

FAPRI 2006

Preliminary Baseline

December 15-16, 2005



INTERNATIONAL OILSEEDS



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FAPRI

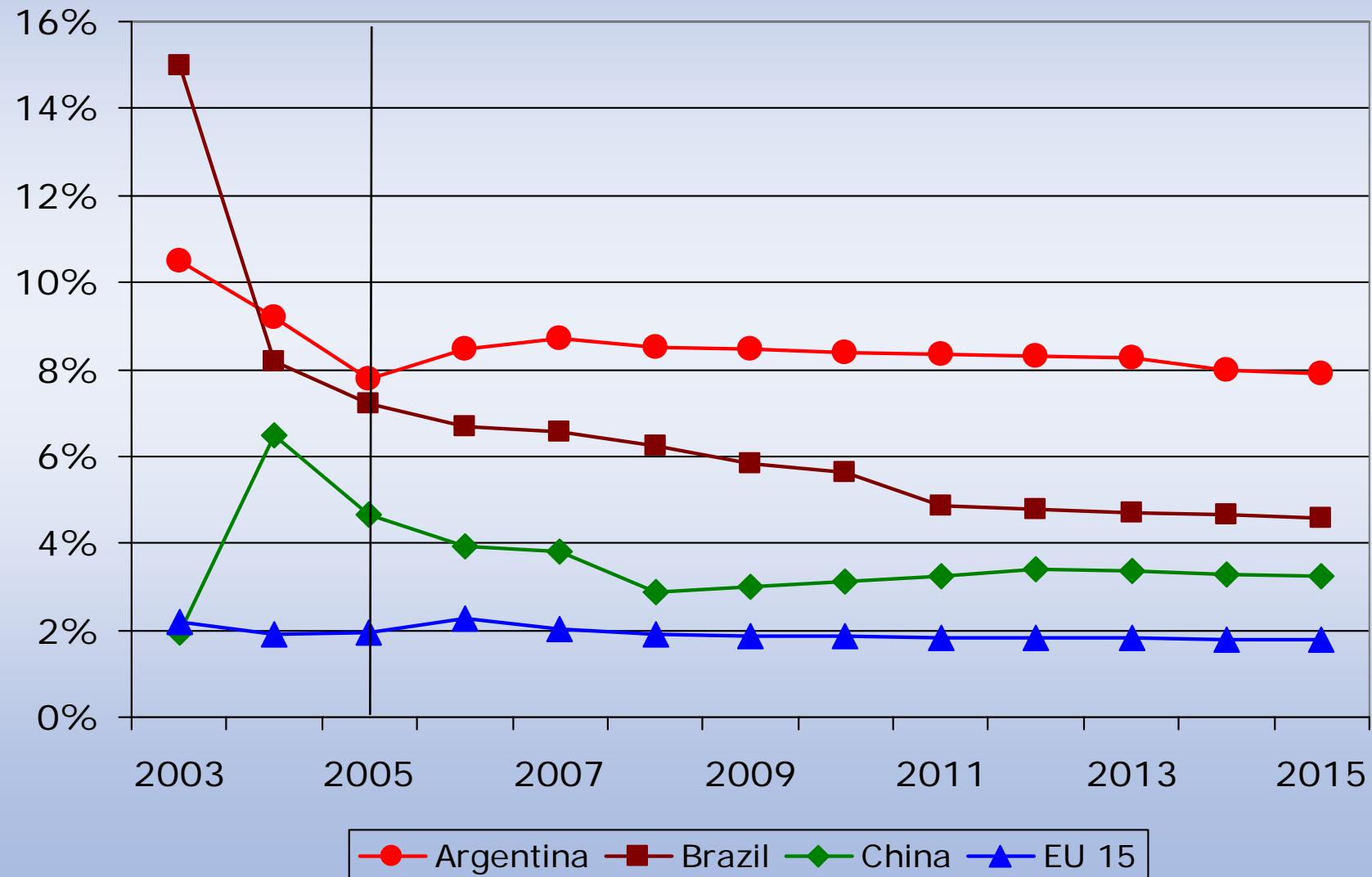
**Food and Agricultural
Policy Research Institute**

Center for Agricultural and Rural Development
Iowa State University, Ames, Iowa 50011-1070
(515)294-1183 <http://www.fapri.iastate.edu>

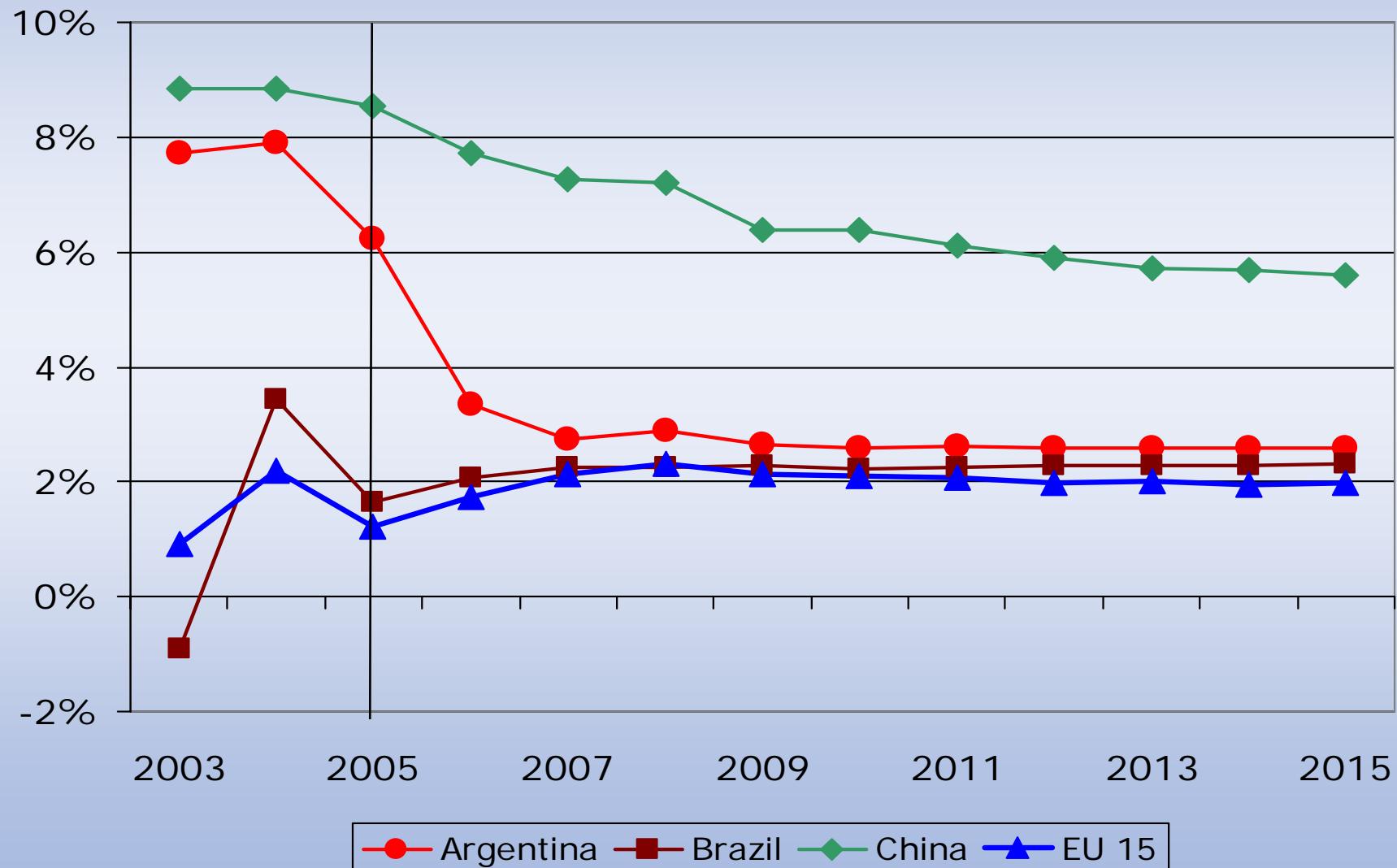
International Macroeconomic Outlook

- Percent Growth of GDP Deflator
- Real GDP Growth Per Capita
- Percent Change in Exchange Rate
- Argentina, Brazil, China and EU-15

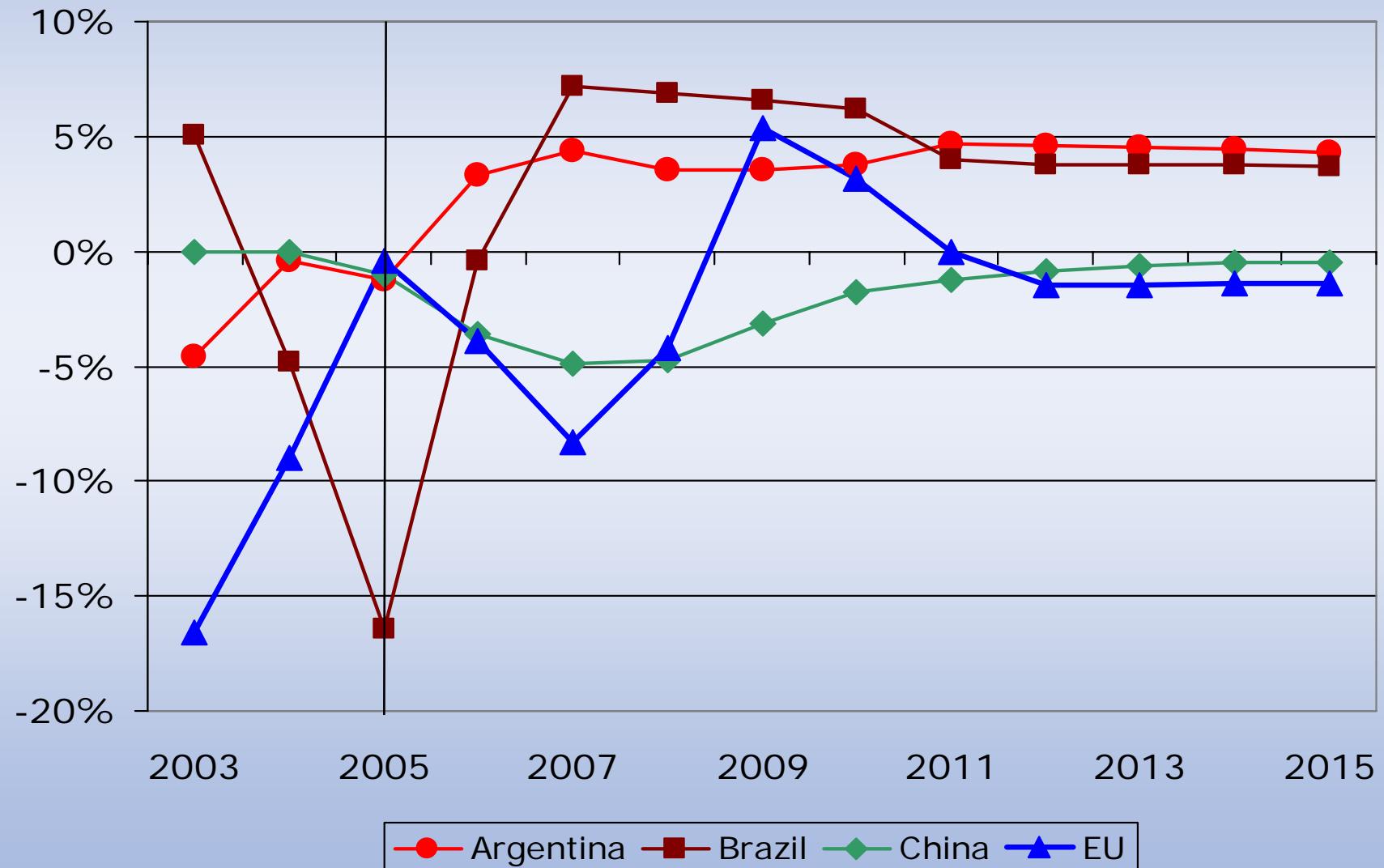
Percent Growth of GDP Deflator



Real GDP Growth Per Capita



Percent Change in Exchange Rate

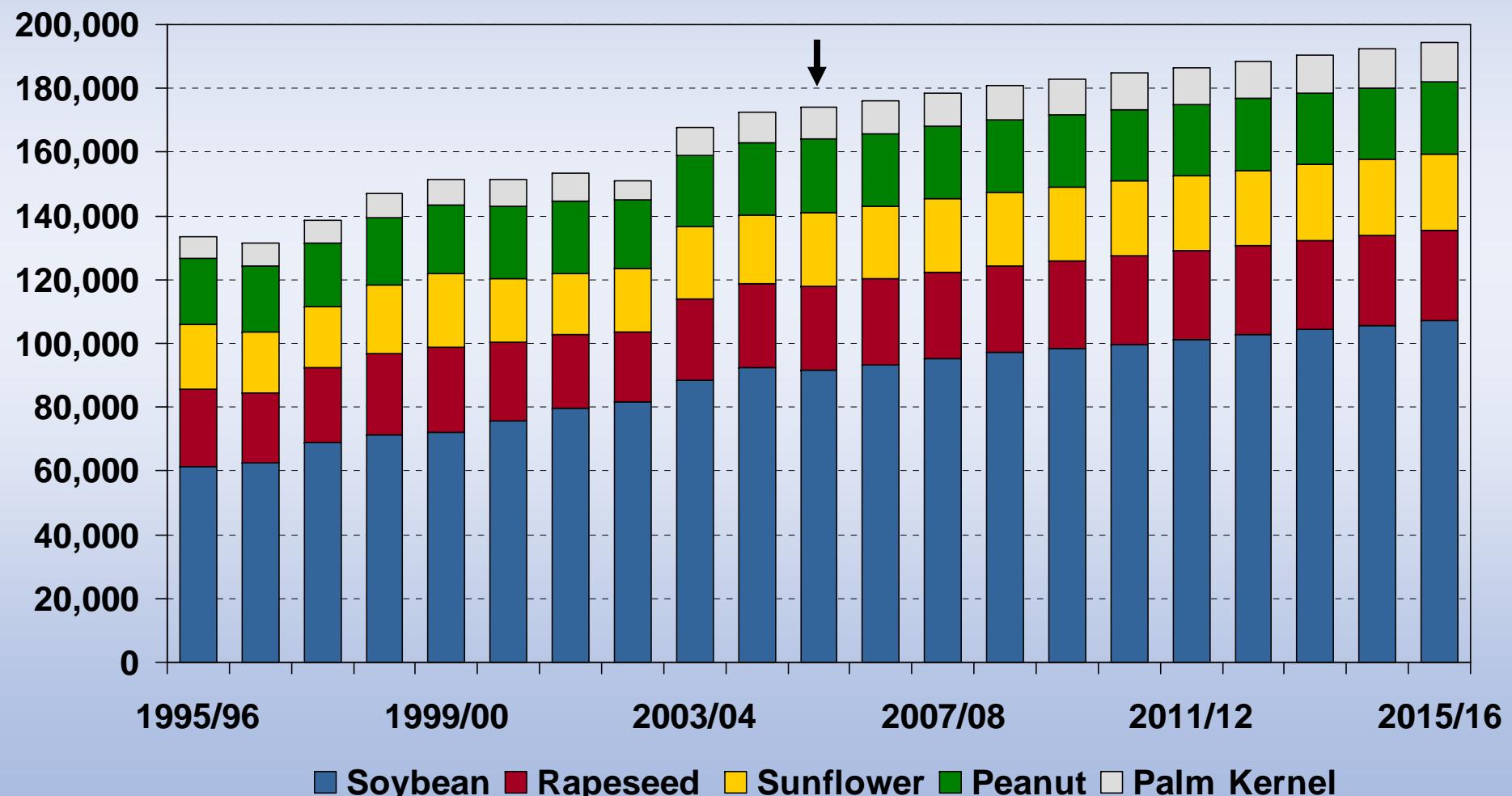


International Oilseeds Outlook

- World
- South America
- China
- European Union
- Canada
- Commonwealth of Independent States (CIS)
- Palm Oil

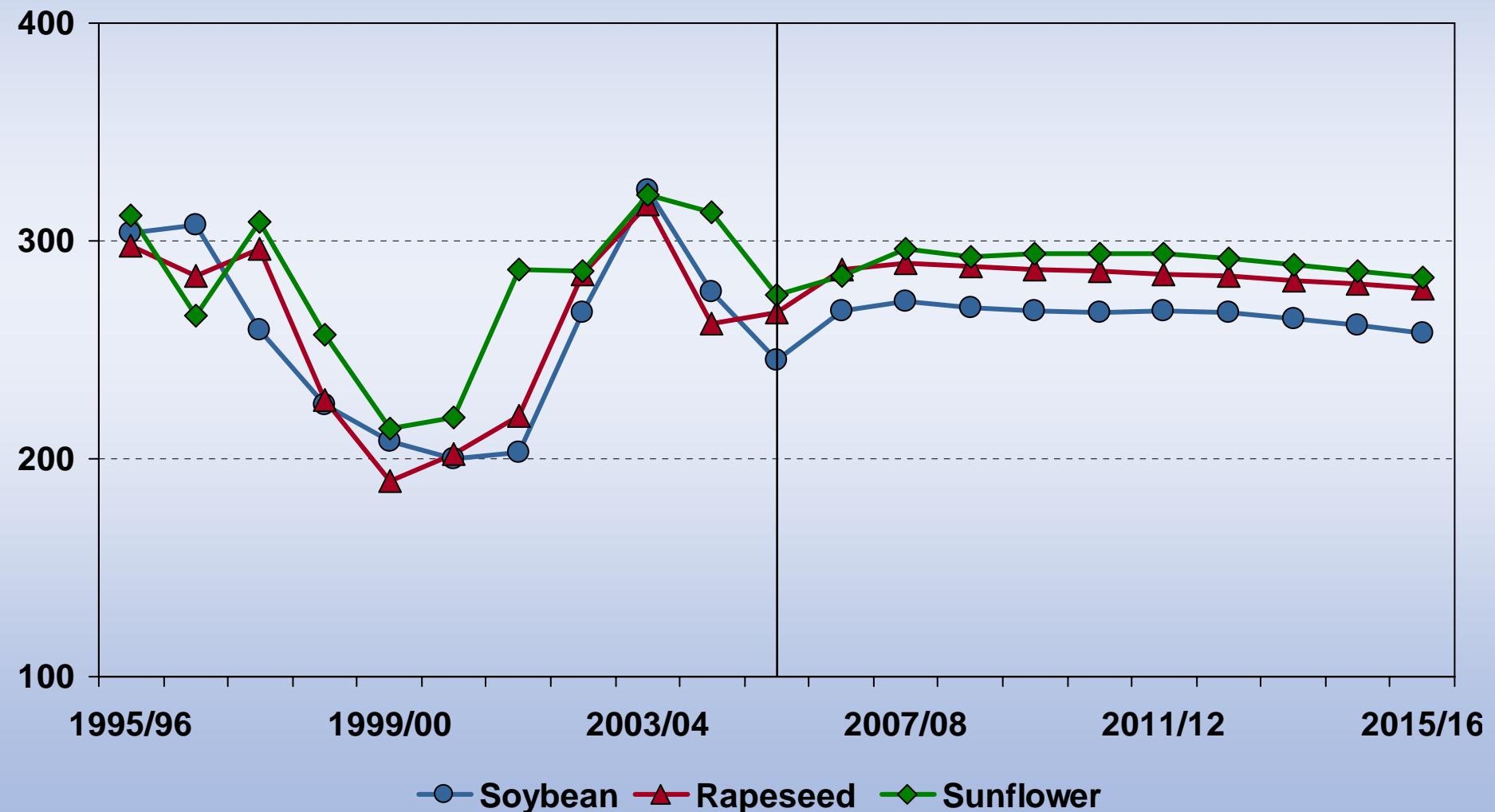
World Oilseed Area

Thousand Hectares



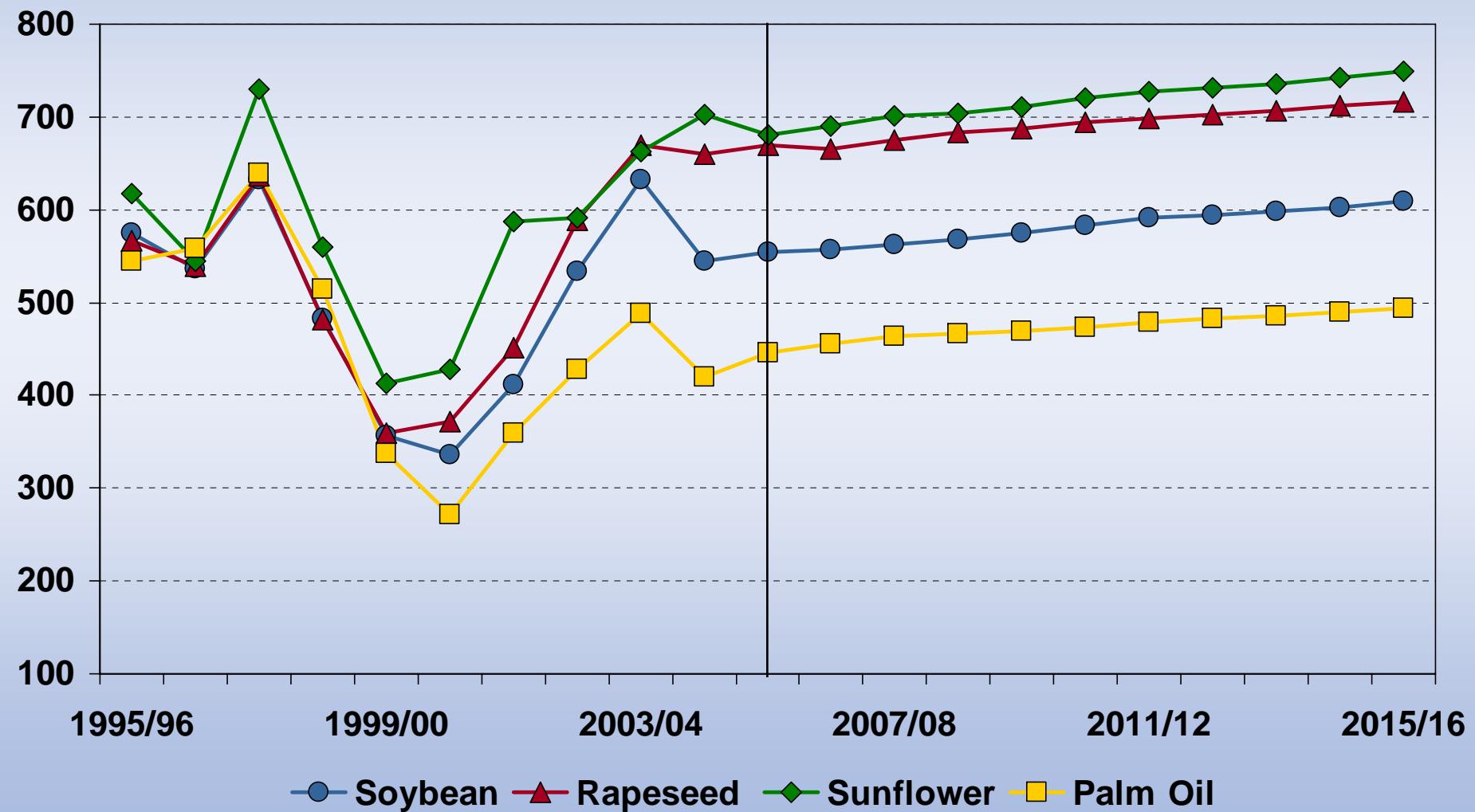
World Oilseed Prices (CIF Rotterdam, Hamburg)

Dollars per MT



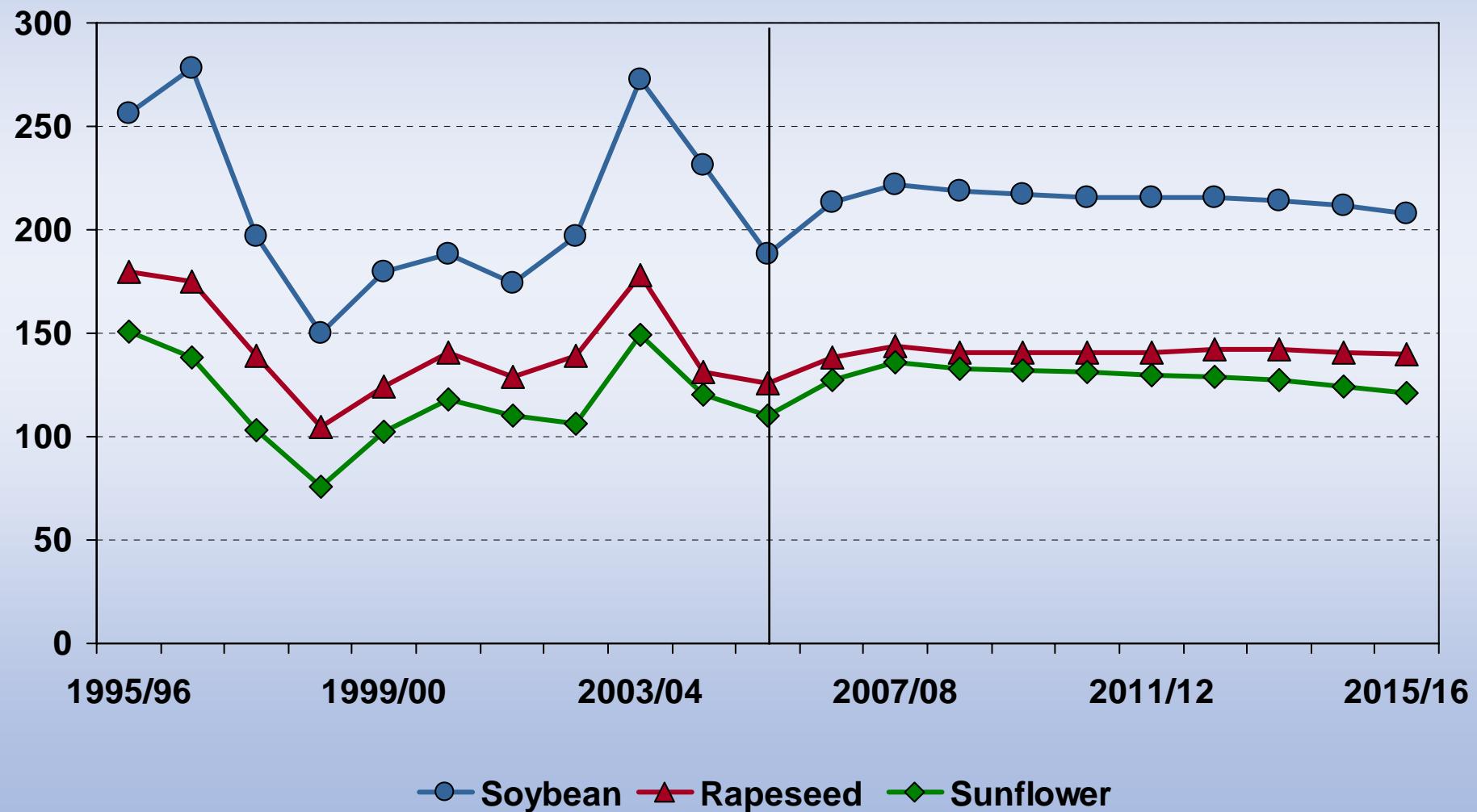
World Vegetable Oil Prices (FOB Rotterdam, Hamburg)

Dollars per MT



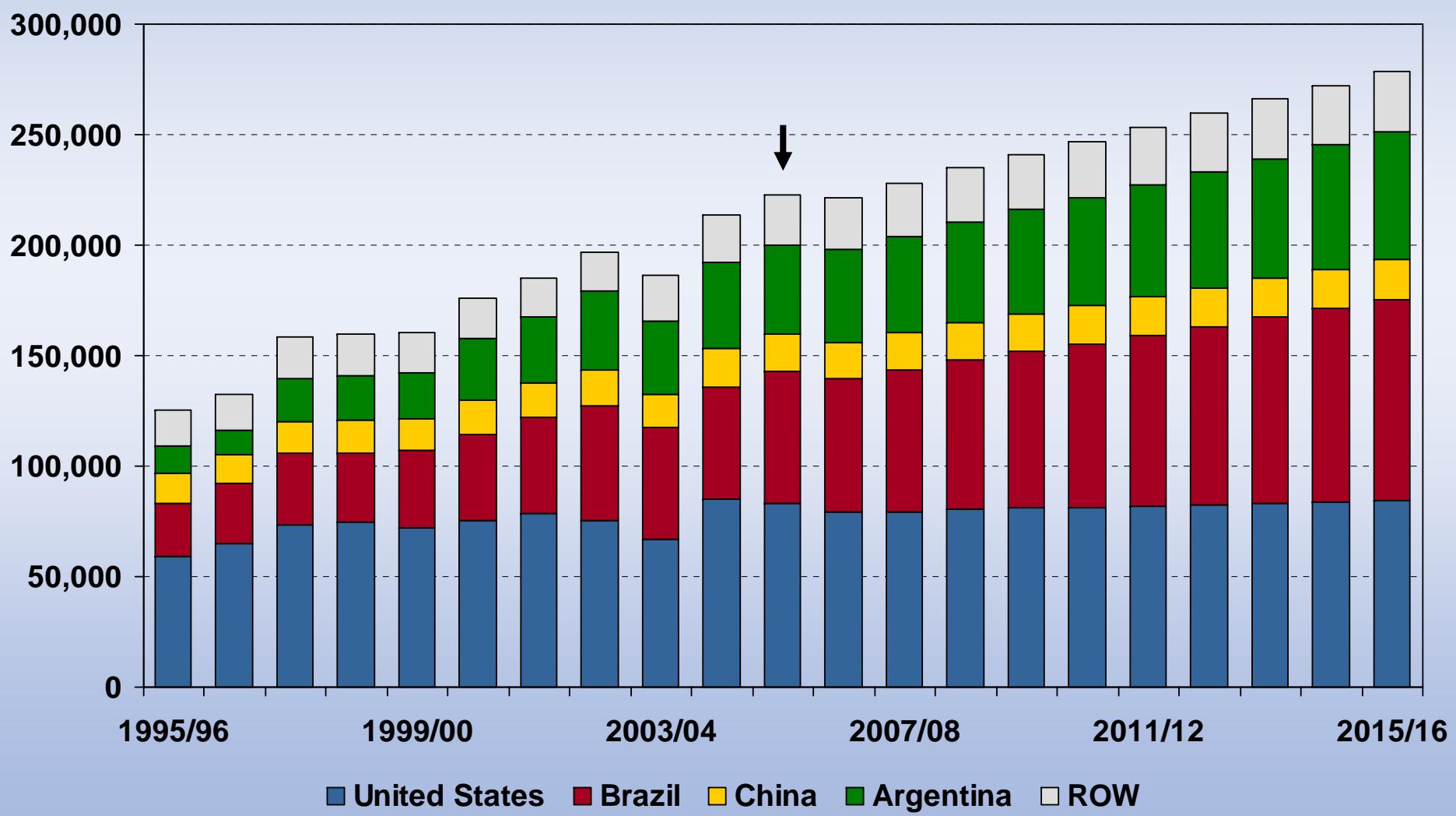
World Protein Meal Prices (CIF Rotterdam, FOB Hamburg)

Dollars per MT



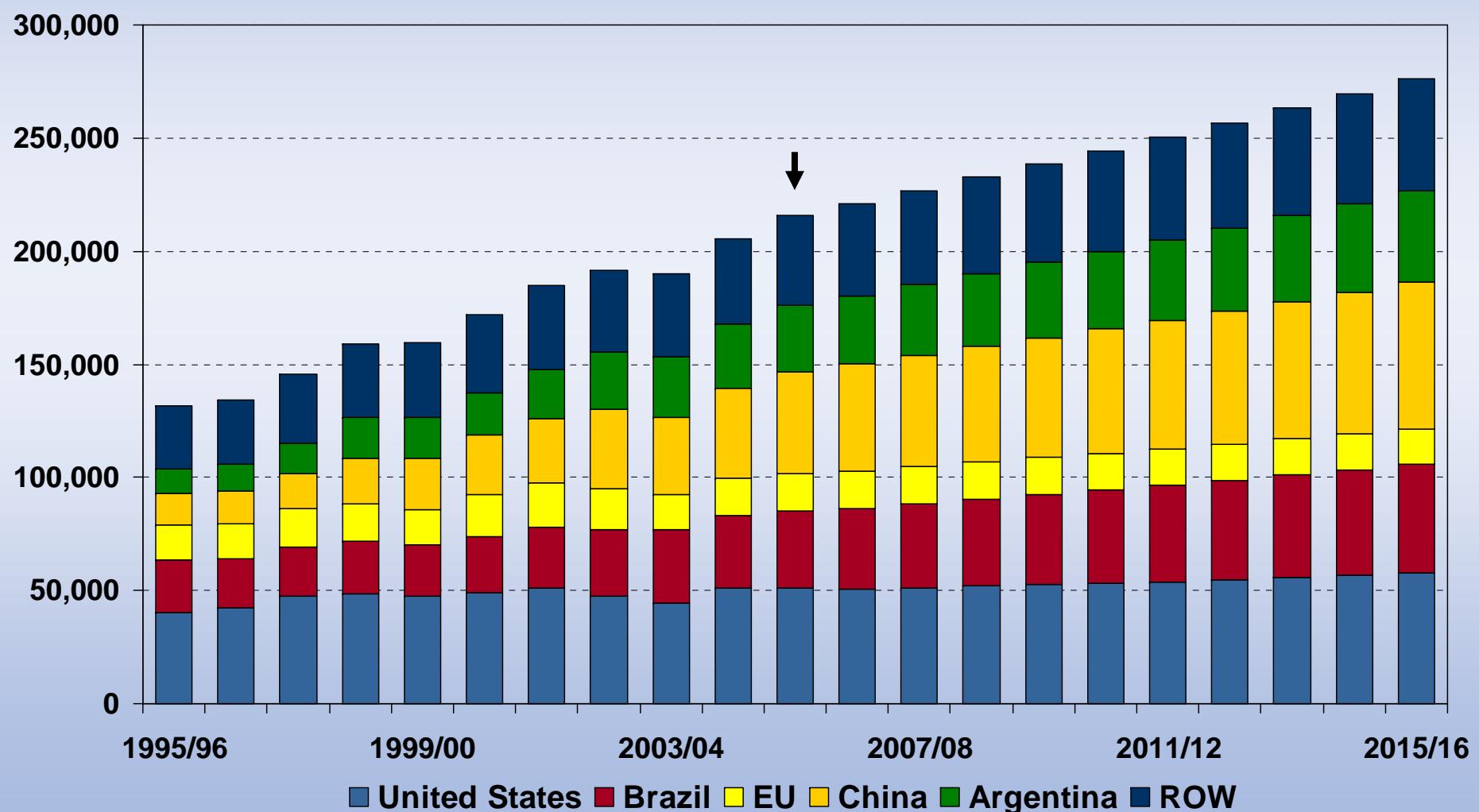
World Soybean Production

Thousand MT



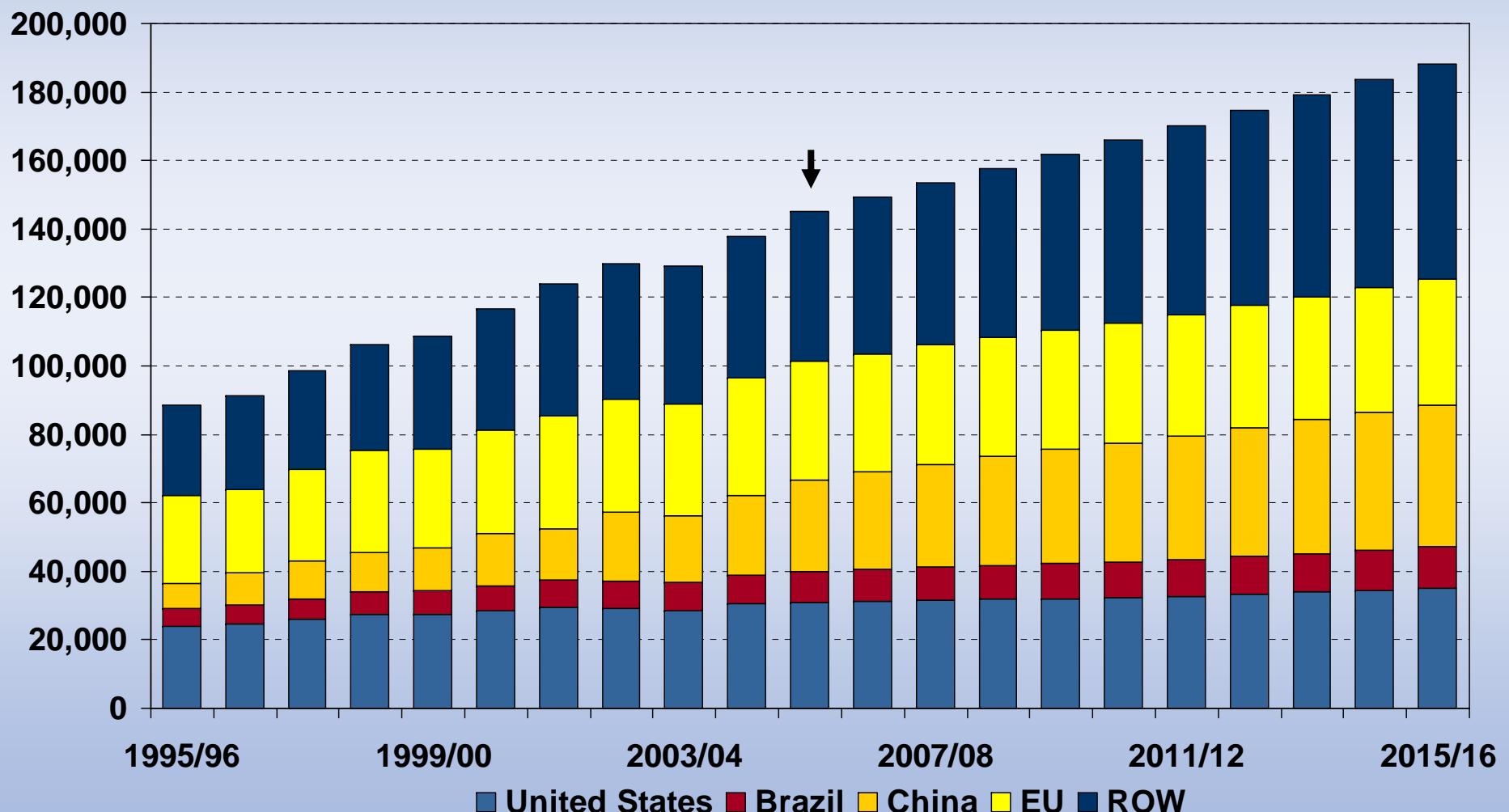
World Soybean Consumption

Thousand MT



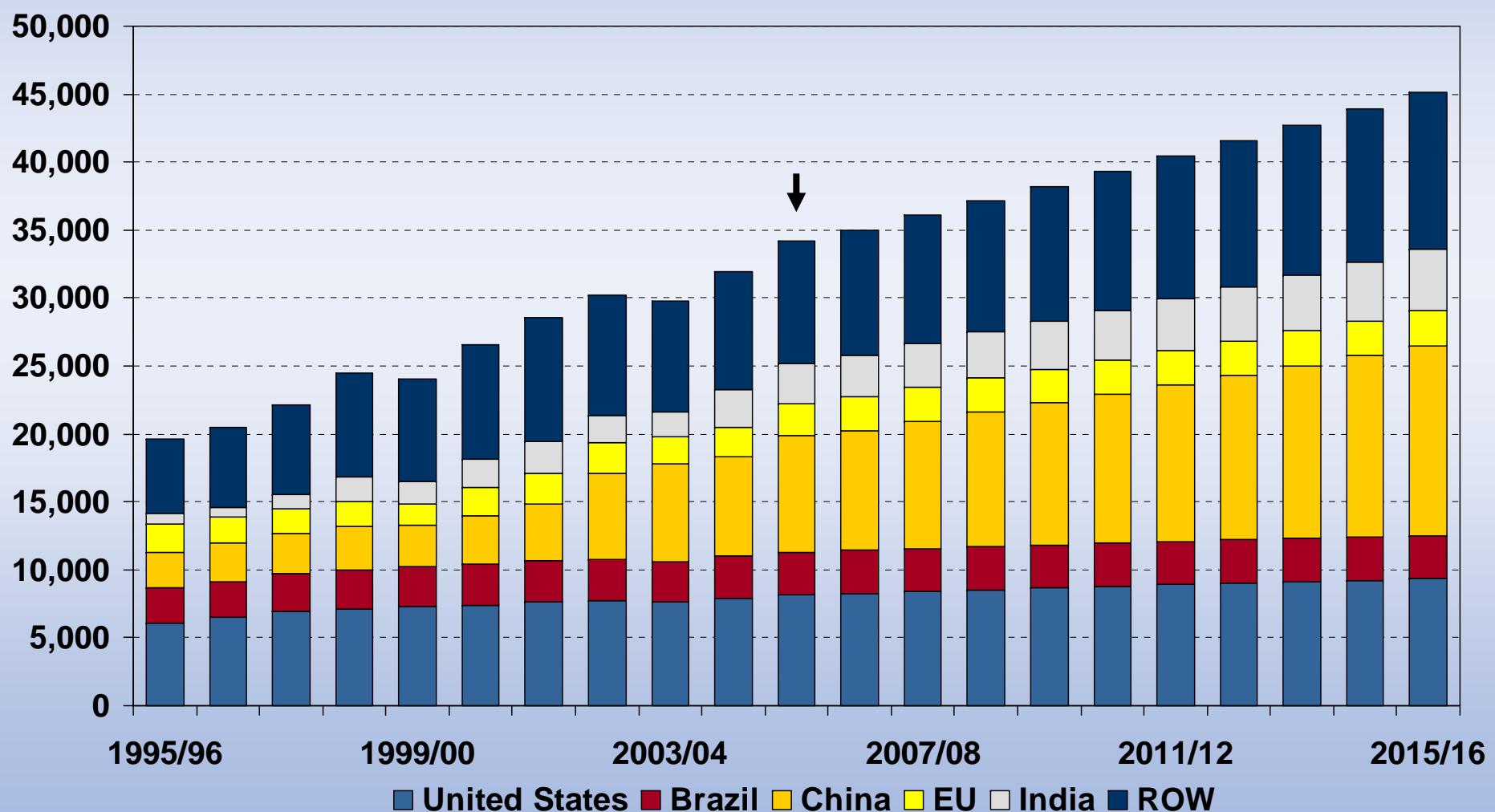
World Soybean Meal Consumption

Thousand MT



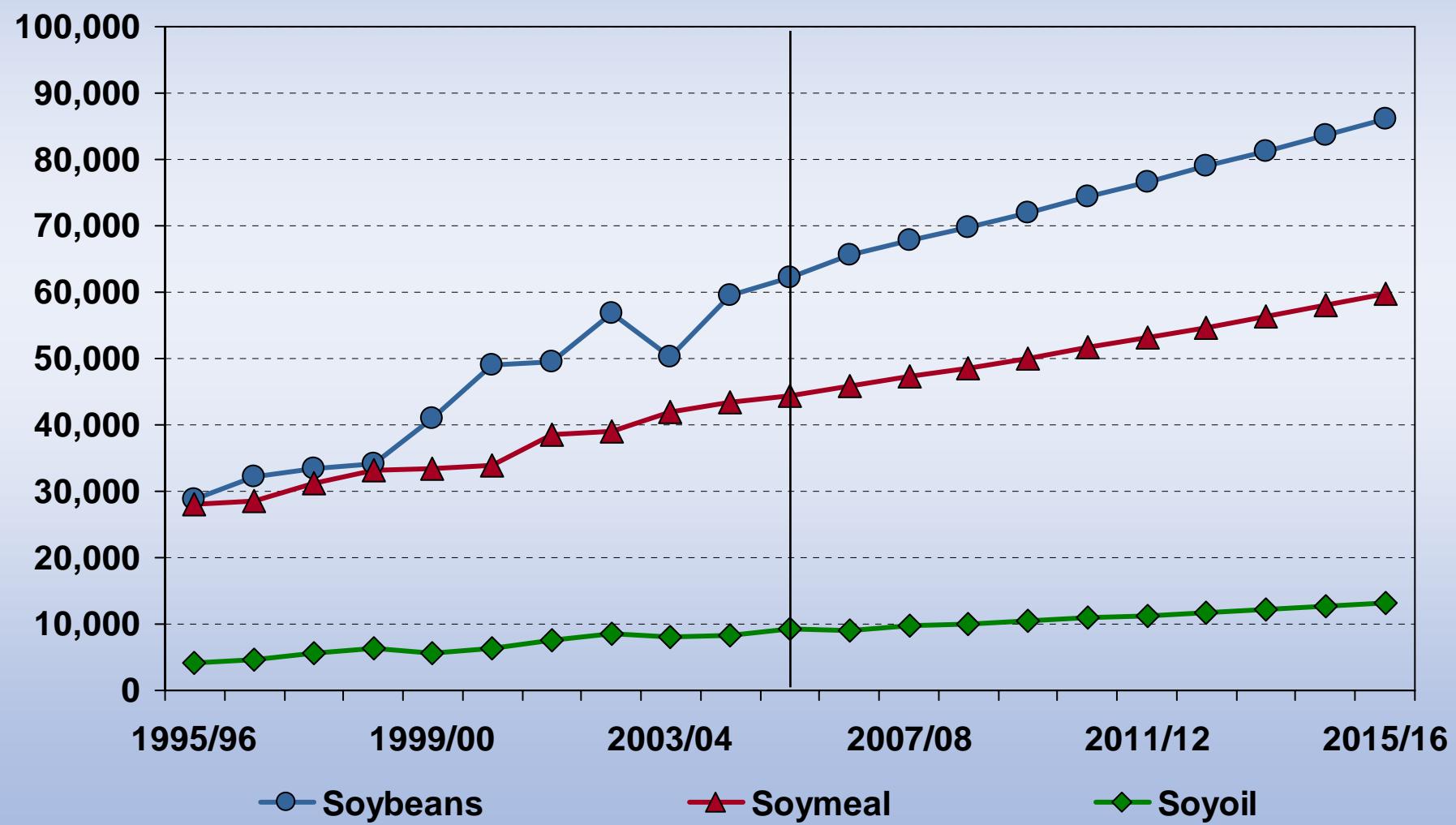
World Soybean Oil Consumption

Thousand MT



World Soybean Sector Net Trade

Thousand MT



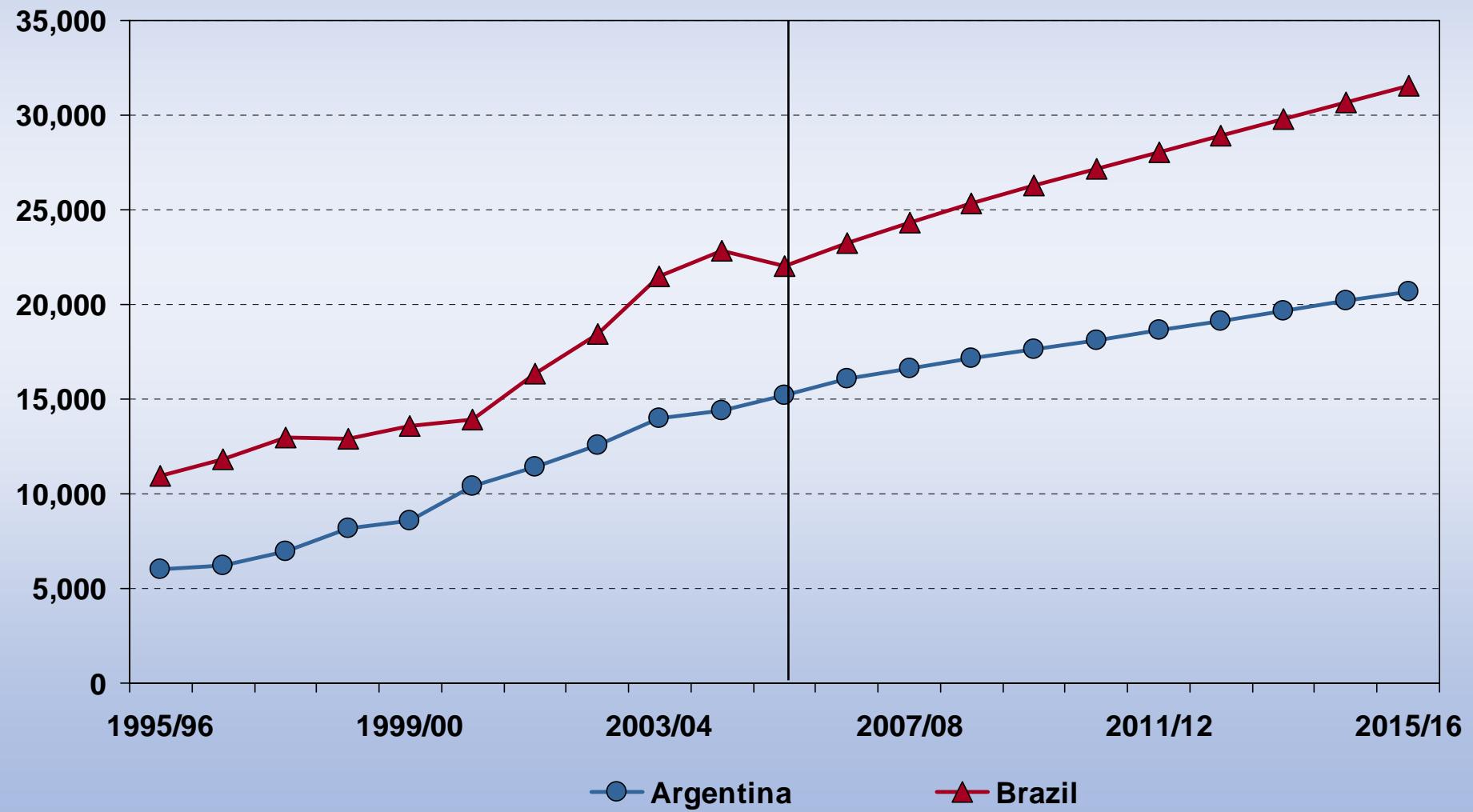
Argentina and Brazil

- Soybean area expansion
- Development of soybean yields
- Domestic crush and export of soybeans
- Domestic utilization of soybean meal

- Argentina's sunflower sector
 - Area development
 - Seed and meal exports

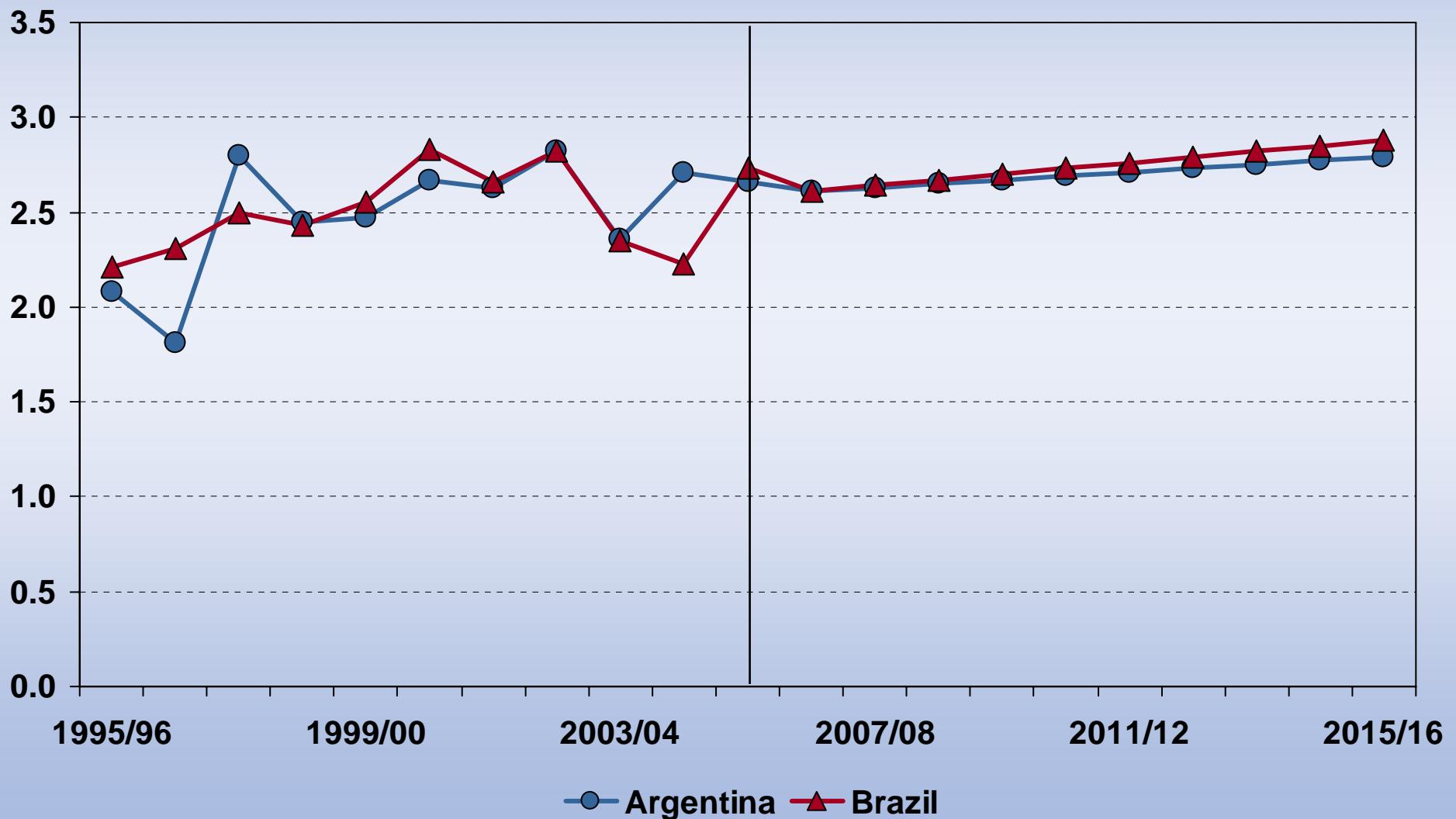
Soybean Area in Argentina and Brazil

Thousand Hectares

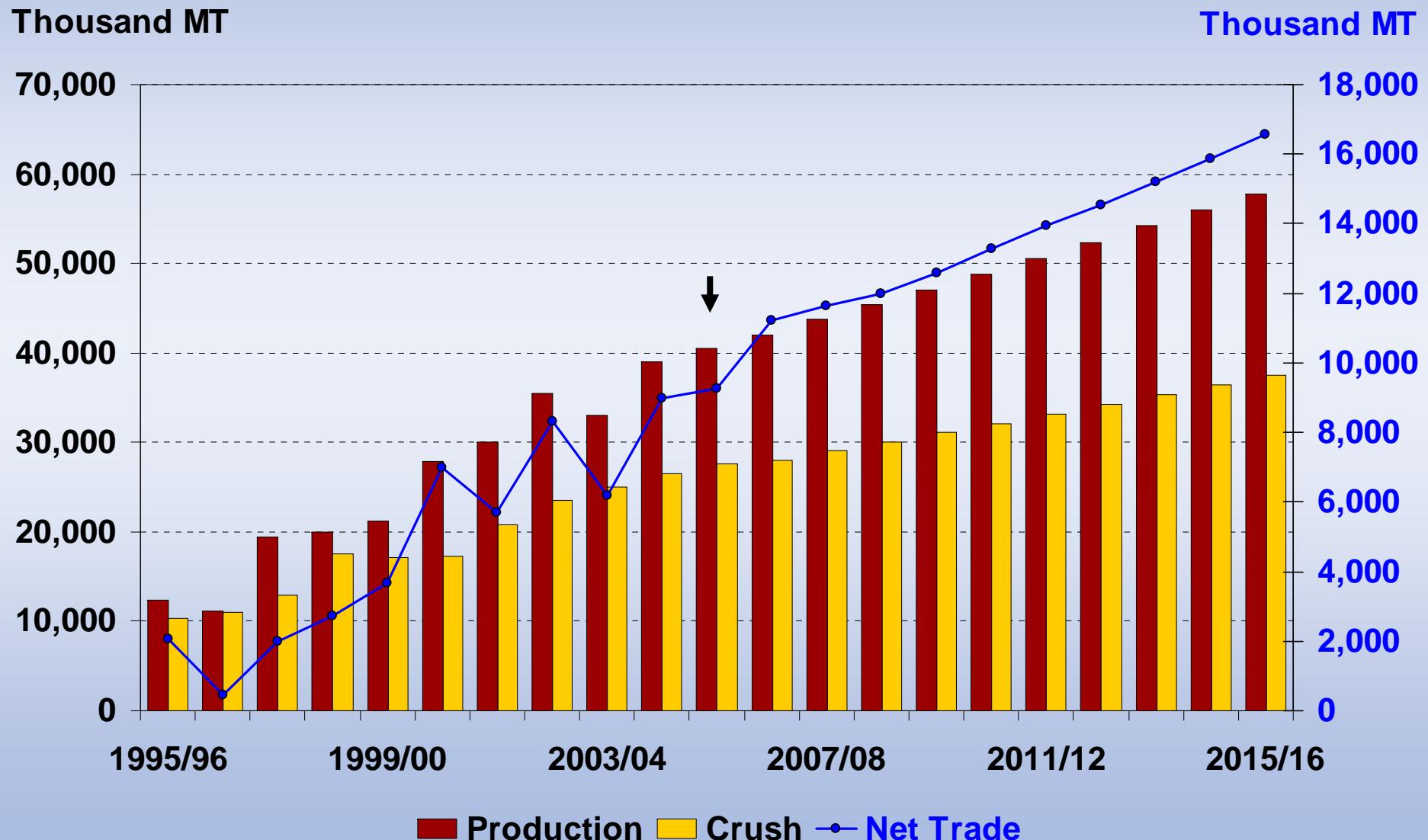


Soybean Yields in Argentina and Brazil

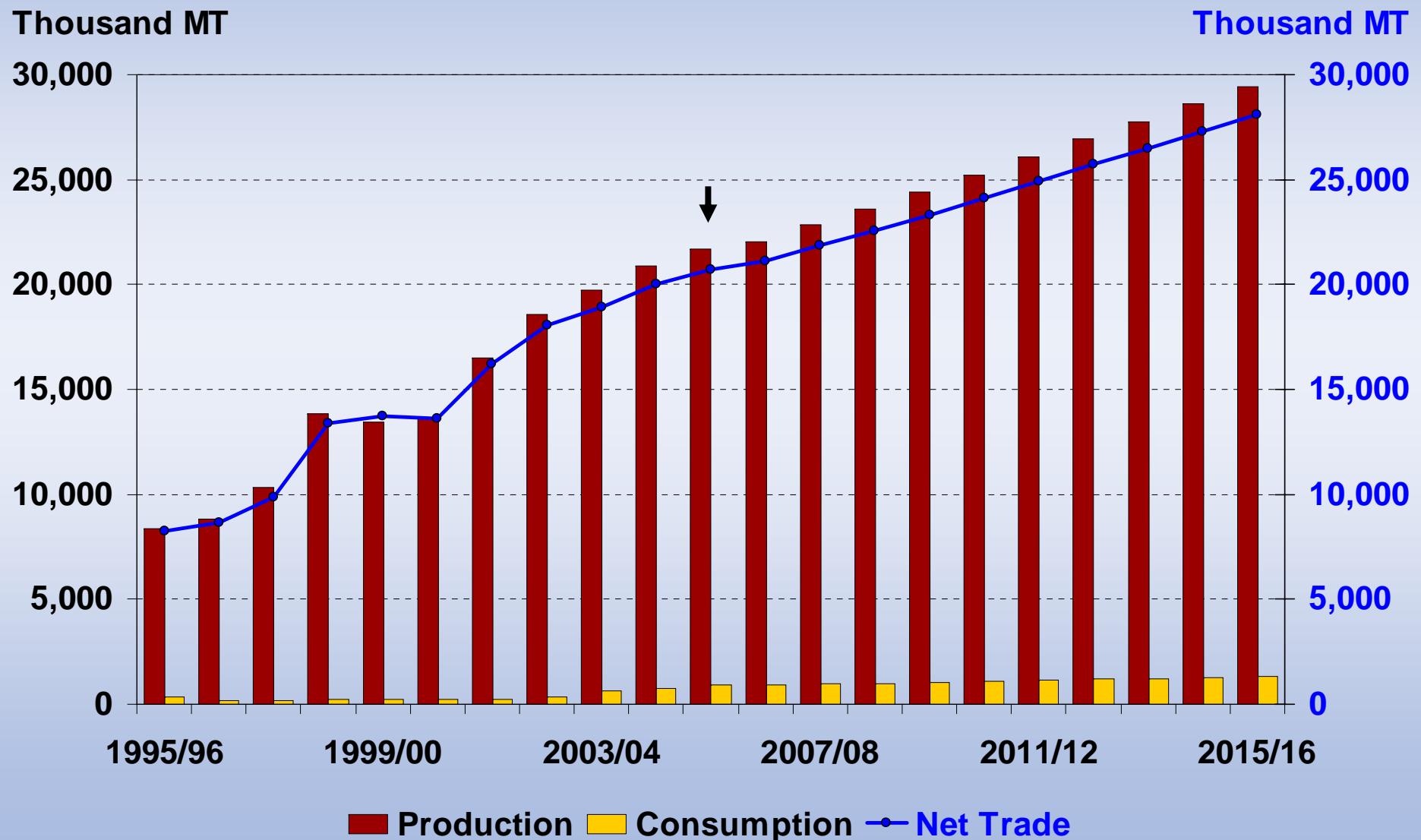
MT per Hectare



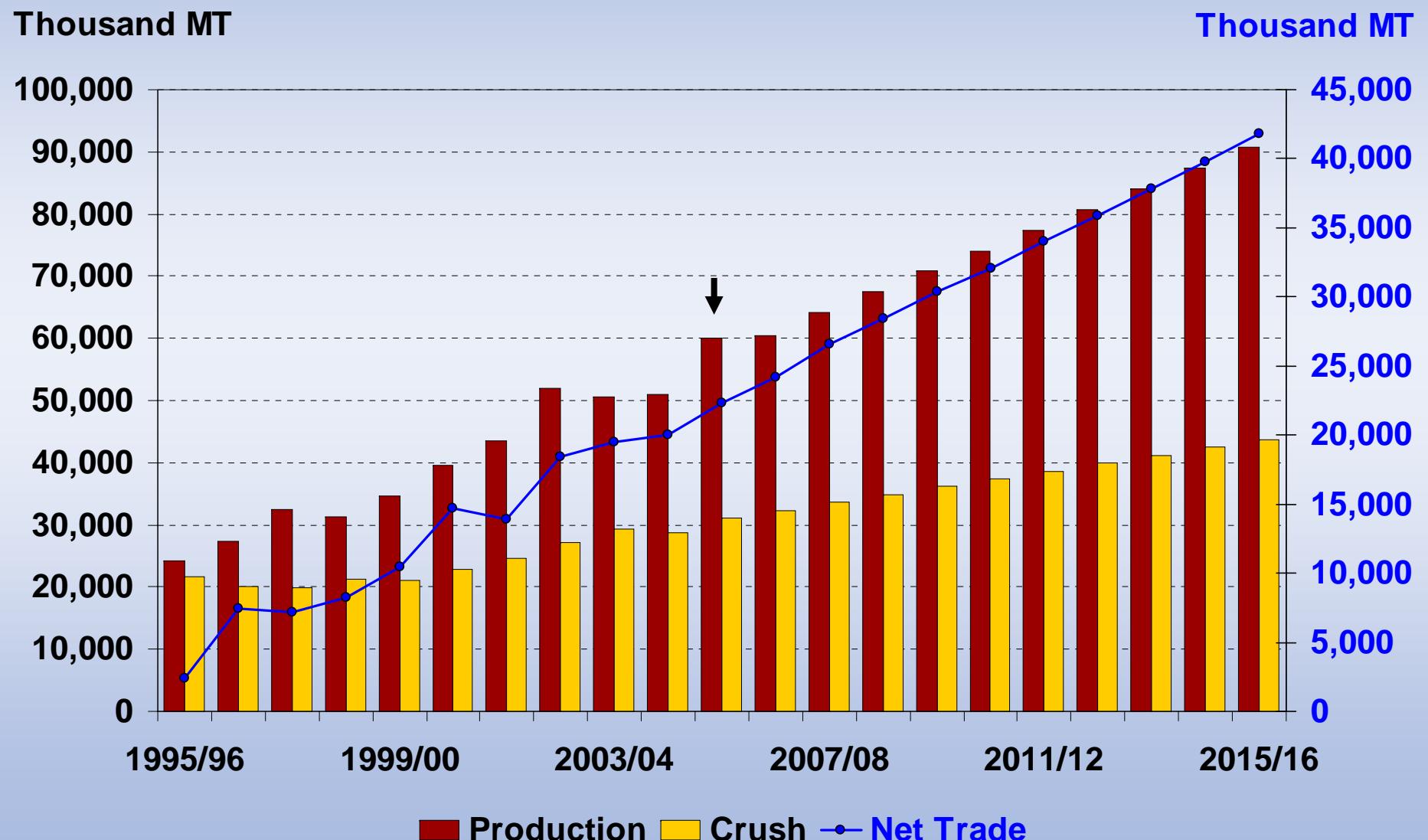
Argentine Soybean Production, Crush, and Net Trade



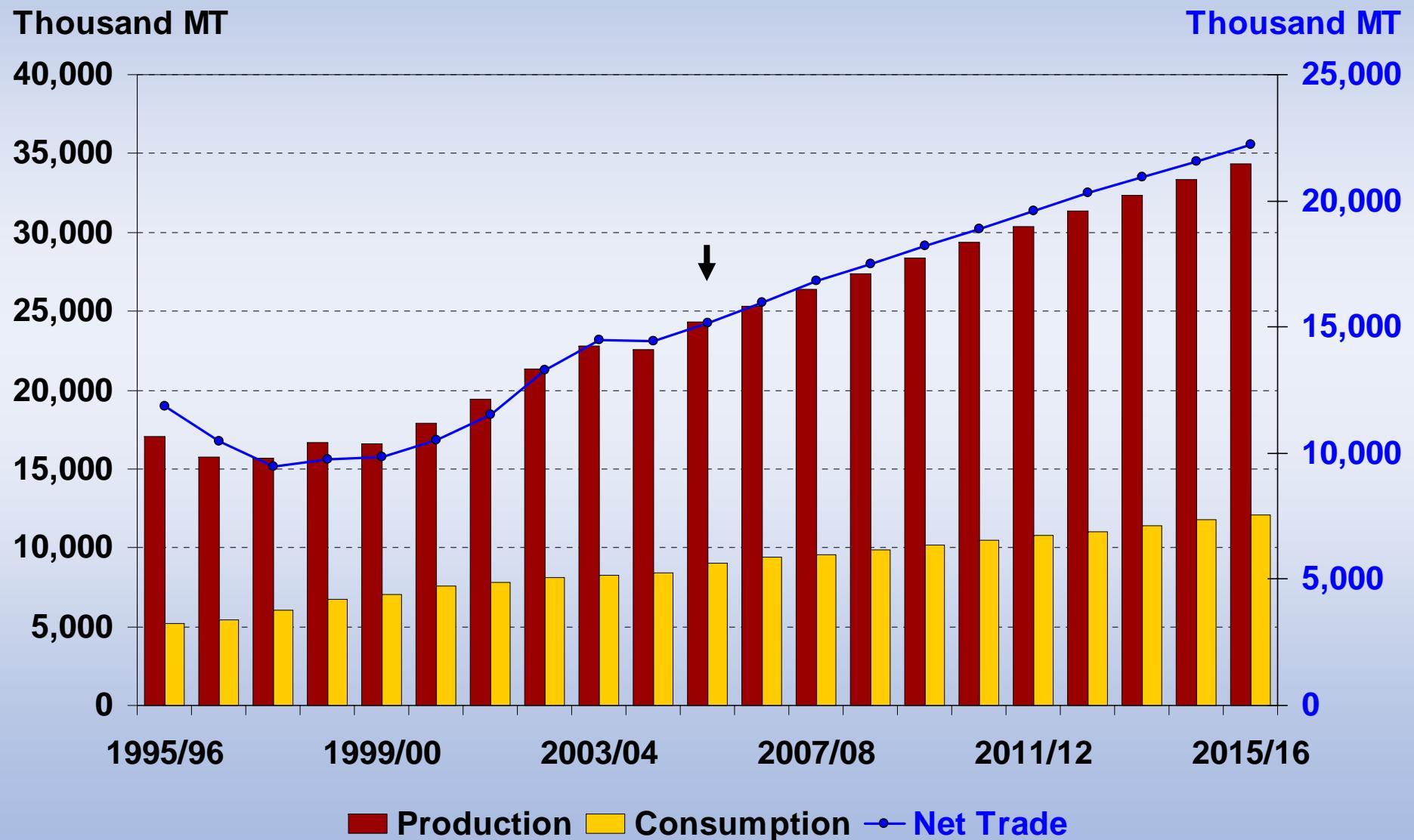
Argentine Soybean Meal Production, Consumption, and Net Trade



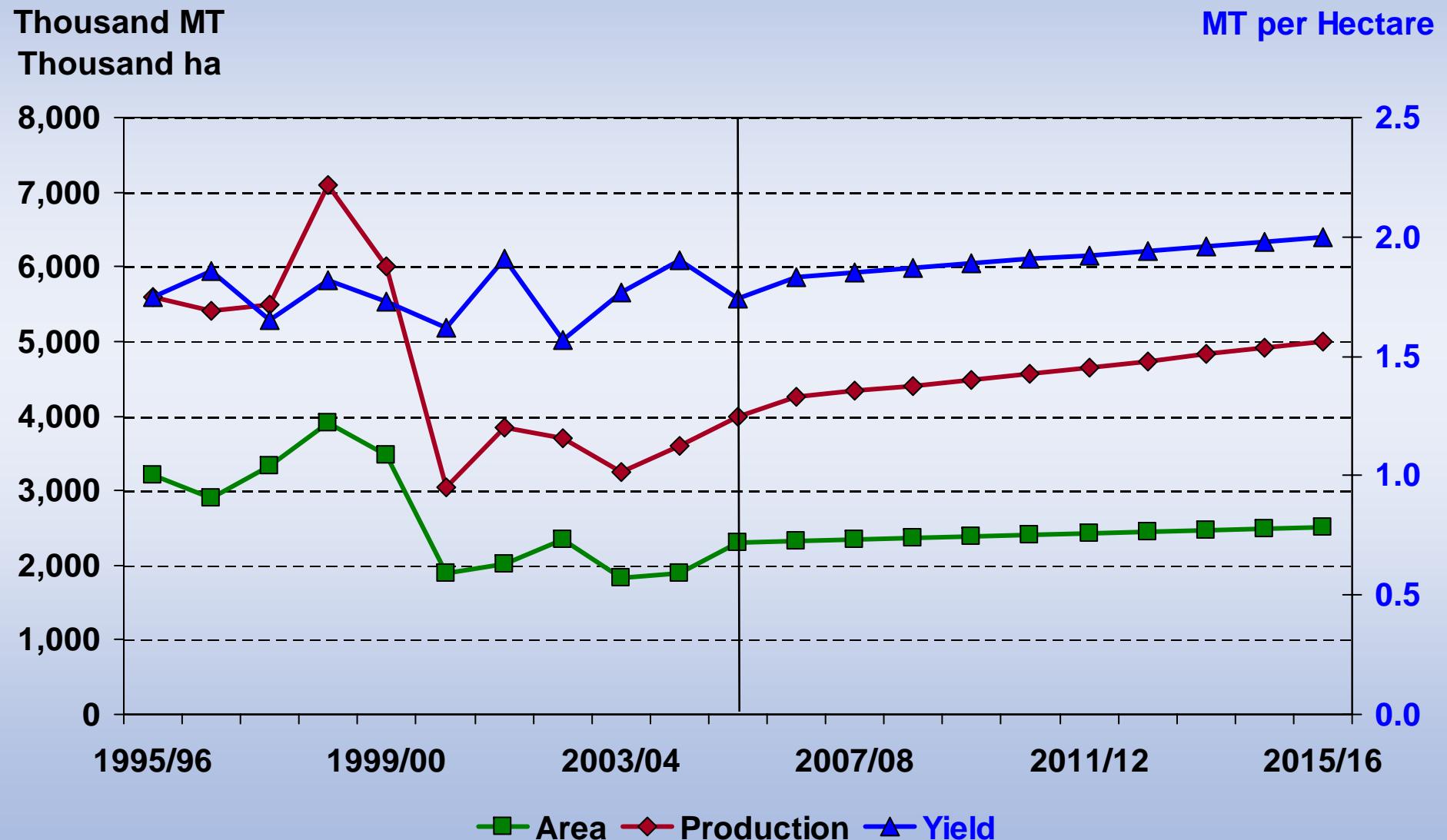
Brazilian Soybean Production, Crush, and Net Trade



Brazilian Soybean Meal Production, Consumption, and Net Trade



Argentine Sunflower Area, Yield, and Production

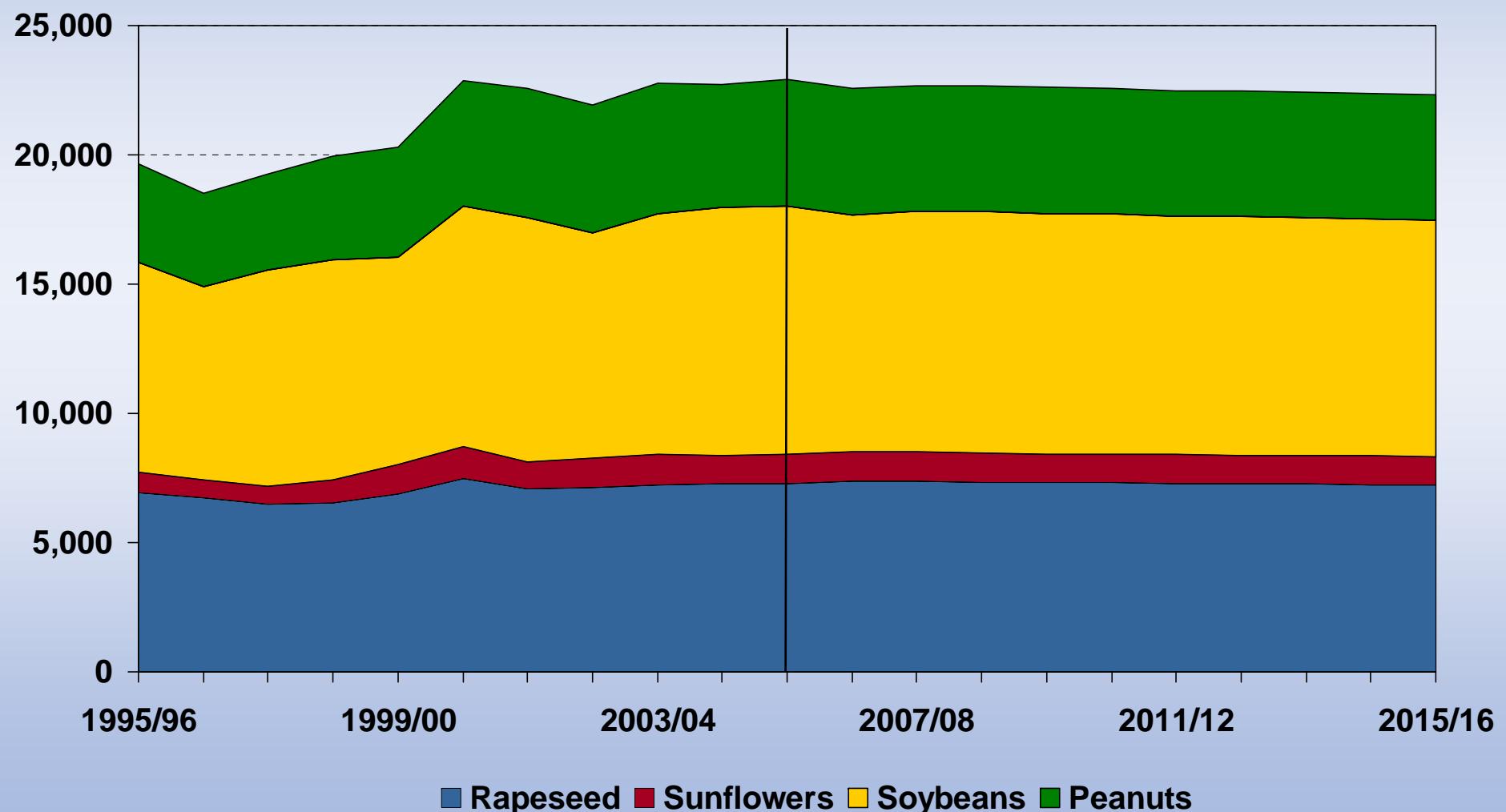


China

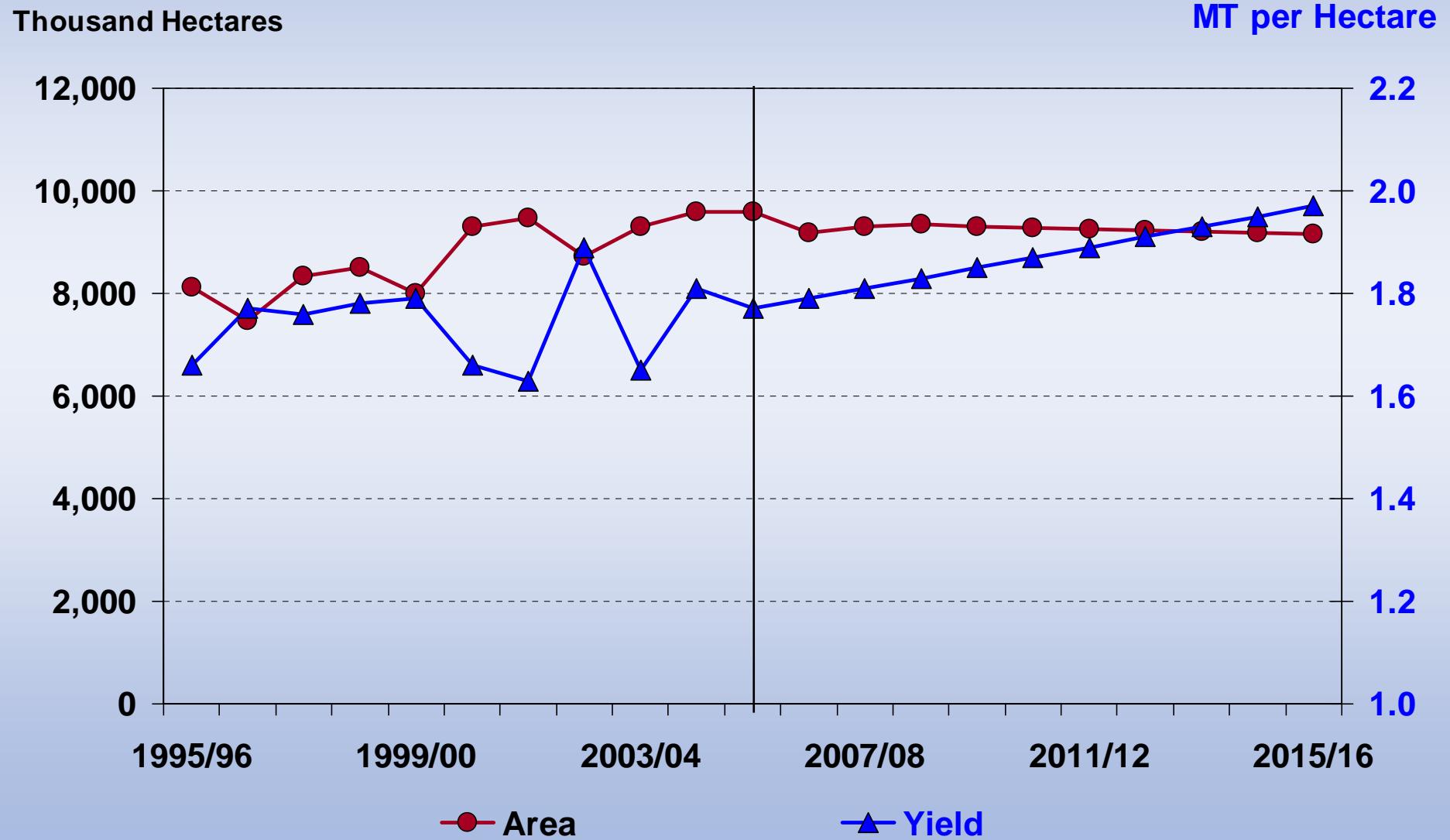
- Area shares of oilseeds
- Soybean production and use
- Development of soybean imports
- Vegetable oil consumption
- Rapeseed production and use

Chinese Oilseed Area Harvested

Thousand Hectares

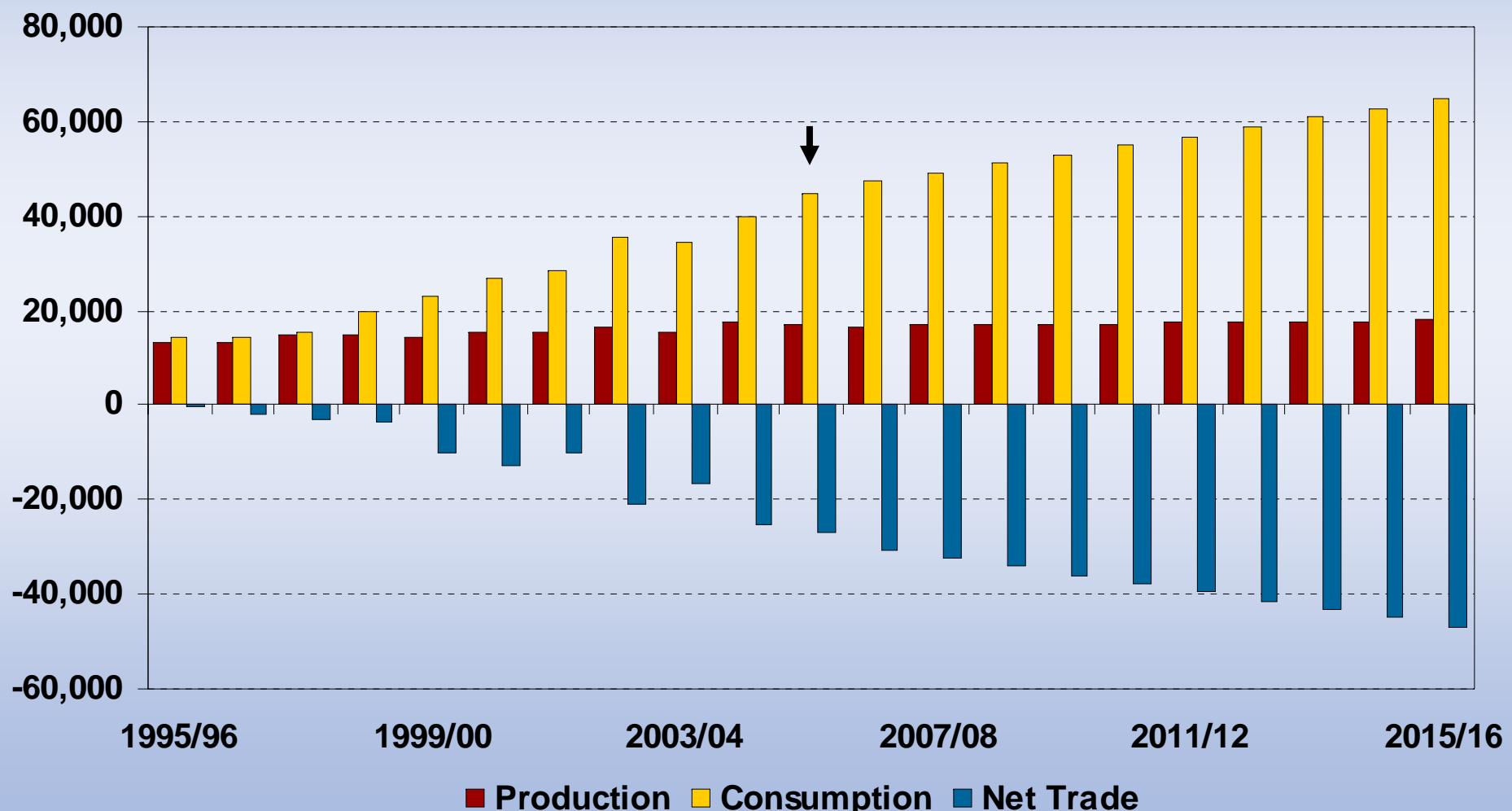


Chinese Soybean Area and Yield



Chinese Soybean Production, Consumption, and Net Trade

Thousand MT



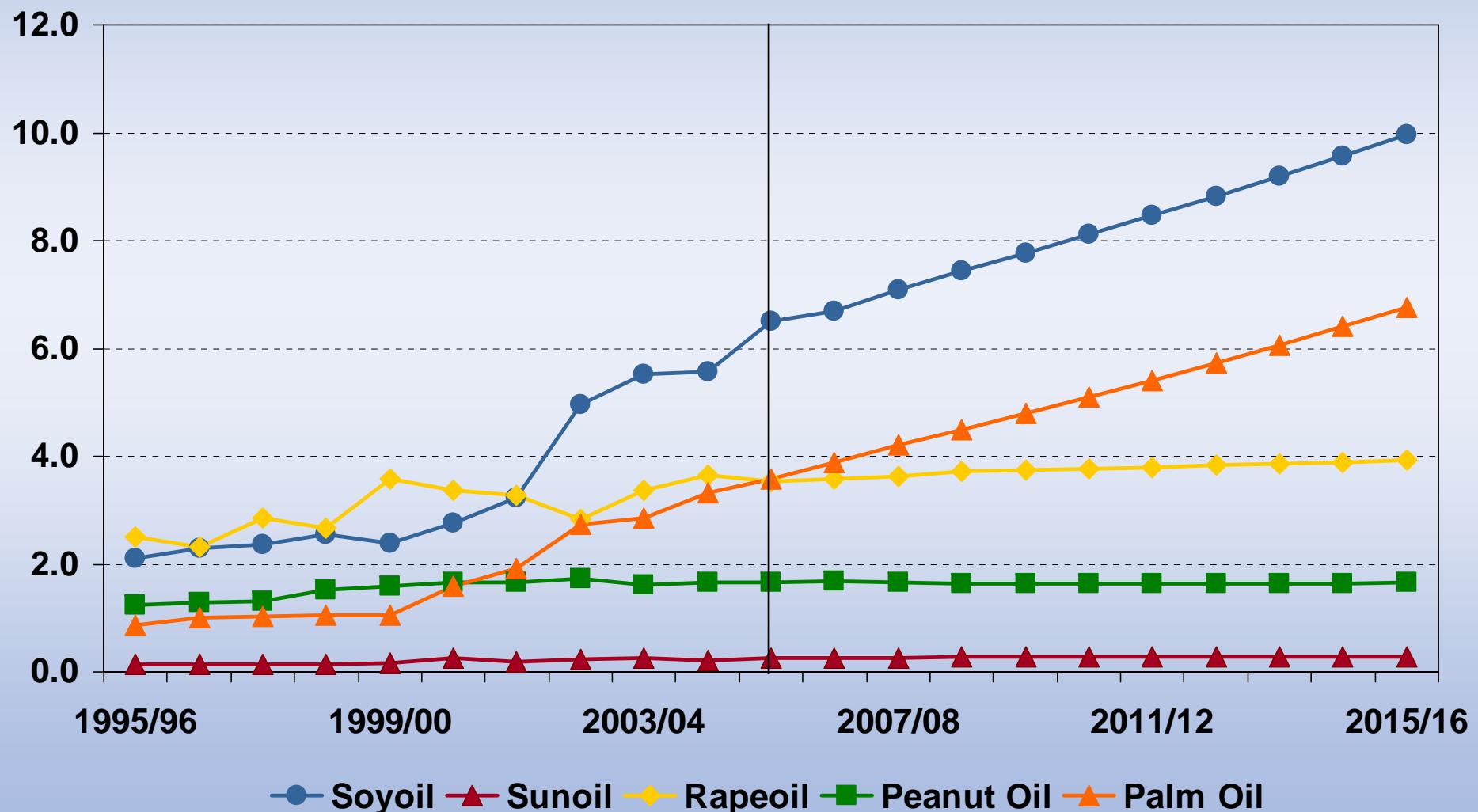
Chinese Soybean Meal Production, Consumption, and Net Trade

Thousand MT



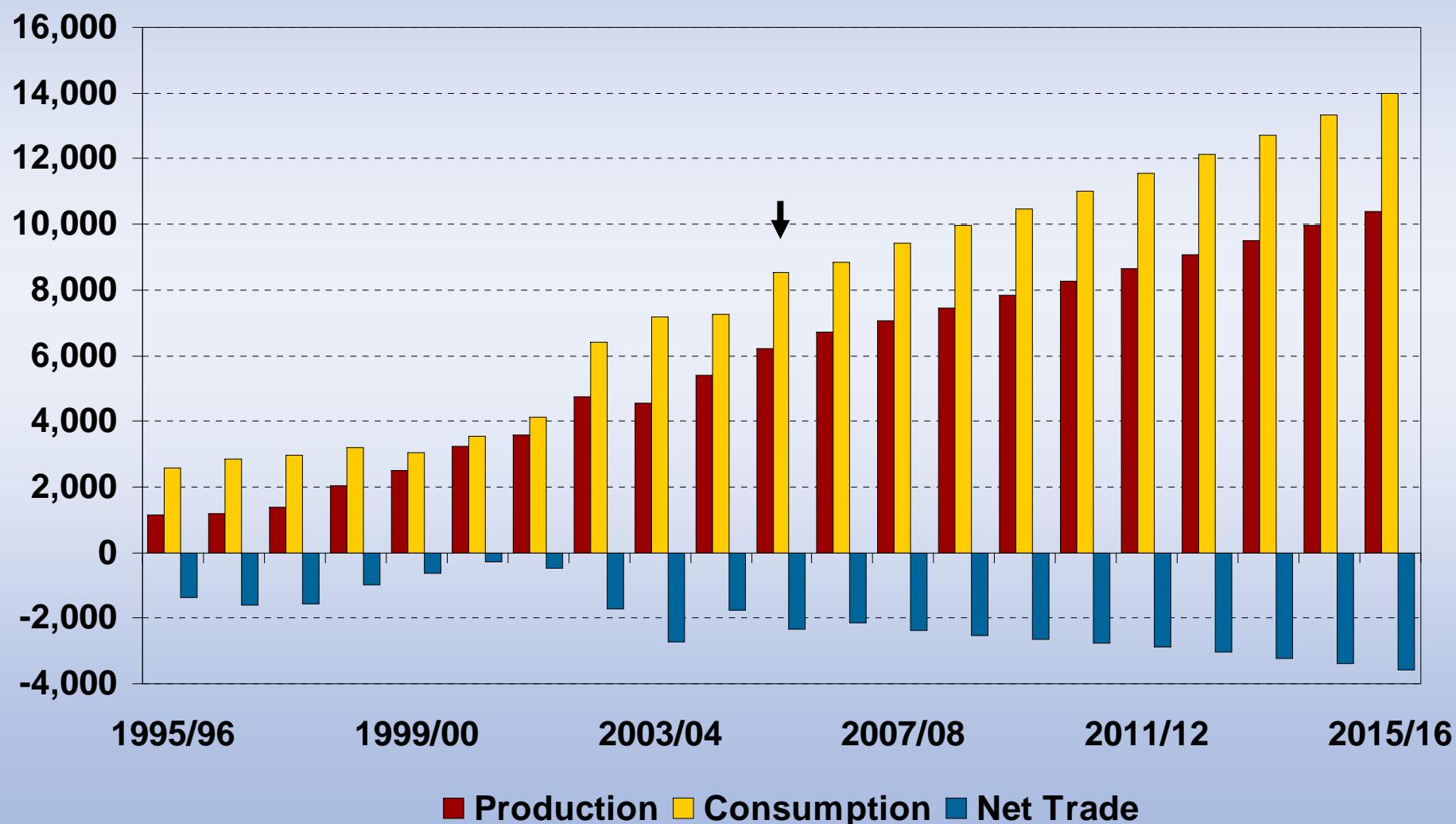
Chinese Per Capita Oil Consumption

KG per capita



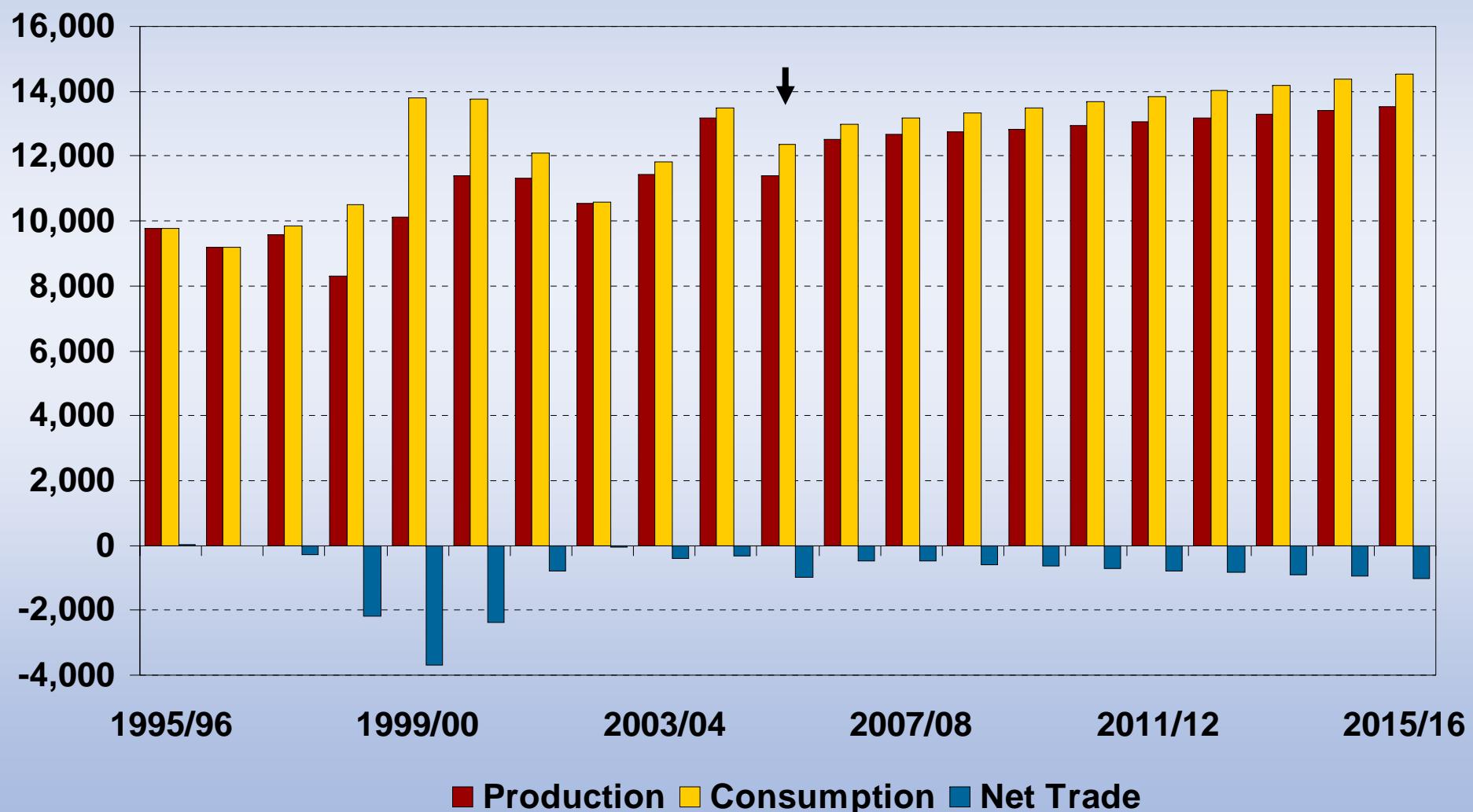
Chinese Soybean Oil Production, Consumption, and Net Trade

Thousand MT



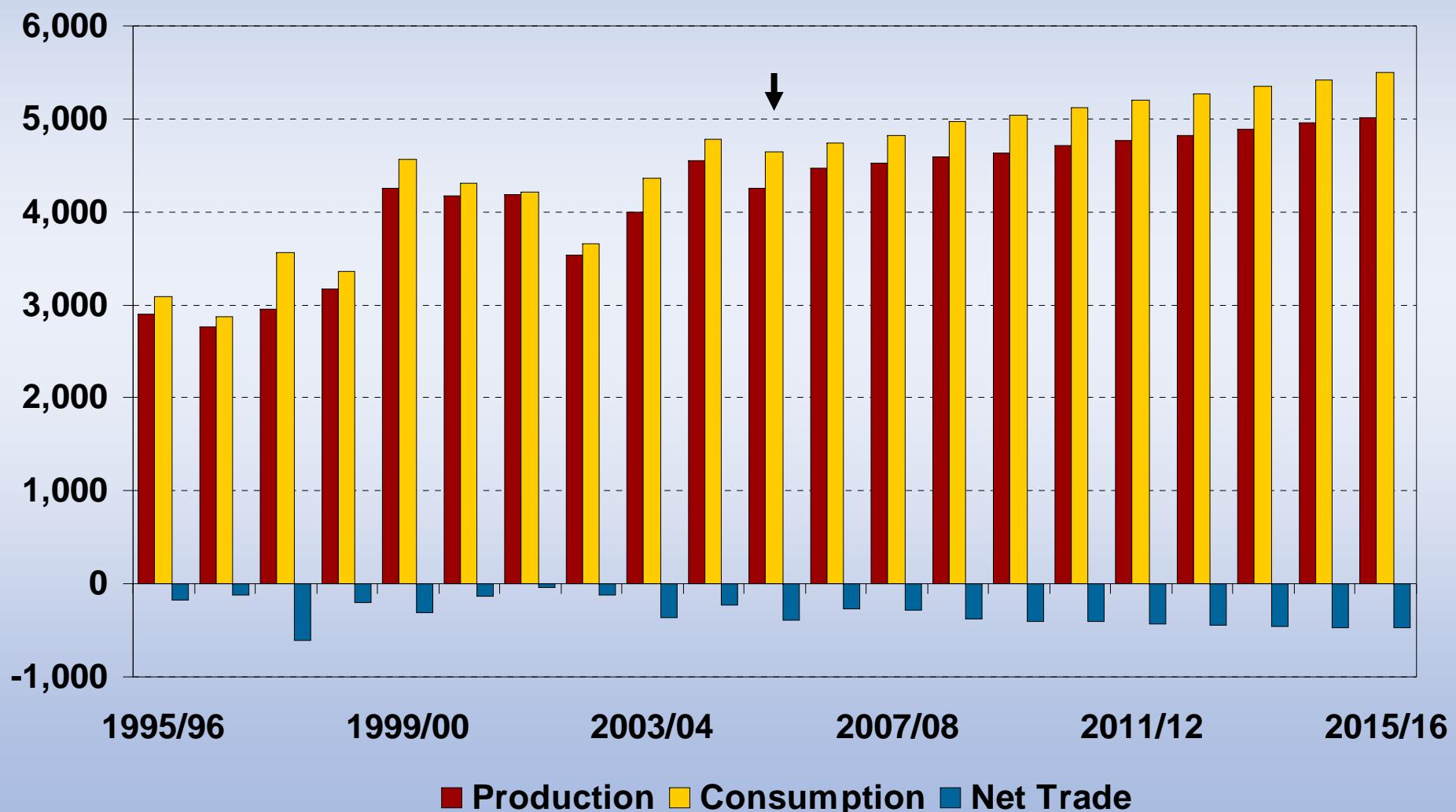
Chinese Rapeseed Production, Consumption, and Net Trade

Thousand MT



Chinese Rapeseed Oil Production, Consumption, and Net Trade

Thousand MT

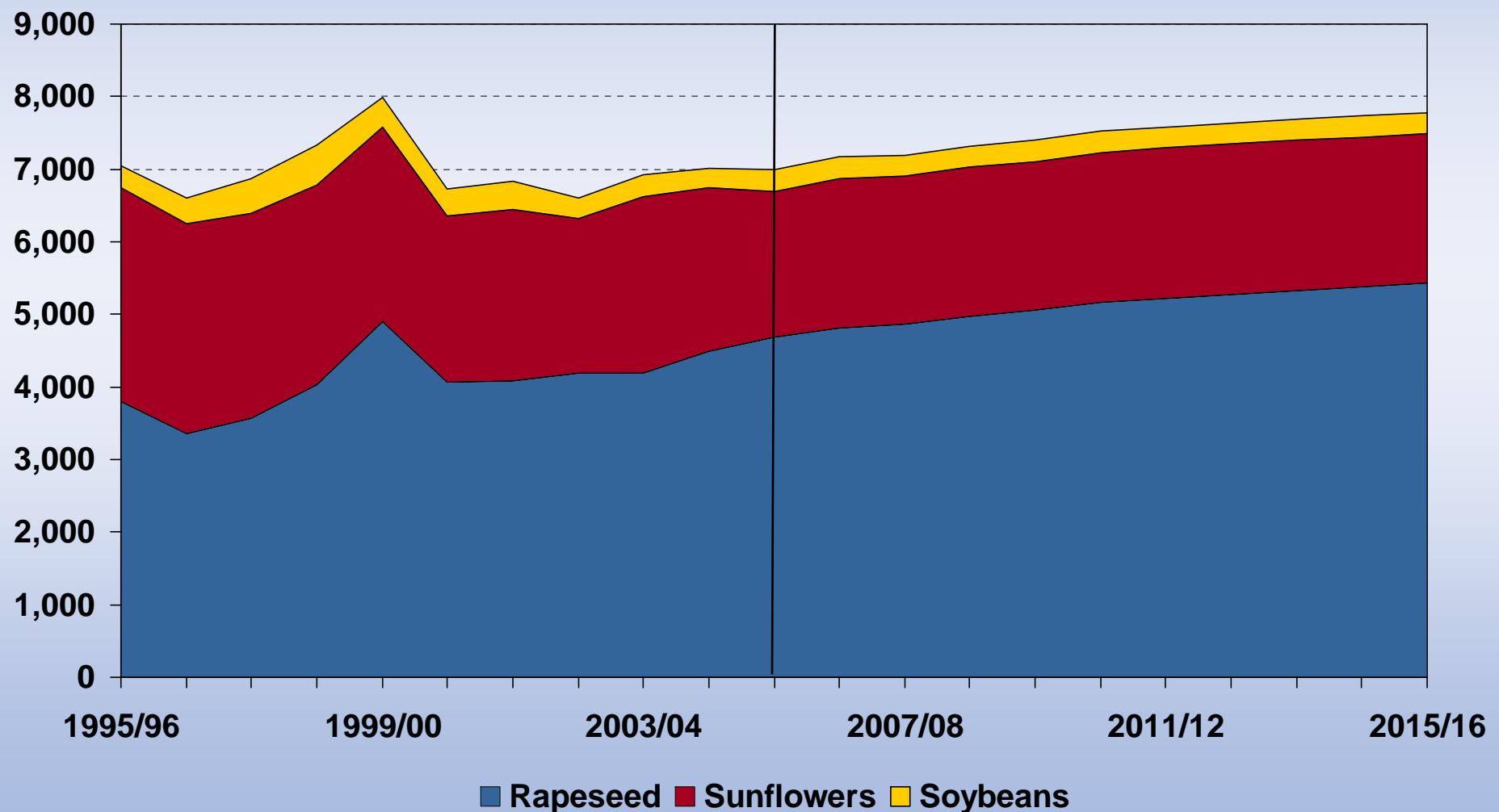


European Union

- Total oilseed area
 - Rapeseed and sunflower areas
- Domestic crush and net trade of oilseeds
 - Import of soybeans vs. soybean meal
- Production, consumption and net trade of rapeseed and sunflowers

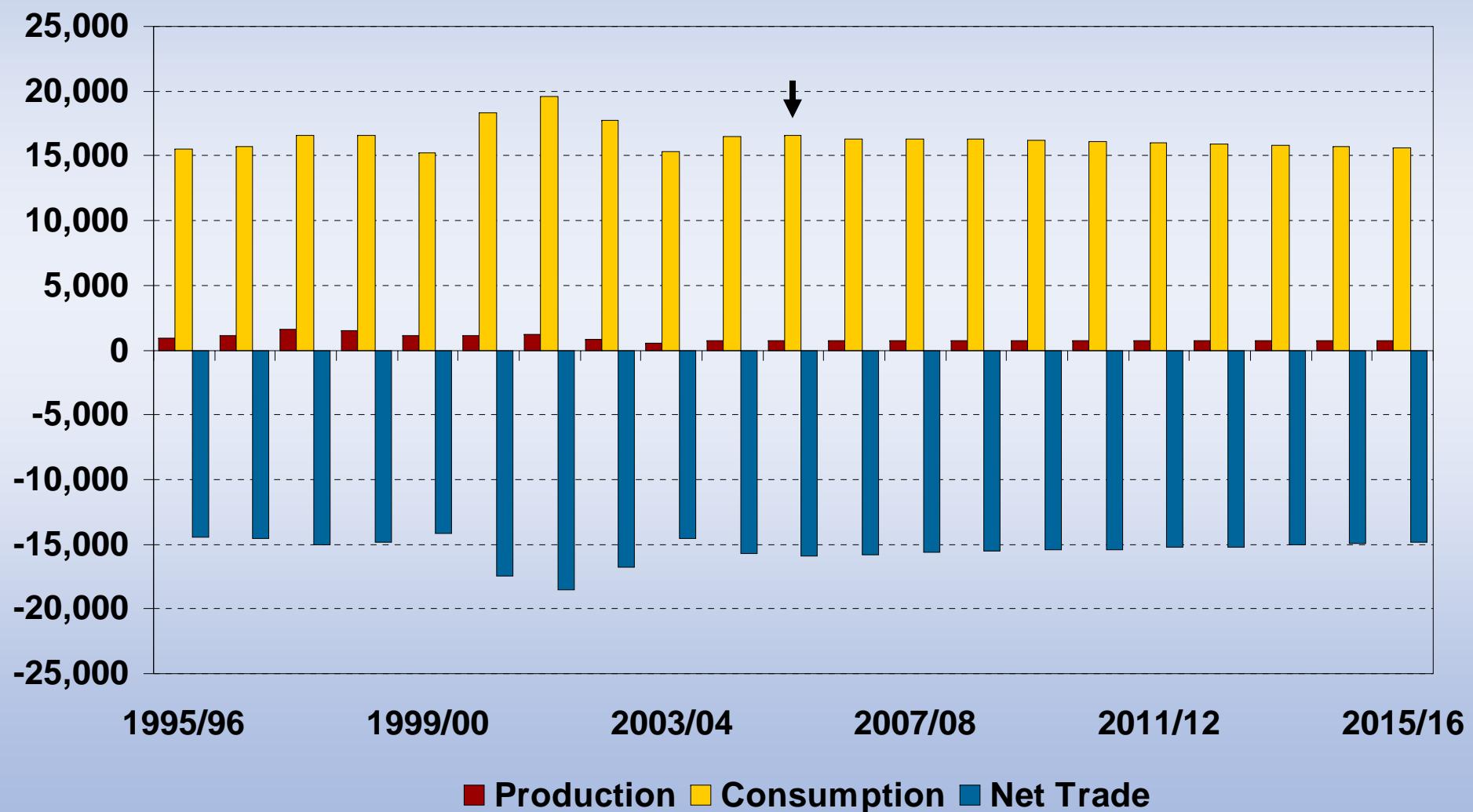
EU Oilseed Area Harvested

Thousand Hectares

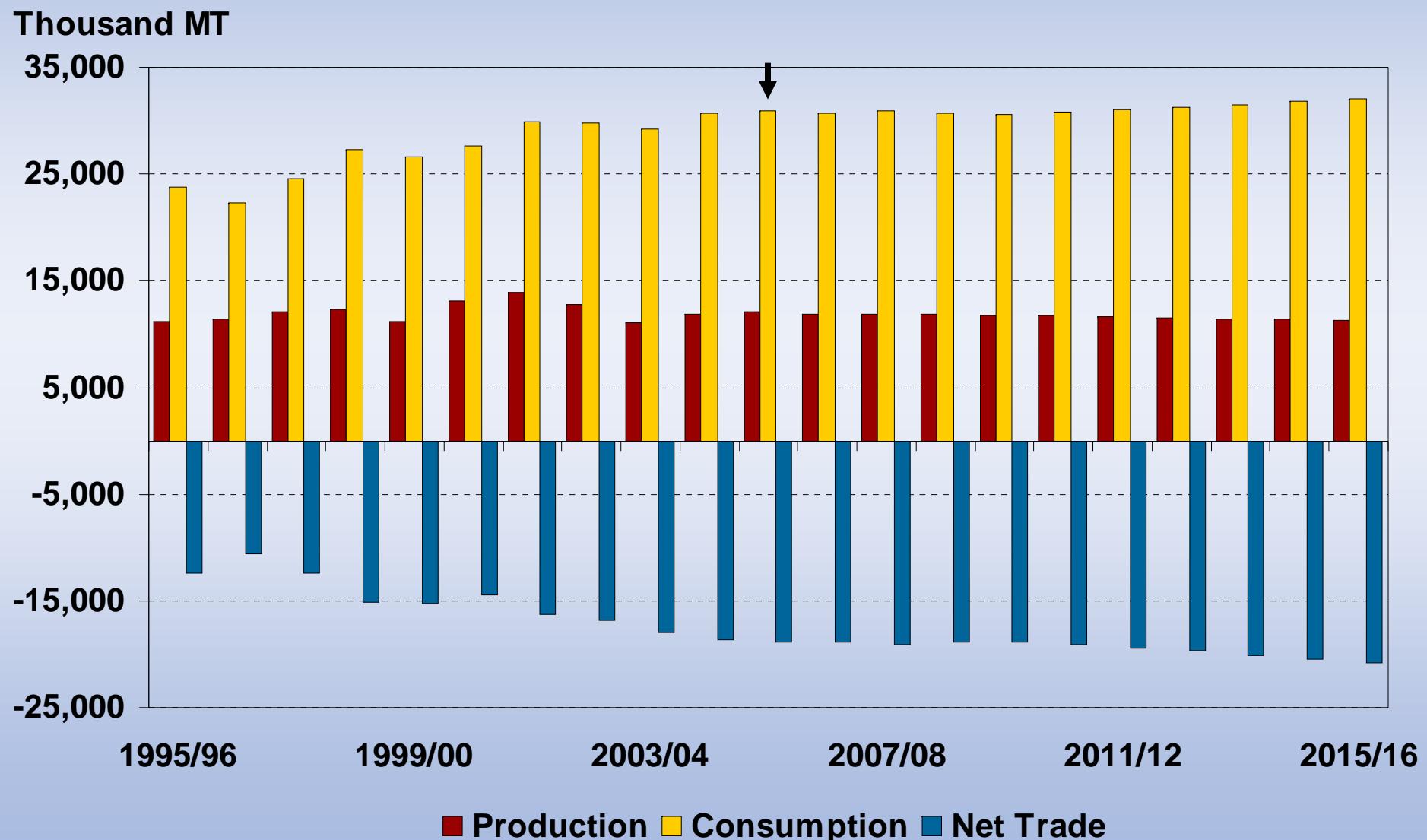


EU-15 Soybean Production, Consumption and, Net Trade

Thousand MT

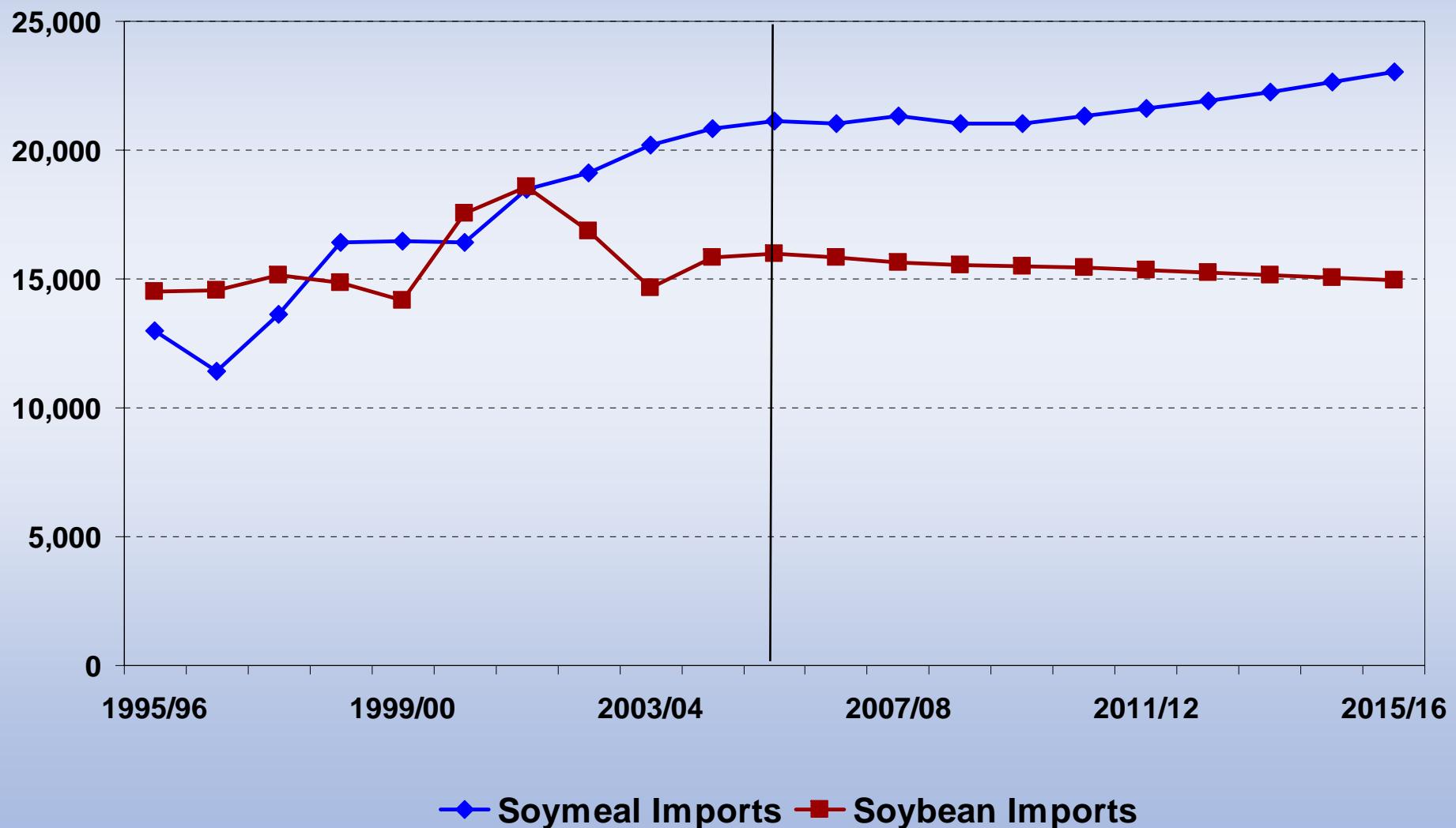


EU-15 Soybean Meal Production, Consumption, and Net Trade

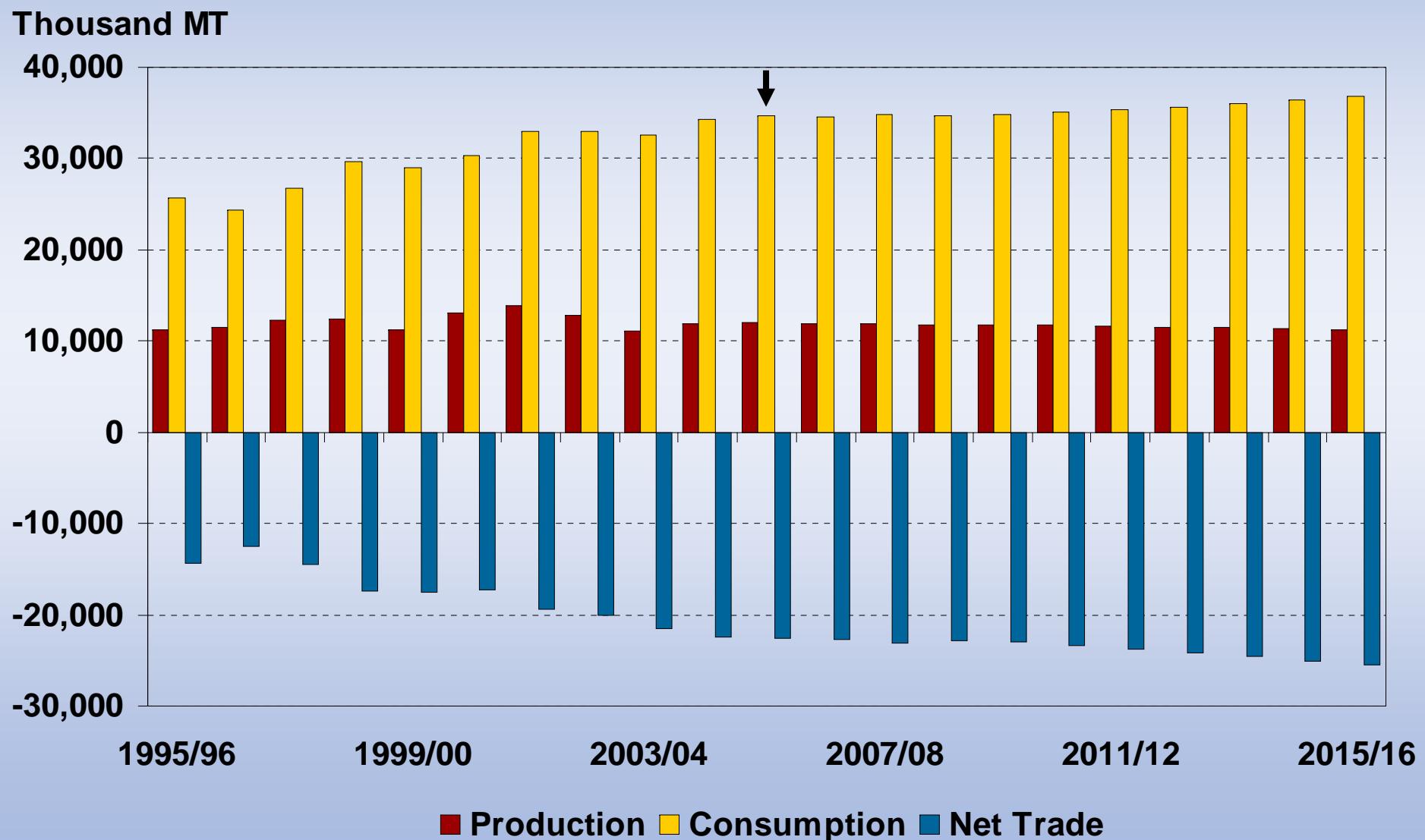


EU-15 Soybean Meal Imports vs. Soybean Imports

Thousand MT

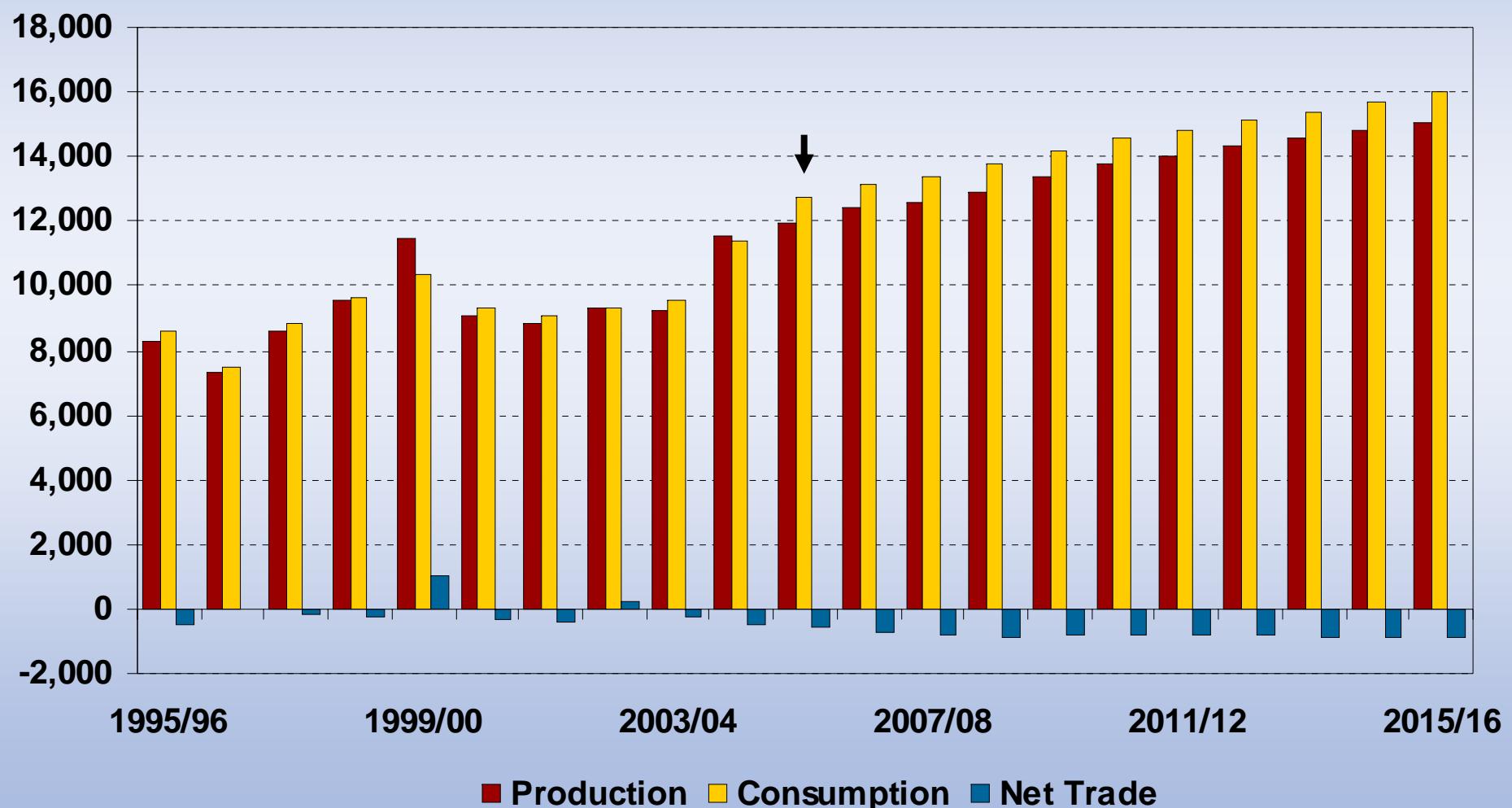


EU Soybean Meal Production, Consumption, and Net Trade



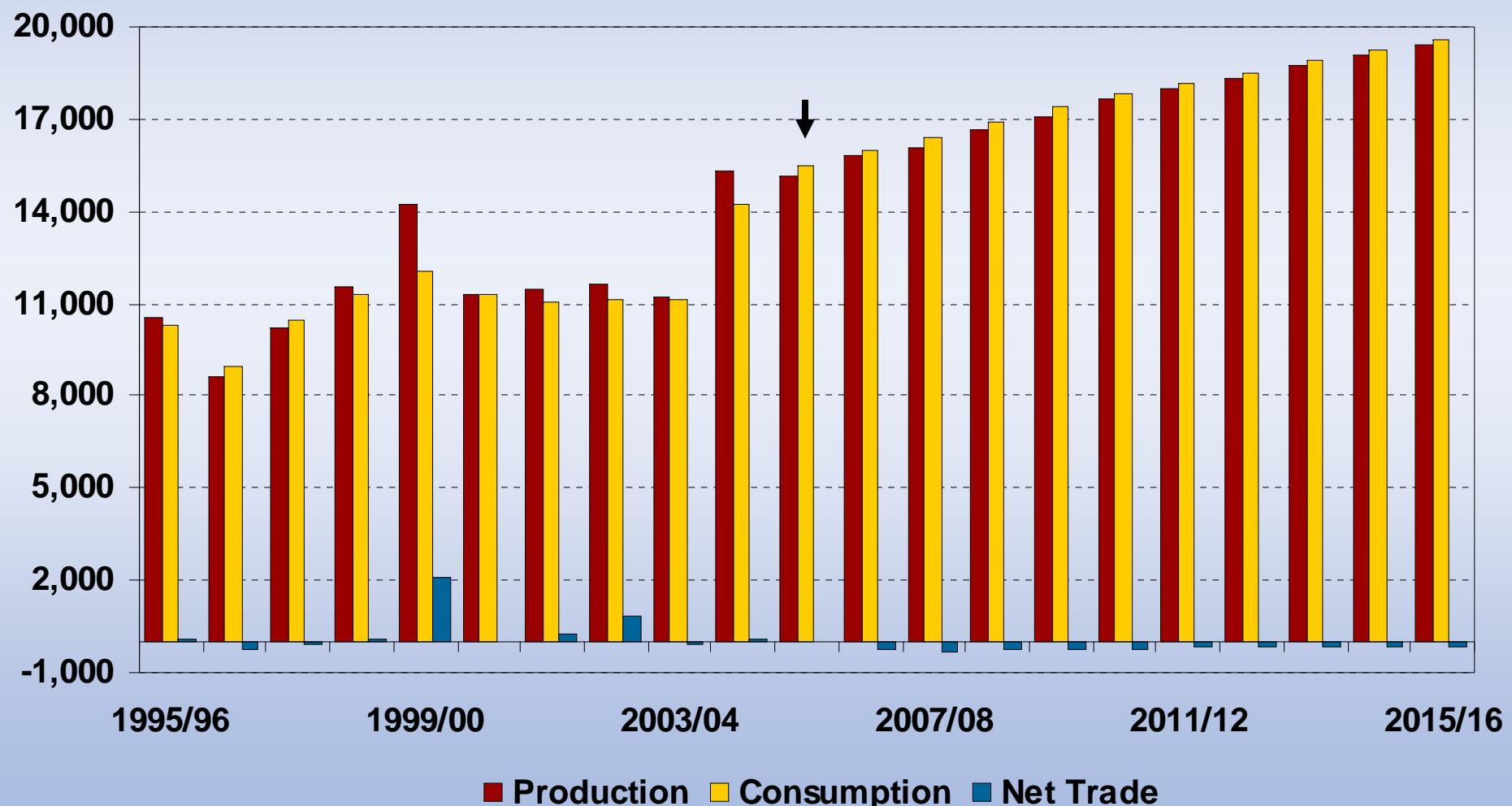
EU-15 Rapeseed Production, Consumption, and Net Trade

Thousand MT



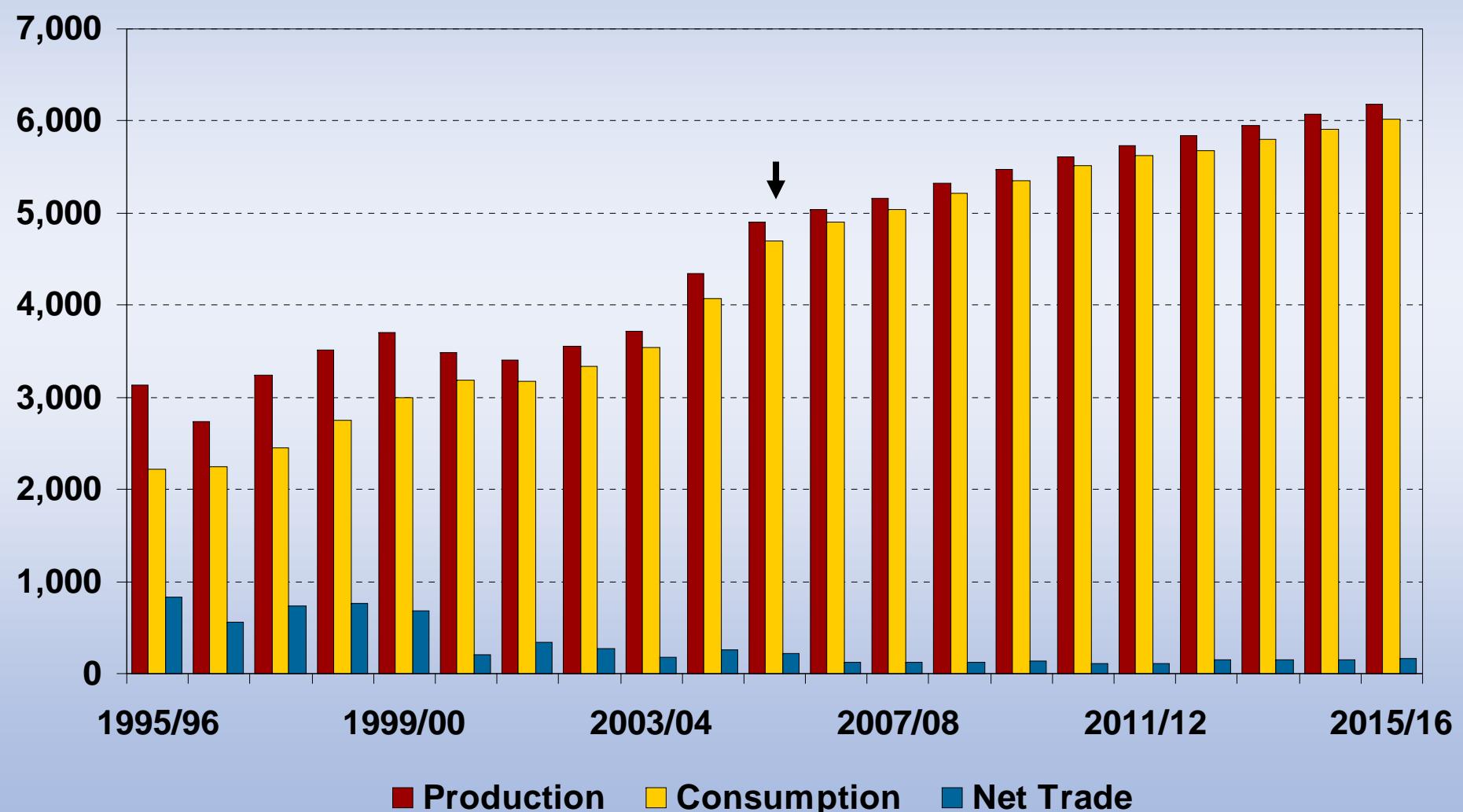
EU Rapeseed Production, Consumption, and Net Trade

Thousand MT



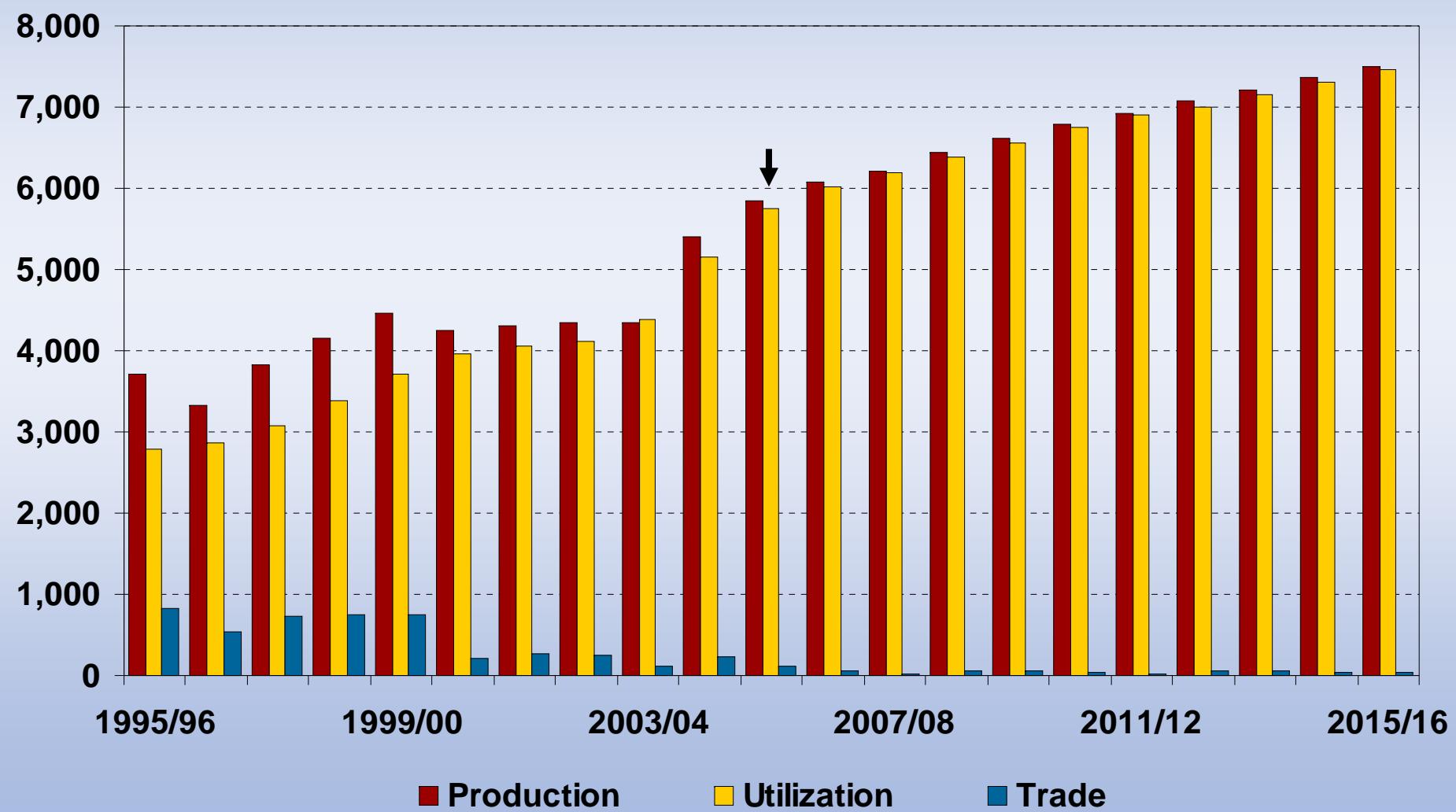
EU-15 Rapeseed Oil Production, Consumption and Net Trade

Thousand MT



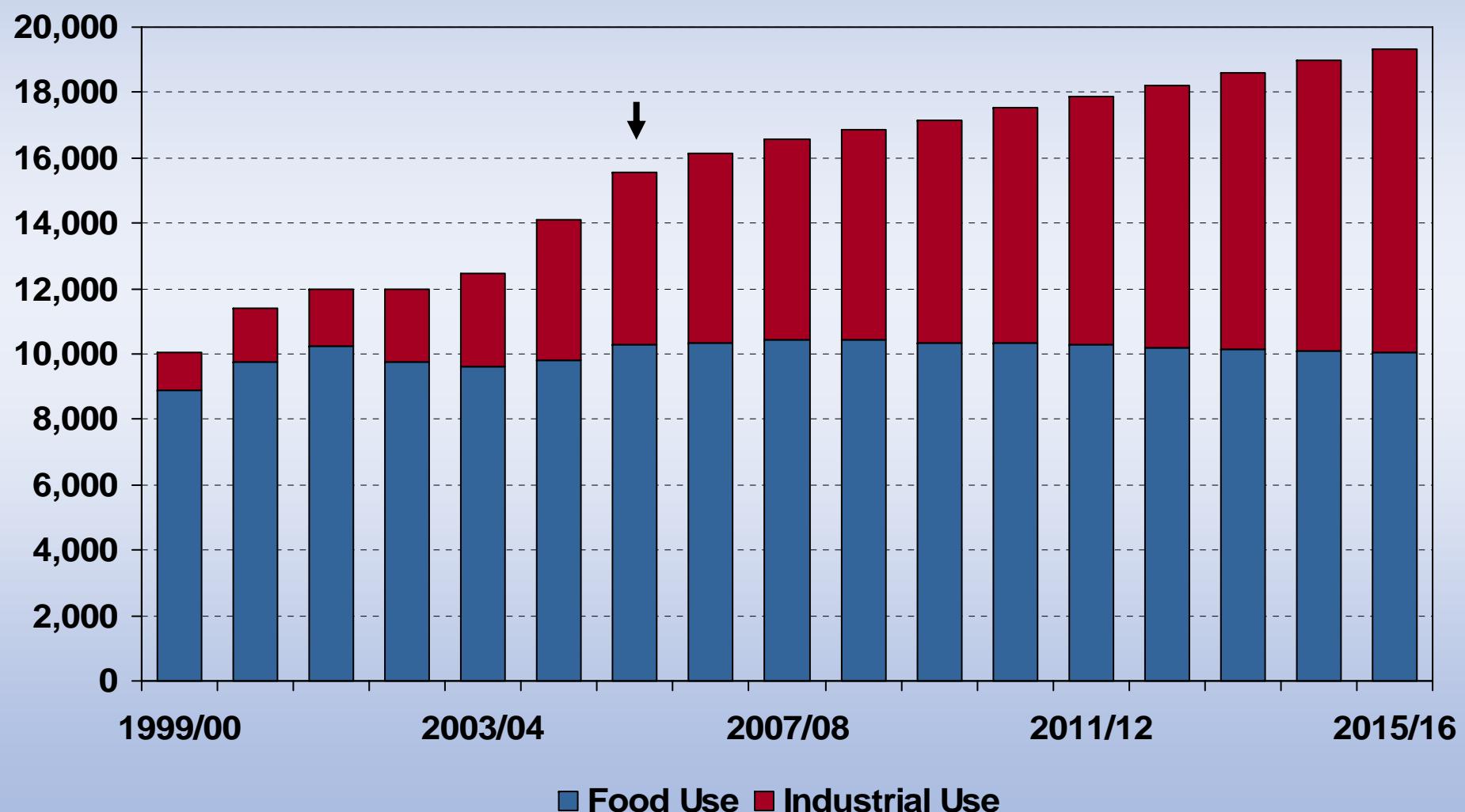
EU Rapeseed Oil Production, Consumption and Net Trade

Thousand MT



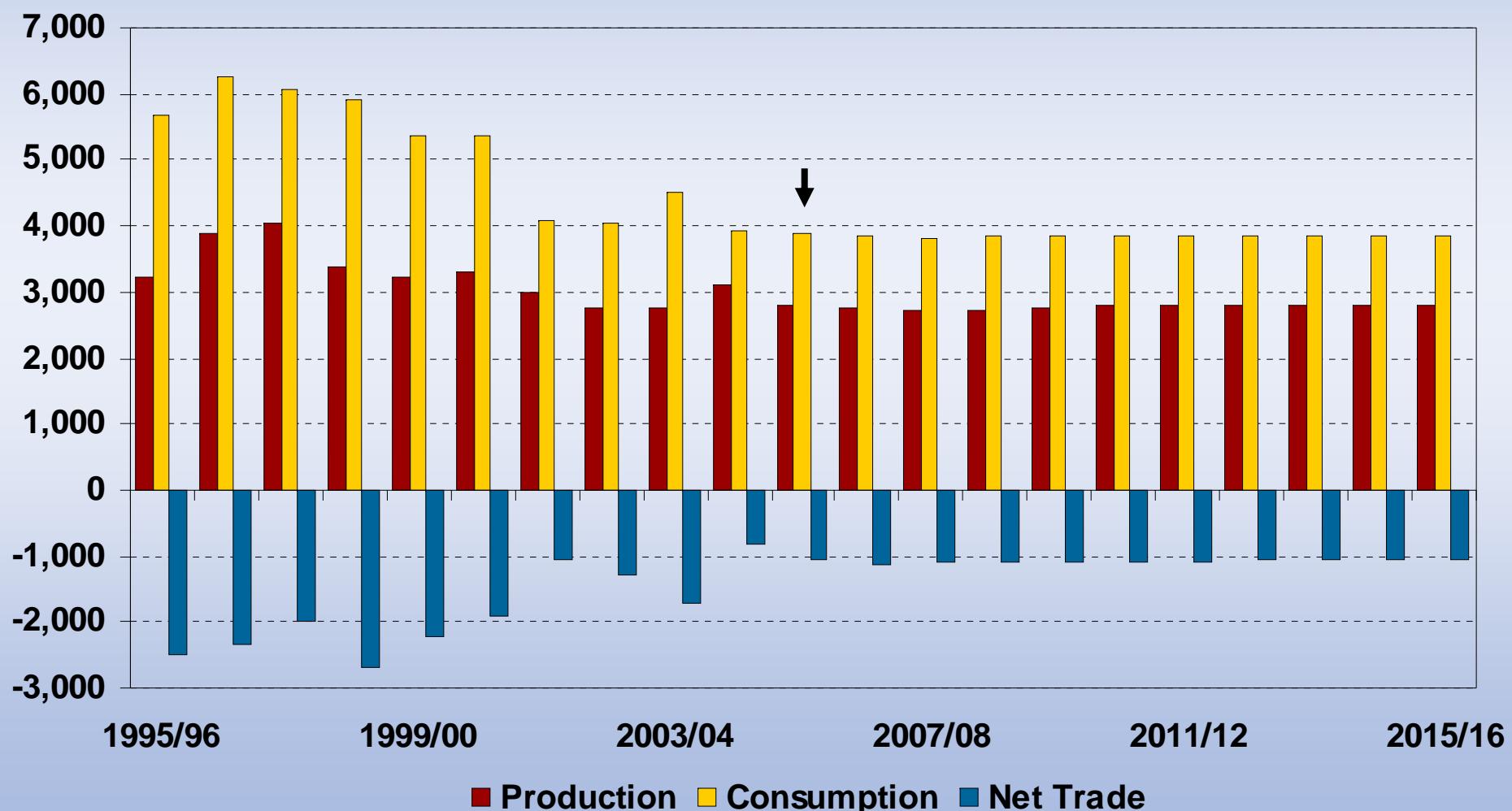
EU Vegetable Oil Consumption

Thousand MT



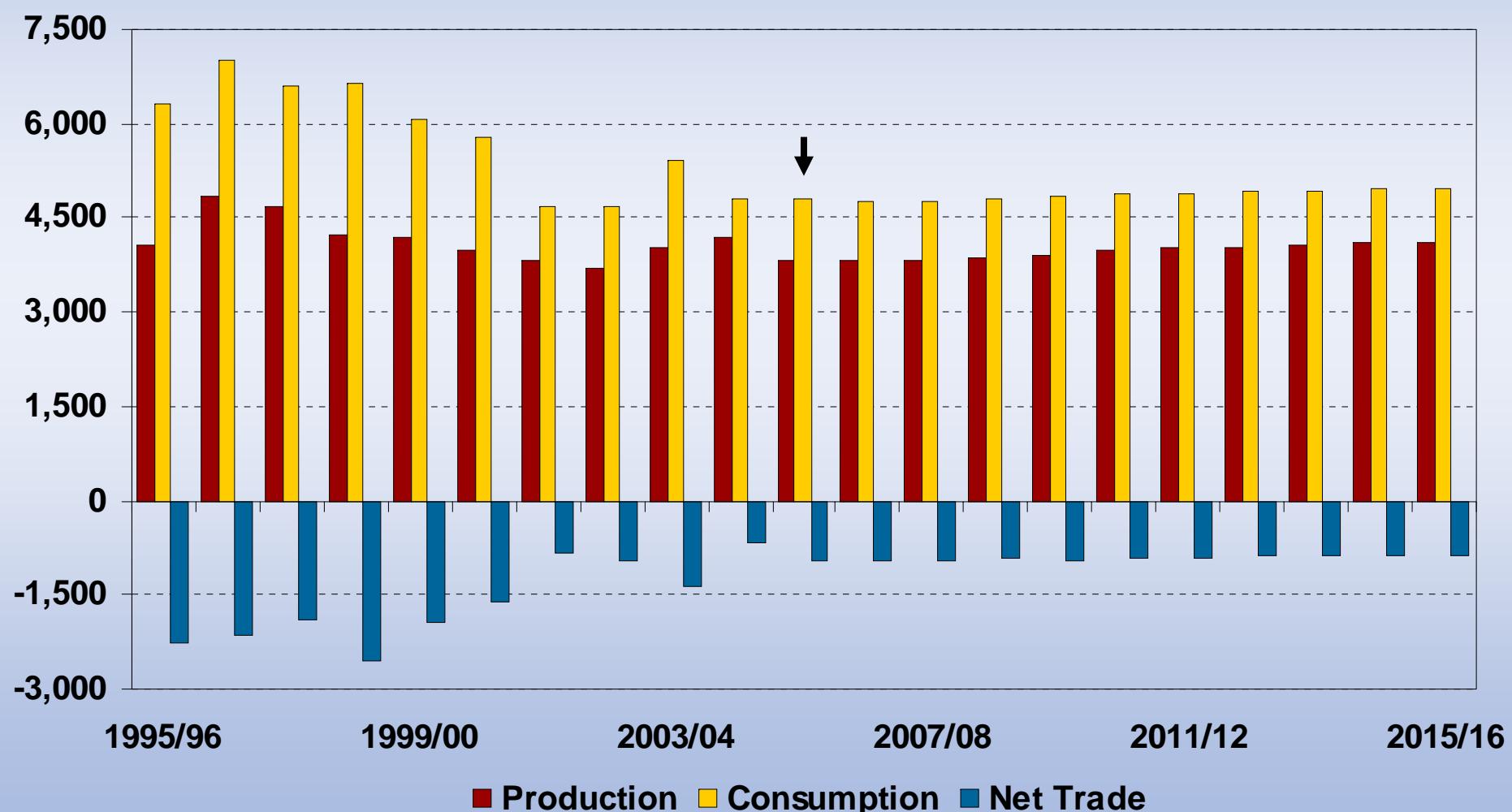
EU-15 Sunflower Seed Production, Consumption, and Net Trade

Thousand MT



EU Sunflower Seed Production, Consumption, and Net Trade

Thousand MT

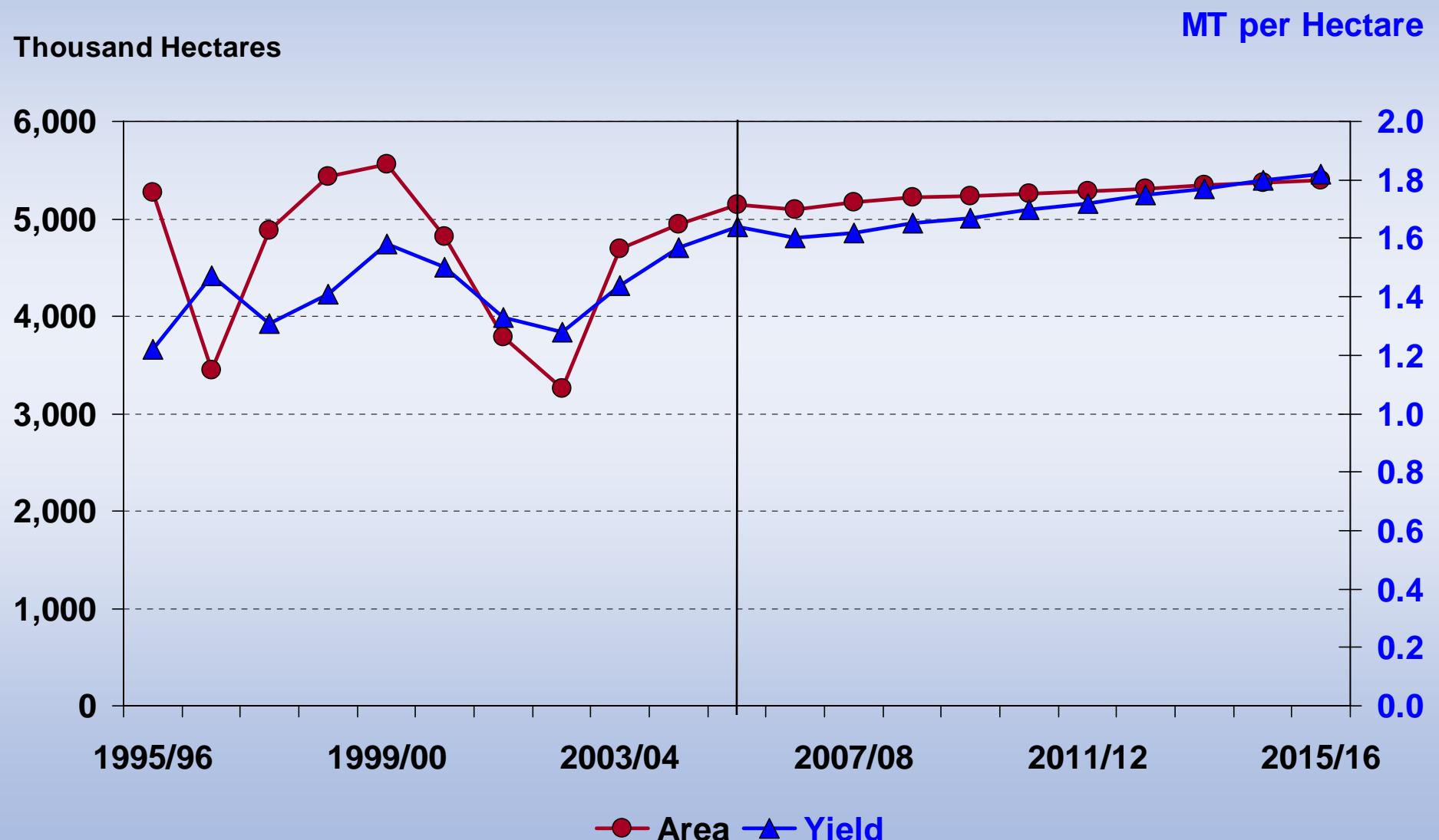


Canada

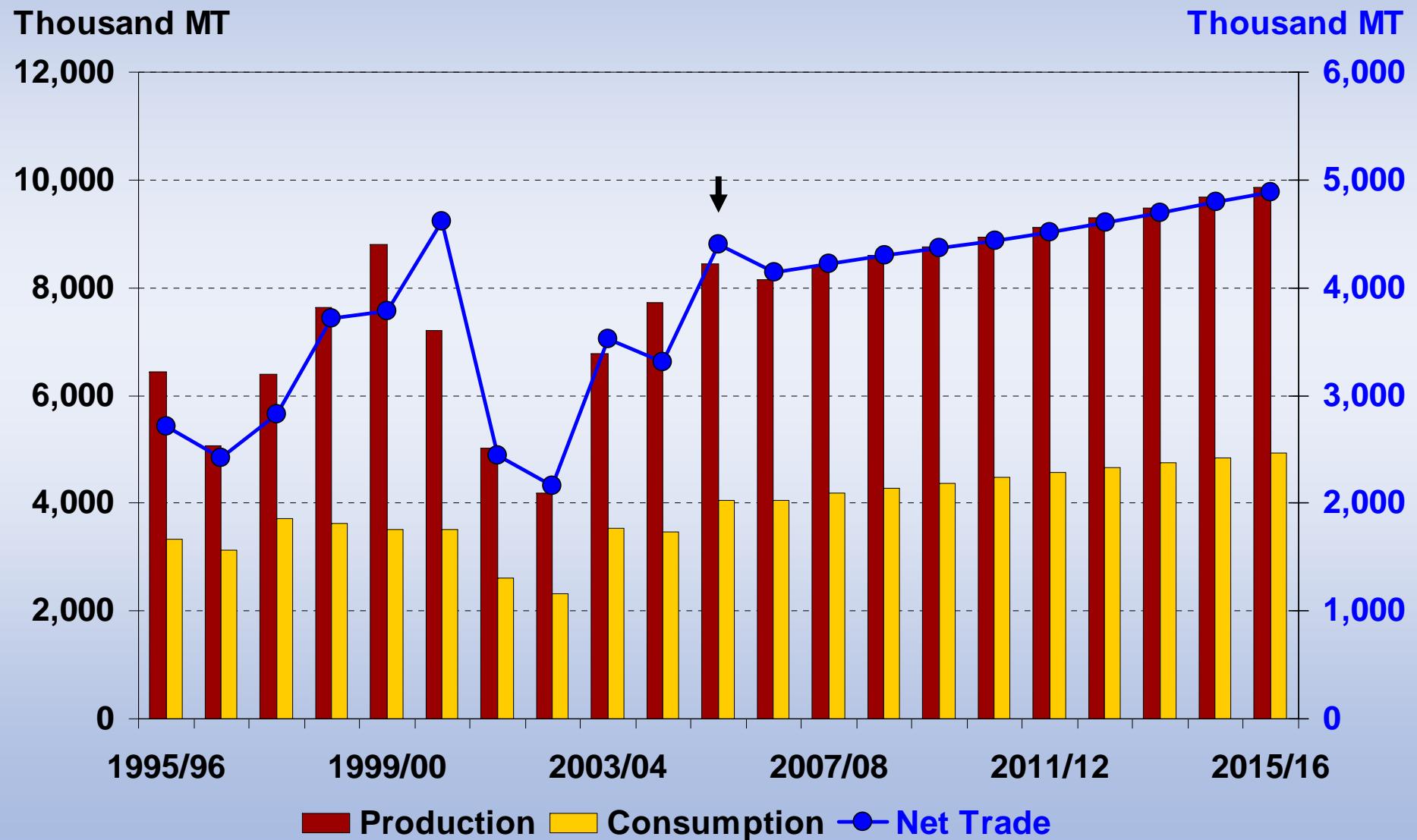
Development of Canola Sector

- Rapeseed area development
- Expected yields
- Domestic crush and net trade of canola
- Rapeseed meal and oil exports

Canadian Rapeseed Area and Yield



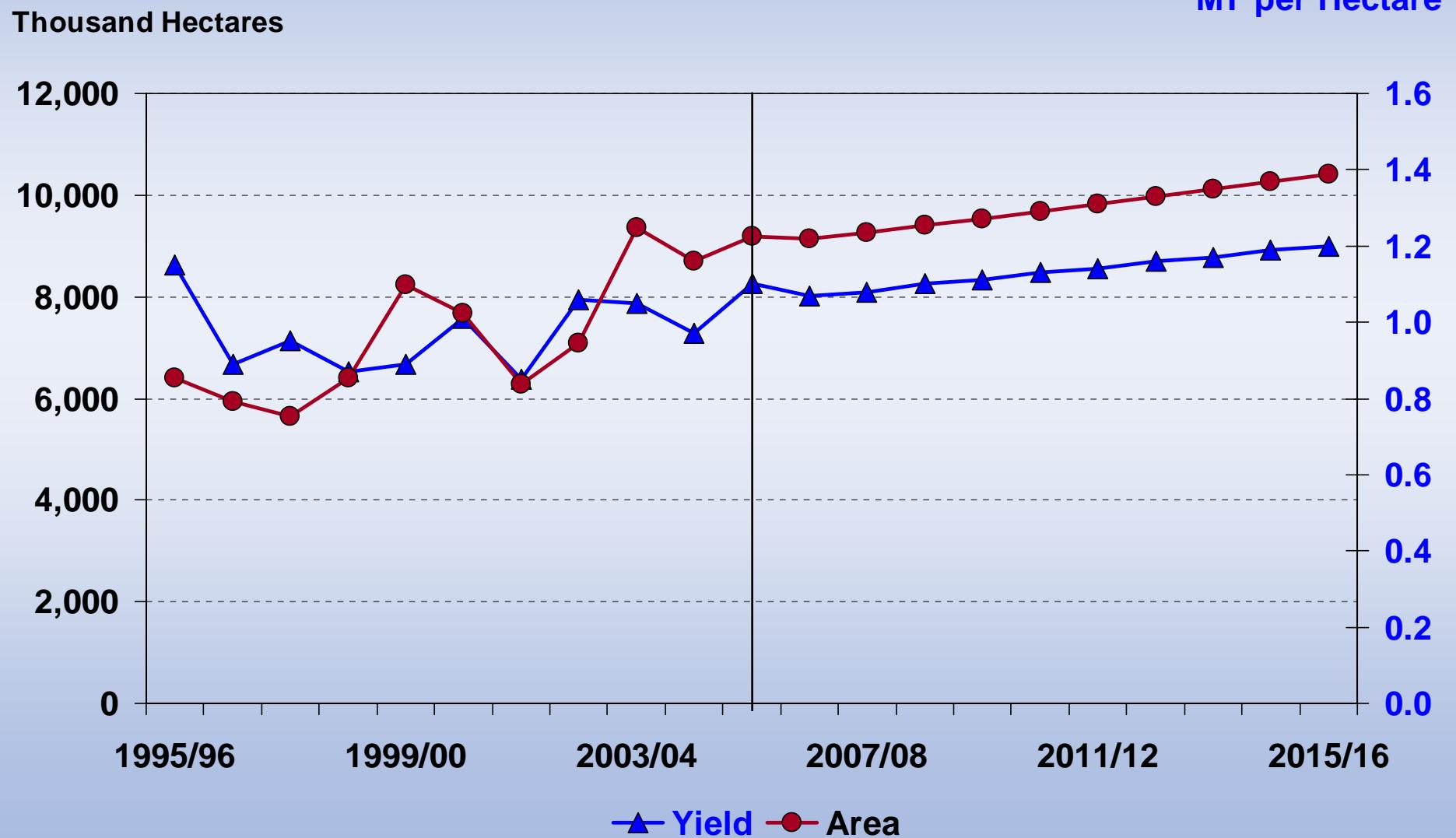
Canadian Rapeseed Production, Consumption, and Net Trade



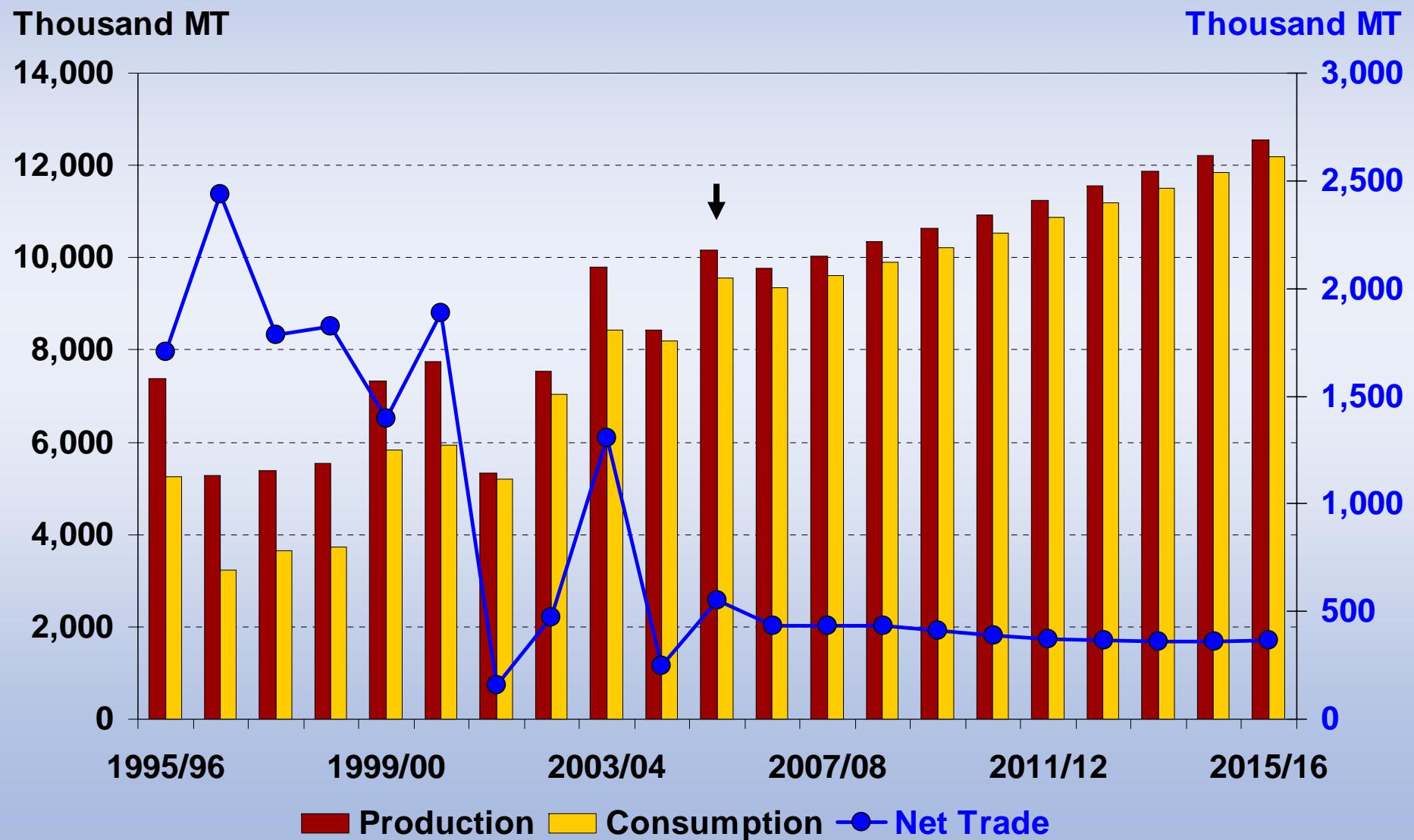
Commonwealth of Independent States (CIS)

- Sunflower area and yield
- Future of the crushing industry
- Domestic use of protein meals
 - Import of soybean meal

CIS Sunflower Area and Yield



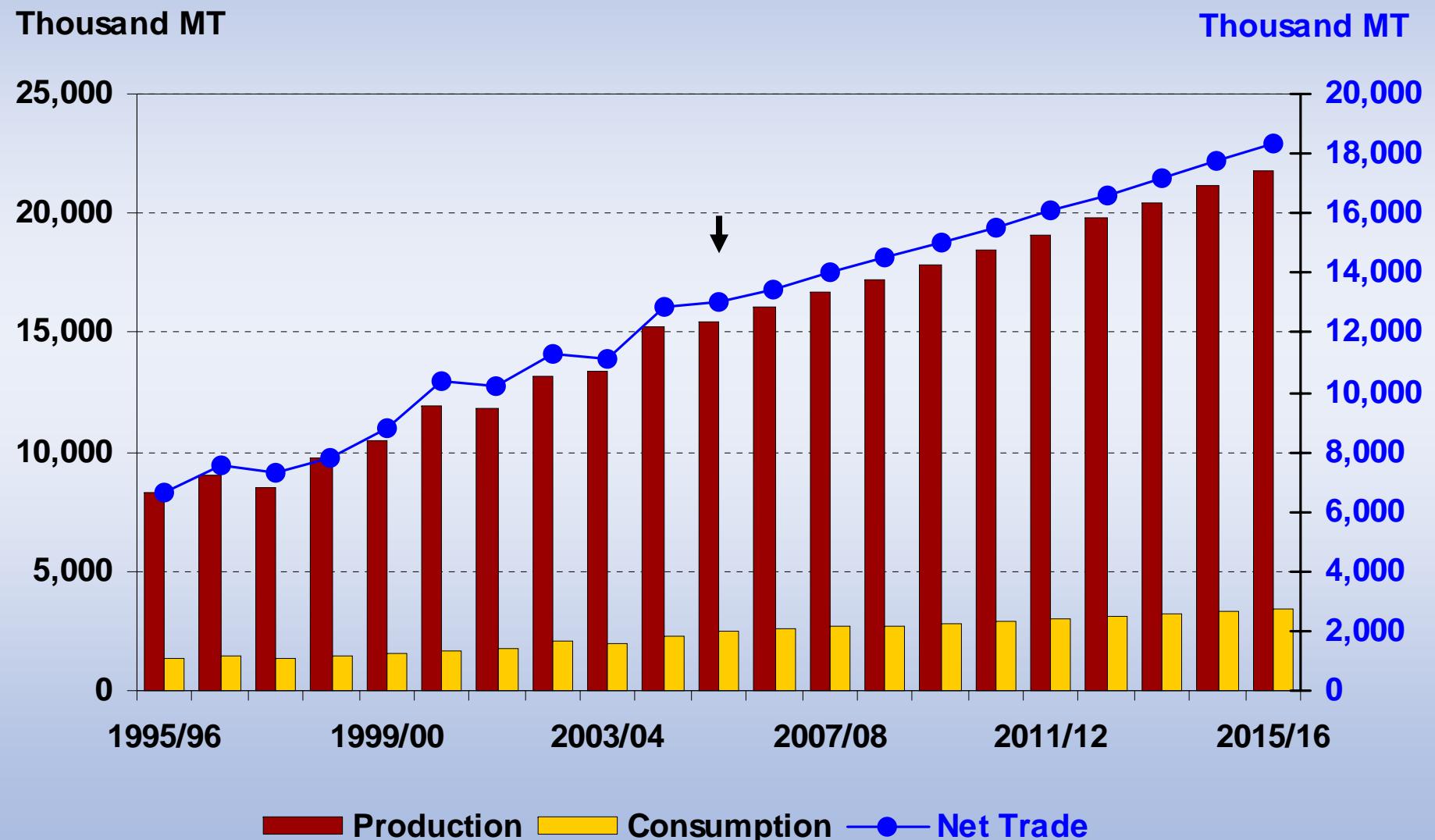
CIS Sunflower Production, Consumption, and Net Trade



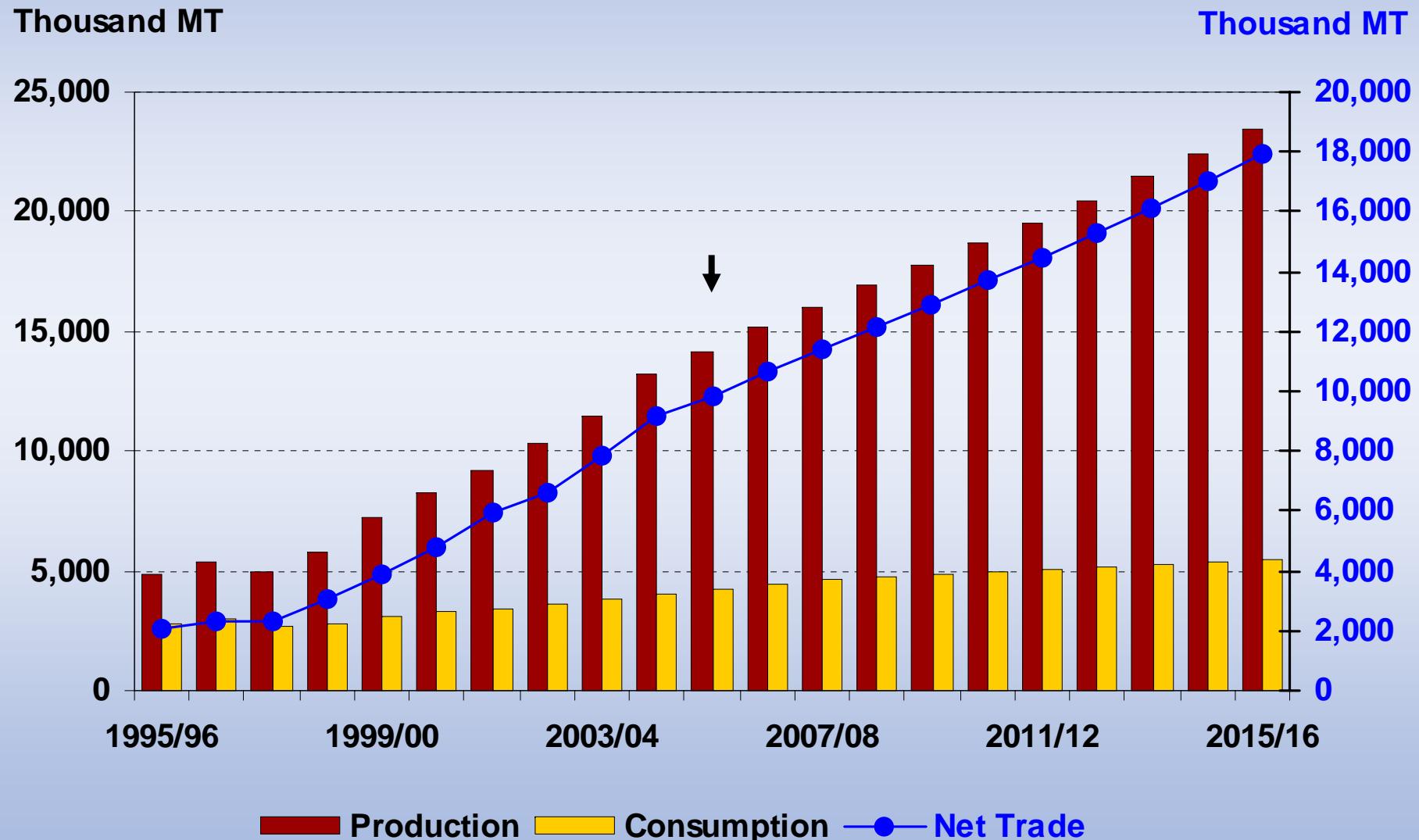
Palm Oil

- Developments in Malaysia and Indonesia
- World palm oil trade

Malaysian Palm Oil Production, Consumption, and Net Trade

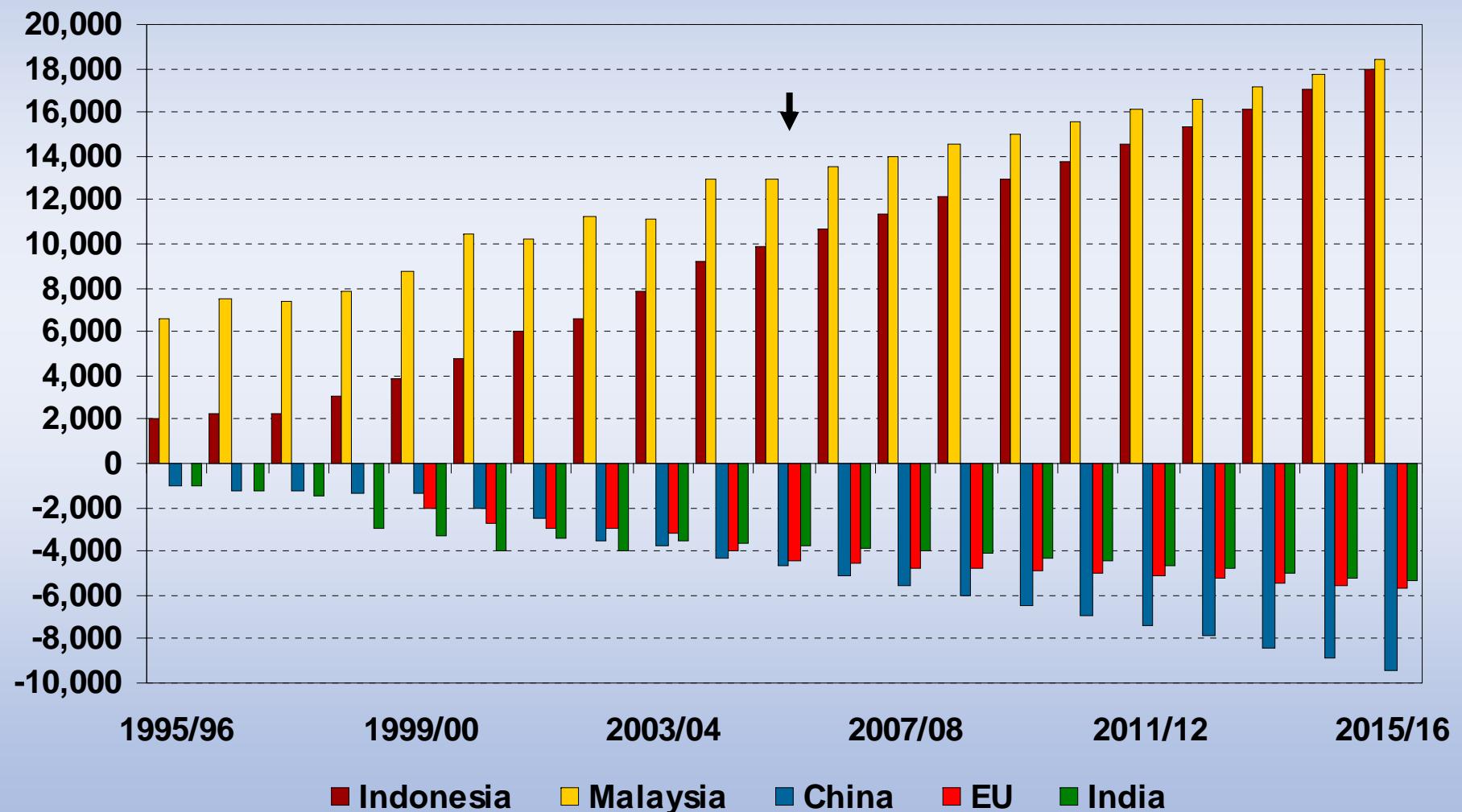


Indonesian Palm Oil Production, Consumption, and Net Trade

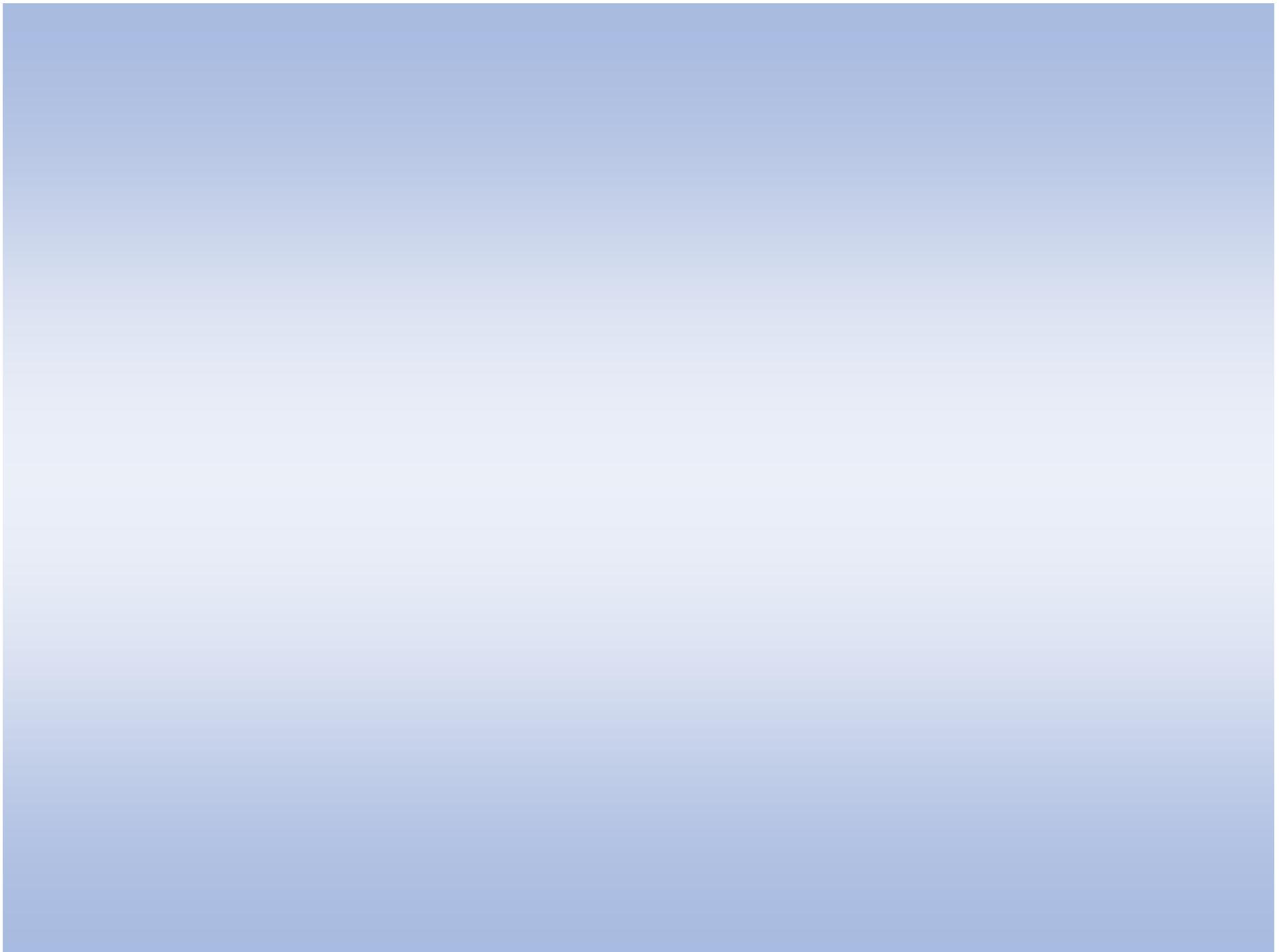


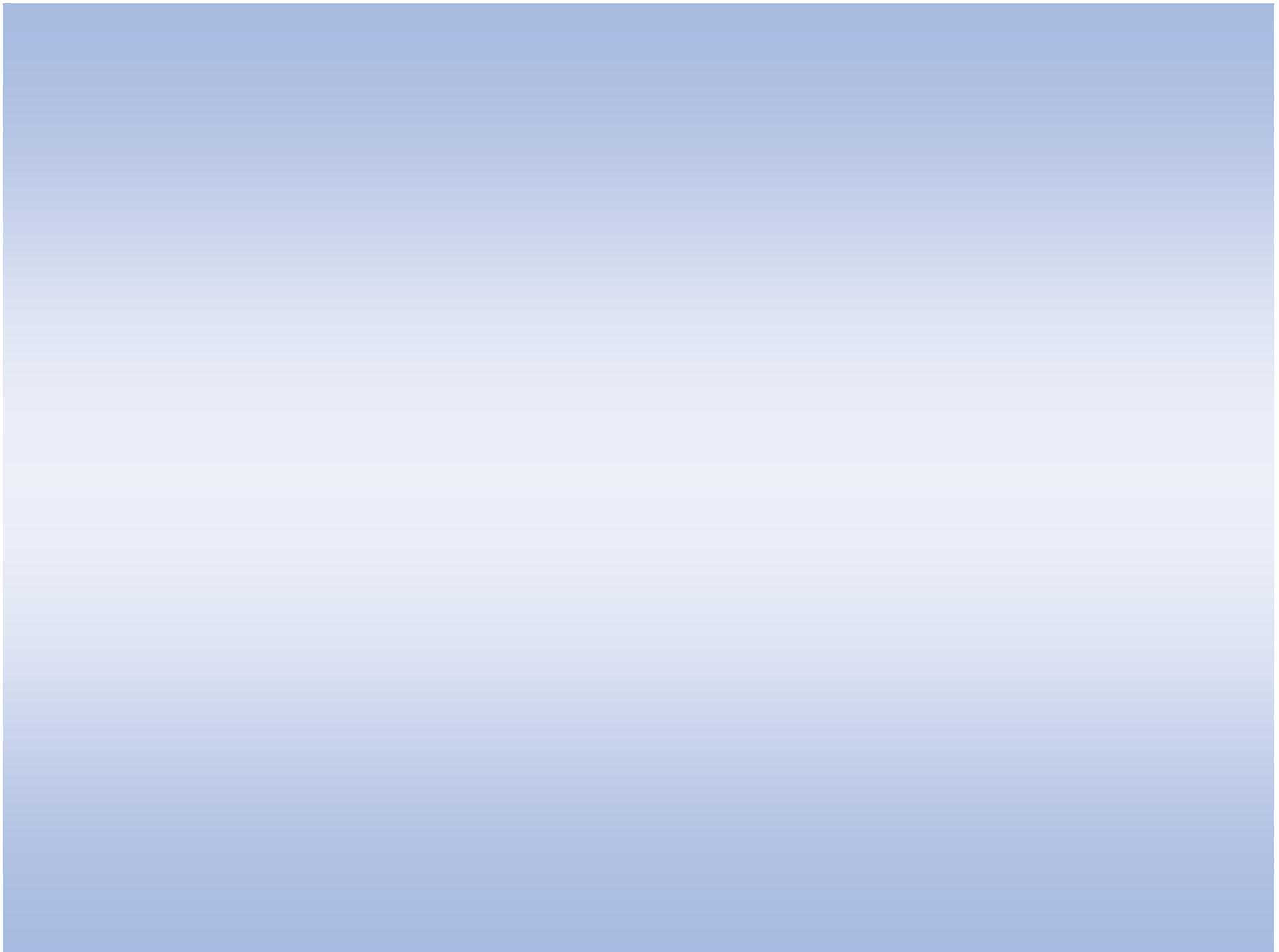
Palm Oil Net Trade

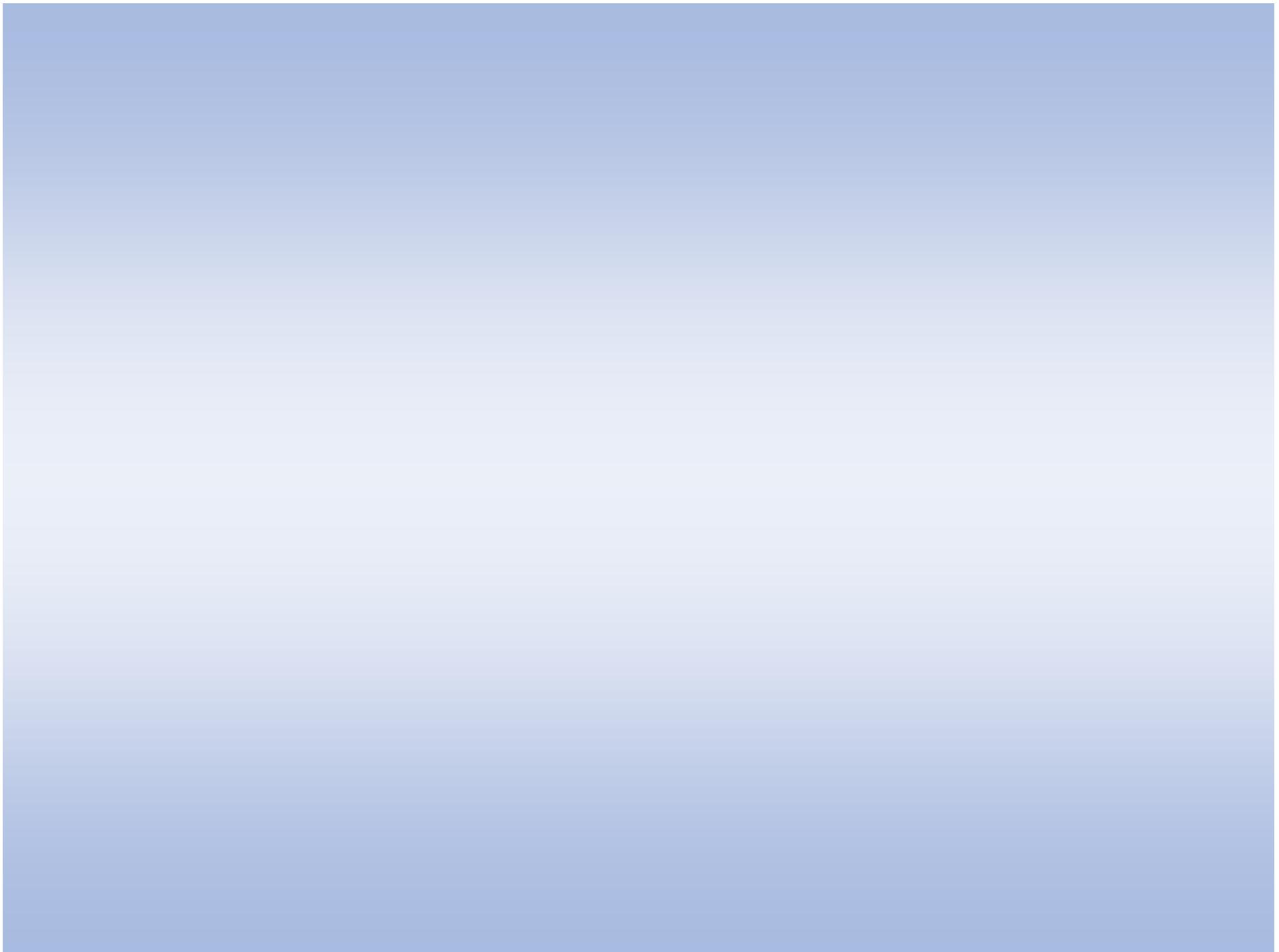
Thousand MT

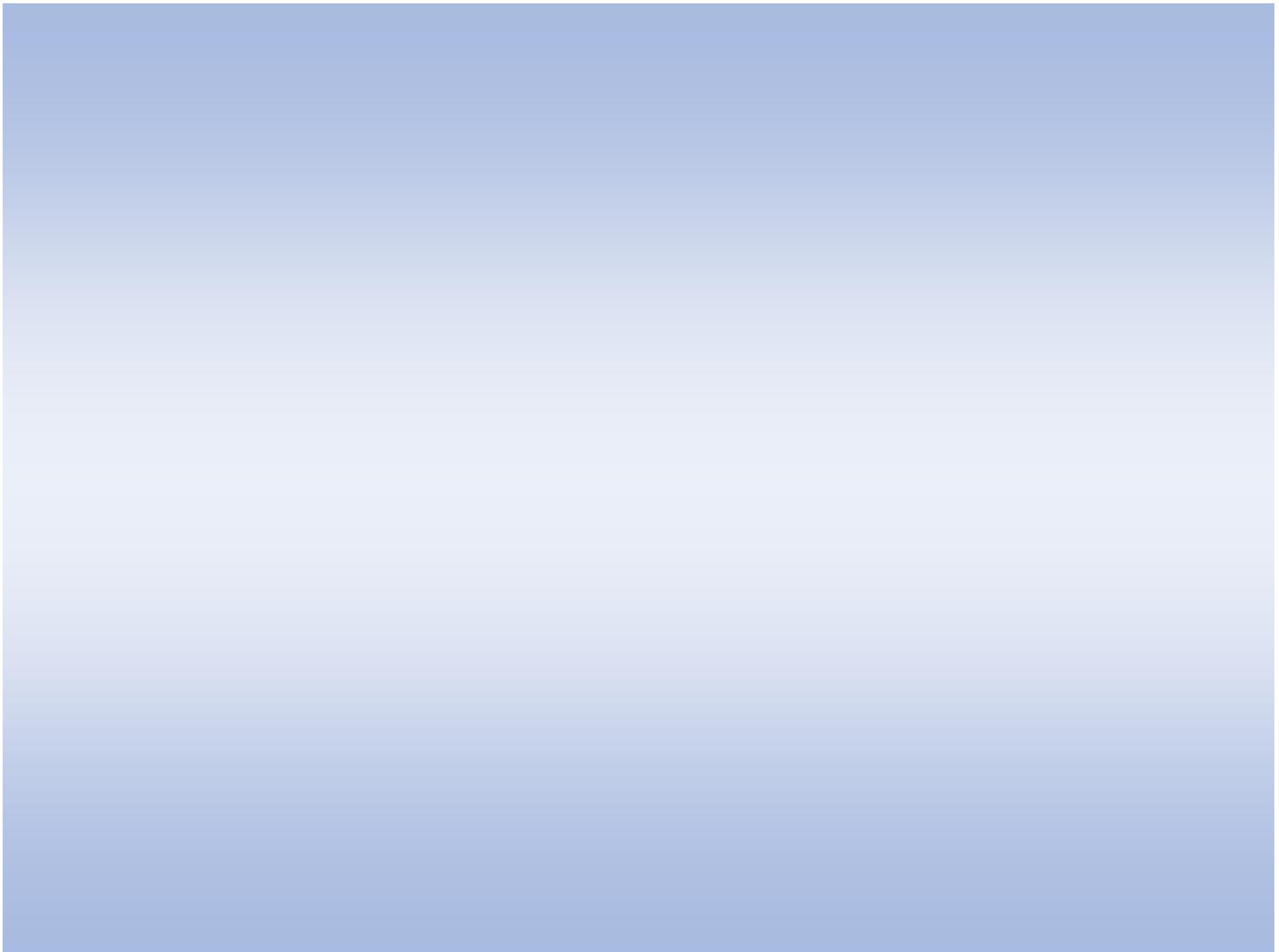


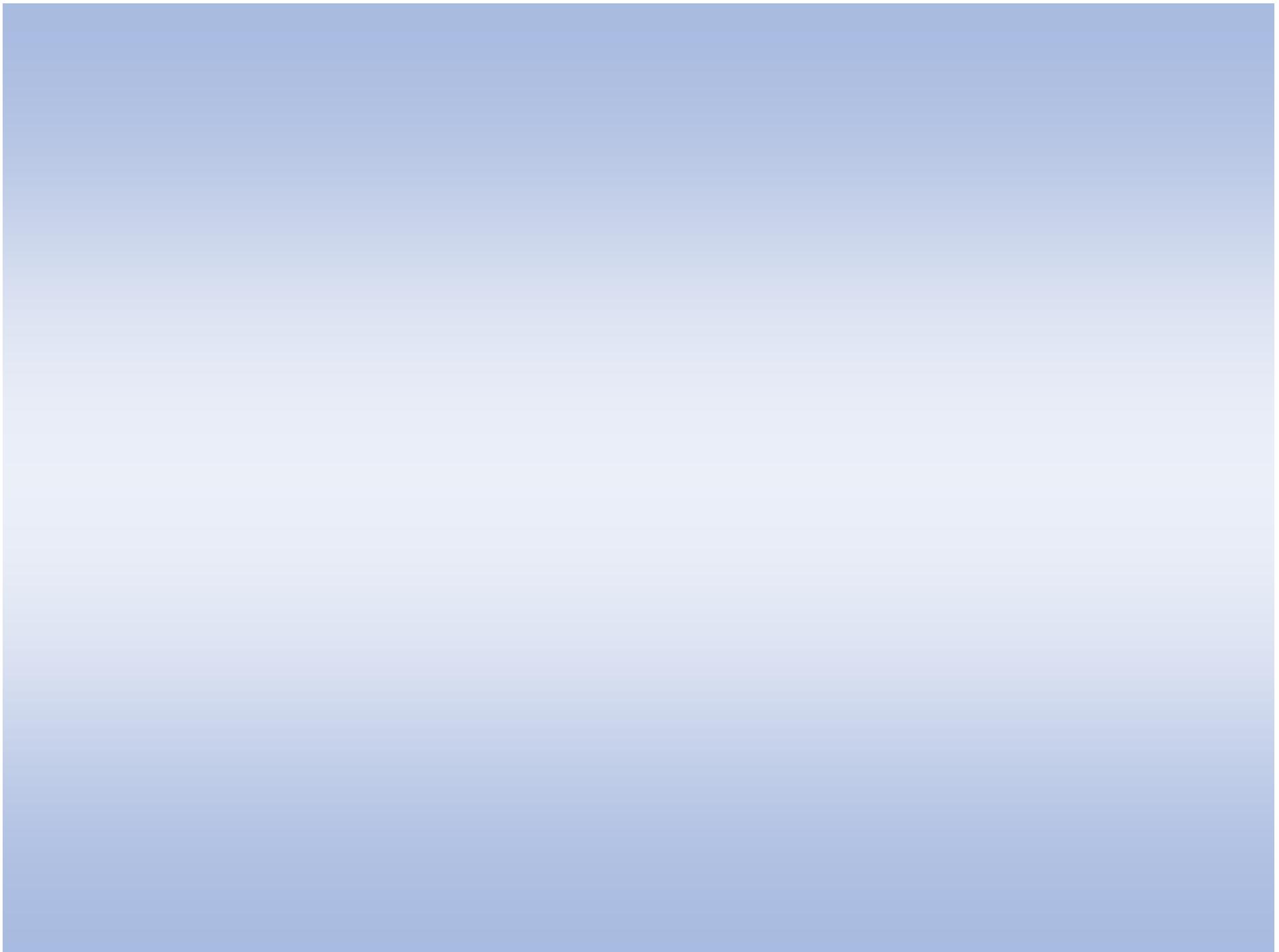
Thank You

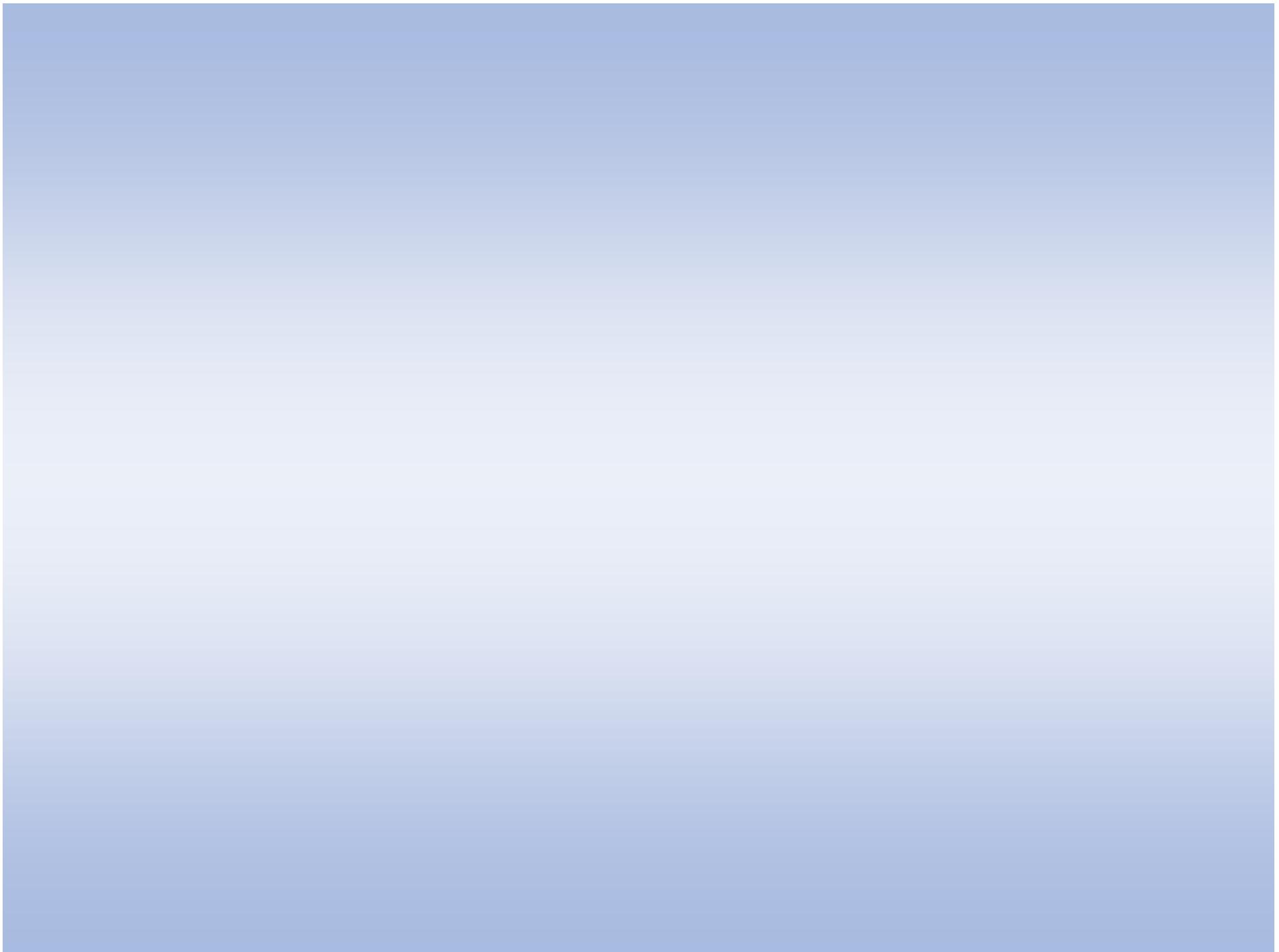


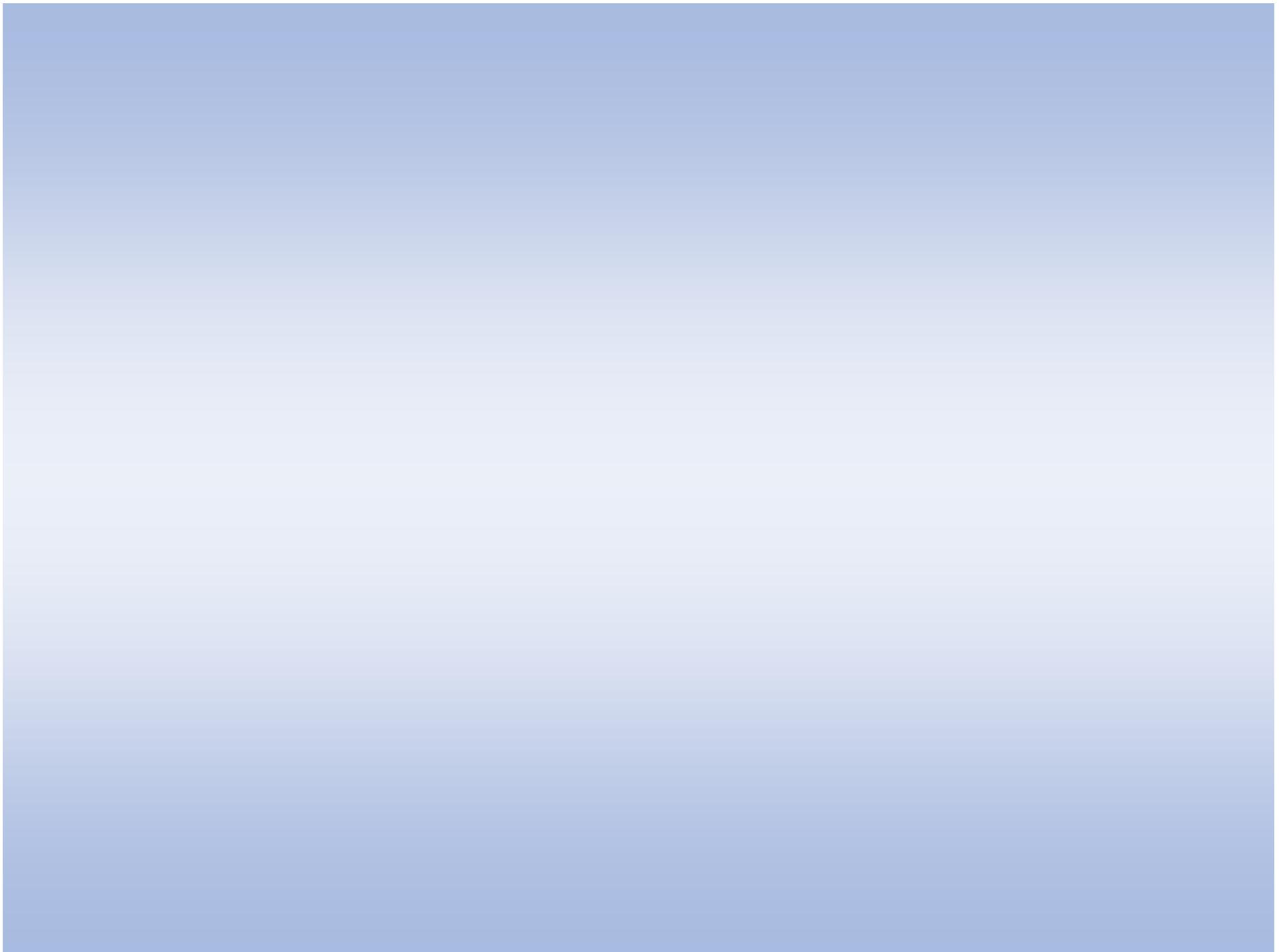






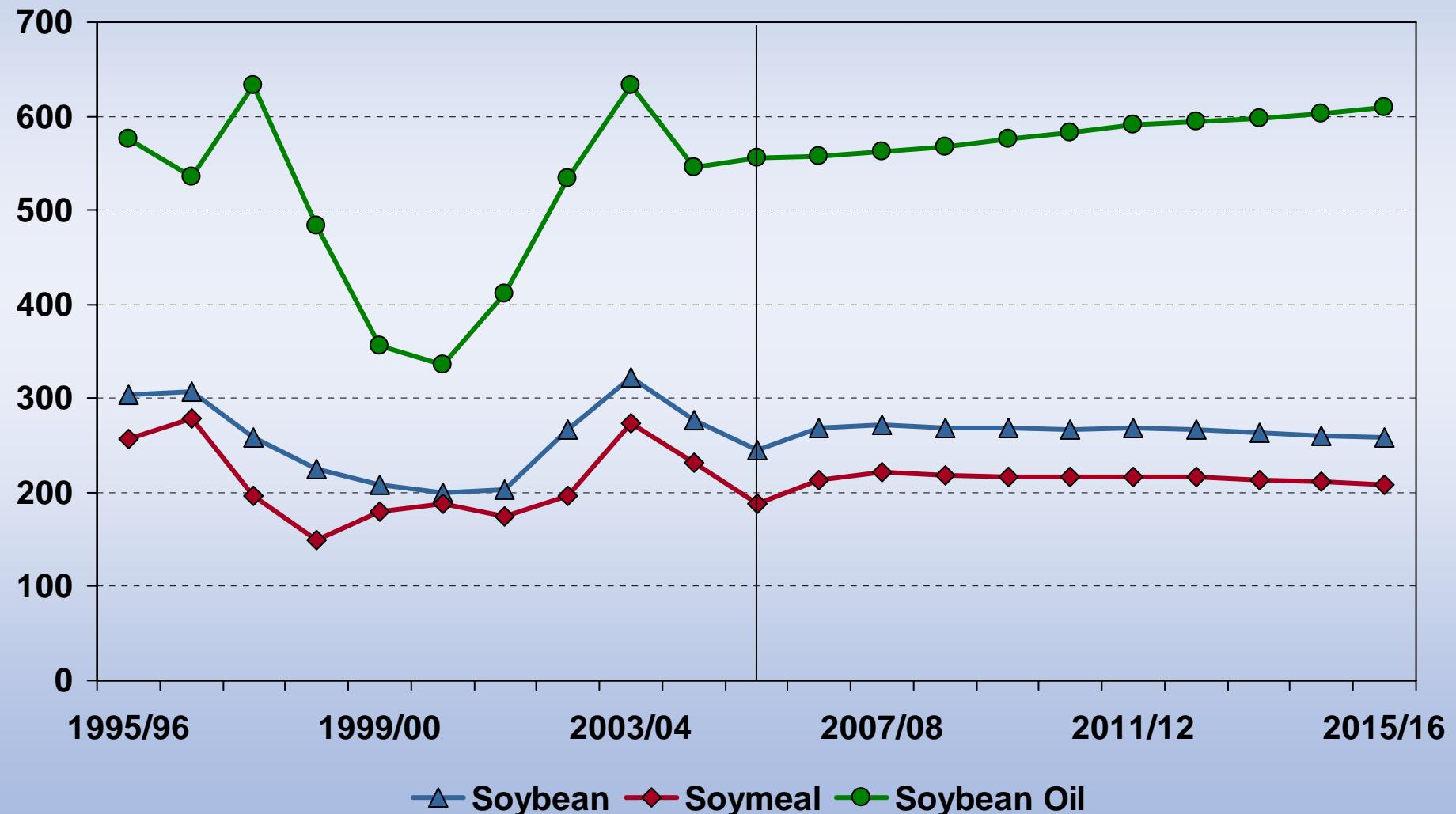






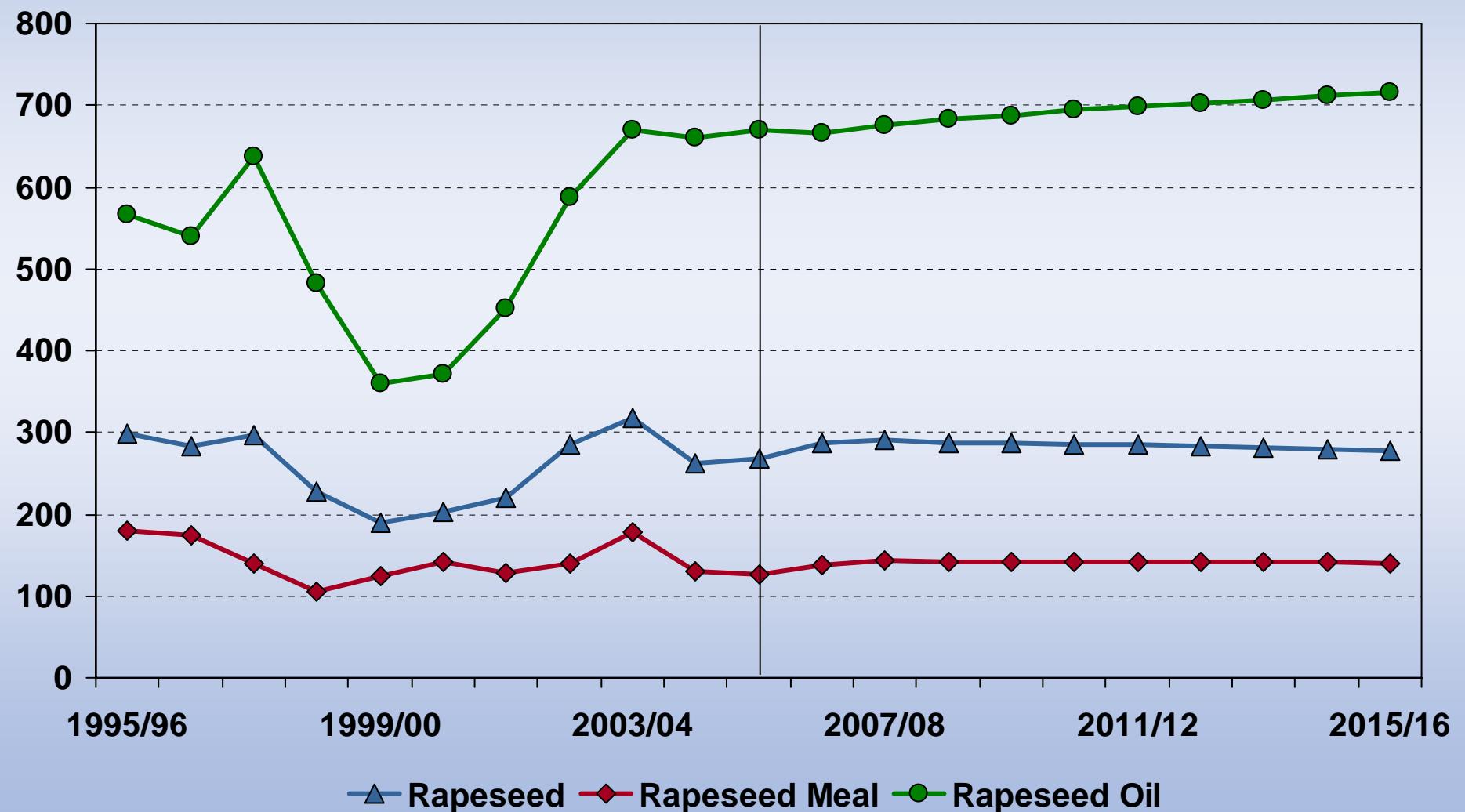
Soybean Complex Rotterdam Prices

Dollars per MT



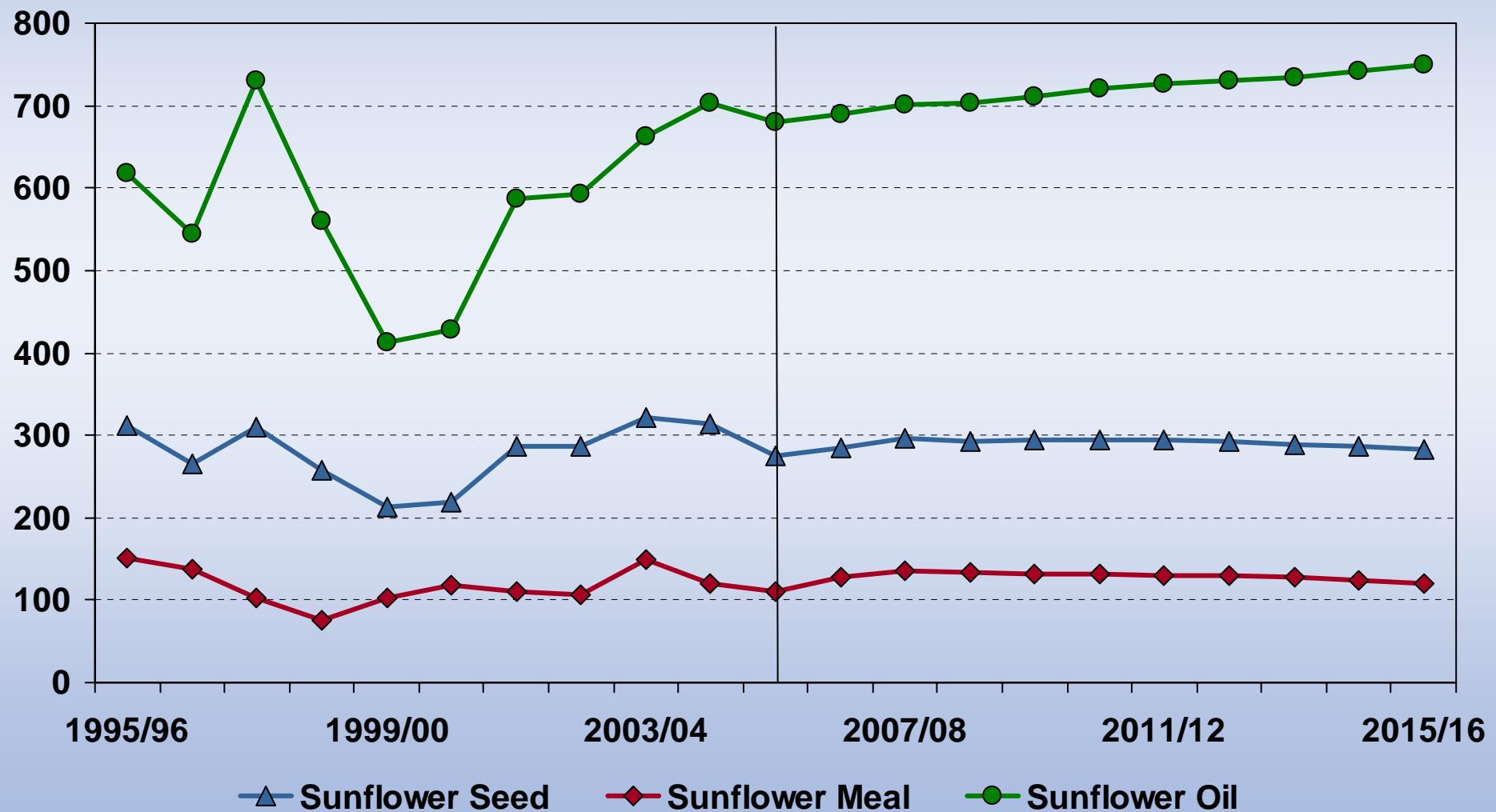
Rapeseed Complex Hamburg Prices

Dollars per MT



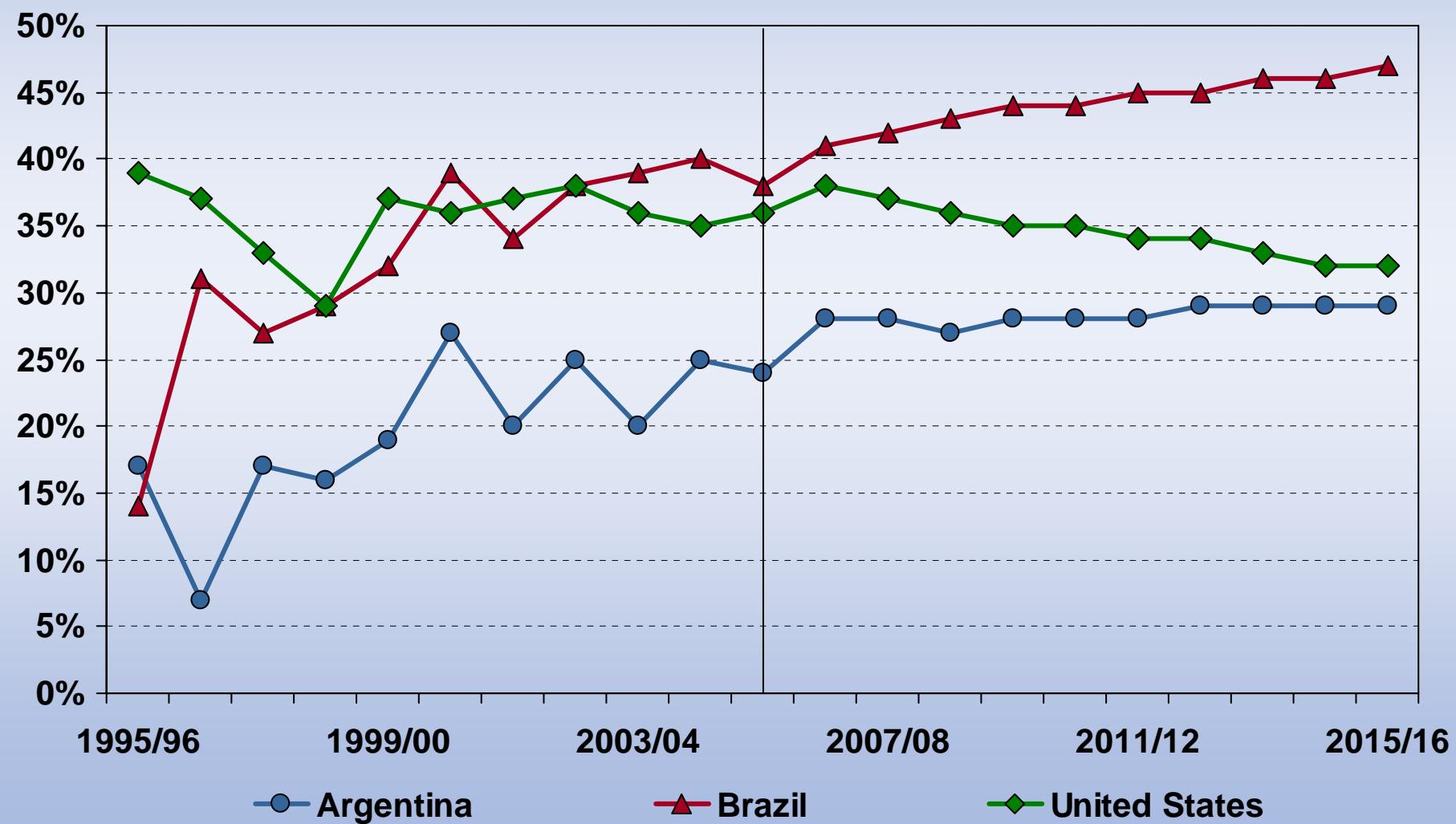
Sunflower Complex Rotterdam Prices

Dollars per MT



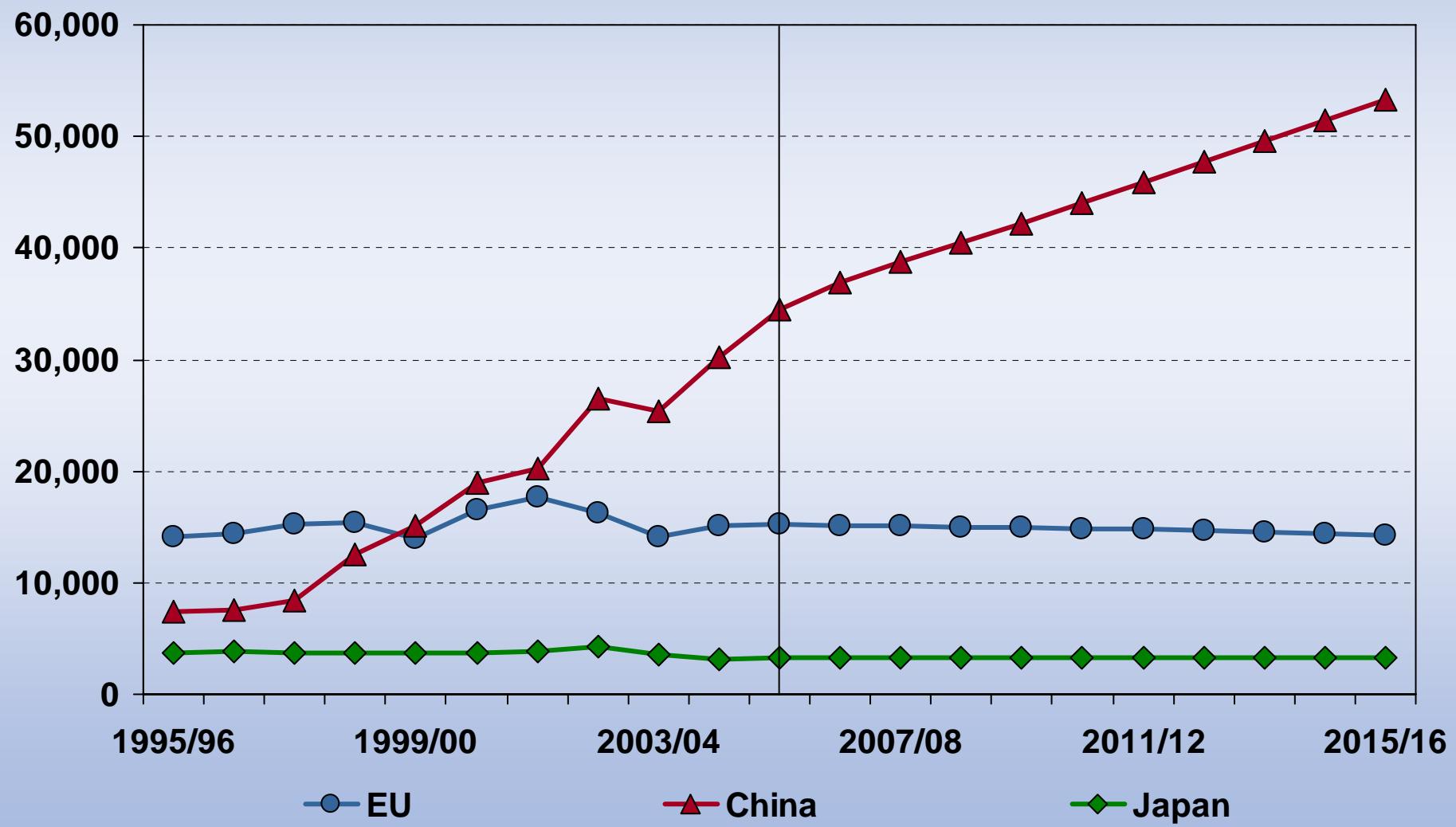
Export – Production Ratio of Major Soybean Exporters

Percent



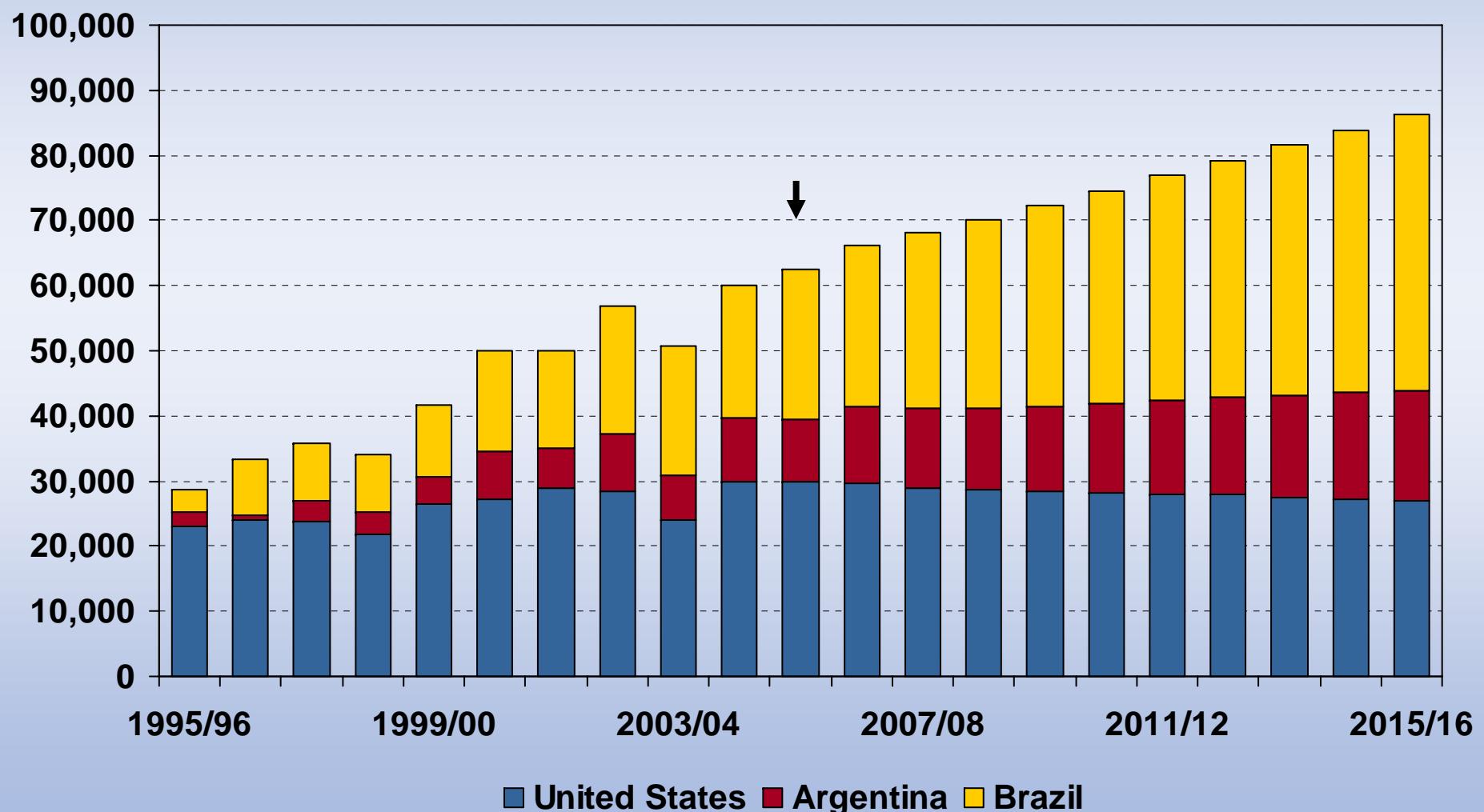
Soybean Crush in Major Importing Countries

Thousand MT



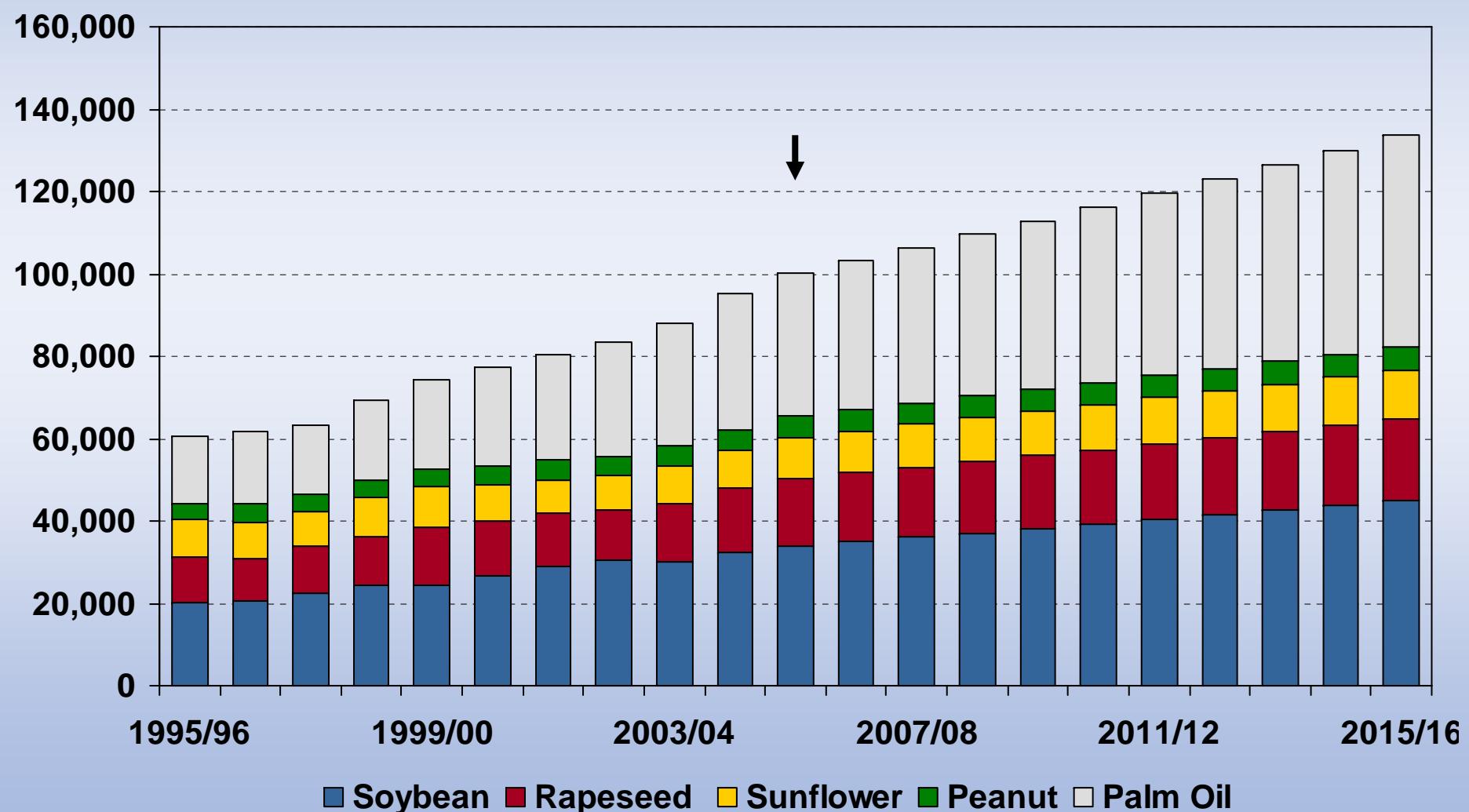
Major Soybean Exporters

Thousand MT

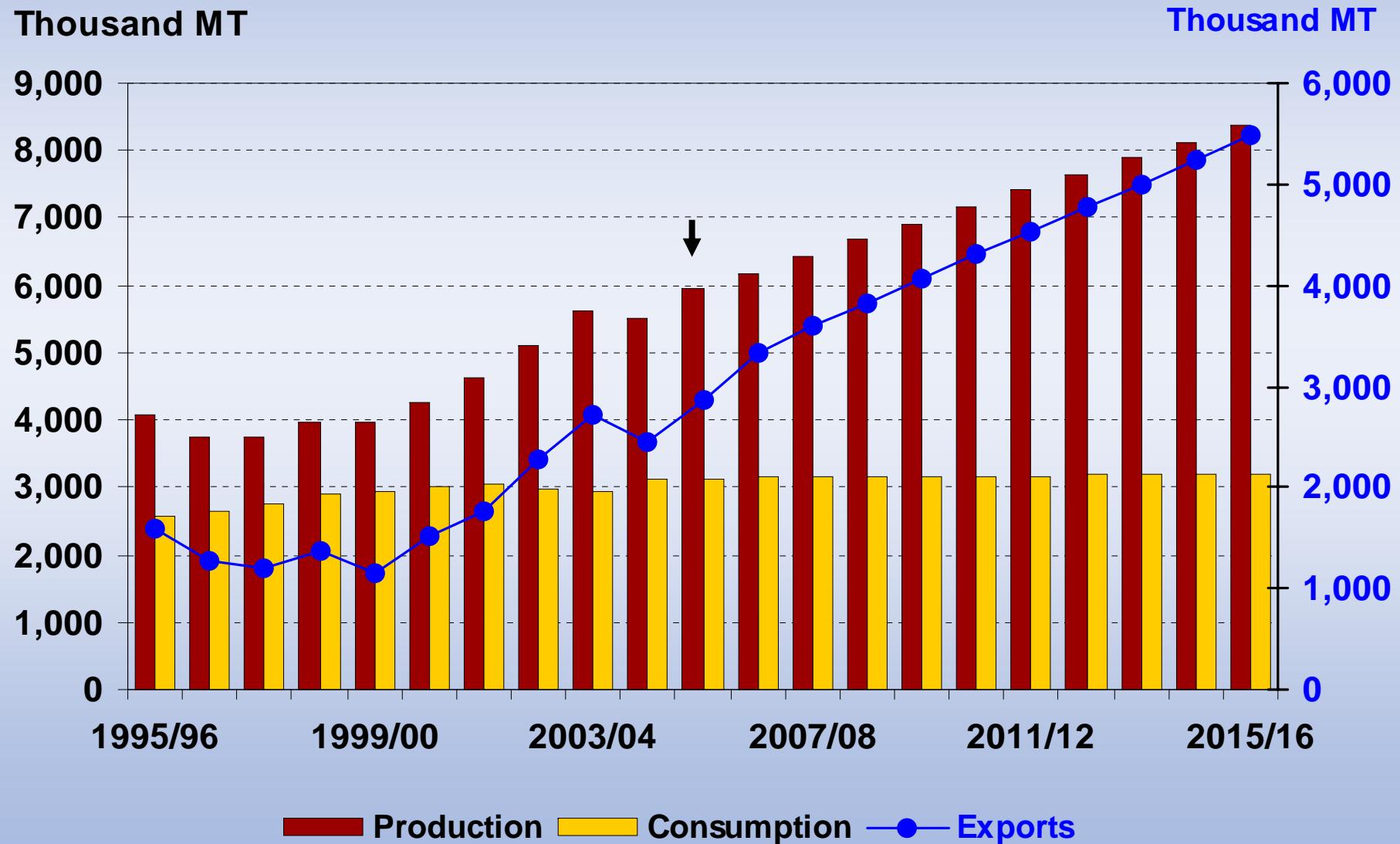


World Vegetable Oil Production

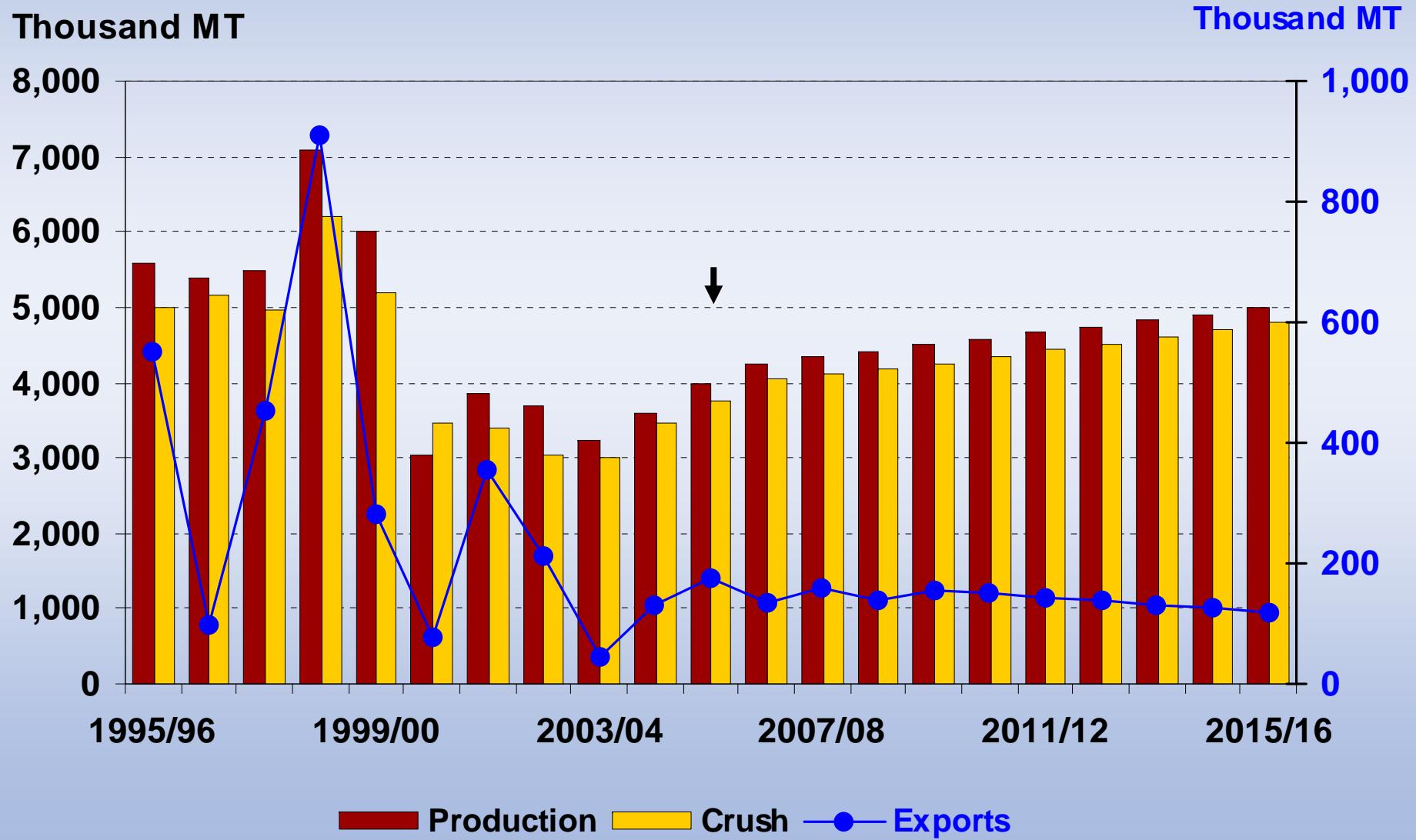
Thousand MT



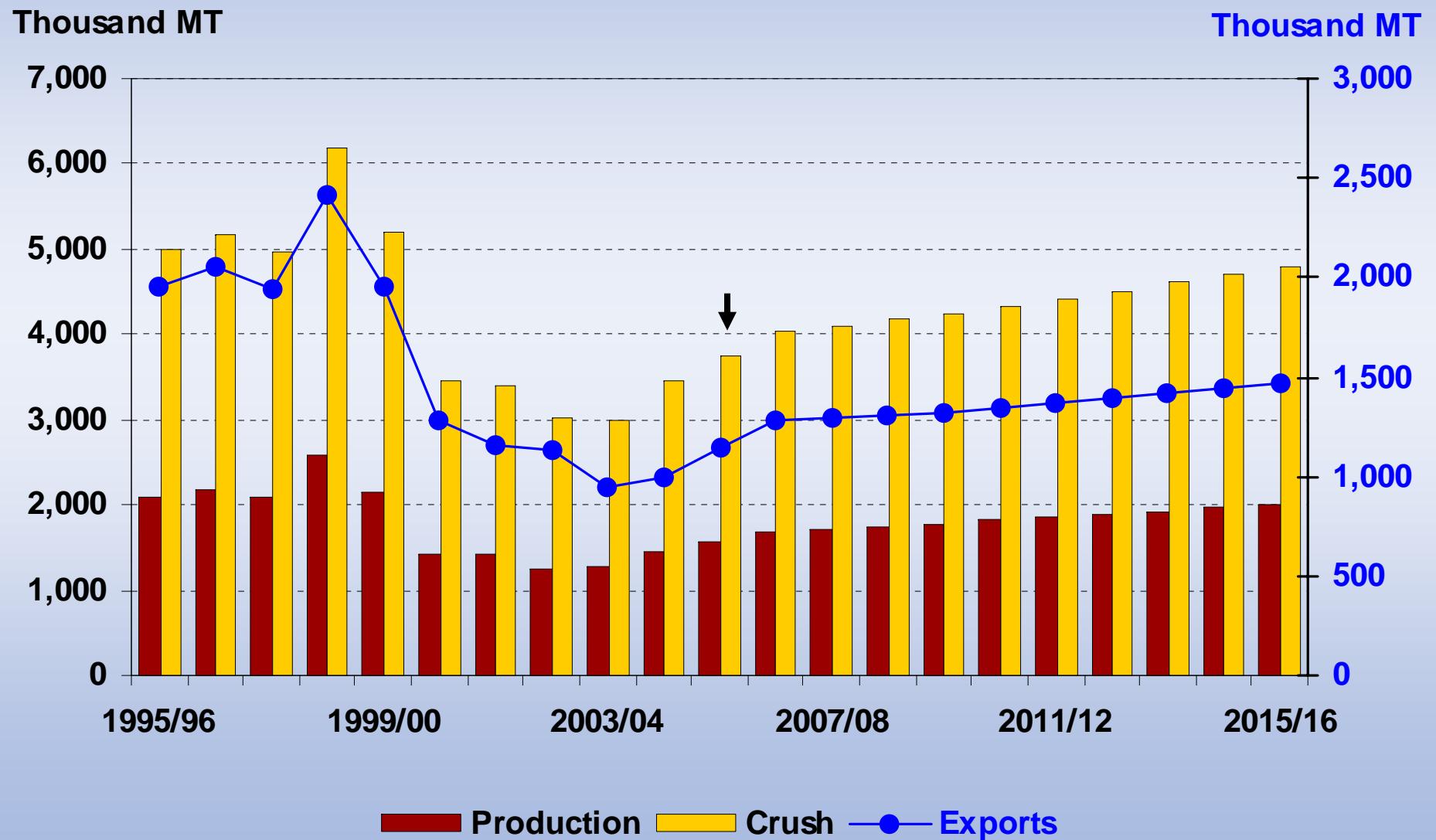
Brazilian Soybean Oil Production, Consumption and Exports



Argentinean Sunflower Production, Crush, and Exports

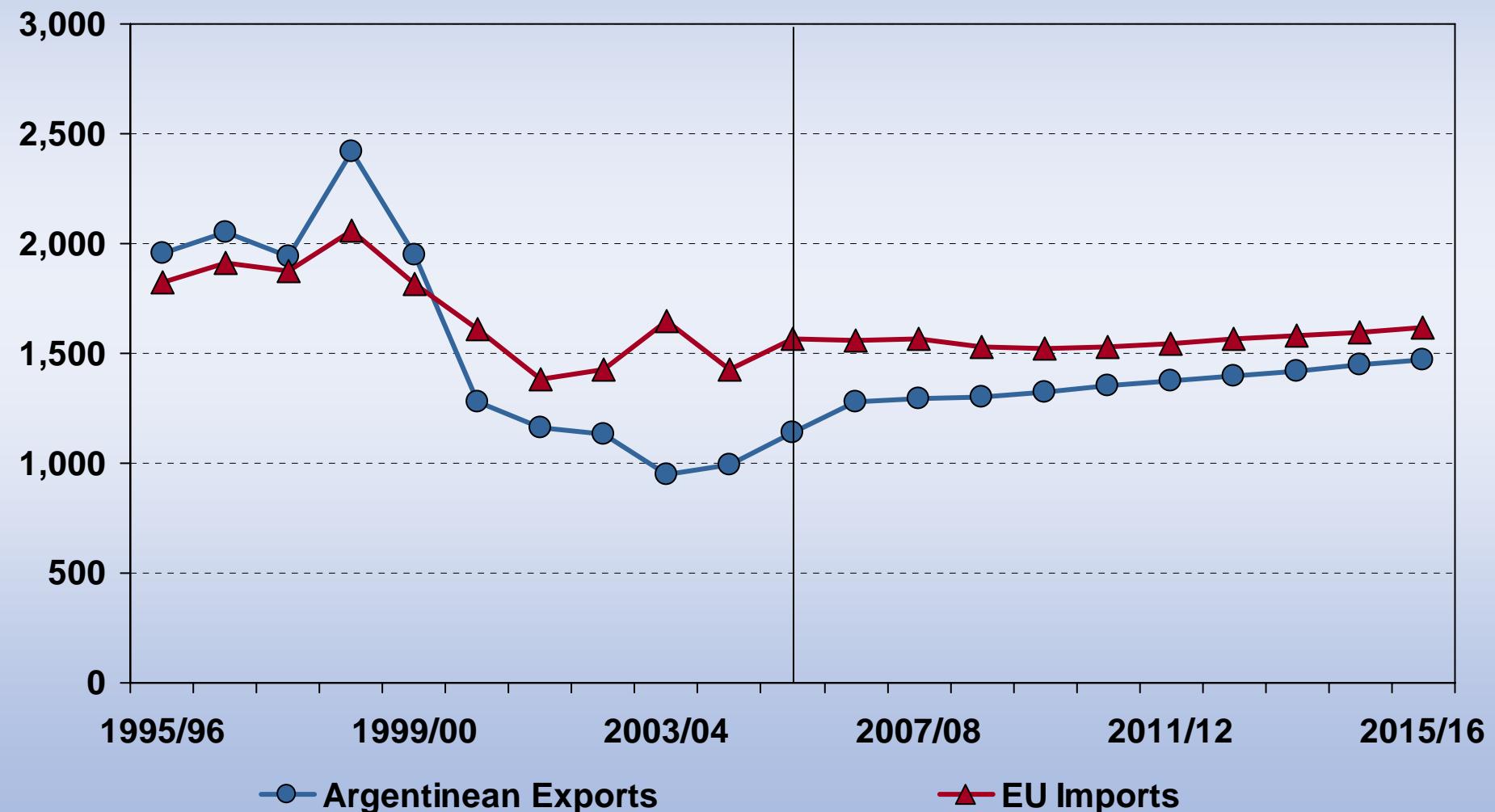


Argentinean Sunflower Meal Production and Utilization

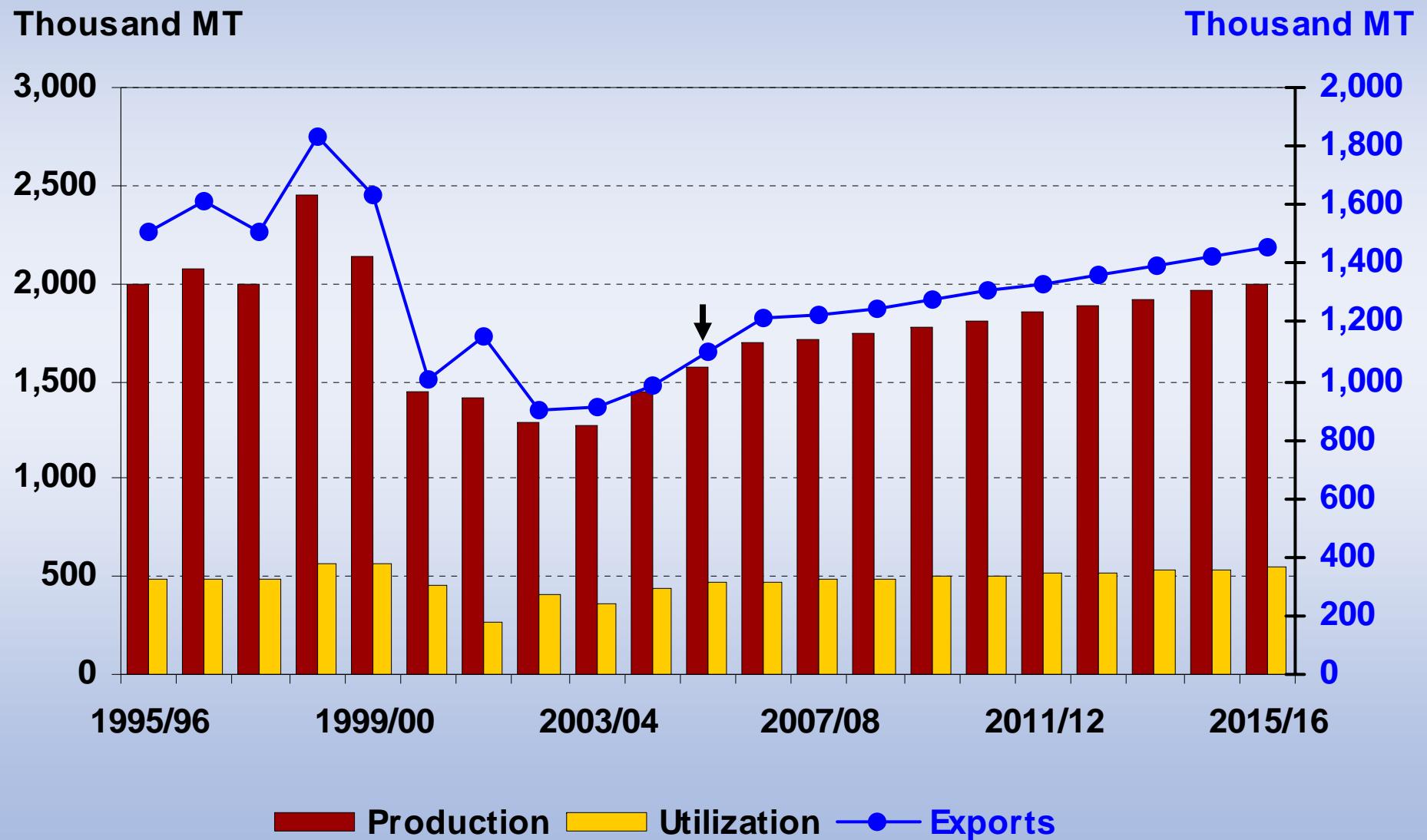


Argentinean Sunflower Meal Exports and EU Imports

Thousand MT



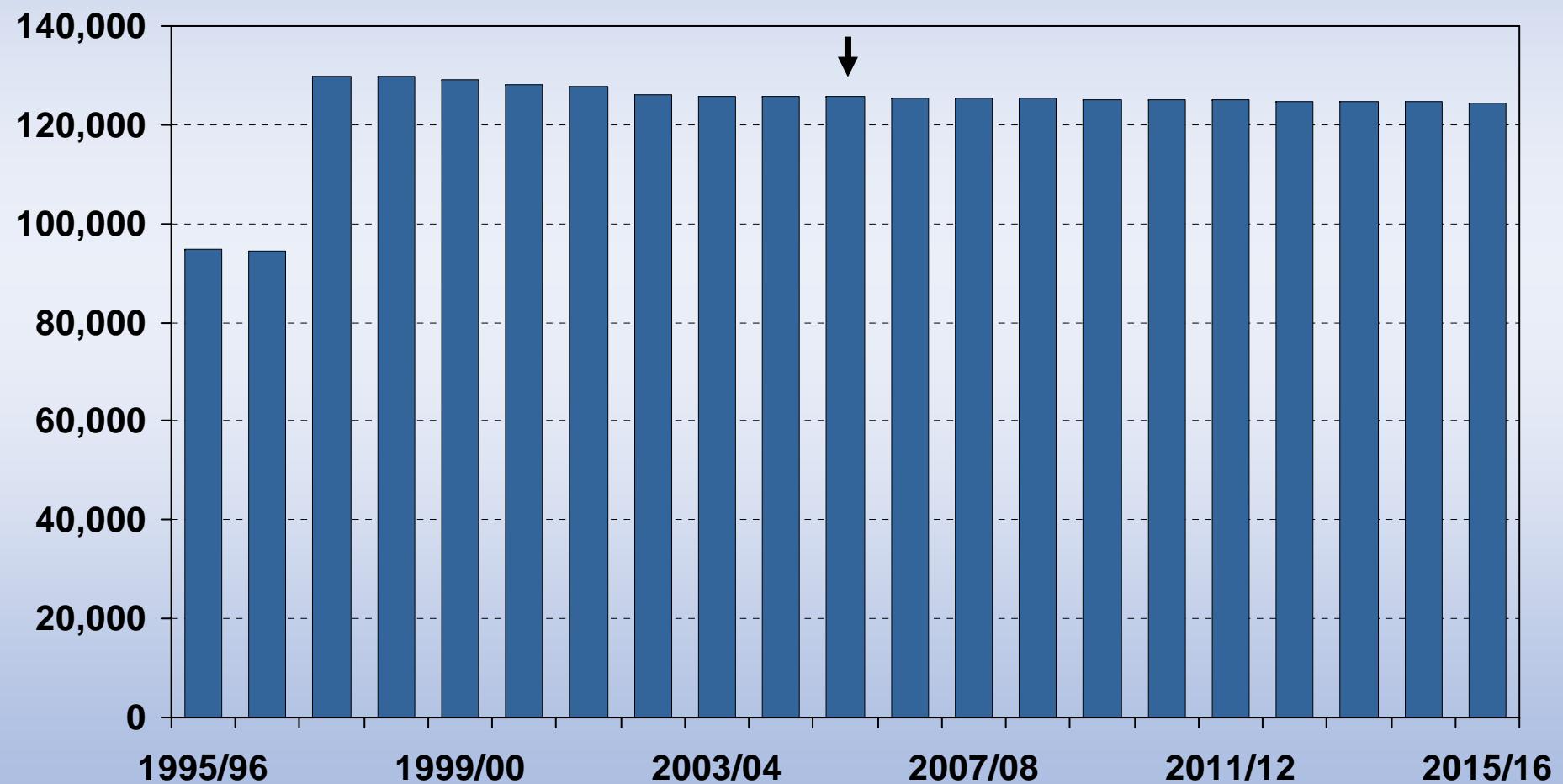
Argentinean Sunflower Oil Supply and Utilization





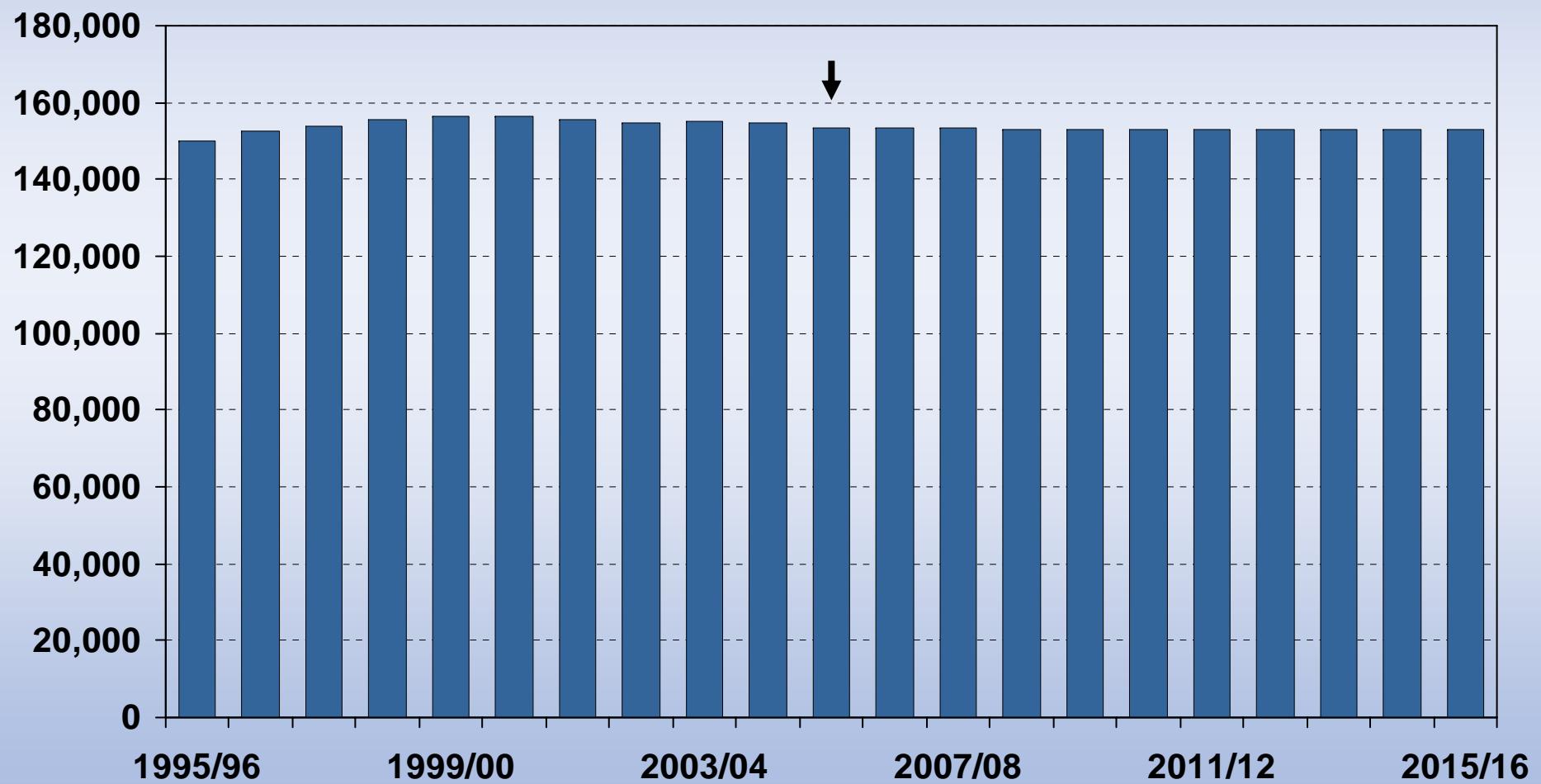
Chinese Cultivated Area

Thousand
Hectares

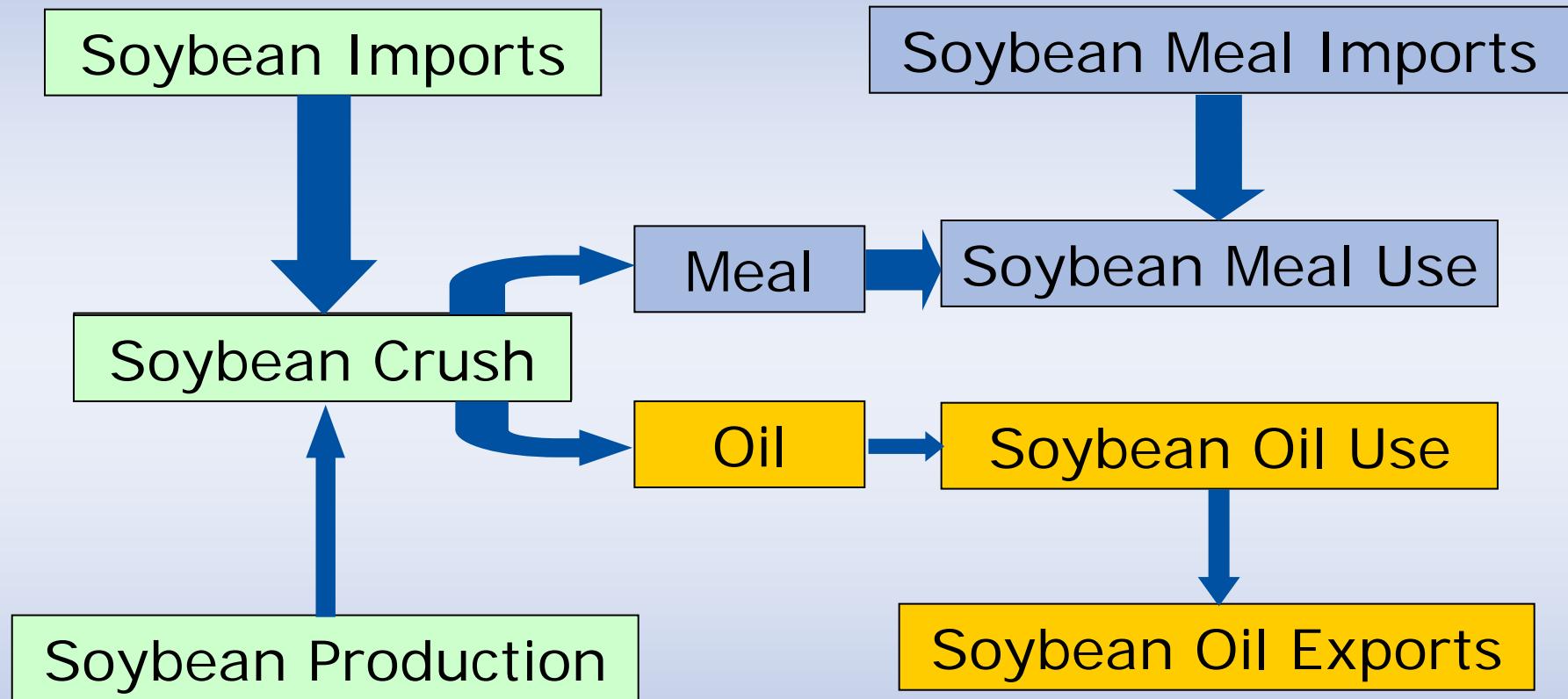


Chinese Total Sown Area

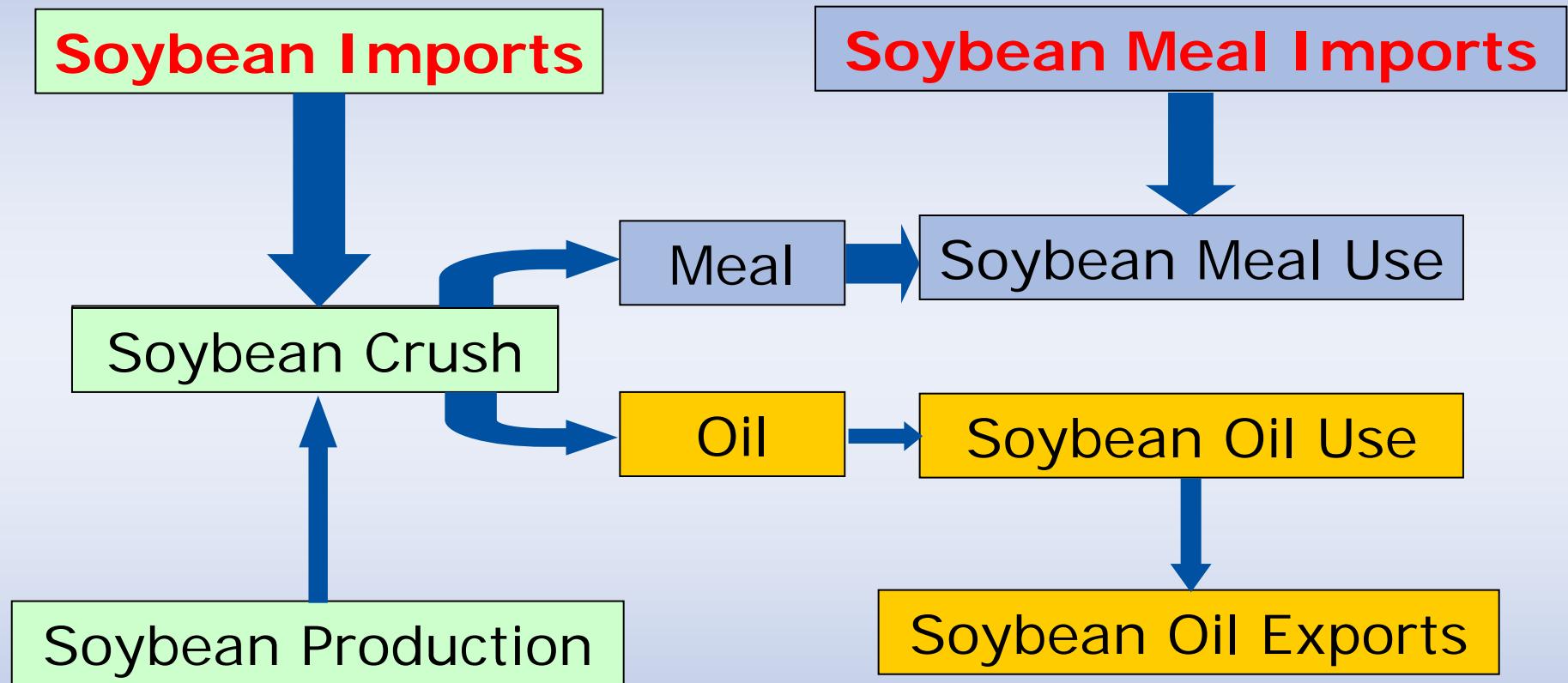
Thousand
Hectares



EU Soybean Market

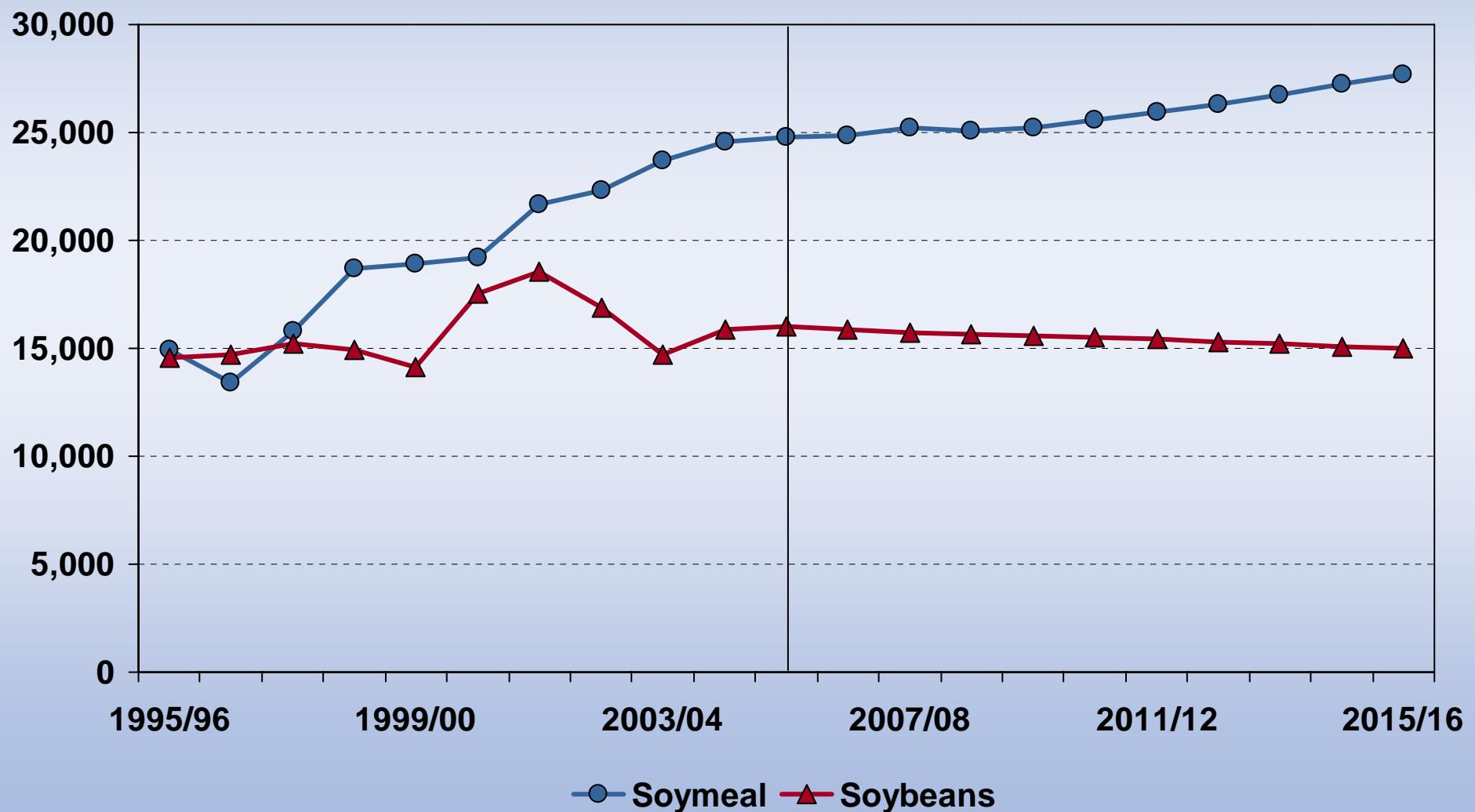


EU Soybean Market



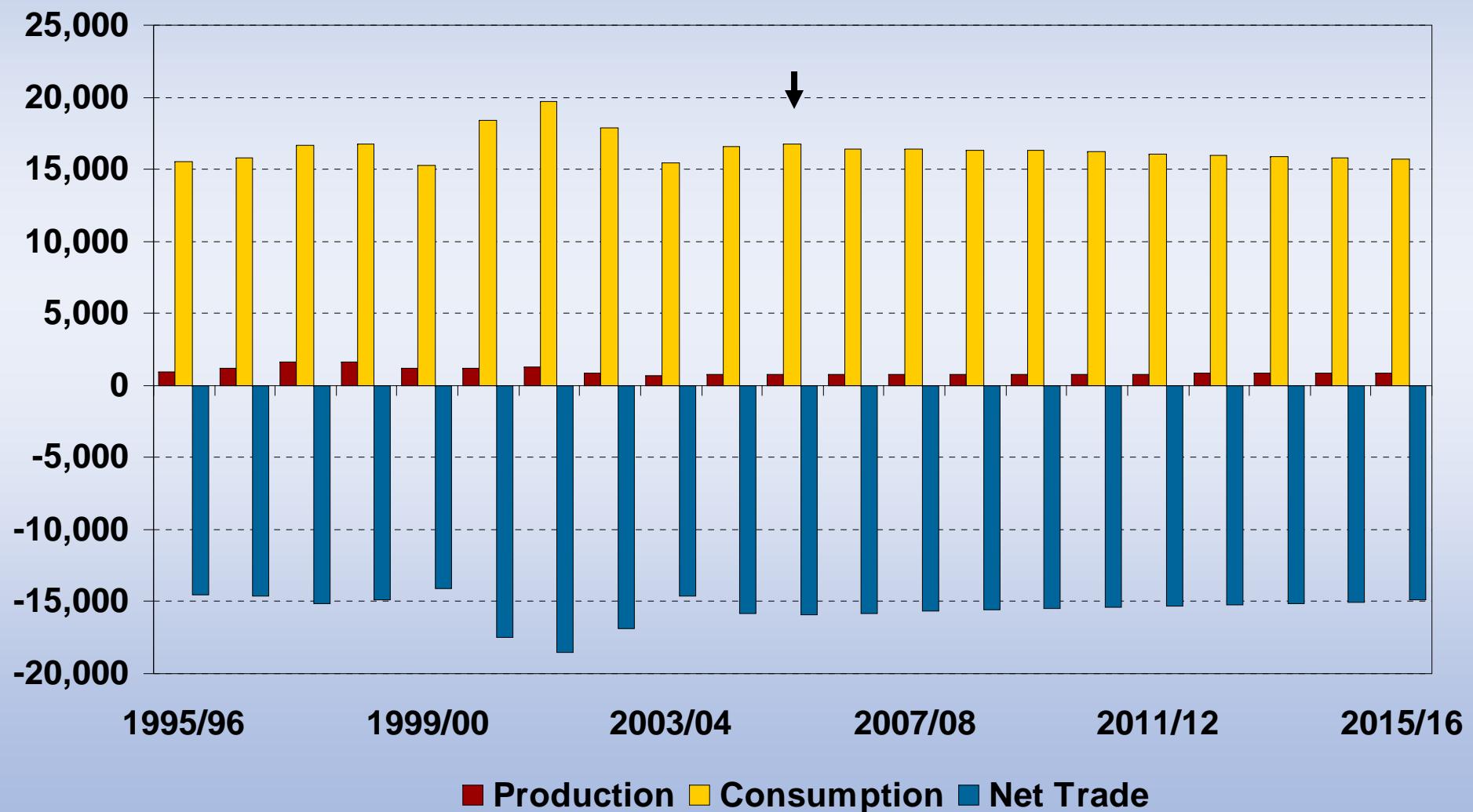
EU Soybean and Meal Imports

Thousand MT



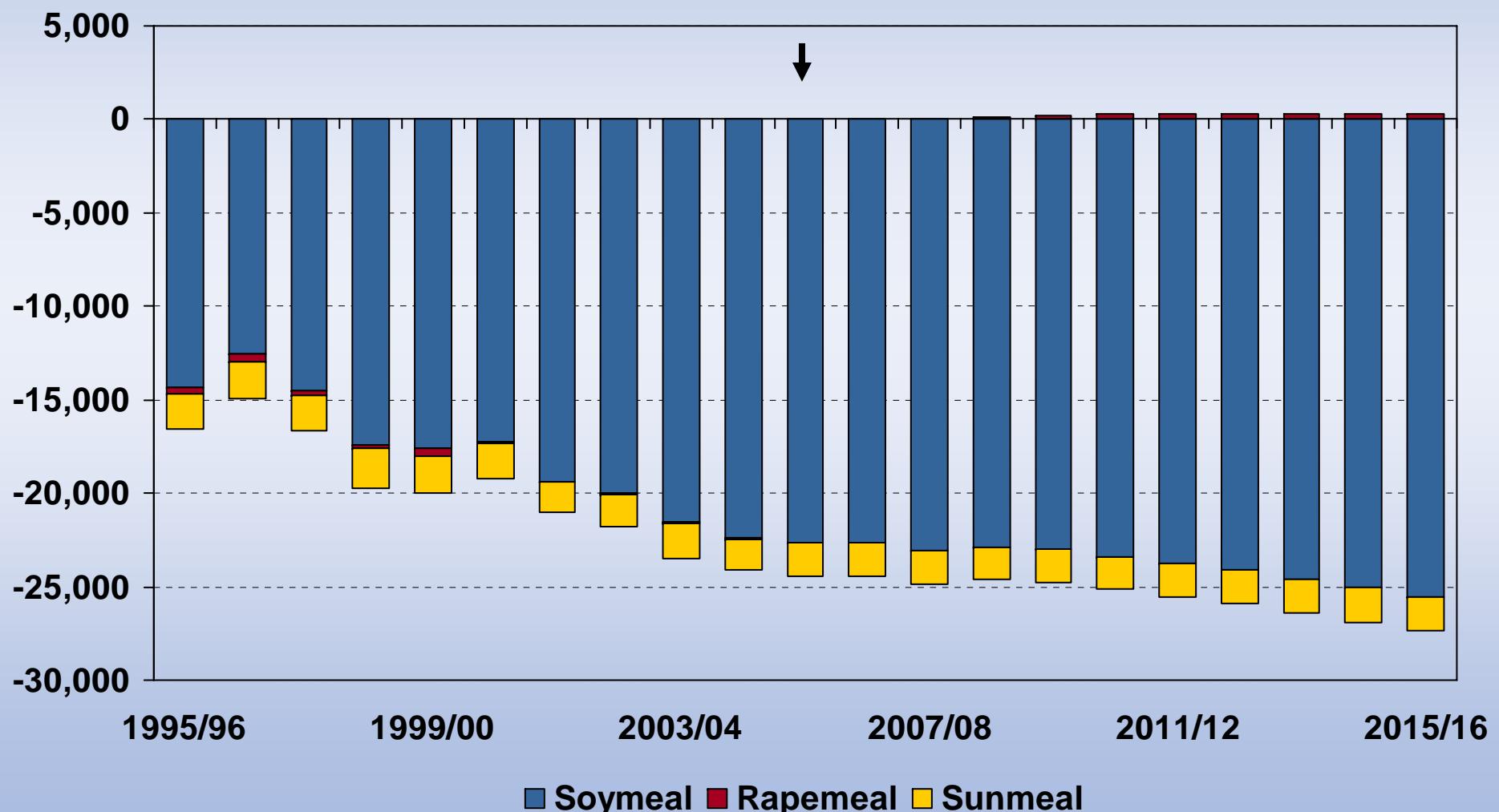
EU Soybean Production, Consumption and, Net Trade

Thousand MT



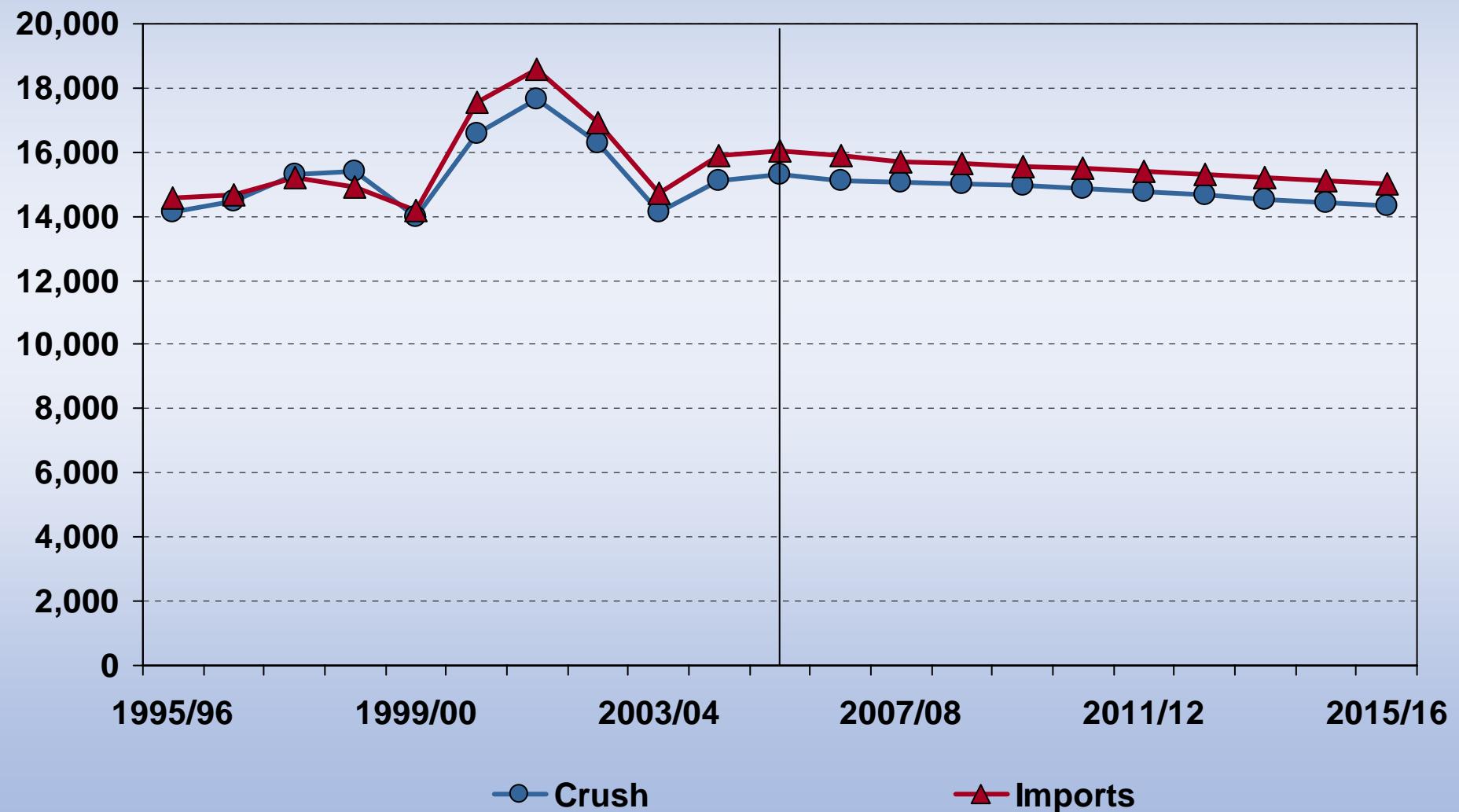
EU Oilseed Meal Trade

Thousand MT



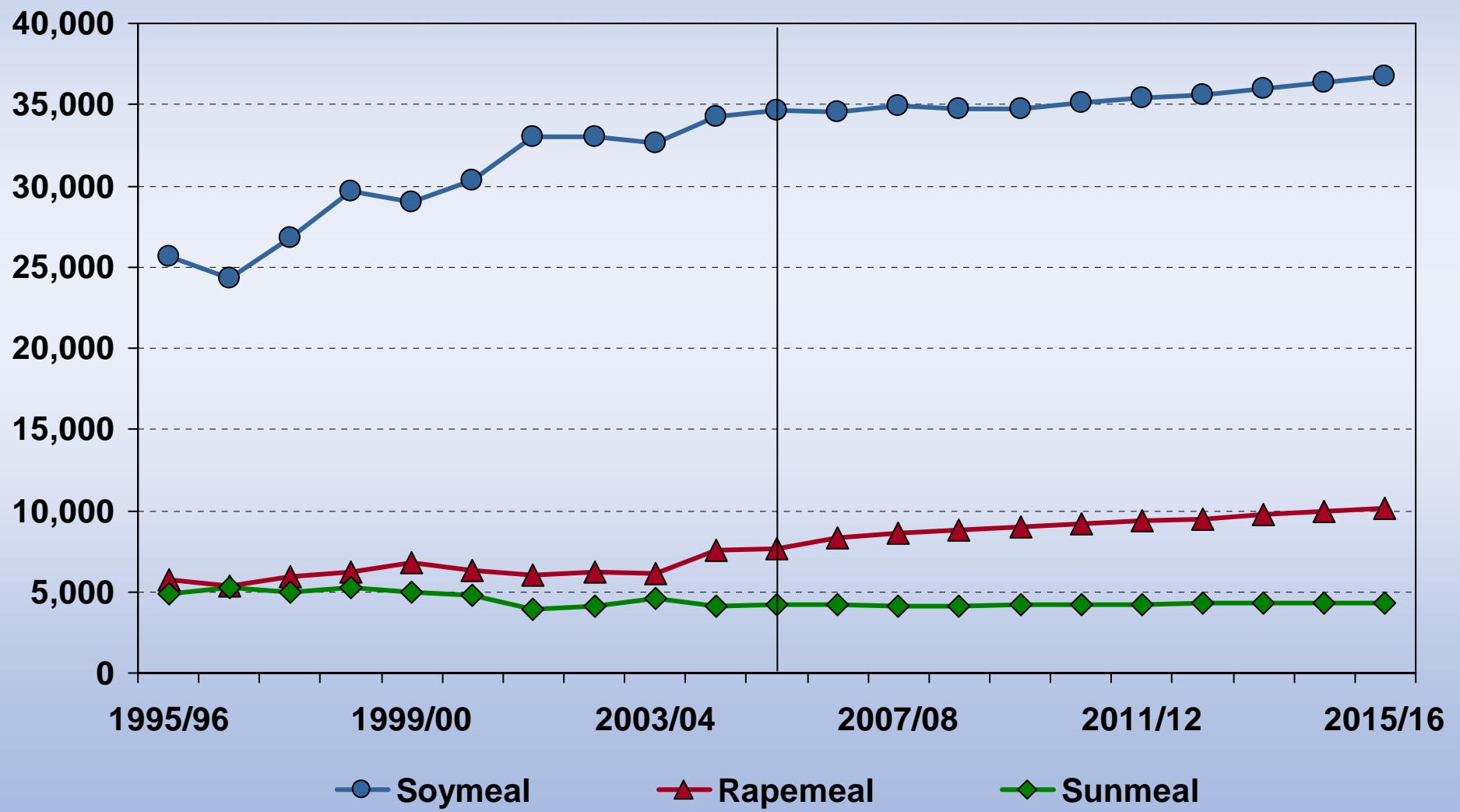
EU Soybean Crush and Imports

Thousand MT

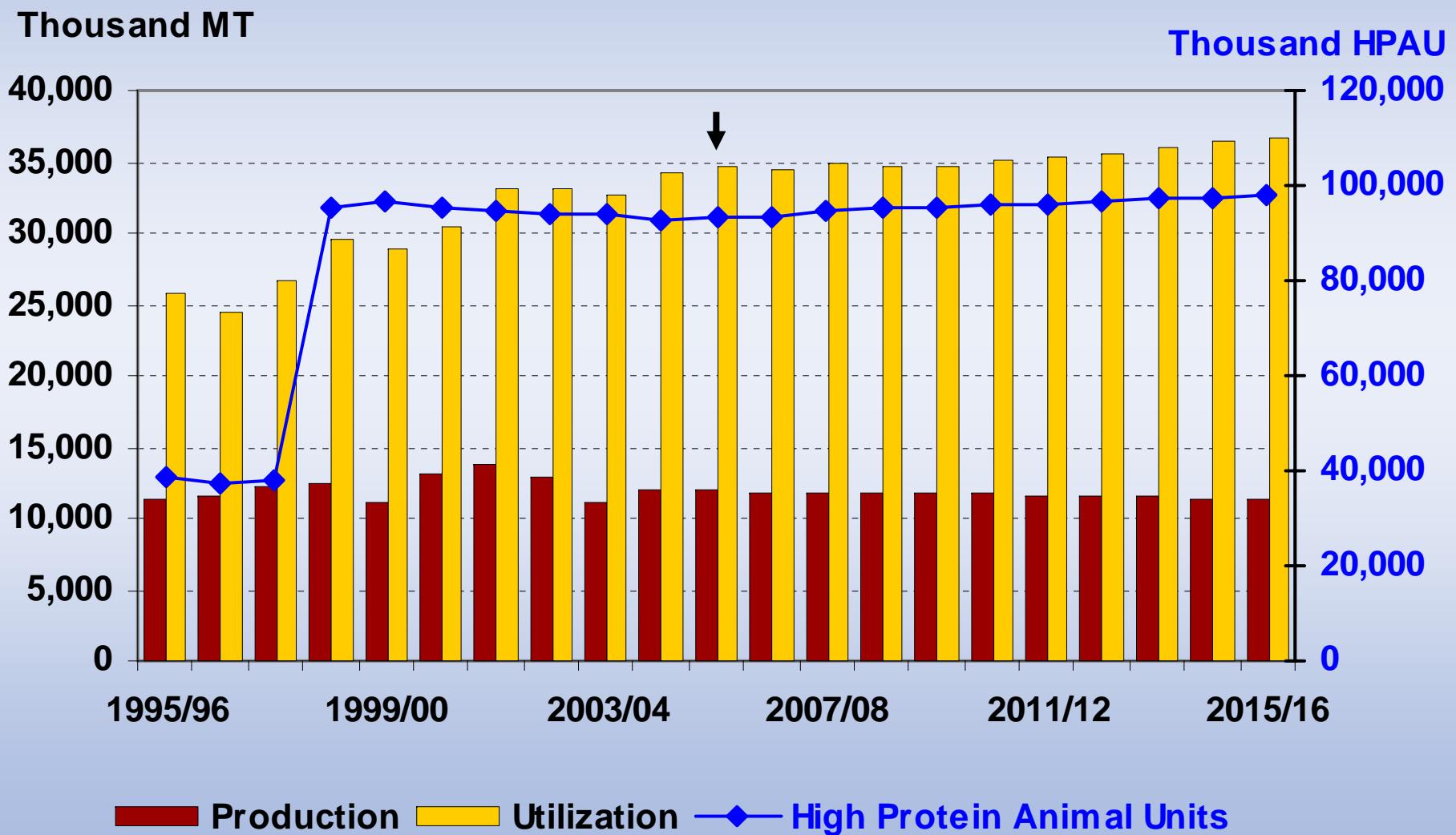


EU Protein Meal Utilization

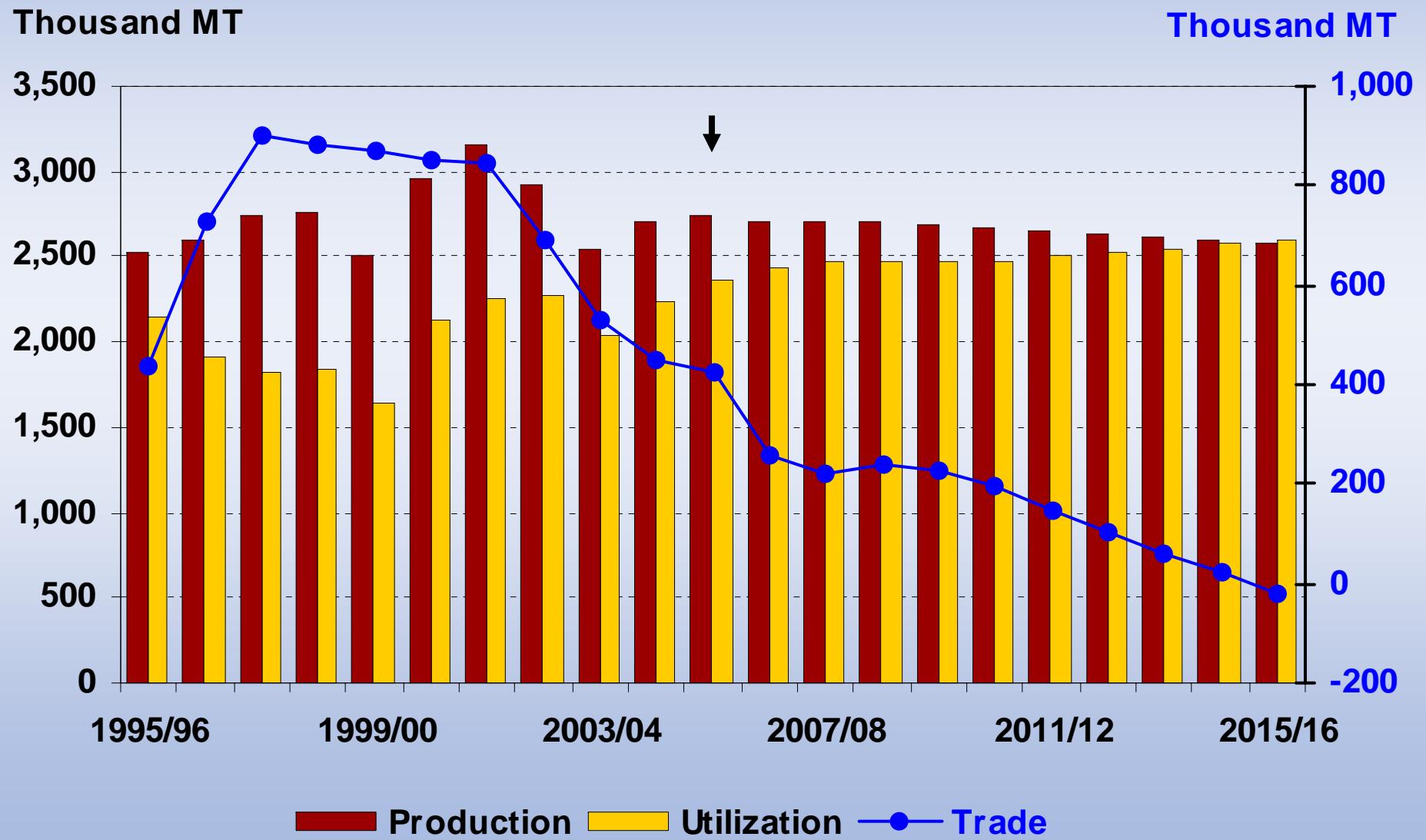
Thousand MT



EU Soybean Meal Utilization and HPAU

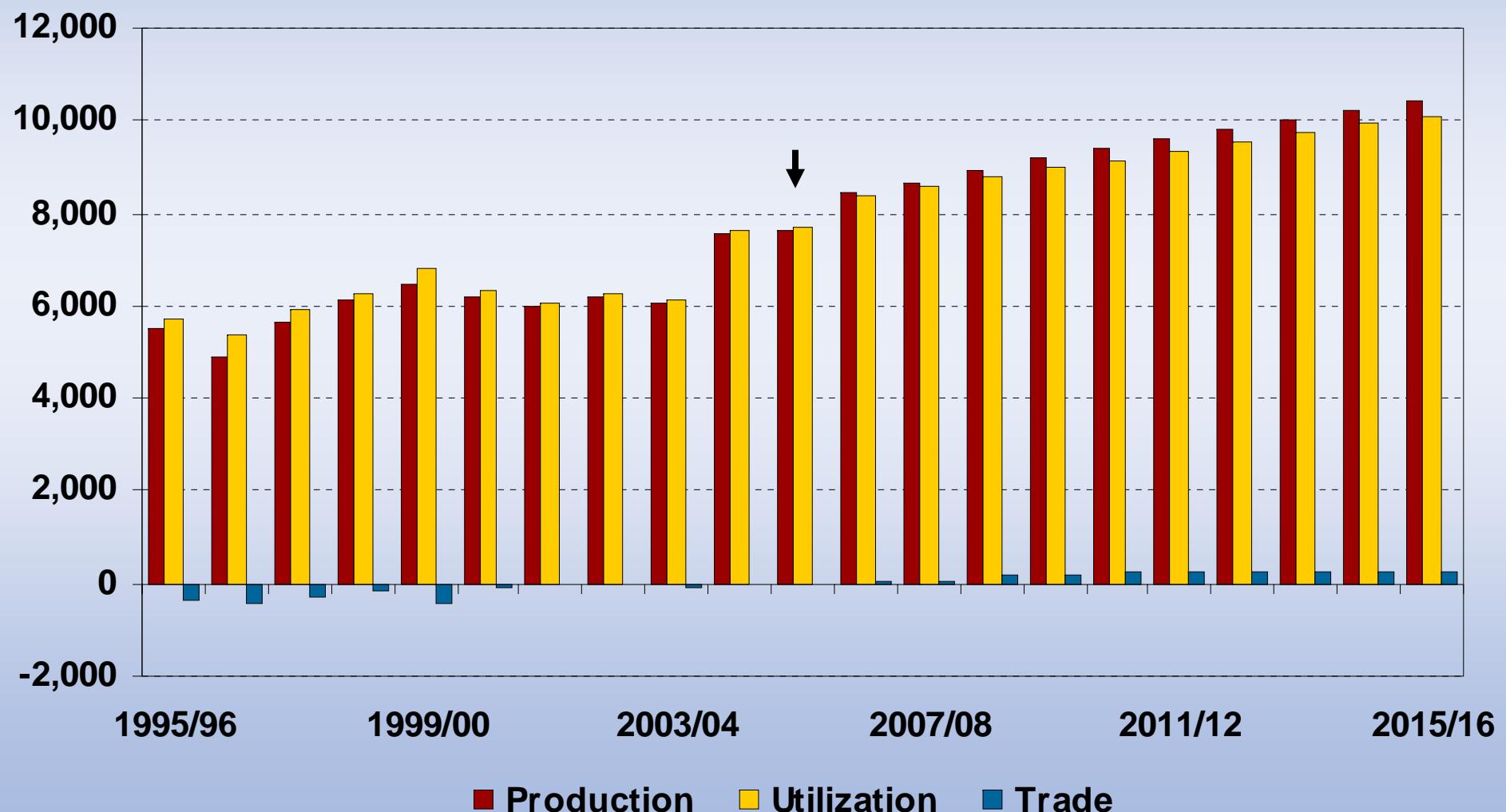


EU Soybean Oil Production, Utilization, and Net-Trade



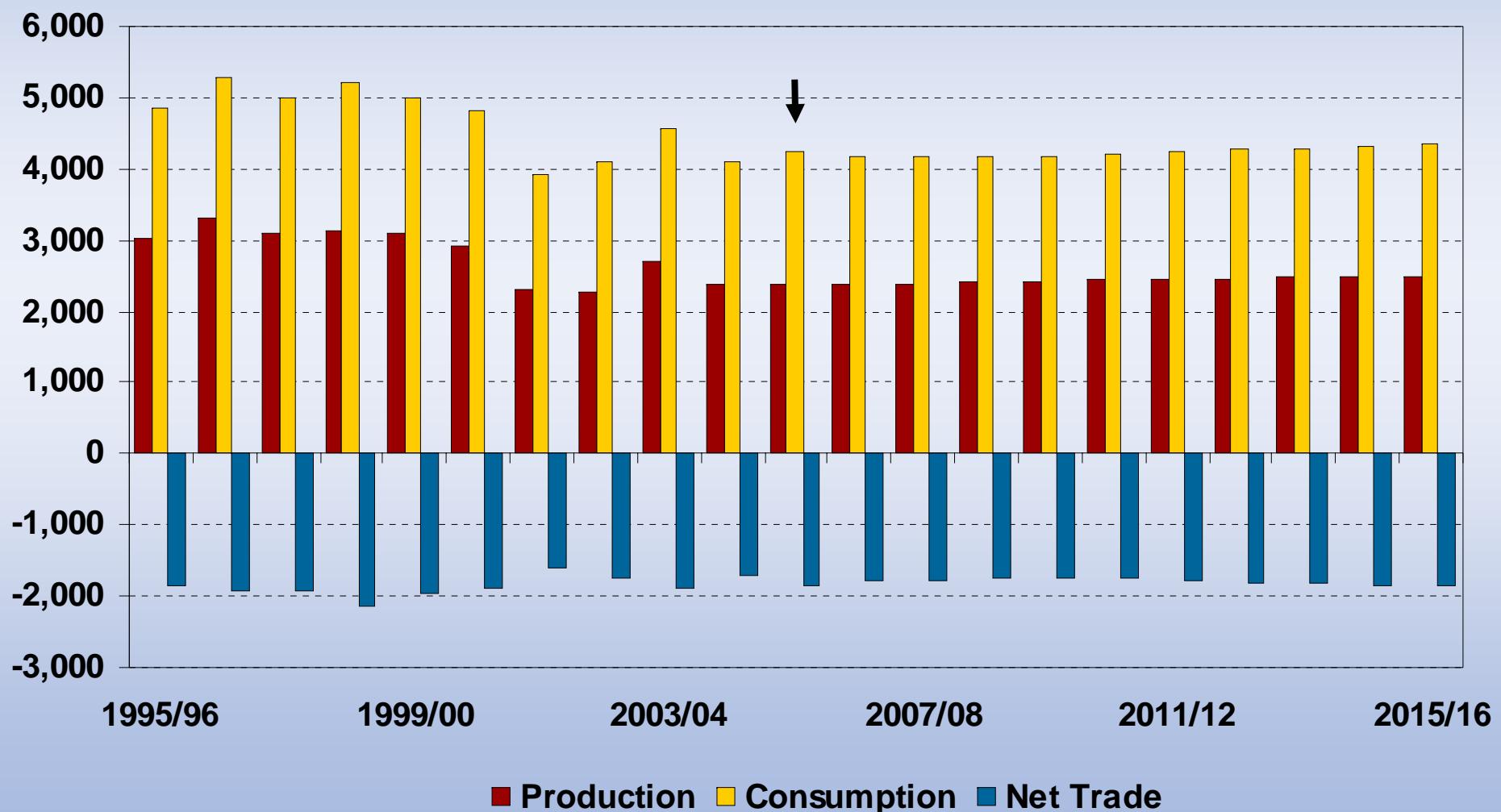
EU Rapeseed Meal Production, Utilization and Net-Trade

Thousand MT



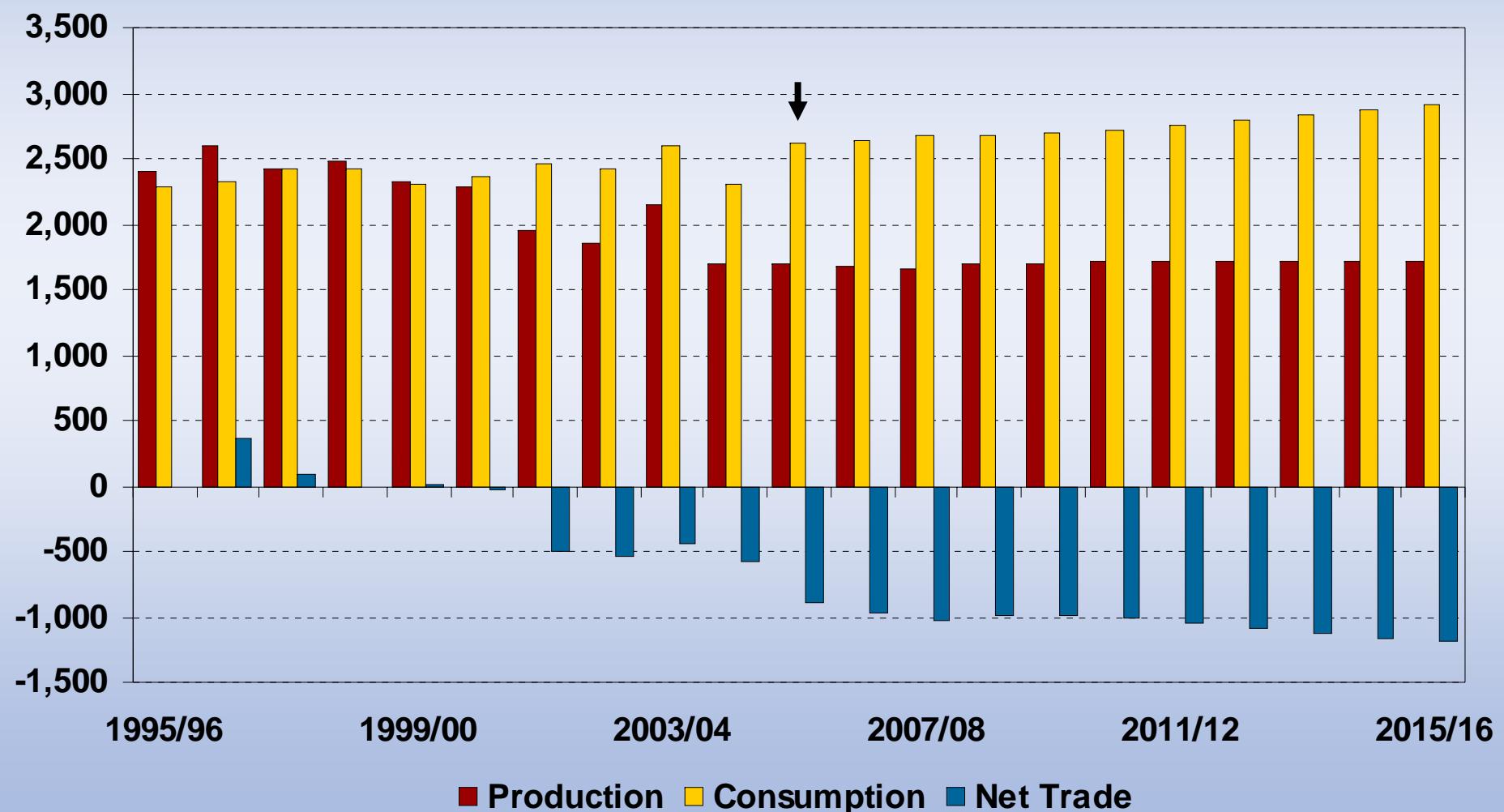
EU Sunflower Meal Production, Consumption and Net Trade

Thousand MT



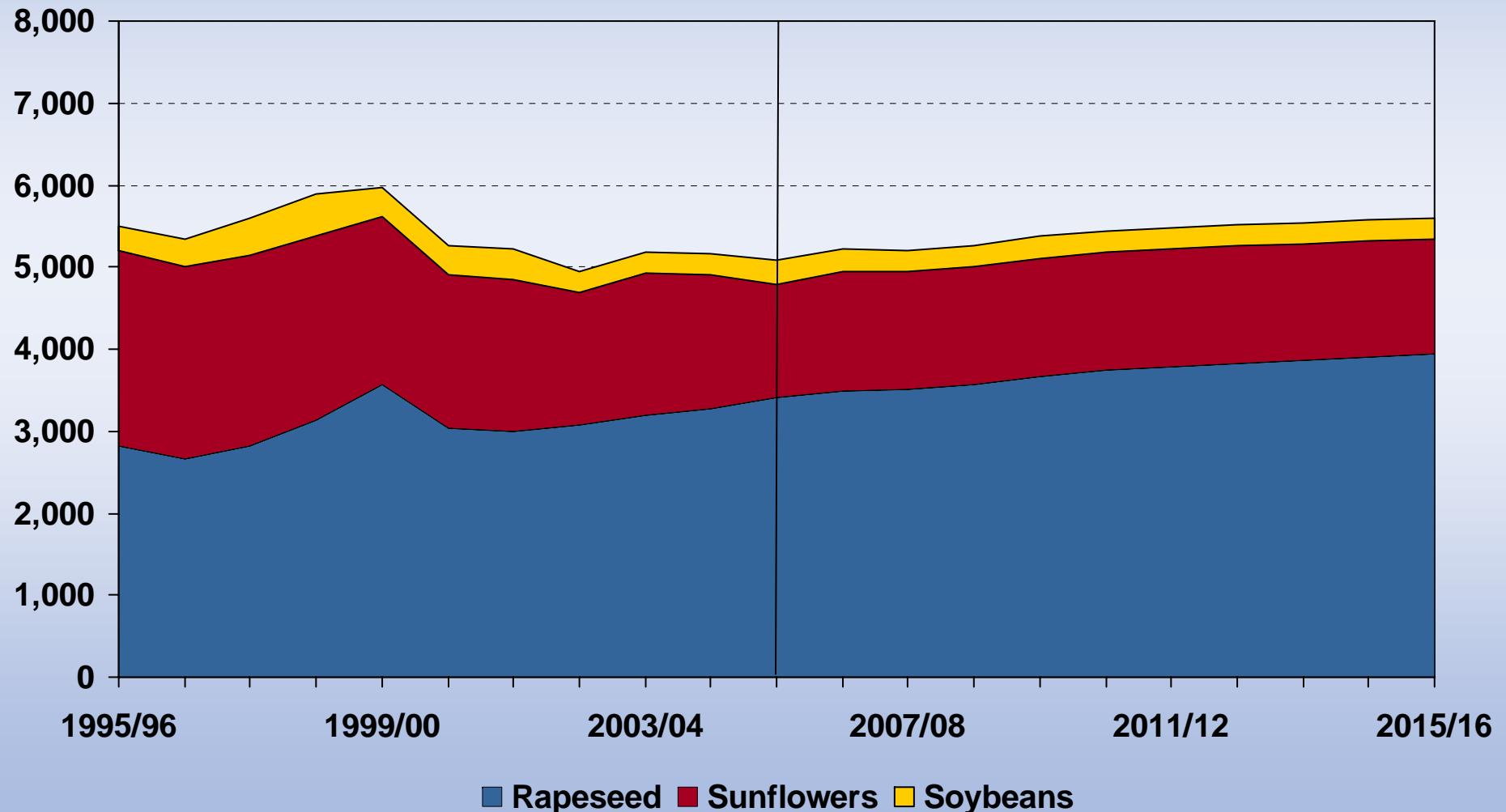
EU Sunflower Oil Production, Consumption and Net Trade

Thousand MT



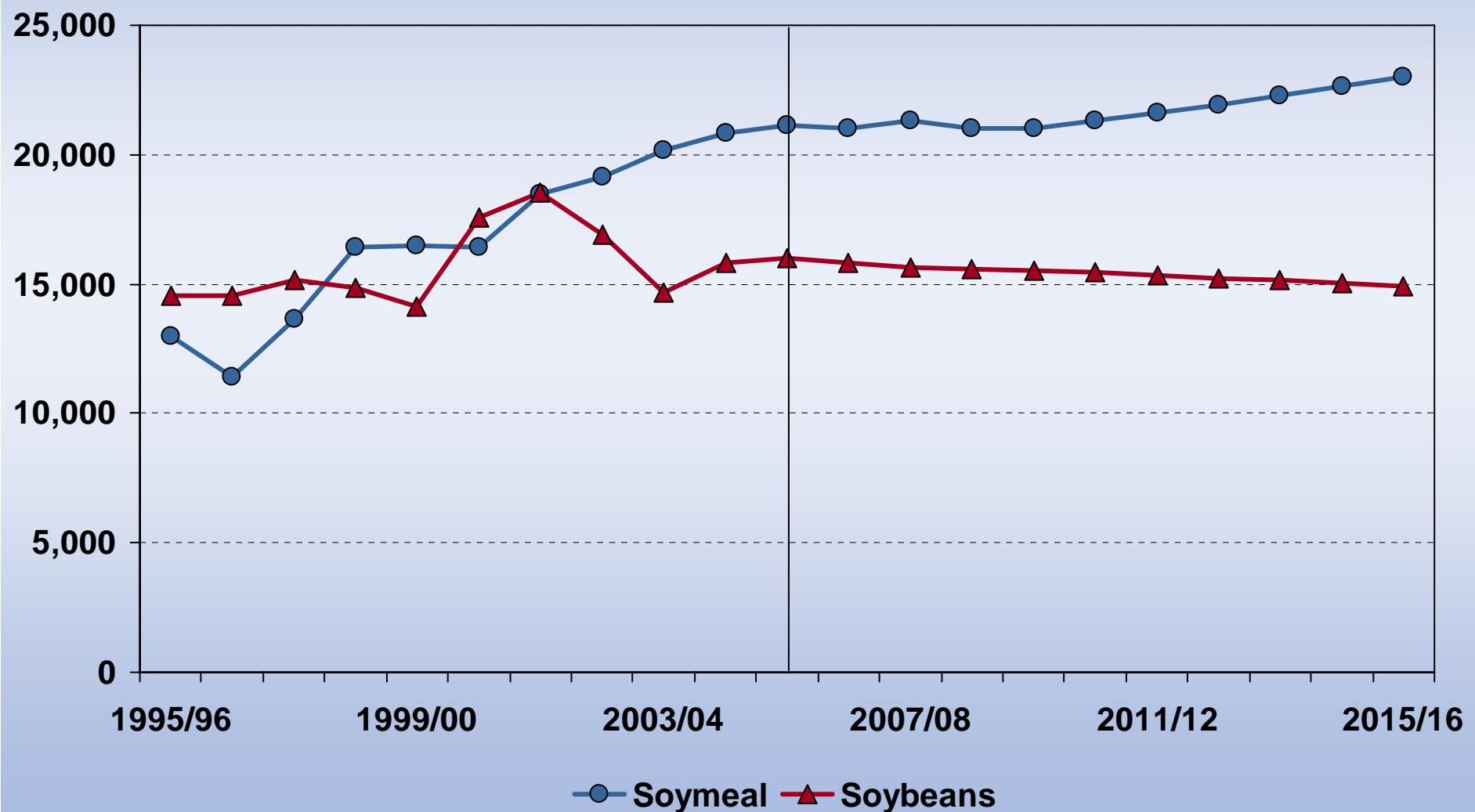
EU-15 Oilseed Area Harvested

Thousand
Hectares



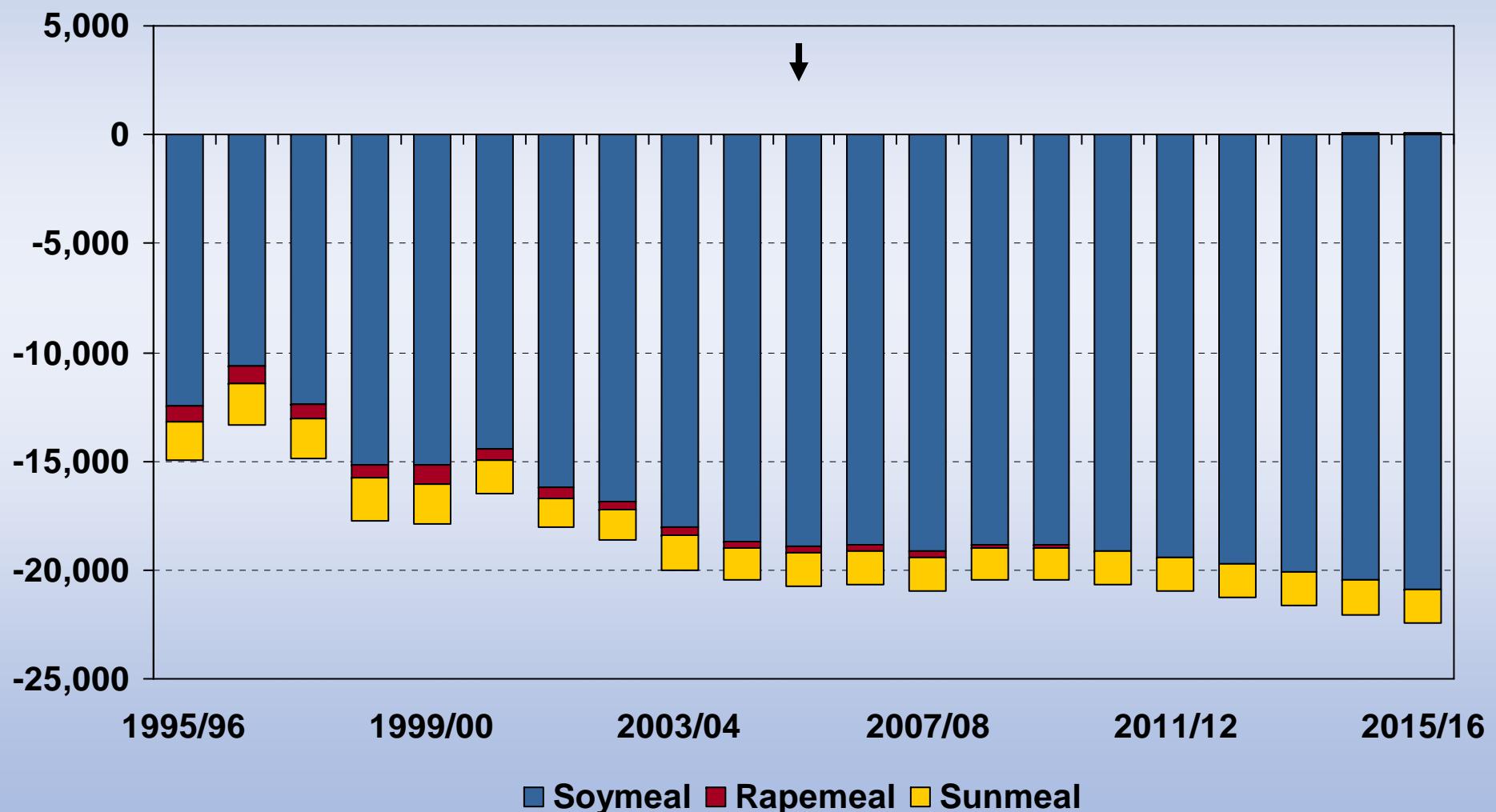
EU-15 Soybean and Meal Imports

Thousand MT



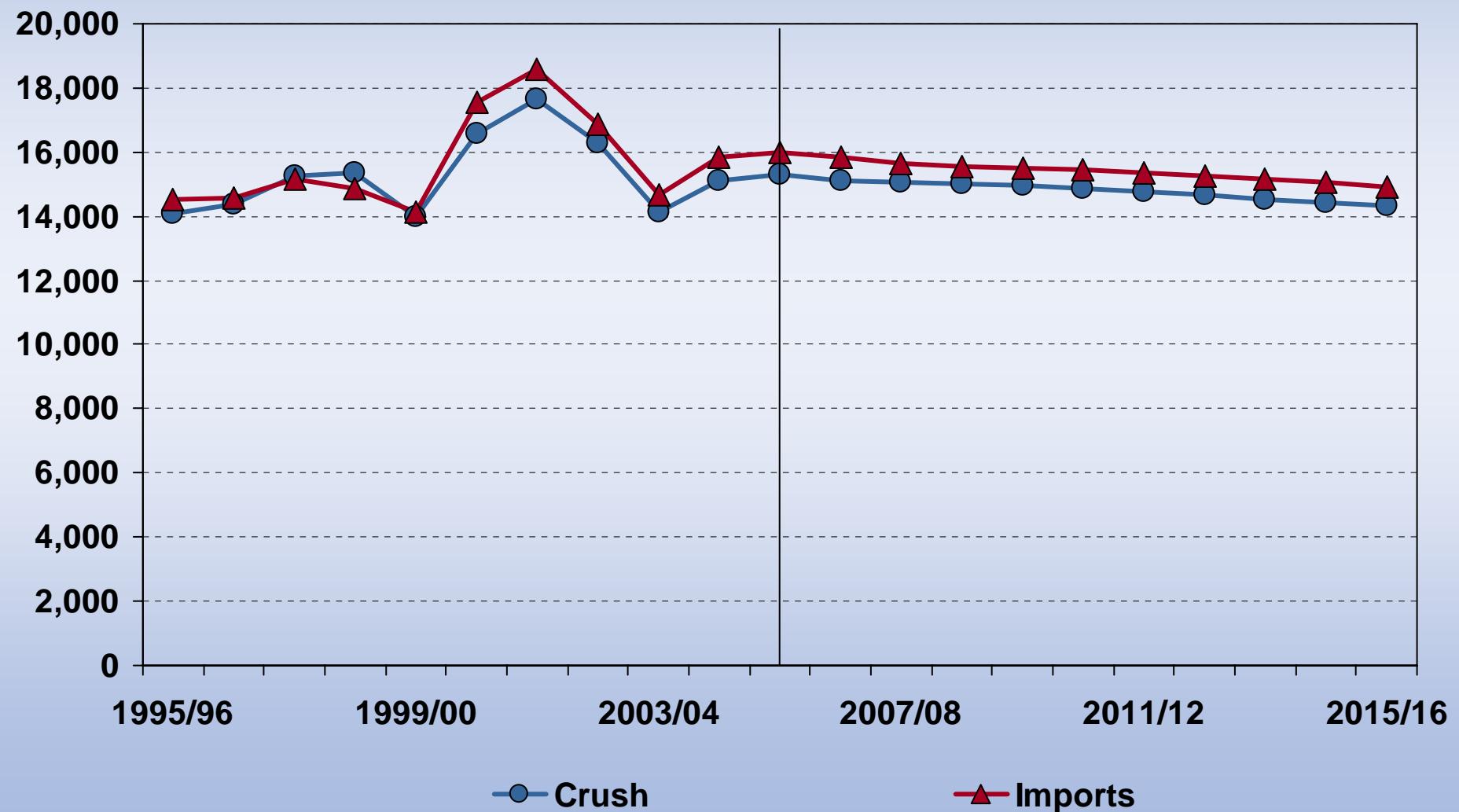
EU-15 Oilseed Meal Trade

Thousand MT



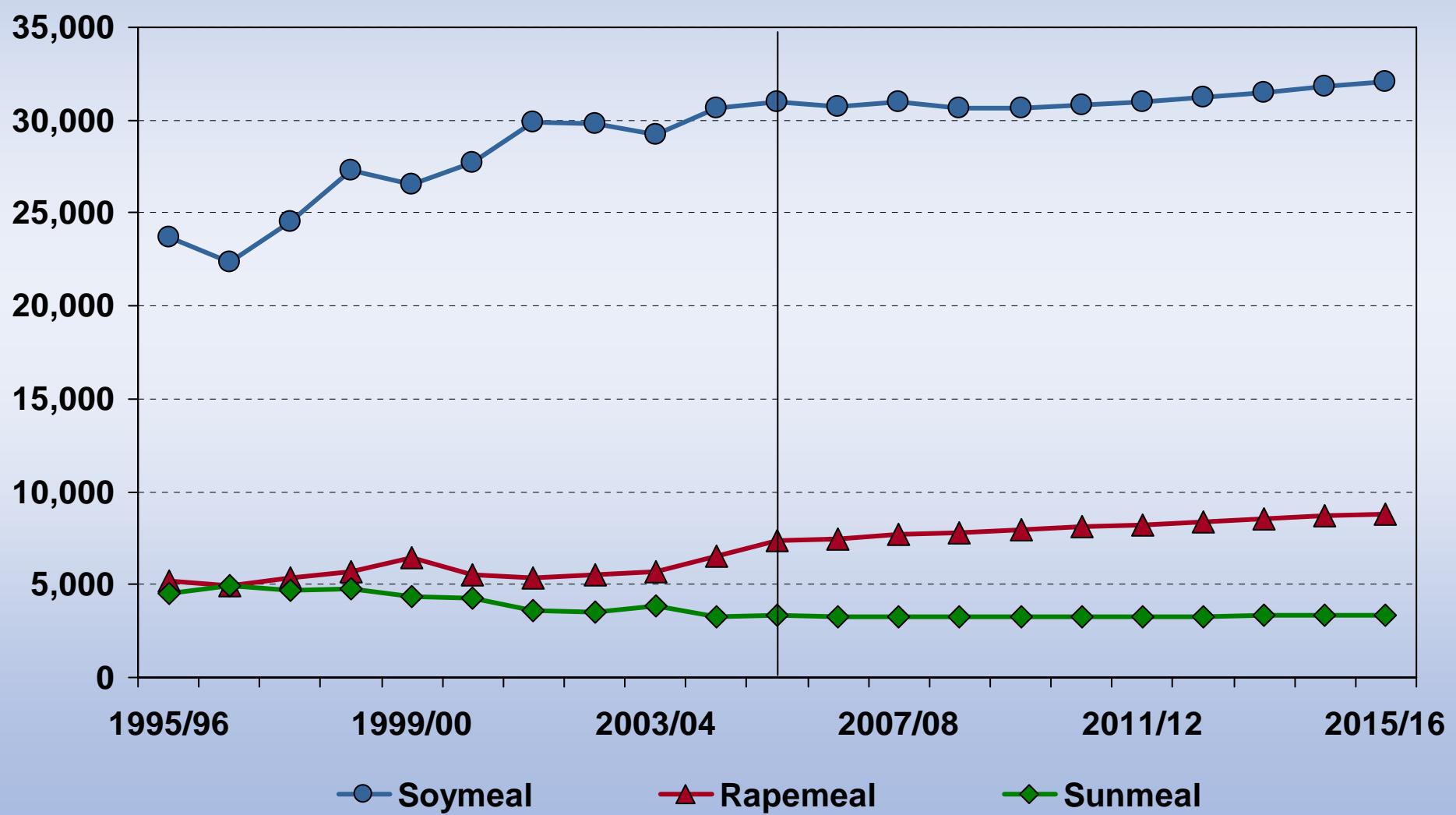
EU-15 Soybean Crush and Imports

Thousand MT

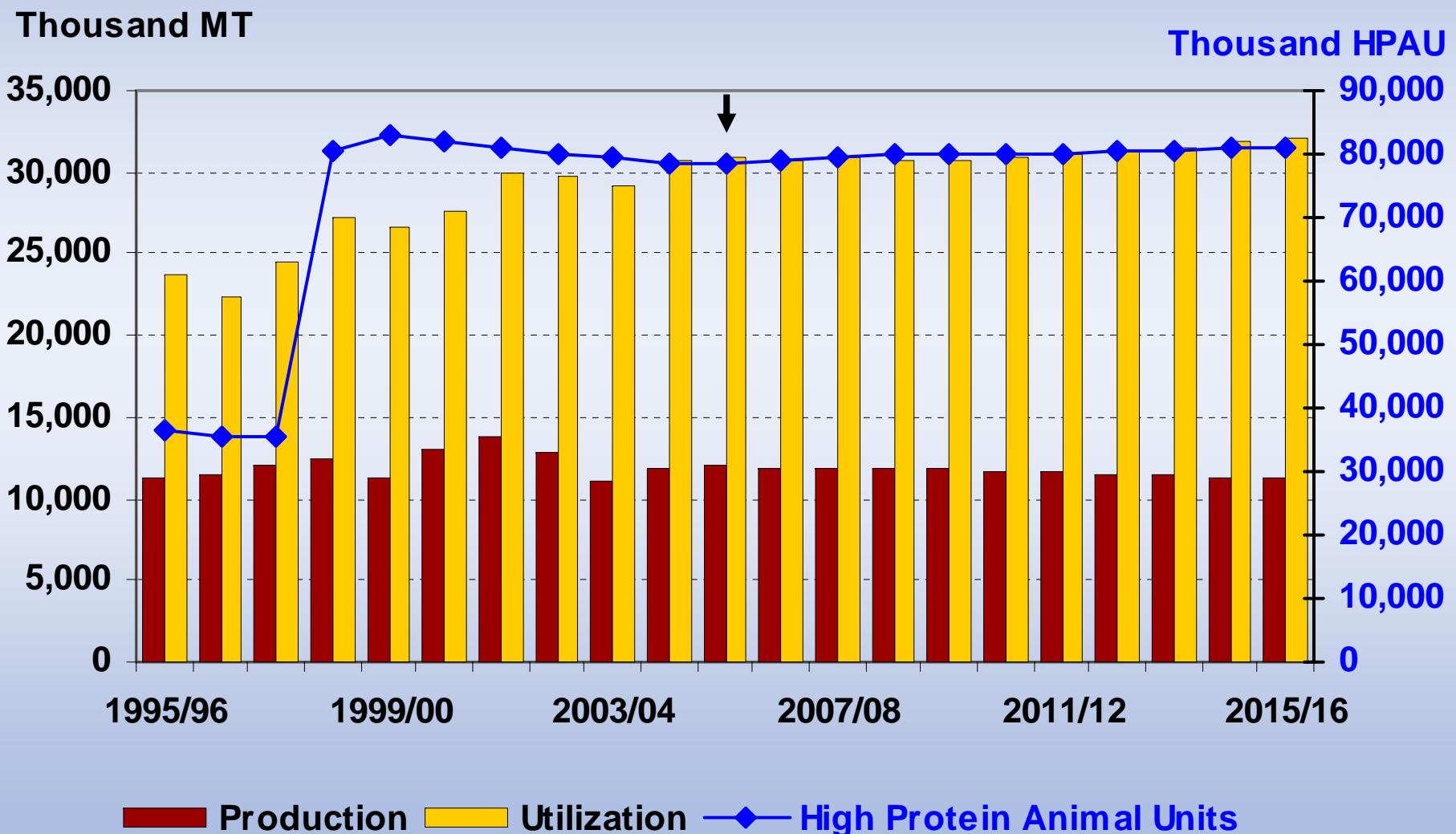


EU-15 Protein Meal Utilization

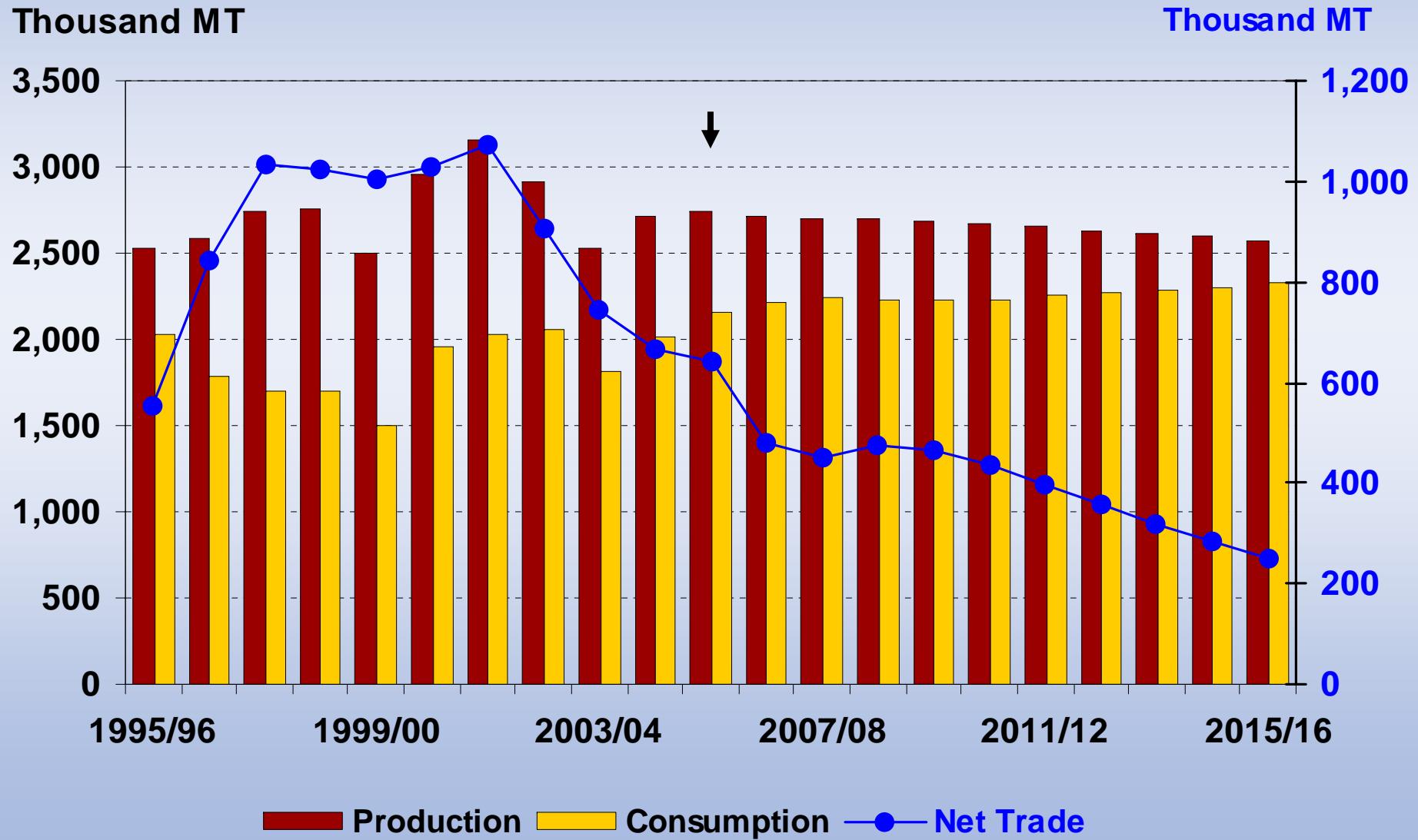
Thousand MT



EU-15 Soybean Meal Utilization and HPAU

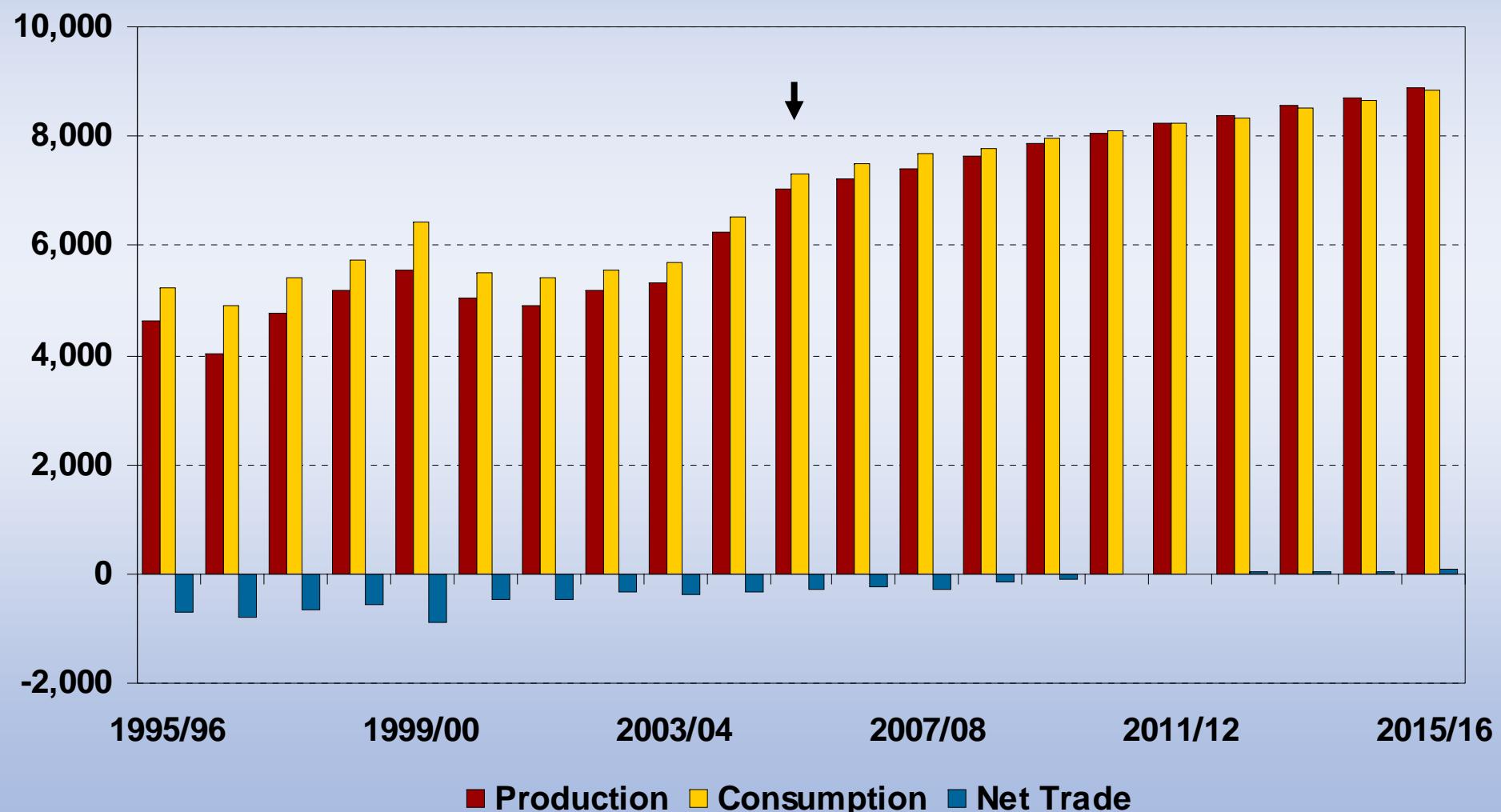


EU-15 Soybean Oil Production, Consumption, and Net Trade



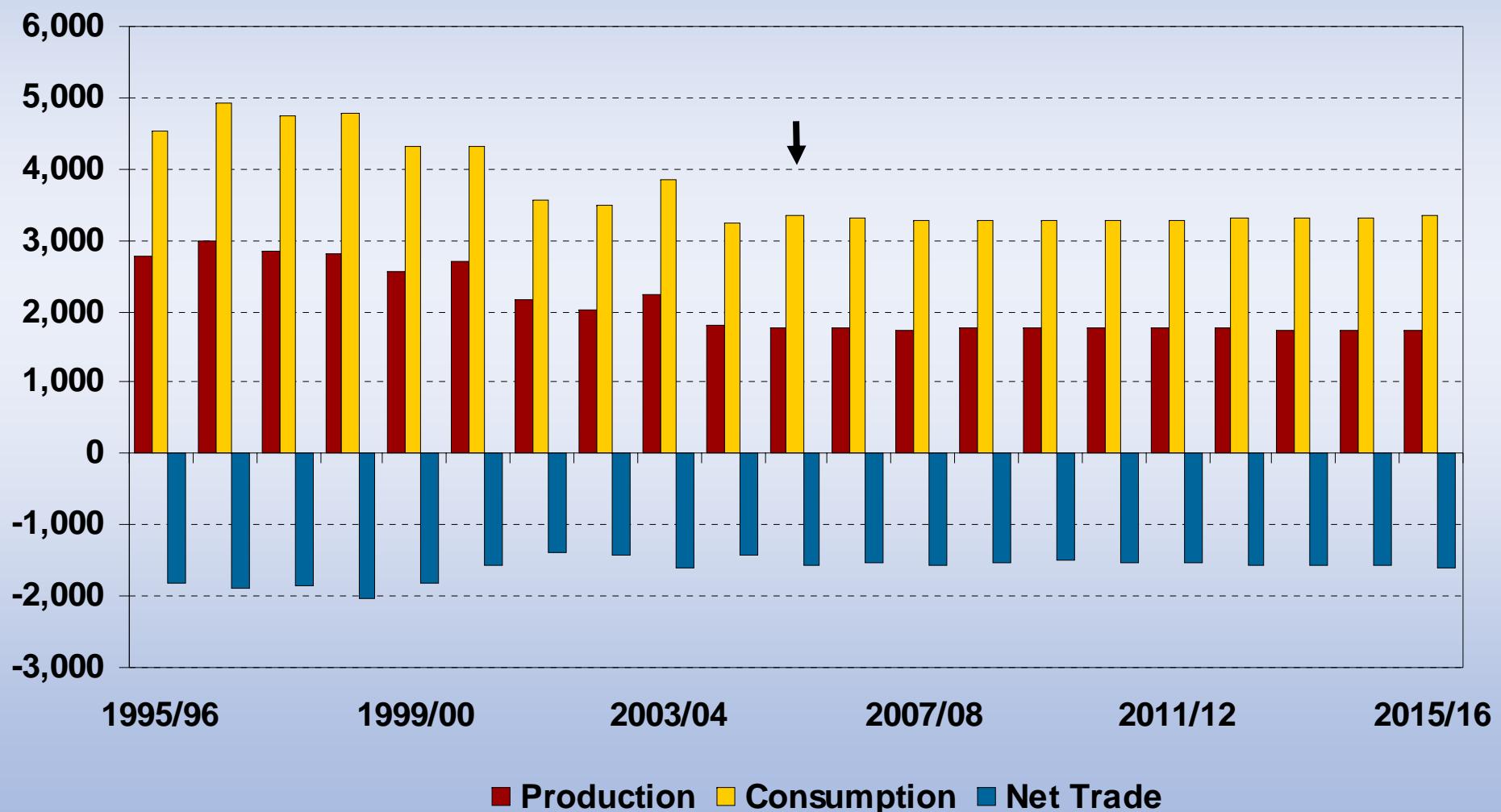
EU-15 Rapeseed Meal Production, Consumption and Net Trade

Thousand MT



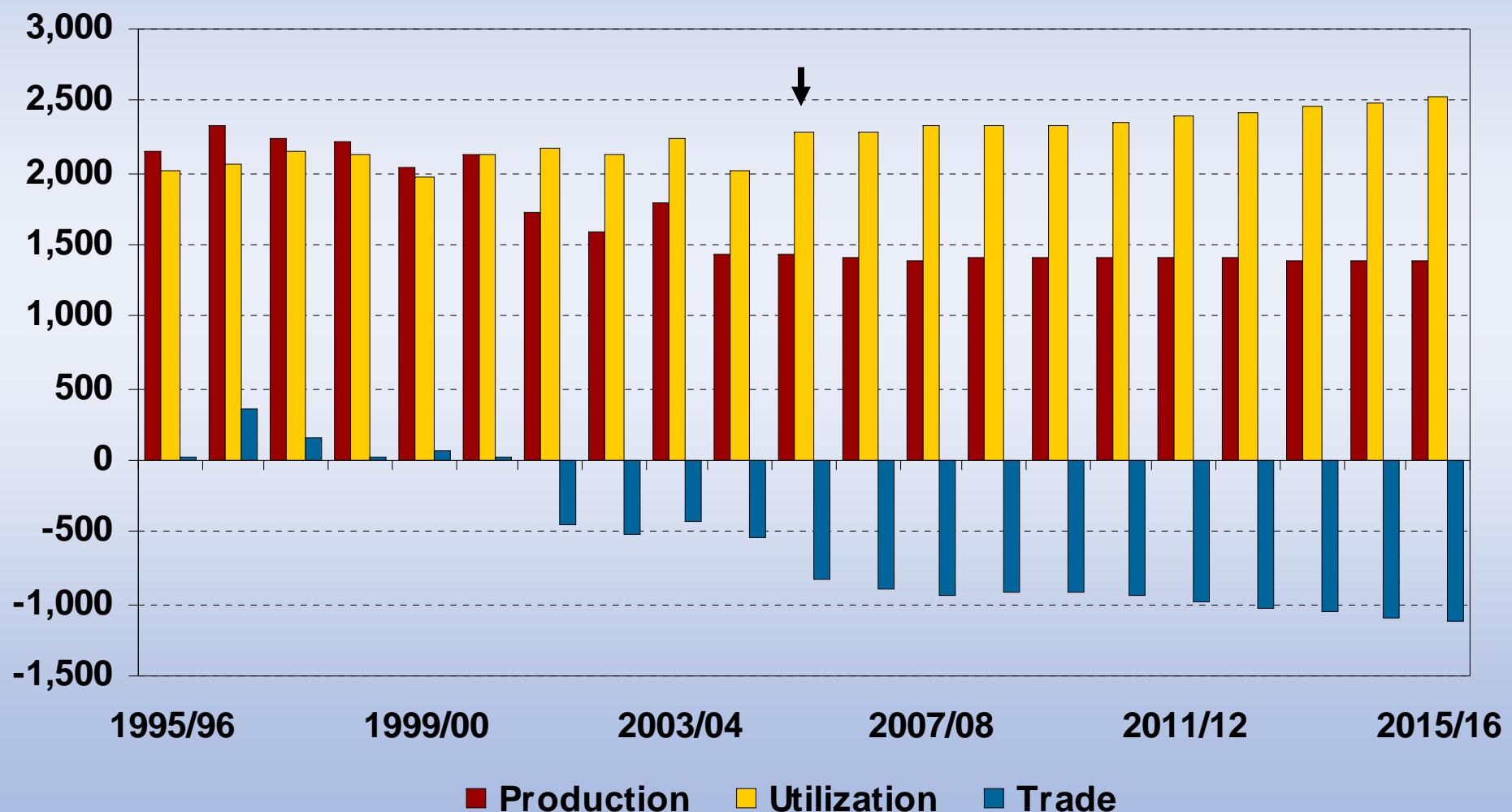
EU-15 Sunflower Meal Production, Consumption and Net Trade

Thousand MT



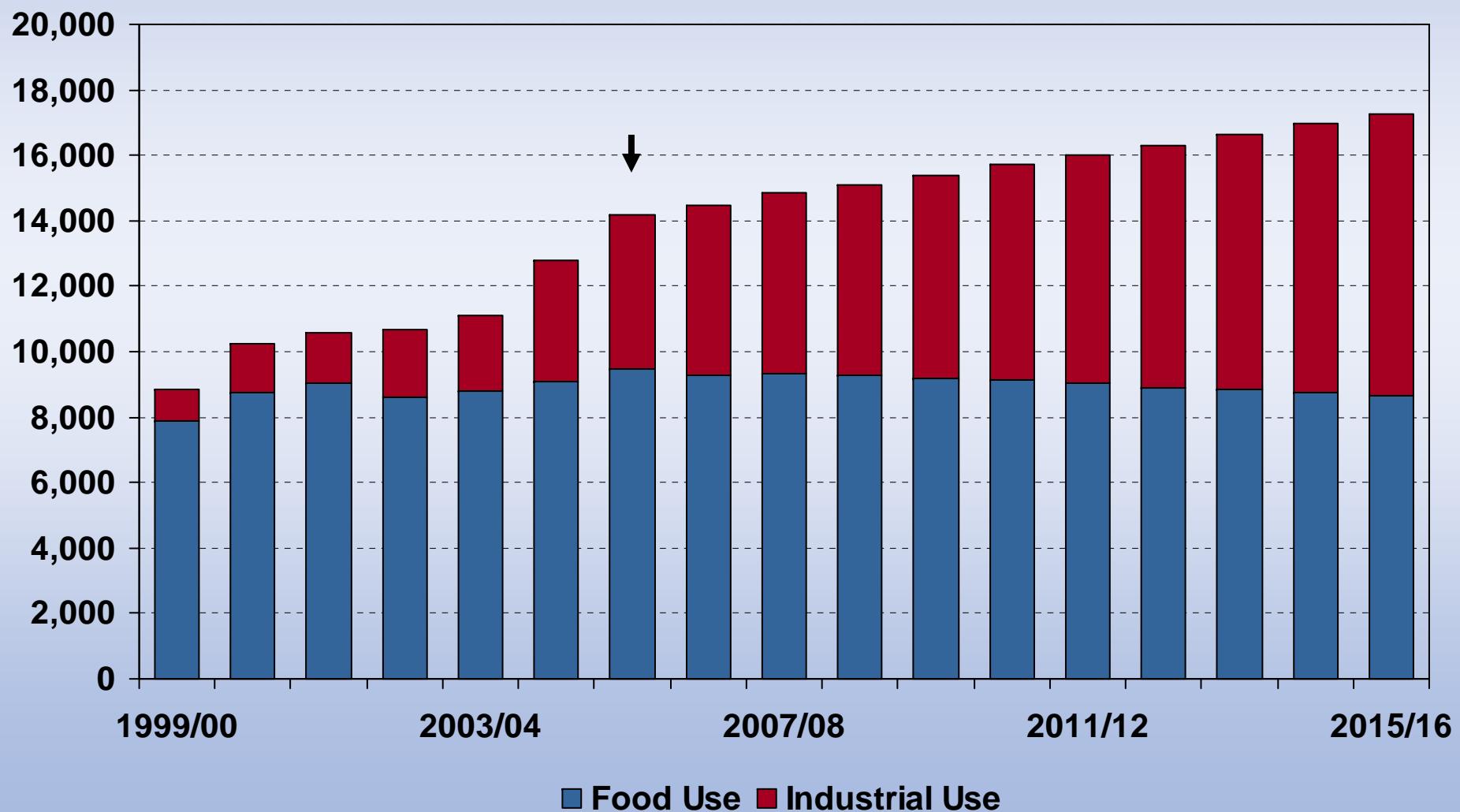
EU-15 Sunflower Oil Production, Utilization and Net-Trade

Thousand MT



EU-15 Vegetable Oil Consumption

Thousand MT

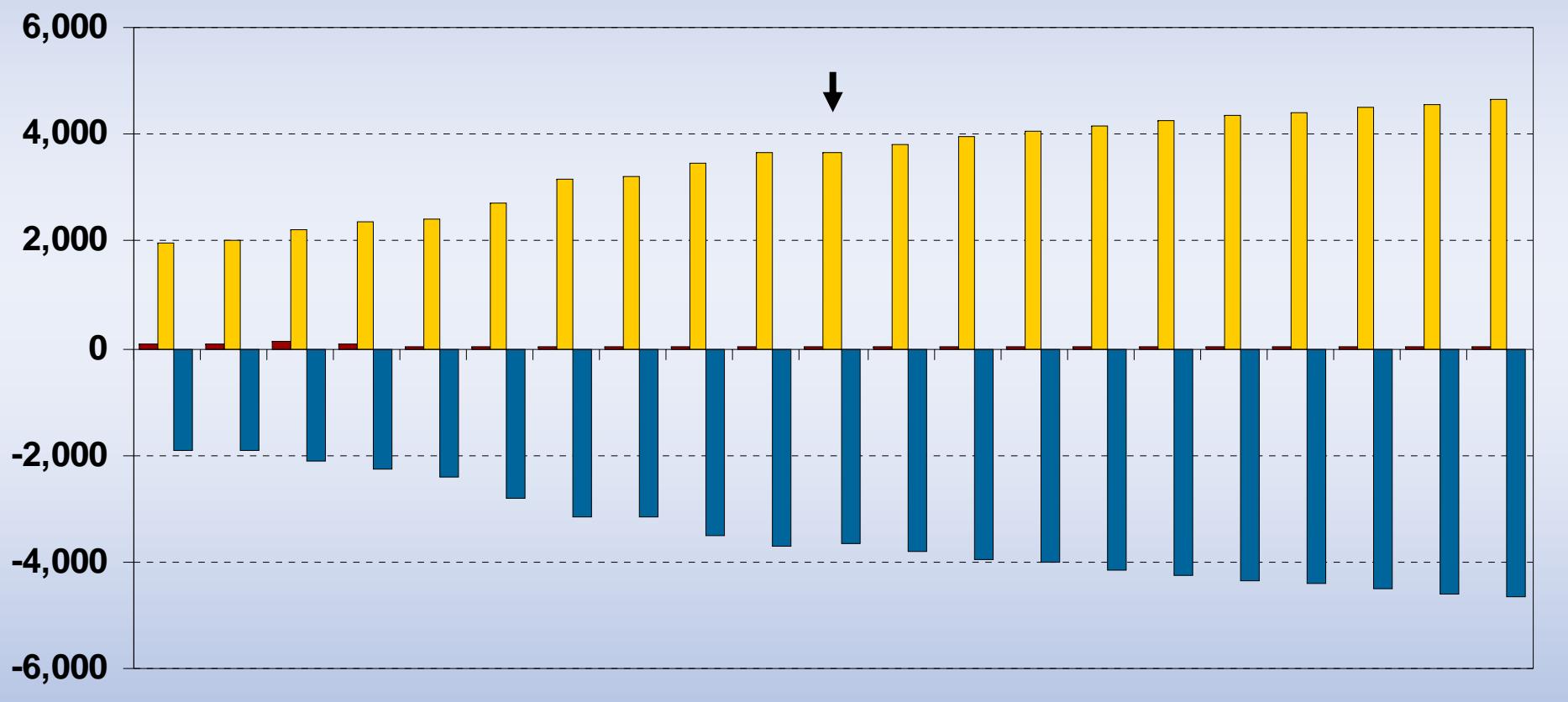


EU New Member States

- Oilseed area
 - Rapeseed, sunflowers, soybeans
- Development of domestic crushing industries
- Feed and industrial utilization of protein meals
- Food consumption and industrial uses of vegetable oils

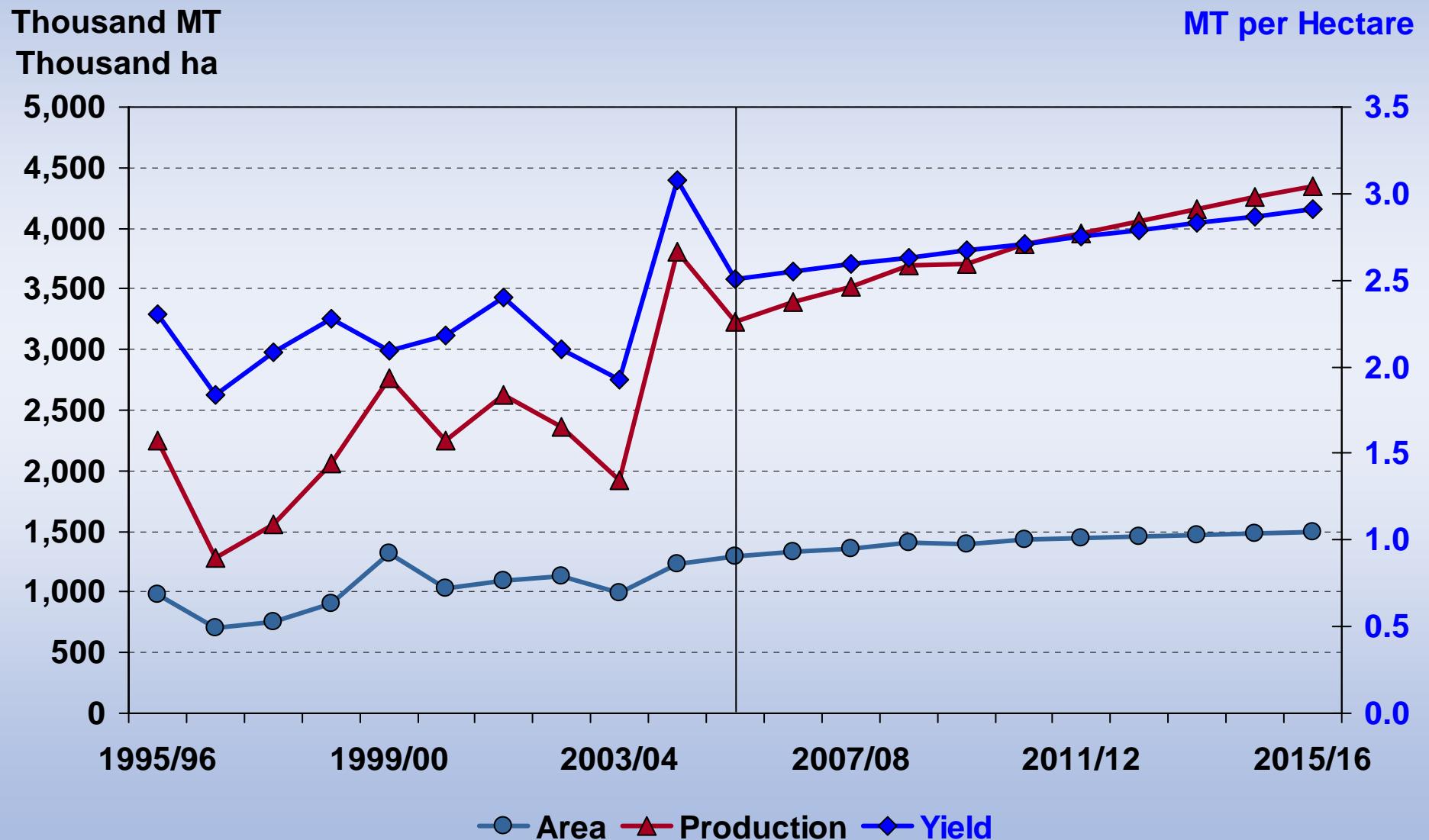
EU New Member States Soybean Meal Production, Consumption, and Net Trade

Thousand MT



■ Production ■ Consumption ■ Net Trade

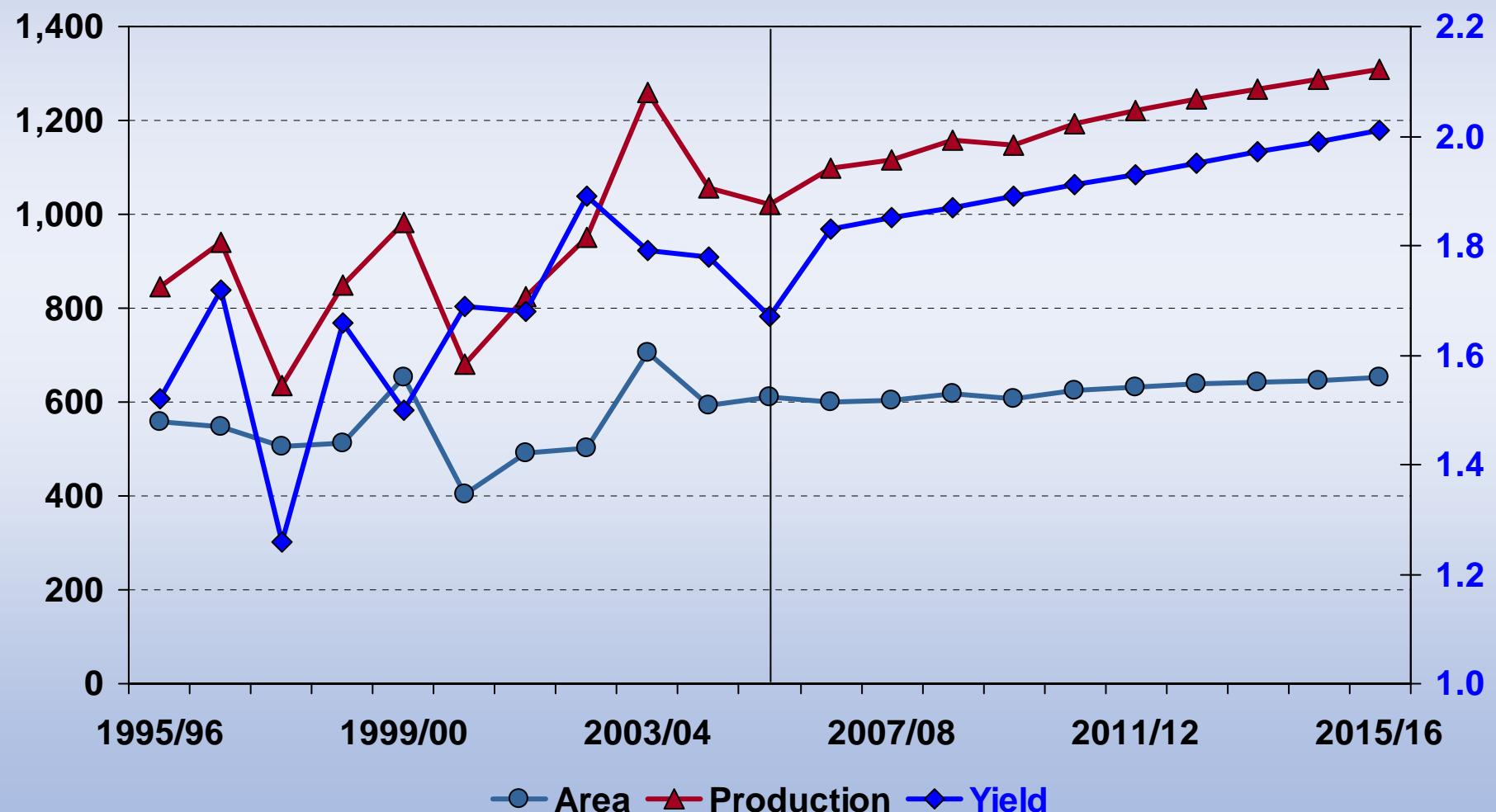
EU New Member States Rapeseed Area, Yield, and Production



EU New Member States Sunflower Area, Yield, and Production

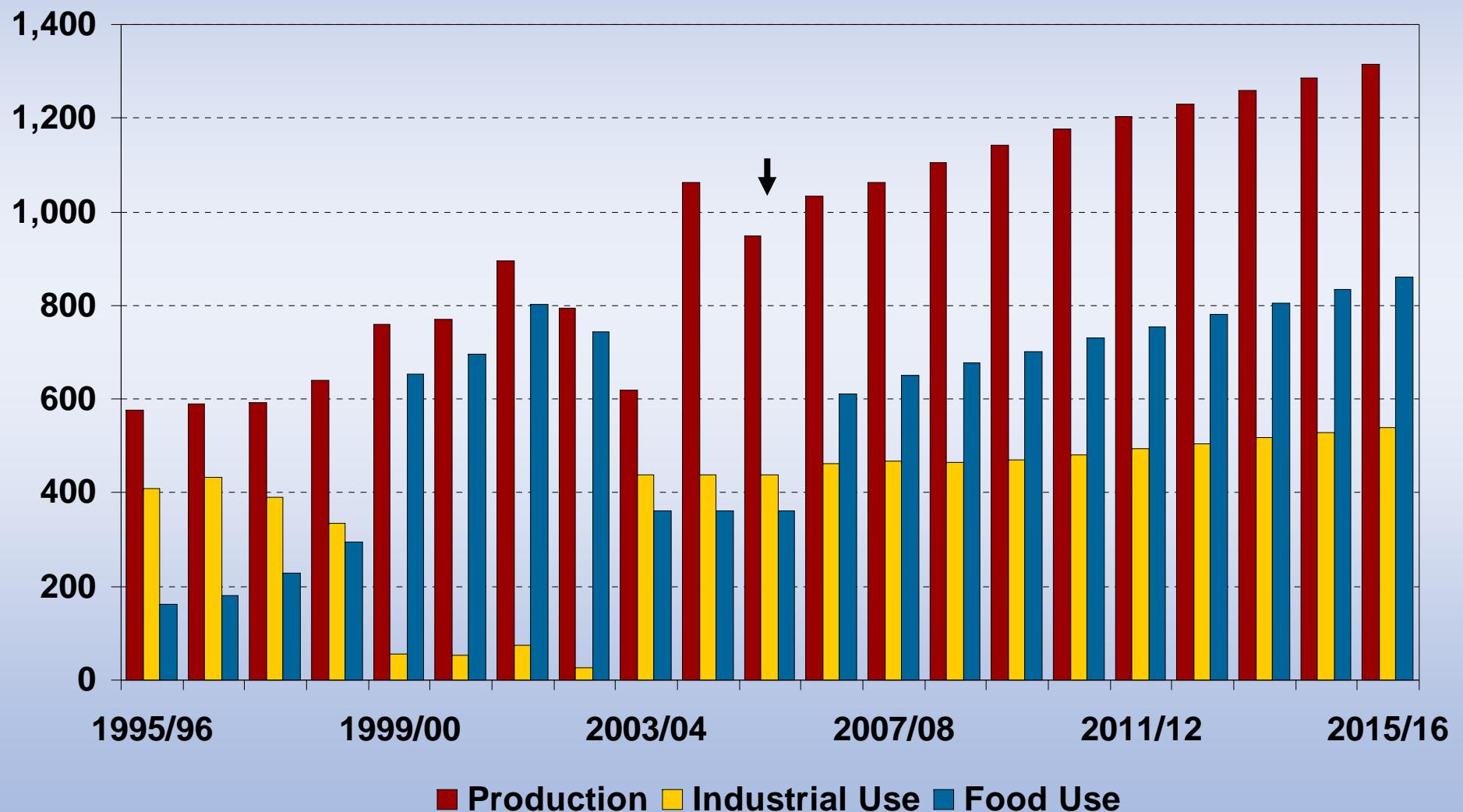
Thousand MT
Thousand ha

MT per Hectare

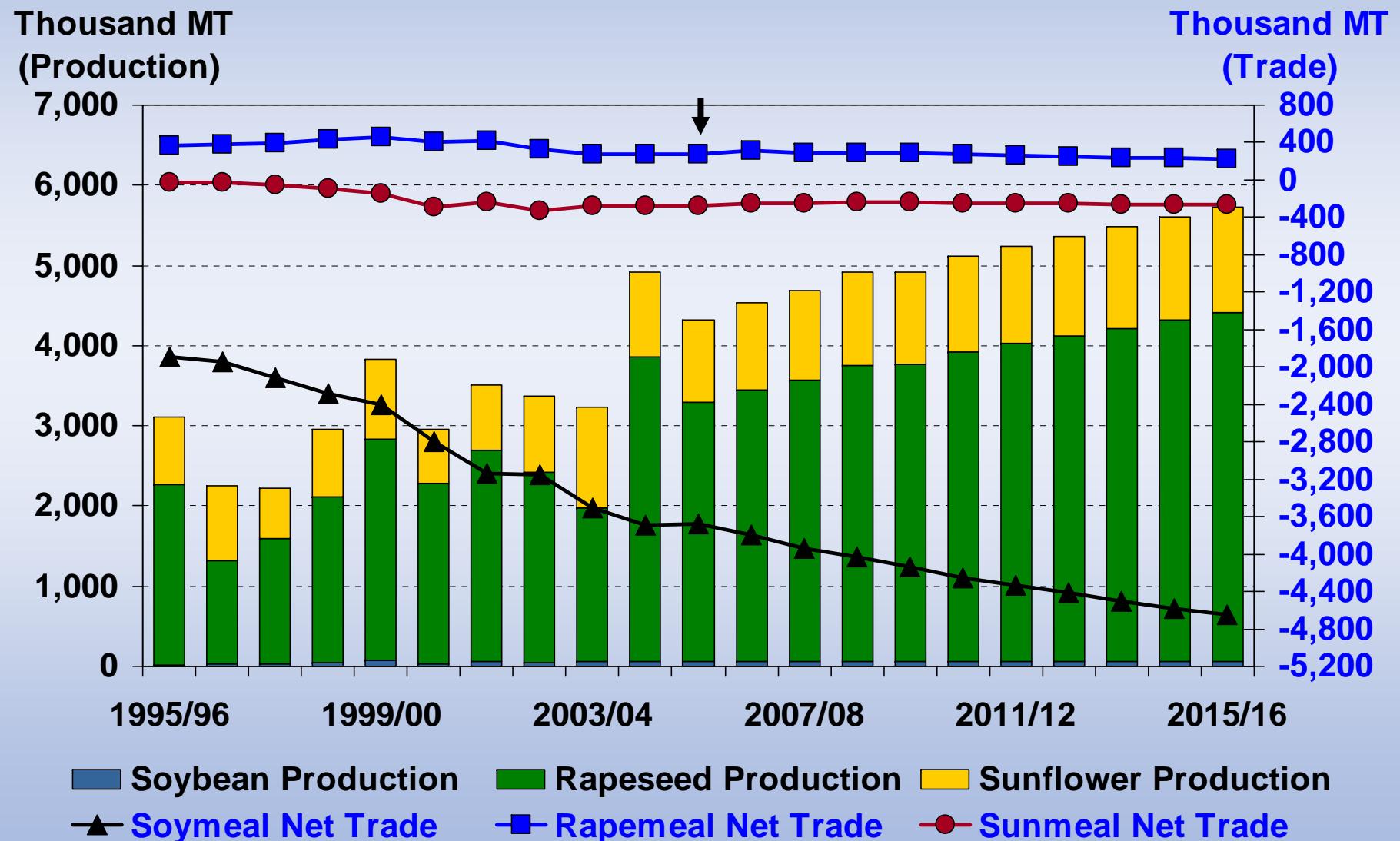


EU New Member States Rapeseed Oil Production and Use

Thousand MT

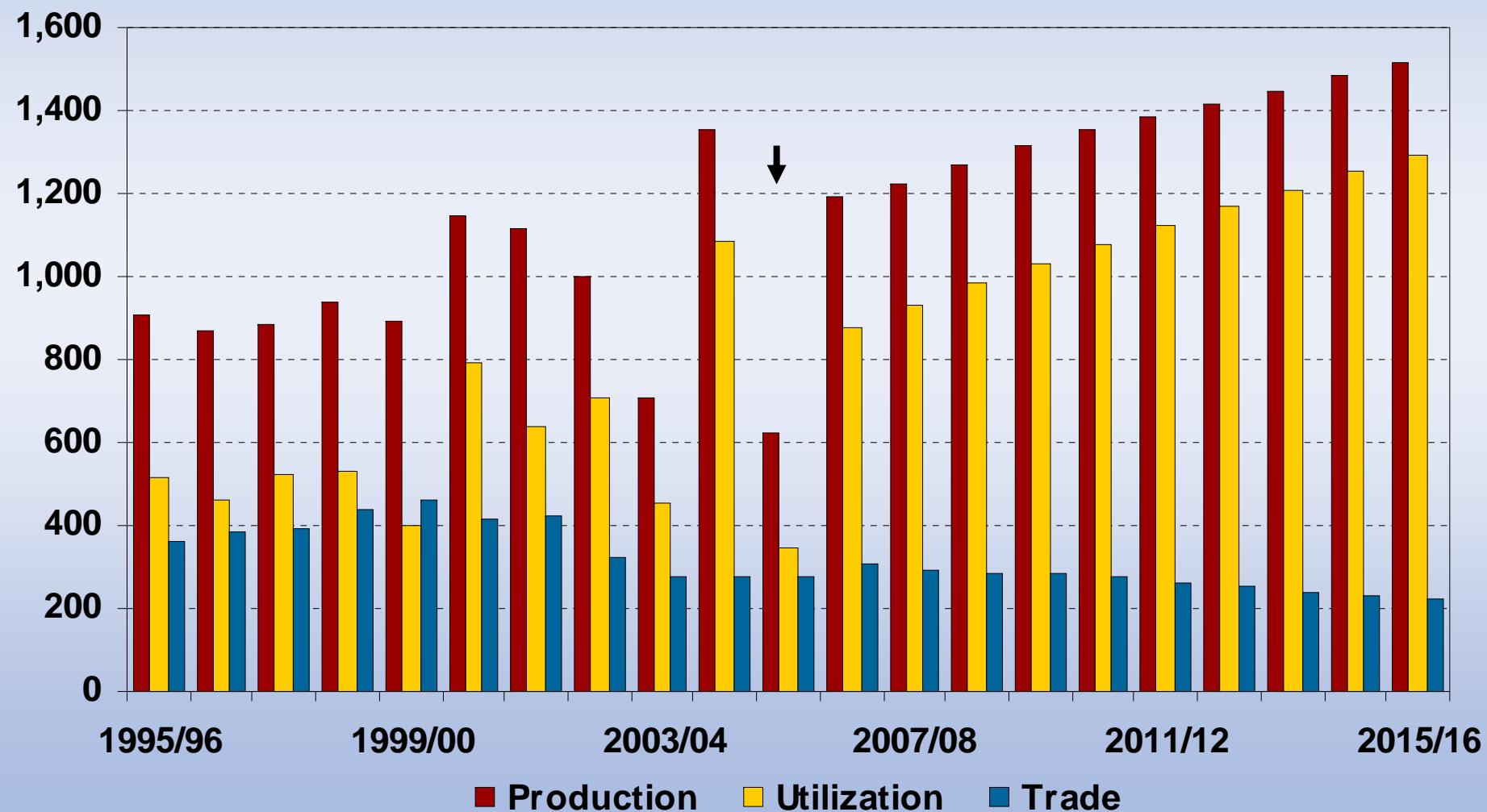


EU New Member States Oilseed Production and Protein Meal Net Trade



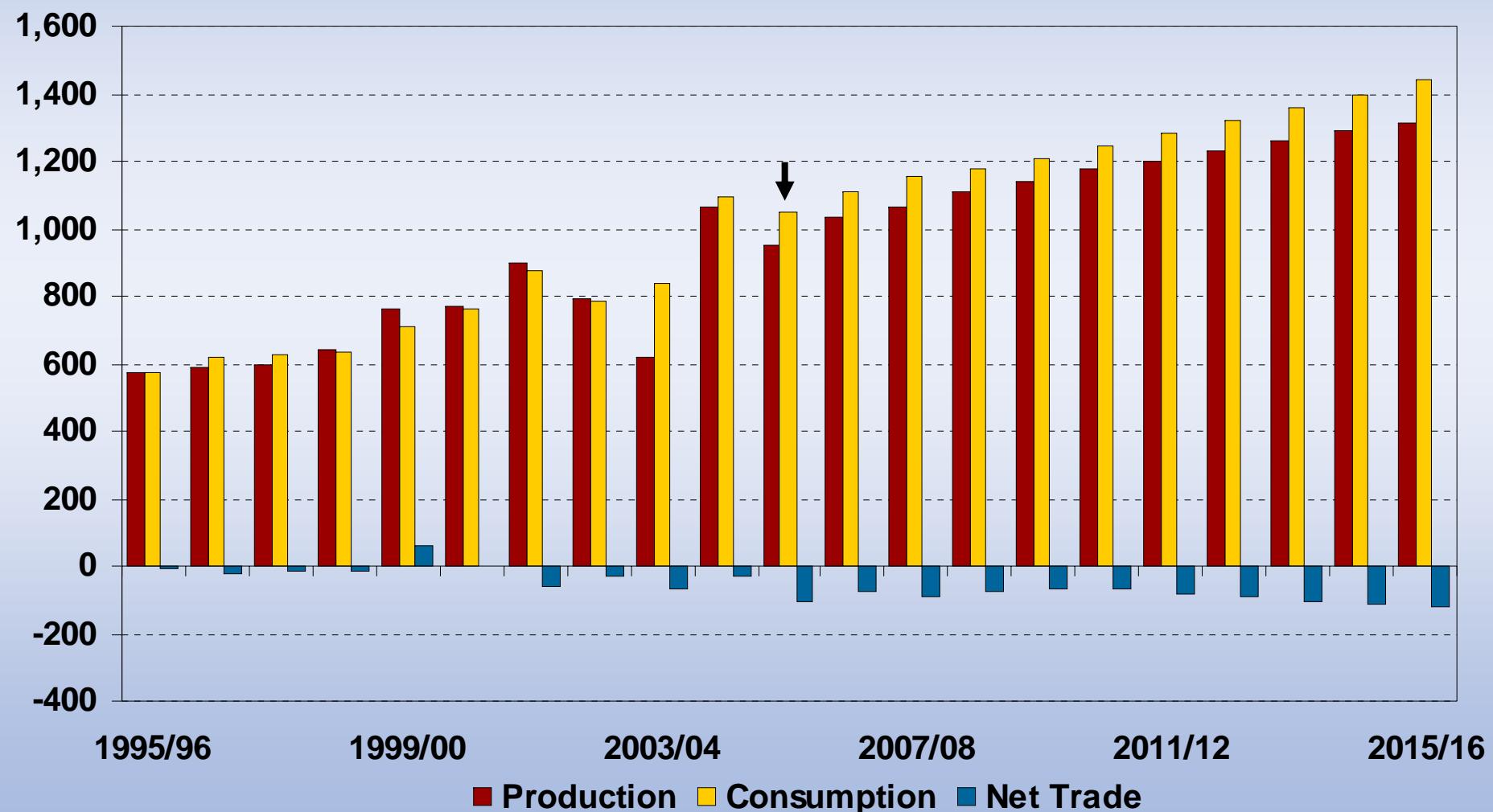
EU New Member States Rapeseed Meal Production, Consumption and Net Trade

Thousand MT



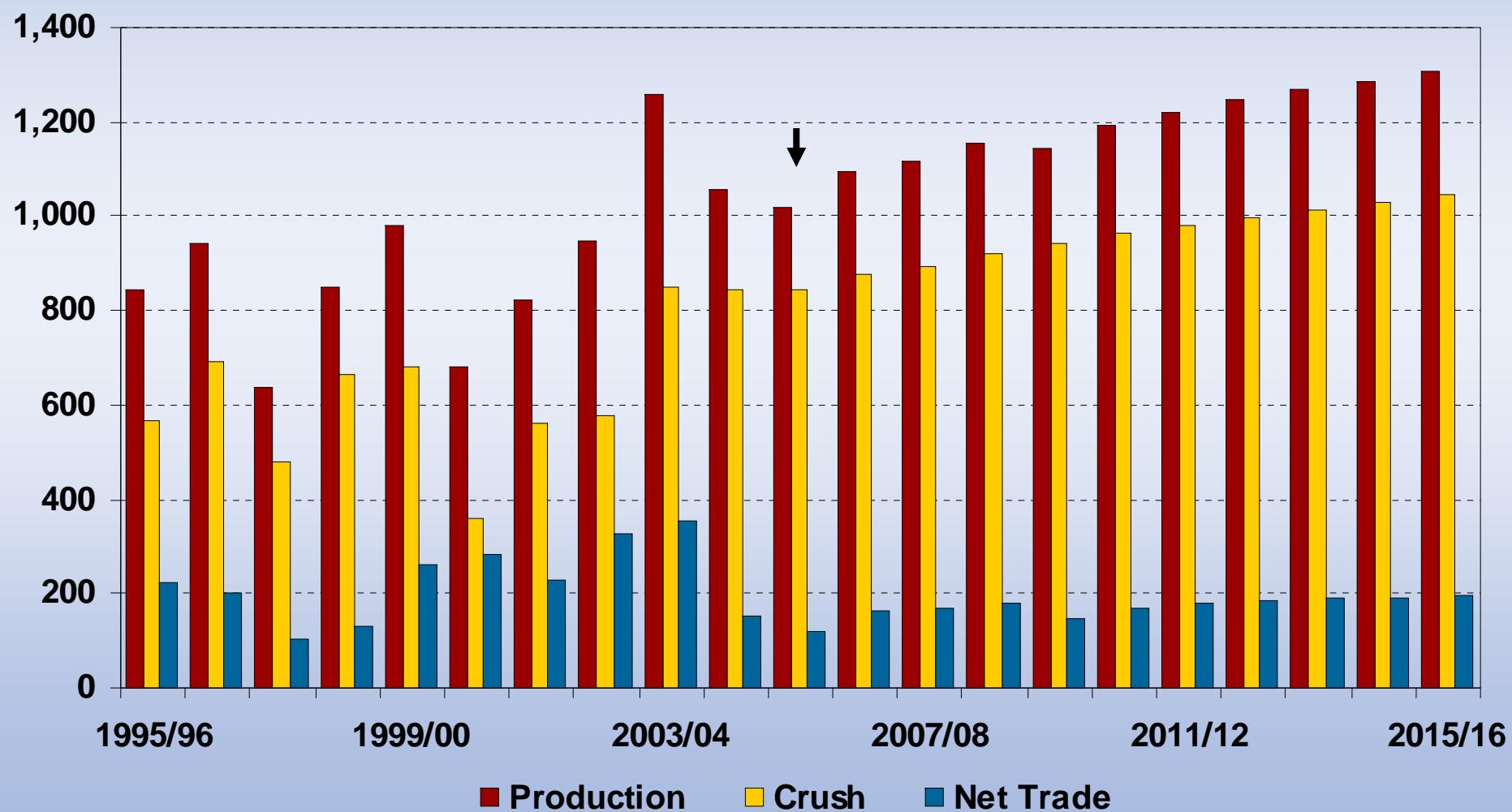
EU New Member States Rapeseed Oil Production, Consumption and Net Trade

Thousand MT



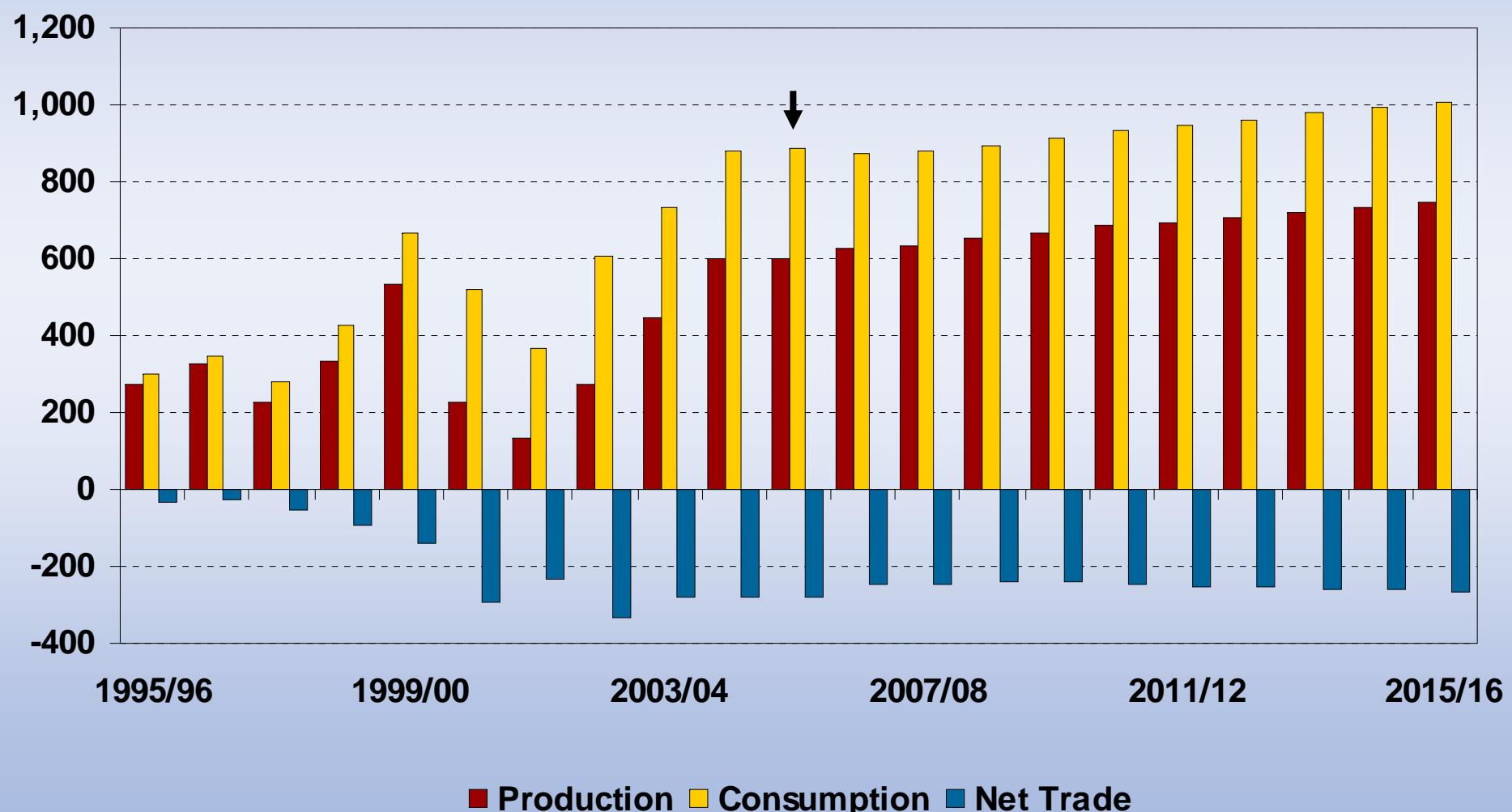
EU New Member States Sunflower Production, Crush and Net Trade

Thousand MT



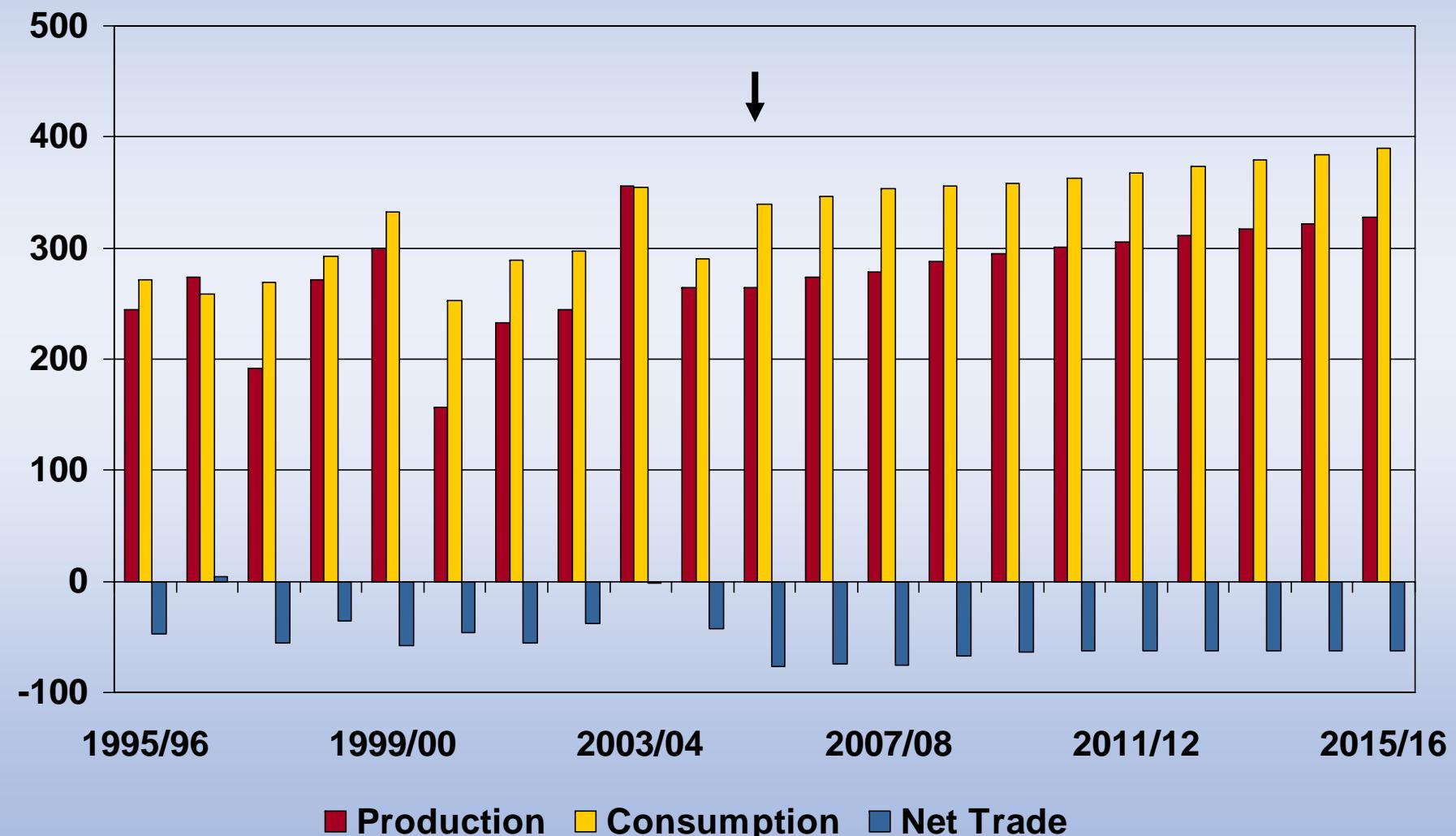
EU New Member States Sunflower Meal Production, Consumption and Net Trade

Thousand MT



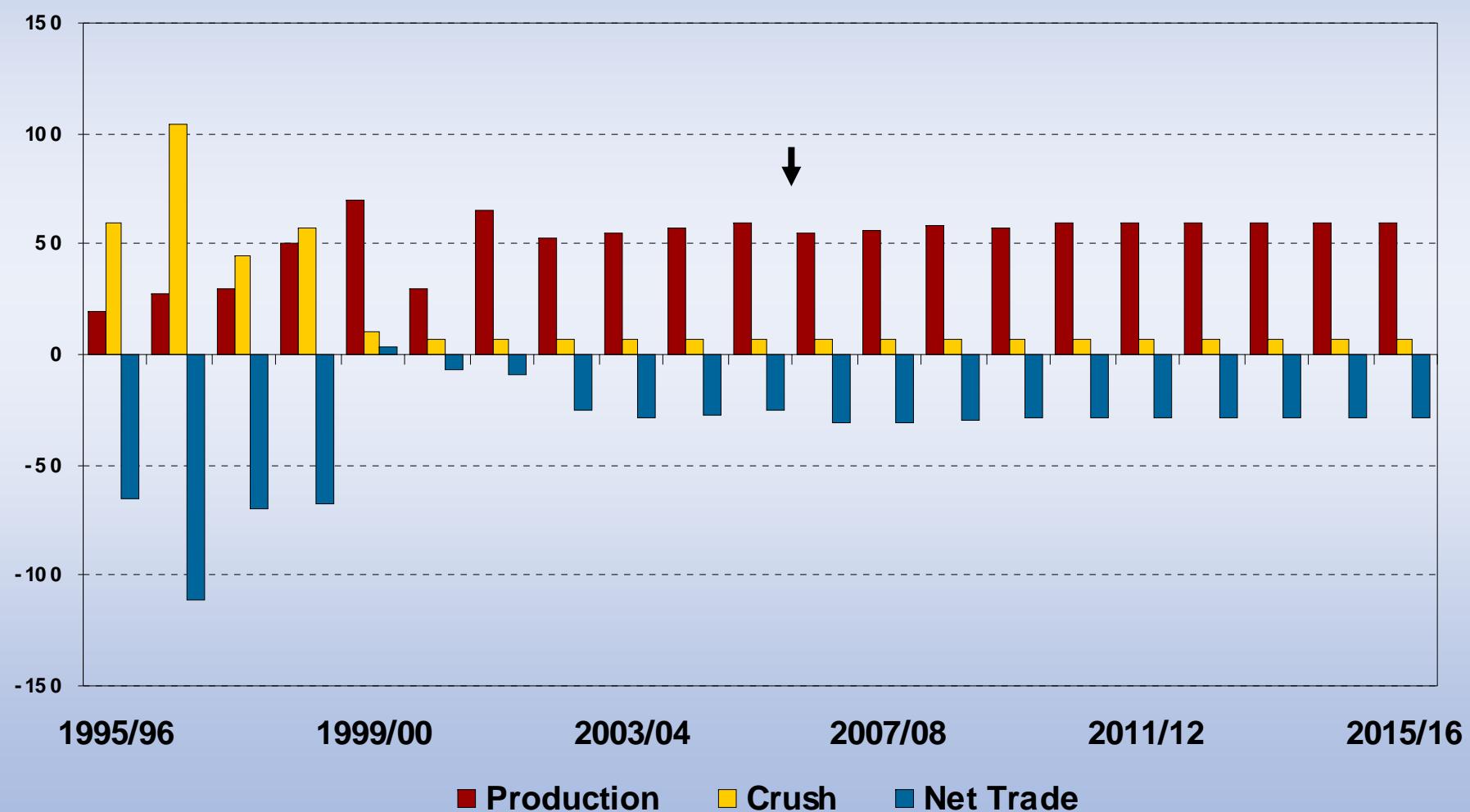
EU New Member States Sunflower Oil Production, Consumption and Net Trade

Thousand MT



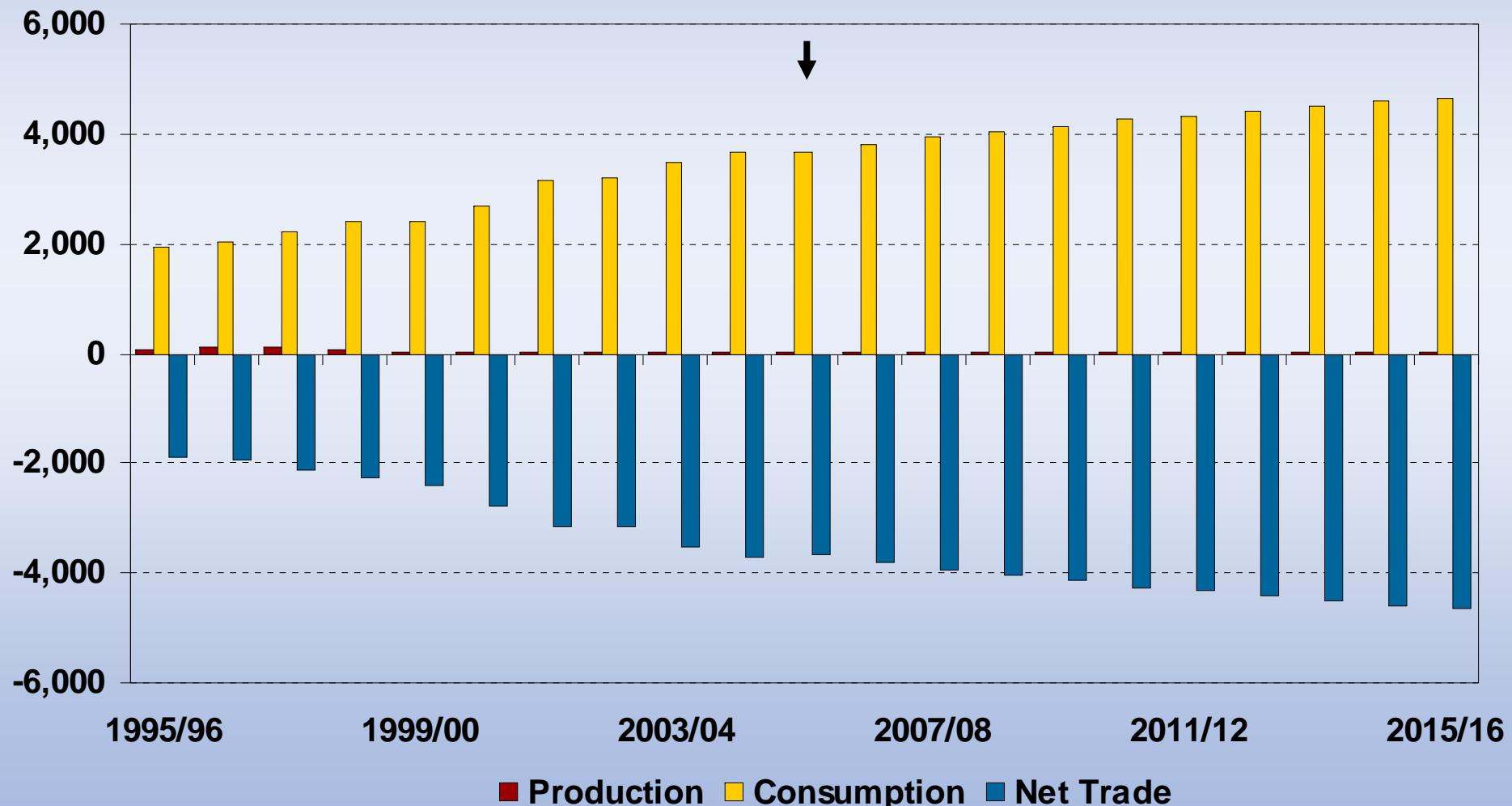
EU New Member States Soybean Production, Crush and Net Trade

Thousand MT



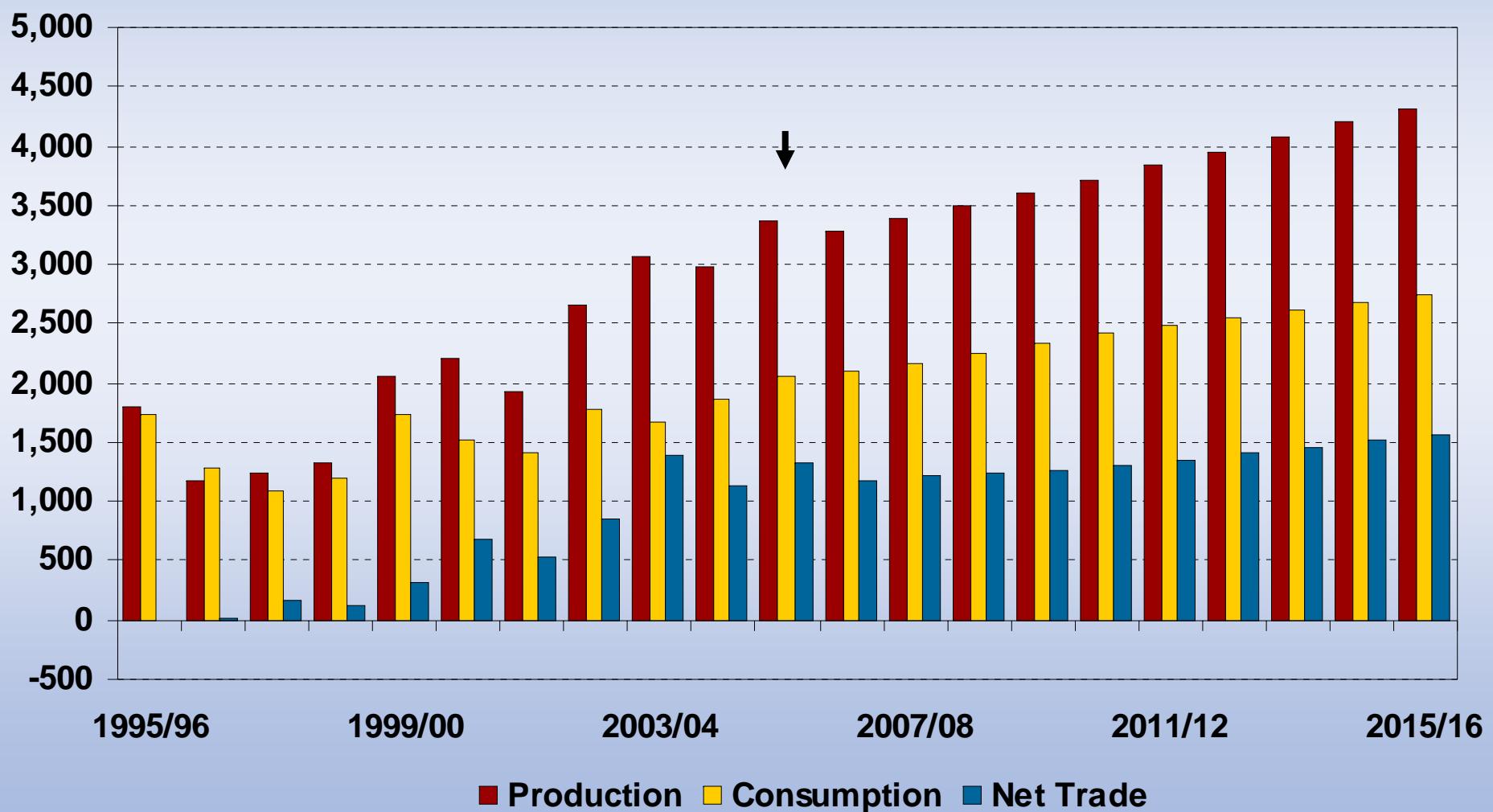
EU New Member States Soybean Meal Production, Consumption and Net Trade

Thousand MT



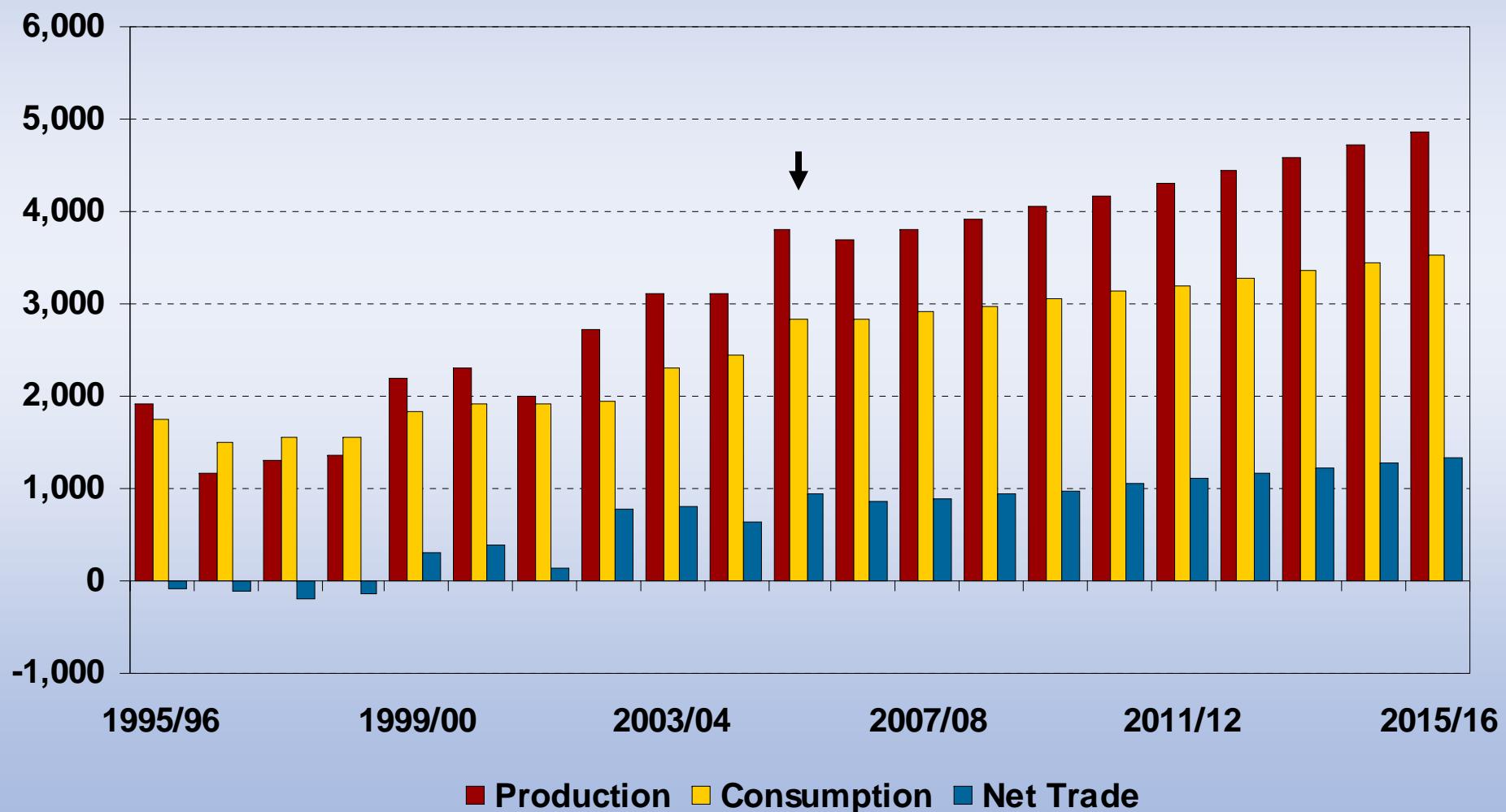
CIS Sunflower Meal Production, Consumption and Net Trade

Thousand MT



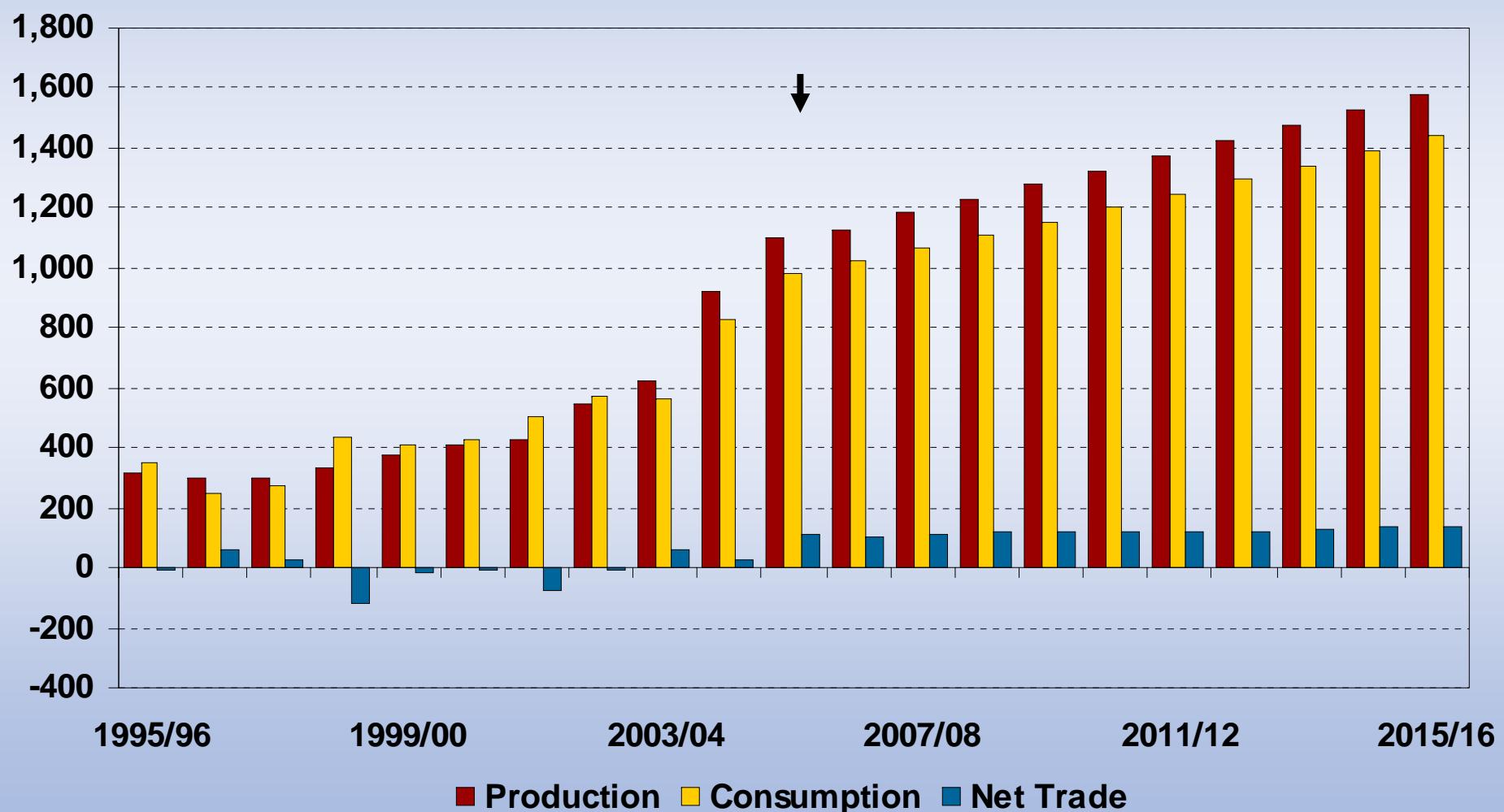
CIS Sunflower Oil Production, Consumption and Net Trade

Thousand MT



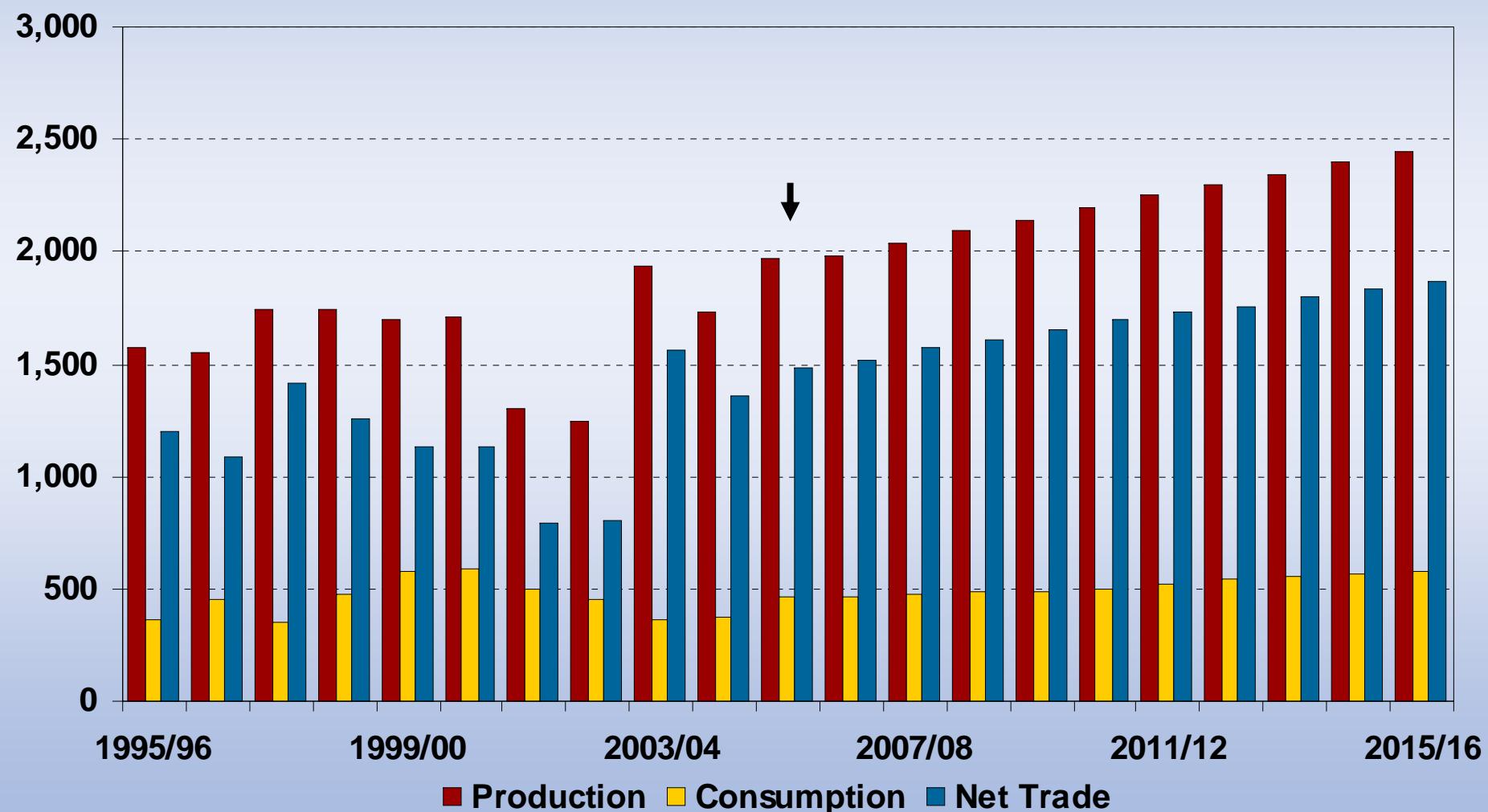
CIS Soybean Production, Consumption, and Net Trade

Thousand MT



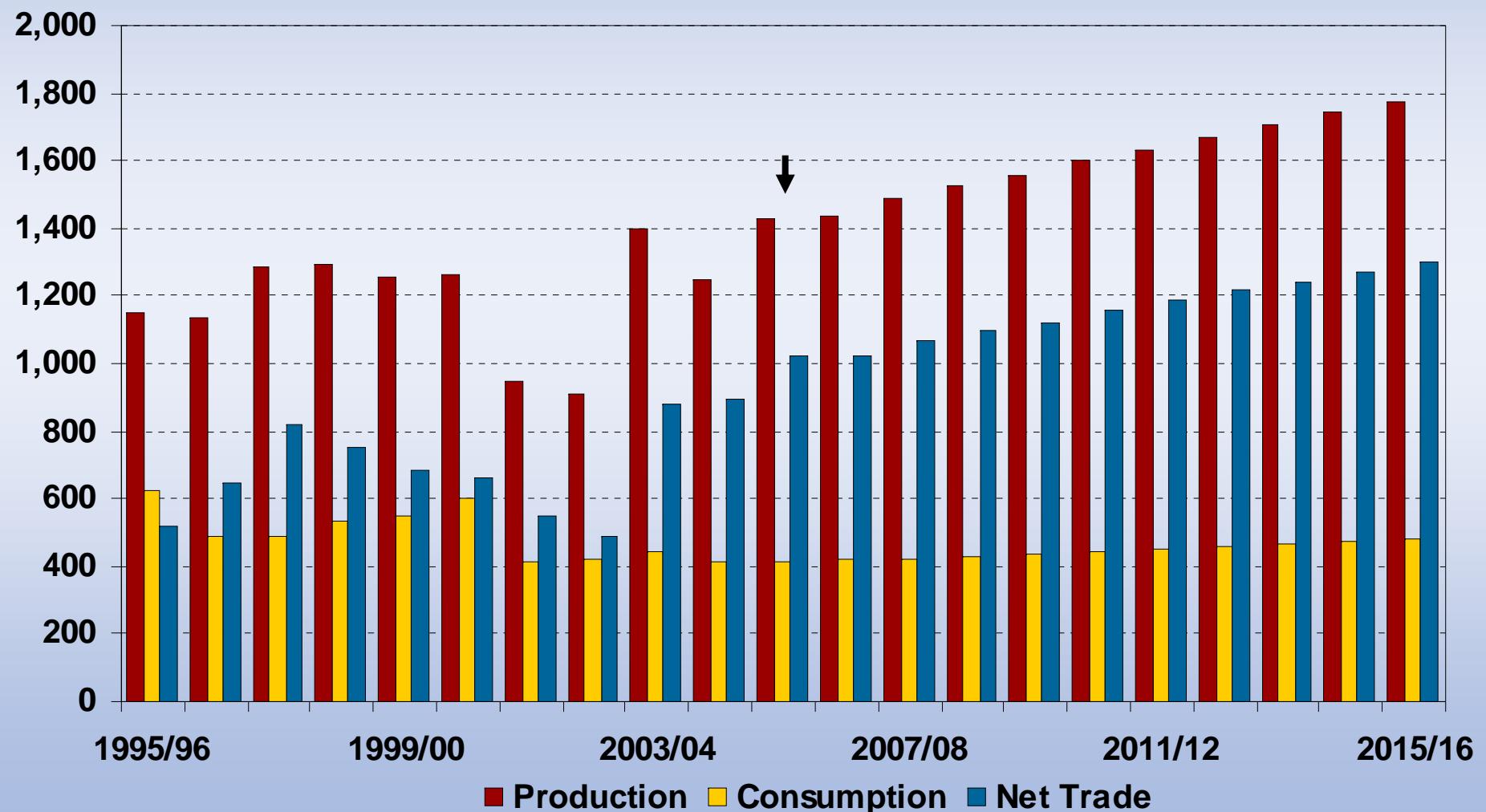
Canadian Rapeseed Meal Production, Consumption and Net Trade

Thousand MT



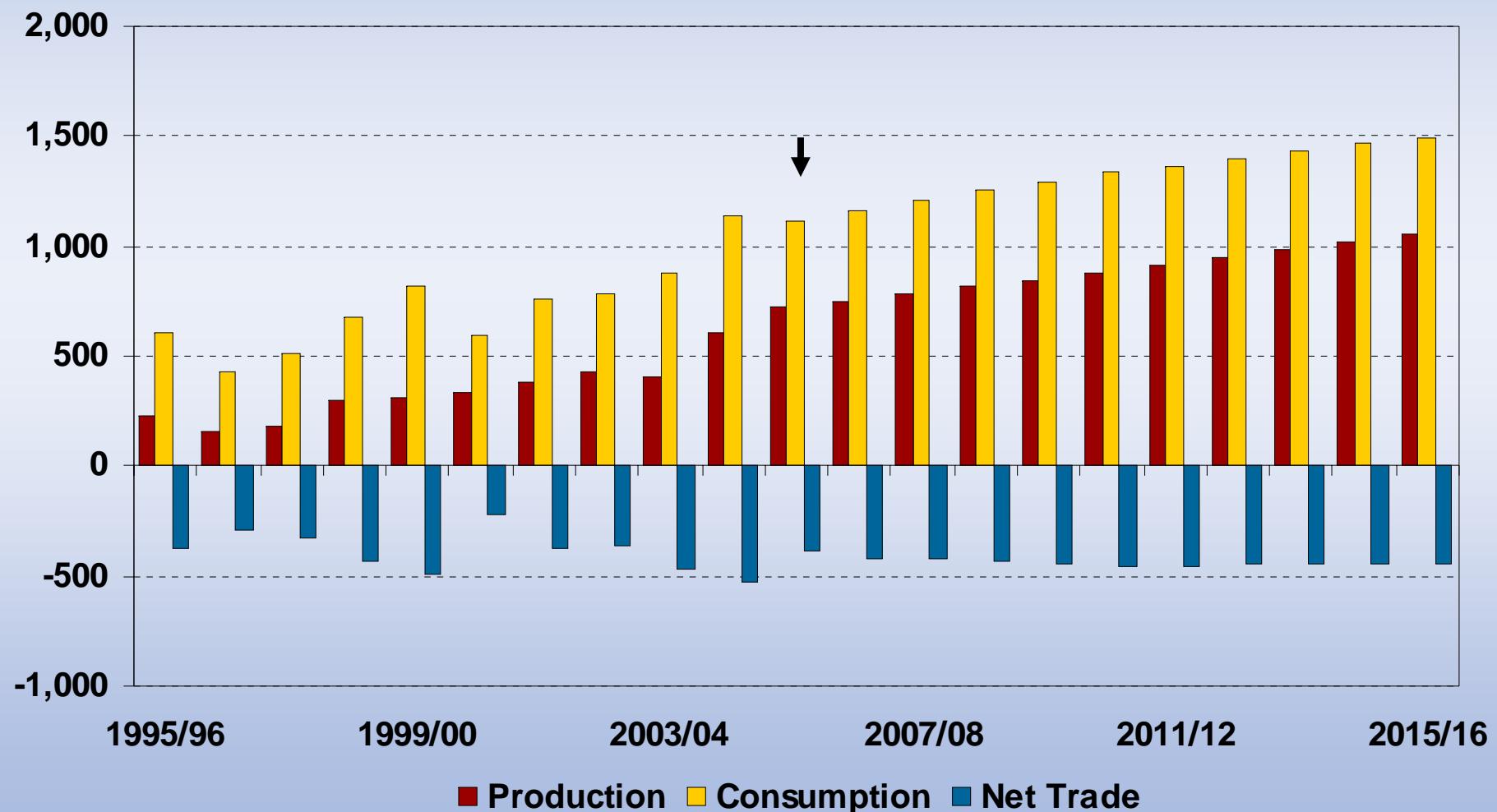
Canadian Rapeseed Oil Production, Consumption and Net Trade

Thousand MT



CIS Soybean Meal Production, Consumption, and Net Trade

Thousand MT



Asian Soybean Imports

Thousand MT

