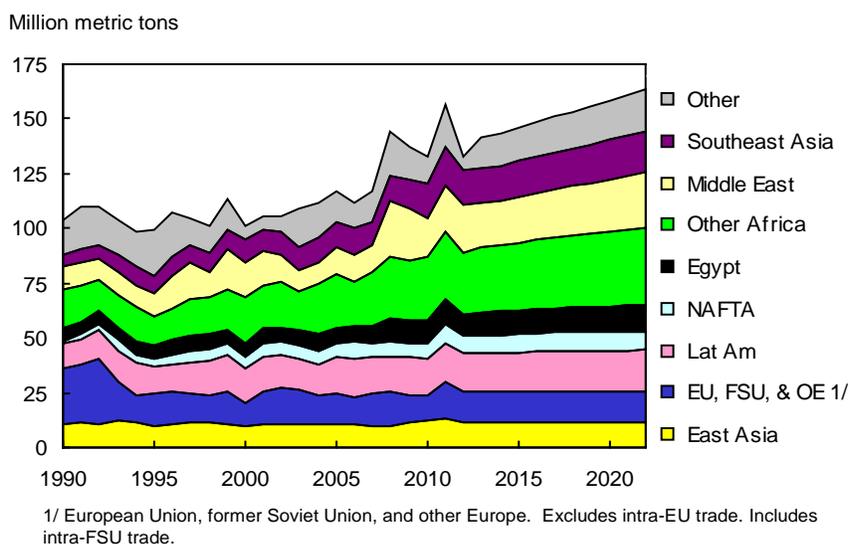
Global sorghum imports



World sorghum trade is projected to trend upward from around 6.5 million tons in 2012/13 to 8.7 million tons by 2022/23. U.S. sorghum exports to Mexico and Japan account for the bulk of world sorghum trade although Argentine exports are projected to gain market share.

- Mexico's sorghum imports are projected to more than double to 4.5 million tons in 2013/14 due to increased U.S. supplies. Many Mexican livestock producers have a slight preference for feeding sorghum, while U.S. livestock feeders increasingly prefer corn, thus facilitating U.S. sorghum shipments to Mexico. Historically, Mexico has often accounted for 30-40 percent of world sorghum imports, but its share is projected to rise to nearly 50 percent.
- Sorghum imports by Japan—the world's second-largest importer—trended slowly downward in the 15 years prior to 2008/09. After a small rebound in 2008/09, imports have been, and are projected to remain stable over the next decade.
- Imports by South American countries grow more rapidly than imports by any other market. Although these imports rise 27 percent, the volume increase is only 0.3 million tons.
- Sub-Saharan Africa is the only other major sorghum importing area where imports are projected to grow during the coming decade, and that projected growth is small.
- U.S. sorghum exports are projected to rebound in 2013 from low levels during the past several years, then to decline slightly for several years as U.S. supplies tighten. Exports remain flat throughout the remainder of the projections. Although exports remain well below historical highs, the United States continues to be the leading sorghum exporter.
- Argentina and Australia are expected to continue to be the world's second- and third-largest sorghum exporters during the coming decade. Argentina's exports are projected to rise 19 percent to 3.2 million tons, while Australia's exports are projected to remain slightly less than 1 million tons. Argentina's production of new sorghum varieties with lower tannin content enables it to gain a larger share of the international market. The primary sorghum markets for Argentina are Japan, Chile, Europe, and other countries in South America.

Global wheat imports

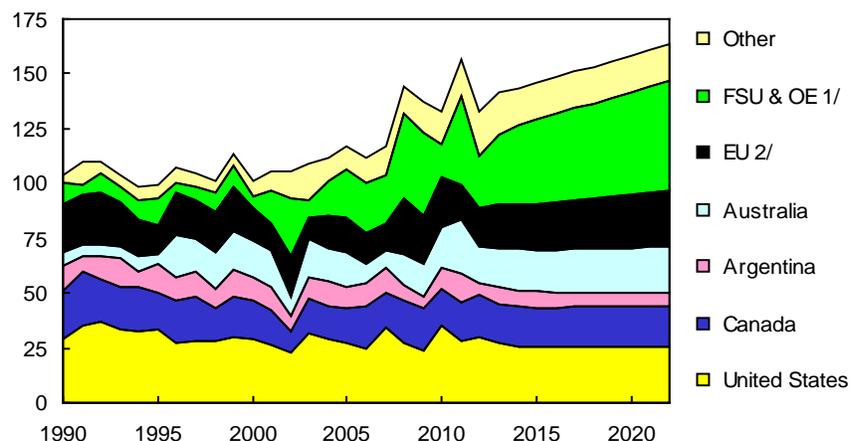


World wheat trade (including flour) is projected to expand by 22 million tons (16 percent) between 2013/14 and 2022/23, rising to nearly 164 million tons. Growth in wheat imports is concentrated in those developing countries where income and population gains drive increases in demand. The largest growth markets include Indonesia and other Asian countries, Egypt, Saudi Arabia, the 15 countries of the Economic Community of West African States, other Sub-Saharan Africa countries, and other countries in the North Africa and Middle East region.

- Globally, per capita use of wheat is projected to decline slightly. In many developing countries, almost no change in per capita wheat consumption is expected, but imports are projected to expand modestly because of population growth and limited potential to expand wheat production. As incomes rise in Indonesia, Vietnam, and some other Asian countries, consumers shift marginally from rice to wheat.
- Egypt remains the world's largest wheat-importing country with imports climbing to 12 million tons by 2022. Imports by Indonesia grow rapidly to 8.6 million tons and it replaces Brazil as the second-largest importing country.
- Imports by Vietnam and Bangladesh are both projected to rise rapidly, increasing a total of 2.1 million tons. Partially offsetting this increase are projected lower imports by Japan and South Korea.
- Imports by countries in Africa and the Middle East rise nearly 12 million tons and account for 53 percent of the total increase in world wheat trade. Saudi Arabia has adopted a policy to phase out wheat production by 2016 because of water scarcity concerns, and imports are projected to rise to 3.4 million tons by 2022/23.
- Historically, India has been a big wheat importer in some years and a big exporter in some other years. In the past two years, India has exported significant amounts of wheat, partially as a result of high price-support policies and excess government stocks. These policies are expected to continue in some form, although exports are projected to decline during the coming decade.

Global wheat exports

Million metric tons



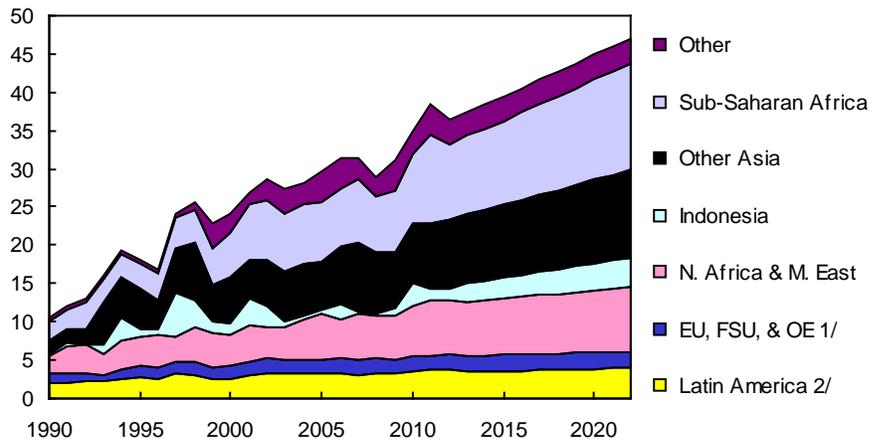
1/ Former Soviet Union and other Europe; prior to 1999, includes Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia, and Slovenia.
2/ Excludes intra-EU trade.

The traditional five largest wheat exporters (the United States, Australia, the EU, Argentina, and Canada) are projected to account for about 60 percent of world trade in 2022, compared with nearly 70 percent during the last decade. This decrease in share is mostly due to increased exports from the Black Sea area.

- U.S. wheat exports are projected to decline from nearly 30 million tons in 2012/13 to just over 25 million tons at the end of the projection period. U.S. exports are projected to account for less than 16 percent of global wheat trade at the end of the projection period, down from about 22 percent in the past 5 years.
- Canada's wheat area continues to decline slowly in response to increased global demand and more favorable returns for vegetable oils (especially rapeseed oil). As a result, little change is projected for Canadian wheat exports. Eliminating the Canadian Wheat Board's state trading monopoly is assumed to result in redirection of some Canada's exports to the United States due to logistical considerations.
- In Argentina, some of the area formerly planted to wheat shifts to barley in response to government policies and increased use of barley for double-cropping in crop rotation practices. Exports rebound in 2013 and 2014 after production shortfalls the previous 2 years, but then gradually decline during the rest of the projection period.
- The EU is the only traditional exporter whose market share is projected to increase. After dropping sharply in 2011 and 2012, EU wheat exports are projected to trend upward and reach 25 million tons by 2022, well above the levels of the last decade.
- The strong upward trend in wheat exports from Russia, Ukraine, and Kazakhstan was interrupted by droughts in 2010 and 2012. However, exports from these countries are expected to recover and rise more than 55 percent, climbing to nearly 50 million tons by 2022 and accounting for about 80 percent of the projected increase in world wheat trade. Increasing domestic feed use prevents even more rapid export growth. Although not explicitly reflected in the projections, continued year-to-year volatility in production and trade is likely because of the region's highly variable weather and yields.

Global rice imports

Million metric tons



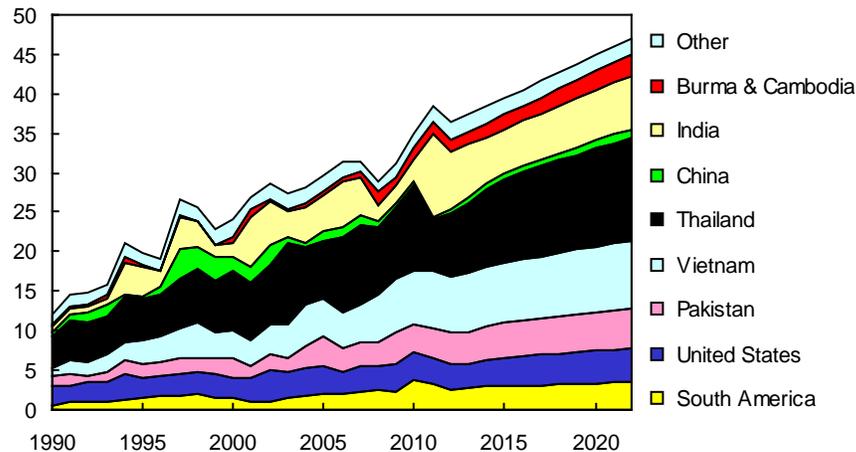
1/ European Union, former Soviet Union, and other Europe. 2/ Includes Mexico.

Global rice trade is projected to grow 2.5 percent per year from 2013 to 2022. In 2022, global rice trade reaches 47 million tons, 42 percent above the average of the last half decade. The main factors driving this expansion in trade are a steady growth in demand—largely due to population and income growth in developing countries—and the inability of several key importers to significantly boost production. Since the mid-1990s, world trade as a share of world consumption has risen above its 4-percent-average over the previous half century, to nearly 8 percent currently, and this growth is expected to continue.

- In Africa and the Middle East, strong demand growth is driven by rapidly expanding population and income, while production growth is limited. In North Africa and the Middle East, production is primarily limited by climate. In Sub-Saharan Africa, expanding production is constrained by infrastructure deficiencies and resource limitations. Altogether, the entire Africa and Middle East region accounts for nearly half of the increase in world rice trade during the projections. Africa accounts for most of this region's rising imports.
- Indonesia and the Philippines are projected to become the largest individual rice-importing countries. By the end of the projection period they import 4.0 and 2.5 million tons, respectively.
- China's rice imports jumped nearly 2 million tons between 2010 and 2012. In the projections, China's imports decline from record 2012 levels, but remain historically large as China imports lower-priced rice, primarily from Vietnam.
- Other major importing countries—Iran, Iraq, Malaysia, and Saudi Arabia—each take more than 1.3 million tons. These 4 countries have limited ability to expand rice production and are expected to account for more than 10 percent of the projected increase in global rice imports.
- Rice imports by other Asian countries account for most of the rest of the increase in world imports. Population growth and rising per capita incomes boost rice consumption and raise imports in this region.
- In the EU, Canada, and the United States, immigration continues to support slightly higher per capita consumption and modest import growth. In Mexico, higher incomes contribute to higher per capita consumption and moderate gains in imports.
- Imports by the FSU are projected to decline slowly as a result of strong production growth and a declining population that more than offset slowly rising per capita consumption.

Global rice exports

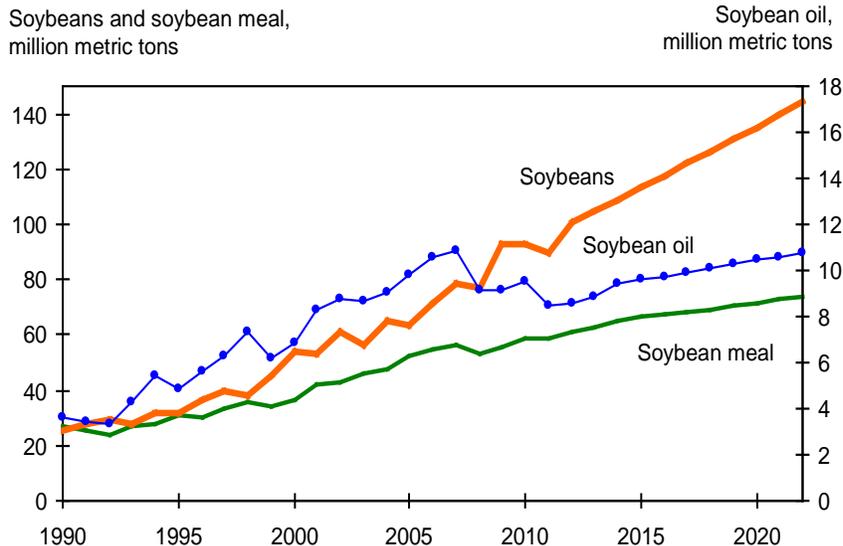
Million metric tons



Asia continues to supply most of the world's rice exports throughout the projection period.

- Rice exports from Thailand and Vietnam, typically the world's largest rice-exporting countries, account for more than 46 percent of world trade and for more than 58 percent of the growth in world exports in the coming decade. In Thailand, rice area and yields are projected to increase. Increasing production combined with a drawdown in large stocks enable exports to rise 4.2 million tons, to 13 million by 2022. Vietnam's export expansion is smaller, rising from 7.4 to 8.7 million tons. Per capita consumption in both countries declines slowly as incomes rise.
- India typically has been the third- or fourth-largest rice exporter since the mid-1990s, but its export levels have been volatile, primarily due to Government policies and fluctuating stock levels. In September 2011, the Government eased an export ban on non-basmati rice and exports jumped from less than 3 million tons to more than 10 million tons, making India the number one exporter in 2012. Although projected exports retreat from that peak, they remain large for the next several years as the country's large stocks are drawn down.
- Pakistan and the United States have each been exporting between 3 and 4 million tons in recent years. Pakistan has expanded its rice area, and rice production and exports are projected to climb to 5 million tons, establishing the country as the fourth largest exporter.
- Modest expansion in U.S. rice exports is attributable to a slight area expansion after 2013, continued yield growth, and slow growth in domestic use. The U.S. export share is projected to remain about 9 percent during the projections.
- Rice exports from China, the sixth-largest rice-exporting country, have declined in recent years but are projected to begin rising again and to reach 1.1 million tons by 2022, about double the level shipped in recent years. Little change in production is expected. Higher yields are expected to offset declining area as China allows the use of genetically modified rice. Reductions in per capita consumption, a result of continued diet diversification resulting from higher incomes, are expected to offset population growth. China's rice stocks are projected to remain large during the projection period.
- Australia's exports have recovered from the extremely low, drought-induced, levels shipped during much of the past decade. Exports are projected to stabilize at about 0.5 million tons.

Global exports: Soybeans, soybean meal, and soybean oil

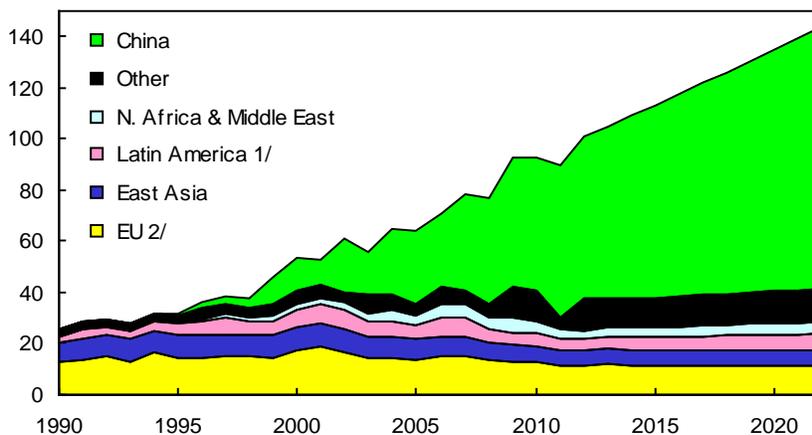


Economic growth and population increases in developing countries are projected to boost demand for vegetable oils for food consumption and for protein meals used in livestock production. Vegetable oil used for biodiesel production also is projected to increase. With demand for vegetable oils increasing at a faster rate than for protein meals, prices rise more rapidly for vegetable oils than for oilseeds and protein meals, particularly for rapeseed oil compared with rapeseed meal.

- Many countries with limited opportunities to expand oilseed production, such as China and some countries in North Africa, the Middle East, and South Asia, have invested heavily in crushing capacity. As a result, their import demand for oilseeds has grown rapidly, and this growth is projected to continue. During the next decade, global soybean trade is projected to increase by 37 percent, soybean oil by 21 percent, and soybean meal by 19 percent.
- In China, per capita income is projected to continue rising rapidly, thereby expanding consumer demand for livestock products and vegetable oils. Feed rations are expected to include an increasing percentage of protein meal to improve rates of weight gain for meat-producing animals. China mostly will import oilseeds for crushing rather than large amounts of oilseed meals and oils. That preference affects the composition of world trade by raising global import demand for oilseeds rather than for oilseed products.
- Argentina, Brazil, and the United States account for 87 percent of the world's aggregate exports of soybeans, soybean meal, and soybean oil during the coming decade. Brazil's share of world exports of soybeans and soybean products climbs to more than 36 percent, as area expansion and yield growth boost production faster than in other exporting countries. In Argentina, uncertainties about grain policies cause farmers to keep more land in soybean production. Also, some pasture land is shifted to soybean cultivation. Argentina's share of world exports of soybeans and soybean products rises slightly to about 27 percent.
- The U.S. share of global exports of soybeans and soybean products declines from about 29 percent to 24.5 percent by 2022.
- The EU continues expanding biodiesel production using rapeseed oil as a primary feedstock. Rapeseed area increases, particularly early in the projection period, but imports of rapeseed and rapeseed oil also rise. EU imports of soybean meal and soybean oil are projected to increase.

Global soybean imports

Million metric tons



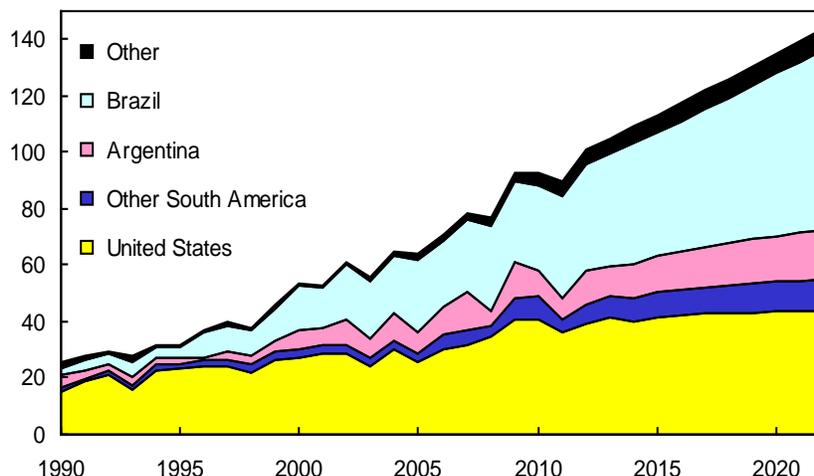
1/ Includes Mexico. 2/ Excludes intra-EU trade.

World soybean trade is projected to rise rapidly during the next 10 years, but at a slower pace than in recent years, climbing nearly 39 million tons (37 percent), to 144 million tons.

- China's soybean imports have risen sharply and now account for more than half of world trade. Over the coming decade, China will face policy decisions regarding the tradeoffs between producing and importing corn and soybeans. The projections assume that Chinese policies will pursue increasing corn production and letting soybean imports increase to fill the shortfall in domestic production. China's modern, efficient, but underutilized oilseed crushing capacity is expected to drive strong gains in soybean imports. Thus, China's soybean imports are projected to rise 52 percent to 103 million tons in 2022/23 and to account for more than 90 percent of the projected growth in global soybean imports. Soybean oil will be used domestically, but some surplus soybean meal will be exported to other Asian countries.
- EU soybean imports declined over the past decade due to decreases in internal grain prices, increases in grain and rapeseed meal feeding, and rising imports of soybean meal. These trends are projected to continue, although at a slower pace, with soybean imports remaining mostly unchanged.
- Imports of soybeans and soybean meal by East Asia (Japan, South Korea, and Taiwan) are influenced by a continuing shift from importing feedstuffs to importing meat and other livestock products. As a result, this region's projected expansion in soybean imports is small. Small increases in soybean meal imports support slowly rising meat production in this region.
- Mexico's soybean imports are projected to increase 21 percent to 4.5 million tons. These imports will support the production of soybean meal for the Mexican poultry and pork industries, and of soybean oil for domestic food consumption.
- Egypt is projected to increase soybean imports in an effort to improve feed rations and to meet increased per capita demand for vegetable oil consumption. Many other countries in the North Africa and Middle East region also have a limited ability to expand their soybean production, and so they increase imports to fill their growing feed and food needs.

Global soybean exports

Million metric tons

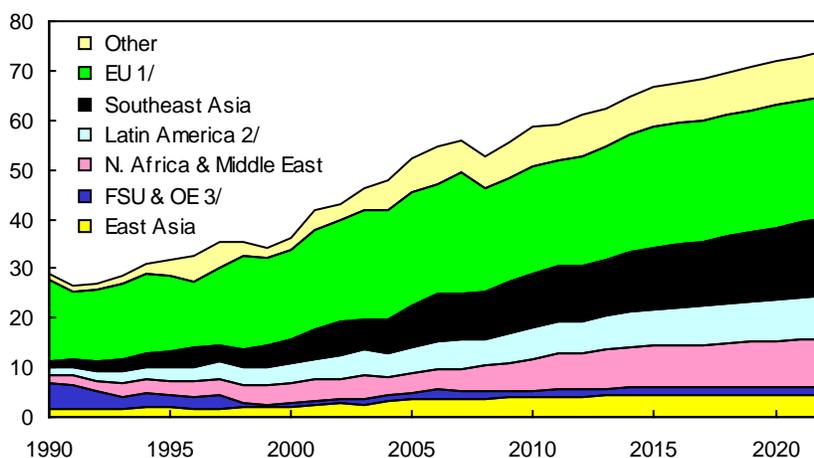


The three leading soybean exporters—the United States, Brazil, and Argentina—accounted for slightly more than 90 percent of world trade prior to 2009/10. Since then, exports from Uruguay, Paraguay, Bolivia, Ukraine, and a few other countries have increased—a trend that is expected to continue during the coming decade. As a result, the share held by the traditional exporters slips to 87 percent.

- Brazilian soybean exports are projected to rise 24.5 million tons (62 percent) to 63.8 million tons during the 2013/14 to 2022/23 projection period, enabling the country to strengthen its position as the world’s leading exporter of soybeans and soybean products. As world oilseed prices rise relative to grain prices, soybeans remain more profitable than other crops in most areas of Brazil. With increasing soybean plantings in the Cerrado region and expansion extending into the “Amazon Legal” region, the increase in area planted to soybeans is projected to average just above 2 percent per year during the coming decade.
- Argentina’s export tax rates are higher for soybeans than for soybean products, a policy that favors domestic crushing of whole seeds and exporting of the resulting products. However, in response to world demand for soybeans for crushing, Argentina’s soybean exports have risen sharply and are projected to continue doing so, rising about 60 percent to more than 17 million tons by 2022/23. Most of the soybeans exported by Argentina go to China.
- Other South American countries, principally Uruguay, Paraguay, and Bolivia, respond to higher oilseed prices by expanding the area planted to soybeans. Exports by these countries increase 46 percent, to more than 11 million tons.
- Although Ukraine’s soybean exports are small, the country is expected to respond to higher international prices for oilseeds by increasing production of rapeseed and soybeans. Ukraine soybean exports are projected to rise 65 percent, to 3.2 million tons by 2022/23.

Global soybean meal imports

Million metric tons



1/ Excludes intra-EU trade.

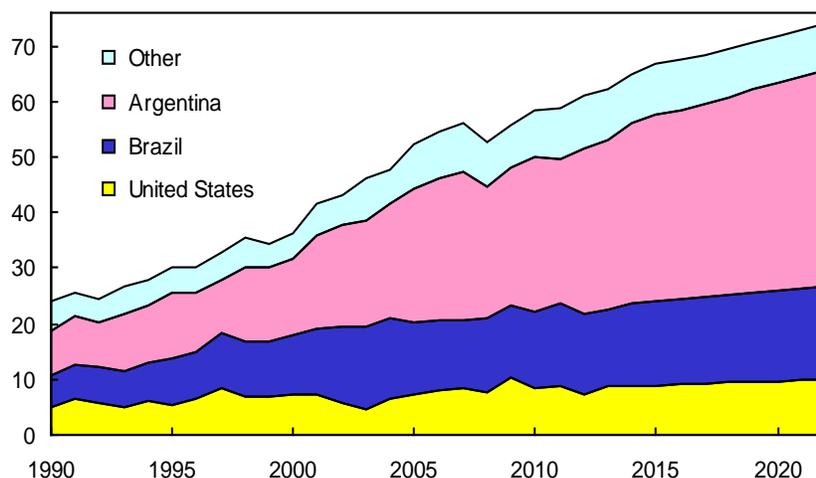
2/ Includes Mexico. 3/ Former Soviet Union and other Europe; prior to 1999, includes Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia, and Slovenia.

World soybean meal trade is projected to climb by more than 11 million tons (19 percent), to 74 million tons by 2022/23. In a number of countries with rising middle-income populations, soybean meal use is boosted by continued growth in the demand for livestock products, limited capability to increase domestic oilseed production, and low world prices for protein meals relative to feed grains. Low soybean meal import prices provide incentives to use a higher percentage of soybean meal in feed rations.

- The EU remains the world's largest soybean-meal importer throughout the projections, despite increased domestic feeding of grains and rapeseed meal. Although abundant supplies of low-cost rapeseed meal are expected to be available as a result of expanded EU biodiesel production, there are nutritional considerations that limit how much rapeseed meal can be incorporated into livestock rations. As a result, growth in EU soybean meal imports is expected to continue.
- The regions of Southeast Asia, Latin America, North Africa, and the Middle East become larger importers of soybean meal due to increasing demand for livestock feed and low oilseed meal prices. Imports by Southeast Asia, especially Vietnam, climb rapidly and account for 35 percent of the projected increase in world soybean meal trade. Imports by countries in North Africa and the Middle East are projected to rise 1.6 million tons, and account for 14 percent of the increase in world trade. Soybean meal imports by Latin American countries other than Argentina and Brazil increase by 2 million tons, with much of that trade between countries within the region.
- Strong growth in soybean meal imports is also projected for many other countries. Mexico's growing demand for protein feed is expected to boost imports. Russia's rising soybean meal imports are linked to livestock production at larger, more modern facilities. Although China's projected growth rate for soybean meal use is one of the highest in the world, imports are small. Most of China's soybean meal will be supplied by domestic crushing of domestically produced and imported soybeans.

Global soybean meal exports

Million metric tons

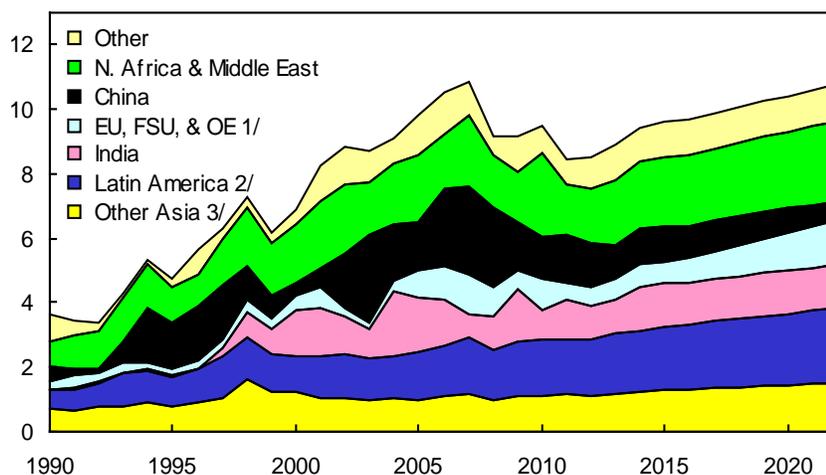


Argentina, Brazil, and the United States remain the three largest exporters of soybean meal. Together, their share of world exports rises slightly, to nearly 90 percent over the next 10 years. Argentina, the world's largest soybean meal exporter, increases its share of the world market from around 46 percent in recent years to nearly 53 percent in 2022/23.

- Argentina imposes higher export taxes on soybeans than on soybean products. That policy has provided an incentive for the country to develop a large oilseed-crushing capacity. With Argentina's low soybean production costs and its export incentives for soybean products, soybean meal exports are projected to continue their robust growth.
- In Brazil, strong growth in domestic meal consumption due to the rapid expansion of poultry and pork production limits increases in soybean meal exports. Also, Brazil's soybean-crushing capacity is not expected to grow as quickly as in the past due to strong trade competition from Argentina. Brazil's share of world soybean meal exports remains around 23 percent.
- U.S. soybean meal exports gradually increase by about 1 million tons during the next 10 years, reaching 10 million tons by 2022/23. Meanwhile, the U.S. share of world soybean meal exports declines slightly.
- India's soybean meal exports decline as domestic use strengthens and export competition from South America intensifies. Exports fall from more than 4 million tons in most recent years, to 2.3 million in 2022, as rapidly increasing poultry, egg, and milk production use more of India's domestic soybean meal production.
- The EU continues to be a small but steady exporter of soybean meal to Russia and other East European countries, where livestock production is expected to increase significantly.

Global soybean oil imports

Million metric tons



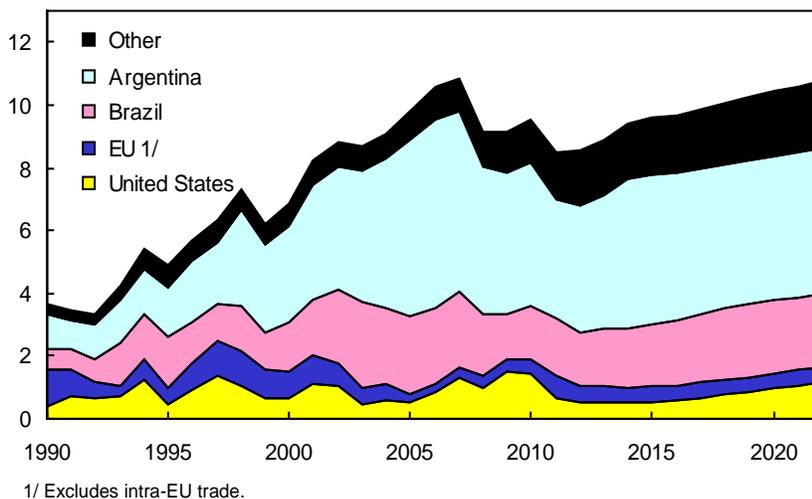
1/ European Union, former Soviet Union, and other Europe.
2/ Includes Mexico. 3/ Asia excluding India and China.

World soybean oil imports climb 1.9 million tons (21 percent) to 10.8 million tons over the 2013/14 to 2022/23 projection period, bolstered by rising food and industrial use. China and India are the two countries that currently import the most soybean oil. Growth in world soybean oil trade will be constrained by competition with palm oil, which is the leading vegetable oil traded internationally.

- India is projected to replace China as the world's largest soybean oil importing country. In the projections, India's soybean oil imports climb 28 percent to 1.4 million tons in 2022/23. Factors contributing to the continued growth of India's soybean oil imports include burgeoning demand for vegetable oils and limited area for expanding domestic oilseed area. Low yields, associated with excessive monsoon rainfall and low input use, also inhibit growth of oilseed production.
- In 2008, in response to high domestic food price inflation and high world prices, India reduced tariffs on crude edible oils, which stood at 40 percent for soybean oil and 75-85 percent for other oils, to zero. For the projections, it is assumed that India's tariffs on crude soybean oil and other vegetable oils will rise moderately, but remain well below pre-2008 levels.
- With a rapid increase in China's soybean imports for domestic crushing during the coming decade, the country's soybean oil imports are projected to decline about 50 percent, to 0.6 million tons. As a result, China will be replaced by India as the world's leading soybean oil importer.
- Income and population growth in Latin America, North Africa, and the Middle East contribute to gains in soybean oil demand and imports, although rising international prices for soybean oil will temper consumption. Nevertheless, the North Africa and Middle East region is projected to become the largest importing region, followed by Latin America.

Global soybean oil exports

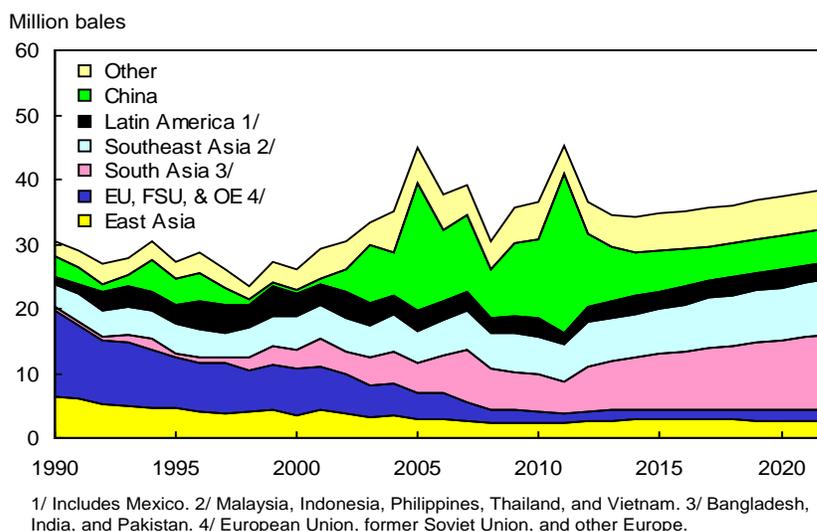
Million metric tons



Argentina and Brazil are by far the world's largest soybean oil exporters, and their combined share of world soybean oil exports is projected to remain above 64 percent during the coming decade.

- Soybean oil exports from Argentina—the world's largest exporter—are projected to climb modestly to 4.6 million tons by 2022/23. Argentina's strength as a soybean oil exporter reflects the country's large crushing capacity, its small domestic market for soybean oil, and an export tax structure that favors exports of soybean products rather than soybeans. Gains in Argentine soybean production due to extensive double cropping, further adjustments in crop-pasture rotations, and the expansion onto marginal lands in the northwest part of the country, also have contributed to increased soybean production and crushing. Argentina's soybean oil exports declined during the last half decade due to weather-related production shortfalls and increased biodiesel production. Although soybean oil exports have begun to rise again, slow growth is projected as more soybean oil will be used to produce biodiesel.
- Brazil's projected increase in soybean oil exports accounts for much of the rest of the global increase in soybean oil trade. Brazil also is projected to use more soybean oil for biodiesel production, but the expansion of soybean production into new areas of cultivation is expected to enable the country to increase soybean oil exports.
- After falling sharply during the last 2 years, U.S. soybean oil exports are projected to begin climbing once again. By 2022, exports double, rising to 1.2 million tons, allowing the United States to remain the world's third-largest soybean oil exporter. U.S. soybean oil used for biodiesel production also increases steadily. U.S. imports of canola oil from Canada and palm oil from Southeast Asia are projected to continue to grow strongly, and augment the U.S. edible oil supply.
- In the EU, as in Argentina and the United States, exportable supplies of vegetable oils are limited by the growth in biodiesel production.

Global cotton imports



World cotton trade is projected to trend upward at 1.2 percent a year between 2013 and 2022, but does not surpass the 2005 record. Significant geographical shifts in mill use and cotton trade are expected during the next decade as a result of recent changes in China's cotton policy (see box).

- China's textile industry is expected to stagnate during the coming years and cotton imports are projected to decline sharply as a result of Chinese policies. The projected 3-million-bale decline in Chinese imports between 2013 and 2022 is more than offset by increased imports by Pakistan, Bangladesh, and other Asian countries. Asia's share of world cotton imports peaked at 84 percent in 2011/12, largely due to record Chinese imports. Asia's share is projected to retreat to just above 70 for most of the coming decade.
- As textile production and cotton imports shift from China to other countries, Pakistan, Bangladesh, and Vietnam, become major beneficiaries. Bangladesh became the world's second-largest cotton importer during the last decade and is projected to replace China as the world's largest importer midway through the projection period.
- Pakistan has moved up to become a major importer in recent years. Even though new *Bacillus thuringiensis* (*Bt*) cotton varieties specific to Pakistan's cotton growing conditions stimulate additional production, cotton imports are projected to increase rapidly and to surpass Turkish and Chinese imports by 2022.
- Turkey's textile industry benefited from favorable access to the EU until the end of the Multifiber Arrangement (MFA) quotas gave lower cost competitors more favorable access to EU markets. Turkey's cotton imports have stagnated since then. In the projections, Turkey's imports increase over the next several years as the country's textile trade gains some benefits from China's decline. However, Turkey's cotton imports flatten during the last half of the projection period.
- Other textile producing countries, with high wages and other production costs—such as Japan, Taiwan, South Korea, and countries in the EU—are not expected to gain appreciably from the shift of textile production out of China.

China's Cotton Policy: Global Impacts

China's cotton policy has changed significantly since 2010, with important consequences for global cotton market. In March 2011, China announced a national floor price for cotton for the first time in more than a decade, and that price was increased in 2012, despite a steep decline in world cotton prices. One result has been a large premium between cotton prices in China compared with the rest of the world, which is shifting world cotton consumption from China to other countries such as Pakistan, Bangladesh, India, and Vietnam.

Three trends are behind the evolution of China's cotton policy and its impact. One is China's growing support for domestic grain producers since 2004, which has helped make grain production more attractive to farmers in China. Another is China's rising wages, which further places cotton—a relatively labor-intensive crop in China—at a disadvantage with respect to grains. The third trend is a downward shift in the price of cotton outside of China relative to other commodities.

China has been increasing its support to farmers since 2004 in part to help redress a growing gap between rural and urban incomes. A strong upward trend in world food commodity prices that began in 2002 increased interest by China's policy makers to support domestic grain production. In 2004, China introduced floor prices for rice, and later extended the policy to wheat and corn. China also introduced production subsidies for grains, recently expanding payments for mechanization and to offset rising fuel costs. Cotton producers have received small subsidies for using superior seed, but have not received the other extensive subsidies.

Increased labor costs also have favored a shift from cotton to grain production. While China's grain production has become more mechanized, cotton production in China is still relatively labor intensive. Moreover, the country's agricultural labor force has declined as workers migrated to higher paying jobs in urban areas.

The shift in China's policy followed a nearly-unprecedented spike in cotton prices in 2010. Reserve stocks held by China's government were virtually exhausted in auctions attempting to limit domestic price increases. Setting a relatively high cotton support price in 2011 protected farmers from a severe contraction in prices, restored expected cotton prices to a 10-to-1 ratio with respect to wheat, and helped to ensure domestic supplies for the textile industry (albeit at inflated prices) and to rebuild national reserve stocks. China's reserve stock management authority also is believed to have purchased nearly 4.6 million bales of foreign cotton for the reserve in 2011/12. Authorities also purchased 45 percent of the domestic crop, adding 18.4 million bales (equal to 18 percent of world consumption) to the reserve.

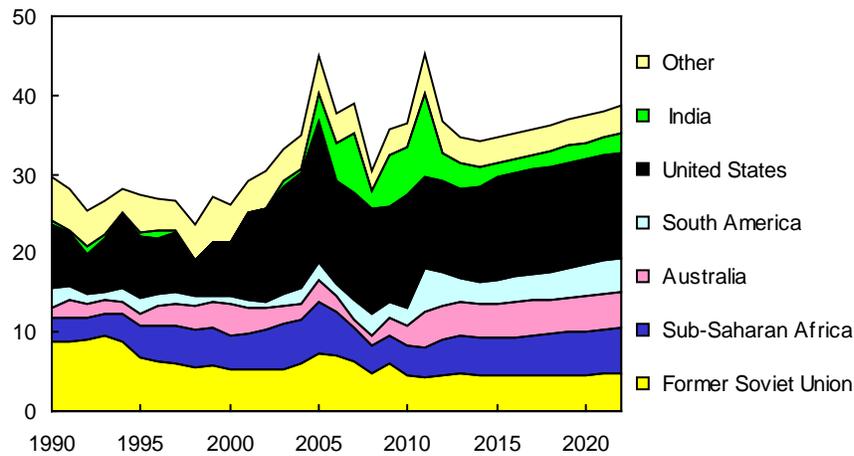
Commensurate with rising production costs, China raised its floor prices for grains and cotton in 2012. But world cotton prices fell to the lowest level since the 2010/11 spike. The price premium for cotton within China relative to the rest of the world rose to 50-70 percent during the first months of the 2012/13 marketing year, compared with the 15-40 percent premium that prevailed during 2005-2010. Lacking access to cotton at competitive prices, China's textile industry increased yarn imports from India, which in turn, sparked increased cotton consumption in India.

China's commitment to sustain its farmers' incomes suggests continued strength in domestic grain prices and subsidies. Maintaining domestic cotton production through price policies under these circumstances suggests continued problems for China's textile industry. China's continued accumulation of cotton in its reserve (an additional 5.2 million tons during the first 5 months of 2012/13) highlights the potential strains on storage space and the potential negative impact on world prices that would result with a reversal of China's reserve stocks policies.

Over the next decade, China's cotton production will become more efficient as the share of output in the western province of Xinjiang grows and Xinjiang's production mechanization continues. However, China's share of world cotton consumption has declined in recent years and is projected to continue the downward trend. The shares of world consumption of other major textile producers are projected to increase.

Global cotton exports

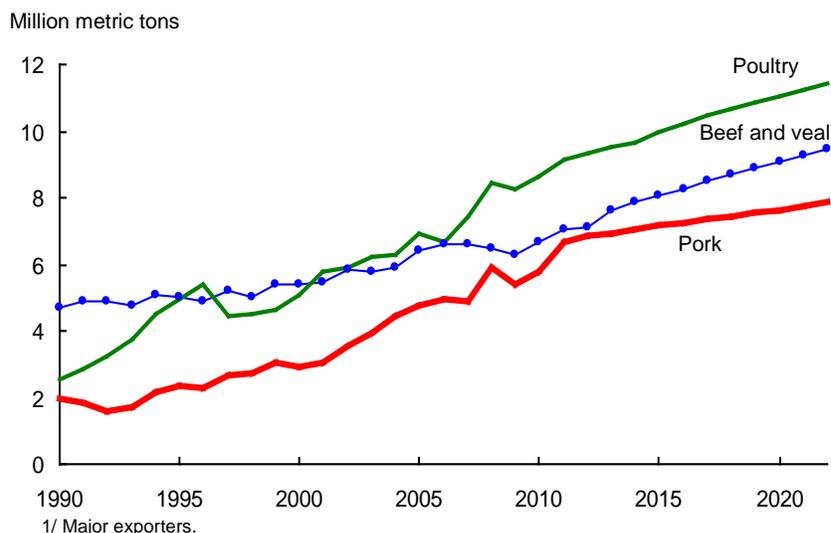
Million bales



Globalization is expected to continue to move raw cotton production to countries with favorable resource endowments and technology. Traditional producers with large land bases suitable for cotton production continue to benefit from post-MFA trade patterns, including the United States, Brazil, and Sub-Saharan Africa, as well as the traditional low-cost producing countries of India and Pakistan. The importance of technology has been highlighted by the impact of India's rapid adoption of genetically modified cotton, nearly all *Bt* cotton.

- The United States is the world's leading cotton exporter throughout the projections. U.S. exports rise slightly to 13.3 million bales by 2022/23. The U.S. share of world exports rises slightly over the next several years but remains slightly below the recent historical average, and declines during the last half of the projection period.
- Brazil's cotton exports are projected to increase by 40 percent between 2013/14 and 2022/23 as the area planted to cotton continues a long-term upward trend. Exports from Brazil rise 1.2 million bales, more than from any other country or region.
- Exports from the 15 countries of the Economic Community of West African States declined during the post-MFA period but are projected to renew growth during the coming decade due to improvements in technical and financial infrastructure, and the adoption of *Bt* cotton. The region's exports are projected to rise 16 percent during the next 10 years and to account for 12 percent of world trade growth. Exports from the other countries in Sub-Saharan Africa declined after 2005 but are also projected to increase in the future.
- Government policies in Central Asian countries of the FSU promoting investment in textiles have contributed to more exports of textile products rather than to exports of raw cotton. As a result, the region's cotton exports change very little.
- Improved cotton yields in India, largely due to the adoption of *Bt* cotton, have raised India's production and exports in recent years. Yield growth is projected to continue as the gains from *Bt* cotton are further enhanced by improved cultivation practices. The increase in cotton output is expected to enable India to increase textile production with domestically-produced cotton. As a result, projected cotton exports are well below levels of the past half-decade.

Meat exports 1/



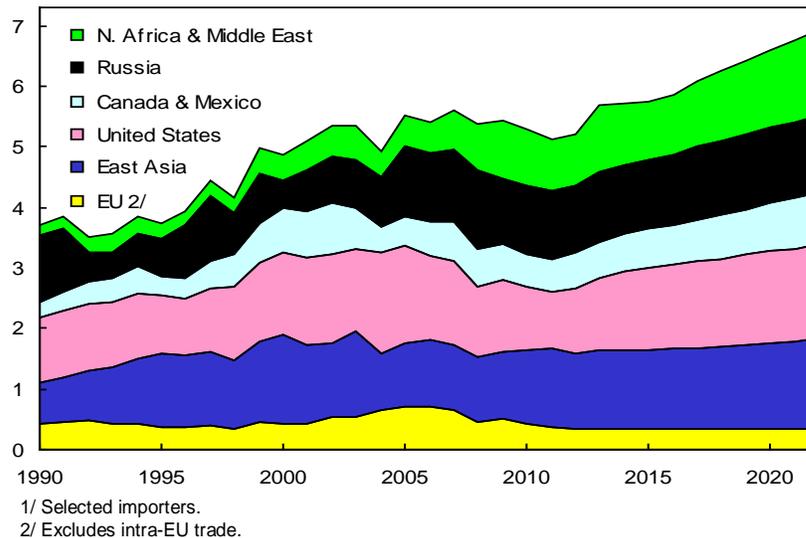
Global per capita meat consumption continues to increase with poultry consumption rising faster than pork or beef consumption. Growth in world meat consumption is projected to increase about 1.8 percent per year during 2013-2022 and meat shipments from major exporters rise nearly 2 percent per year. The projected growth rates of exports from major exporters of beef, pork, and poultry meat are 2.4, 1.4, and 2.0 percent per year, respectively. During this period, exports rise 1.8 million tons for beef, 0.9 million for pork, and 1.9 million for poultry.

World meat trade increases 19 percent in the projections, driven primarily by rising per capita incomes and population growth in developing countries. However, Russia's aggregate meat imports decline, reflecting policies that stimulate domestic meat production and curb imports.

- Beef exports from Asia, mostly from India, increased sharply after 2009. Developing countries' demand for India's lower priced beef is projected to continue rising rapidly. India's rising exports account for over 40 percent of the increase in world beef exports.
- Australia has generally been the world's second-largest beef exporter, after Brazil. Although its beef herd is in a rebuilding phase, production and exports are projected to grow slowly. In the projections, Australia's exports are surpassed by those from India and the United States, and Australia drops to become the fourth-largest exporter.
- Canada's cow herd contracted significantly during 2006-10 but is now in a rebuilding phase. As a result, Canada's net beef exports are projected to rise slowly.
- Argentina's beef herd is recovering after a sharp contraction following 2005 export restrictions, and exports are expected to rise later in the projection period.
- EU beef exports are projected to decline slightly in the next 10 years.
- Exports from Brazil's expanding pork sector are expected to be competitive in price-sensitive markets such as Russia, China, and Hong Kong. Brazil is expected to continue to be the largest exporter of poultry products due to a combination of competitive production costs and export prices.

Beef imports 1/

Million metric tons

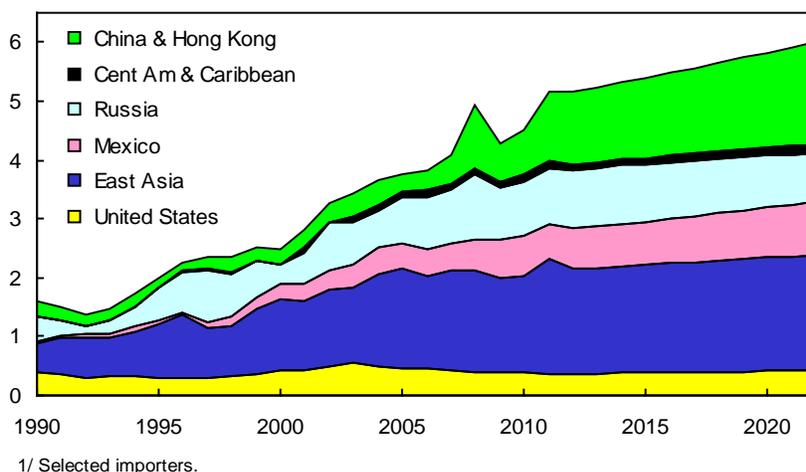


Between 2013 and 2022, imports by major beef importing countries are projected to increase nearly 1.9 million tons (30 percent) and reach 8.1 million tons. Exports of lower priced beef from India and Brazil to a number of low- and middle-income countries account for nearly two-thirds of the projected increase in world beef trade.

- During the next 10 years, Russian beef imports are projected to fluctuate around 1.1 million tons as rising consumer demand is offset by expanding Russian beef production. Russia does remain a market for EU and South American beef exports.
- Imports of grain-fed beef by higher-income countries are projected to rise steadily. U.S. beef exports to these countries are constrained in the early half of the projections as U.S. production recovers. During the last half of the projections, U.S. beef exports rise more rapidly as production expands and exports become more competitive. As more beef demand in East Asian markets is met by U.S. grain-fed beef, exports of grass-fed beef to those markets from Australia and New Zealand are likely to decline, diverting more grass-fed product to the United States.
- U.S. beef imports, primarily of grass-fed, lean beef from Australia and New Zealand for use in ground beef and processed products, rise during the projection period. The United States is projected to be the world's largest beef importer and accounts for 20 percent of the increase in world imports.
- The Middle East, with a relatively fast growing population, and Asia, with high income growth rates, are projected to be growing markets for beef. Together, the two regions account for 58 percent of the increase in world beef trade through 2022.
- Strong growth in Mexican beef imports is projected to resume over the next several years. Much of Mexico's imports consist of higher valued, grain-fed beef from the United States.

Pork imports 1/

Million metric tons

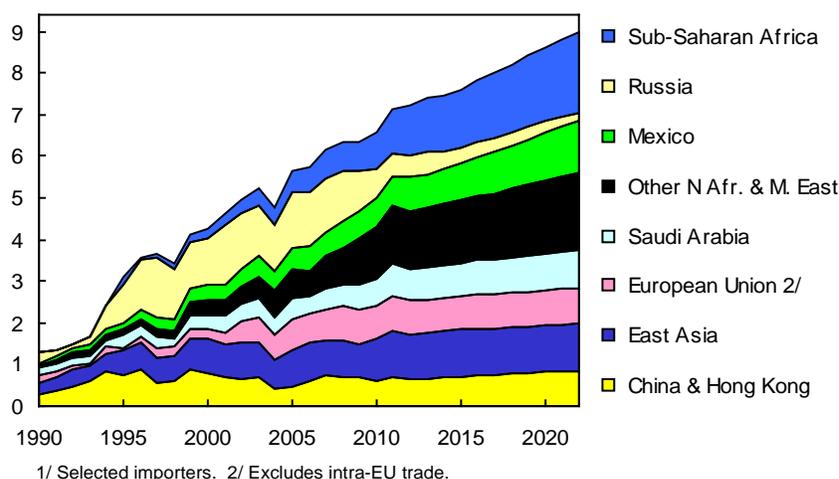


After a sharp 2009 drop in world pork imports that was associated with the global recession, global imports recovered in 2010 and 2011. In the projections for 2013 to 2022, world pork imports are expected to continue to rise, and to increase by 0.84 million tons (16 percent).

- Japan is projected to remain the world's largest pork importer during the coming decade. Nonetheless, with Japan's aging and declining population, its imports are not projected to rise significantly.
- Russia's pork imports are projected to decline steadily during the next 10 years in response to the country's policies to stimulate domestic meat production and reduce reliance on imports. By 2022, Russian pork imports are projected to decline nearly 20 percent to about 0.8 million tons.
- In the projections, imports by China and Mexico each surpass those of Russia. Since 2009 China's pork imports have risen sharply and are projected to continue rising steadily. Although China continues to export about 0.2 million tons a year, its imports rise to 1.2 million tons a year by 2022.
- Mexican pork imports increase the most of any country in the world, rising 0.22 million tons (32 percent) between 2013 and 2022. Increases in income and population are the primary drivers of Mexico's increasing demand for pork. Mexico accounts for about 26 percent of the growth in global pork imports during the coming decade.
- Some higher income countries in East Asia increase pork imports to satisfy demand for selected cuts of pork. Combined, Hong Kong, Japan, and South Korea account for 28 percent of the increase in world pork imports during the projection period.
- Imports by the Central America and Caribbean region grow more rapidly on a percentage basis than imports by any other country or region, although from a small base. Although income growth and an expanding population boost demand, the region's need to import most feedstuffs limits growth in pork production.

Poultry imports 1/

Million metric tons



Poultry meat imports by major importers are projected to increase by 1.6 million tons (21 percent) during the projections period, reaching 9 million tons by 2022. Strong import growth is projected for much of the world except, most notably, for Russia (where policies constrain imports), and Japan.

- Poultry imports by Africa and the Middle East currently account for about 45 percent of imports by the major importers. Income and population growth boosts demand in the projections. In addition, ongoing animal-disease concerns in a number of countries are expected to slow growth in production and to increase demand for imports. As a result, the region's imports grow more than the rest of the world combined and by 2022 account for 52 percent of world imports. The Middle East accounts for more than half of the region's projected increase in imports. Imports by the Economic Community of West African States grow much more rapidly in percentage terms, but from a small base.
- Rising consumer incomes increase poultry demand and imports in Mexico and in the Central America and Caribbean region. Poultry products remain less expensive than beef or pork, further stimulating demand. Mexico's domestic poultry production continues to increase during the projection period, but rises at a slower rate than consumption, with the result that imports rise by 0.41 million tons (50 percent).
- Russia's poultry imports are projected to decline steadily. The projections assume that Russian policies will limit poultry imports to stimulate domestic production. High poultry prices and slower income growth inhibit growth in per capita poultry consumption.
- China's rising consumption of poultry meat is met by expanding domestic production. The country's growth in poultry exports slightly exceeds the increase in imports.
- Fully cooked products are projected to account for most poultry exports from China and Thailand. With higher unit costs most of these products are marketed to higher income countries in Asia, Europe, and the Middle East. In addition, Thailand's exports to the EU are expected to rise because trade to that market in uncooked chicken is being reopened.

Table 4. Coarse grains trade long-term projections

| | 2011/12 | 2012/13 | 2013/14 | 2014/15 | 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 |
|-------------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| <i>Imports, million metric tons</i> | | | | | | | | | | | | |
| Importers | | | | | | | | | | | | |
| Former Soviet Union ¹ | 1.1 | 1.1 | 1.2 | 1.4 | 1.5 | 1.6 | 1.6 | 1.7 | 1.8 | 1.9 | 1.9 | 2.0 |
| Other Europe | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.9 | 0.9 | 0.9 | 0.9 | 0.9 | 0.9 |
| European Union ² | 7.1 | 7.1 | 7.1 | 6.7 | 6.3 | 6.4 | 6.4 | 6.4 | 6.4 | 6.5 | 6.6 | 6.7 |
| Middle East | 22.4 | 19.9 | 21.9 | 22.9 | 23.4 | 23.7 | 24.1 | 24.5 | 24.8 | 25.1 | 25.3 | 25.6 |
| North Africa | 14.7 | 13.0 | 14.5 | 15.2 | 15.6 | 15.7 | 15.9 | 16.2 | 16.4 | 16.5 | 16.7 | 16.9 |
| Sub-Saharan Africa ³ | 2.5 | 2.6 | 2.8 | 2.9 | 3.0 | 3.1 | 3.2 | 3.3 | 3.4 | 3.5 | 3.6 | 3.7 |
| Japan | 17.7 | 17.9 | 18.3 | 18.4 | 18.5 | 18.6 | 18.6 | 18.6 | 18.7 | 18.7 | 18.7 | 18.7 |
| South Korea | 7.7 | 8.1 | 8.5 | 8.8 | 9.0 | 9.0 | 9.2 | 9.4 | 9.5 | 9.7 | 9.8 | 9.9 |
| Taiwan | 4.4 | 4.5 | 4.5 | 4.6 | 4.6 | 4.6 | 4.6 | 4.7 | 4.7 | 4.7 | 4.7 | 4.8 |
| China | 7.9 | 4.5 | 9.3 | 10.1 | 10.7 | 11.9 | 13.7 | 15.3 | 17.0 | 18.8 | 20.9 | 23.0 |
| Other Asia & Oceania | 6.5 | 6.3 | 7.6 | 8.7 | 8.9 | 9.1 | 9.5 | 9.9 | 10.3 | 10.7 | 11.0 | 11.4 |
| Mexico | 12.7 | 11.4 | 15.0 | 15.5 | 16.5 | 17.0 | 17.7 | 18.3 | 19.0 | 19.8 | 20.6 | 21.4 |
| Central America & Caribbean | 5.2 | 5.4 | 5.5 | 5.5 | 5.6 | 5.7 | 5.7 | 5.8 | 5.8 | 5.9 | 6.0 | 6.0 |
| Brazil | 1.1 | 1.1 | 1.1 | 1.1 | 1.1 | 1.1 | 1.1 | 1.1 | 1.1 | 1.1 | 1.2 | 1.2 |
| Other South America | 10.6 | 10.2 | 11.0 | 11.2 | 11.3 | 11.5 | 11.6 | 11.7 | 11.8 | 11.8 | 11.8 | 11.8 |
| Other foreign ⁴ | 13.7 | -2.3 | 4.2 | 4.7 | 4.9 | 4.9 | 4.9 | 5.0 | 5.1 | 5.1 | 5.2 | 5.3 |
| United States | 3.1 | 4.9 | 3.0 | 3.0 | 3.0 | 3.0 | 3.0 | 3.0 | 3.0 | 3.0 | 3.0 | 3.0 |
| Total trade | 139.3 | 116.4 | 136.1 | 141.7 | 144.7 | 147.6 | 151.6 | 155.7 | 159.8 | 163.6 | 167.9 | 172.4 |
| <i>Exports, million metric tons</i> | | | | | | | | | | | | |
| Exporters | | | | | | | | | | | | |
| European Union ² | 6.5 | 4.0 | 4.8 | 5.2 | 5.6 | 5.8 | 5.6 | 5.6 | 5.7 | 5.8 | 5.9 | 5.8 |
| China | 0.1 | 0.3 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 |
| Argentina | 21.9 | 25.1 | 25.5 | 25.6 | 25.6 | 25.8 | 26.1 | 26.7 | 26.7 | 27.1 | 27.5 | 27.8 |
| Australia | 6.7 | 5.1 | 5.5 | 5.4 | 5.5 | 5.6 | 5.5 | 5.6 | 5.6 | 5.7 | 5.7 | 5.8 |
| Canada | 3.7 | 4.2 | 4.5 | 4.8 | 4.7 | 4.6 | 4.5 | 4.4 | 4.3 | 4.2 | 4.2 | 4.1 |
| South Africa | 1.8 | 2.5 | 2.3 | 2.0 | 2.2 | 2.2 | 2.4 | 2.4 | 2.5 | 2.5 | 2.6 | 2.8 |
| Other Europe | 2.4 | 0.3 | 1.5 | 1.6 | 1.7 | 1.8 | 1.9 | 1.9 | 2.0 | 2.1 | 2.4 | 2.4 |
| Former Soviet Union ¹ | 24.4 | 19.0 | 20.1 | 20.7 | 21.1 | 22.4 | 23.9 | 25.4 | 26.4 | 27.4 | 28.3 | 29.4 |
| Other foreign | 30.8 | 23.9 | 23.5 | 23.2 | 22.6 | 22.6 | 22.9 | 23.0 | 24.0 | 24.3 | 24.9 | 26.0 |
| United States | 41.0 | 32.0 | 48.3 | 53.1 | 55.5 | 56.7 | 58.6 | 60.5 | 62.4 | 64.3 | 66.2 | 68.1 |
| <i>Percent</i> | | | | | | | | | | | | |
| U.S. trade share | 29.4 | 27.5 | 35.5 | 37.5 | 38.4 | 38.4 | 38.6 | 38.8 | 39.0 | 39.3 | 39.4 | 39.5 |

1/ Covers FSU-12, includes intra-FSU trade.

2/ Covers EU-27, excludes intra-EU trade.

3/ Includes South Africa.

4/ Includes unaccounted, which can be negative.

The projections were completed in November 2012.

Table 5. Corn trade long-term projections

| | 2011/12 | 2012/13 | 2013/14 | 2014/15 | 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 |
|-------------------------------------|--------------|-------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| <i>Imports, million metric tons</i> | | | | | | | | | | | | |
| Importers | | | | | | | | | | | | |
| European Union ¹ | 6.3 | 6.5 | 6.5 | 6.2 | 5.8 | 5.8 | 5.9 | 5.9 | 5.9 | 5.9 | 6.1 | 6.2 |
| Former Soviet Union ² | 0.3 | 0.3 | 0.4 | 0.6 | 0.6 | 0.7 | 0.8 | 0.8 | 0.9 | 0.9 | 1.0 | 1.0 |
| Egypt | 7.1 | 5.5 | 6.6 | 7.1 | 7.4 | 7.4 | 7.4 | 7.5 | 7.6 | 7.7 | 7.8 | 7.9 |
| Morocco | 1.7 | 1.9 | 2.1 | 2.1 | 2.1 | 2.0 | 2.1 | 2.1 | 2.2 | 2.2 | 2.2 | 2.2 |
| Other North Africa | 4.2 | 4.3 | 4.4 | 4.6 | 4.6 | 4.6 | 4.7 | 4.8 | 4.8 | 4.8 | 4.8 | 4.9 |
| Iran | 3.6 | 3.5 | 4.2 | 4.5 | 4.5 | 4.6 | 4.6 | 4.7 | 4.8 | 4.8 | 4.8 | 4.8 |
| Saudi Arabia | 2.0 | 2.1 | 2.2 | 2.3 | 2.4 | 2.4 | 2.5 | 2.6 | 2.7 | 2.7 | 2.8 | 2.9 |
| Turkey | 0.7 | 0.5 | 0.5 | 0.7 | 0.7 | 0.7 | 0.8 | 0.8 | 0.8 | 0.8 | 0.9 | 0.9 |
| Other Middle East | 3.9 | 4.1 | 4.2 | 4.4 | 4.5 | 4.5 | 4.6 | 4.7 | 4.7 | 4.7 | 4.7 | 4.8 |
| Japan | 14.9 | 15.0 | 15.4 | 15.6 | 15.7 | 15.7 | 15.8 | 15.8 | 15.9 | 15.9 | 15.9 | 15.9 |
| South Korea | 7.6 | 8.0 | 8.5 | 8.8 | 8.9 | 9.0 | 9.1 | 9.3 | 9.5 | 9.6 | 9.7 | 9.8 |
| Taiwan | 4.2 | 4.3 | 4.3 | 4.4 | 4.4 | 4.4 | 4.5 | 4.5 | 4.6 | 4.6 | 4.6 | 4.6 |
| China | 5.2 | 2.0 | 6.8 | 7.4 | 8.0 | 9.0 | 10.8 | 12.3 | 13.9 | 15.6 | 17.6 | 19.6 |
| Indonesia | 1.5 | 1.5 | 2.0 | 2.2 | 2.2 | 2.2 | 2.3 | 2.3 | 2.3 | 2.4 | 2.4 | 2.5 |
| Malaysia | 3.0 | 3.0 | 3.1 | 3.1 | 3.2 | 3.2 | 3.3 | 3.3 | 3.4 | 3.4 | 3.5 | 3.5 |
| Other Asia & Oceania | 1.9 | 1.8 | 2.5 | 3.3 | 3.5 | 3.7 | 3.9 | 4.2 | 4.6 | 4.8 | 5.0 | 5.3 |
| Canada | 0.9 | 0.5 | 0.6 | 1.1 | 1.3 | 1.3 | 1.3 | 1.4 | 1.5 | 1.5 | 1.6 | 1.7 |
| Mexico | 11.2 | 9.0 | 10.3 | 11.2 | 12.2 | 12.8 | 13.4 | 14.0 | 14.7 | 15.4 | 16.1 | 16.9 |
| Central America & Caribbean | 5.2 | 5.4 | 5.5 | 5.5 | 5.6 | 5.6 | 5.7 | 5.8 | 5.8 | 5.9 | 5.9 | 6.0 |
| Brazil | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 |
| Other South America | 8.7 | 8.7 | 9.4 | 9.5 | 9.5 | 9.7 | 9.7 | 9.8 | 9.8 | 9.8 | 9.8 | 9.8 |
| Sub-Saharan Africa ³ | 2.0 | 1.9 | 2.0 | 2.2 | 2.3 | 2.4 | 2.5 | 2.6 | 2.7 | 2.8 | 2.9 | 3.0 |
| Other foreign ⁴ | 13.1 | -2.6 | 3.2 | 3.2 | 3.2 | 3.2 | 3.2 | 3.3 | 3.3 | 3.3 | 3.3 | 3.3 |
| United States | 0.7 | 2.5 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 |
| Total trade | 110.8 | 90.3 | 106.3 | 111.4 | 113.9 | 116.5 | 120.1 | 123.9 | 127.5 | 130.9 | 134.7 | 138.7 |
| <i>Exports, million metric tons</i> | | | | | | | | | | | | |
| Exporters | | | | | | | | | | | | |
| European Union ¹ | 3.2 | 0.5 | 1.3 | 1.5 | 1.5 | 1.6 | 1.6 | 1.6 | 1.6 | 1.7 | 1.7 | 1.7 |
| China | 0.1 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 |
| Argentina | 16.0 | 18.5 | 18.7 | 18.6 | 18.5 | 18.6 | 18.8 | 19.2 | 19.2 | 19.5 | 19.8 | 19.9 |
| Brazil | 21.0 | 16.0 | 16.0 | 15.8 | 15.2 | 15.1 | 15.4 | 15.6 | 16.7 | 17.0 | 17.5 | 18.6 |
| South Africa | 1.8 | 2.5 | 2.2 | 2.0 | 2.2 | 2.2 | 2.4 | 2.4 | 2.5 | 2.5 | 2.6 | 2.8 |
| Other Europe | 2.4 | 0.3 | 1.5 | 1.6 | 1.6 | 1.8 | 1.9 | 1.9 | 2.0 | 2.1 | 2.3 | 2.4 |
| Former Soviet Union ² | 17.3 | 14.7 | 15.2 | 15.6 | 16.0 | 17.1 | 18.1 | 19.3 | 19.9 | 20.6 | 21.2 | 21.8 |
| Other foreign | 9.8 | 8.3 | 7.9 | 7.9 | 7.9 | 7.9 | 7.9 | 7.8 | 7.8 | 7.8 | 7.8 | 7.9 |
| United States | 39.2 | 29.2 | 43.2 | 48.3 | 50.8 | 52.1 | 54.0 | 55.9 | 57.8 | 59.7 | 61.6 | 63.5 |
| <i>Percent</i> | | | | | | | | | | | | |
| U.S. trade share | 35.4 | 32.3 | 40.6 | 43.3 | 44.6 | 44.7 | 44.9 | 45.1 | 45.3 | 45.6 | 45.7 | 45.8 |

1/ Covers EU-27, excludes intra-EU trade.

2/ Covers FSU-12, includes intra-FSU trade.

3/ Includes South Africa.

4/ Includes unaccounted, which can be negative.

The projections were completed in November 2012.

Table 6. Barley trade long-term projections

| | 2011/12 | 2012/13 | 2013/14 | 2014/15 | 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 |
|--|-------------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| | <i>Imports, million metric tons</i> | | | | | | | | | | | |
| Importers | | | | | | | | | | | | |
| Former Soviet Union ¹ | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.9 | 0.9 | 0.9 | 0.9 | 0.9 | 0.9 |
| Japan | 1.3 | 1.3 | 1.3 | 1.3 | 1.3 | 1.3 | 1.3 | 1.3 | 1.3 | 1.3 | 1.3 | 1.3 |
| China | 2.5 | 2.4 | 2.4 | 2.5 | 2.6 | 2.7 | 2.7 | 2.8 | 2.9 | 3.0 | 3.2 | 3.3 |
| Latin America ² | 0.9 | 0.9 | 0.9 | 1.0 | 1.0 | 1.0 | 1.1 | 1.1 | 1.1 | 1.1 | 1.2 | 1.2 |
| Saudi Arabia | 8.5 | 7.0 | 7.7 | 8.0 | 8.0 | 8.1 | 8.1 | 8.2 | 8.3 | 8.3 | 8.4 | 8.4 |
| Iran | 1.3 | 1.0 | 0.9 | 0.9 | 1.1 | 1.1 | 1.1 | 1.2 | 1.2 | 1.2 | 1.3 | 1.3 |
| Other Middle East | 2.1 | 1.4 | 1.7 | 1.8 | 1.8 | 1.9 | 1.9 | 1.9 | 1.9 | 2.0 | 2.0 | 2.0 |
| Morocco | 0.6 | 0.7 | 0.6 | 0.5 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.7 | 0.7 |
| Other North Africa | 1.1 | 0.5 | 0.6 | 0.7 | 0.8 | 0.9 | 1.0 | 1.0 | 1.0 | 1.1 | 1.1 | 1.1 |
| Other foreign ³ | 0.6 | 0.5 | 1.0 | 1.0 | 1.1 | 1.1 | 1.1 | 1.1 | 1.2 | 1.2 | 1.2 | 1.2 |
| United States | 0.5 | 0.5 | 0.4 | 0.4 | 0.4 | 0.4 | 0.4 | 0.4 | 0.4 | 0.4 | 0.4 | 0.4 |
| Total trade | 20.3 | 16.9 | 18.4 | 19.0 | 19.6 | 20.0 | 20.2 | 20.5 | 20.9 | 21.2 | 21.6 | 22.0 |
| | <i>Exports, million metric tons</i> | | | | | | | | | | | |
| Exporters | | | | | | | | | | | | |
| European Union ⁴ | 3.1 | 3.3 | 3.3 | 3.5 | 3.8 | 4.0 | 3.8 | 3.8 | 3.9 | 4.0 | 4.0 | 3.9 |
| Argentina | 3.6 | 4.0 | 4.0 | 4.1 | 4.2 | 4.3 | 4.4 | 4.4 | 4.5 | 4.5 | 4.6 | 4.7 |
| Australia | 5.2 | 3.8 | 4.4 | 4.4 | 4.5 | 4.5 | 4.5 | 4.5 | 4.6 | 4.6 | 4.6 | 4.7 |
| Canada | 1.3 | 1.3 | 1.7 | 1.9 | 1.9 | 1.7 | 1.6 | 1.5 | 1.4 | 1.3 | 1.2 | 1.1 |
| Russia | 3.5 | 1.7 | 2.1 | 2.1 | 2.2 | 2.2 | 2.3 | 2.3 | 2.3 | 2.4 | 2.4 | 2.5 |
| Ukraine | 2.5 | 2.2 | 2.1 | 2.1 | 2.0 | 2.2 | 2.5 | 2.7 | 2.9 | 3.1 | 3.2 | 3.4 |
| Other Former Soviet Union ⁵ | 0.7 | 0.2 | 0.5 | 0.6 | 0.6 | 0.7 | 0.8 | 0.9 | 0.9 | 1.0 | 1.2 | 1.4 |
| Turkey | 0.1 | 0.2 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Other foreign | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 |
| United States | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 |
| | <i>Percent</i> | | | | | | | | | | | |
| U.S. trade share | 0.9 | 1.3 | 1.2 | 1.1 | 1.1 | 1.1 | 1.1 | 1.1 | 1.0 | 1.0 | 1.0 | 1.0 |

1/ Covers FSU-12, includes intra-FSU trade.

2/ Includes Mexico.

3/ Includes unaccounted.

4/ Covers EU-27, excludes intra-EU trade.

5/ Covers FSU-12 except Russia and Ukraine, includes intra-FSU trade.

The projections were completed in November 2012.

Table 7. Sorghum trade long-term projections

| | 2011/12 | 2012/13 | 2013/14 | 2014/15 | 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 |
|---------------------------------|-------------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Importers | <i>Imports, million metric tons</i> | | | | | | | | | | | |
| Japan | 1.5 | 1.5 | 1.4 | 1.4 | 1.4 | 1.4 | 1.4 | 1.4 | 1.4 | 1.4 | 1.4 | 1.4 |
| Mexico | 1.3 | 2.2 | 4.5 | 4.1 | 4.0 | 4.0 | 4.0 | 4.0 | 4.0 | 4.1 | 4.1 | 4.2 |
| North Africa & Middle East | 0.1 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 |
| South America | 1.4 | 1.1 | 1.1 | 1.2 | 1.2 | 1.2 | 1.3 | 1.3 | 1.3 | 1.3 | 1.4 | 1.4 |
| Sub-Saharan Africa ¹ | 0.4 | 0.6 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 |
| Other ² | 0.7 | 1.0 | 0.9 | 0.9 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.9 | 0.9 |
| Total trade | 5.4 | 6.5 | 8.7 | 8.5 | 8.4 | 8.3 | 8.4 | 8.4 | 8.5 | 8.6 | 8.7 | 8.7 |
| Exporters | <i>Exports, million metric tons</i> | | | | | | | | | | | |
| Argentina | 2.3 | 2.6 | 2.7 | 2.8 | 2.8 | 2.9 | 3.0 | 3.0 | 3.0 | 3.1 | 3.1 | 3.2 |
| Australia | 1.2 | 1.1 | 0.9 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.9 | 0.9 |
| Other foreign | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 |
| United States | 1.6 | 2.5 | 4.8 | 4.6 | 4.4 | 4.3 | 4.3 | 4.3 | 4.3 | 4.3 | 4.3 | 4.3 |
| U.S. trade share | <i>Percent</i> | | | | | | | | | | | |
| | 29.8 | 38.8 | 55.5 | 54.0 | 53.0 | 51.9 | 51.5 | 51.3 | 50.9 | 50.3 | 49.8 | 49.4 |

1/ Includes South Africa.

2/ EU-27 and the rest of the world. Excludes intra-EU trade. Includes unaccounted.
The projections were completed in November 2012.

Table 8. Wheat trade long-term projections

| | 2011/12 | 2012/13 | 2013/14 | 2014/15 | 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 |
|--|-------------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| | <i>Imports, million metric tons</i> | | | | | | | | | | | |
| Importers | | | | | | | | | | | | |
| Morocco | 3.6 | 4.5 | 3.6 | 3.6 | 3.7 | 3.8 | 3.9 | 3.9 | 4.0 | 4.1 | 4.1 | 4.2 |
| Egypt | 11.7 | 9.5 | 10.8 | 11.0 | 11.2 | 11.3 | 11.3 | 11.5 | 11.6 | 11.8 | 11.9 | 12.0 |
| Other North Africa | 9.4 | 8.1 | 9.4 | 9.4 | 9.3 | 9.3 | 9.3 | 9.3 | 9.4 | 9.3 | 9.3 | 9.4 |
| Saudi Arabia | 2.9 | 2.3 | 2.3 | 2.5 | 2.6 | 2.8 | 2.9 | 3.0 | 3.1 | 3.2 | 3.3 | 3.4 |
| Iran | 0.8 | 3.0 | 1.0 | 1.0 | 1.1 | 1.1 | 1.2 | 1.3 | 1.4 | 1.6 | 1.7 | 1.9 |
| Iraq | 3.8 | 3.7 | 3.9 | 3.8 | 3.8 | 3.9 | 4.0 | 4.1 | 4.2 | 4.3 | 4.4 | 4.5 |
| Other Middle East | 9.5 | 8.6 | 9.3 | 9.5 | 9.7 | 10.0 | 10.2 | 10.3 | 10.5 | 10.7 | 10.8 | 10.9 |
| West African Community ¹ | 6.3 | 5.9 | 6.2 | 6.5 | 6.7 | 6.7 | 7.0 | 7.2 | 7.4 | 7.7 | 7.9 | 8.1 |
| Other Sub-Saharan Africa ² | 11.6 | 9.7 | 10.4 | 10.7 | 11.1 | 11.5 | 11.9 | 12.2 | 12.5 | 12.9 | 13.2 | 13.6 |
| Mexico | 5.0 | 4.2 | 4.0 | 4.0 | 4.1 | 4.1 | 4.2 | 4.2 | 4.3 | 4.3 | 4.4 | 4.4 |
| Central America & Caribbean | 3.7 | 3.6 | 3.7 | 3.7 | 3.7 | 3.7 | 3.7 | 3.8 | 3.8 | 3.8 | 3.8 | 3.8 |
| Brazil | 7.3 | 7.0 | 7.2 | 7.2 | 7.3 | 7.4 | 7.5 | 7.5 | 7.5 | 7.6 | 7.6 | 7.7 |
| Other South America | 6.8 | 6.5 | 6.6 | 6.6 | 6.7 | 6.8 | 6.8 | 6.9 | 6.9 | 7.0 | 7.1 | 7.1 |
| European Union ³ | 7.4 | 6.0 | 6.0 | 5.9 | 6.1 | 6.2 | 6.1 | 6.1 | 6.0 | 6.0 | 5.9 | 5.8 |
| Other Europe | 1.9 | 1.8 | 1.9 | 1.8 | 1.8 | 1.8 | 1.8 | 1.9 | 1.9 | 1.9 | 1.9 | 1.9 |
| Former Soviet Union ⁴ | 7.6 | 6.6 | 6.4 | 6.6 | 6.7 | 6.7 | 6.7 | 6.8 | 6.9 | 6.9 | 7.0 | 7.0 |
| Japan | 6.4 | 5.9 | 5.9 | 5.8 | 5.8 | 5.8 | 5.8 | 5.8 | 5.8 | 5.8 | 5.8 | 5.8 |
| South Korea | 5.2 | 4.4 | 4.3 | 4.3 | 4.1 | 4.0 | 4.0 | 4.0 | 4.0 | 3.9 | 3.9 | 3.9 |
| Philippines | 4.0 | 3.2 | 3.2 | 3.3 | 3.3 | 3.3 | 3.3 | 3.4 | 3.5 | 3.5 | 3.6 | 3.6 |
| Indonesia | 6.5 | 6.6 | 6.8 | 7.0 | 7.2 | 7.4 | 7.6 | 7.7 | 7.9 | 8.2 | 8.4 | 8.6 |
| China | 2.9 | 2.5 | 2.5 | 2.5 | 2.6 | 2.6 | 2.7 | 2.8 | 3.0 | 3.1 | 3.2 | 3.2 |
| Bangladesh | 2.0 | 3.0 | 3.1 | 3.2 | 3.4 | 3.4 | 3.5 | 3.7 | 3.9 | 4.0 | 4.2 | 4.4 |
| Malaysia | 1.5 | 1.4 | 1.5 | 1.5 | 1.5 | 1.6 | 1.6 | 1.6 | 1.6 | 1.6 | 1.6 | 1.7 |
| Thailand | 2.6 | 1.8 | 1.8 | 1.8 | 1.8 | 1.8 | 1.9 | 1.9 | 1.9 | 1.9 | 2.0 | 2.0 |
| Vietnam | 2.7 | 2.6 | 2.2 | 2.3 | 2.3 | 2.4 | 2.5 | 2.6 | 2.7 | 2.8 | 2.9 | 3.0 |
| Pakistan | 0.2 | 0.2 | 0.0 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.0 |
| Other Asia & Oceania | 7.4 | 6.9 | 7.6 | 7.9 | 8.2 | 8.5 | 8.9 | 9.2 | 9.5 | 9.8 | 10.2 | 10.6 |
| Other foreign ⁵ | 12.6 | -0.3 | 6.7 | 6.7 | 6.8 | 6.9 | 6.9 | 7.0 | 7.1 | 7.2 | 7.3 | 7.4 |
| United States | 3.1 | 3.5 | 3.3 | 3.4 | 3.5 | 3.7 | 3.8 | 3.8 | 3.8 | 3.8 | 3.8 | 3.8 |
| Total trade | 156.3 | 132.7 | 141.5 | 143.6 | 146.1 | 148.6 | 151.0 | 153.4 | 155.9 | 158.6 | 161.2 | 163.7 |
| | <i>Exports, million metric tons</i> | | | | | | | | | | | |
| Exporters | | | | | | | | | | | | |
| European Union ³ | 16.4 | 17.5 | 19.8 | 20.3 | 21.1 | 21.7 | 22.7 | 23.3 | 23.6 | 24.0 | 24.6 | 25.2 |
| Canada | 17.4 | 19.0 | 18.0 | 18.9 | 18.2 | 17.9 | 18.0 | 18.0 | 18.1 | 18.1 | 18.2 | 18.3 |
| Australia | 24.7 | 16.5 | 18.1 | 18.7 | 19.0 | 19.3 | 19.6 | 19.8 | 20.0 | 20.2 | 20.6 | 21.0 |
| Argentina | 12.7 | 5.5 | 7.1 | 7.3 | 7.1 | 6.9 | 6.8 | 6.8 | 6.7 | 6.7 | 6.6 | 6.6 |
| Russia | 21.6 | 10.0 | 15.1 | 17.9 | 19.7 | 20.9 | 21.1 | 21.9 | 23.0 | 24.2 | 24.7 | 25.3 |
| Ukraine | 5.4 | 6.0 | 8.8 | 9.1 | 9.3 | 9.6 | 10.1 | 10.6 | 11.1 | 11.5 | 12.0 | 12.6 |
| Other Former Soviet Union ⁶ | 12.2 | 7.6 | 7.9 | 8.2 | 8.9 | 9.4 | 9.8 | 10.1 | 10.5 | 10.9 | 11.3 | 11.8 |
| Other Europe | 0.6 | 0.6 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.8 | 0.8 |
| India | 0.9 | 6.0 | 5.0 | 3.2 | 2.1 | 1.7 | 1.4 | 1.1 | 0.9 | 0.7 | 0.4 | 0.2 |
| China | 1.0 | 1.0 | 1.0 | 1.0 | 1.1 | 1.1 | 1.1 | 1.1 | 1.1 | 1.1 | 1.1 | 1.1 |
| Turkey | 3.7 | 3.5 | 3.4 | 3.7 | 3.8 | 4.1 | 4.3 | 4.5 | 4.6 | 4.7 | 4.9 | 5.0 |
| Other foreign | 11.0 | 9.6 | 9.5 | 9.5 | 9.6 | 9.8 | 9.9 | 10.0 | 10.1 | 10.2 | 10.3 | 10.4 |
| United States | 28.6 | 29.9 | 27.2 | 25.2 | 25.3 | 25.4 | 25.6 | 25.6 | 25.6 | 25.6 | 25.6 | 25.6 |
| | <i>Percent</i> | | | | | | | | | | | |
| U.S. trade share | 18.3 | 22.6 | 19.2 | 17.5 | 17.3 | 17.1 | 16.9 | 16.7 | 16.4 | 16.1 | 15.9 | 15.6 |

1/ Economic Community of West African States

2/ Includes South Africa.

3/ Covers EU-27, excludes intra-EU trade.

4/ Covers FSU-12, includes intra-FSU trade.

5/ Includes unaccounted, which can be negative.

6/ Covers FSU-12 except Russia and Ukraine, includes intra-FSU trade.

The projections were completed in November 2012.

Table 9. Rice trade long-term projections

| | 2011/12 | 2012/13 | 2013/14 | 2014/15 | 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 |
|---------------------------------------|-------------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| | <i>Imports, million metric tons</i> | | | | | | | | | | | |
| Importers | | | | | | | | | | | | |
| Canada | 0.35 | 0.35 | 0.35 | 0.36 | 0.36 | 0.37 | 0.37 | 0.37 | 0.38 | 0.38 | 0.39 | 0.39 |
| Mexico | 0.64 | 0.73 | 0.71 | 0.74 | 0.76 | 0.77 | 0.79 | 0.81 | 0.83 | 0.85 | 0.87 | 0.89 |
| Central America/Caribbean | 1.49 | 1.48 | 1.51 | 1.54 | 1.56 | 1.58 | 1.61 | 1.63 | 1.66 | 1.70 | 1.73 | 1.76 |
| Brazil | 0.75 | 0.75 | 0.64 | 0.64 | 0.64 | 0.64 | 0.64 | 0.64 | 0.65 | 0.65 | 0.65 | 0.65 |
| Other South America | 0.85 | 0.85 | 0.53 | 0.50 | 0.57 | 0.59 | 0.60 | 0.63 | 0.66 | 0.68 | 0.71 | 0.74 |
| European Union ¹ | 1.21 | 1.40 | 1.55 | 1.57 | 1.58 | 1.60 | 1.61 | 1.62 | 1.63 | 1.64 | 1.64 | 1.65 |
| Former Soviet Union ² | 0.37 | 0.41 | 0.42 | 0.40 | 0.40 | 0.40 | 0.38 | 0.36 | 0.34 | 0.33 | 0.31 | 0.29 |
| Other Europe | 0.14 | 0.14 | 0.14 | 0.15 | 0.15 | 0.15 | 0.15 | 0.15 | 0.15 | 0.16 | 0.16 | 0.16 |
| Bangladesh | 0.56 | 0.25 | 0.55 | 0.63 | 0.71 | 0.79 | 0.87 | 0.95 | 1.03 | 1.11 | 1.18 | 1.25 |
| China | 1.62 | 2.40 | 1.82 | 1.80 | 1.82 | 1.83 | 1.84 | 1.85 | 1.86 | 1.87 | 1.86 | 1.86 |
| Japan | 0.70 | 0.70 | 0.68 | 0.68 | 0.68 | 0.68 | 0.68 | 0.68 | 0.68 | 0.68 | 0.68 | 0.68 |
| South Korea | 0.36 | 0.60 | 0.41 | 0.41 | 0.41 | 0.41 | 0.41 | 0.41 | 0.41 | 0.41 | 0.41 | 0.41 |
| Indonesia | 1.70 | 1.45 | 2.50 | 2.65 | 2.73 | 2.87 | 3.03 | 3.19 | 3.39 | 3.61 | 3.81 | 3.96 |
| Malaysia | 1.09 | 1.05 | 1.10 | 1.16 | 1.20 | 1.24 | 1.28 | 1.32 | 1.35 | 1.38 | 1.41 | 1.43 |
| Philippines | 1.50 | 1.50 | 1.60 | 1.70 | 1.80 | 1.90 | 2.00 | 2.10 | 2.20 | 2.30 | 2.40 | 2.50 |
| Other Asia & Oceania | 2.68 | 2.74 | 2.72 | 2.80 | 2.88 | 2.93 | 2.98 | 3.04 | 3.09 | 3.14 | 3.19 | 3.24 |
| Iraq | 1.35 | 1.35 | 1.32 | 1.35 | 1.39 | 1.43 | 1.45 | 1.49 | 1.52 | 1.55 | 1.57 | 1.60 |
| Iran | 1.90 | 1.95 | 1.95 | 1.97 | 2.00 | 2.03 | 2.06 | 2.09 | 2.11 | 2.13 | 2.15 | 2.17 |
| Saudi Arabia | 1.15 | 1.23 | 1.22 | 1.22 | 1.22 | 1.24 | 1.26 | 1.28 | 1.30 | 1.32 | 1.34 | 1.37 |
| Other N. Africa & M. East | 2.56 | 2.14 | 2.26 | 2.31 | 2.39 | 2.46 | 2.52 | 2.58 | 2.63 | 2.69 | 2.74 | 2.79 |
| West African Community ³ | 8.17 | 6.32 | 6.70 | 6.94 | 7.20 | 7.50 | 7.80 | 8.10 | 8.40 | 8.70 | 8.97 | 9.21 |
| Other Sub-Saharan Africa ⁴ | 2.41 | 2.53 | 2.56 | 2.63 | 2.72 | 2.83 | 2.90 | 3.00 | 3.10 | 3.20 | 3.30 | 3.40 |
| South Africa | 0.95 | 1.00 | 1.04 | 1.05 | 1.07 | 1.09 | 1.10 | 1.12 | 1.14 | 1.15 | 1.17 | 1.19 |
| Other foreign ⁵ | 3.27 | 2.58 | 2.54 | 2.54 | 2.55 | 2.56 | 2.57 | 2.57 | 2.58 | 2.58 | 2.59 | 2.59 |
| United States | 0.61 | 0.65 | 0.65 | 0.66 | 0.67 | 0.68 | 0.68 | 0.69 | 0.70 | 0.71 | 0.72 | 0.74 |
| Total imports | 38.37 | 36.52 | 37.49 | 38.40 | 39.48 | 40.56 | 41.59 | 42.68 | 43.78 | 44.91 | 45.95 | 46.92 |
| | <i>Exports, million metric tons</i> | | | | | | | | | | | |
| Exporters | | | | | | | | | | | | |
| Australia | 0.45 | 0.50 | 0.48 | 0.47 | 0.47 | 0.47 | 0.48 | 0.49 | 0.49 | 0.50 | 0.50 | 0.51 |
| Argentina | 0.68 | 0.53 | 0.63 | 0.66 | 0.69 | 0.70 | 0.70 | 0.71 | 0.72 | 0.72 | 0.72 | 0.73 |
| Other South America | 2.65 | 2.08 | 2.19 | 2.24 | 2.30 | 2.36 | 2.41 | 2.49 | 2.56 | 2.62 | 2.67 | 2.74 |
| European Union ¹ | 0.20 | 0.24 | 0.25 | 0.25 | 0.25 | 0.25 | 0.25 | 0.25 | 0.25 | 0.26 | 0.26 | 0.26 |
| China | 0.44 | 0.50 | 0.64 | 0.69 | 0.69 | 0.76 | 0.83 | 0.87 | 0.93 | 0.99 | 1.05 | 1.11 |
| India | 10.40 | 7.25 | 6.83 | 5.75 | 5.50 | 5.75 | 5.91 | 6.05 | 6.25 | 6.41 | 6.57 | 6.75 |
| Pakistan | 3.75 | 4.00 | 4.13 | 4.20 | 4.30 | 4.40 | 4.50 | 4.60 | 4.70 | 4.80 | 4.90 | 5.00 |
| Thailand | 6.50 | 8.00 | 8.80 | 9.80 | 10.56 | 10.98 | 11.35 | 11.71 | 12.00 | 12.36 | 12.71 | 12.98 |
| Vietnam | 7.20 | 7.00 | 7.44 | 7.65 | 7.75 | 7.85 | 7.95 | 8.10 | 8.30 | 8.50 | 8.63 | 8.75 |
| Burma | 0.70 | 0.60 | 0.68 | 0.74 | 0.77 | 0.77 | 0.80 | 0.88 | 0.94 | 0.99 | 1.05 | 1.10 |
| Cambodia | 0.80 | 0.95 | 1.02 | 1.12 | 1.15 | 1.16 | 1.22 | 1.29 | 1.35 | 1.41 | 1.48 | 1.55 |
| Egypt | 0.60 | 0.85 | 0.74 | 0.70 | 0.66 | 0.62 | 0.59 | 0.57 | 0.55 | 0.52 | 0.50 | 0.48 |
| Other foreign | 0.78 | 0.75 | 0.72 | 0.72 | 0.72 | 0.73 | 0.74 | 0.74 | 0.74 | 0.74 | 0.75 | 0.75 |
| United States | 3.22 | 3.28 | 2.93 | 3.39 | 3.67 | 3.77 | 3.87 | 3.94 | 4.01 | 4.08 | 4.15 | 4.22 |
| Total exports | 38.37 | 36.52 | 37.49 | 38.40 | 39.48 | 40.56 | 41.59 | 42.68 | 43.78 | 44.91 | 45.95 | 46.92 |
| | <i>Percent</i> | | | | | | | | | | | |
| U.S. trade share | 8.4 | 9.0 | 7.8 | 8.8 | 9.3 | 9.3 | 9.3 | 9.2 | 9.1 | 9.1 | 9.0 | 9.0 |

1/ Covers EU-27, excludes intra-EU trade.

2/ Covers FSU-12, includes intra-FSU trade.

3/ Economic Community of West African States.

4/ Excludes South Africa.

5/ Includes unaccounted.

The projections were completed in November 2012.

Table 10. Soybean trade long-term projections

| | 2011/12 | 2012/13 | 2013/14 | 2014/15 | 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 |
|-------------------------------------|-------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| <i>Imports, million metric tons</i> | | | | | | | | | | | | |
| Importers | | | | | | | | | | | | |
| European Union ¹ | 11.3 | 11.0 | 11.7 | 11.2 | 11.2 | 11.2 | 11.2 | 11.2 | 11.3 | 11.3 | 11.3 | 11.3 |
| Japan | 2.8 | 2.6 | 2.6 | 2.6 | 2.6 | 2.6 | 2.7 | 2.7 | 2.7 | 2.7 | 2.7 | 2.7 |
| South Korea | 1.1 | 1.2 | 1.2 | 1.2 | 1.2 | 1.2 | 1.2 | 1.2 | 1.2 | 1.2 | 1.2 | 1.2 |
| Taiwan | 2.3 | 2.3 | 2.3 | 2.2 | 2.3 | 2.3 | 2.3 | 2.3 | 2.3 | 2.3 | 2.3 | 2.3 |
| Mexico | 3.4 | 3.4 | 3.7 | 3.8 | 3.8 | 3.9 | 4.0 | 4.1 | 4.2 | 4.3 | 4.4 | 4.5 |
| Former Soviet Union ² | 0.7 | 0.8 | 1.1 | 1.2 | 1.3 | 1.4 | 1.4 | 1.3 | 1.3 | 1.2 | 1.2 | 1.1 |
| N. Africa & Middle East | 3.5 | 3.5 | 3.8 | 3.8 | 3.9 | 4.0 | 4.1 | 4.2 | 4.3 | 4.4 | 4.6 | 4.7 |
| China | 59.2 | 63.0 | 67.6 | 71.6 | 75.2 | 79.0 | 82.8 | 86.7 | 90.6 | 94.7 | 98.8 | 102.9 |
| Malaysia | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.7 | 0.7 | 0.7 |
| Indonesia | 2.0 | 2.0 | 2.1 | 2.1 | 2.1 | 2.2 | 2.2 | 2.2 | 2.2 | 2.3 | 2.3 | 2.3 |
| Other | 2.5 | 10.6 | 8.4 | 8.7 | 8.9 | 9.1 | 9.4 | 9.6 | 9.8 | 10.0 | 10.3 | 10.5 |
| Total imports | 89.3 | 100.9 | 105.0 | 109.0 | 113.2 | 117.6 | 121.9 | 126.2 | 130.6 | 135.1 | 139.7 | 144.3 |
| <i>Exports, million metric tons</i> | | | | | | | | | | | | |
| Exporters | | | | | | | | | | | | |
| Argentina | 7.4 | 12.0 | 10.9 | 12.2 | 13.1 | 13.7 | 14.2 | 15.0 | 15.7 | 16.2 | 16.8 | 17.5 |
| Brazil | 36.3 | 37.4 | 39.4 | 42.3 | 43.8 | 46.2 | 48.9 | 51.3 | 54.4 | 57.6 | 60.8 | 63.8 |
| Other South America | 4.7 | 7.3 | 7.8 | 8.1 | 8.5 | 8.9 | 9.3 | 9.7 | 10.1 | 10.5 | 10.9 | 11.3 |
| Ukraine | 1.3 | 1.8 | 1.9 | 2.1 | 2.2 | 2.4 | 2.5 | 2.7 | 2.8 | 2.9 | 3.1 | 3.2 |
| Other foreign | 3.5 | 3.4 | 3.9 | 3.9 | 4.0 | 4.1 | 4.1 | 4.2 | 4.3 | 4.4 | 4.5 | 4.6 |
| United States | 36.1 | 38.9 | 41.2 | 40.3 | 41.6 | 42.5 | 42.9 | 43.3 | 43.3 | 43.5 | 43.7 | 43.8 |
| Total exports | 89.3 | 100.9 | 105.0 | 109.0 | 113.2 | 117.6 | 121.9 | 126.2 | 130.6 | 135.1 | 139.7 | 144.3 |
| <i>Percent</i> | | | | | | | | | | | | |
| U.S. trade share | 40.4 | 38.6 | 39.3 | 37.0 | 36.8 | 36.1 | 35.2 | 34.3 | 33.1 | 32.2 | 31.3 | 30.4 |

1/ Covers EU-27, excludes intra-EU trade.

2/ Covers FSU-12, includes intra-FSU trade.

The projections were completed in November 2012.

Table 11. Soybean meal trade long-term projections

| | 2011/12 | 2012/13 | 2013/14 | 2014/15 | 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 |
|-------------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| <i>Imports, million metric tons</i> | | | | | | | | | | | | |
| Importers | | | | | | | | | | | | |
| European Union ¹ | 21.2 | 21.9 | 23.0 | 23.7 | 24.6 | 24.5 | 24.4 | 24.4 | 24.5 | 24.6 | 24.6 | 24.5 |
| Former Soviet Union ² | 0.8 | 0.7 | 0.7 | 0.8 | 0.8 | 0.8 | 0.8 | 0.9 | 0.9 | 1.0 | 1.0 | 1.0 |
| Other Europe | 0.6 | 0.7 | 0.6 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.8 |
| Canada | 1.1 | 1.1 | 1.1 | 1.1 | 1.1 | 1.1 | 1.2 | 1.2 | 1.2 | 1.2 | 1.3 | 1.3 |
| Japan | 2.3 | 2.4 | 2.5 | 2.5 | 2.5 | 2.5 | 2.5 | 2.5 | 2.5 | 2.5 | 2.5 | 2.5 |
| Southeast Asia | 11.2 | 11.2 | 11.3 | 12.0 | 12.4 | 12.7 | 13.1 | 13.7 | 14.1 | 14.6 | 15.0 | 15.5 |
| Mexico | 1.5 | 1.6 | 1.6 | 1.6 | 1.7 | 1.7 | 1.8 | 1.9 | 1.9 | 2.0 | 2.1 | 2.2 |
| Other Latin America | 6.5 | 6.6 | 6.9 | 7.1 | 7.3 | 7.6 | 7.8 | 8.0 | 8.2 | 8.5 | 8.7 | 8.9 |
| North Africa & Middle East | 7.4 | 7.3 | 8.0 | 8.3 | 8.5 | 8.6 | 8.8 | 8.9 | 9.1 | 9.3 | 9.4 | 9.6 |
| Other | 6.3 | 7.7 | 6.7 | 6.9 | 7.1 | 7.1 | 7.2 | 7.3 | 7.4 | 7.5 | 7.7 | 7.8 |
| Total imports | 59.0 | 61.1 | 62.4 | 64.9 | 66.7 | 67.5 | 68.3 | 69.4 | 70.7 | 71.8 | 72.9 | 73.9 |
| <i>Exports, million metric tons</i> | | | | | | | | | | | | |
| Exporters | | | | | | | | | | | | |
| Argentina | 26.0 | 29.8 | 30.4 | 32.4 | 33.6 | 33.9 | 34.4 | 35.3 | 36.4 | 37.3 | 38.2 | 38.9 |
| Brazil | 14.7 | 14.5 | 13.8 | 14.9 | 15.2 | 15.5 | 15.7 | 15.9 | 16.2 | 16.4 | 16.7 | 16.9 |
| Other South America | 2.4 | 3.4 | 3.4 | 3.5 | 3.5 | 3.6 | 3.6 | 3.7 | 3.7 | 3.8 | 3.8 | 3.9 |
| China | 1.0 | 0.9 | 0.9 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 |
| India | 4.6 | 4.3 | 3.9 | 3.5 | 3.5 | 3.5 | 3.3 | 3.1 | 2.9 | 2.7 | 2.5 | 2.3 |
| European Union ¹ | 0.9 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 |
| Other foreign | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 |
| United States | 8.8 | 7.2 | 8.8 | 8.6 | 8.9 | 9.1 | 9.3 | 9.4 | 9.6 | 9.7 | 9.8 | 10.0 |
| Total exports | 59.0 | 61.1 | 62.4 | 64.9 | 66.7 | 67.5 | 68.3 | 69.4 | 70.7 | 71.8 | 72.9 | 73.9 |
| <i>Percent</i> | | | | | | | | | | | | |
| U.S. trade share | 15.0 | 11.7 | 14.2 | 13.3 | 13.3 | 13.4 | 13.6 | 13.6 | 13.5 | 13.5 | 13.5 | 13.5 |

1/ Covers EU-27, excludes intra-EU trade.

2/ Covers FSU-12, includes intra-FSU trade.

The projections were completed in November 2012.

Table 12. Soybean oil trade long-term projections

| | 2011/12 | 2012/13 | 2013/14 | 2014/15 | 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 |
|-------------------------------------|------------|------------|------------|------------|------------|------------|------------|-------------|-------------|-------------|-------------|-------------|
| <i>Imports, million metric tons</i> | | | | | | | | | | | | |
| Importers | | | | | | | | | | | | |
| China | 1.5 | 1.4 | 1.1 | 1.1 | 1.1 | 1.0 | 1.0 | 0.9 | 0.8 | 0.8 | 0.7 | 0.6 |
| India | 1.2 | 1.1 | 1.1 | 1.4 | 1.3 | 1.3 | 1.3 | 1.3 | 1.3 | 1.4 | 1.4 | 1.4 |
| Other Asia | 1.2 | 1.1 | 1.2 | 1.2 | 1.3 | 1.3 | 1.3 | 1.4 | 1.4 | 1.4 | 1.5 | 1.5 |
| Latin America | 1.7 | 1.7 | 1.9 | 1.9 | 2.0 | 2.0 | 2.1 | 2.1 | 2.2 | 2.2 | 2.3 | 2.3 |
| North Africa & Middle East | 1.6 | 1.7 | 2.0 | 2.1 | 2.2 | 2.2 | 2.3 | 2.3 | 2.3 | 2.4 | 2.4 | 2.5 |
| European Union ¹ | 0.5 | 0.5 | 0.6 | 0.6 | 0.7 | 0.7 | 0.8 | 0.9 | 1.0 | 1.1 | 1.2 | 1.3 |
| Other | 0.9 | 1.0 | 1.1 | 1.1 | 1.1 | 1.1 | 1.1 | 1.1 | 1.1 | 1.2 | 1.2 | 1.2 |
| Total imports | 8.5 | 8.5 | 8.9 | 9.4 | 9.6 | 9.7 | 9.9 | 10.1 | 10.3 | 10.4 | 10.6 | 10.8 |
| <i>Exports, million metric tons</i> | | | | | | | | | | | | |
| Exporters | | | | | | | | | | | | |
| Argentina | 3.8 | 4.1 | 4.3 | 4.8 | 4.7 | 4.6 | 4.6 | 4.6 | 4.6 | 4.6 | 4.6 | 4.6 |
| Brazil | 1.9 | 1.7 | 1.8 | 1.9 | 2.0 | 2.1 | 2.2 | 2.3 | 2.3 | 2.3 | 2.3 | 2.4 |
| European Union ¹ | 0.7 | 0.5 | 0.5 | 0.5 | 0.5 | 0.5 | 0.5 | 0.5 | 0.5 | 0.5 | 0.5 | 0.5 |
| Other foreign | 1.5 | 1.7 | 1.7 | 1.8 | 1.8 | 1.9 | 1.9 | 2.0 | 2.0 | 2.1 | 2.1 | 2.1 |
| United States | 0.7 | 0.5 | 0.5 | 0.5 | 0.5 | 0.6 | 0.7 | 0.8 | 0.9 | 1.0 | 1.1 | 1.2 |
| Total exports | 8.5 | 8.5 | 8.9 | 9.4 | 9.6 | 9.7 | 9.9 | 10.1 | 10.3 | 10.4 | 10.6 | 10.8 |
| <i>Percent</i> | | | | | | | | | | | | |
| U.S. trade share | 7.8 | 6.4 | 6.1 | 5.3 | 5.7 | 6.1 | 6.9 | 7.7 | 8.4 | 9.1 | 10.1 | 11.0 |

1/ Covers EU-27, excludes intra-EU trade.

The projections were completed in November 2012.

Table 13. All cotton trade long-term projections

| | 2011/12 | 2012/13 | 2013/14 | 2014/15 | 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 |
|---------------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| <i>Imports, million bales</i> | | | | | | | | | | | | |
| Importers | | | | | | | | | | | | |
| European Union ¹ | 0.9 | 0.9 | 0.9 | 1.0 | 1.0 | 1.0 | 1.0 | 1.0 | 1.0 | 1.0 | 1.0 | 1.0 |
| Former Soviet Union ² | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.5 | 0.5 | 0.5 | 0.5 |
| Brazil | 0.0 | 0.1 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 |
| Mexico | 1.0 | 1.3 | 1.4 | 1.5 | 1.5 | 1.5 | 1.4 | 1.4 | 1.4 | 1.4 | 1.4 | 1.4 |
| Japan | 0.3 | 0.3 | 0.3 | 0.4 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 |
| South Korea | 1.2 | 1.2 | 1.3 | 1.3 | 1.3 | 1.3 | 1.3 | 1.3 | 1.3 | 1.3 | 1.3 | 1.3 |
| China | 24.5 | 11.0 | 8.0 | 6.5 | 6.0 | 5.5 | 5.0 | 5.0 | 5.0 | 5.0 | 5.0 | 5.0 |
| Indonesia | 2.0 | 2.3 | 2.3 | 2.4 | 2.4 | 2.5 | 2.6 | 2.6 | 2.7 | 2.7 | 2.8 | 2.8 |
| Thailand | 1.3 | 1.7 | 1.7 | 1.7 | 1.7 | 1.8 | 1.8 | 1.8 | 1.8 | 1.9 | 1.9 | 1.9 |
| Pakistan | 1.0 | 2.4 | 3.0 | 3.1 | 3.3 | 3.5 | 3.9 | 4.1 | 4.5 | 4.7 | 5.0 | 5.2 |
| India | 0.6 | 1.0 | 0.8 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.6 |
| Bangladesh | 3.1 | 3.7 | 3.9 | 4.2 | 4.4 | 4.6 | 4.8 | 5.0 | 5.2 | 5.5 | 5.7 | 6.0 |
| Taiwan | 0.9 | 1.0 | 1.1 | 1.2 | 1.2 | 1.2 | 1.2 | 1.1 | 1.1 | 1.1 | 1.1 | 1.1 |
| Other Asia & Oceania | 3.1 | 3.3 | 3.0 | 3.1 | 3.2 | 3.5 | 3.9 | 3.8 | 4.0 | 4.0 | 4.0 | 4.1 |
| Turkey | 2.4 | 3.5 | 3.6 | 3.7 | 4.0 | 4.2 | 4.3 | 4.3 | 4.3 | 4.4 | 4.4 | 4.4 |
| Other | 2.5 | 2.5 | 2.4 | 2.6 | 2.6 | 2.6 | 2.6 | 2.6 | 2.7 | 2.7 | 2.7 | 2.7 |
| Total imports | 45.3 | 36.6 | 34.6 | 34.1 | 34.6 | 35.1 | 35.6 | 36.1 | 36.9 | 37.4 | 38.0 | 38.6 |
| <i>Exports, million bales</i> | | | | | | | | | | | | |
| Exporters | | | | | | | | | | | | |
| Former Soviet Union ² | 4.2 | 4.5 | 4.7 | 4.5 | 4.4 | 4.5 | 4.5 | 4.6 | 4.6 | 4.6 | 4.7 | 4.7 |
| Australia | 4.6 | 4.2 | 4.3 | 4.3 | 4.3 | 4.4 | 4.4 | 4.4 | 4.4 | 4.4 | 4.5 | 4.5 |
| Argentina | 0.4 | 0.2 | 0.0 | 0.0 | 0.1 | 0.2 | 0.2 | 0.2 | 0.2 | 0.3 | 0.3 | 0.3 |
| Brazil | 4.8 | 4.0 | 2.9 | 2.7 | 2.8 | 3.0 | 3.2 | 3.3 | 3.5 | 3.7 | 3.9 | 4.1 |
| Other Latin America | 0.5 | 0.4 | 0.4 | 0.4 | 0.4 | 0.4 | 0.4 | 0.4 | 0.4 | 0.4 | 0.4 | 0.4 |
| Pakistan | 1.2 | 0.5 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 |
| India | 10.5 | 3.5 | 3.2 | 2.5 | 1.8 | 1.6 | 1.7 | 1.8 | 2.1 | 2.1 | 2.3 | 2.5 |
| Egypt | 0.5 | 0.3 | 0.2 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 |
| West African Community ³ | 2.1 | 2.6 | 2.9 | 2.8 | 2.9 | 3.0 | 3.0 | 3.1 | 3.2 | 3.2 | 3.3 | 3.4 |
| Other Sub-Saharan Africa ⁴ | 1.7 | 1.9 | 2.0 | 1.9 | 2.0 | 2.0 | 2.0 | 2.1 | 2.2 | 2.2 | 2.3 | 2.4 |
| Other foreign | 3.1 | 2.7 | 2.5 | 2.4 | 2.4 | 2.4 | 2.3 | 2.4 | 2.4 | 2.4 | 2.4 | 2.5 |
| United States | 11.7 | 11.6 | 11.3 | 12.1 | 13.1 | 13.3 | 13.3 | 13.3 | 13.3 | 13.3 | 13.3 | 13.3 |
| Total exports | 45.3 | 36.6 | 34.6 | 34.1 | 34.6 | 35.1 | 35.6 | 36.1 | 36.9 | 37.4 | 38.0 | 38.6 |
| <i>Percent</i> | | | | | | | | | | | | |
| U.S. trade share | 25.9 | 31.7 | 32.5 | 35.3 | 37.7 | 37.8 | 37.4 | 36.9 | 36.1 | 35.6 | 35.0 | 34.4 |

1/ Covers EU-27, excludes intra-EU trade.

2/ Covers FSU-12, includes intra-FSU trade.

3/ Economic Community of West African States.

4/ Includes South Africa.

The projections were completed in November 2012.

Table 14. Beef trade long-term projections

| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|--|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| <i>Imports, thousand metric tons, carcass weight</i> | | | | | | | | | | | | |
| Importers | | | | | | | | | | | | |
| Japan | 745 | 746 | 750 | 745 | 732 | 728 | 728 | 730 | 740 | 749 | 757 | 762 |
| South Korea | 431 | 375 | 405 | 431 | 430 | 445 | 464 | 483 | 504 | 520 | 541 | 569 |
| Taiwan | 130 | 115 | 125 | 131 | 136 | 140 | 144 | 148 | 151 | 155 | 159 | 162 |
| Philippines | 123 | 105 | 105 | 105 | 104 | 106 | 106 | 107 | 108 | 108 | 108 | 109 |
| Other Asia | 461 | 538 | 573 | 613 | 637 | 674 | 711 | 746 | 782 | 822 | 866 | 912 |
| European Union ¹ | 367 | 350 | 350 | 348 | 347 | 345 | 343 | 341 | 340 | 338 | 337 | 336 |
| Russia | 1,065 | 1,070 | 1,080 | 1,068 | 1,073 | 1,089 | 1,114 | 1,126 | 1,143 | 1,162 | 1,178 | 1,191 |
| Other Europe | 67 | 57 | 57 | 58 | 59 | 60 | 61 | 62 | 63 | 64 | 64 | 65 |
| Egypt | 217 | 230 | 230 | 238 | 247 | 263 | 275 | 283 | 289 | 297 | 301 | 311 |
| Other N. Africa & M. East | 793 | 728 | 761 | 852 | 902 | 954 | 1,015 | 1,076 | 1,117 | 1,162 | 1,210 | 1,259 |
| Mexico | 265 | 300 | 325 | 330 | 340 | 360 | 394 | 428 | 450 | 478 | 508 | 542 |
| Canada | 282 | 285 | 290 | 293 | 297 | 300 | 304 | 307 | 311 | 315 | 318 | 322 |
| United States | 933 | 1,017 | 1,188 | 1,287 | 1,366 | 1,390 | 1,429 | 1,447 | 1,477 | 1,513 | 1,531 | 1,556 |
| Major importers | 5,879 | 5,916 | 6,239 | 6,499 | 6,670 | 6,854 | 7,087 | 7,284 | 7,475 | 7,681 | 7,878 | 8,098 |
| <i>Exports, thousand metric tons, carcass weight</i> | | | | | | | | | | | | |
| Exporters | | | | | | | | | | | | |
| Australia | 1,410 | 1,380 | 1,410 | 1,416 | 1,420 | 1,423 | 1,426 | 1,429 | 1,431 | 1,433 | 1,434 | 1,435 |
| New Zealand | 503 | 521 | 529 | 543 | 548 | 550 | 556 | 559 | 561 | 564 | 569 | 574 |
| India | 1,294 | 1,680 | 2,120 | 2,284 | 2,410 | 2,512 | 2,592 | 2,654 | 2,686 | 2,746 | 2,793 | 2,865 |
| Other Asia | 128 | 118 | 117 | 110 | 110 | 112 | 115 | 119 | 123 | 127 | 131 | 135 |
| European Union ¹ | 449 | 310 | 300 | 311 | 249 | 248 | 247 | 247 | 248 | 250 | 252 | 253 |
| Argentina | 213 | 170 | 180 | 200 | 220 | 240 | 260 | 280 | 300 | 320 | 340 | 360 |
| Brazil | 1,340 | 1,394 | 1,450 | 1,503 | 1,556 | 1,606 | 1,652 | 1,696 | 1,741 | 1,788 | 1,838 | 1,887 |
| Canada | 426 | 395 | 415 | 427 | 449 | 471 | 484 | 489 | 497 | 506 | 511 | 513 |
| United States | 1,263 | 1,120 | 1,111 | 1,093 | 1,081 | 1,108 | 1,162 | 1,224 | 1,290 | 1,353 | 1,416 | 1,482 |
| Major exporters | 7,026 | 7,088 | 7,632 | 7,886 | 8,042 | 8,270 | 8,493 | 8,697 | 8,877 | 9,087 | 9,283 | 9,505 |

1/ Covers EU-27, excludes intra-EU trade.

The projections were completed in November 2012.

Table 15. Pork trade long-term projections

| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|-----------------------------|--|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| | <i>Imports, thousand metric tons, carcass weight</i> | | | | | | | | | | | |
| Importers | | | | | | | | | | | | |
| Japan | 1,254 | 1,260 | 1,260 | 1,271 | 1,282 | 1,294 | 1,305 | 1,317 | 1,328 | 1,342 | 1,352 | 1,364 |
| China | 758 | 775 | 815 | 851 | 891 | 930 | 977 | 1,019 | 1,066 | 1,115 | 1,166 | 1,220 |
| Hong Kong | 432 | 440 | 445 | 459 | 466 | 477 | 482 | 491 | 498 | 509 | 518 | 528 |
| South Korea | 640 | 500 | 505 | 510 | 515 | 520 | 525 | 530 | 535 | 541 | 546 | 552 |
| Russia | 971 | 975 | 1,000 | 996 | 980 | 966 | 946 | 922 | 901 | 874 | 844 | 812 |
| Mexico | 594 | 675 | 690 | 710 | 732 | 755 | 778 | 804 | 831 | 857 | 885 | 913 |
| Central America/Caribbean | 100 | 94 | 96 | 100 | 104 | 110 | 116 | 122 | 128 | 135 | 142 | 149 |
| Canada | 204 | 240 | 237 | 248 | 255 | 261 | 267 | 272 | 278 | 284 | 290 | 297 |
| United States | 364 | 367 | 363 | 376 | 382 | 387 | 393 | 399 | 405 | 412 | 419 | 426 |
| Major importers | 5,317 | 5,326 | 5,411 | 5,521 | 5,606 | 5,700 | 5,789 | 5,877 | 5,972 | 6,069 | 6,162 | 6,260 |
| | <i>Exports, thousand metric tons, carcass weight</i> | | | | | | | | | | | |
| Exporters | | | | | | | | | | | | |
| Brazil | 584 | 605 | 645 | 660 | 676 | 692 | 706 | 719 | 733 | 747 | 762 | 778 |
| Canada | 1,197 | 1,250 | 1,215 | 1,216 | 1,223 | 1,232 | 1,243 | 1,255 | 1,268 | 1,282 | 1,296 | 1,316 |
| Mexico | 86 | 90 | 110 | 113 | 116 | 119 | 122 | 126 | 129 | 132 | 136 | 139 |
| European Union ¹ | 2,204 | 2,280 | 2,308 | 2,332 | 2,349 | 2,371 | 2,416 | 2,460 | 2,487 | 2,521 | 2,551 | 2,591 |
| China | 244 | 215 | 200 | 201 | 202 | 202 | 204 | 205 | 207 | 209 | 211 | 213 |
| United States | 2,354 | 2,471 | 2,470 | 2,518 | 2,578 | 2,634 | 2,654 | 2,675 | 2,719 | 2,758 | 2,798 | 2,828 |
| Major exporters | 6,669 | 6,911 | 6,948 | 7,040 | 7,144 | 7,250 | 7,344 | 7,439 | 7,543 | 7,650 | 7,755 | 7,864 |

1/ Covers EU-27, excludes intra-EU trade.

The projections were completed in November 2012.

Table 16. Poultry trade long-term projections¹

| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|--------------|--------------|--------------|--------------|--------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| <i>Imports, thousand metric tons, ready to cook</i> | | | | | | | | | | | | |
| Importers | | | | | | | | | | | | |
| Russia | 531 | 535 | 550 | 414 | 374 | 358 | 345 | 326 | 300 | 272 | 243 | 214 |
| European Union ² | 804 | 821 | 830 | 798 | 801 | 811 | 819 | 828 | 838 | 845 | 853 | 860 |
| Canada | 138 | 143 | 147 | 149 | 151 | 153 | 154 | 155 | 157 | 158 | 159 | 160 |
| Mexico | 730 | 800 | 825 | 851 | 899 | 950 | 995 | 1,040 | 1,092 | 1,145 | 1,195 | 1,240 |
| Central America/Caribbean | 311 | 401 | 429 | 453 | 466 | 479 | 486 | 503 | 521 | 543 | 555 | 565 |
| Japan | 895 | 855 | 840 | 876 | 877 | 877 | 869 | 866 | 866 | 864 | 860 | 856 |
| Hong Kong | 410 | 370 | 380 | 390 | 401 | 410 | 419 | 428 | 437 | 446 | 455 | 463 |
| China | 272 | 281 | 291 | 305 | 317 | 330 | 336 | 346 | 358 | 369 | 379 | 386 |
| South Korea | 131 | 115 | 110 | 120 | 124 | 127 | 127 | 130 | 133 | 137 | 140 | 143 |
| Saudi Arabia | 785 | 750 | 750 | 781 | 803 | 826 | 839 | 860 | 874 | 887 | 901 | 917 |
| Other Middle East | 1,270 | 1,266 | 1,272 | 1,326 | 1,366 | 1,406 | 1,447 | 1,491 | 1,535 | 1,580 | 1,625 | 1,670 |
| North Africa | 130 | 126 | 170 | 153 | 142 | 142 | 146 | 155 | 165 | 176 | 188 | 200 |
| West African Community ³ | 259 | 281 | 300 | 393 | 425 | 459 | 495 | 523 | 559 | 591 | 617 | 640 |
| Other Sub-Saharan Africa | 477 | 519 | 563 | 481 | 499 | 539 | 564 | 595 | 627 | 648 | 671 | 702 |
| Major importers | 7,143 | 7,263 | 7,457 | 7,488 | 7,645 | 7,864 | 8,040 | 8,246 | 8,461 | 8,660 | 8,841 | 9,015 |
| <i>Exports, thousand metric tons, ready to cook</i> | | | | | | | | | | | | |
| Exporters | | | | | | | | | | | | |
| European Union ² | 1,182 | 1,230 | 1,275 | 1,364 | 1,398 | 1,388 | 1,386 | 1,378 | 1,369 | 1,366 | 1,358 | 1,349 |
| Brazil | 3,584 | 3,633 | 3,762 | 3,829 | 3,965 | 4,112 | 4,238 | 4,345 | 4,447 | 4,548 | 4,655 | 4,765 |
| China | 423 | 400 | 400 | 384 | 390 | 420 | 446 | 459 | 469 | 480 | 496 | 513 |
| Thailand | 467 | 540 | 585 | 593 | 629 | 664 | 699 | 736 | 776 | 819 | 857 | 895 |
| United States | 3,481 | 3,616 | 3,513 | 3,481 | 3,554 | 3,639 | 3,690 | 3,739 | 3,788 | 3,828 | 3,866 | 3,899 |
| Major exporters | 9,137 | 9,419 | 9,535 | 9,651 | 9,937 | 10,223 | 10,458 | 10,657 | 10,848 | 11,040 | 11,232 | 11,420 |

1/ Broilers and turkeys only.

2/ Covers EU-27, excludes intra-EU trade.

3/ Economic Community of West African States.

The projections were completed in November 2012.