



## **Grain & Oilseed Market Access Indexes GOMAI 9 - Wheat Report**

**A Report for:**

**North American Export Grain Association**

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A report for:  
North American Export Grain Association  
United States Soybean Export Council  
United States Grains Council

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## 1. EXECUTIVE SUMMARY

The Grain & Oilseed Market Access Indexes (GOMAI) report is a collaborative effort among the North American Export Grain Association, the U.S. Soybean Export Council, and the U.S. Grains Council to document and quantify barriers to US grain and oilseed products in international markets.

This report updates similar analyses performed from 2004 to 2013 and highlights some of the changes that have taken place. It reflects market access conditions for US grains and oilseeds in 37 countries as of the end of 2014. The earlier reports reflected conditions in varying numbers of countries as of the end of 2003, 2004, 2005, 2007, 2008, 2009, 2011, and 2012. The resulting database and market access indexes from these studies are used to:

- focus attention on the most egregious market access barriers,
- allow one to measure progress over time in improving market access,
- facilitate comparisons among countries and among commodities, and
- provide the information in a form conducive to its most effective use.

Market access is a necessary condition but not a sufficient one for generating US grain and oilseed exports to a particular country. There may also be a general lack of import demand, or economic disruption due to wars, uprisings or recessions, or an importing country may have a very open market but its buyers choose to purchase supplies from a competing exporter due to lower transportation costs or other factors.

Therefore US cooperators focus their efforts on a range of objectives that include expanding or maintaining demand in target markets (a bigger pie), expanding US market share (a bigger slice of that pie), and achieving greater market access (a seat at the table).

This year we added Romania, Syria and Trinidad to the coverage but deleted Australia, Cuba, Dominican Republic and Tunisia, for a total of 36 countries. Eleven commodities are covered: wheat, barley, corn, sorghum, malt, soybeans, soybean oil, ethanol, CGF&M (corn gluten feed and meal), distillers dried grains, and soybean meal. In 2013, we only covered ten commodities, as malt was excluded. Durum and common wheat are treated as a single category for scoring purposes, as are crude and refined soybean oil. However, in the accompanying Excel file we maintain separate sets of information for those commodities.

The Excel database that accompanies this report organizes market access barriers into three broad categories: tariffs and other price measures, quotas and other quantity measures, and technical or procedural measures. Each barrier is scored on a scale of zero to six, where zero means imports are prevented, and six indicates that imports are unrestricted. We surveyed USSEC and USGC staff and NAEGA members and consultants in order to get scores that might serve as a reality check on scores derived from our market access database. We updated the database from secondary sources and insights gained from survey results. From analysis of the revised database, we updated the set of market access indexes

## 1.1 The big picture

On balance, access to foreign markets for US grains and oilseeds was largely the same at the end of 2014 as two years earlier, the main exception being the countries where there has been civil strife. Formal tariff barriers were mostly unchanged or less onerous. Quantitative barriers also tended to be the same during the period. We reduced scores for “procedural” barriers in conflict countries.

World economic growth rose to a 3.3% annual rate in 2013 and 2014 according to the IMF, with world trade in goods and services expanding at about the same rate. The January 2015 forecast was for a slight improvement in 2015. An improving world economy and the possibility of a successful outcome for the TPP negotiations should set the stage for gains in market access for US agricultural products over the next couple of years.

## 1.2 Summary of database results

The average ratings from the database using the 0-6 scale are shown in the table below. In our scores for the end of 2005 and 2007, price measures were the most serious barrier; quantity measures the least serious, and technical and procedural somewhere in between. For 2008, the average score for quantity measures was unchanged and the average for price measures rose for the second year in a row as a number of countries reduced tariff protection, partly due to high world market prices. The average score for technical measures fell again slightly as some countries resorted more to this type of barrier.

Looking at the situation at the end of 2009, the same pattern continued: the average score on price measures rose slightly to 4.3 from 4.2 a year earlier, while the average for quantity measures fell a tenth of a percent to 5.4 and the average for technical measures fell two tenths to 3.5. (The increase in price measures was mostly due to the more lenient scoring of value added taxes that we adopted in response to a critique of the methodology.) With the passage of two more years, the changes in scoring for 2011 were again small, varying only by a tenth of a point. As of the end of 2012, the average database score for price measures fell from 4.4 to 4.3, but the averages for quantity and technical measures rose by 0.3 points to 5.6 and 3.9 respectively. However, the list of commodities and countries varied between the two years so one cannot read a lot into that comparison of average raw scores other than that they are broadly consistent.

The latest iteration of the access index produced results similar to those in GOMAI 8 except that tariff barriers were slightly less onerous and technical measures in conflict countries are proving to be more of a problem.

2014	Database
Price measures	4.4
Quantity measures	5.6
Technical measures	3.6

Agralytica analysts' scoring of the database was converted to the 100-point scale we use for the market access indexes. Index scores were generally about the same as two years ago. Brazil and Russia again received the lowest scores, at 9.0 and 26.8, respectively.

Thirteen countries had scores of 70 or higher, twelve were in the 50-69 range, seven in the 30-49 range, and only Brazil, Russia, Sudan and Syria had scores below 30. Russia entered the WTO at the end of 2012 but access for US exports has not significantly improved due to geopolitical factors.

The table below compares the current market access indexes for the end of 2014 to the scoring done for the end of 2012. It includes only those countries and commodities common to both years' studies. On a commodity basis, the weighted averages across countries ended up in a much wider range, between 28.9 and 66.3 compared to a narrower range in 2012 of 41.2 and 67.6. Average scores for corn, soybeans and soybean oil fell significantly, primarily due to lower scores for China and the large consumption weights that China has in calculating the averages for these commodities. Malt also had a low score of 31.7 for 2014, but was not included in the prior survey.

Product	Index Dec 2012	Index Dec 2014	Change
Wheat	51.9	54.0	2.1
Barley	67.6	66.3	-1.3
Corn	60.6	41.3	-19.3
Sorghum	56.5	59.9	3.4
Soybeans	51.2	28.9	-22.3
Soybean oil	41.2	30.7	-10.5
CGF&M	50.9	49.5	-1.4
DDG	52.6	50.5	-2.1
Soybean meal	53.1	52.6	-0.5

Most of the changes in the simple average of a country's ten commodity indexes are in the range of plus or minus 5 points. Four countries had scores fall by more than 10 points: Algeria, China, Iraq and Sudan. Two countries had scores increase by more than 10 points. Morocco increased by 14.3 points due to more liberal access for wheat and soybean oil. Venezuela increased by 16.3 points (but the country's foreign exchange constraints may limit the benefits to US exporters). Looking at the individual commodities, there were very few countries with more than a 10 point increase or decrease in score.

### 1.3 Summary of survey results

We had more about the same number of survey participants this time as two years ago. Each of the 36 countries was scored by representatives from USSEC, NAEGA, and/or USGC. Not all

country-commodity combinations were scored so the missing ones are marked “NR” in Table 3. For all the surveys we received, the average unweighted ratings across all the responses for the three classes of market access barrier were as follows:

	<b>Survey</b>
Price measures	4.0
Quantity measures	4.5
Technical measures	3.8

These are very close to the scores for 2012, with the price score down from 4.1, the quantity score up from 4.3, and the technical score down from 4.0.

The averages are unweighted by the importance of consumption in or trade with different countries or by the relative importance of the different commodities in US or world trade. However, the decline in the average score for technical and procedural measures in both the survey and the database scoring provides a general indication that these measures have become a bit more of a market access barrier for these US exports.

The survey results on the 100-point index scale illustrate the diversity in market access among countries. Twelve countries have scores of 70 or above and these include major trading partners like Mexico, Canada, Japan, Taiwan, and South Korea. There are ten countries in the 50-69 range, and eight countries have index scores in the 30-49 range. Six countries have scores below 30; only 2 are major markets - the EU and Russia.

In terms of the individual commodities, the weighted average index scores across the 36 countries are quite low (15.1-30.4) for all the USGC commodities except corn and ethanol. This is due in part to the heavy weight on the low scores for the EU, Russia and Turkey. Soybeans had the best overall weighted score at 67.3. Because the survey response in both years was very spotty, we do not provide a comparison to the 2012 weighted averages.

<b>Product</b>	<b>Index Dec 2014</b>
Wheat	40.9
Barley	26.9
Corn	48.0
Sorghum	15.1
Malt	26.9
Soybeans	67.3
Soybean oil	48.8
Ethanol	40.9
CGF&M	30.4
DDG	30.1
Soybean meal	55.6

#### I.4 Comparison of survey and database results

The broad similarities between the average results of the two approaches clearly disguise some larger differences in assessing market access barriers at the level of country-commodity combinations. This was probably inevitable given the different resources that each group brought to the task. Agralytica analysts applied some specific rules, working from a broad set of information including what had been highlighted by the survey respondents. The latter group was asked for subjective assessments of the relative importance of the three types of access barriers. Their responses were necessarily and appropriately colored by their own experiences in working in the trenches of market development.

Charts are provided that show how each commodity was scored in the database across the 36 countries, ranked from most protectionist at the bottom of the chart to most open at the top. When one gets down to this level of commodity-country pairs, there can be significant changes in the ranking of the countries in these charts. This is mostly due to changes in the countries' individual scores, but is also influenced by changes in the list of countries.

For each country, we provide a two-page discussion including a figure showing both the survey and database indexes on a commodity-by-commodity basis. The commodities are ranked using the database indexes, with the most protected commodity at the bottom of the chart, and those for which there is better market access for US origin material at the top. The corresponding index from the survey is shown as the upper, lighter bar of each pair (or the light blue bar if viewed in color). An "NR" indicates that there was no survey response for that commodity-country pairing. If there is no bar at all and no "NR", the index is zero, implying virtually no access to that market for the US product. Each chart is accompanied by brief commentary on the market access picture and the grain-oilseed situation in the country, with the relevant supply-demand balance, if available, from USDA's PSD online database.

## 2. METHODOLOGY

This section reviews the methodology for the different parts of the project: the survey of experts, analysis of the survey results, desk research for constructing the database, scoring of the database, and preparation of the final market access indexes. We used the same methodology for database scoring as in the reports prepared in 2004 - 2013. The survey and database cover the 36 countries listed below. This year we added Romania, Syria, and Trinidad and deleted Australia, Cuba, the Dominican Republic and Tunisia.

Algeria	Japan	South Korea
Brazil	Lebanon	Sudan
Canada	Libya	Syria
China	Malaysia	Taiwan
Colombia	Mexico	Thailand
Costa Rica	Morocco	Trinidad
Ecuador	Nigeria	Turkey
Egypt	Pakistan	Venezuela
European Union	Peru	Vietnam
Guatemala	Philippines	Yemen
India	Romania	
Indonesia	Russia	
Iraq	Saudi Arabia	

Eleven commodities in the wheat, coarse grain, and soybean sectors are included:

Wheat	Soybean oil
Barley	Ethanol
Corn	Corn gluten feed & meal (CGF&M)
Sorghum	Brewers and distillers grains (DDGS)
Malt	Soybean Meal
Soybeans	

### 2.1 Survey methodology

We e-mailed the survey to the country directors of the U.S. Soybean Export Council and U.S. Grains Council in early April 2015. In addition, one NAEGA trade consultant and NAEGA staff completed surveys on wheat, corn and soybeans for selected countries. We also sent an Excel file that provided the prior survey scores for purposes of comparison.

The survey asked respondents to rate three categories of market access barrier on a scale of “0 to 6” where “0” was virtually no access and “6” was unfettered access. We converted the 0-6 scores to match our historic 1-7 scale before entering them into the database.

The three categories were the following:

- **Price measures** like tariffs, import fees, taxes, etc.
- **Quantity measures** like quotas, import licensing, monopoly purchasers, etc., and
- **Technical or procedural measures** that make trade more difficult, expensive, or risky like customs procedures, sanitary and phytosanitary regulations, corruption, etc.

## 2.2 Database scoring and aggregation

We group trade barriers in five categories in the database:

- **Tariffs**
- **Other price measures** like import fees, customs charges, taxes, etc.
- **Quotas**
- **Other quantity measures** like import licensing, monopoly purchasers, etc., and
- **Technical or procedural measures** that make trade more difficult, expensive, or risky like customs procedures, sanitary and phytosanitary regulations, corruption, etc.

While we now score the database using a zero to six scale, rather than the one to seven scale used in the initial years, we still convert those results to a zero to 100 scale by the same method, described below in Section 2.4.4. For purposes of summarizing and analyzing the results, one has to weight the responses for each country-commodity pair, for each commodity across all countries, and for each country across all the commodities. The procedures used are reviewed below.

**Weights for commodity-country pairs.** We again simply weighted the three measures - price, quantity, and technical - equally in calculating the average index for a commodity in a particular country, in the absence of a rationale for any alternative set of unequal weights.

**Weights for a commodity across all countries.** Quantities of production, consumption, or trade are the obvious alternative weighting factors for coming up with a single market access index for US exports of a commodity to this set of 36 countries. Using trade data would underweight countries that successfully block or limit imports from the United States. Therefore, where possible, we again used total domestic disappearance in 2013/14 from USDA's PS&D database. In the case of DDG we used total consumption of corn, barley and sorghum. Since soybean meal and oil compete with a wide range of oilseed meals and fats and oils, we used Oil World's 2013/14 domestic disappearance of those broader categories as weights. For ethanol we used a simple average because domestic disappearance estimates are not readily available.

**Weights for a country across all commodities.** Since some of these commodities have markedly different unit values, using quantities as weights is less appropriate. Yet the value of domestic use is generally not available. We therefore use a simple average of the indexes for each commodity.

## 2.3 Database research methodology

In constructing the database we drew on the same wide range of materials we have used in the past. For the bulk of the information, we relied on six main sources: the Foreign Agriculture Service (FAS), the US Trade Representative (USTR), the Department of Commerce (DOC), the Animal and Plant Health Inspection Service (APHIS), and the Global Tariff database and a multitude of other tariff sources. Where available, we also relied on specific country government or regional trade association websites and material from the Economist Intelligence Unit.

### 2.3.1 FAS

For nearly every country, we used the 2012 and 2013 Grain and Oilseed attaché reports, the most recent FAIRS reports, and any other relevant reports. In general, the attaches provided useful information regarding tariffs and other trade policy issues. However, some reports provided little or no information. The FAIRS reports provided some useful technical information and occasionally provided tariff measures. All reports can be found at the following web link: <http://gain.fas.usda.gov/Lists/Advanced%20Search/AllItems.aspx> .

### 2.3.2 USTR

The USTR's 2013 National Trade Estimate Report on Foreign Trade Barriers provided general trade barrier information by country. USTR supplemented this with separate 2013 reports on Sanitary and Phytosanitary Measures and Technical Barriers to Trade. The three reports provided coverage for many countries, but there was no information for some countries. We also used the most recent USGC submission to USTR on trade barriers of concern.

The reports included the most restrictive measures in place that affect US market access. Such measures included tariff and non-tariff price measures, quantitative measures (quotas, licenses, and import bans), and technical measures (SPS, biotechnology regulation, customs procedures, and corruption).

In addition to other sectors, the reports addressed general agriculture issues. However, there was a commodity focus if significant commodity-specific barriers existed. They can be accessed at:

<http://www.ustr.gov/sites/default/files/2013%20NTE.pdf>

<http://www.ustr.gov/sites/default/files/2013%20SPS.pdf>

<http://www.ustr.gov/sites/default/files/2013%20TBT.pdf>

A country-by-country set of reports from the USTR was also used. They are available at: <http://www.ustr.gov/about-us/press-office/reports-and-publications/2013/NTE-FTB>

### 2.3.3 DOC

The Commerce Department's export.gov site provides some overview information related to trade. The information from export.gov is useful to see overall trade patterns and where exports are going by HS chapter. While the information provided is excellent, it is not detailed enough to analyze more than one chapter at a time, or compare HS chapters.

<http://tse.export.gov/>

The more useful tool is the Customs Info Database, which is free if accessed through the export.gov site at the following link:

[http://export.gov/logistics/eg\\_main\\_018130.asp](http://export.gov/logistics/eg_main_018130.asp)

### 2.3.4 APHIS

APHIS and Plant Protection and Quarantine (PPQ) operate the Phytosanitary Certificate Issuance and Tracking System (PCIT), which maintains the Phytosanitary Export database (PEXD). This database (PEXD) covers the most recent sanitary and phytosanitary requirements for imported plants by country.

<https://pcit.aphis.usda.gov/pcit/>

### 2.3.5 Tariff Information

Tariff information was the most difficult to compile. Since our last report the centralized tariff databases we had been using have either gone out of business, or converted to subscription services. Unfortunately, these subscriptions cost many thousands of dollars, and several would have to be used for a complete dataset. The costs are prohibitive. Because of the difficulty of obtaining accurate and up to date tariff information, we tried to use at least two sources to verify the current applied tariff rates. In many cases, this was impossible because of conflicting information so, it was decided in those cases to use the most recent data. If the USDA reports contained tariff information, it was considered the most up to date.

We used the International Customs Tariff Bureau extensively in the past; however, the information is hard to access and not always up to date. The BITD has PDF's of the official published tariff schedule of many countries.

<http://www.bitd.org/HomePage.aspx>

This year we used a new source for the majority of our tariff research. The database we used is operated by CUSTOMS info and grants free access to users of export.gov, the US export website. The Global Tariffs database is easy to use, and also contains information on taxes and other import fees. The Global Tariffs database can be accessed at:

<http://export.customsinfo.com/Default.aspx>

In several cases, we had to resort to the tariff schedule of a country that is published online. These were accessed directly for each country through the customs website.

### 2.3.6. Changes in methodology for the Corruption Index

Transparency International (TI) has changed its scoring methodology for its 2012 data set and beyond. A detailed explanation (from its website) is given below, but a briefer summary of the change and how it impacts GOMAI follows.

*... in 2012, Transparency International has updated the methodology used to construct the CPI. Essentially, Transparency International is using a simpler approach that is easy to follow and understand and that can better capture changes in perceptions of corruption over time. This is possible now due to the increased number and quality of data sources which capture perceptions of corruption across multiple countries.*

*In previous editions of the CPI, the methodology drew on a country/territory's rank position in the data sources, to capture perceptions of corruption as compared with other countries/territories. The 2012 CPI uses the raw scores given to any country/territory and then converts these raw scores to fit the CPI scale. To reflect the changes that have been made to the method used to rescale the data sources, the scale on which the CPI is presented has also been updated, to 0-100. With this updated method, it is much clearer to trace this back to the raw scores given in the data sources. This also means that any changes from year to year in the raw scores will therefore be directly translated into a change in the rescaled score from that data source, and will not be affected by changes in scores of other countries/territories also featured in the data source.*

*Starting in 2013, as a consequence of this update, it will be possible to reflect changes over time at the country level. The updated methodology also uses just one year of data from each source for each country, which allows changes over time to be better captured. Previously the CPI had included the past two years of business survey data.*

In other words, the Corruption Index rankings and scores used to be built on *relative* positions in the data sets that fed the scoring algorithm; now they are built on the *actual values* in the data sets that feed the algorithm. Fortunately, the GOMAI transitions easily and cleanly to this new methodology.

We now use the following ranges for scoring for corruption:

<u>TI score</u>	<u>Impact on GOMAI score</u>
0-19	-1 penalty
20-44	-0.5 penalty
45-100	no penalty

## 2.4 Protocols for scoring the database

First, it is important to remember that we were trying to assess conditions as of the end of 2014. We note any changes scheduled to take place in early 2015, but the scores are based on rules and practices in effect in December 2014.

In each of the three classes of barrier, every country started as a six and then we applied a series of deductions, as outlined below, based on the particular market access barriers identified in the database.

While traders might view a particular measure as simply a cost of doing business rather than an effective market access barrier, e.g. a 10% tariff that applies to imports from all countries, we treated all measures that discourage imports of US products as market access barriers to one degree or another.

### 2.4.1 Price measures

Tariffs are the main barrier and in most cases are specified in percentage terms. However there are also tariffs of fixed amounts per unit, and variable tariffs such as those under the Andean Price Band system. Other price-related measures to be taken into account in some way include taxes (VAT, excise, sales, etc.), advance payment requirements, foreign exchange controls, and tariff preferences for competitors. We used the following rules of thumb in scoring the price measures in the database:

For tariffs, the deductions were as follows:

Tariff (%)	Penalty
0	0
1-10	-1
11-20	-2
21-30	-3
31-40	-4
41-50	-5
> 50	-6

For absolute rather than percentage tariffs, we converted to a percentage basis using representative recent market prices (average US export values for 2014 plus estimated transportation costs).

For variable tariffs like the Andean Price Band system, we deducted an additional one point beyond those called for by the base tariff level because this type of system tends to keep prices stable in the country using it while forcing all the market adjustment onto other importers and exporters. In addition, if there were tariff preferences for significant competing suppliers, we deducted one.

For VAT and other taxes that are applied to both domestic and imported products, we deduct nothing if the tax is 15% or less and 0.5 if more than 15%. If they applied only to imports, we treated them as an additional tariff.

For advance payment requirements or foreign exchange controls, we deducted 0.5.

#### 2.4.2 Quantity measures

The basic quantity barriers are tariff rate quotas, which may or may not be restrictive. In addition, various countries have import licensing, local purchase requirements, monopoly purchasers or other measures that potentially limit trade.

If there is an import ban, we deducted 6. If there is a TRQ, we deducted at least one, and as much as 5 depending on the degree of restrictiveness.

For import licensing, import permits, preshipment authorization, a monopoly purchaser, or a domestic purchase requirement, we deducted one in each instance.

#### 2.4.3 Technical and procedural measures

For the countries under study, the measures most frequently mentioned were SPS barriers (inspections, quarantine, testing), GMO labeling or sensitivity, and corruption.

To score corruption, we deducted one if the country's score on the Transparency International list was below 20. We deducted 0.5 if the score was between 20 and 44.

For GMO labeling requirements, we deducted one if there is a 5% or more threshold, 3 if there is a 1% or less threshold, and 2 if between 1% and 5%. For bans on varieties approved in the United States that tend to preclude trade, we deducted up to 6 depending on impact. If customs procedures were mentioned, we deducted one. For SPS barriers (inspections, quarantine, testing) we deducted 1-3 depending on severity.

We viewed these as rules of thumb. In some cases, the deductions added up to more than six but our rating scale constrained us to a rating no less than zero. In other cases where we ended up with a rating of zero but there was still a significant level of US exports to the country, we adjusted the rating upwards to a one or two.

#### 2.4.4 Conversion to a 100-point scale

In converting the ratings to an index, we decided in 2004 to insure that in cases where imports were effectively blocked by some access measure and the rating was a "1" on the one-to-seven scale used then that the index would be zero. This year we accomplished this by adding "1" to each score of 0 to 6, taking the natural logarithm of the result, and multiplying the three natural logs together to get a converted average survey score. Since the natural log of one is zero, this ensured that a closed market received a zero score.

A perfect rating of three sevens would translate into 7.368 when the three natural logs of 1.946 are multiplied together. To convert this and all other combinations to a 100-point scale, we divided 100 by 7.368, getting 13.572 and then multiplied this factor times all the converted average survey scores.

The resulting scale is slightly non-linear, giving a downward bias to the scores. For example, three threes, which one can think of as the midpoint of a 0 to 6 scale, translate into a rounded score of 36. Three fours yield a score of 57. Another result is that the more dispersed the three ratings are, the lower the index. A 5, 4 and 3 will yield an index of 54 while a 6, 4 and 2 result in a 47. Yet the average of the three ratings in both cases is 5. This has the effect of giving a heavier weight to a low rating.

## 2.5 Preparation of the final indexes

The ratings that we gave each country for the three types of market access barrier are preserved in an Excel file provided separately to study sponsors. After conversion to a 100-point scale as described above, the resulting market access indexes based on our analysis of the database are presented in tables and charts in the following discussion of the results.

### 3. REVIEW OF RESULTS

#### 3.1. Database results

The average ratings from the database using the 0-6 scale are shown in the table below. In our scores for the end of 2005 and 2007, price measures were the most serious barrier; quantity measures the least serious, and technical and procedural somewhere in between. For 2008, the average score for quantity measures was unchanged and the average for price measures rose for the second year in a row as a number of countries reduced tariff protection, partly due to high world market prices. The average score for technical measures fell again slightly as some countries resorted more to this type of barrier.

Looking at the situation at the end of 2009, the same pattern continued: the average score on price measures rose slightly to 4.3 from 4.2 a year earlier, while the average for quantity measures fell a tenth of a percent to 5.4 and the average for technical measures fell two tenths to 3.5. (The increase in price measures was mostly due to the more lenient scoring of value added taxes that we adopted in response to a critique of the methodology.) With the passage of two more years, the changes in scoring for 2011 were again small, varying only by a tenth of a point. As of the end of 2012, the average database score for price measures fell from 4.4 to 4.3, but the averages for quantity and technical measures rose by 0.3 points to 5.6 and 3.9 respectively. However, the list of commodities and countries varied between the two years so one cannot read a lot into that comparison of average raw scores other than that they are broadly consistent.

The latest iteration of the access index produced results similar to those in GOMAI 8 except that tariff barriers were slightly less onerous and technical measures in conflict countries are proving to be more of a problem.

	Database
Price measures	5.4
Quantity measures	6.6
Technical measures	4.6

Agralytica analysts' scoring of the database was converted to the 100-point scale we use for the market access indexes. Index scores were generally about the same as two years ago. Brazil and Russia again received the lowest scores, at 9.0 and 26.8, respectively.

Thirteen countries had scores of 70 or higher, twelve were in the 50-69 range, seven in the 30-49 range, and only Brazil, Russia, Sudan and Syria had scores below 30. Russia entered the WTO at the end of 2012 but access for US exports has not significantly improved due to geopolitical factors.

The table below compares the current market access indexes for the end of 2014 to the scoring done for the end of 2012. It includes only those countries and commodities common to both years' studies. On a commodity basis, the weighted averages across countries ended up in a

much wider range, between 28.9 and 66.3 compared to a narrower range in 2012 of 41.2 and 67.6. Average scores for corn, soybeans and soybean oil fell significantly, primarily due to lower scores for China and the large consumption weights that China has in calculating the averages for these commodities. Malt also had a low score of 31.7 for 2014, but was not included in the prior survey.

Product	Index Dec 2012	Index Dec 2014	Change
Wheat	51.9	54.0	2.1
Barley	67.6	66.3	-1.3
Corn	60.6	41.3	-19.3
Sorghum	56.5	59.9	3.4
Soybeans	51.2	28.9	-22.3
Soybean oil	41.2	30.7	-10.5
CGF&M	50.9	49.5	-1.4
DDG	52.6	50.5	-2.1
Soybean meal	53.1	52.6	-0.5

Most of the changes in the simple average of a country's ten commodity indexes are in the range of plus or minus 5 points. Four countries had scores fall by more than 10 points: Algeria, China, Iraq and Sudan. Two countries had scores increase by more than 10 points. Morocco increased by 14.3 points due to more liberal access for wheat and soybean oil. Venezuela increased by 16.3 points (but the country's foreign exchange constraints may limit the benefits to US exporters). Looking at the individual commodities, there were very few countries with more than a 10 point increase or decrease in score.

### 3.2. Survey results

We had more about the same number of survey participants this time as two years ago. Each of the 36 countries was scored by representatives from USSEC, NAEGA, and/or USGC. Not all country-commodity combinations were scored so the missing ones are marked "NR" in Table 3. For all the surveys we received, the average unweighted ratings across all the responses for the three classes of market access barrier were as follows:

	Survey
Price measures	4.0
Quantity measures	4.5
Technical measures	3.8

These are close to the scores for 2012, but the 2013 study covered slightly different countries and commodities so the averages presented are not strictly comparable. The price score is down from 4.1, the quantity score up from 4.3, and the technical score down from 4.0.

The averages are unweighted by the importance of consumption in or trade with different countries or by the relative importance of the different commodities in US or world trade. However, the decline in the average score for technical and procedural measures in both the survey and the database scoring provides a general indication that these measures have become a bit more of a market access barrier for these US exports.

The survey results on the 100-point index scale illustrate the diversity in market access among countries. Twelve countries have scores of 70 or above and these include major trading partners like Mexico, Canada, Japan, Taiwan, and South Korea. There are ten countries in the 50-69 range, and eight countries have index scores in the 30-49 range. Six countries have scores below 30; only 2 are major markets - the EU and Russia.

In terms of the individual commodities, the weighted average index scores across the 36 countries are quite low (15.1-30.4) for all the USGC commodities except corn and ethanol. This is due in part to the heavy weight on the low scores for the EU, Russia and Turkey. Soybeans had the best overall weighted score at 67.3. Because the survey response in both years was very spotty, we do not provide a comparison to the 2012 weighted averages.

Product	Index Dec 2014
Wheat	40.9
Barley	26.9
Corn	48.0
Sorghum	15.1
Malt	26.9
Soybeans	67.3
Soybean oil	48.8
Ethanol	40.9
CGF&M	30.4
DDG	30.1
Soybean meal	55.6

### 3.3. Comparison of survey and database results

The broad similarities between the average results of the two approaches clearly disguise some larger differences in assessing market access barriers at the level of country-commodity combinations. This was probably inevitable given the different resources that each group brought to the task. Agralytica analysts applied some specific rules, working from a broad set of information including what had been highlighted by the survey respondents. The latter group was asked for subjective assessments of the relative importance of the three types of access barriers. Their responses were necessarily and appropriately colored by their own experiences in working in the trenches of market development.

Charts are provided that show how each commodity was scored in the database across the 36 countries, ranked from most protectionist at the bottom of the chart to most open at the top. When one gets down to this level of commodity-country pairs, there can be significant changes in the ranking of the countries in these charts. This is mostly due to changes in the countries' individual scores, but is also influenced by changes in the list of countries.

For each country, we provide a two-page discussion including a figure showing both the survey and database indexes on a commodity-by-commodity basis. The commodities are ranked using the database indexes, with the most protected commodity at the bottom of the chart, and those for which there is better market access for US origin material at the top. The corresponding index from the survey is shown as the upper, lighter bar of each pair (or the light blue bar if viewed in color). An "NR" indicates that there was no survey response for that commodity-country pairing. If there is no bar at all and no "NR", the index is zero, implying virtually no access to that market for the US product. Each chart is accompanied by brief commentary on the market access picture and the grain-oilseed situation in the country, with the relevant supply-demand balance, if available, from USDA's PSD online database.

Table 1: Average market access rating - database for end of 2014

Average rating	Wheat	Barley	Corn	Sorghum	Malt	Soybeans	SBO	Ethanol	CGF&M	DDG	SBM	Average
Algeria	49.5	50.8	68.4	58.9	46.7	58.9	46.7	29.5	29.5	29.5	58.9	47.9
Brazil	27.5	0.0	0.0	0.0	29.5	0.0	0.0	0.0	17.2	17.2	7.4	9.0
Canada	68.5	88.6	88.6	96.2	96.2	96.2	96.2	96.2	96.2	96.2	96.2	92.3
China	62.4	63.9	28.7	72.5	80.7	27.5	25.4	34.3	45.3	33.5	45.3	47.2
Colombia	87.6	87.6	74.3	87.6	84.3	87.6	92.5	92.5	96.2	96.2	96.2	89.3
Costa Rica	92.1	92.1	88.6	88.6	92.1	92.1	96.2	92.1	96.2	96.2	88.6	92.2
Ecuador	63.9	63.9	33.5	49.8	80.7	33.5	49.5	41.3	72.5	56.4	56.4	54.7
Egypt	71.2	71.2	71.2	71.2	71.2	71.2	71.2	63.9	67.7	67.7	67.7	69.6
EU	76.2	76.2	65.6	32.8	0.0	56.5	0.0	76.2	33.5	65.6	56.5	49.0
Guatemala	80.7	80.7	74.3	80.7	80.7	80.7	80.7	79.6	74.4	88.6	88.6	80.9
India	13.4	61.9	0.0	16.1	30.3	0.0	59.3	59.3	43.6	43.6	43.6	33.7
Indonesia	56.4	56.4	56.4	67.7	56.4	56.4	56.4	36.3	67.7	59.3	67.7	57.9
Iraq	66.7	72.5	57.5	72.5	68.4	65.6	68.5	0.0	62.4	62.4	65.6	60.2
Japan	56.7	84.8	54.3	88.6	88.6	71.2	58.9	100.0	92.1	92.1	92.1	79.9
Lebanon	87.6	87.6	87.6	84.3	80.7	87.6	87.6	76.8	84.3	84.3	87.6	85.1
Libya	76.2	76.2	76.2	76.2	68.4	76.2	76.2	84.8	76.2	76.2	76.2	76.2
Malaysia	92.1	92.1	92.1	92.1	92.1	92.1	84.8	65.6	100.0	100.0	100.0	91.2
Mexico	77.3	71.2	77.3	77.3	77.3	82.7	82.7	87.6	82.7	82.7	82.7	80.1
Morocco	77.6	84.3	34.3	84.3	49.5	34.3	84.3	18.3	76.8	84.3	84.3	64.7
Nigeria	65.8	68.4	63.9	63.9	58.9	63.9	0.0	55.1	68.4	58.9	58.9	56.9
Pakistan	46.7	65.6	27.1	71.2	72.5	29.5	65.6	0.0	76.2	0.0	76.2	48.2
Peru	84.3	84.3	74.3	84.3	84.3	84.3	92.5	80.7	84.3	84.3	84.3	83.8
Philippines	76.2	70.1	33.3	70.1	72.5	70.1	70.1	54.3	70.1	70.1	73.3	66.4
Romania	76.2	76.2	76.2	76.2	45.5	56.5	0.0	76.2	33.5	65.6	56.5	58.0
Russia	29.5	29.5	29.5	29.5	32.8	32.8	20.1	0.0	29.5	29.5	32.8	26.8
Saudi Arabia	92.1	92.1	92.1	84.8	92.5	92.1	92.1	80.7	84.8	84.8	92.1	89.1
South Korea	65.6	76.2	65.6	100.0	78.1	65.6	63.1	76.2	84.8	79.6	82.7	76.1
Sudan	31.9	31.9	31.9	31.9	31.9	26.6	36.4	0.0	36.4	36.4	26.6	29.2
Syria	32.8	32.8	32.8	32.8	32.8	32.8	17.7	14.8	32.8	32.8	32.8	29.8
Taiwan	68.4	68.4	65.6	76.2	72.5	65.6	68.4	68.4	65.6	65.6	65.6	68.2
Thailand	71.2	71.2	36.2	71.2	65.6	60.4	0.0	62.4	65.6	65.6	60.4	57.3
Trinidad	56.5	56.5	56.5	31.9	56.5	46.7	31.9	40.2	56.5	56.5	56.5	49.6
Turkey	48.7	48.7	14.3	30.9	37.0	63.1	0.0	42.2	17.7	0.0	47.9	31.9
Venezuela	48.7	54.3	48.7	50.7	30.9	45.5	63.0	65.5	57.5	57.5	57.5	52.7
Vietnam	79.6	82.7	82.7	79.6	76.2	79.6	72.5	46.7	68.4	79.6	79.6	75.2
Yemen	70.1	70.1	63.0	63.0	63.0	63.0	63.0	0.0	63.0	63.0	63.0	58.6
<b>Weighted average</b>	<b>54.0</b>	<b>66.3</b>	<b>41.3</b>	<b>59.9</b>	<b>31.7</b>	<b>28.9</b>	<b>30.7</b>	<b>52.7</b>	<b>49.5</b>	<b>50.5</b>	<b>52.6</b>	

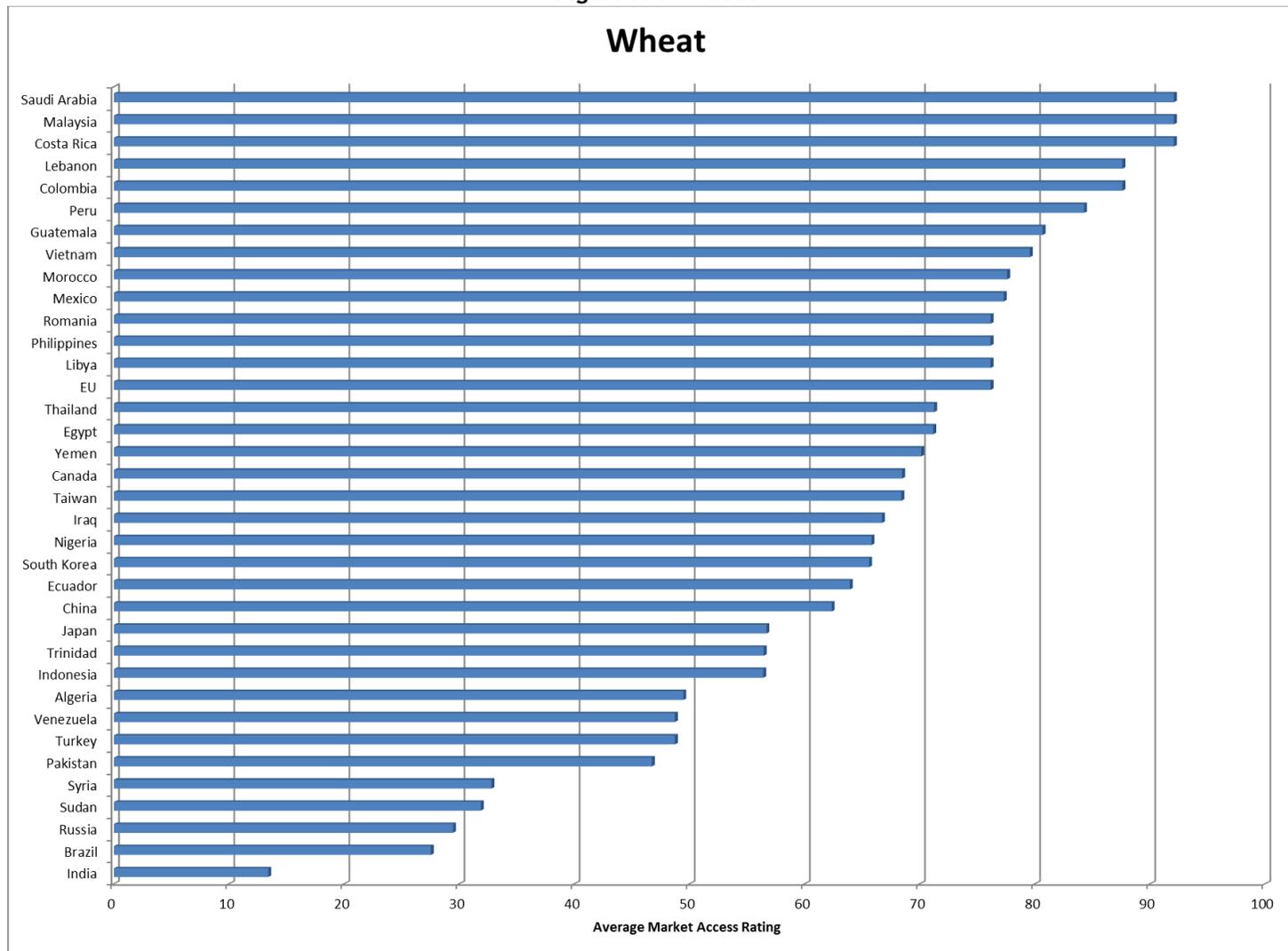
Table 2: Change in database scores from end of 2012 to 2014

Database	Wheat	Barley	Corn	Sorghum	Soybeans	SBO	Ethanol	CGF&M	DDG	SBM	Average
Algeria	-6.9	-4.3	-4.1	-3.5	-13.6	-21.0	-11.8	-11.8	-11.8	-13.6	-10.3
Brazil	23.2	0.0	0.0	0.0	0.0	0.0	-19.2	0.0	0.0	0.0	0.4
Canada	0.0	7.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7
China	0.0	-10.5	-48.9	4.8	-46.9	-33.5	-20.0	0.0	-2.9	0.0	-15.8
Colombia	0.0	0.0	7.6	0.0	6.9	3.9	0.0	0.0	7.6	0.0	2.6
Costa Rica	0.0	0.0	10.5	7.9	0.0	0.0	4.5	0.0	0.0	7.0	3.0
Ecuador	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Egypt	7.3	7.3	7.3	11.5	-1.3	-1.3	1.5	0.0	0.0	0.0	3.2
EU	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Guatemala	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
India	0.0	0.0	0.0	0.0	-36.3	0.0	59.3	0.0	0.0	7.3	3.0
Indonesia	0.0	0.0	0.0	0.0	3.2	3.2	0.0	0.0	0.0	0.0	0.6
Iraq	0.0	-3.7	-4.9	-3.7	-2.9	0.0	-82.7	-8.8	-3.2	-2.9	-11.3
Japan	-2.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.2
Lebanon	0.0	0.0	0.0	-3.3	0.0	0.0	0.0	0.0	0.0	3.3	0.0
Libya	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Malaysia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Mexico	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Morocco	77.6	0.0	0.0	0.0	0.0	66.0	0.0	0.0	0.0	0.0	14.3
Nigeria	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Pakistan	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Peru	0.0	0.0	-3.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.4
Philippines	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Russia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Saudi Arabia	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
South Korea	5.2	6.1	5.2	0.0	5.2	0.0	0.0	0.0	3.4	6.5	3.1
Sudan	-14.8	-14.8	-14.8	-14.8	-33.1	-23.3	0.0	-23.3	-23.3	-33.1	-19.5
Taiwan	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Thailand	0.0	0.0	-5.8	0.0	6.1	0.0	0.0	0.0	0.0	2.9	0.3
Turkey	24.8	21.0	-9.6	0.0	0.0	0.0	0.0	-42.7	-60.4	-12.5	-7.9
Venezuela	15.4	7.6	15.4	13.7	12.2	20.0	17.6	20.5	20.5	20.5	16.3
Vietnam	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Yemen	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

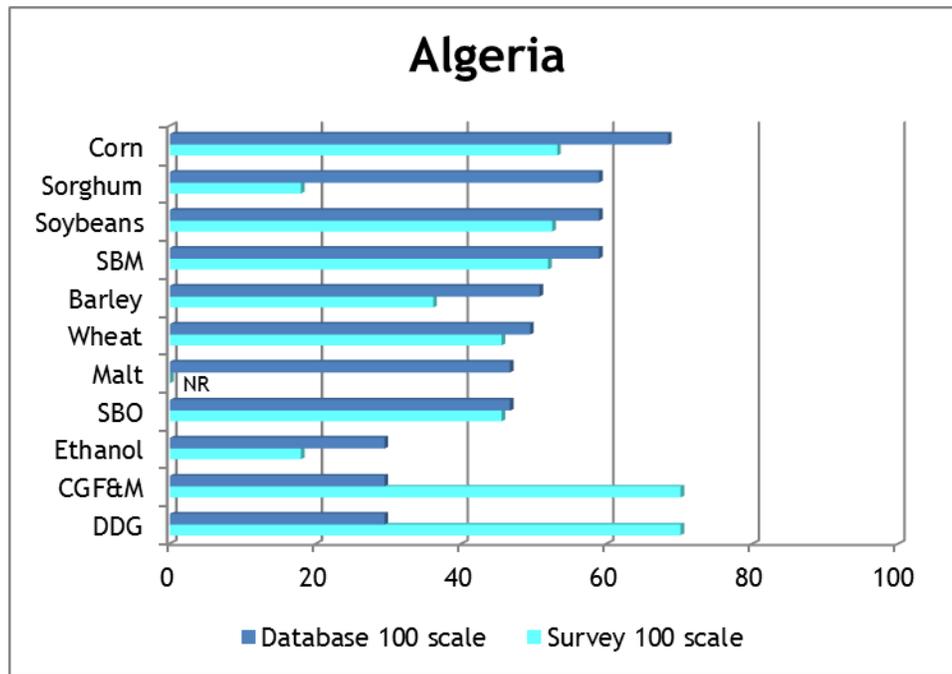
Table 3: Average market access rating - survey for end of 2014

Average rating	Wheat	Barley	Corn	Sorghum	Malt	Soybeans	SBO	Ethanol	CGF&M	DDG	SBM	Average
Algeria	45.5	36.2	53.2	18.0	NR	52.5	45.5	18.0	70.1	70.1	51.9	46.1
Brazil	30.1	78.1	55.6	78.1	78.1	50.8	NR	78.1	78.1	78.1	NR	67.2
Canada	80.7	92.1	87.3	92.1	92.1	86.1	96.2	92.1	92.1	92.1	92.5	90.5
China	36.2	NR	48.7	NR	NR	77.4	56.6	NR	NR	NR	60.4	55.9
Colombia	74.3	84.8	66.0	43.0	78.1	79.2	89.0	16.6	92.1	92.1	89.0	73.1
Costa Rica	60.4	100.0	73.3	100.0	100.0	77.6	84.8	92.1	100.0	100.0	78.1	87.8
Ecuador	36.2	63.0	18.9	28.7	63.0	63.9	36.2	52.0	76.2	76.2	74.3	53.5
Egypt	43.6	NR	52.3	NR	NR	62.7	65.6	NR	NR	NR	71.2	59.1
EU	46.2	18.0	15.7	33.3	0.0	51.5	NR	7.2	37.0	37.0	41.4	28.7
Guatemala	66.7	81.6	69.5	88.6	100.0	75.1	92.1	81.6	96.2	96.2	84.8	84.8
India	38.6	37.0	31.4	21.0	NR	46.4	100.0	37.0	0.0	0.0	28.7	34.0
Indonesia	65.5	46.7	56.3	33.3	NR	77.2	60.4	28.7	71.2	65.6	78.1	58.3
Iraq	23.4	36.2	32.7	18.0	NR	59.0	68.5	56.6	18.0	18.0	68.5	39.9
Japan	81.1	78.1	84.7	100.0	100.0	92.1	71.2	35.6	100.0	100.0	100.0	85.7
Lebanon	NR	70.1	78.1	56.6	NR	72.5	49.5	36.2	48.7	48.7	62.4	58.1
Libya	NR	56.6	18.0	18.0	0.0	NR	NR	4.5	18.0	18.0	NR	19.0
Malaysia	56.0	84.8	61.9	92.1	NR	78.1	68.4	42.0	76.2	76.2	76.2	71.2
Mexico	64.4	NR	64.4	NR	NR	71.2	92.1	NR	NR	NR	92.1	76.8
Morocco	52.3	56.6	75.1	78.1	NR	77.5	82.7	36.2	70.1	70.1	71.2	67.0
Nigeria	49.4	36.2	45.0	11.4	NR	68.4	NR	18.0	18.0	18.0	NR	33.0
Pakistan	17.1	56.6	24.7	47.9	NR	53.2	50.8	18.5	28.7	28.7	58.9	38.5
Peru	84.3	100.0	73.8	78.1	100.0	82.3	89.0	92.1	92.1	92.1	81.6	87.7
Philippines	69.7	56.6	35.3	56.6	NR	82.9	76.2	58.9	74.3	66.7	100.0	67.7
Romania	NR	NR	NR	NR	NR	56.4	0.0	NR	NR	NR	41.4	32.6
Russia	28.7	18.0	23.4	18.0	NR	63.5	0.0	18.0	11.4	11.4	18.0	21.0
Saudi Arabia	65.5	48.7	65.0	37.0	0.0	87.5	92.1	4.5	78.1	78.1	92.1	59.0
South Korea	81.1	92.1	84.7	92.1	92.1	74.4	58.9	48.7	100.0	100.0	76.2	81.8
Sudan	4.5	28.7	18.0	56.6	NR	4.5	NR	4.5	28.7	36.2	NR	22.7
Syria	NR	18.0	18.0	18.0	NR	NR	NR	4.5	18.0	18.0	NR	15.8
Taiwan	81.1	82.7	86.0	82.7	82.7	79.2	56.5	92.1	100.0	100.0	82.7	84.1
Thailand	100.0	70.1	51.8	81.6	NR	85.2	84.8	0.0	70.1	47.9	100.0	69.1
Trinidad	NR	92.1	78.1	78.1	92.1	0.0	100.0	78.1	92.1	92.1	89.0	79.2
Turkey	39.2	7.2	30.6	18.0	NR	57.5	0.0	36.2	11.4	11.4	30.3	24.2
Venezuela	25.9	46.7	26.3	37.0	46.7	33.2	36.2	47.9	37.0	37.0	36.2	37.3
Vietnam	81.1	78.1	67.8	78.1	NR	81.8	100.0	36.2	47.9	47.9	100.0	71.9
Yemen	NR	56.6	63.0	56.6	NR	NR	NR	36.2	36.2	36.2	NR	47.4
<b>Weighted average</b>	<b>40.9</b>	<b>26.9</b>	<b>48.0</b>	<b>15.1</b>	<b>26.9</b>	<b>67.3</b>	<b>48.8</b>	<b>40.9</b>	<b>30.4</b>	<b>30.1</b>	<b>55.6</b>	

Figure A-1: Wheat



ALGERIA



Market access

Algeria imports most of its agricultural commodity needs; its rainfall is unreliable. Both the Algerian Office of Grains and private sector companies import grains.

Algerian tariffs and taxes on US grains and oilseeds are generally low, and there are normally no quantitative restrictions. Nominal tariffs are higher (30%) for value added products such as ethanol, refined SBO, and malt. Animal feed inputs such as DDGS and corn gluten feed also have high nominal tariffs but have had those suspended in recent years.

There is a VAT of 17% for most goods but agricultural commodities are generally lower or even exempt; wheat, for instance, is VAT exempt. Occasionally, when domestic production is high, additional taxes are levied to prevent imports. However, currently domestic production cannot meet demand and the government has frequently reduced or suspended import duties and VAT taxes on animal feed and co-products. Corn, DDGS, and SBM recently had their VAT reduced to 7% from September 2014 through December 2015.

There are preferential duties between Algeria and the European Union (EU), as well as with the four other countries of the Arab Maghreb Union. The US faces stiff competition from the EU and countries bordering the Black Sea on price and shipping flexibility.

Algeria has relatively few technical and procedural barriers to importing, though plant health inspections and phytosanitary certificates are routinely required. Corruption remains a

problem, however; Algeria scored a 36 on Transparency International's Corruption Perceptions Index, placing it in the bottom third of the countries reviewed.

### Grain-oilseed situation

Algeria must import two-thirds of its wheat needs. It is the world's seventh-largest grain importer. The government provides price incentives to encourage local wheat producers to produce more wheat. Imports from the US were 108,000 MT in 2014.

Argentina has been the main supplier of corn to Algeria since 2008. In 2013, The US exported a small amount to Algeria after a long absence from the market, but did not export any in 2014.

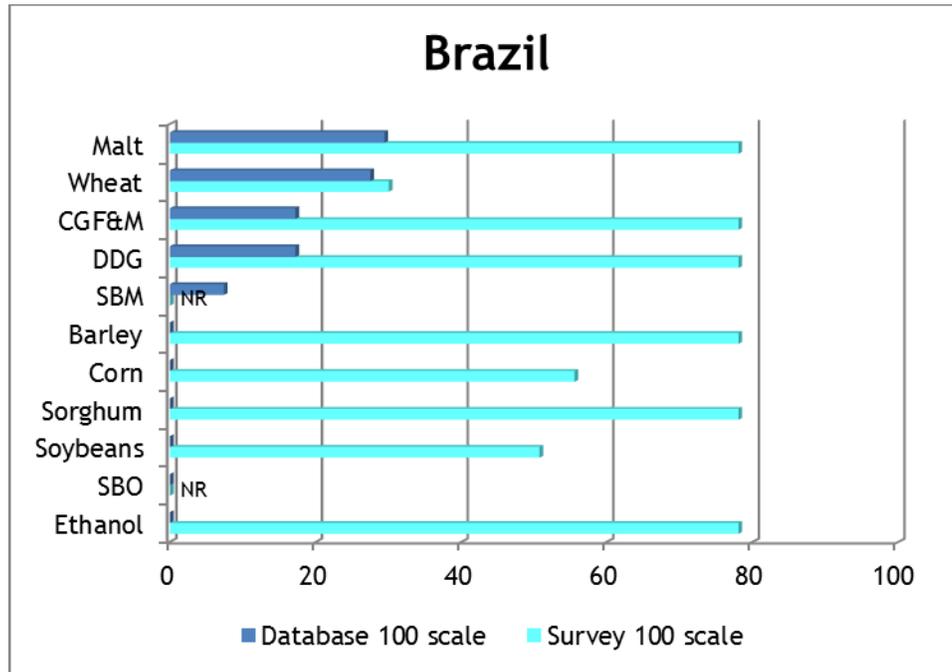
Soybean demand is driven by the poultry feed manufacturing sector. There is no crush capacity in Algeria so it imports all of its soybean meal, 1.4 million metric tons in 2014. As with corn, Argentina is the country's main supplier, with a 90% market share. Algeria has not imported a significant amount of soybean meal from the US since 2009.

Demand for barley by the animal feed sector has increased but domestic production fluctuates. This creates highly variable imports between 300,000 and 600,000 MT per year. Little if any barley comes from the US. The market for DDGS in Algeria is growing rapidly. Demand is expected to increase further since import duties have been eliminated and taxes have been reduced.

<b>Algeria: Wheat (1,000 mt)</b>					
<b>Attribute</b>	<b>2010/2011</b>	<b>2011/2012</b>	<b>2012/2013</b>	<b>2013/2014</b>	<b>2014/2015</b>
Area Harvested (1,000ha)	2,012	2,000	2,000	2,000	1,700
Yield (mt/ha)	1.44	1.4	1.7	1.65	1.12
Beginning Stocks	2,345	3,011	3,357	3,762	4,673
Production	2,900	2,800	3,400	3,302	1,900
MY Imports	6,516	6,500	6,484	7,484	7,100
Total Supply	11,761	12,311	13,241	14,548	13,673
MY Exports	0	4	29	25	25
Feed and Residual	50	50	50	50	50
FSI Consumption	8,700	8,900	9,400	9,800	10,000
Total Consumption	8,750	8,950	9,450	9,850	10,050
Ending Stocks	3,011	3,357	3,762	4,673	3,598

Source: USDA PS&D, 2015

**BRAZIL**



**Market access**

Brazil continues to participate in the Mercosur common market and maintains common external tariffs on feed grains, oilseeds, and byproducts of grains and oilseeds. Tariffs are mostly in the 6-10% range. In 2007, Brazil reinstated stiff Merchant Marine Taxes on bulk grain imports in addition to preferential treatment for domestic producers on taxes and phytosanitary regulations.

In 2014, Brazil announced a duty free wheat quota of 1 million metric tons from June to August 2014, specifically for US/Canadian wheat. This duty free quota mirrored a similar one put in place in 2013. Phytosanitary restrictions limit US wheat exports to red varieties shipped through Gulf of Mexico or Atlantic ports. Non-GMO soybeans and soybean products for human and animal food must contain less than 1% GMO soy. Any products with more than 1% GMO soy must be labeled as such. This requirement is difficult to enforce on domestic production, but it is easily imposed on imports.

In December 2014, Brazil implemented a biodiesel mandate (B7), estimated to require 300,000 MT of soybeans.

**Grain-oilseed situation**

Brazil’s grain and oilseed production has expanded over the past decade. The country is a major US competitor in world markets. Corn production in 2014/15 exceeded the previous record season, 2012/13. Production of soybeans is hitting a new high for 2014/15. The government provides price support to farmers for several grain and oilseed commodities.

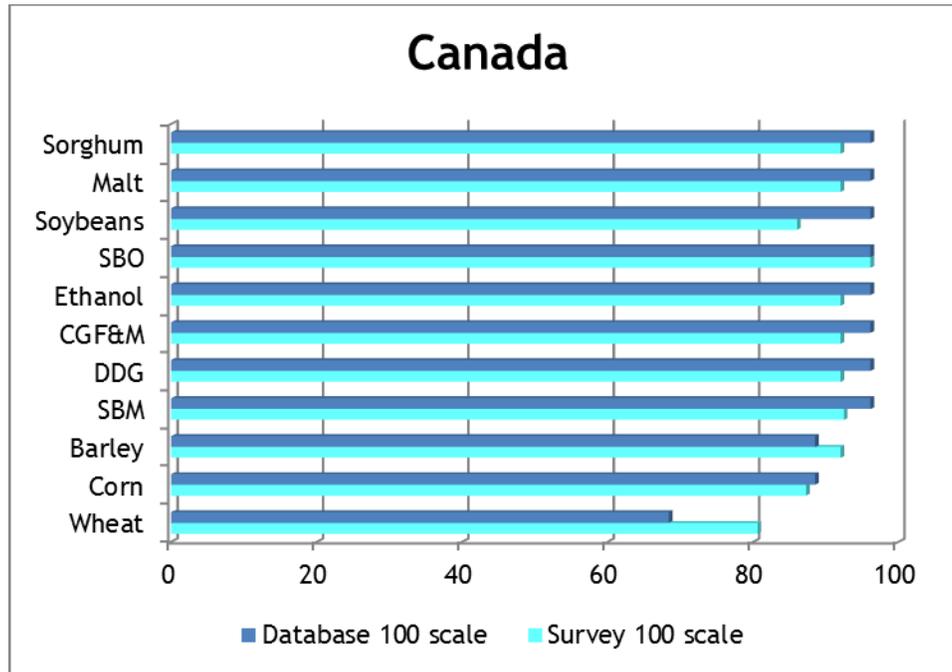
Brazil remains a major wheat importer with net imports of 4.38 MMT in 2013/14.

Acreage for barley is relatively small in Brazil; however, it grew from 88,000 HA in 2010/11 to 105,000 HA in 2014/15, resulting in an increase in production of about 46,000 MT. Almost all of the barley is used by industry. Sorghum acreage and production have declined over the past four years, from 817,000 HA producing 2.3 MMT to an expected 730,000 HA producing 2.0 MMT. Almost all of the sorghum is expected to be included in animal feed.

<b>Brazil: Wheat (1,000 mt)</b>					
<b>Attribute</b>	<b>2010/2011</b>	<b>2011/2012</b>	<b>2012/2013</b>	<b>2013/2014</b>	<b>2014/2015</b>
Area Harvested	2,150	2,170	1,900	2,200	2,730
Yield	2.74	2.67	2.31	2.41	2.16
Beginning Stocks	2,588	1,846	1,748	1,001	1,887
Production	5,900	5,800	4,380	5,300	5,900
MY Imports	6,693	7,338	7,357	7,066	6,700
Total Supply	15,181	14,984	13,485	13,367	14,487
MY Exports	2,535	2,036	1,584	80	1,600
Feed and Residual	200	500	200	600	800
FSI Consumption	10,600	10,700	10,700	10,800	11,000
Total Consumption	10,800	11,200	10,900	11,400	11,800
Ending Stocks	1,846	1,748	1,001	1,887	1,087

Source: USDA PS&D, 2015

CANADA



**Market access**

Canada is the most accessible large regional market for GOMAI commodities, second in size only to Mexico.

The market is largely open. Foreign grain, however, cannot be issued a grade by the Canadian Grain Commission. Consequently, US wheat can only be sold as feed grade or according to a specification and price agreed to by buyer and seller.

**Grain-oilseed situation**

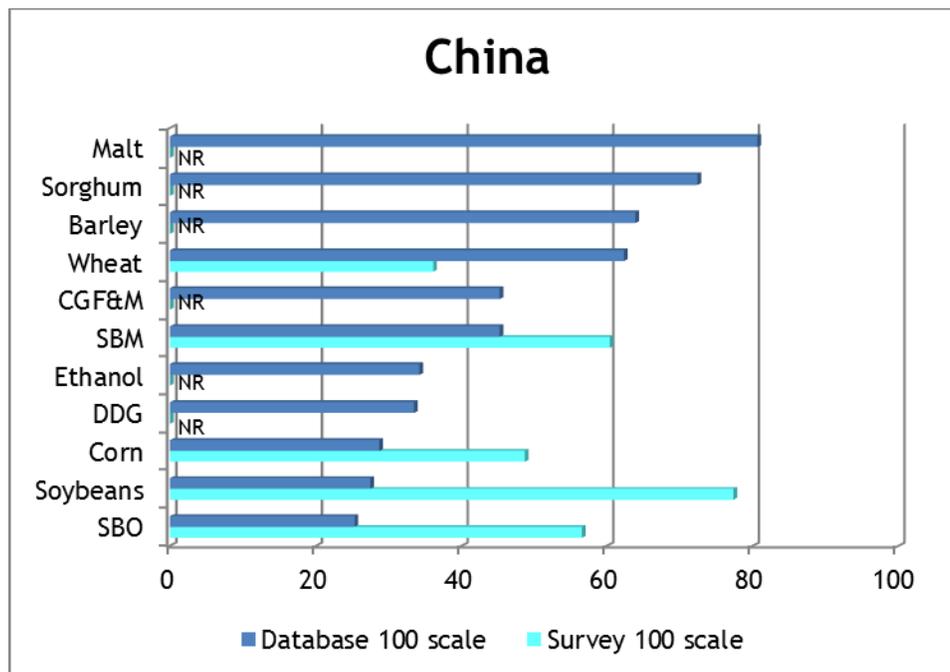
Canada is a major wheat, barley, and canola exporter but imports both corn and soybean meal, mainly from the US. Annual production of corn has fluctuated around 11-14 MMT since 2010. Soybean production has grown from 4.4 MMT in 2010/11 to 6 MMT in 2014/15. For 2013/14, imports of corn, barley, wheat, and soybeans were 500,000 MT, 9,000 MT, 446,000 MT, and 340,000 MT, respectively.

Canola production continues to expand and reached almost 18 MMT in 2013 and 15.6 MMT in 2014. For 2012/13, exports of canola seed, meal, and oil were 7.3 MMT, 3.4 MMT, and 2.5 MMT, respectively.

Canada: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	8,296	8,553	9,497	10,442	9,460
Yield (mt/ha)	2.81	2.96	2.86	3.59	3.1
Beginning Stocks	7,743	7,360	5,932	5,052	9,652
Production	23,300	25,288	27,205	37,530	29,300
MY Imports	443	488	483	446	480
Total Supply	31,486	33,136	33,620	43,028	39,432
MY Exports	16,575	17,352	18,970	23,238	23,500
Feed and Residual	2,701	4,702	4,357	4,930	5,000
FSI Consumption	4,850	5,150	5,241	5,208	5,330
Total Consumption	7,551	9,852	9,598	10,138	10,330
Ending Stocks	7,360	5,932	5,052	9,652	5,602

Source: USDA PS&D, 2015

## CHINA



### Market access

China currently produces about 125 MMT of wheat and imports less than 3% of its needs. There is a 9.6 mmt TRQ for private industry, of which 10% is typically used. The Chinese government (GOC) has a state TRQ, typically used for feed wheat. Out of quota, wheat and corn tariffs were 65% in 2014. In MY 2014/15, wheat imports are estimated to fall to 2 million tons in response to a record harvest. The GOC is expected to tighten over-quota import permits due to high domestic stocks.

The corn TRQ for 2014 was 7.2 MMT, 40% of that is reserved for private enterprises. In 2014, the soybean, SBO, and ethanol tariffs were very high, over 100%. CGF&M, DDGS, and SBM tariffs are 30%. Preferential treatment is given to border countries including Russia, a major grain and oilseed producer. In addition to tariffs, China's VAT (either 13% or 17% depending on the product) does not apply to many domestic or border nation crops, so the VAT has the same effect as an additional tariff.

Additional market barriers include transparency issues, opaque regulatory regimes, import licenses, and SPS measures with questionable scientific bases. The AQSIQ (General Administration of Quality Supervision, Inspection and Quarantine of the People's Republic of China) regularly restricts trade. The AQSIQ requires importers to obtain a Quarantine Inspection Permit (QIP), a cumbersome process, particularly since AQSIQ slows down or even suspends the issuance of QIPs at its discretion.

In 2014, implementation of new biotechnology laws severely disrupted trade in corn, particularly DDGS, with a complete ban for several months due to the presence of unapproved biotech events. The resulting losses cost hundreds of millions of dollars. Although the ban was lifted, importers are concerned about future shipments. In addition, soy exporters are worried that their shipments will be affected in the future due to unapproved traits being detected in shipments. Currently, China does not have a policy for a tolerance level of unapproved events in shipments, nor does current policy allow for “stacked” events. It is reported that Chinese officials recognized these deficiencies and are working toward solutions.

On December 22, 2014, The Chinese National People’s Congress published the Second Draft of its Food Safety Law for public comments. The draft can be found at: [http://www.npc.gov.cn/npc/lfzt/spaqfxd/node\\_25114.htm](http://www.npc.gov.cn/npc/lfzt/spaqfxd/node_25114.htm) . This new law establishes new registration requirements and reinforces the AQSIQ authority to inspect foodstuff imports.

Finally, corruption is a significant problem in China. China scored a 36 out of a possible 100 points (with 100 being the least corrupt) on Transparency International’s Corruption Perceptions Index.

### Grain-oilseed situation

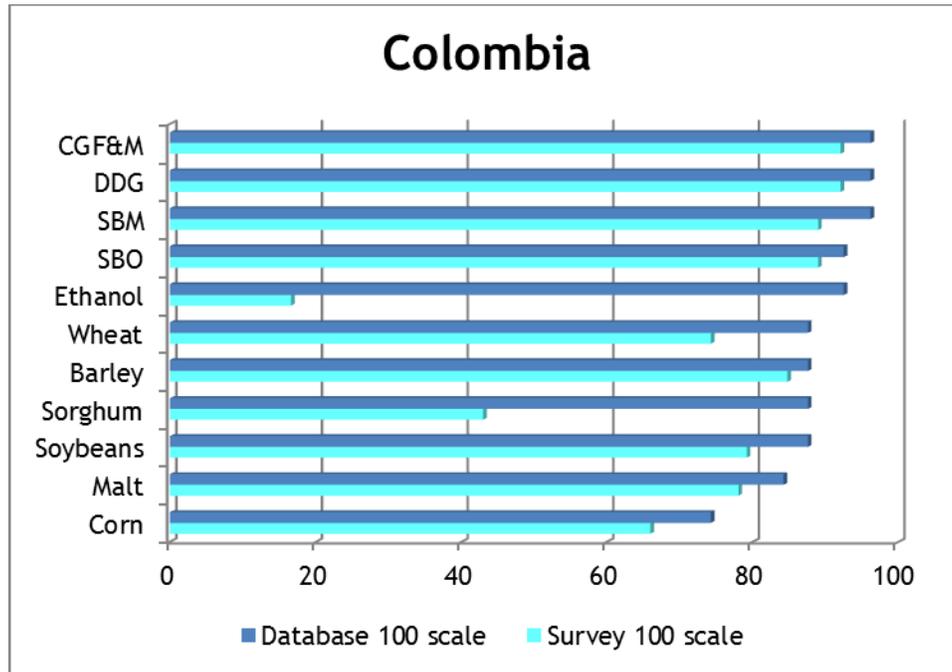
As a matter of basic food security policy, China has reiterated its dedication to pursuing wheat and corn self-sufficiency. Wheat and corn production due to policy encouragement have continued to increase over the last five years. As affluence spreads and diets improve, grain self-sufficiency is becoming harder and harder to achieve. Moreover, increased grain production comes at the expense of oilseed self-sufficiency. Grain trade is still discouraged, even though imported wheat is putting downward pressure on domestic prices and squeezing profit margins for farmers. Because of the downward pressure on prices, it makes economic sense to import wheat instead of transporting the grain internally from surplus to deficit areas.

Increased demand for animal proteins has resulted in corn supplies being tight, as demand for feed corn has risen. This in turn has resulted in more feed quality wheat, soybean meal, and DDGS being used in feed formulas. However, domestic soy production is physically and politically limited, so China relies heavily on imports to feed its animals, absorbing an incredible 65% of the world’s soybean exports in 2014.

China: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	24,257	24,270	24,268	24,117	24,100
Yield (mt/ha)	4.75	4.84	4.99	5.06	5.23
Beginning Stocks	54,425	59,091	55,946	53,960	60,274
Production	115,180	117,400	121,023	121,930	126,000
MY Imports	927	2,933	2,960	6,773	1,500
Total Supply	170,532	179,424	179,929	182,663	187,774
MY Exports	941	978	969	889	1,000
Feed and Residual	13,000	24,000	25,000	21,000	23,000
FSI Consumption	97,500	98,500	100,000	100,500	101,000
Total Consumption	110,500	122,500	125,000	121,500	124,000
Ending Stocks	59,091	55,946	53,960	60,274	62,774

Source: USDA PS&D, 2015

COLOMBIA



Market access

Colombia is a significant market for grain and oilseed products, and with the signing of the US-Colombia Trade Promotion Agreement (CTPA), the market became more open for US products. Tariffs on many products were reduced to 0%. Corn, sorghum, animal feeds, and soybean oil all have duty-free TRQs that grow each year. Fill rates for the quotas have been increasing; the 2.3 million MT corn quota was completely filled in 2014. The out-of quota tariff for corn will be phased out over the next decade.

Until the agreement was signed, imports from other Andean countries were not subject to the Andean Price Band System (APBS) levies, and other regional suppliers had a discount off APBS tariffs, giving their products an additional advantage over US exports. The new FTA prevents regional suppliers from getting a better rate than the US through APBS. The FTA states that if the APBS duty is lower than the FTA duty, the US can export at the APBS duty.

Wheat, barley, corn, sorghum, and soybeans require Import Permits and Phytosanitary Certificates, while CGF&M, DDGS, and soybean meal imports are unrestricted. Corruption is still a problem in Colombia: it scored a 37 out of a possible 100 points (with 100 being the least corrupt) on Transparency International's Corruption Perceptions Index.

Grain-oilseed situation

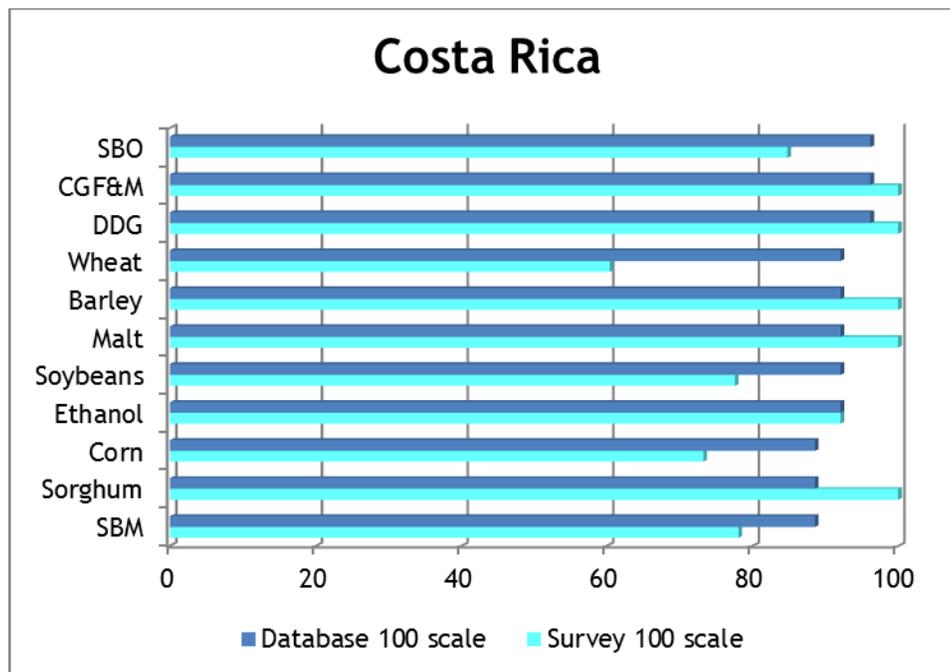
Colombia has become an even more important US trading partner following the approval of the US-Colombia Trade Promotion Agreement. However, the US is just one of several suppliers to

the market, which is competitive. Colombia is a net importer of corn and buys virtually all of its wheat and most of its soybeans and barley from abroad. Imports of these crops have risen over the last four years. Imports of sorghum have dropped sharply over the past two years, by contrast more than halving total supply. Sorghum is used in animal feed.

Colombia: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	12	12	11	8	7
Yield (mt/ha)	1.67	1.92	2	1.88	2.14
Beginning Stocks	239	309	375	423	530
Production	20	23	22	15	15
MY Imports	1,479	1,525	1,507	1,734	1,550
Total Supply	1,738	1,857	1,904	2,172	2,095
MY Exports	4	2	1	17	15
Feed and Residual	75	90	60	125	125
FSI Consumption	1,350	1,390	1,420	1,500	1,565
Total Consumption	1,425	1,480	1,480	1,625	1,690
Ending Stocks	309	375	423	530	390

Source: USDA PS&D, 2015

## COSTA RICA



### Market access

Costa Rica has very few barriers to US imports; however, there have been minor changes to the tariffs imposed on US goods. The US-Central America Free Trade Agreement (CAFTA) was signed into law in August 2005 (and went into force in Costa Rica in 2009). The tariffs faced by US wheat, yellow corn, soybeans, and DDGS remain zero. The rate for crude SBO is 5% and for refined SBO, 14%. SBM faces a 6% tariff (in-quota). Additionally, sorghum has a tariff rate of 6%.

The primary remaining barriers are technical/procedural (e.g., a reportedly cumbersome and lengthy procedure for obtaining standard phytosanitary documentation).

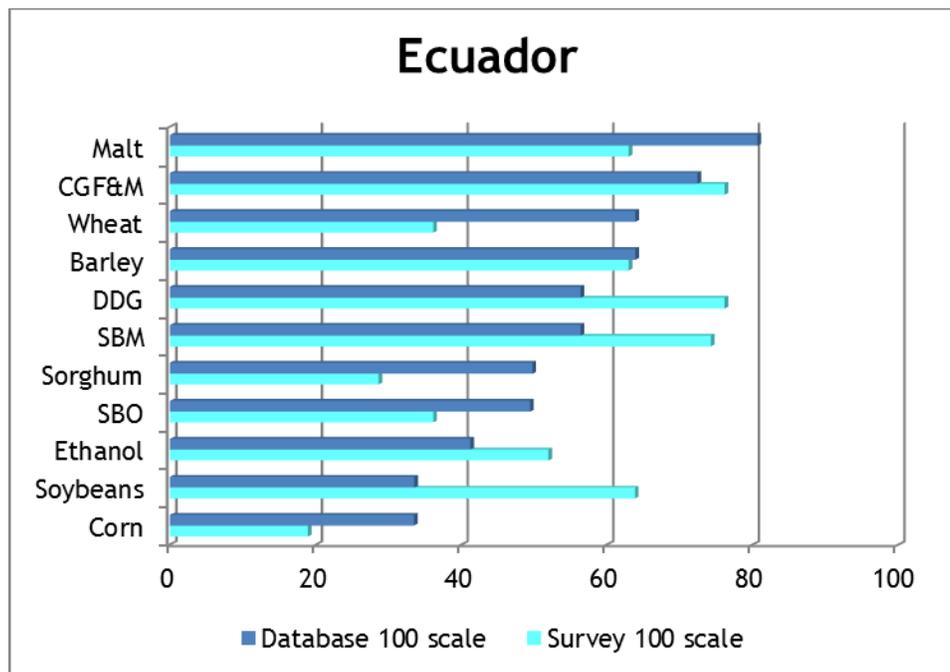
### Grain-oilseed situation

Costa Rica is not a significant commodity producer, so it is heavily dependent on imports of basic grains and oilseeds, almost all of which it sources from the United States.

Costa Rica: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Beginning Stocks	44	88	98	92	70
MY Imports	282	244	250	238	250
Total Supply	326	332	348	330	320
MY Exports	43	39	46	50	40
FSI Consumption	195	195	210	210	215
Total Consumption	195	195	210	210	215
Ending Stocks	88	98	92	70	65

Source: USDA PS&D, 2015

## ECUADOR



### Market access

Ecuador is a member of the Andean Community (CAN) and applies the common tariff rates (0% to 20% for most of the commodities under review in the GOMAI). These rates are adjusted, based on world prices, according to the Andean Price Band System (APBS), which increases tariffs when world prices drop below a threshold value, and lowers tariffs when world prices are high.

As a CAN member, Ecuador maintains preferential treatment for Uruguay, Paraguay, Argentina, and Brazil, in the form of percentage discounts off the base rate plus APBS adjustment. Preferential treatment is applied to all of the products under review.

Wheat imports from the United States are nominally subject to a 10 percent duty; through December 2014, however, the duty had been suspended. Imports from the US remain subject to the APBS variable levy.

Corruption can be a problem in Ecuador, with the country scoring only 33 out of 100 on Transparency International's Corruption Perceptions Index. Prior authorization is required to import grains and oilseeds. In addition, anti-GMO legislation is on the books but remains unenforced.

### Grain-oilseed situation

Ecuador is neither a major producer nor importer of most grains and oilseeds. It typically imports close to half a million tons of wheat. This was also the true for corn until a couple of

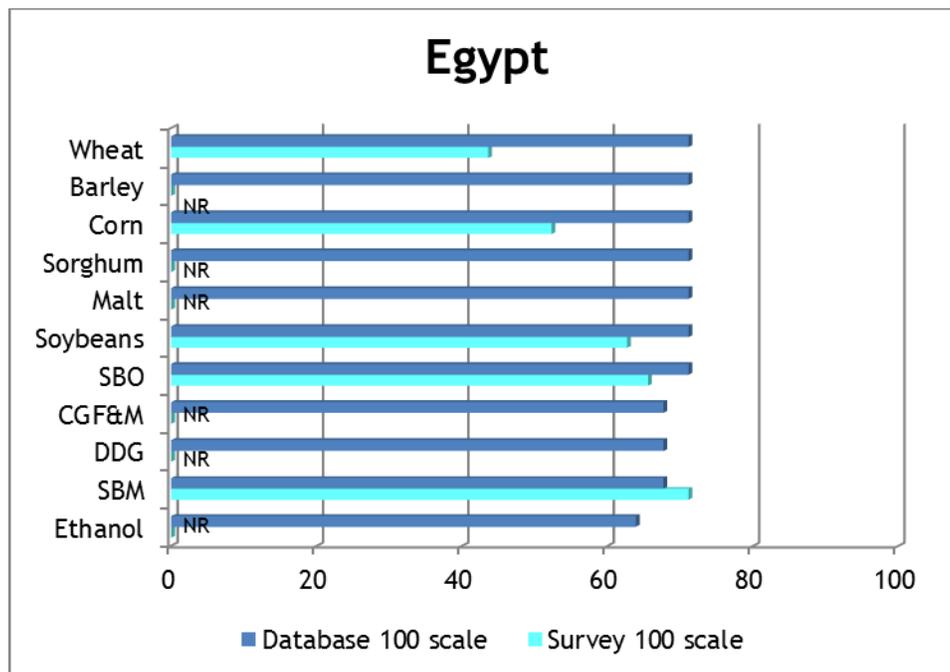
years ago; since then, imports have dropped sharply to under 150,000 MT, in response to policies encouraging domestic production.

Ecuador produces and imports only small volumes of soybeans, though it does import SBM in larger volumes: imports grew to 700,000 MT in 2014. Ecuador imports approximately 30,000 MT of barley and 25,000 MT of sorghum per year, which account for over half of the country's needs for each commodity.

Ecuador: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	9	6	9	8	7
Yield (mt/ha)	0.89	1	0.78	0.75	0.86
Beginning Stocks	98	113	24	87	101
Production	8	6	7	6	6
MY Imports	572	490	646	616	750
Total Supply	678	609	677	709	857
MY Exports	0	0	0	3	5
Feed and Residual	75	95	95	105	135
FSI Consumption	490	490	495	500	575
Total Consumption	565	585	590	605	710
Ending Stocks	113	24	87	101	142

Source: USDA PS&D, 2015

## EGYPT



### Market access

Among the world's largest grain importers, Egypt is second only to Japan. It imports more than half its wheat, almost half its corn, and almost all its soybeans. Due to preferential US treatment, most US agricultural commodities enter duty free. However, there is a tax of 10% on wheat, barley, corn, sorghum, and soybeans to encourage domestic production. Duties on other commodities are usually very low, with 2% tariffs on crude SBO, CGFM, and DDGs, and a 5% tariff on soybean meal. Egypt generally purchases grains based on price and quality assessments.

Testing procedures remain opaque and unevenly applied. The Government of Egypt requires six inspectors to inspect wheat in the exporting country, even though the wheat will be re-inspected at the port of entry. Special measures are in place for wheat by the General Authority for Supply Commodities (GASC) which requires imports of wheat to also be pre-inspected by an Egyptian Government agency prior to export.

The Egyptian Government requires imported corn, soybean, wheat, rice, soymeal, and DDGs to be pre-inspected. Other SPS measures continue to be non-transparent and burdensome. Import permits and phytosanitary certificates are required for all commodities covered in this study. In the past, Egypt has adopted policies that are impossible for exporters to meet, e.g., in April 2010 a zero tolerance policy was imposed on Ambrosia seeds in wheat. Egypt's Central Administration for Plant Quarantine removed the requirement for the US, but not for wheat from other origins.

Corruption also remains a problem in Egypt. In 2014, it received a score of 37 on Transparency International's Corruption Perceptions Index.

### Grain-oilseed situation

In July 2014, the Egyptian government reformed its food subsidy program and began a pilot to reform the baladi bread program in an effort to cut costs and reduce black market trafficking. The new, more market friendly approach eliminated price subsidies for cooking oils, including soy oil, and for wheat flour. USDA FAS believes that wheat imports will likely fall a bit in response to the new program. Oil imports are projected to increase to 552,000 MT for 2015/16 compared to 530,000 MT in 2014/15. The Holding Company for Food Industries is now the sole government entity responsible for crude oil imports.

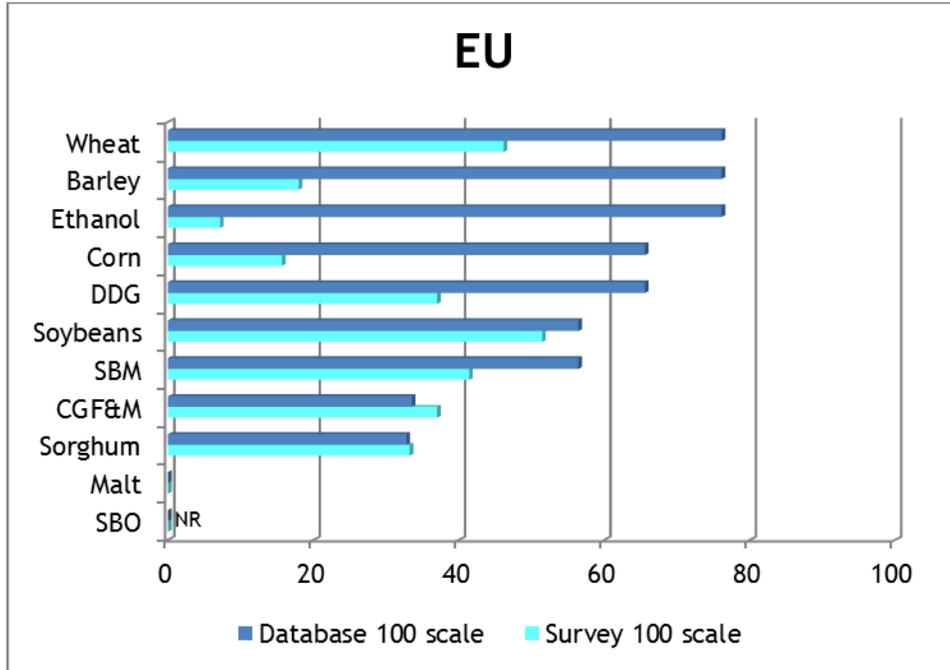
The US import share of both wheat and corn is relatively low: for 2013/14, the US supplied none of the 10.5 MMT of wheat and only 655,000 MT of the 6.3 MMT of corn imported by Egypt.

In the oilseed complex, domestic production of soybeans is negligible. Egypt's consumption of soybean meal has expanded in recent years as the country has built up its crushing capacity. Egypt imported about 1.1 MMT of soybeans in 2014/15; Argentina and the US are the major suppliers. Soy oil is now included in the food subsidy program and local retailers have been promoting the health benefits of soy oil. Consumers are responding by increasing demand: Egypt imported 280,000 MT of soy oil in 2014/15.

Egypt: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	1,260	1,280	1,350	1,350	1,350
Yield (mt/ha)	5.71	6.56	6.3	6.11	6.15
Beginning Stocks	5,605	5,480	6,698	4,601	4,312
Production	7,200	8,400	8,500	8,250	8,300
MY Imports	10,600	11,650	8,300	10,170	10,700
Total Supply	23,405	25,530	23,498	23,021	23,312
MY Exports	225	232	197	209	250
Feed and Residual	2,200	2,600	2,200	2,000	1,800
FSI Consumption	15,500	16,000	16,500	16,500	17,100
Total Consumption	17,700	18,600	18,700	18,500	18,900
Ending Stocks	5,480	6,698	4,601	4,312	4,162

Source: USDA PS&D, 2015

EU-28



Market access

Though durum, high quality soft wheat, corn, sorghum, and soybeans are all duty free, the EU has strict price and quantity barriers in place for other grains and oilseeds. Most price barriers are in the form of duties based on volume. For some products, there are TRQs within which duties are lower. The EU restricts the import of low priced grains from non-EU members with import duties and quotas.

The EU has strict SPS criteria managed by the industry. The strongest barrier is the EU limitation on GM commodities, both for import and cultivation. There is a backlog of applications for GMO trait approvals. This backlog is effectively blocking US exports of GM crops. The EU has only approved a few biotech events with the approval process usually taking several years.

The EU is dependent on corn and soybean imports for its feed ingredients, so the EU policy on imports of GM products is less restrictive than that on GM crops. Imports of SBM and DDGS have been growing.

Corruption is not generally a concern in the EU, except for some of the newer member countries and even then, it is less of a concern than in many other export markets around the world.

### Grain-oilseed situation

Overall grain production in 2014/15 is expected to exceed internal demand, despite the EU's second largest wheat crop on record. Imports of wheat are projected at 5.5 MMT in 2014/15. Corn imports are expected to rise to an estimated 8 MMT in 2014/15. High demand, and prices, for wheat in EU export markets has made corn a competitive feed ingredient.

The US once supplied significant volumes of sorghum to the EU, but those volumes have since dropped. Although tight feed wheat supplies means there may be interest in using sorghum as an alternative, FAS expects sorghum imports to remain low.

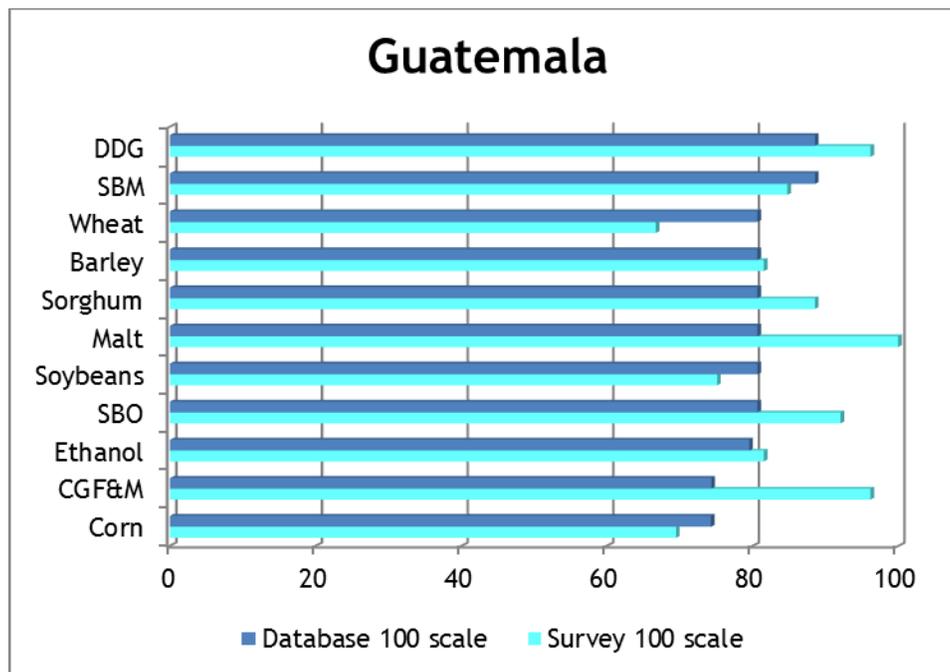
The primary category of GM products consumed in the EU is soybean meal, and demand is higher than ever: roughly 30 MMT is consumed each year. Brazil supplies between 40-50% of this total, the US supplies 20-30%, and Paraguay and Canada supply the rest. The second largest category is DDGS, which has experienced explosive growth. The US has been the leading supplier.

Barley production has contracted and currently, production is about 60 MMT. Usually, the EU imports very limited quantities of barley, and it is mainly is used for animal feed. However, the tight feed wheat supplies will lead to greater barley imports.

European Union: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	26,016	25,831	25,967	25,879	26,725
Yield (mt/ha)	5.25	5.35	5.16	5.58	5.85
Beginning Stocks	16,576	11,934	13,516	10,815	9,984
Production	136,667	138,182	133,949	144,328	156,448
MY Imports	4,621	7,362	5,277	3,974	5,500
Total Supply	157,864	157,478	152,742	159,117	171,932
MY Exports	23,086	16,728	22,677	32,033	33,500
Feed and Residual	52,519	57,500	51,000	49,500	54,500
FSI Consumption	70,325	69,734	68,250	67,600	68,600
Total Consumption	122,844	127,234	119,250	117,100	123,100
Ending Stocks	11,934	13,516	10,815	9,984	15,332

Source: USDA PS&D, 2015

## GUATEMALA



### Market access

Guatemala is one of the five Central American nations that have ratified the Dominican Republic-Central America Free Trade Agreement with the United States. It was ratified and implemented by the United States on June 30, 2005, and went into full force with Guatemala on July 1, 2006. Under the agreement, tariffs and non-tariff barriers on a variety of products have been either eliminated, or in some cases will be gradually eliminated over a 15 to 20 year period. For most products, the tariff faced by US exports is 0%, other than out-of-quota yellow/white corn (3.5%), and refined soybean oil (6%).

The time and expense for imports have been dramatically reduced following the implementation of DR-CAFTA. Tariffs and quantity restrictions have been removed or remain low; in some cases, due to ongoing phase-outs, tariffs have dropped since the last GOMAI.

Price and quantity restrictions for sensitive products such as white corn remain high, but are scheduled to be phased out over time. Phytosanitary certificates and import permits remain an issue. In addition, corruption can be a problem: Guatemala's score on Transparency International's Corruption Perceptions Index was 32 in 2014.

### Grain-oilseed situation

Guatemala does not produce a significant amount of wheat or soybeans. The country relies primarily on the US for its import needs. It does not have significant soybean crushing capacity and therefore imports soybean meal and oil. Corn production was 1.7 MMT in 2013/14,

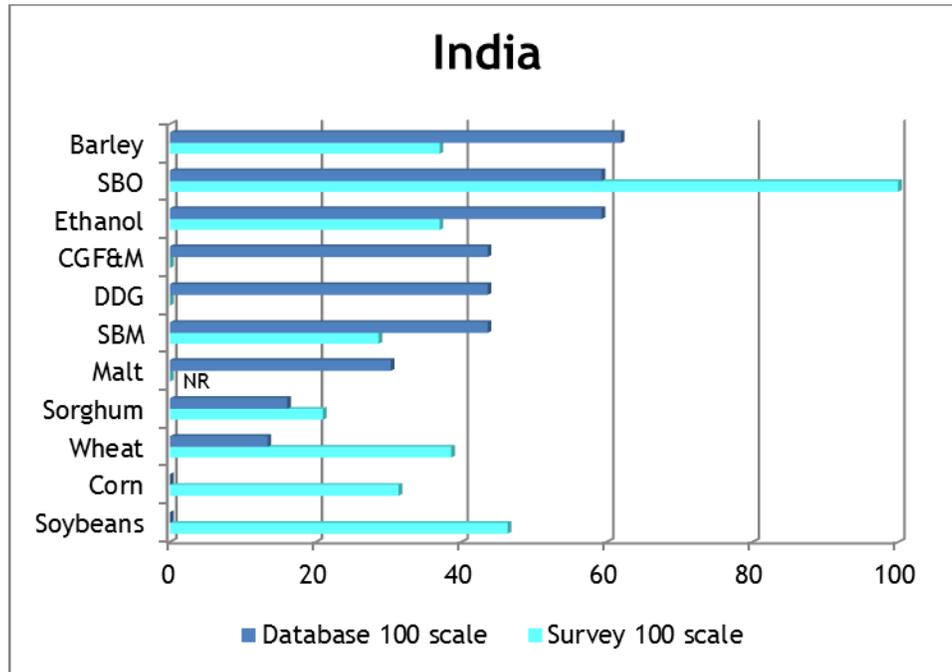
primarily white corn. Corn imports have been approximately 700,000 MT annually over the past four years, most of which comes in under a duty-free quota.

Guatemala is projected to produce 45,000 MT of sorghum in 2013/14, using 40,000 MT for animal feed and 5,000 MT for industrial purposes.

Guatemala: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	1	1	1	1	1
Yield (mt/ha)	1	1	1	1	1
Beginning Stocks	127	133	113	101	111
Production	1	1	1	1	1
MY Imports	571	534	566	613	600
Total Supply	699	668	680	715	712
MY Exports	41	40	39	39	35
Feed and Residual	40	40	40	40	40
FSI Consumption	485	475	500	525	535
Total Consumption	525	515	540	565	575
Ending Stocks	133	113	101	111	102

Source: USDA PS&D, 2015

INDIA



Market access

India maintains its reputation for being one of the most difficult markets for US grain exporters to penetrate. With minor exceptions, the country effectively blocks imports of wheat, corn, soybeans, and sorghum. Barley imports are relatively unimpeded.

The majority of products face tariffs from 30%-50%, although soybean oil has faced lower rates as the government has moved to satisfy strong domestic demand and the wheat import duty is zero. Nevertheless, tariffs are compounded by taxes levied by the city, state, and central authorities, with total impacts much higher than the effective applied rate. Also, India has previously raised tariff rates to WTO bound levels (as high as 100%) in order to manage prices and supply.

India has a 500,000 MT TRQ for corn, for which the duty is 15%, though the TRQ procedures are onerous and restrictive. Outside of the quota, the duty is 50%. In 2012, soybean oil tariffs were raised sharply to 45%. By the end of 2014, however, they had been reduced to 7.5% on crude SBO and 15% on refined SBO.

Many non-tariff barriers also exist. SPS requirements are particularly restrictive. India wheat tenders frequently include SPS requirements that the US cannot certify. In addition, tender specifications remain all but impossible to meet because of prohibitive wheat disease requirements and unnecessary fumigation requirements. India's SPS requirements have kept US wheat imports out of the country.

To these SPS restrictions can be added opaque customs procedures and import licensing - i.e., the requirement to obtain prior approval from India's Genetic Engineering Approval Committee and mandatory labeling to import genetically modified goods. The government specifies technical requirements on all grains but applies them to exclude specific commodities. In addition, documentation procedures frequently are met with delays.

Corruption remains an issue, as India scored a 38 out of a possible 100 points (with 100 being the least corrupt) on Transparency International's Corruption Perceptions Index.

### Grain-oilseed situation

India is a sizeable producer of wheat, corn, and soybeans, in any given year producing approximately 90 MMT, 21 MMT, and 10 MMT of each crop, respectively. The country effectively blocks imports of these three commodities, with very small exceptions.

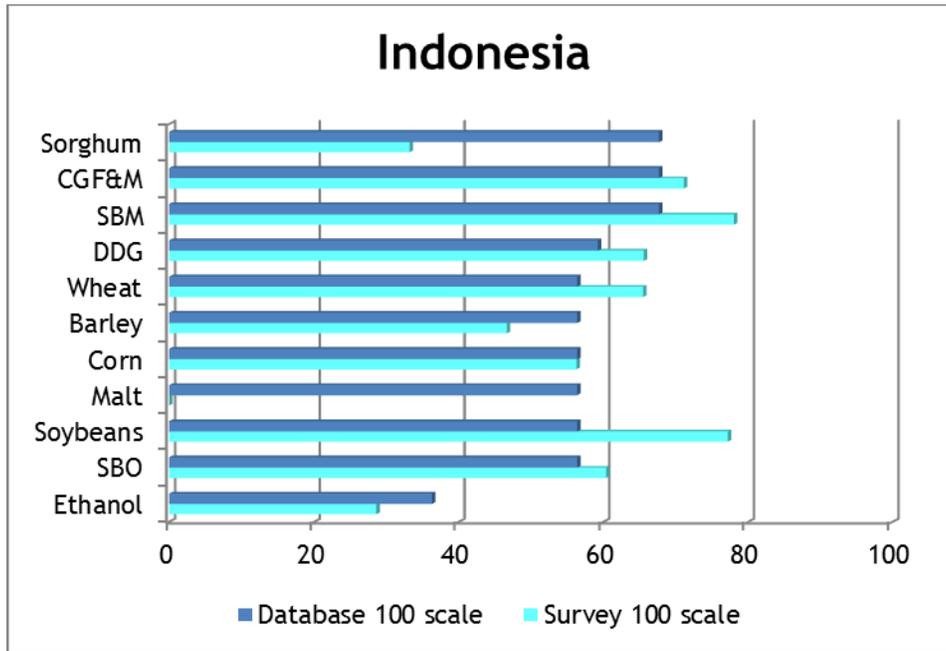
Demand for imported oils exceeds domestic production, however. Most imports are of palm oil, though India does import approximately 1 MMT of soybean oil per year. The country also exports excess soybean meal, an estimated 4 MMT in 2013. SBM exports are decreasing, however, due to growing internal demand for feed.

In the name of food security, the Indian government allows for the stockpiling of food grains through extensive government procurement. Much of the stockpile is purchased from Indian farmers. The stock piles are often dumped onto international markets, distorting trade. In addition, a broad range of assistance, including subsidies for inputs, debt forgiveness and minimum support prices distorts the market for which imports seek to compete.

<b>India: Wheat (1,000 mt)</b>					
<b>Attribute</b>	<b>2010/2011</b>	<b>2011/2012</b>	<b>2012/2013</b>	<b>2013/2014</b>	<b>2014/2015</b>
Area Harvested (1,000ha)	28,460	29,070	29,860	30,000	31,530
Yield (mt/ha)	2.84	2.99	3.18	3.12	3.04
Beginning Stocks	16,120	15,360	19,950	24,200	17,830
Production	80,800	86,870	94,880	93,510	95,850
MY Imports	272	15	16	25	45
Total Supply	97,192	102,245	114,846	117,735	113,725
MY Exports	72	891	6,824	6,053	3,500
Feed and Residual	2,900	3,100	3,400	4,800	4,500
FSI Consumption	78,860	78,304	80,422	89,052	89,225
Total Consumption	81,760	81,404	83,822	93,852	93,725
Ending Stocks	15,360	19,950	24,200	17,830	16,500

Source: USDA PS&D, 2015

INDONESIA



**Market access**

Indonesian tariffs are relatively low for GOMAI products: wheat, corn, soybeans, SBO, and DDGS are all 5%. Indonesia has preferential tariffs for ASEAN trading partners. Most products other than corn and DDGS also face a 10% VAT.

The government requires import licenses for grains and oilseeds, as well as phytosanitary certificates. In addition, there are product label requirements, pre-shipment inspection requirements, local content and domestic manufacturing requirements, and quantitative restrictions that impede imports of US products. Restrictions on GM products are not enforced.

A lack of transparency and widespread corruption are significant problems for companies doing business in Indonesia. The country scored a 34 of a possible 100 points (with 100 being the least corrupt) on Transparency International's Corruption Perceptions Index.

**Grain-oilseed situation**

Indonesia imports all its wheat, 7.4 MMT in MY 2013/14. Wheat imports are expected to grow to 7.7 MMT in 2014/15. The US import share is under 10%.

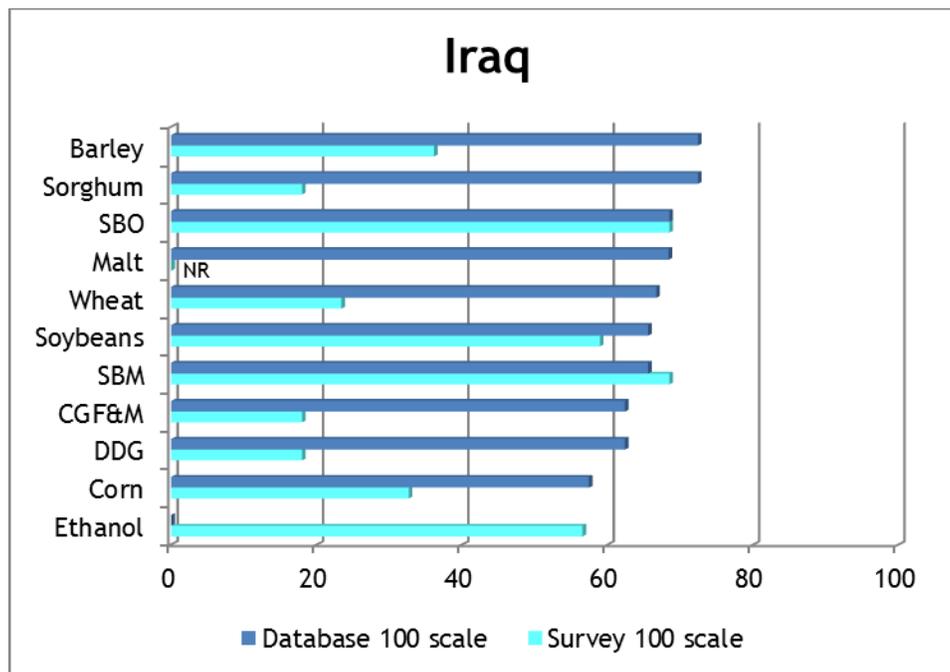
Corn production has also been growing steadily, from 6.9 MMT in 2009/10 to a projected 9.4 MMT in 2014/15. Corn imports are projected at 3.5 MMT for MY 2014/15. Mills prefer US corn due to consistency in specifications and supply. Indonesia has the potential to become a major and consistent importer of US corn, dramatically increasing the US import share from 5%-10% to 20%. However, this increase has not been realized yet.

Indonesia produces only 620,000 MT of soybeans and must import most of its needs. The country is projected to import more than 2.1 MMT in 2013/14, up from 1.2 MMT in 2009/10. The majority of these imports will come from the US.

Indonesia: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Beginning Stocks	1,258	1,615	1,600	1,560	1,387
MY Imports	6,606	6,457	7,146	7,392	7,700
Total Supply	7,864	8,072	8,746	8,952	9,087
MY Exports	214	222	236	300	300
Feed and Residual	135	150	150	165	165
FSI Consumption	5,900	6,100	6,800	7,100	7,400
Total Consumption	6,035	6,250	6,950	7,265	7,565
Ending Stocks	1,615	1,600	1,560	1,387	1,222

Source: USDA PS&D, 2015

## IRAQ



### Market access

Import demand is expected to continue increasing as the nation rebuilds. Iraq continues to operate the state-run Iraqi Grain Board to ration grain to industrial users and households. FAS has reported that the state tender process is “unprofessional”. Wheat, barley, and corn price supports are currently above the world price; as a result, grains are smuggled in from surrounding nations.

Generally, tariff rates are low, in the 5%-10% range. However, market access for grains and oilseeds to Iraq remains limited due to inconsistent application of laws and regulations, corruption, poor infrastructure, limited working capital, and competition from informal markets. Complex feed test processes stop vessel-sized shipments of grain. Seasonal bans on many imports and requirements for sampling prior to arrival further hinder trade. GMOs are banned in Iraq; this currently affects US corn exports only.

Corruption is systemic in Iraq. Transparency International scores the country 16 out of 100 on its Corruption Perceptions Index.

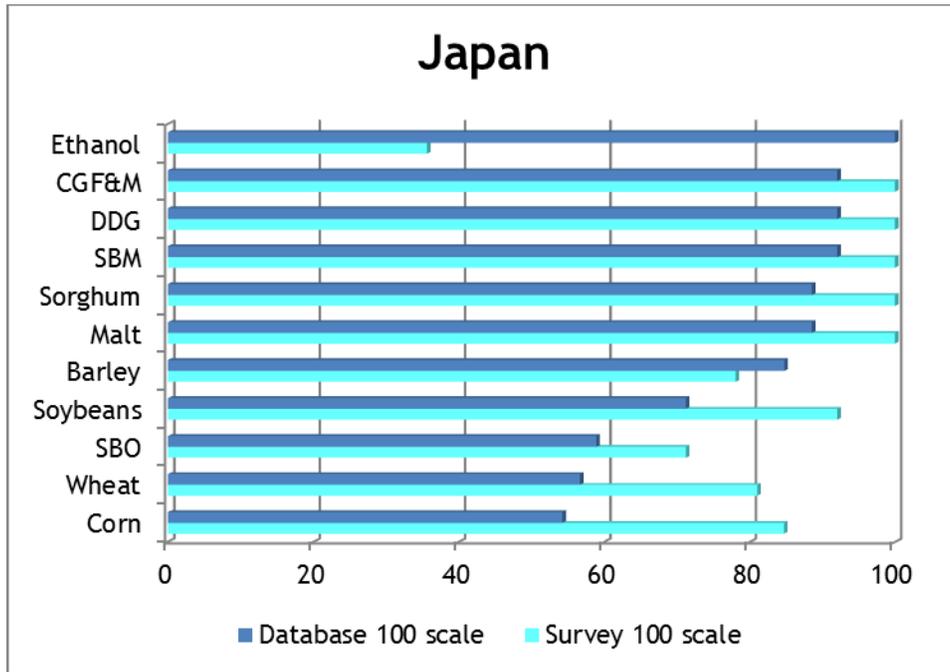
### Grain-oilseed situation

Wheat production for 2013/14 is estimated at 3.3 MMT, an increase of 1.2 MMT from the previous year. Wheat is one of five basic commodities distributed through the Iraqi Public Distribution System (PDS), which keeps wheat imports in the 3-4 MMT range. Corn production and imports are modest; total supply is approximately 300,000 MT per year.

Iraq: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	1,903	1,587	1,539	2,565	2,460
Yield (mt/ha)	1.51	1.62	1.36	1.29	1.42
Beginning Stocks	597	796	795	783	729
Production	2,875	2,574	2,100	3,300	3,500
MY Imports	3,631	3,784	3,948	3,246	2,800
Total Supply	7,103	7,154	6,843	7,329	7,029
Feed and Residual	800	700	375	800	900
FSI Consumption	5,507	5,659	5,685	5,800	5,600
Total Consumption	6,307	6,359	6,060	6,600	6,500
Ending Stocks	796	795	783	729	529

Source: USDA PS&D, 2015

**JAPAN**



**Market access**

Japan is a critical destination for US agricultural exports. State trading is the rule for wheat and the Ministry of Agriculture, Food, and Fisheries controls all imports and maintains significant market access barriers in an effort to support farm prices and incomes. The Japanese government revises the domestic price of wheat twice annually.

Tariff rate quotas for grains remain the government’s major tool for regulating the market. In-quota tariffs for TRQ items are zero, except for soft wheat, which faces a temporary levy of 20%. The US is the key grain and oilseed supplier for Japan.

Japan’s plant quarantine system frequently bans all imported products when the home country imposes a quarantine of any kind (narrow though it may be).

Japan is currently in talks with the US and the rest of the Trans-Pacific Partnership countries to develop a free trade agreement that will open the markets to all members.

**Grain-oilseed situation**

Japan is heavily import-dependent when it comes to grains (other than rice), oilseeds, and oilseed products. Japan is a large and reliable importer of US agricultural commodities and the US usually has a very high market share - typically 80% for corn, 50% for wheat, and 70% for soybeans.

Animal agriculture consumes most of the corn, soybean meal, barley, and sorghum. Japan's feed price subsidy programs have absorbed the increasing feed prices, especially for corn. Soybean meal imports are projected at 2 MMT for 2014/15. Crushing capacity is still diminished from the earthquake and tsunami in March 2011. Most of the barley is imported (1.3 MMT annually in recent years) and all of the sorghum is imported (1 MMT in 2013/14).

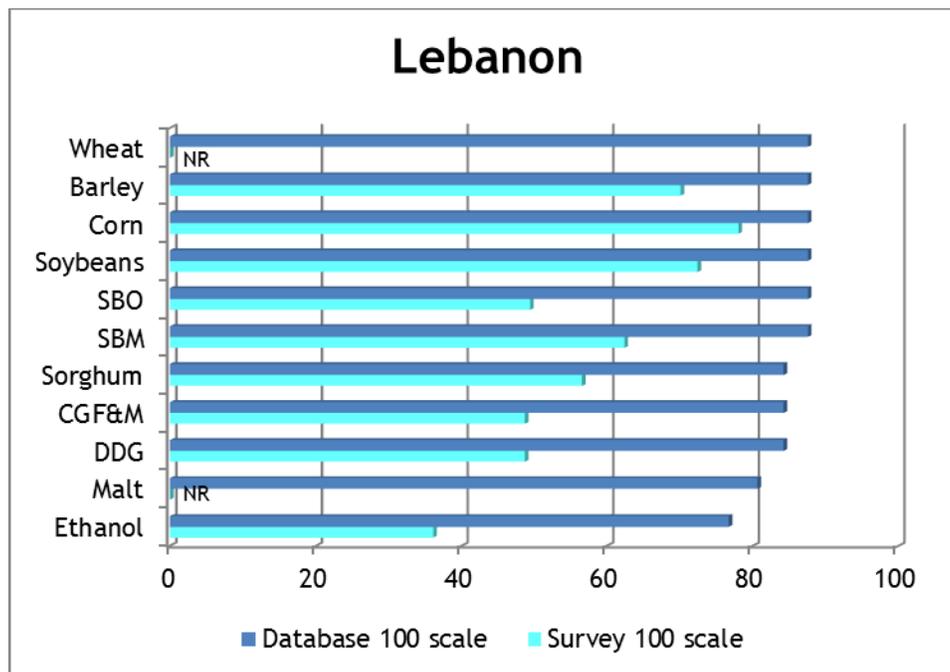
<b>Japan: Wheat (1,000 mt)</b>					
<b>Attribute</b>	<b>2010/2011</b>	<b>2011/2012</b>	<b>2012/2013</b>	<b>2013/2014</b>	<b>2014/2015</b>
Area Harvested (1,000ha)	207	212	209	210	213
Yield (mt/ha)	2.76	3.52	4.11	3.87	3.99
Beginning Stocks	1,310	1,058	1,462	1,543	1,339
Production	571	746	858	812	849
MY Imports	5,869	6,354	6,598	6,123	5,800
Total Supply	7,750	8,158	8,918	8,478	7,988
MY Exports	292	296	275	269	270
Feed and Residual	300	500	1,200	700	400
FSI Consumption	6,100	5,900	5,900	6,170	5,900
Total Consumption	6,400	6,400	7,100	6,870	6,300
Ending Stocks	1,058	1,462	1,543	1,339	1,418

Source: USDA PS&D, 2015

<b>Japan: Sorghum (1,000 mt)</b>					
<b>Attribute</b>	<b>2010/2011</b>	<b>2011/2012</b>	<b>2012/2013</b>	<b>2013/2014</b>	<b>2014/2015</b>
Beginning Stocks	117	75	81	78	81
MY Imports	1,418	1,481	1,897	1,003	1,000
Total Supply	1,535	1,556	1,978	1,081	1,081
Feed and Residual	1,460	1,475	1,900	1,000	1,000
Total Consumption	1,460	1,475	1,900	1,000	1,000
Ending Stocks	75	81	78	81	81

Source: USDA PS&D, 2015

## LEBANON



### Market access

Lebanon has comparatively open markets for agricultural commodities. There are no import quotas on any of the products under review, and there are no import duties on wheat, corn, soybeans, or soybean oil. There are 5% tariffs on soybean meal, DDGS, and corn gluten meal. The 10% VAT on domestic and imported products has been revoked.

Lebanon applied for WTO membership in 1999 and has gone through some of the required steps, but progress slowed after 2009 for reasons unrelated to agricultural trade. The US Agency for International Development is currently providing assistance to the Lebanese government in advancing the process.

Technical and procedural barriers to trade appear to be modest. However, corruption is a significant issue in Lebanon. Bribes for import purposes are illegal but are a real problem. Lebanon scores a 27 of a possible 100 points on Transparency International's Corruption Perceptions Index.

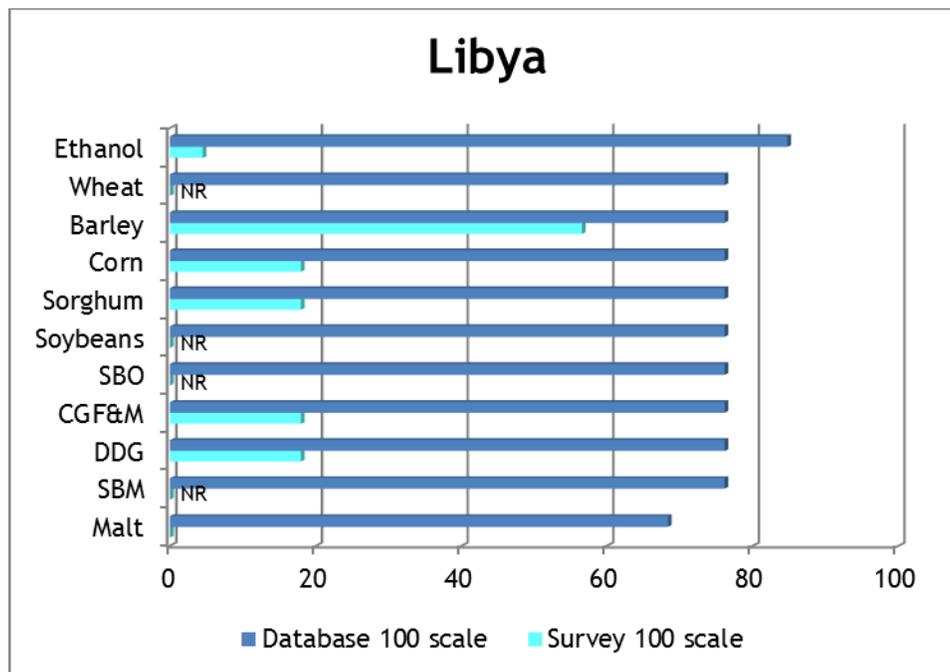
### Grain-oilseed situation

Lebanon has significant demand for wheat, corn, and soybean meal imports. Corn, soybean meal, and small quantities of soybean oil are imported from the US. Lebanon does not produce any significant quantity of corn, so it is virtually all imported (350,000-600,000 MT per year), with 50% typically coming from the US. Imports of wheat average about 500,000 MT and are mostly Black Sea or EU origin due to the geographic proximity of those suppliers.

Lebanon: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	30	35	38	50	50
Yield (mt/ha)	2.77	3.57	3.95	2.8	2.8
Production	83	125	150	140	140
MY Imports	401	500	548	579	600
Total Supply	484	625	698	719	740
MY Exports	0	25	0	0	0
FSI Consumption	484	600	698	719	740

Source: USDA PS&D, 2015

## LIBYA



### Market access

The aftermath from the 2011 uprising in Libya created new obstacles for exporters looking to do business there, among them infrastructure damage, the disruption of commercial relationships, and foreign asset, foreign exchange, and banking challenges.

Following the turmoil, Libya also imposed a 4-10% service charge on all imported goods. For food imports requiring health clearance there is an estimated waiting time of ten days before final clearance is granted. The required documents for clearing customs are the original bills of lading, copies of all invoices, health certificates, packing list, and certificate of origin. Since Libya is not yet a member of the WTO it is not party to the key agreements, including the Sanitary and Phytosanitary Measures (SPS) and Technical Barriers to Trade (TBT) Agreements, which would otherwise limit these types of import restrictions.

Corruption has historically been a major problem in Libya. Libya's score is among the lowest in the world at 18 of a possible 100 points on Transparency International's corruption index.

### Grain-oilseed situation

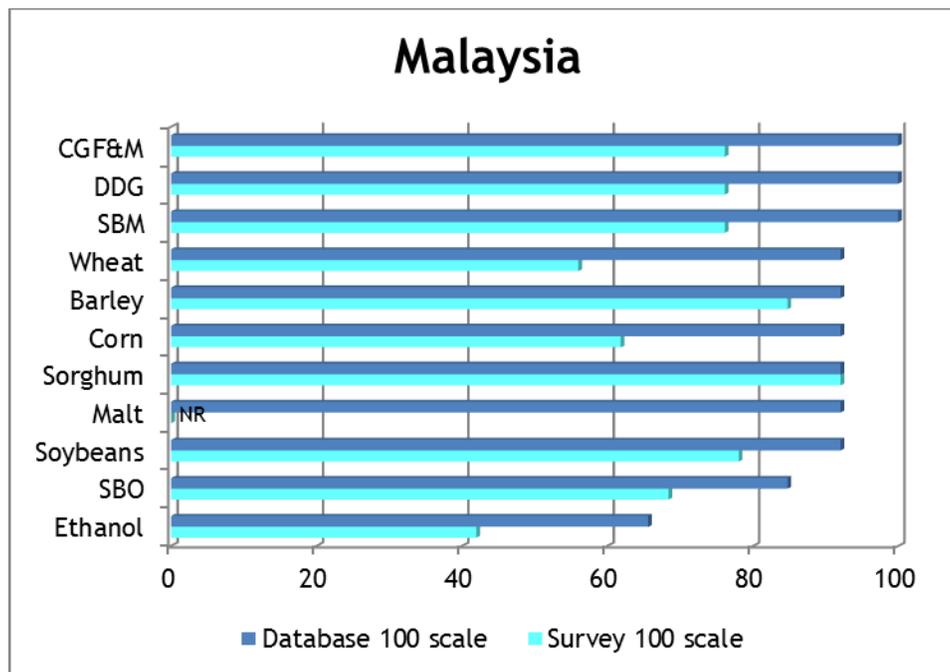
Climatic conditions and poor soils severely limit Libya's agricultural output. Libya's arable land is just 1% of the total area due to water limitations. Libya's primary agricultural water source remains the Great Manmade River Project. The country imports about three-quarters of its food.

Libya has significant demand for wheat, corn, and soybean meal. Libya is projected to import 1.7 MMT of wheat and about 700,000 MT of corn in 2014/15. The US is not a regular exporter of wheat to Libya.

Libya: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	135	150	165	165	165
Yield (mt/ha)	0.79	1.11	1.21	1.21	1.21
Beginning Stocks	300	200	200	200	200
Production	106	166	200	200	200
MY Imports	1,474	1,561	1,946	2,049	1,650
Total Supply	1,880	1,927	2,346	2,449	2,050
FSI Consumption	1,680	1,727	2,146	2,249	1,950
Total Consumption	1,680	1,727	2,146	2,249	1,950
Ending Stocks	200	200	200	200	100

Source: USDA PS&D, 2015

## MALAYSIA



### Market access

Malaysia produces no wheat or soybeans and very little corn. Consequently, it meets its needs through imports and has few price barriers: GOMAI products are duty free, except for a 5% tariff on soybean oil.

In November 2010, Malaysia began enforcing mandatory labeling of food and food ingredients obtained through modern biotechnology, a consequence of the Biosafety Act of 2007. The biotech-labeling requirement went into effect in 2014.

Malaysia implemented a goods and services tax (GST) in April 2015, which is expected to dampen future demand for corn and wheat imports.

### Grain-oilseed situation

Malaysia is the world's second largest palm oil producer, but relies on imports for its wheat, soybeans, and most of its corn. Annual imports of the three commodities were 1.7, 0.6, and 3.4 MMT, respectively, in 2013/14. Corn imports are also expected to grow as the livestock sector expands to meet consumer demand for pork and poultry.

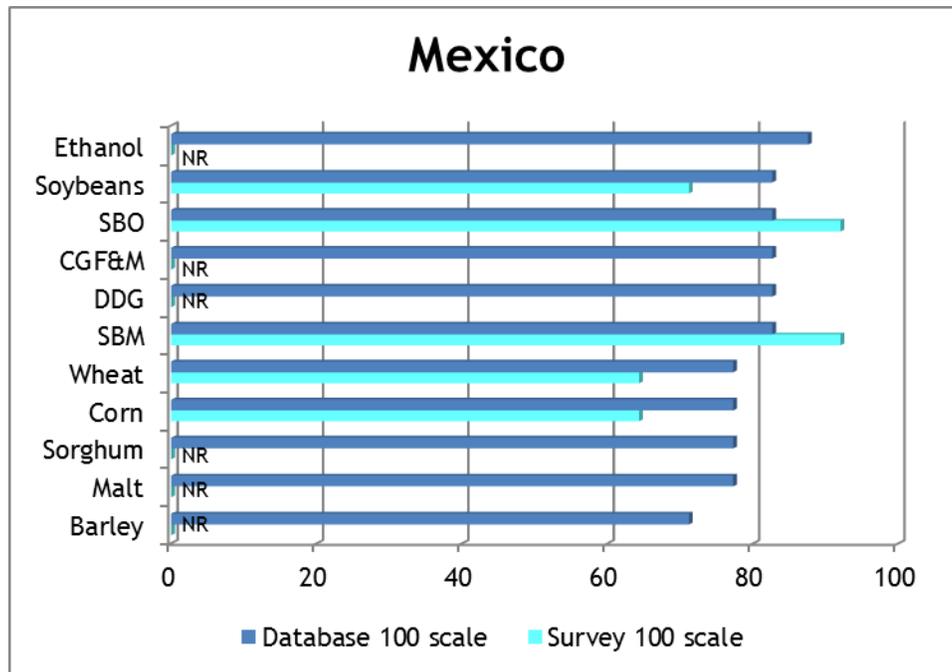
Australia is Malaysia's largest wheat supplier; Argentina and Brazil are the largest suppliers of corn. The US supplied 233,000 MT of wheat to Malaysia in 2013/14, but only 10,000 MT of corn. US exports of DDGS and corn gluten meal to Malaysia in 2014 were 46,000 MT and 36,000 MT respectively. The US also supplied over half of Malaysia's 333,000 MT of soybean imports in 2013/14.

Some expect a trend toward decreased soybean imports, as feed producers increase their direct imports of soymeal. Argentina has a freight advantage and is the dominant supplier of soymeal to the Malaysian market.

Malaysia: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Beginning Stocks	318	395	441	337	393
MY Imports	1,574	1,524	1,451	1,675	1,600
Total Supply	1,892	1,919	1,892	2,012	1,993
MY Exports	122	128	135	164	150
Feed and Residual	75	50	40	40	40
FSI Consumption	1,300	1,300	1,380	1,415	1,450
Total Consumption	1,375	1,350	1,420	1,455	1,490
Ending Stocks	395	441	337	393	353

Source: USDA PS&D, 2015

MEXICO



Market access

Mexico is the largest market for US grain and oilseed products in the Americas. NAFTA eliminated tariffs on all varieties of US grains and oilseeds.

Trade administration procedures and regulations continue to be complex. Lack of administration and regulation transparency hampers importers and creates unnecessarily complicated procedures. US commodities are subjected to multiple SPS measures and other requirements, which have created ongoing problems with delayed and blocked shipments of US commodities. Mexico is one of the more corrupt countries reviewed by Transparency International. Mexico scored a 35 on the Corruption Index in 2014.

Mexico’s stance on biotech varies among crops and is still evolving. Mexico has grown biotech crops, on a field trial basis, since 1988.

Grain-oilseed situation

Mexican farmers expanded wheat, corn, and sorghum plantings in recent years in response to the high global prices and to comply with new policies to ensure domestic food security.

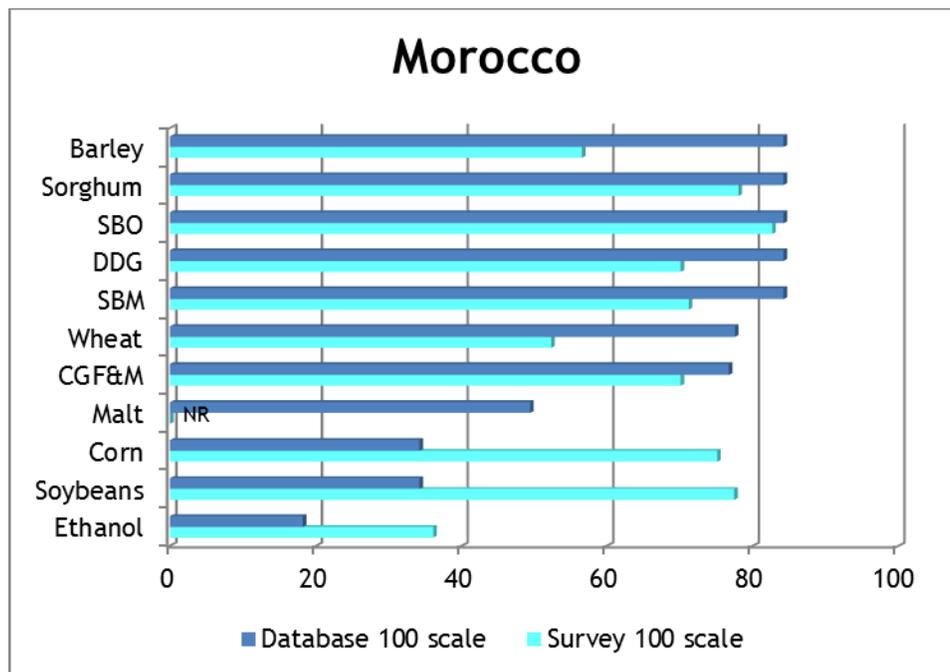
Mexico’s imports of corn have fluctuated substantially in recent years. They were 10 MMT in 2014/15. Soybean imports hit a record 3.8 MMT in 2014/15; soybean meal imports were 1.6 MMT. All corn imports came from the US, along with 90% of the imported soybeans and all of

the SBM. Wheat imports were 4.6 MMT, 3.1 MMT of which came from the US. Mexico's sorghum imports of 162,000 MT came from the US as well.

Mexico: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	679	662	579	638	696
Yield (mt/ha)	5.41	5.48	5.58	5.29	5.27
Beginning Stocks	508	317	575	278	319
Production	3,676	3,628	3,231	3,377	3,671
MY Imports	3,404	5,020	3,826	4,636	4,600
Total Supply	7,588	8,965	7,632	8,291	8,590
MY Exports	821	790	729	1,322	1,500
Feed and Residual	750	1,500	425	350	300
FSI Consumption	5,700	6,100	6,200	6,300	6,450
Total Consumption	6,450	7,600	6,625	6,650	6,750
Ending Stocks	317	575	278	319	340

Source: USDA PS&D, 2015

## MOROCCO



### Market access

The United States-Morocco Free Trade Agreement (FTA) went into force in 2006, gradually eliminating duties on more than 95 percent of all goods and services, including soybeans and DDGS. The remaining goods and services have a phase out period ending on December 31, 2015. Another trade agreement between the US and Morocco was concluded in December 2012 to further facilitate trade

Morocco relies on imported wheat to meet all its consumption needs. Wheat and durum have preferential access through two TRQs, but the administration of the TRQ continues to be fraught with difficulties. The major challenge is the wheat price support scheme. In an effort to gradually reform the subsidy arrangement over three years, the government held the price constant throughout 2014, resulting in large losses in the national budget.

Corn, soybeans, barley, and sorghum have benefited from the FTA, with most of the tariffs dropping to zero. However, malt and ethanol face tariffs of 40%, and 50%, respectively. Corn gluten feed and meal faces a tariff rate of 2.5%, while SBM and DDGS enter duty-free.

Conditions for exports have greatly improved, with low tariffs, better infrastructure, and predictable shipping services. Furthermore, customs service reforms have allowed for more timely and efficient processing and administration. Morocco, however, is still plagued by burdensome procedures and corruption remains a serious issue. Morocco scored a 39 in the 2014 report out of a possible 100 points (with 100 being the least corrupt) on Transparency International's Corruption Perceptions Index.

### Grain-oilseed situation

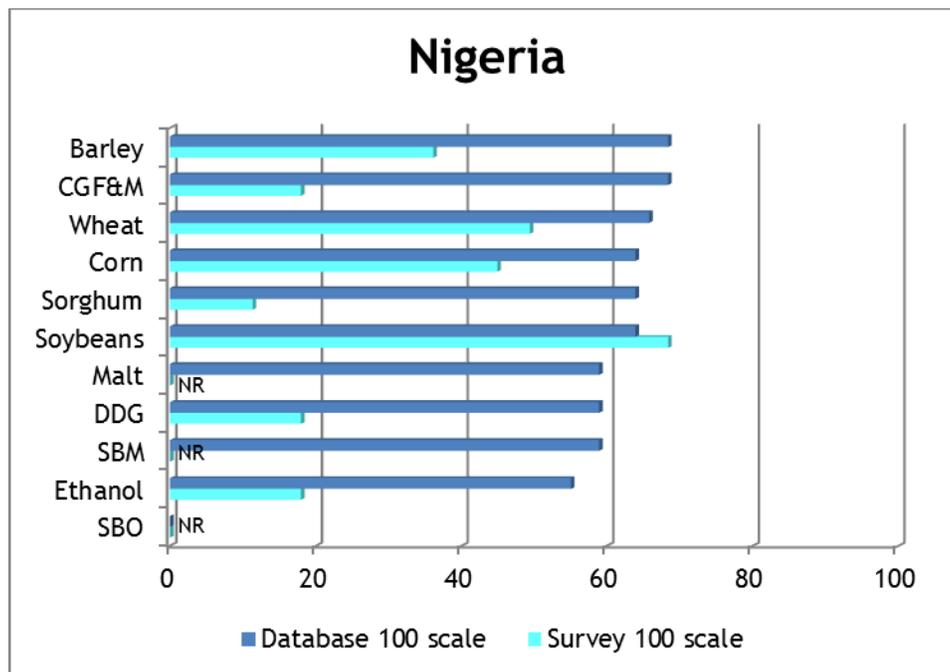
Morocco's wheat production is erratic due to climatic conditions. Consequently, it has become one of the world's largest wheat importers. Imports vary significantly from year-to-year, typically in the 3-4 MMT range. The US share of Morocco's wheat imports averages about 10%, but the US volume and share are highly variable.

Morocco imports 90% of its corn needs, but the US import share has dropped to an insignificant amount. Morocco does not produce soybeans. The US provided almost all of the market's supply. Soybean imports have dropped though, from 440,000 MT in 2007/08 to under 100,000 MT in recent years. Imports were up to 134,000 MT in 2013/14.

Morocco: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	2,852	3,040	3,142	3,280	3,060
Yield (mt/ha)	1.71	1.91	1.23	2.13	1.67
Beginning Stocks	1,878	2,762	3,305	2,472	4,185
Production	4,887	5,800	3,870	7,000	5,100
MY Imports	3,967	3,713	3,833	3,928	3,400
Total Supply	10,732	12,275	11,008	13,400	12,685
MY Exports	120	170	236	215	250
Feed and Residual	50	800	100	600	400
FSI Consumption	7,800	8,000	8,200	8,400	8,600
Total Consumption	7,850	8,800	8,300	9,000	9,000
Ending Stocks	2,762	3,305	2,472	4,185	3,435

Source: USDA PS&D, 2015

## NIGERIA



### Market access

Although a committee was established in September 2011 to review trade practices, resistance from the government and the private sector has prevented the implementation of these reforms. Since these reforms have been blocked most recent trade reforms occurred in September 2008 with the adoption of the ECOWAS common external tariff.

Nigeria's wheat and corn tariffs are 5%, soybeans, DDGS, and SBM are 10%, and SBO is 35%. Application of these duties is not transparent or consistent. Nigeria frequently uses nontariff measures to block imports. Nigeria's import policies and restrictions are designed to protect local production and limit imports. Indeed SBO is completely banned from importation.

The US has an 85% share of Nigeria's wheat market. Nigeria is the second largest export destination for US wheat (after Japan) and the largest market for hard red winter wheat. In November 2011 new regulations were enacted requiring wheat millers to include 10% cassava in their flour production, to limit wheat imports. A similar requirement was imposed in 2005 but was rescinded because there was insufficient cassava processing capacity at that time to meet the regulation.

Technical barriers present challenges for exports. Nigeria requires phytosanitary certificates, import permits, and destination inspection for all imports. Moreover, a long list of prohibited items and declaration requirements results in almost all containers being physically examined, which adds additional delays and costs to imports.

Although Nigeria has no laws governing agricultural biotechnology or biosafety, the government is generally supportive of biotechnology.

International monitoring groups routinely rank Nigeria among the most corrupt countries in the world, with the latest Transparency International rating being 27. Nigeria’s corruption levels remain high and its main anticorruption institution, the Economic and Financial Crimes Commission has faltered recently in its reputation and commitments on the issue.

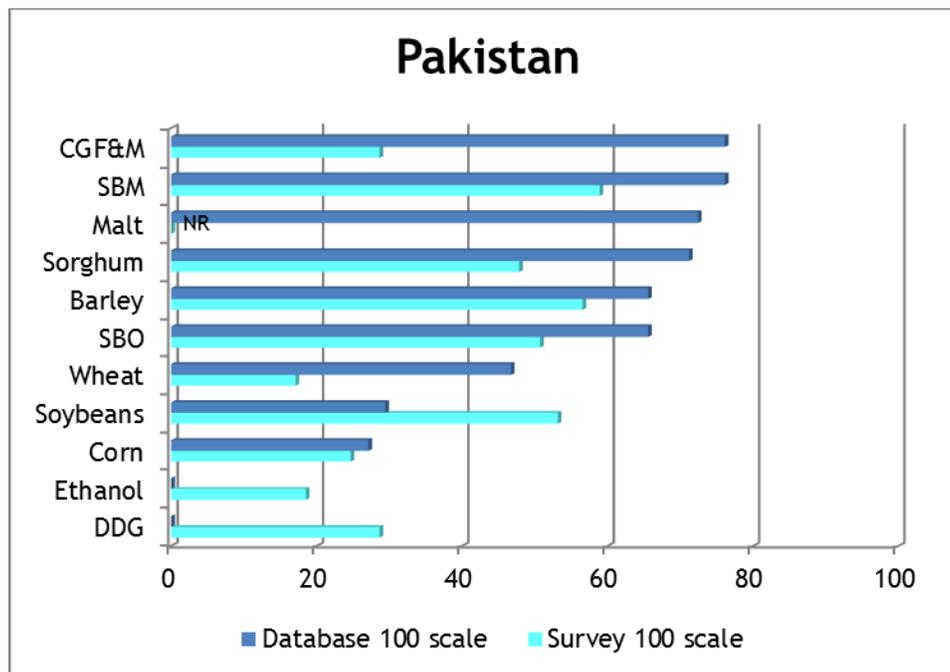
### Grain-oilseed situation

Nigeria produces limited quantities of wheat and imports almost all the wheat consumed. Nigeria is one of the largest global destinations for US wheat exports. In 2011/12 Nigeria imported 2.8 MMT of wheat from the US, 68% of total imports. The country also produces corn (about 9 MMT) and soybeans (less than 500,000 MT), but imports minimal volumes of these commodities. The US exported less than 26,000 MT of corn to Nigeria in 2011/12 and only 1,363 MT of SBM.

Nigeria: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	95	95	80	70	70
Yield (mt/ha)	1.05	1.05	1	1	1
Beginning Stocks	200	200	200	200	200
Production	100	100	80	70	70
MY Imports	4,052	3,931	4,140	4,550	4,750
Total Supply	4,352	4,231	4,420	4,820	5,020
MY Exports	570	480	250	500	600
Feed and Residual	50	50	100	50	50
FSI Consumption	3,532	3,501	3,870	4,070	4,170
Total Consumption	3,582	3,551	3,970	4,120	4,220
Ending Stocks	200	200	200	200	200

Source: USDA PS&D, 2015

PAKISTAN



Market access

Pakistan is a minor export market for US goods. Soybeans and sorghum enter duty free, while corn, wheat, and byproduct feed tariffs are 10%. Crude SBO is assessed just under \$100/MT instead of a percentage. Ethanol is the major exception; it faces tariffs of 50-90% depending on its strength. The soybean meal tariff was raised to 11% in mid-2014 and this has stimulated soybean imports.

Quantitative restrictions on US agricultural exports are minimal; however, technical barriers are prohibitive for most commodities. US wheat is subject to SPS obstacles in the form of an unreasonable test for rye disease. White wheat exports are also blocked by an unusually high wet gluten content requirement. In addition, Pakistan customs requires that commercial invoices and packing lists be included inside each shipping container. Currently there are no restrictions on importing genetically modified products from the US as long as they meet US standards.

The government controls the entire wheat marketing system, including setting prices, managing inventories, and controlling imports and exports. With good crops in recent years, exports have been authorized and often require export subsidies.

Domestic security is an issue and Pakistan is plagued with corruption, scoring a 27 of a possible 100 points on Transparency International's Corruption Perceptions Index. Moreover, a weak judicial system makes law and contract enforcement difficult for foreigners. Lack of

transparency is a recurrent and substantial problem in many areas, including government procurement and customs valuation.

### Grain-oilseed situation

Wheat bread is a staple in Pakistani diets, comprising up to 70% of their caloric intake. As a result, wheat is grown by 80 percent of Pakistani farmers. The government sets wheat prices, which are uncompetitive in the world market, thus limiting exports. Pakistan imports a negligible amount of wheat, but does buy 10-20,000 MT of US specialty wheat each year.

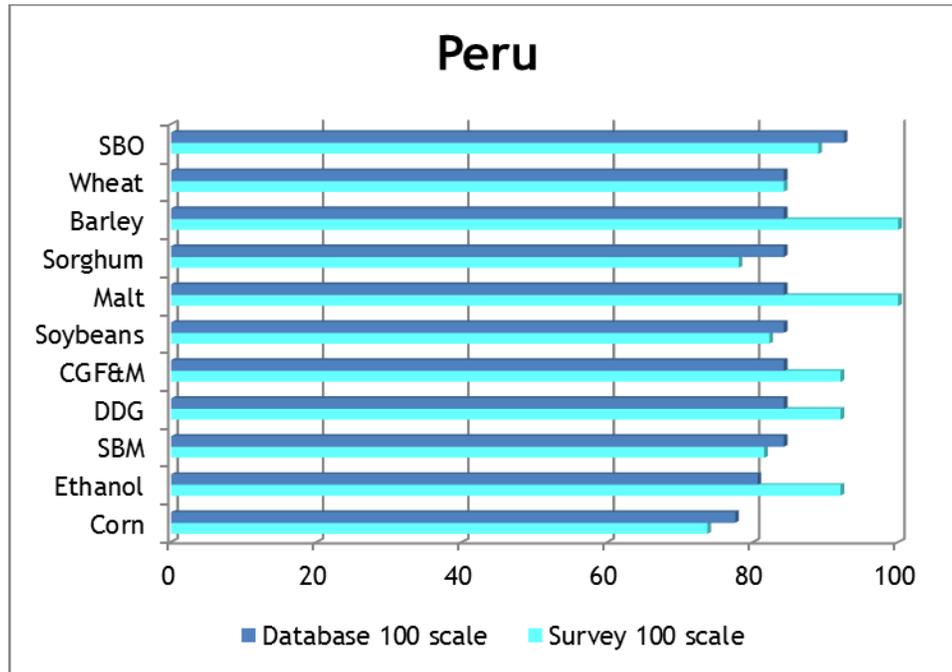
Pakistan is self-sufficient in corn, and soy production is small. Pakistan produces 1.0 MMT of cottonseed and rapeseed oil, but more than 70% of edible oil demand is met by imports of palm oil. Soybean oil accounts for less than 3% of consumption.

Pakistan imports small quantities of SBM and negligible quantities of soybeans and soybean oil. However, in late 2014 Pakistan bought 51,000 MT of US soybeans and 44,000 MT of US soybean meal. Meal imports have been primarily Indian due to lower freight costs.

Pakistan: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	9,030	8,900	8,660	8,640	9,100
Yield (mt/ha)	2.65	2.81	2.69	2.78	2.8
Beginning Stocks	3,556	3,168	4,020	2,622	2,172
Production	23,900	25,000	23,300	24,000	25,500
MY Imports	112	52	52	400	750
Total Supply	27,568	28,220	27,372	27,022	28,422
MY Exports	1,400	1,100	850	750	700
Feed and Residual	400	400	600	600	1,000
FSI Consumption	22,600	22,700	23,300	23,500	23,500
Total Consumption	23,000	23,100	23,900	24,100	24,500
Ending Stocks	3,168	4,020	2,622	2,172	3,222

Source: USDA PS&D, 2015

PERU



**Market access**

The US-Peru free trade agreement (PTPA) went into full effect in 2009. It immediately eliminated tariffs on almost all agricultural products, including wheat, soybeans, SBO, DDGS, and soybean meal. Most products enter Peru duty free from the US. Note: corn enters Peru duty-free from all sources.

Peru does use the Andean Price Band System (APBS), however. Even though it had agreed to eliminate the APBS for US products, the levy is still being applied to them.

The US also had a yellow corn duty-free TRQ of 669,113 MT in 2014 (it began at 500,000 MT in 2009 and has increased 6% annually, which it will continue to do until it is phased out in 2020). The US has been fully using the quota and shipping additional corn beyond the quota.

**Grain-oilseed situation**

Peru imports 90% of its wheat requirements. In recent years, about one third of the 1.5 million tons of wheat imported has been of US origin.

Corn demand is growing because of a growing poultry sector. Imports were 2.2 MMT in 2013/14, 1.7 MMT from the US, mostly for use by the poultry industry. FAS reports that the poultry and dairy sectors are importing DDGS only for testing purposes.

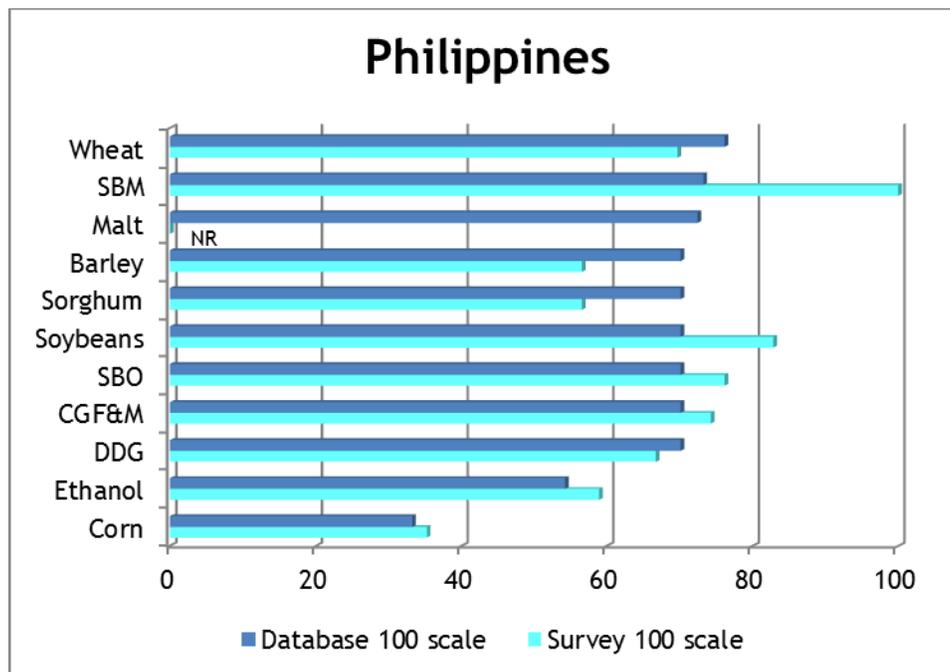
Peru imports primarily soybean meal (900,000 MT); the country also imported 249,000 MT of soybeans in 2013/14. Imported soybeans and SMB come primarily from Bolivia. In 2013/14, the

US shipped 470,000 MT of wheat, 1.5 MMT of corn, 74,000 MT of soybean oil, and 37,000 MT of SBM to Peru.

Peru: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	172	145	150	152	145
Yield (mt/ha)	1.34	1.48	1.5	1.52	1.55
Beginning Stocks	283	384	301	246	449
Production	230	215	225	231	225
MY Imports	1,757	1,585	1,683	2,078	1,700
Total Supply	2,270	2,184	2,209	2,555	2,374
MY Exports	91	73	68	86	75
Feed and Residual	70	60	70	70	70
FSI Consumption	1,725	1,750	1,825	1,950	1,935
Total Consumption	1,795	1,810	1,895	2,020	2,005
Ending Stocks	384	301	246	449	294

Source: USDA PS&D, 2015

## PHILIPPINES



### Market access

The Philippines has relatively open market access, especially since the 2010 implementation of the ASEAN FTA that reduced tariffs to 0-5% for all goods. This FTA puts US exporters at a slight disadvantage. Most grains and oilseeds from the US face tariffs of 1-7%. The exception is corn, which has an in-quota tariff of 35% and an out-of-quota tariff of 50%. Various import surcharges are regularly applied.

In mid-2014, plans for new regulations that would have required container inspections were shelved indefinitely due to port congestion and complaints by foreign suppliers. The Philippines mandates a 10% blend of ethanol in motor fuel but this has been unenforceable due to insufficient domestic production and high cost. Imports of fuel ethanol from the United States are up and face only a one percent duty with Department of Energy certification. The Corruption Perceptions Index rated the Philippines at 38 out of a possible 100.

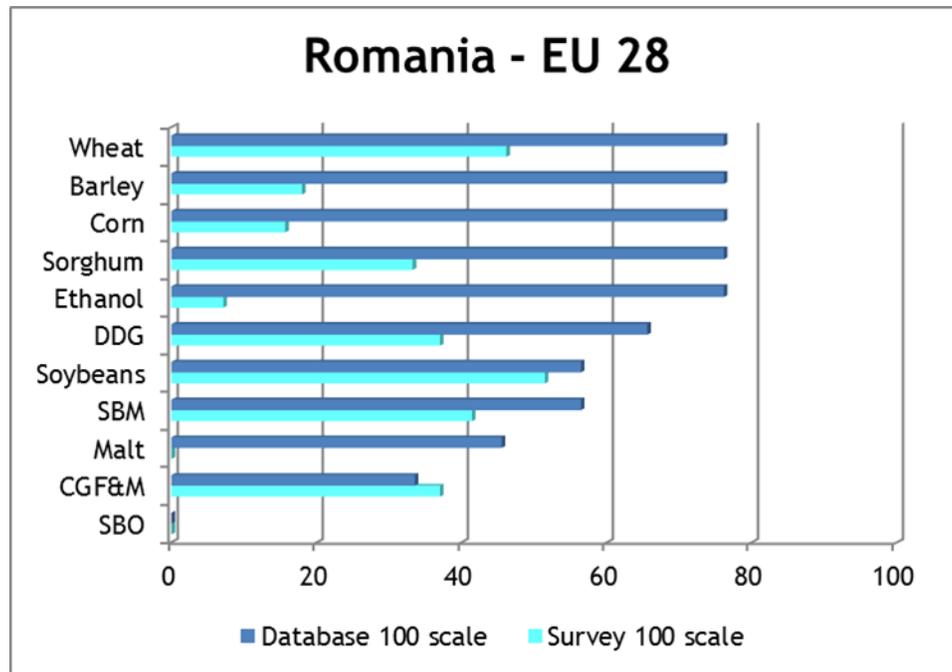
### Grain-oilseed situation

The Philippines are expected to import 4 MMT of wheat in both 2014/15 and 2015/16, of which about 2 MMT will likely come from the US. The country has been largely self-sufficient in corn but imports of both corn and distillers grains have begun to play a role as livestock industries have modernized and feed demand has grown. The Philippines does not grow soybeans; it imports about 125,000 tonnes per year for the sole crushing facility. The Philippines now imports almost 2.5 MMT of soybean meal. Imports are expected to continue to grow as demand for meat grows.

Philippines: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Beginning Stocks	675	658	1,044	876	788
MY Imports	3,224	4,075	3,645	3,482	4,100
Total Supply	3,899	4,733	4,689	4,358	4,888
MY Exports	41	39	28	25	25
Feed and Residual	950	1,375	1,500	1,250	1,400
FSI Consumption	2,250	2,275	2,285	2,295	2,475
Total Consumption	3,200	3,650	3,785	3,545	3,875
Ending Stocks	658	1,044	876	788	988

Source: USDA PS&D, 2015

ROMANIA



Market access

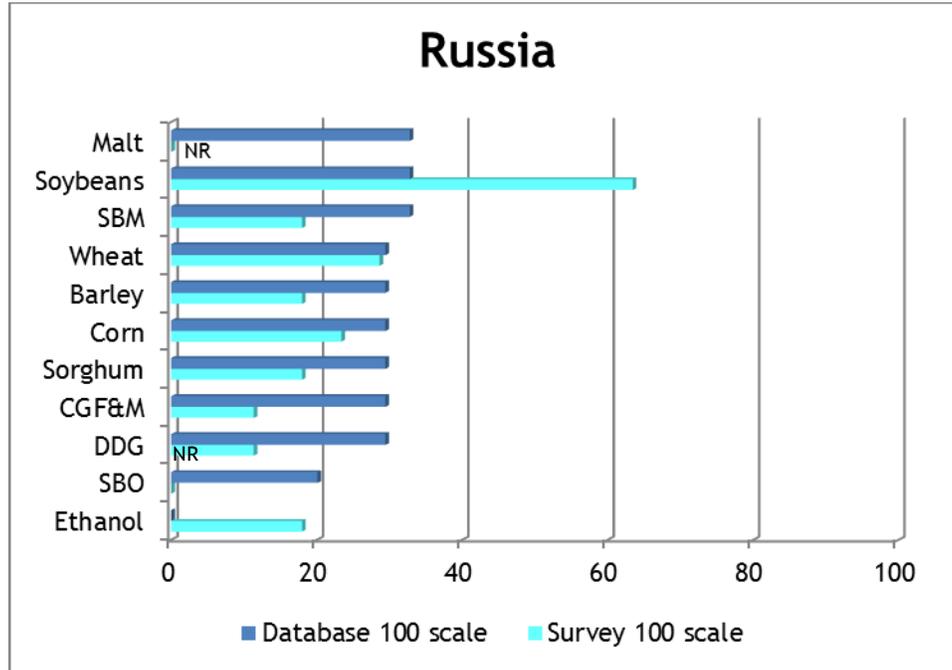
Romania is a member of the European Union so the basic framework of import regulations is the same as for other member states. Of course, the implementation of the regulations can vary from country to country within the EU. In addition, corruption is a persistent problem in Romania. It scored 43 on the Corruption Perception Index. We show two charts for Romania because we had survey scores for both the EU as a whole and for soybeans and soybean meal in Romania.

Grain-oilseed situation

Among the EU member states, Romania is a major producer and exporter of both wheat and corn. In recent years, wheat production has been about 7 MMT, accounting for about 5% of EU production. Corn production is about 9 MMT, representing 14% of total EU output. The main oilseed produced is sunflower seed.

USDA does not maintain PSD tables for Romania.

**RUSSIA**



**Market access**

On August 22, 2012, Russia became the WTO’s 156<sup>th</sup> member. Then in December, President Obama signed legislation revoking the Jackson-Vanick amendment, allowing for resumption of normal trade relations between the US and Russia. The scoring for Russia indicates the market access at the end of 2014. While nominally open to imports of most grains and oilseeds, technical and procedural barriers remain.

Imports of grain and byproduct feeds are subject to a 5% duty. Soybeans and soybean meal are duty free. Soybean oil for edible use faces a 15% duty.

Although Russia no longer requires import licenses (as of 2013) for anything except alcohol, it continues to maintain a number of import barriers, including discriminatory and prohibitive charges and fees, activity and warehouse licenses and registration, and certification regimes. US companies report that Russian standards and procedures for certifying imported products are non-transparent, expensive, time-consuming, and redundant.

Corruption remains an issue as Russia is one of the most corrupt countries reviewed. Russia scored 27 out of 100 on the Corruption Perceptions Index.

In early 2012, Russia passed legislation that will promote biotechnology development in Russia, with the goal of creating biotech-oriented cultivation by 2020. Biotech crops and food or feed containing a biotech event are permitted if it is registered and the individual product is

registered. Only products containing more than 0.9% GMO (0.5% for non-registered events) must be declared as GMO.

In early 2013, a temporary ban on biotech corn (NK603) was lifted after studies concluded it was safe for consumption. However, there is still consumer resistance to GMOs and some parts of the country have declared themselves GMO-free zones.

### Grain-oilseed situation

Russian wheat yields reached 2.5 metric tons per hectare in 2014, pushing production to 59 MMT. Historically Russia has been a major wheat exporter but has sometimes imposed export bans when the crop is poor. This year, despite a very big crop, it announced an export tariff on February 1, 2015. Barley production has also risen to meet strong domestic and export demand.

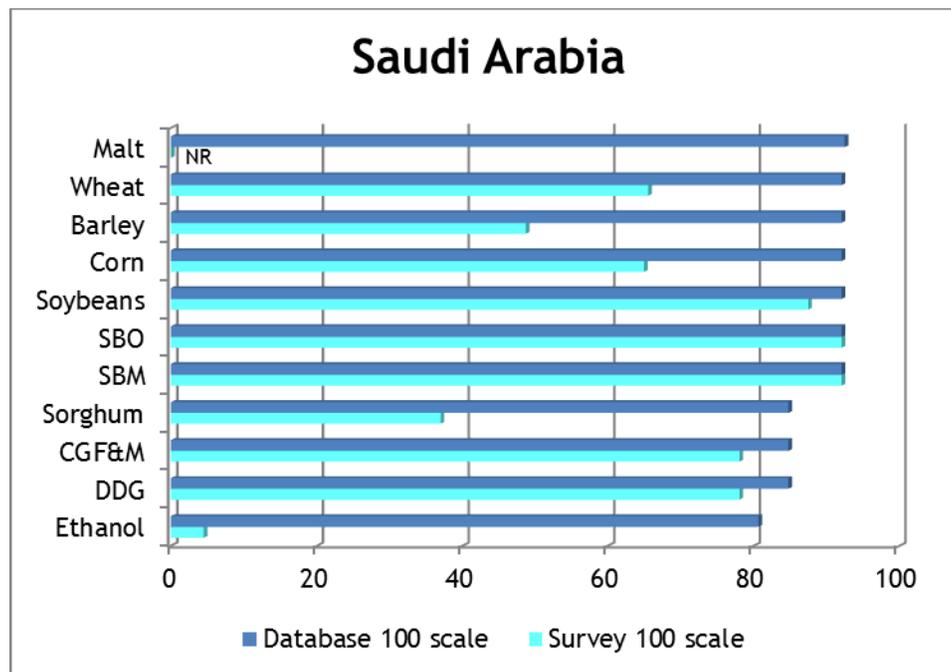
Russia does not permit planting of genetically engineered crops, but conventional plantings of corn and soybeans have been expanding. Russian exports of corn have grown from almost nothing in 2010 to a projected 2.5 million metric tons in 2014/15. Imports have remained nominal.

As meat consumption increased in Russia, more soybeans and soybean meal have been needed for livestock feed. Soybean production doubled from 2010 to 2014 and imports have risen to the 1.5-2.0 MMT range. Crushings almost doubled to 3.9 MMT. However, GDP is now contracting due to the fall in petroleum prices and sanctions imposed by trading partners in response to Russian actions in Ukraine. US grain and oilseed trade with Russia has been negligible and will remain so.

Russia: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	21,750	24,814	21,296	23,399	23,636
Yield (mt/ha)	1.91	2.27	1.77	2.23	2.5
Beginning Stocks	14,722	13,736	10,899	4,952	5,209
Production	41,508	56,240	37,720	52,091	59,080
MY Imports	89	550	1,172	800	350
Total Supply	56,319	70,526	49,791	57,843	64,639
MY Exports	3,983	21,627	11,289	18,534	20,500
Feed and Residual	16,000	15,500	11,900	12,500	13,000
FSI Consumption	22,600	22,500	21,650	21,600	22,500
Total Consumption	38,600	38,000	33,550	34,100	35,500
Ending Stocks	13,736	10,899	4,952	5,209	8,639

Source: USDA PS&D, 2015

## SAUDI ARABIA



### Market access

Since the last report, there have been no significant access changes in Saudi Arabia. There are no quantitative barriers for US products and wheat, barley, corn, soybeans and soybean meal are duty free. The tariff for sorghum, malt, soybean oil, and byproduct feeds is 5%. There are few technical or procedural barriers to trade: biotech labeling, expiration date regulations, and Arabic labeling requirements are problematic. Also, phytosanitary measures are in place for wheat, barley, corn, sorghum, and soybeans. Furthermore, certain products must meet fumigation requirements.

With respect to biotechnology, Saudi Arabia has implemented the Gulf Standardization Organization's technical regulations on imports of genetically modified agricultural products. Labeling is required if a product has more than one percent genetically engineered content. The GSO is a regional organization of seven countries' standards bodies.

Corruption continues to decline in Saudi Arabia which most recently scored 49 out of a possible 100 points (with 100 being the least corrupt) on Transparency International's Corruption Perceptions Index.

### Grain-oilseed situation

In 2012, Decree 335 was implemented, eliminating wheat production in Saudi Arabia by 2016 to save water. Saudi Arabia will become completely dependent on foreign suppliers for staple foods. Saudi Arabia's King Abdullah has encouraged domestic investors to invest in agricultural

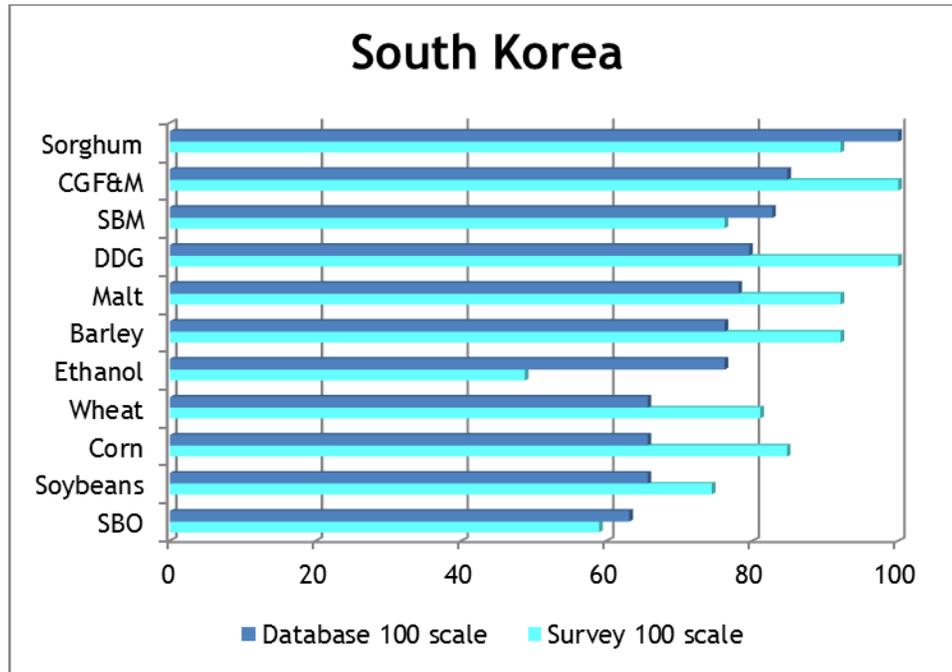
firms in countries that have a comparative advantage in food production in order to establish food security for his nation.

Saudi corn production is negligible; the country now imports 2.5-3-5 million tons annually. In recent years, US corn has accounted for a quarter to a half of the imports. Saudi Arabia is the world's leading barley importer but does not usually purchase much from the United States.

Saudi Arabia is not a major soybean importer but their purchases from the United States have increased in recent years. In 2013/14, US exports of soybeans to Saudi Arabia were 274,000 MT. US soybean meal usually accounts for a small share of the 700,000 MT the country imports.

USDA does not maintain PSD tables for Saudi Arabia.

**SOUTH KOREA**



**Market access**

South Korea is a leading market for US wheat, corn, and soybeans. In 2012, the US-Korean FTA went into effect, lowering many tariffs or eliminating them altogether. South Korea import quotas are mostly non-restrictive; with the FTA, several items now have unlimited access. Quotas were imposed on edible soybeans, however. For 2015 the quota is about 270,000 MT. Duties on soybean oil are being phased out and are now down to 1% for crude and 4.8% for refined.

South Korea has stricter mycotoxin limits than most other countries, which concerns US wheat exporters. Biotech crops and products for food and feed are permissible, but must be labeled and may not be propagated. Foods for human consumption containing biotech events must undergo a complete safety assessment conducted by the South Korean FDA. Until an event is approved it may not be imported or sold on the South Korean market. In general, there has been strong consumer and government resistance to biotech products, especially for human consumption. This negative public perception has caused some companies to seek out non-GMO corn and soybeans, primarily from China.

Non-GMO grains must be certified as such, by either an import permit or official government certification. The Ministry of Food and Safety maintains a zero-tolerance policy for the inadvertent presence of biotech content in processed organic products.

### Grain-oilseed situation

Historically the US provided a high proportion of South Korea's overall grain and oilseed imports. US exports of corn to South Korea rebounded to 5.3 MMT in 2013/14, roughly half of total imports, but are not quite matching that pace in the current year. The US still supplies 25% of wheat imports.

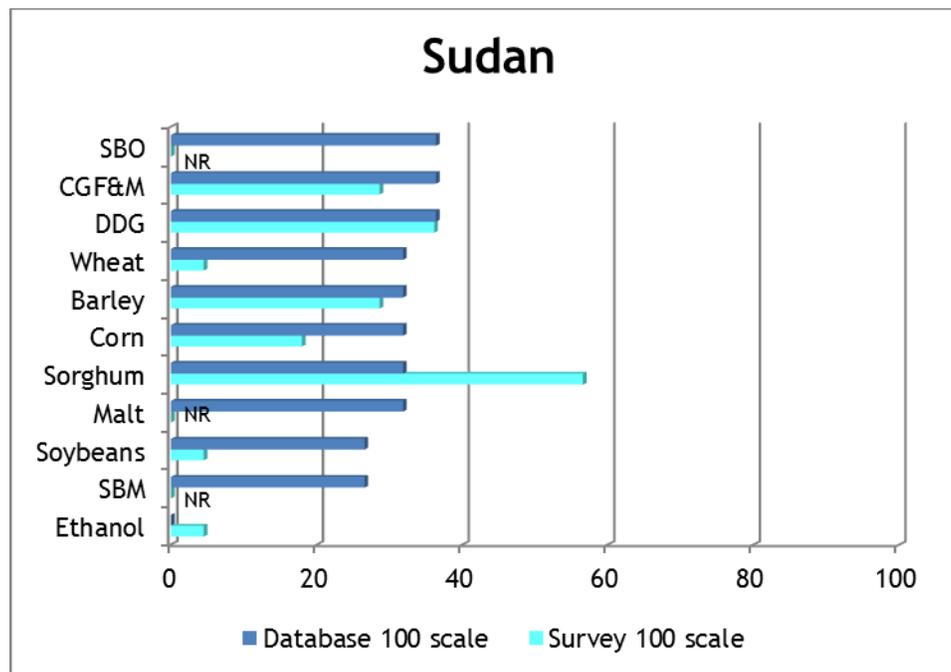
South Korea produce little wheat, barley or corn. The country annually imports about four million tons of wheat (a quarter to a third is from the US) and ten million tons of corn. Corn sourcing varies; the US share of imports has been about 50% recently, down from 75-80% in prior years.

Imported soybeans account for most of the oilseed meal produced in South Korea. It imports 1.3 MMT of soybeans annually. The US share of that is about 50%. In addition, the country imports 1.9 MMT of soybean meal, but US market share is small, only 10%.

Korea, South: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	13	9	9	7	7
Yield (mt/ha)	3	4.89	4.11	3.86	3.86
Beginning Stocks	1,118	1,466	1,386	1,521	1,437
Production	39	44	37	27	27
MY Imports	4,761	5,188	5,439	4,288	3,800
Total Supply	5,918	6,698	6,862	5,836	5,264
MY Exports	125	131	144	144	150
Feed and Residual	1,965	2,870	2,818	1,936	1,400
FSI Consumption	2,362	2,311	2,379	2,319	2,320
Total Consumption	4,327	5,181	5,197	4,255	3,720
Ending Stocks	1,466	1,386	1,521	1,437	1,394

Source: USDA PS&D, 2015

## SUDAN



### Market access

Sudan is a member of COMESA, the Common Market for Eastern and Southern Africa. In theory, that group of countries constitutes a free trade area, moving towards a customs union with a common external tariff of 0% for capital goods and raw materials, 10% for intermediate products, and 25% for finished products. In practice, there is little correlation between the stated duty rates and actual import duty rates. Sudan's tariffs remain very high at 25% for grains and feeds, except durum and sorghum, and 40% on soybean oil. Durum wheat has a tariff of 3% while sorghum is duty free. In place of TRQs, Sudan routinely applies seasonal bans to control imports.

Sudan applies a variety of significant service fees for shipping, clearing and forwarding services as well as several additional taxes. In addition, Sudan applies a 10% VAT on imported products. There are also various charges, estimated at USD 25, payable to each of the five state governments between Khartoum and Port Sudan.

Certificates of origin and phytosanitary certificates are required. Shipments to Sudan must be covered by a bill of lading and a separate certificate of origin that must be issued by the competent authority in the country of origin. Commercial invoices must show the name and address of supplier and purchaser, quantity, gross weight, etc. Genetically modified seeds are prohibited. Corruption is perceived to be a major problem in Sudan, scoring among the lowest in the world, at just 11 out of a possible 100 on Transparency International's index.

### Grain-oilseed situation

The bulk of Sudan's population of 38 million is involved in subsistence farming and about 80% of employment is in agriculture. South Sudan has a population of 11 million. USDA has not disaggregated their data since South Sudan was formed in 2011 so the following discussion covers both countries. Sorghum and wheat are the major food grains. Sudan normally produces about 4 MMT of sorghum and supplements this with about 100,000 - 200,000 MT of imports, of which an average of 50,000 MT come from the US. However, the 2014 crop exceeded 6 MMT due to favorable weather.

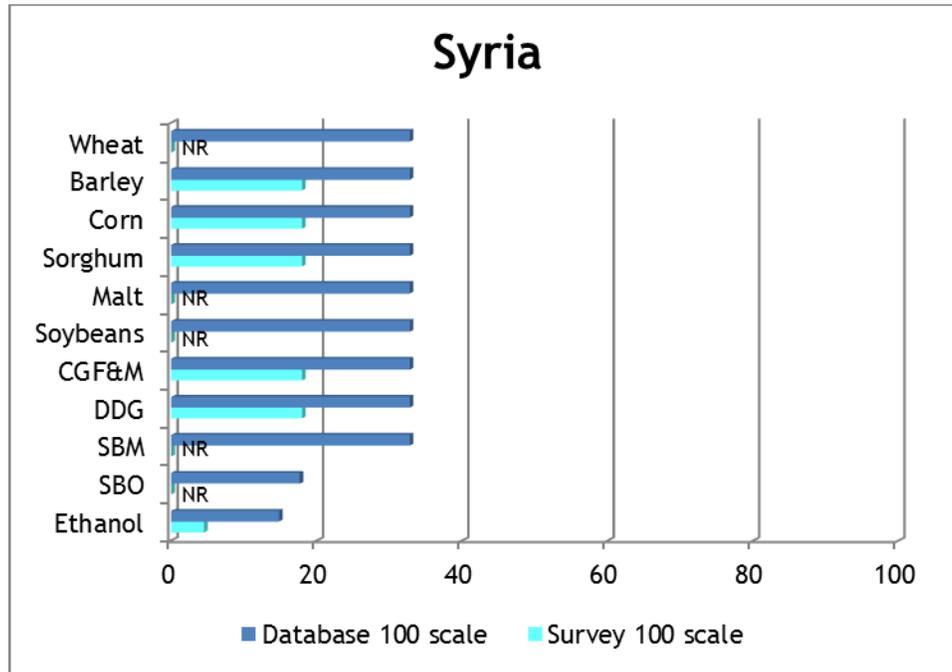
Wheat production is much lower at about 300-500,000 MT. Imports of about 2.6 MMT raise available supplies to the 2.9 MMT needed to feed the population. US exporters have only occasionally managed to sell small quantities of US wheat to the country, and nothing in more than five years.

Sudan does not have much active trade in the oilseed sector. Domestic disappearance of oilseed meals is about 400,000 MT and this requirement is met primarily from domestic production of groundnut (peanut), cottonseed, and sesame meals. The country consumes a similar quantity of fats and oils, but imports are only about 100,000 MT and soybean oil is virtually nonexistent.

Sudan: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	225	183	187	117	225
Yield (mt/ha)	1.79	1.77	1.36	1.66	2.1
Beginning Stocks	200	50	350	129	262
Production	403	324	254	194	473
MY Imports	1,595	2,360	1,793	2,664	2,600
Total Supply	2,198	2,734	2,397	2,987	3,335
Feed and Residual	50	50	25	25	25
FSI Consumption	2,098	2,334	2,243	2,700	2,900
Total Consumption	2,148	2,384	2,268	2,725	2,925
Ending Stocks	50	350	129	262	410

Source: USDA PS&D, 2015

**SYRIA**



**Market access**

Syria has low tariffs in the 1-3% range for many commodities, but 10% on DDG and corn gluten.

The civil war has disrupted trade, in part due to sanctions imposed by trading partners. Even in normal times, import requirements and procedures are complicated, especially the requirement that importers obtain an import license from the Ministry of Economy and Trade. In addition, importers of agricultural and food products often must secure prior approval from the Ministry of Agriculture and Agrarian Reform. Testing imports at the Central Laboratory for Feed is very difficult. Weed seeds are a real problem in such tests. A ship load can be refused if certain un-permissible weed seeds are present in the shipment. Imports of food products should be accompanied by a certificate of origin, a phytosanitary certificate, an analysis certificate, and a certificate for the level of radiation. All certificates must be authenticated by the Syrian embassy in the country of origin, or any other Arab consulate if there is no Syrian embassy in the country of origin.

There is zero tolerance for ergot and some US cargos have been turned away due to its presence.

Corruption can be a problem in Syria, which scores in the bottom third of countries, at 20 on Transparency International’s 10-point scale.

### Grain-oilseed situation

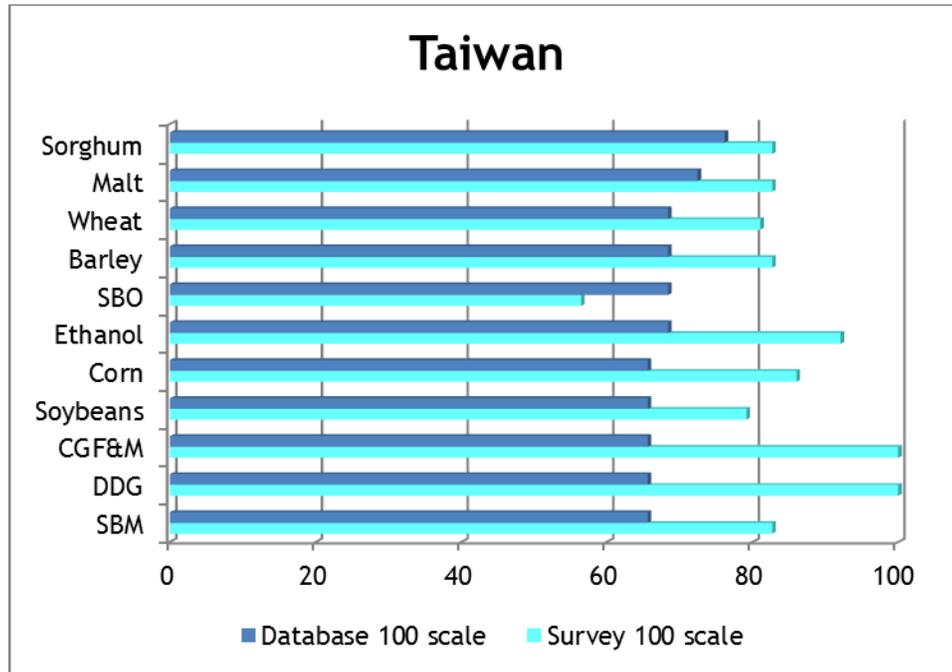
Syria is a key country in the Middle East and had a population of 23 million plus about 1 million Iraqi refugees. Between death losses and emigration, it has undoubtedly declined. Demand for basic agricultural commodities had been growing steadily but has been disrupted by the ongoing civil strife. About 17% of employment is in agriculture and the country was once a net exporter of wheat. However, Syria has become an importer of more than 1.5 MMT annually, mostly from Russia and Ukraine. Syria produces 0.5-1.0 MMT of barley and imports about 300,000 MT for animal feed, again mostly from Black Sea origins. Corn is the other major feed grain and Syria only produces a small amount. At the beginning of the decade, the United States was supplying almost one million MT annually but that has dropped to zero. Total imports are now running at less than 0.5 MMT annually.

Syria is not a significant oilseed producer. It had been importing 400-500,000 tons of soybeans each year but that has dropped to negligible levels. Imports of oilseed meals have fallen as well. Imports of fats and oils exceed 200,000 MT but the US has not sold any soybean oil there in recent years.

Syria: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	1,350	1,600	1,600	1,550	1,300
Yield (mt/ha)	2.67	2.41	2.31	2.58	1.92
Beginning Stocks	3,449	2,877	2,782	2,560	3,339
Production	3,600	3,850	3,700	4,000	2,500
MY Imports	428	680	963	1,579	1,700
Total Supply	7,477	7,407	7,445	8,139	7,539
Feed and Residual	400	400	625	800	700
FSI Consumption	4,200	4,225	4,260	4,000	3,700
Total Consumption	4,600	4,625	4,885	4,800	4,400
Ending Stocks	2,877	2,782	2,560	3,339	3,139

Source: USDA PS&D, 2015

TAIWAN



Market access

Price and quantitative controls and non-tariff barriers substantially restrict US market access to Thailand. In addition, the ASEAN pact gives preferential access to countries producing needed imports that are close in proximity. Sales of agricultural products remain exempt from the value-added tax implemented in 1992, even for non-preferential countries.

TRQ restrictions on corn and soybean oil remain as before. There is a 54,700 MT TRQ for corn with an in-quota duty rate of 20%. The quota and rates for cooking oils are especially restrictive. The amount of oil allowed is limited to 2,281 mt and subject to a 20% duty rate in quota and an out-of-quota rate of 146%.

In November 2013, the Thai government granted an unlimited in-quota amount of soybeans with a zero percent tariff rate through 2016. In July 2014 it approved and an unlimited in-quota amount of soybean meal with a tariff reduction to 2%. In both cases, import permits are still required. Imports from ASEAN countries enjoy quota and tariff free access, in accordance with the ASEAN FTA that went into effect on January 1, 2010.

Although the government of Thailand maintains relatively open access according to WTO tariff quota rules, US exporters report restrictive and burdensome requirements for import permits and licenses, including compulsory purchase of local feed ingredients. Thailand maintains a complicated and burdensome import permit regime. Feed and livestock price controls are non-transparent. Importers report inconsistent application of WTO transaction valuation

methodology for customs clearance of fees and taxes. Thailand's customs pricing system often disregards the declared transaction price of products.

### Grain-oilseed situation

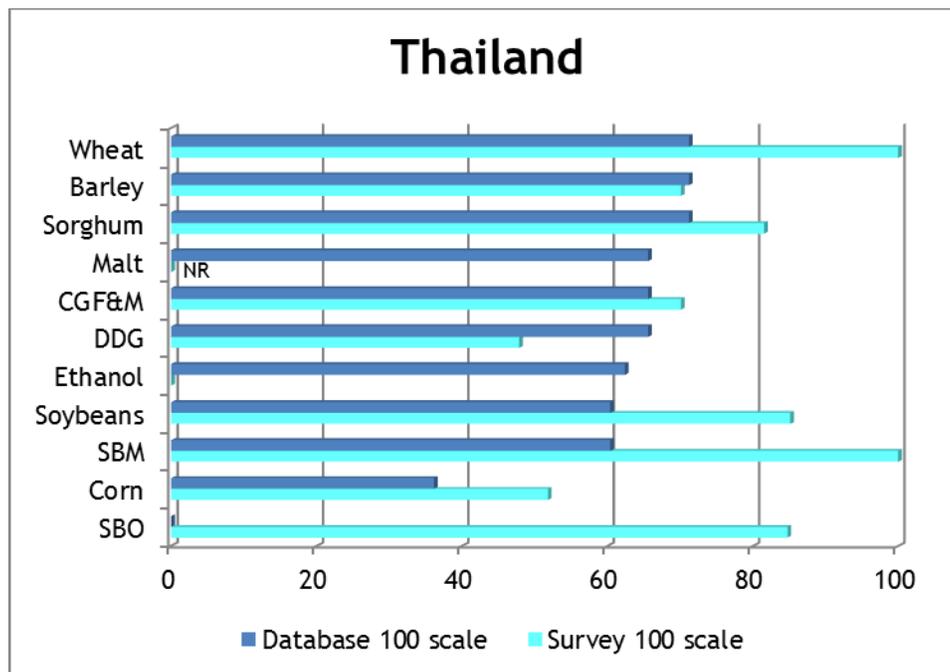
Corn and wheat consumption in Thailand have grown quite a bit over the past four years, and there has also been some increase in soybean meal demand. Thailand produces most of its corn needs. Imports and exports vary year to year, but have averaged about half a million tons annually over the last six years. Thailand imports virtually no corn from the US. There is no wheat production so the country imports an average of 2 MMT, of which about 500,000 tons are US origin.

Thailand imports about 2.9 MMT of soybean meal and about 1.9 MMT of soybeans annually. The US typically supplies about 15% of the soybeans and about 10% of the meal. The US supplied almost 500,000 MT of soybeans in 2013/14.

Taiwan: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Beginning Stocks	436	528	441	478	427
MY Imports	1,332	1,353	1,401	1,296	1,350
Total Supply	1,768	1,881	1,842	1,774	1,777
MY Exports	35	41	49	57	50
Feed and Residual	55	209	85	40	0
FSI Consumption	1,150	1,190	1,230	1,250	1,270
Total Consumption	1,205	1,399	1,315	1,290	1,270
Ending Stocks	528	441	478	427	457

Source: USDA PS&D, 2015

## THAILAND



### Market access

Price and quantitative controls and non-tariff barriers substantially restrict US market access to Thailand. In addition, the ASEAN pact gives preferential access to countries producing needed imports that are close in proximity. Sales of agricultural products remain exempt from the value-added tax implemented in 1992, even for non-preferential countries.

TRQ restrictions on corn and soybean oil remain as before. There is a 54,700 MT TRQ for corn with an in-quota duty rate of 20%. The quota and rates for cooking oils are especially restrictive. The amount of oil allowed is limited to 2,281 mt and subject to a 20% duty rate in quota and an out-of-quota rate of 146%.

On December 29, 2009, the Thai government granted an unlimited in-quota amount of soybeans with a zero percent-tariff rate and an unlimited in-quota amount of soybean meal with a tariff reduction from 4% to 2%, but only for certain importers with a domestic purchase agreement. Imports from ASEAN countries enjoy quota and tariff free access, in accordance with the ASEAN FTA that went into effect on January 1, 2010.

Although the government of Thailand maintains relatively open access according to WTO tariff quota rules, US exporters report restrictive and burdensome requirements for import permits and licenses, including compulsory purchase of local feed ingredients. Thailand maintains a complicated and burdensome import permit regime. Feed and livestock price controls are non-transparent. Importers report inconsistent application of WTO transaction valuation

methodology for customs clearance of fees and taxes. Thailand's customs pricing system often disregards the declared transaction price of products.

In July 2011, the government issued a rule requiring imported DDGS to be at least 26% protein, which will increase testing costs.

### Grain-oilseed situation

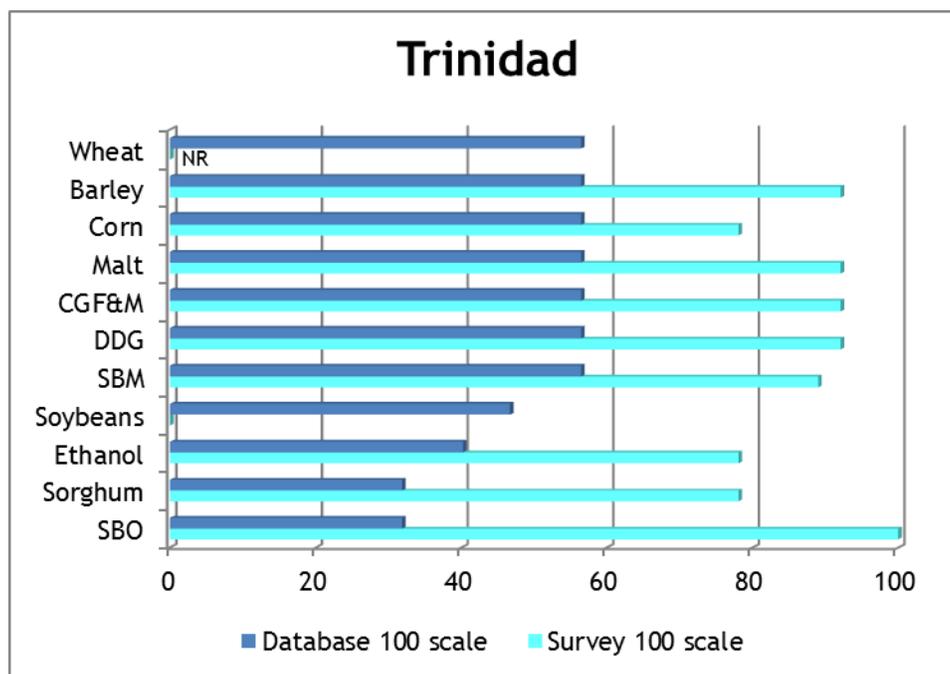
Corn and wheat consumption in Thailand have grown quite a bit over the past five years, and there has also been some increase in soybean meal demand. Thailand produces most of its corn needs. Imports and exports vary year to year, but have averaged about half a million tons annually over the last six years. Thailand imports virtually no corn from the US. There is no wheat production so the country imports an average of 1.7 MT, of which about 500,000 tons are US origin.

Thailand imports about 2.2 MMT of soybean meal and about 1.8 MMT of soybeans annually. The US typically supplies about 15% of the soybeans and about 10% of the meal. The US supplied almost 700,000 MT (38%) of soybeans in 2011/12.

Thailand: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Beginning Stocks	647	818	1,059	802	561
MY Imports	1,943	2,646	1,845	1,693	2,500
Total Supply	2,590	3,464	2,904	2,495	3,061
MY Exports	172	185	202	214	200
Feed and Residual	700	1,300	900	650	1,200
FSI Consumption	900	920	1,000	1,070	1,100
Total Consumption	1,600	2,220	1,900	1,720	2,300
Ending Stocks	818	1,059	802	561	561

Source: USDA PS&D, 2015

## TRINIDAD & TOBAGO



### Market access

The Trinidad market, though small, is highly accessible. Tariffs follow the Caribbean Community's common external tariffs, and are zero except for sorghum (40%), ethanol (TTD 1.32/L, approximately \$0.20/L), and crude and refined soybean oil (40%). The country's value-added tax does not apply to unprocessed foods, soybean oil, or animal feedstuffs.

Trinidad has phytosanitary requirements for unprocessed commodities, requiring phytosanitary certificates and import permits for grain and oilseeds, but these have not been used as a barrier to trade.

Trinidad scored 38 (of 100) on Transparency International's Corruption Index in 2014.

### Grain-oilseed situation

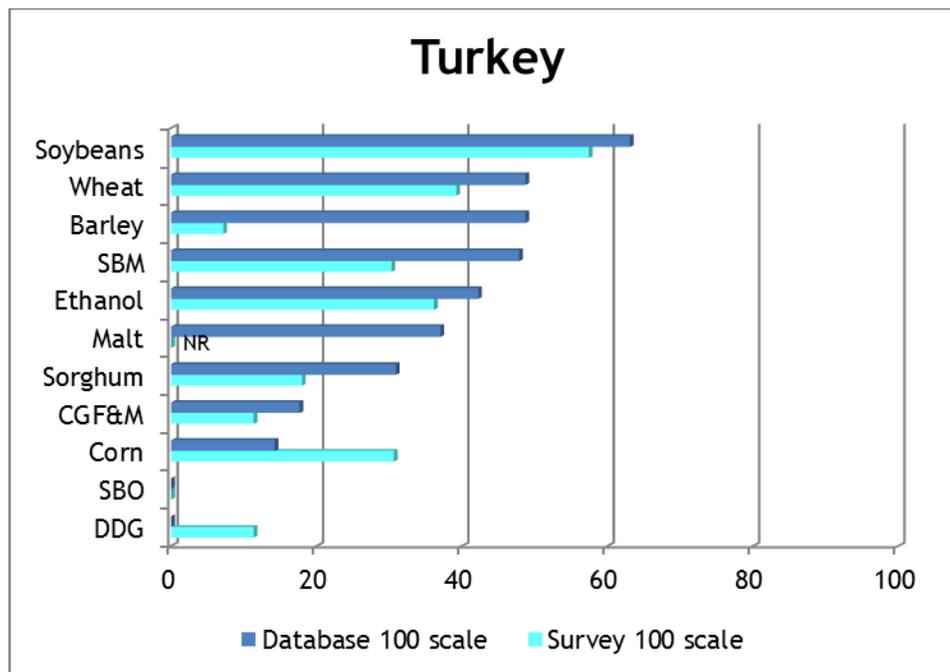
Trinidad and Tobago has a population of 1.2 million; it is not a large market. However, it has a surprisingly vibrant economy and manufactures food and beverage products both for domestic use and for export to other Caribbean counties. There is no significant amount of grain or oilseed production on the islands, so almost all the basic agricultural commodities are imported. The United States is the dominant supplier by far.

The country typically imports about 130,000 MT of wheat, 100,000 MT of corn, 40,000 MT of soybean meal, and 30,000 MT of fats and oils. Most of these goods come from the US.

Trinidad: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Beginning Stocks	5	5	5	5	5
MY Imports	128	140	139	137	135
Total Supply	133	145	144	142	140
MY Exports	0	1	0	0	0
FSI Consumption	128	139	139	137	135
Total Consumption	128	139	139	137	135
Ending Stocks	5	5	5	5	5

Source: USDA PS&D, 2015

## TURKEY



### Market access

Turkey applies the EU's common external tariffs to non-agricultural imports but maintains high tariffs on agricultural imports. Turkey's principal quantitative barriers include TRQs (with preferences to the EU and other countries in the region) and licensing requirements. Tariffs on wheat and corn are very high at 130% but the wheat tariff has been suspended by the Council of Ministers on quota allocations to the Turkish Grain Board.

Turkey's principal technical/procedural barriers include the difficulty of obtaining SPS certifications, testing requirements, corruption, and lack of transparency in the implementation of import policy. For instance, required documents necessary for imports can be subject to changes with little or no prior notification. The Government of Turkey requires a Control Certificate on the majority of food and non-food imports. This is effectively an import license and is granted arbitrarily by the import officials. The certificates are only valid for between four months and a year. The government also requires pre-export inspection for basic commodities.

A new biosafety law passed on March 2010 and was implemented in September 2010. The government's Biosafety Board has approved only 3 soybean events and 16 corn events, and two of the latter approvals have been suspended by Turkey's High Court. The threshold for inadvertent content is only 0.9%, which has created many problems for the trade and fostered stronger anti-GMO sentiment among consumers.

Corruption is still an issue in Turkey. Turkey scored 38 of a possible 100 points on Transparency International's Corruption Index, down from 49 two years ago.

### Grain-oilseed situation

After several years of good crops, production of wheat, barley, and corn fell sharply in 2014. This has required a significant 3.5 MMT increase in imports of the three crops taken together, but nothing of consequence from the United States. The last significant sales of US wheat to Turkey were 361,000 MT shipped in 2012/13.

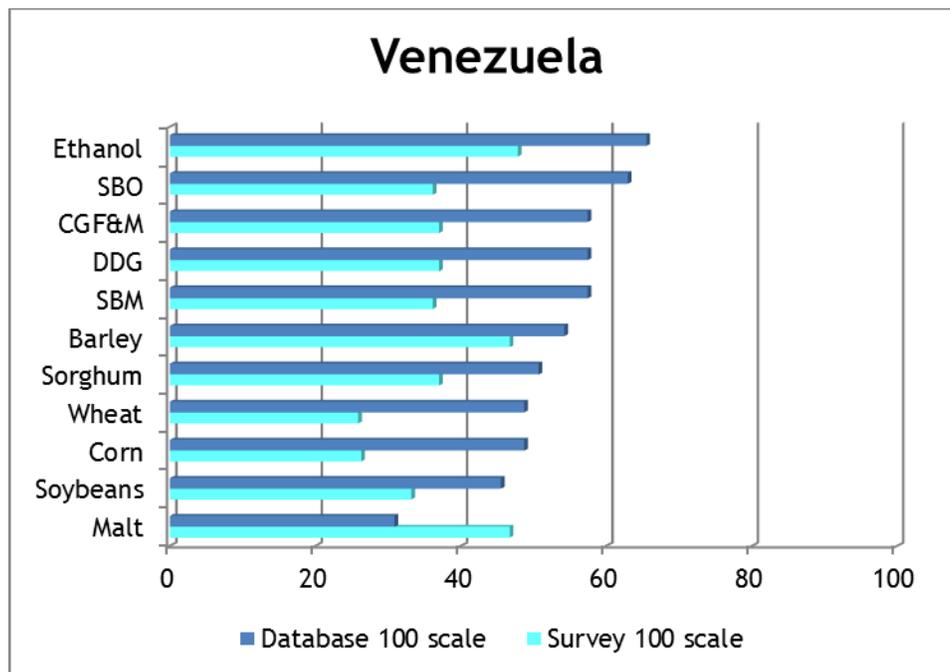
US soybean exports to Turkey have ranged from 235,000 to 928,000 MT over the last five years. Turkey does not produce much but has increased its crush capacity and now imports about 1.8 MMT each year of which the US supplies as much as half. Turkey typically imports 200-300,000 MT of US soybean meal, and annually imports about 300,000 MT of DDG. SBM imports for 2013/14 were 238,000 MT.

Because of the Customs Union with the EU, there are TRQs of 60,000 MT for crude soybean oil from the EU and 2,000 MT for refined soybean oil. There is also a 9,300 MT TRQ for crude Romanian soybean oil.

Turkey: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	8,000	7,700	7,800	7,700	7,710
Yield (mt/ha)	2.13	2.44	2.05	2.44	1.98
Beginning Stocks	2,522	2,885	3,762	2,295	2,889
Production	17,000	18,800	16,000	18,750	15,250
MY Imports	3,677	3,847	3,622	4,035	5,800
Total Supply	23,199	25,532	23,384	25,080	23,939
MY Exports	3,014	3,670	3,439	4,441	3,800
Feed and Residual	800	1,400	850	950	700
FSI Consumption	16,500	16,700	16,800	16,800	16,800
Total Consumption	17,300	18,100	17,650	17,750	17,500
Ending Stocks	2,885	3,762	2,295	2,889	2,639

Source: USDA PS&D, 2015

## VENEZUELA



### Market access

Venezuela is a restricted market because it has foreign exchange controls, requirements for “insufficiency of production” permits, SPS barriers, and corruption (19 on a 100 point scale). Venezuela became of the fifth member of Mercosur when its membership was fully ratified in July 2012. Under the accession terms, Venezuela has four years to adopt the Mercosur Common External Tariff and provide duty free entry on goods from other Mercosur partners.

Fortunately for US exporters, because of Venezuela’s production shortages it needs staple goods, and its geographical proximity to the US makes it an attractive destination for US agricultural commodities. All the commodities except ethyl alcohol are VAT exempt.

### Grain-oilseed situation

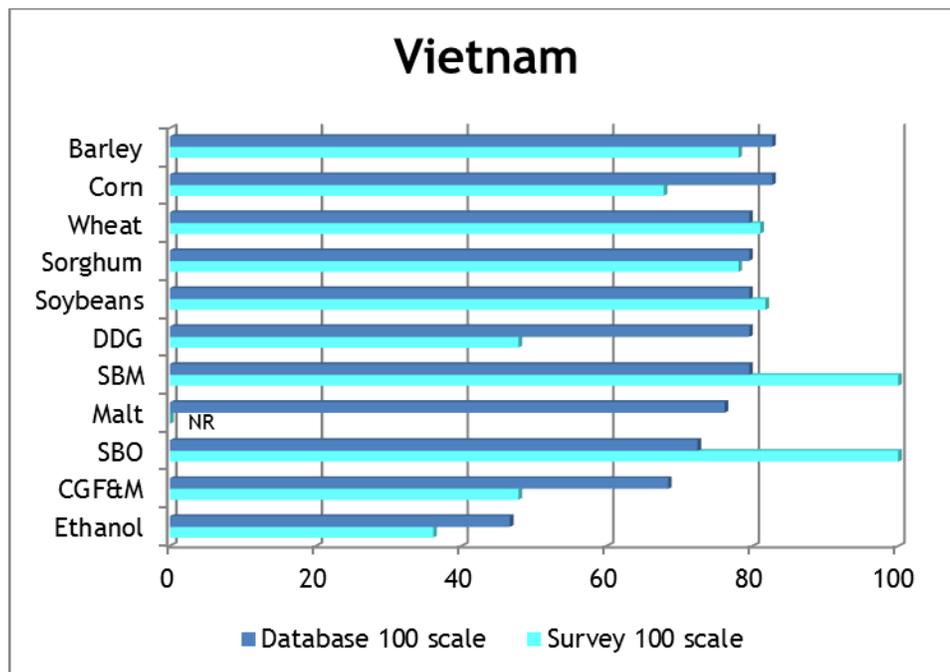
Venezuela does not produce wheat and must import 1.5-1.7 MMT annually to meet demand. In 2013/14, the US exported 686,000 MT of wheat to Venezuela. Venezuela’s annual corn imports exceed 2 MMT; the US supplied 638,000 MT in 2013/14.

Venezuela is not a significant soybean importer, but it imported 400,000 MT of soybean meal in 2013/14, or which slightly over 200,000 MT came from the US.

Venezuela: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Beginning Stocks	115	84	270	332	533
MY Imports	1,469	1,686	1,617	1,951	1,800
Total Supply	1,584	1,770	1,887	2,283	2,333
FSI Consumption	1,500	1,500	1,555	1,750	1,800
Total Consumption	1,500	1,500	1,555	1,750	1,800
Ending Stocks	84	270	332	533	533

Source: USDA PS&D, 2015

## VIETNAM



### Market access

In 2012, the US and Vietnam became participants in the Trans-Pacific Partnership (TPP) negotiations, which aim to establish a broader regional trade agreement across the North American and Asia-Pacific region. The negotiations are expected to conclude in 2015 and this could create a more open trading relationship with Vietnam.

Vietnam's MFN tariffs are 0-5% except for ethanol. But import licensing procedures can be burdensome and importers report that the Vietnamese customs clearance procedures are inconsistent with WTO customs valuation principles.

In August 2014 the government approved four GM corn traits for consumption and authorized one of those for planting in Vietnam. Generally products with GM content over 5% must be labeled. As the rules have become clearer, Vietnam's imports of GM corn, soy, SBM, and DDGS from the US and other predominantly GM producing countries have increased.

Improvements in Vietnam's trade-related infrastructure, such as port facilities, have helped increase not only US corn exports to Vietnam but also other commodities like soybean meal, DDGS, and soybeans. Additional investments and the conclusion of the TPP negotiations should further improve this situation.

Vietnam continues to experience problems related to corruption but has slightly improved since 2009. Vietnam scored a 31 out of a possible 100 points (with 100 being the least corrupt) on

Transparency International's Corruption Perceptions Index. Lower scores on other technical and regulatory barriers offset some of the effects of higher scores on tariff and price measures.

### Grain-oilseed situation

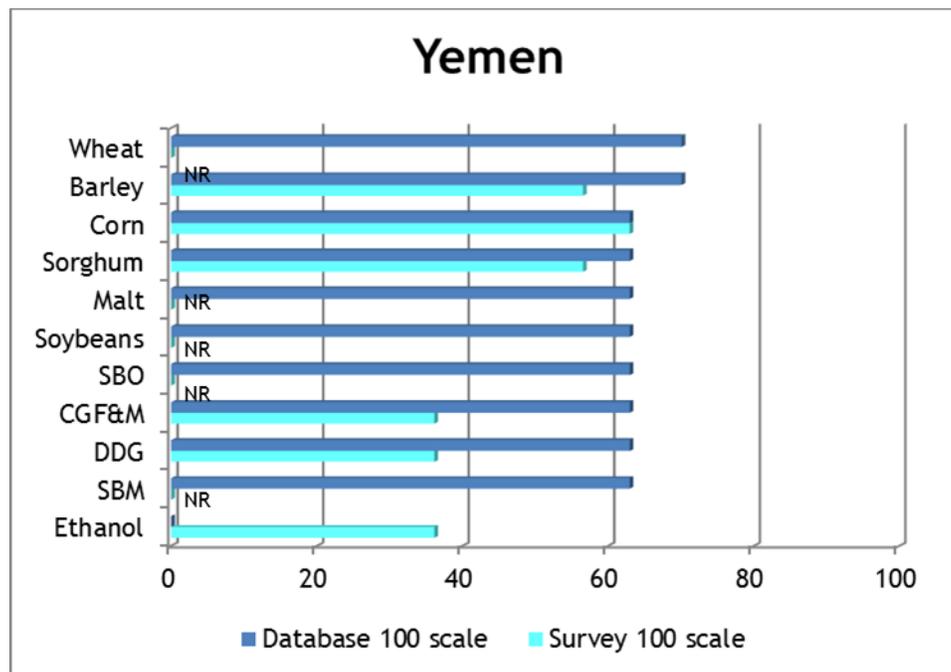
Feed wheat use has declined but food use has increased, so this has maintained imports at more than 2 MMT a year. However, the US supplies less than 10% of that demand. With feed demand growing rapidly in Vietnam, corn imports have begun to surpass the 2 MMT threshold as well. Vietnam import corn primarily from Brazil, Argentina, and India.

Vietnam only produces about 170,000 MT of soybeans and is projected to import 1.5 MMT in 2014/15. Rising domestic crushings have reduced imports of soybean meal and shifted imports to soybeans. The US has about a third of the growing soybean import market and has begun to make inroads on soybean meal as well. In 2014/15, US exports of beans and meal to Vietnam will exceed one million tons.

Vietnam: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Beginning Stocks	313	505	507	264	400
MY Imports	2,459	2,711	1,671	2,158	2,300
Total Supply	2,772	3,216	2,178	2,422	2,700
MY Exports	117	159	164	172	180
Feed and Residual	850	1,100	250	350	500
FSI Consumption	1,300	1,450	1,500	1,500	1,550
Total Consumption	2,150	2,550	1,750	1,850	2,050
Ending Stocks	505	507	264	400	470

Source: USDA PS&D, 2015

## YEMEN



### Market access

Yemen has low tariff rates; however, political instability, corruption, excessive regulations, and the low levels of economic development have always hampered trade prospects. The renewal of civil strife this year has made the situation worse.

Most Yemen tariffs are 5% but corn and soybeans are lower at 4.3% and 4% respectively. In addition, Yemen applies a 5% tax and a 5% additional fee to all imports. Some imports also face a shipping tax of 1-3% and an income tax of 5%. For soybean oil in packages that exceed 150 kg the tax is 10% instead of 5%. The one exception to this complicated tax system is wheat. The government places a high priority on importing cereal crops, especially wheat, and thus has waived the tariff, taxes, and fees on wheat imports.

Yemen is a signatory of the Arab Common Market Free Trade Agreement and as such, provides favorable duties to the member countries.

There are no tariff rate quotas, but import quantities are controlled with import licenses on products and preauthorization requirements on wheat, barley, and corn. Import licenses are valid for one year and may be extended for an additional year.

Corruption is a major problem in Yemen. Competition among government agencies for control over business and investments has created confusing and overlapping jurisdictions, which create opportunities for corruption. Low pay for government officials and inadequate accountability systems also contribute. Vietnam scored only 19 out of a possible 100 points

(with 100 being the least corrupt) on Transparency International's Corruption Perceptions Index.

### Grain-oilseed situation

Limited agricultural resources and a growing population (26 million people) make Yemen dependent on imports. The US is a key exporter of wheat to Yemen. Typically, wheat imports are about 3.3 MMT annually with a third coming from the US. Yemen also imports about 600,000 MT of corn each year, primarily for food use, but none from the US.

Only 500,000 MT of grain and oilseeds are used for animal feed. Therefore, Yemen's livestock product sector is either subsistence based or relies on grazing rather than intensive feeding operations. As such, there is limited demand for oilseed or protein meal imports, and that is primarily for the poultry and egg sector. Yemen imports about 100,000 MT of soybean meal annually, with none coming from the US. Total imports of fats and oils are about 150,000 MT.

Yemen: Wheat (1,000 mt)					
Attribute	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015
Area Harvested (1,000ha)	149	124	138	140	135
Yield (mt/ha)	1.78	1.87	1.81	1.66	1.78
Beginning Stocks	429	502	319	469	452
Production	265	232	250	233	240
MY Imports	2,816	2,685	3,149	3,425	3,300
Total Supply	3,510	3,419	3,718	4,127	3,992
MY Exports	8	0	0	0	0
FSI Consumption	3,000	3,100	3,249	3,675	3,600
Total Consumption	3,000	3,100	3,249	3,675	3,600
Ending Stocks	502	319	469	452	392

Source: USDA PS&D, 2015