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Grain and Feed Annual

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Report Highlights:

Wheat consumption in the Dominican Republic during Market Year 2016/2017 (MY 2016/17) is forecast at 405,000 Metric Tons (MT), with imports remaining strong at 530,000 MT. Post forecasts imports of **Corn** to remain steady at 1,225,000 MT during MY 2016/17. Even though US corn has regained its leadership in the market, US market share declined during MY 2014/15 to 48% of total imports. Post expects this trend to continue during MY 2016/17 due to higher perceived quality and increased availability of Brazilian corn, combined with the willingness of Dominican importers to pay a premium for that quality. **Rice** continues to be one of the most important agricultural products grown in the DR. Production of milled rice for MY 2016/17 is forecast at 530,000 MT and is expected to remain stable.

Commodities:

Wheat

Corn

Rice, Milled

1. WHEAT

1.1. Production

The Dominican Republic does not produce wheat; the country is completely dependent on imports to supply the domestic market.

1.2. Consumption

The Dominican Republic continues to have one of the highest per capita wheat and wheat products consumption rates in the Latin America and Caribbean Region: approximately 98 pounds per person per year. The apparent consumption (Total Supply, less formal exports and ending stocks) rate has averaged approximately 411,000 MT over the last five Calendar Years (CY), with an average annual growth of 6%. Nonetheless, substantial fluctuations in the amount of wheat processed for the domestic market is a strong indicator that large volumes of unrecorded exports are flowing across the border into Haiti, in addition to officially-registered exports.

For MY 2016/17 Post forecasts consumption of wheat and wheat products to remain stable at 405,000 MT.

DOMINICAN REPUBLIC WHEAT AND WHEAT PRODUCTS CONSUMPTION, CY 2011-2015 (MT) *

Year	Imports	Production	Exports	Apparent consumption
2011	576,823	0	188,718	393,465
2012	555,526	0	129,760	430,241
2013	479,338	0	142,951	337,292
2014	573,969	0	104,449 [#]	431,042
2015	546,369	0	80,284	466,085

**HS classification codes included: 1001, 1101, 190219, 190230, 190240, using a conversion factor of 1.368 for wheat flour (1101), pasta and couscous (190219, 190230 and 190240).*

#The volume of exports for 2014 was reviewed and updated with statistics from the National Statistics Office of the Dominican Republic (ONE)

Sources: Build by Post with reports from GTA, ONE, National Directorate of Customs (DGA) and GATS/USDA.

The country is home to a large milling industry and imports almost all of its wheat from the United States and Canada. A small quantity of wheat from Russia was also imported during CY 2015. Currently, the DR boasts a daily milling capacity of around 3,320 MT with a current average utilization of 60%, divided among six different processors:

MILLS CURRENTLY OPERATING IN THE DOMINICAN REPUBLIC

Molinos Modernos*	Grupo Bocel
Grupo J. Rafael Núñez	COOPROHARINA
Molinos del Higuamo	César Iglesias

** Also owns Molinos del Caribe.*

Molinos Modernos (45%) and Molinos Valle del Cibao (34%) process nearly 80% of all wheat imports.

Generally, the wheat flour produced is used for bread-making, crackers, cookies, cakes, pastries, and pasta. According to trade estimates, more than half of the wheat flour available in the DR is used to make a popular type of bread known as *pan de agua*. This item is consumed regularly by a broad spectrum of the population, but is more heavily consumed in urban areas. The product is typically produced by industrial bakers, along with small and medium-sized bakeries and subsequently distributed to a variety of supermarkets, “mom-and-pop” stores, markets and/or other bakeries.

In addition, wheat flour is also used for many of the products distributed in the Dominican Government’s feeding programs. Bread, cookies and muffins are included in the meals that reach more than 1.5 million school children in public schools throughout the country.

It is also worth noting that the demand for wheat flour has increased in recent years due to the growth in the HRI sector and tourism. Hotels consume large amounts of flour to make breads, cakes, pastries and other wheat-based products for four million visitors to the DR annually.

While the majority of flour production is destined for the domestic market, the DR also exports considerable quantities of wheat flour and other finished products (e.g., crackers, pasta) to neighboring Haiti. To a lesser extent, the DR has increased its exports of wheat products to Venezuela, Puerto Rico, the United States and other markets throughout the region.

Overall, millers’ storage capacity is limited and varies considerably by processor. Among the six mills operating in the country, collective storage capacity is estimated to be 155,400 MT.

1.3. Stocks

The wheat milling industry in the Dominican Republic is mostly a “just in time” operation. Wheat shipments from the US generally arrive on a reliable schedule with shipping times of around 5 days, reducing the need to assume storage costs. Shipments from Canada also arrive on reliable schedules although with shipping times of approximately 10 days. Stocks are held by the private millers.

For MY 2016/17 Post forecasts ending stocks at 54,000 MT, lower than the levels estimated for MY 2015/16 of 69,000 MT.

1.4. Trade

For MY 2016/17 Post forecasts imports of wheat and wheat products to the Dominican Republic at 530,000 MT, slightly less than the 550,000 MT estimated to be imported during MY 2015/16. Although Dominican exports of wheat flour and wheat products to Haiti (both official and unrecorded) remain strong, exports of wheat products to Venezuela will continue to be affected by their current economic crisis. During CY 2015, Dominican exports of pasta to Venezuela decreased by 80%, from 12,109 MT in CY 2014 to 2,355 MT.

Imports of wheat grain by the DR during MY 2014/15 are estimated at 557,091 MT, a significant increase from the 494,754 MT imported during MY 2013/14. The demand for wheat grain in the Dominican Republic is relatively stable and fluctuates based on: 1) local population growth; 2) the number of tourists arriving in the country; and 3) the consumption of wheat flour and wheat products in

neighbor country of Haiti.

**DOMINICAN REPUBLIC WHEAT GRAIN IMPORTS BY PARTNER,
MY 2011-2015 (MT)**

Country	Years				
	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
United States	533,326	548,341	491,488	494,754	456,723
Germany	0	0	0	0	0
Guatemala	0	0	81	0	0
Canada	16,600	9,001	12,400	0	100,368
France	0	0	0	0	0
Total	549,926	557,342	503,969	494,754	557,091

**HS heading 1001*

Source: Build by Post with reports from GTA, GATS/USDA

Post forecasts imports of US wheat grain to the Dominican Republic at 400,000 MT during MY 2016/17, up from the 350,000 MT estimated for MY 2015/16. This will still represent a 12% decrease from MY 2014/15 when the Dominican Republic imported approximately 82% from the US (456,723 MT). The lower market share is mainly due to competition from Canadian wheat imports. Historically, Canada has provided wheat to the Dominican market in years of overproduction. However, during the last two Marketing Years, Canada has been regularly supplying Dominican millers. Local millers cite a preference for Canadian wheat due to prices (between 5-10 US\$/MT less Vs. US. Wheat) and higher protein content.

On average from 2011 to 2015, the DR imported approximately 90% of its wheat grain (HS 1001) from the United States. Smaller amounts were supplied by Canada (an average of 11% during the same time period), along with Germany, France and Russia.

Currently, the majority of Dominican wheat imports are comprised of Hard Red Winter (HRW), Soft Red Winter (SRW) and Hard Red Spring (HRS). During MY 2014/15, the Dominican Republic imported 38% HRW, mainly for bread production; 32% SRW, primarily used for cakes and pastry; and 30% HRS.

For MY 2016/17, Post forecasts exports of wheat flour from the DR to Haiti through formal trade channels at around 75,000 MT; slightly less to the 79,000 MT estimated to be exported during MY 2015/16. During May 2015, Haiti imposed a ban on Dominican wheat flour ostensibly due to: 1) alleged content of potassium bromate in the flour composition; and, 2) the need to establish a more formal transportation channel for the flour, requiring Dominican shipments to be delivered by sea. In the short term, Haiti is not expected to lift this ban.

Haiti continues to be the most important export market for Dominican wheat products, accounting for 94% of total exports during MY 2015/16. Other markets for Dominican exports include the U.S., Venezuela and some Caribbean Islands.

The earthquake that struck Haiti in January 2010 had a direct impact on the export growth for wheat and wheat products from Dominican Republic. The only mill in Haiti at that time, *Les Moulins d'Haiti*

(LMH), was destroyed and Dominican mills immediately increased output to supply the neighboring market. Haiti’s annual wheat imports prior to the earthquake totaled approximately 200,000 MT, with the U.S. enjoying around 80% market share. The Dominican milling industry augmented its output between 40-50% (approximately 200,000 MT) in 2010 as a direct consequence of unmet demand in Haiti.

In December 2011, the LMH reopened. Additionally, since 2012 two other mills have started operating. However, Dominican contacts claim that none of the Haitian mills is working at full capacity. Further, those contacts claim that Haitian mills continue to deal with logistical challenges in distributing wheat products outside of Port au Prince. Therefore, the DR continues to supply the Haitian market with substantial amounts of wheat flour and products.

Post forecasts total exports of wheat and wheat products from the DR at 140,000 MT for MY 2016/17, similar to the 150,000 MT estimated for MY 2015/16. Although formal exports reported by the Dominican Government are well below this total, anecdotal reports from industry sources and comparative analysis of local consumption versus imports and mill throughput all, indicate informal trade with Haiti of 30-35,000 MT per year in wheat and wheat products.

1.5. Policy

Within the CAFTA-DR, the Dominican Republic applies no tariffs on the importation of wheat, but there are duties in place on wheat flour (3.73%) and pasta products classified under 1902.19 and 1902.30 (5.33%), along with a value-added tax or VAT¹ of 18% on the latter. In the case of couscous (1902.40), the DR currently applies no tariff, but the product is subject to a VAT of 18%.

1.6. Statistics

Wheat	2014/2015		2015/2016		2016/2017	
Market Begin Year	Jul 2014		Jul 2015		Jul 2016	
Dominican	USDA	New	USDA	New	USDA	New

¹ The DR’s value-added tax or VAT is referred to locally as the ITBIS.

Republic	Official	Post	Official	Post	Official	Post
Area Harvested	0	0	0	0	0	0
Beginning Stocks	66	66	99	74	0	69
Production	0	0	0	0	0	0
MY Imports	573	573	520	550	0	530
TY Imports	573	573	520	550	0	530
TY Imp. from U.S.	462	457	0	350	0	400
Total Supply	639	639	619	624	0	599
MY Exports	140	160	140	150	0	140
TY Exports	140	160	140	150	0	140
Feed and Residual	0	0	0	0	0	0
FSI Consumption	400	405	400	405	0	405
Total Consumption	400	405	400	405	0	405
Ending Stocks	99	74	79	69	0	54
Total Distribution	639	639	619	624	0	599
(1000 HA) ,(1000 MT)						

2. CORN

2.1. Production

Corn production in the Dominican Republic continues to be limited. On average, annual production

totals 35-40,000 MT; mostly produced in the southwest region of the country. Those levels are not expected to change in the near future. Generally, domestic production represents about 3% of total consumption.

The DR also has very little sorghum production (around 3,000 MT annually, according to the Ministry of Agriculture) and imports very little as well. The DR's imports of coarse grains are essentially comprised of yellow corn #2 or its equivalent.

2.2. Consumption

Corn is an important ingredient for the animal feed used in the DR poultry, egg and pork industries. Livestock producers import significant volumes of yellow corn for animal feed, typically around 1.0 million MT on an annual basis. According to trade sources, close to 75% of the corn supply is consumed in broiler and layer production, while swine consume about 20%. The remaining 5% is consumed by cattle, mostly from the dairy sector.

Each year, the country produces nearly 1.2 billion eggs² and 190 million chickens. On a per capita basis, the DR consumes a staggering 70 pounds per year of chicken meat, coupled with approximately 16 pounds per year of pork (83,000 MT in total).

According to Post sources, during CY 2015 the Dominican Republic increased its production of chickens by 5-6 million units. This output was necessary to meet increased demand from the Government's Public Schools Feeding Program. This Program serves approximately 2,800 public schools with extended schedule classes. Local producer associations are also lobbying to include egg consumption in the Feeding Program during CY 2016 and further.

Corn is purchased by a small number of companies and buying groups composed by producers associations. The most important ones are: ASODEP, Pollo Cibao, Consejo, JUPROPE, APROAMLI and MERCASID. Nearly 80% of all corn is imported by these companies.

For 2016/17 Post forecasts total consumption of corn at 1,275,000 MT, similar to the 1,250,000 MT forecasted for 2015/16.

2.3. Stocks

Storage facilities are limited and vary considerably among feed producers. Their collective storage capacity is estimated to be around 120,000 MT, while utilization of storage capacity is normally estimated at around 65-70%.

2.4. Trade

For MY 2016/17 Post forecasts imports of 1,225,000 MT, up from the 1,200,000 MT estimated for MY 2015/16. As mentioned above, the Government's Public Schools Feeding Program will continue to increase its demand for chicken meat and will possibly start demanding eggs. Also, Government social

² It should be noted that while official statistics are not available, it is estimated that approximately one-quarter (25%) of egg production continue to be exported to Haiti informally, in spite of formal restrictions to imports from the Haitian Government on poultry and eggs with Dominican origin.

programs tend to increase during election years. This will possibly mean higher demand of poultry products during the first five months of CY 2016.

Historically, the United States has dominated the corn market in the Dominican Republic, enjoying close to 100% market share until MY 2008/09. Since that year, persistent complaints concerning dust levels, grain cracking, mycotoxins presence, availability and shipping challenges and relatively higher prices led many importers to source South American supplies, specifically from Brazil and Argentina. Even though this trend reversed itself during MY 2013/14, US market share declined during MY 2014/15 to only 48% of imported corn. Post expects US market share to continue its decline during MY 2015/16 and MY 2016/17 due to higher quality and increased availability of Brazilian corn. It is worth mentioning that in the current market, Dominican importers are willing to pay a premium, in some cases up to US\$5/MT, for South American corn.

DOMINICAN REPUBLIC CORN IMPORTS BY PARTNER, MY 2011-2015 (MT)*

Country	MY 10/11	MY 11/12	MY 12/13	MY 13/14	MY 14/15
Reporting Total	999,402	1,054,155	1,045,623	1,010,288	1,201,537
Brazil	163,921	528,895	503,275	328,551	457,803
United States	718,302	328,641	85,090	600,145	575,969
Argentina	117,166	173,596	319,555	66,500	135,896
Canada	13	2	0	0	4
South Africa	0	0	0	0	24
Mexico	0	0	2		
Paraguay	0	23,019	137,700	15,000	31,841
Spain	0	2	1	0	0
India	0	0	0	92	0

* HS heading 1005.

Source: Build by Post with reports from GTA, GATS-USDA

Brazil continues to be the strongest competitor for corn to the DR market. During MY 2014/15 Brazil exported 38% of the total Dominican import volumes. Post forecasts increased exports from Brazil during MY 2016/17. Argentina also increased their volume of corn exports to the DR, exporting 135,896 MT during MY 2014/15, up from just 66,500 MT during MY 2013/14.

Dominican exports of corn have not been significant. According to the National Office of Statistics (ONE), the Dominican Republic exported approximately 2,000 MT of corn during MY 2014/15; 98% of that total was destined for Haiti. Imported yellow corn that is not used in the production of animal feed is milled to produce corn meal and corn grits for both domestic consumption and export. The export total for both products (HS 1102 and 1103) during MY 2014/15 was approximately 44,000 MT. Some Dominican companies export these products to Haiti (through both formal and informal channels) and other markets throughout the region. Similarly, there are small amounts of corn-based animal feed products being exported to Cuba and other islands in the Caribbean.

2.4. Policy

As corn (along with soybean meal) constitutes one of the primary inputs in feed formulations, it is exempt from import duties in order to reduce costs for producers. Additionally, corn imports are not subject to the value-added tax (VAT).

As part of the DR’s commitments at the World Trade Organization (WTO), the country included corn among the agricultural products comprising the Technical Rectification (TR). Specifically, as part of its WTO commitments under the TR following the Uruguay Round, the Government of Dominican Republic established an initial tariff-rate quota (TRQ) of 703,000 MT for corn that increased gradually to 1,091,000 MT as of 2004. Although the DR has a bound out-of-quota tariff rate of 40%, this tariff is not applied. According to the Decree 569-12 the Government will not apply the out-of-quota rate in corn imports.

The Decree 569-12 also included corn in the Automatic License System for the adjudication of the quota; which means that the import process is expedited for importers.

At the present time, the DR has legislation in place which requires every corn importer to purchase locally produced sorghum. Specifically, the National Corn and Sorghum Commission (CNMS is the Spanish acronym) requires the purchase of 5% of national sorghum production in exchange for the importation of corn. According to officials at the Ministry of Agriculture, the 5% figure applies regardless of the amount of corn imported.

Finally, it is worth noting that the DR does not currently restrict imports of GE commodities. Although the country has signed and ratified the Cartagena Protocol, the country’s regulatory framework still awaits congressional approval and has not yet been implemented. For imports of corn used as propagation material the DR does have a rule in place that requires that the phytosanitary certificate accompanying the shipment state that said product “does not contain GMO material”.

2.5. Statistics

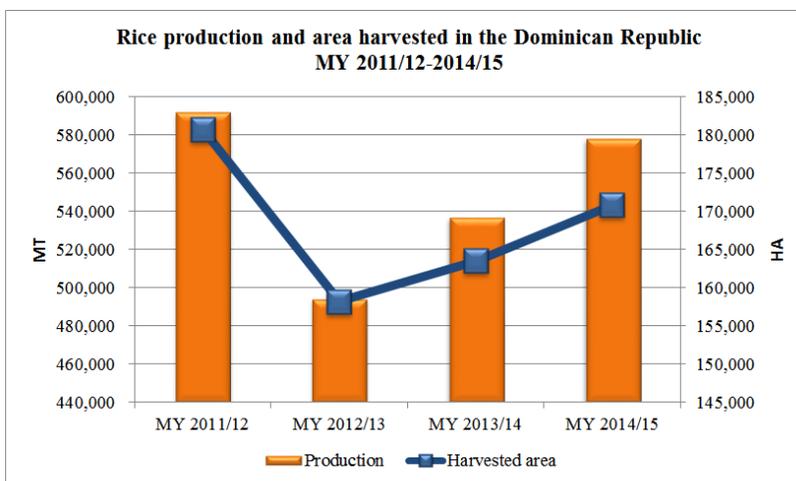
Corn	2014/2015		2015/2016		2016/2017	
Market Begin Year	Oct 2014		Oct 2015		Oct 2016	
Dominican Republic	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	29	29	29	29	0	30

Beginning Stocks	106	106	223	141	0	134
Production	45	35	45	45	0	50
MY Imports	1202	1202	1100	1200	0	1225
TY Imports	1202	1202	1100	1200	0	1225
TY Imp. from U.S.	576	576	0	550	0	530
Total Supply	1353	1343	1368	1386	0	1409
MY Exports	5	2	5	2	0	2
TY Exports	5	2	5	2	0	2
Feed and Residual	1025	1100	1025	1150	0	1175
FSI Consumption	100	100	100	100	0	100
Total Consumption	1125	1200	1125	1250	0	1275
Ending Stocks	223	141	238	134	0	132
Total Distribution	1353	1343	1368	1386	0	1409
(1000 HA) ,(1000 MT)						

3. RICE

3.1. Production

Rice is one of the most important agricultural products Dominican Republic due to its



Source: Build by Post with reports from the Ministry of Agriculture of the Dominican Republic

in the

political, economic and social impact on Dominican society. According to national estimates, the country has approximately 30,500 rice producers, nearly 250,000 people are involved in the production, processing and marketing of rice, and the sector contributes approximately 5% to Agricultural Gross Domestic Product.

Post forecasts a harvested area for rice of approximately 140,000 HA during MY 2016/17, less than the 150,000 HA projected during MY 2015/16. This continued reduction will likely come as a consequence of a severe drought that has affected the country during the last 2-3 years, reducing the availability of irrigated production areas. Rice is produced in two cycles during the year and recently, due to the use of short cycle varieties, a growing share of production is harvested in the May second crop (now almost 25% of total harvest).

Most Dominican rice is produced under irrigation. According to Post sources, rice under irrigation accounts for 99% of the total area.

During MY 2016/17 Post forecasts “rough” rice production to be 791,000 MT and milled production at 530,000 MT, down 10,000 MT from MY 2015/16. Production will continue to decline due to reduced availability of irrigated production area and the continued high level of stocks managed by the Government.

The average yield has varied between 4-5 MT/HA over the last ten years. Post sources expect yields to remain in this range in coming years, due to lack of development of new varieties and/or production technologies.

3.2. Consumption

Rice is one of the most important products in the basic consumer basket. For MY 2016/17, consumption is forecast at 560,000 MT, similar to MY 2015/16. Rice consumption has averaged 566,000 MT during the last four market years, but has fluctuated significantly during the period.

DOMINICAN REPUBLIC RICE APPARENT CONSUMPTION, MY 2012-2015

Market Year	Population (millions)	Production (1000 MT)	Initial Stocks (1000 MT)	Imports (1000 MT)	Exports (1000 MT)	Ending Stocks (1000 MT)	Consumption (1000 MT)	Per capita (Pound/habitant)
2011/12	10,190.50	591	318	8	40	218	659	142
2012/13	10,322.90	494	218	12	10	214	500	107
2013/14	10,436.40	536	214	19	17	206	546	115
2014/15	10,540.76	577	205	19	18	224	560	120
Average	10,372.64	550	239	15	21	216	566	121

Source: Build by Post with reports from the Ministry of Agriculture of the Dominican Republic, ONE, Central Bank and Post estimates.

In per capita terms, Dominicans consumed 120 pounds each in MY 2014/2015, slightly less than the average consumption of 121 pounds per capita during MY's 2012-2015. No significant changes in rice consumption trends are expected in the near future.

3.3. Stocks

Post forecasts stock levels to decline to 178,000 MT during MY 2016/17. This forecast is significantly lower than the 4-market year annual average of 216,000 MT, but still equal to 32% of consumption. Storage facilities are owned by both private processors (mills) and the Government.

Stock levels tend to be high as a result of the GoDR *Pignoracion Program*; according Post sources, 80% of stocks are maintained under that program, which is further explained in section 3.5 (below).

3.4. Trade

Both imports and exports by the Dominican Republic are limited. The country has been self-sufficient in rice in the last several years, and most rice imports come from the US (100% of the MY 2014/15 total) thanks to a TRQ established in the CAFTA-DR agreement. Since rice is included in Basket V of the DR-CAFTA agreement (explained in section 3.5 below), out-of-quota rice imports currently pay a duty of 91.08%, effectively pricing them out of the market.

For MY 2016/17 Post forecast imports of 15,000 MT, similar to the 17,000 MT projected for MY 2015/16.

Dominican rice is exported on rare occasions; mainly to Haiti. For MY 2016/17 Post forecasts exports of 12,000 MT, slightly less than the 16,000 MT estimated for MY 2015/16. Occasional spikes in exports occur due to saturation of the local market and price decreases.

3.5. Policy

Under the CAFTA-DR, the Dominican Republic negotiated that rice be placed in Basket V, which concedes a longer-term tariff reduction period-- 20 years—as well as establishing a 99% out-of-quota tariff rate. This non- quota tariff rate will remain unchanged during the first 10 years of the Agreement, until 2015. From 2016 to 2020 the non- quota tariff rate will be reduced by 8% annually, and from years 2021 to 2025 by 12% annually. Currently, the non-quota tariff rate for rice is 91.08%. Additionally, the DR negotiated a special safeguard with an additional tariff rate. This special safeguard can be applied until the end of the tariff reduction period.

Price controls are established via the *Pignoracion Program*, which operates during 8 months of the year. The National Rice Commission (CONA) establishes a yearly price band (for paddy rice, FOB mill). The CONA is composed of the MoA, producers, processors, retailers and other public institutions. Price bands are established both annually and for each of the two harvest periods (May and September), based on historic prices, varieties and production estimates. For millers, purchasing according to CONA price bands is not obligatory, but it is a requirement for participation in the *Pignoracion Program*.

In general terms, the *Pignoracion Program* is a financial services program benefiting rice producers and processors. Under the program, processors (factories, cooperatives, etc.) or producers buy or produce rice, then mill and either market the rice or hold it in storage. If held in storage, this rice can be pledged as collateral for loans from commercial or public lending institutions. For participants in the *Pignoracion Program* the cost of storage, interest and insurance costs are covered by the Government (MoA).

As rice constitutes one of the primary feed sources for the population, it is exempt from value-added tax (VAT).

For more information on the Pignoracion Program, please review our 2014 Report: “Dominican Republic Governmental Support for the Rice Sector” available on

http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Dominican%20Republic%20Governmental%20Support%20for%20the%20Rice%20Sector%20_Santo%20Domingo_Dominican%20Republic_4-2-2015.pdf.

3.6. Statistics

Rice, Milled	2014/2015		2015/2016		2016/2017	
Market Begin Year	Jul 2014		Jul 2015		Jul 2016	
Dominican Republic	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	162	170	160	150	0	140
Beginning Stocks	206	206	199	224	0	205
Milled Production	538	577	520	540	0	530
Rough Production	803	861	776	806	0	791
Milling Rate (.9999)	6700	6700	6700	6700	0	6700
MY Imports	15	19	15	17	0	15
TY Imports	15	19	15	17	0	15
TY Imp. from U.S.	14	19	0	16	0	15
Total Supply	759	802	734	781	0	750
MY Exports	0	18	0	16	0	12
TY Exports	0	18	0	16	0	12
Consumption and Residual	560	560	550	560	0	560

Ending Stocks	199	224	184	205	0	178
Total Distribution	759	802	734	781	0	750
(1000 HA) ,(1000 MT)						