CROP SUBSIDIES IN FOREIGN COUNTRIES:
Different Paths to Common Goals
(Updated)

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While every effort has been made to use the latest available information, readers who may have more up-to-date information can email us at Policy_CERI@ttu.edu.

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∗ All of the information presented is from secondary sources, some in the native language of the country. Every effort has been made to accurately interpret and convey the most up-to-date information possible as of May 2011. However, policy tools and implementation mechanisms that countries use are constantly changing. This version of the report is an update of CERI-SR09-02 (April 2009).

EXECUTIVE SUMMARY

This is an update of CERI-SR09-02, our report on international crop policies conducted in April of 2009. Since then, the landscape for agricultural products has undergone changes due to developments related to the use of ethanol and the recent economic recession. Also, in most of the world, both developed economies such as the EU, Australia, and the U.S., and developing countries such as China and Brazil, have increased their domestic agricultural supports and/or altered the types of support. It is uncertain if this increase is permanent or transitory.

U.S. agriculture and its related industries account for about 5% of GDP and about 12% of total U.S. employment. On the world front, the U.S. is a dominant force with more exports of wheat, corn, soybeans, sorghum, and cotton than any other nation. U.S. agriculture is the only sector in the U.S. economy with a trade surplus.

U.S. agriculture has been openly criticized by international organizations and eminent academicians for its subsidies and protection programs. The news media have linked low farm incomes in the developing world to the subsidies and protection given by the U.S. and other industrialized countries to their farming sectors. As a result, an impression has been created that agricultural subsidies and protection are confined to the U.S. and other developed/industrialized nations.

This study refutes these perceptions by presenting information on agricultural subsidies and protection currently applied to seven major crops–corn, cotton, rice, sorghum, soybeans, sugar, and wheat–by a group of 21 countries representing both developing and developed nations. Overall, the study concludes that agriculture has a special status in both developed and developing countries with a wide variety of subsidy and protection instruments in place. Developed countries certainly subsidize and protect their agriculture sectors. But at the same time, developing countries are equally, if not more, prone to protect their agriculture sectors.

Specifically, we find that:

- All countries, both industrialized and developing, support their agriculture sectors, but use vastly divergent policy tools and combinations of tools. Most use guaranteed minimum prices and import tariffs to protect domestic producers.

- Industrialized country governments are moving from price supports toward decoupled direct income payments.

- Developing countries supplement their price support programs with input subsidies, which are excluded from calculations of the Aggregate Measure of Support (AMS) by the World Trade Organization (WTO), but are nonetheless trade distorting.

- Developing countries’ tariff protection is higher than that of industrialized countries.

- The use of sanitary and phytosanitary (SPS) measures to restrict imports are more frequent among developing countries than in developed countries.

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INTRODUCTION

Free competitive markets provide economic efficiency through the allocation of goods and resources within and between countries. Problems with some markets, however, arise from three sources: (1) some markets are not structurally competitive (e.g., monopolies or oligopolies), (2) some goods/services are common property or have externalities associated with them, so that there is no market available for allocation, and (3) societies/governments have goals other than market efficiency. Any of these reasons may provide rationale for interfering with markets.

Virtually all countries, through their governments, interfere with the markets for agricultural products through a public policy framework. The amount and types of interference vary greatly among countries and the tools used to "manage" them include trade protection, input and product subsidies, and a wide variety of price and income support programs. Reasons for this interference include concerns over the inherent price instability in many agricultural markets (arising from the price inelasticity of supply and demand and the impacts of variable weather on supply), national security, environmental quality, and the priority to achieve safe, reliable, low-cost food for urban populations.

Many of these programs share the common goal of raising farm incomes either by increasing farm revenues or by reducing production expenses. One widely used measure of the extent of public transfers to producers is the Producer Support Estimate (%PSE)[1]. There are large differences in the level of support and protection for agriculture across countries and commodities as measured by the %PSE, ranging from 52% in South Korea to 3.3% in South Africa (Figure 1).

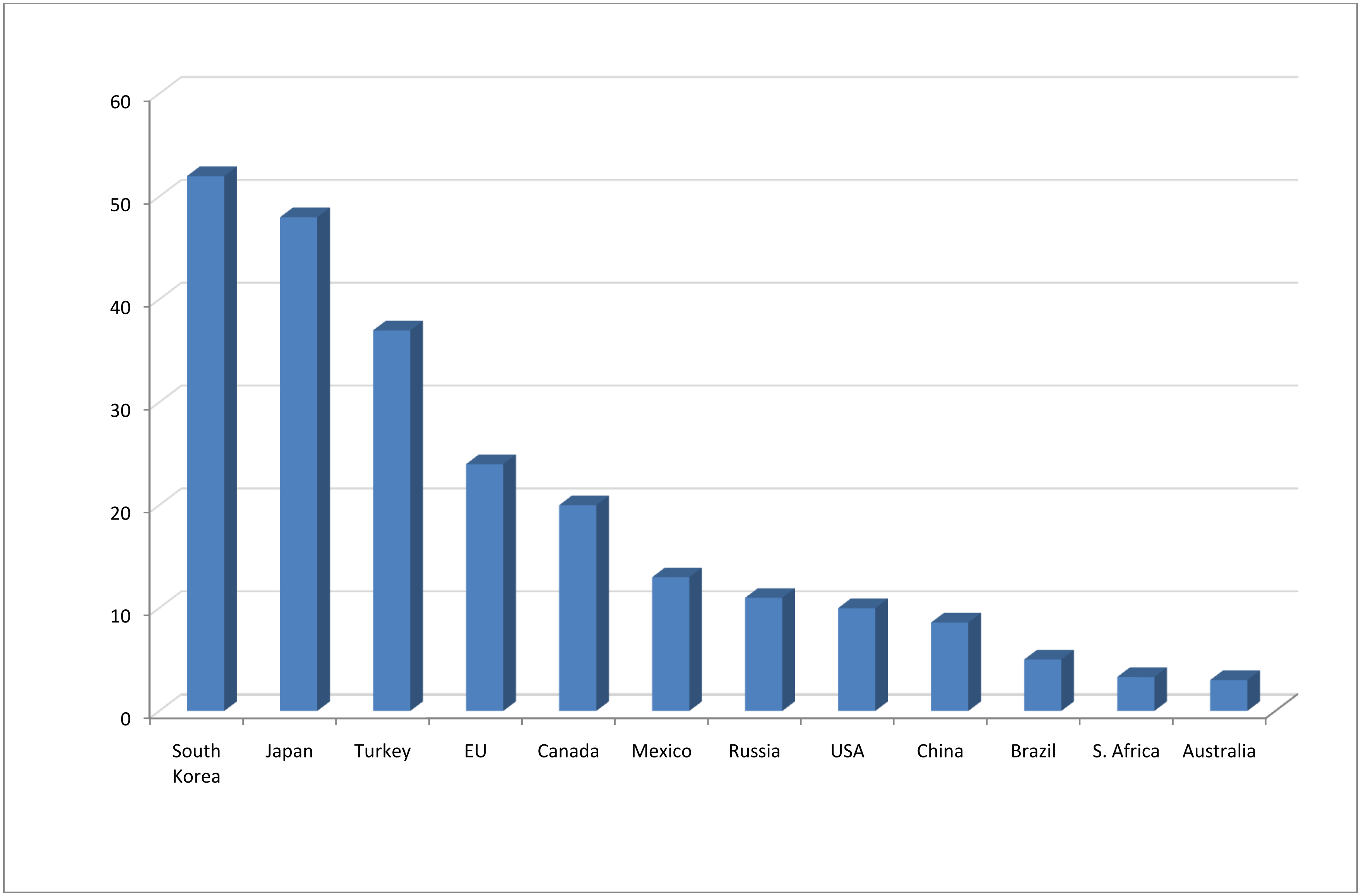
The large difference in the extent of protection is also evident in a simple comparison of tariff rates across countries. As shown in Figure 2, average unweighted applied import tariffs for agriculture in 2009 were as low as 1.3% for Australia and as high as 70.7% for Egypt. The range of protection is even broader in a comparison of World Trade Organization (WTO) sanctioned bound tariff rates (see Figure 3)[2].

The objective of this report is to provide an accurate, comprehensive summary of the policy tools and approaches (price and income support, production subsidies, import and export controls, and payments) used by a group of countries that are important to U.S. agricultural interests either as direct competitors or major trading partners. We focus on seven commodities: corn, cotton, rice, sorghum, soybeans, sugar, and wheat.

[1] % PSE measures the monetary value of all public support to producers (derived from such policies as trade barriers, price supports, commodity programs, commodity specific input subsidies, tax exemptions, etc.) as a percentage of farm receipts.

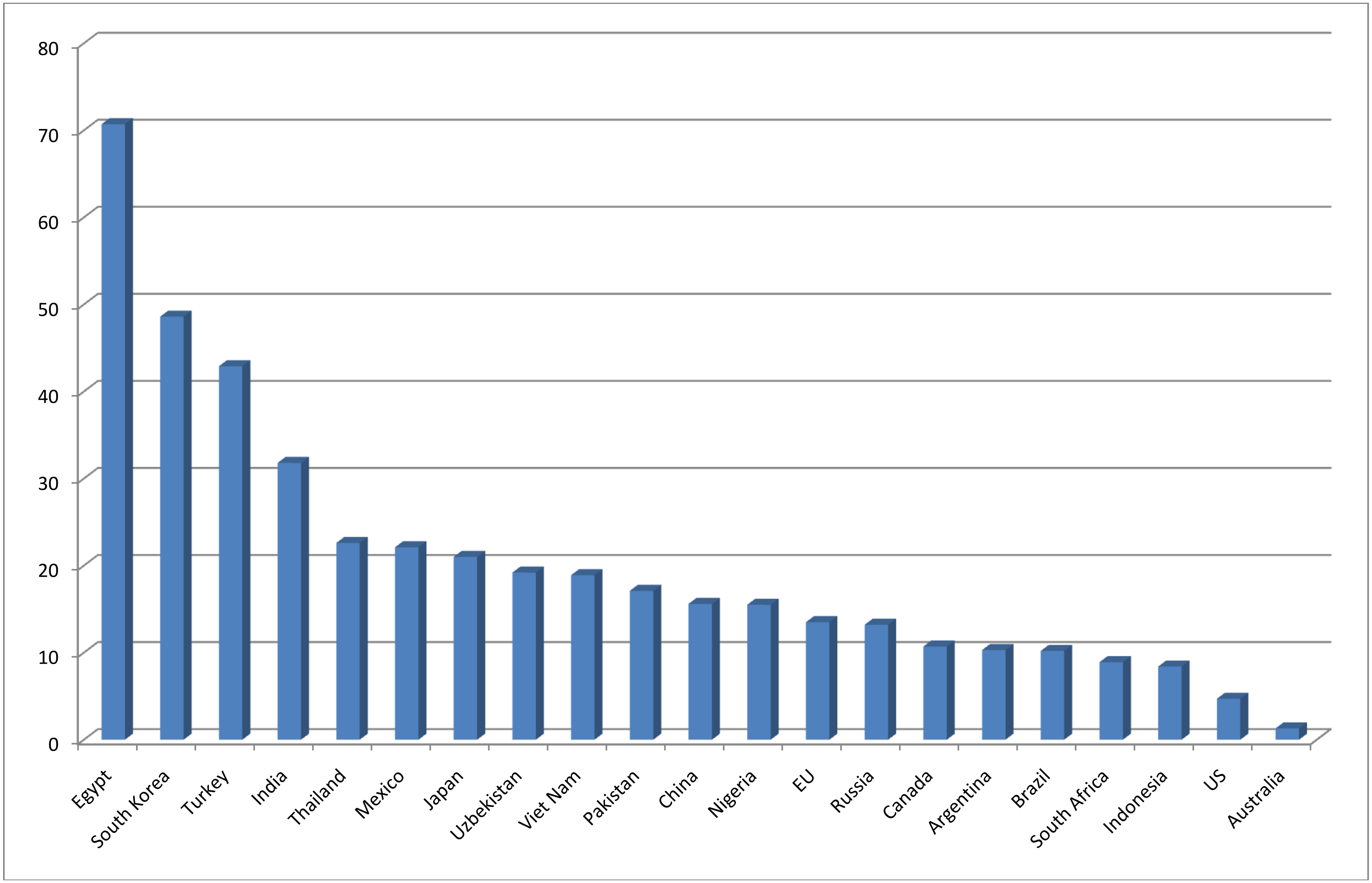
[2] The bound rates are the maximum tariff rates notified by a specific country to the World Trade Organization (WTO). It implies that a country has committed to WTO not to raise tariff rates above their notified rates.

Figure 1. 2009 Producer Support Estimate (%PSE), Select Countries



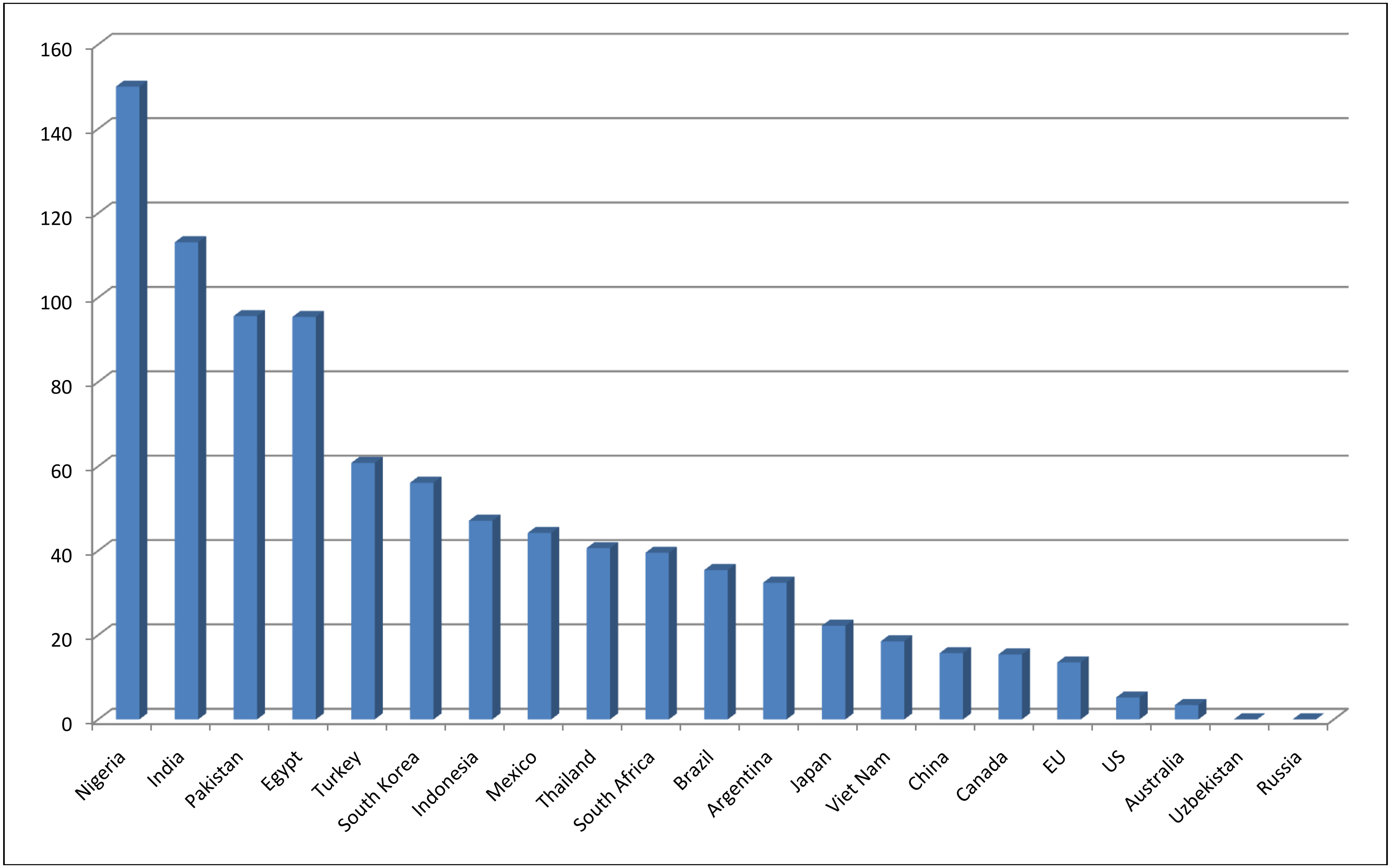
Source: OECD Database, 2011

Figure 2. Average Applied Agricultural Tariffs (%), Select Countries



Source: WTO World Tariff Profiles 2010

Figure 3. Average Bound Agricultural Tariffs (%), Select Countries*



***Turkey (2008)**
Source: WTO World Tariff Profiles 2010

CROP SUBSIDY TABLES

The summary tables for the seven crops (corn, cotton, rice, sorghum, soybeans, sugar, and wheat) are comprised of three sections. The first two, direct support instruments and indirect support instruments, detail some of the ways governments intervene in the agricultural sector. The third section provides production, consumption, and trade shares of each of the countries under consideration. These statistics are an average of the most recent three marketing years.

Direct support includes commodity specific price support programs, direct payments to producers that support whole farm income that are not tied to the production of a specific commodity, and supply control programs aimed at controlling crop production. Import tariffs are further defined into single rate tariffs and two-tier tariffs (tariff rate quota). Major categories of input subsidies are included but not limited to those for fertilizer, irrigation, seed, and electricity and fuel.

Indirect support includes programs or industry structures that impact terms of trade but not necessarily in ways directly linked to producers. State trading refers to state supported single desk commodity trading. Sanitary import controls refer not to whether a nation has a policy to limit the importation of goods under sanitary and phytosanitary (SPS) guidelines, but refers to whether trade in a given commodity to that country is currently restricted due to SPS measures. Long-term investment assistance refers to governmental support given to ancillary industries (e.g., fuel ethanol). Credit subsidies may be a form of input subsidy if they are provided for production agriculture, but they also include credit to support marketing activities by both producers and downstream processors and traders. Transportation and storage subsidies refer to assistance provided to the agricultural industry to manage and subsidize the shipment and handling of commodities as they enter the marketing channel.

Each marker in the crop tables is referenced in the country descriptions that follow in the next section. However, some policy tools have not been reported in the tables. Support for research and development, for example, has not been included because such support is either used in some degree by all countries, is sporadic in application, and/or cannot be separated by commodity. The same holds true for investments that improve a nation's infrastructure.

CORN

	Argentina	Australia	Brazil	Canada	China	Egypt	EU-27	India	Indonesia	Japan
Direct										
Support Price			X				X	X		
Direct Payments				X	X		X			
Import Quota										
Import Tariff		X	X	X	X	X	X	X	X	
Single			√	√		√			√	
Two-Tier (TRQ)					√		√	√		
Export Subsidies					X		X			
Export Taxes	X									
Input Subsidies					X	X		X	X	
Fertilizer					√			√		
Irrigation					√	√		√		
Seed					√			√	√	
Electricity/Fuel					√	√		√		
Indirect										
State Trading					X					
Sanitary Import Controls			X							
Long-Term Investment Assistance				X	X		X	X		
Credit Subsidies			X		X	X		X		
Transport/Storage Subsidies			X		X			X		
Statistics (2008/09 - 2010/11)										
Share of World Production (%)	2	<1	7	1	20	<1	7	2	<1	<1
Share of World Consumption (%)	<1	<1	6	2	20	1	8	2	1	2
Export Market Share (%)	15	<1	10	<1	<1	<1	2	3	<1	<1
Import Market Share (%)	<1	<1	<1	2	1	6	5	<1	1	19

CORN

	Mexico	Nigeria	Pakistan	Russia	South Africa	South Korea	Thailand	Turkey	Uzbekistan	Vietnam	WAC
Direct											
Support Price	X						X	X		X	
Direct Payments	X										
Import Quota		X									
Import Tariff	X				X	X		X		X	
Single					√			√		√	
Two-Tier (TRQ)	√					√					
Export Subsidies											
Export Taxes											
Input Subsidies	X		X	X				X		X	
Fertilizer			√					√		√	
Irrigation			√							√	
Seed			√	√						√	
Electricity/Fuel	√		√	√				√			
Indirect											
State Trading											
Sanitary Import Controls				X	X						
Long-Term Investment Assistance											
Credit Subsidies			X								
Transport/Storage Subsidies	X		X								
Statistics (2008/09 - 2010/11)											
Share of World Production (%)	3	1	<1	<1	2	<1	<1	<1	<1	<1	2
Share of World Consumption (%)	4	1	<1	<1	1	1	<1	<1	<1	<1	2
Export Market Share (%)	<1	<1	<1	<1	2	<1	<1	<1	<1	<1	<1
Import Market Share (%)	10	<1	<1	<1	<1	9	<1	<1	<1	2	<1

COTTON

	Argentina	Australia	Brazil	Canada	China	Egypt	EU-27	India	Indonesia	Japan
Direct										
Support Price	X		X			X	X	X		
Direct Payments					X	X	X			
Supply Control										
Import Quota										
Import Tariff	X	X	X		X			X		
Single	√		√					√		
Two-Tier (TRQ)					√					
Export Subsidies	X									
Export Tax	X									
Input Subsidies	X				X	X		X		
Fertilizer					√			√		
Irrigation					√	√		√		
Seed	√				√	√		√		
Electricity/Fuel	√				√	√		√		
Indirect										
State Trading					X				X	
State Ownership										
Sanitary Import Controls						X				
Long-Term Investment Assistance					X		X	X		
Credit Subsidies			X		X	X		X		
Transport/Storage Subsidies			X		X			X		
Statistics (2008/09 - 2010/11)										
Share of World Production (%)	<1	2	6	<1	31	<1	<1	22	<1	<1
Share of World Consumption (%)	<1	<1	4	<1	40	<1	<1	17	2	<1
Export Market Share (%)	<1	6	7	<1	<1	<1	<1	13	<1	<1
Import Market Share (%)	<1	<1	<1	<1	31	1	<1	2	6	1

COTTON

	Mexico	Nigeria	Pakistan	Russia	South Africa	South Korea	Thailand	Turkey	Uzbekistan	Vietnam	WAC
Direct											
Support Price	X		X					X		X	X
Direct Payments	X										X
Supply Control									X		
Import Tariff											
Support Price		X	X			X					
Single		√	√								
Two-Tier (TRQ)						√					
Export Subsidies		X									
Export Tax											X
Input Subsidies	X		X					X	X		
Fertilizer			√					√	√		
Irrigation			√						√		
Seed			√						√		
Electricity/Fuel	√		√					√			
Indirect											
State Trading			X						X		
State Ownership									X		
Sanitary Import Controls											
Long-Term Investment Assistance											
Credit Subsidies			X						X		
Transport/Storage Subsidies			X								
Statistics (2008/09 - 2010/11)											
Share of World Production (%)	<1	<1	8	<1	<1	<1	<1	2	4	<1	2
Share of World Consumption (%)	2	<1	10	<1	<1	<1	2	5	<1	1	<1
Export Market Share (%)	<1	<1	1	<1	<1	<1	<1	<1	10	<1	6
Import Market Share (%)	4	<1	5	2	<1	3	5	10	<1	4	<1

RICE

	Argentina	Australia	Brazil	Canada	China	Egypt	EU-27	India	Indonesia	Japan
Direct										
Support Price			X		X		X	X	X	
Direct Payments					X		X			X
Import Quota									X	
Import Tariff		X	X	X	X	X	X	X		X
Single		√	√	√		√		√		
Two-Tier (TRQ)					√		√			√
Export Subsidies					X		X			
Export Tax	X									
Input Subsidies					X	X		X	X	
Fertilizer					√			√	√	
Irrigation					√	√		√		
Seed					√			√	√	
Electricity/Fuel					√			√		
Indirect										
State Trading					X					
Sanitary Import Controls									X	
Long-Term Investment Assistance										
Credit Subsidies			X		X	X		X		
Transport/Storage Subsidies			X		X			X		
Statistics (2008/09 - 2010/11)										
Share of World Production (%)	<1	<1	2	<1	31	<1	<1	21	8	2
Share of World Consumption (%)	<1	<1	2	<1	31	<1	<1	20	9	2
Export Market Share (%)	2	<1	2	<1	2	1	<1	7	<1	<1
Import Market Share (%)	<1	<1	2	1	1	<1	5	<1	4	2

RICE

	Mexico	Nigeria	Pakistan	Russia	South Africa	South Korea	Thailand	Turkey	Uzbekistan	Vietnam	WAC
Direct											
Support Price	X		X			X	X	X		X	
Direct Payments	X					X					
Import Quota											
Import Tariff		X	X	X		X		X			X
Single		√	√	√							
Two-Tier (TRQ)						√		√			√
Export Subsidies										X	
Export Taxes											
Input Subsidies	X	X	X	X			X			X	X
Fertilizer		√	√				√			√	
Irrigation			√							√	√
Seed		√	√	√			√			√	
Electricity/Fuel	√		√	√							
Indirect											
State Trading			X				X			X	
Sanitary Import Controls				X							X
Long-Term Investment Assistance			X								
Credit Subsidies			X				X			X	
Transport/Storage Subsidies							X				
Statistics (2008/09 - 2010/11)											
Share of World Production (%)	<1	<1	1	<1	<1	1	5	<1	<1	6	2
Share of World Consumption (%)	<1	1	<1	<1	<1	1	2	<1	<1	4	3
Export Market Share (%)	<1	<1	11	<1	<1	<1	31	<1	<1	20	<1
Import Market Share (%)	2	6	<1	<1	3	1	1	1	<1	2	19

SORGHUM

	Argentina	Australia	Brazil	Canada	China	Egypt	EU-27	India	Indonesia	Japan
Direct										
Support Price			X				X	X		
Direct Payments				X	X		X			
Import Quota										
Import Tariff		X				X	X			
Single						√	√			
Two-Tier (TRQ)										
Export Subsidies										
Export Taxes	X									
Input Subsidies								X		
Fertilizer								√		
Irrigation								√		
Seed								√		
Electricity/Fuel								√		
Indirect										
State Trading										
Sanitary Import Controls										
Long-Term Investment Assistance										
Credit Subsidies			X					X		
Transport/Storage Subsidies			X					X		
Statistics (2008/09 - 2010/11)										
Share of World Production (%)	5	4	3	<1	3	1	<1	11	<1	<1
Share of World Consumption (%)	3	2	3	<1	3	1	2	11	<1	3
Export Market Share (%)	22	14	<1	<1	<1	<1	<1	1	<1	<1
Import Market Share (%)	<1	<1	<1	<1	<1	<1	6	<1	<1	26

SORGHUM

	Mexico	Nigeria	Pakistan	Russia	South Africa	South Korea	Thailand	Turkey	Uzbekistan	Vietnam	WAC
Direct											
Support Price	X										
Direct Payments	X										
Import Quota		X									
Import Tariff				X			X				
Single				√			√				
Two-Tier (TRQ)											
Export Subsidies											
Export Taxes											
Input Subsidies	X		X								
Fertilizer											
Irrigation											
Seed			√								
Electricity/Fuel	√		√								
Indirect											
State Trading											
Sanitary Import Controls											
Long-Term Investment Assistance											
Credit Subsidies											
Transport/Storage Subsidies											
Statistics (2008/09 - 2010/11)											
Share of World Production (%)	11	18	<1	<1	<1	<1	<1	<1	<1	<1	26
Share of World Consumption (%)	15	18	<1	<1	<1	<1	<1	<1	<1	<1	26
Export Market Share (%)	<1	<1	<1	<1	<1	<1	<1	<1	<1	<1	<1
Import Market Share (%)	40	<1	<1	<1	<1	<1	<1	<1	<1	<1	<1

SOYBEANS (OILSEEDS)

	Argentina	Australia	Brazil	Canada	China	Egypt	EU-27	India	Indonesia	Japan
Direct										
Support Price			X					X		
Direct Payments				X	X		X			X
Import Quota										
Import Tariff		X	X		X	X		X	X	
Single			√		√	√		√	√	
Two-Tier (TRQ)										
Export Subsidies										
Export Tax	X									
Input Subsidies					X	X		X		
Fertilizer					√			√		
Irrigation					√	√		√		
Seed					√			√		
Electricity/Fuel					√			√		
Indirect										
State Trading					X					
Sanitary Import Controls								X		
Long-Term Investment Assistance				X			X			
Credit Subsidies			X		X	X		X		
Transport/Storage Subsidies			X		X			X		
Statistics (2008/09 - 2010/11)										
Share of World Production (%)	18	<1	27	2	6	<1	<1	4	<1	<1
Share of World Consumption (%)	15	<1	15	<1	25	<1	6	4	1	2
Export Market Share (%)	11	<1	34	3	<1	<1	<1	<1	<1	<1
Import Market Share (%)	<1	<1	<1	<1	57	2	15	<1	2	4

SOYBEANS

	Mexico	Nigeria	Pakistan	Russia	South Africa	South Korea	Thailand	Turkey	Uzbekistan	Vietnam	WAC
Direct											
Support Price	X						X	X			
Direct Payments	X										
Import Quota											
Import Tariff		X	X		X	X	X	X	X	X	X
Single		√	√		√			√	√	√	√
Two-Tier (TRQ)						√	√				
Export Subsidies											
Export Taxes											
Input Subsidies	X			X				X			
Fertilizer								√			
Irrigation											
Seed				√							
Electricity/Fuel	√			√				√			
Indirect											
State Trading											
Sanitary Import Controls				X							
Long-Term Investment Assistance											
Credit Subsidies											
Transport/Storage Subsidies											
Statistics (2008/09 - 2010/11)											
Share of World Production (%)	<1	<1	<1	<1	<1	<1	<1	<1	<1	<1	<1
Share of World Consumption (%)	2	<1	<1	<1	<1	<1	<1	<1	<1	<1	<1
Export Market Share (%)	<1	<1	<1	<1	<1	<1	<1	<1	<1	<1	<1
Import Market Share (%)	4	<1	<1	1	<1	1	2	2	<1	<1	<1

SUGAR

	Argentina	Australia	Brazil	Canada	China	Egypt	EU-27	India	Indonesia	Japan
Direct										
Support Price					X	X	X	X	X	X
Direct Payments				X	X		X			
Supply Control							X			
Import Quota									X	
Import Tariff		X	X	X	X	X	X	X		
Single			√	√		√		√		
Two-Tier (TRQ)					√		√			
Export Subsidies							X			
Export Taxes										
Input Subsidies					X	X		X		
Fertilizer					√			√		
Irrigation					√	√		√		
Seed					√			√		
Electricity/Fuel					√			√		
Indirect										
State Trading					X					
Sanitary Import Controls										
Long-Term Investment Assistance			X					X		
Credit Subsidies			X		X			X		
Transport/Storage Subsidies			X		X			X		
Statistics (2008/09 - 2010/11)										
Share of World Production (%)	2	3	23	<1	8	1	10	13	1	<1
Share of World Consumption (%)	1	<1	8	<1	10	2	11*	16	3	2
Export Market Share (%)	1	7	48	<1	<1	<1	3**	<1	<1	<1
Import Market Share (%)	<1	<1	<1	3	3	2	6***	5	5	3

*EU-30
**EU-29
***EU-28

SUGAR

	Mexico	Nigeria	Pakistan	Russia	South Africa	South Korea	Thailand	Turkey	Uzbekistan	Vietnam	WAC
Direct											
Support Price	X		X				X	X			
Direct Payments											
Supply Control								X			
Import Quota											
Import Tariff	X	X	X	X	X	X	X	X			X
Single		√	√		√	√		√			√
Two-Tier (TRQ)	√			√			√				
Export Subsidies											
Export Taxes											
Input Subsidies	X		X	X						X	
Fertilizer			√							√	
Irrigation			√							√	
Seed			√	√						√	
Electricity/Fuel	√		√	√							
Indirect											
State Trading			X		X						
Sanitary Import Controls		X									
Long-Term Investment Assistance			X				X				
Credit Subsidies	X		X							X	
Transport/Storage Subsidies			X								
Statistics (2008/09 - 2010/11)											
Share of World Production (%)	4	<1	2	2	2	<1	5	2	<1	<1	<1
Share of World Consumption (%)	3	<1	3	4	1	<1	1	2	<1	<1	2
Export Market Share (%)	2	<1	<1	<1	2	<1	10	<1	<1	<1	<1
Import Market Share (%)	<1	3	2	5	<1	3	<1	<1	1	1	5

WHEAT

	Argentina	Australia	Brazil	Canada	China	Egypt	EU-27	India	Indonesia	Japan
Direct										
Support Price			X		X	X	X	X		
Direct Payments				X	X		X			X
Supply Control										
Import Quota										
Import Tariff			X	X	X	X	X	X	X	X
Single			√			√		√	√	
Two-Tier (TRQ)				√	√		√			√
Export Subsidies			X		X		X			
Export Taxes	X									
Input Subsidies					X	X		X		
Fertilizer					√			√		
Irrigation					√	√		√		
Seed					√			√		`
Electricity/Fuel					√			√		
Indirect										
State Trading		X		X	X			X		X
State Ownership										
Sanitary Import Controls			X							
Long-Term Investment Assistance				X						
Credit Subsidies			X		X			X		
Transport/Storage Subsidies			X		X			X		
Statistics (2008/09 - 2010/11)										
Share of World Production (%)	2	3	<1	4	17	1	21	12	<1	<1
Share of World Consumption (%)	<1	1	2	1	17	3	19	12	<1	<1
Export Market Share (%)	5	11	<1	14	<1	<1	17	<1	<1	<1
Import Market Share (%)	<1	<1	5	<1	<1	8	5	<1	4	4

WHEAT

	Mexico	Nigeria	Pakistan	Russia	South Africa	South Korea	Thailand	Turkey	Uzbekistan	Vietnam	WAC
Direct											
Support Price	X		X	X				X			
Direct Payments	X										
Supply Control									X		
Import Quota								X			
Import Tariff		X		X	X	X					X
Single		√		√	√						√
Two-Tier (TRQ)						√					
Export Subsidies											
Export Taxes											
Input Subsidies	X		X	X				X			
Fertilizer			√					√			
Irrigation			√								
Seed			√	√							
Electricity/Fuel	√		√	√				√			
Indirect											
State Trading			X						X		
State Ownership									X		
Sanitary Import Controls											
Long-Term Investment Assistance				X							
Credit Subsidies			X								
Transport/Storage Subsidies			X								
Statistics (2008/09 - 2010/11)											
Share of World Production (%)	<1	<1	3	8	<1	<1	<1	3	<1	<1	<1
Share of World Consumption (%)	<1	<1	4	7	<1	<1	<1	3	1	<1	<1
Export Market Share (%)	<1	<1	<1	10	<1	<1	<1	2	<1	<1	<1
Import Market Share (%)	3	3	<1	<1	1	3	1	3	1	1	5

COUNTRY SUMMARIES

Following is a country by country description for each marker in the crop tables. In most cases we also provide a brief overview of the general policies each nation uses in supporting its agricultural sector. The primary focus of this report is on agricultural support mechanisms. Generally these serve to boost farm income through higher incomes or reduced costs.

All foreign currencies have been converted to U.S. dollars ($). We also convert support prices for sugar cane into their raw sugar equivalent using Commercial Cane Sugar content (CCS) of 13%.

Careful consideration should be given when comparing seed cotton support prices to cotton support expressed in pounds of cotton lint. In cases where cotton price supports were reported in terms of domestic price per unit of seed cotton, we assumed a ginning ratio of 33% and converted the support to dollars per pound of lint. However, when comparing lint equivalent support prices between countries, it is important to note differences in cotton production and marketing systems. In countries that offer price support payments or a guaranteed price on a seed cotton basis (e.g., the West African countries), producers do not incur ginning costs or receive cottonseed revenue. In other cases where producers are guaranteed a minimum price on cotton lint (e.g., the U.S.), producers bear the cost of cotton ginning and sell their own seed. Using U.S. average production costs and returns, ginning charges less cottonseed revenue add about $0.04/lb of lint to the cost of producing cotton in the United States that producers in other nations may not have to bear[3]. Therefore, a simple comparison of lint equivalent prices may not reveal the actual level of net governmental support for cotton producers. Accurate comparisons must account for differences in production costs producers must pay as well as the prices received.

[3] For 2009, ginning cost was $101.64/ac, cottonseed revenue was $80.16/ac, and the total gross value of cotton production (excluding government payments) was $433.56/ac. Calculations were made using the national average cotton yield in 2009 of 620 pounds of lint/ac (NCC, 2011).

ARGENTINA

Historically, the agricultural sector in Argentina has received little direct government support. Policies in the export-oriented agricultural sector were shaped by an unstable macroeconomic environment, trade restrictions on agricultural inputs and outputs, and government policies favoring industrial development and cheap supply of food to urban consumers. In 1990, Argentina enacted economic reforms that began to stabilize the economy and created an environment more favorable to agricultural investment, production, and exports. However, the government still collects export taxes on grains, cotton, and other agricultural products, dependent on their level of processing.

Corn and Wheat

- Policies for wheat and corn are primarily aimed at maintaining sufficient domestic supplies at reduced prices through (a) domestic subsidies, (b) export taxes, and (c) controls on export licenses. There is also a subsidy program in place for small and medium producers that allow for a rebate of export taxes paid.
- Wheat and corn mills are given a monthly subsidy for the volume of wheat sold in the domestic market (subject to a maximum volume per mill established by the Group of Coordination and Evaluation of Subsidies for Internal Commerce (USESCI), formerly the National Office of Agricultural Trade Control (ONCCA)). The subsidy is the value per metric ton based on the difference between the theoretical FAS price (TFP) published by the Ministry of Agriculture (or price supposedly paid by millers to corn and wheat farmers) and the "supply price" published by the Secretariat of Domestic Trade.
- Small- and medium-sized farmers (up to 800 MT of wheat and up to 1240 MT of corn production levels) are rebated the difference between the FOB official price and the TFP published daily by the Ministry of Agriculture.
- The USESCI issues and regulates export licenses (ROEs) in the grain and beef sectors. Exporters have 45 days to from the date of the export license request to notify the Argentine Customs Office the destination of the shipment. If within 5 days after the license is approved, the exporter pays the export tax, the destination notification period is extended to 365 days.
- The current export taxes on corn and wheat are 20% and 23%, respectively. Flour carries a 13% export tax while flour sub-products (pasta and couscous) are exacted a 5% export tax.
- The current import tariff on wheat and corn are 10% and 8%, respectively. The import tariff on flour is 12% and 16% for its sub-products.

Cotton

- 5% export tax for cotton.
- Producers with 5 to 20 ha (12 to 50 ac) of cotton receive some support from the provincial or county governments.
  - Seed, fuel, or mechanical labor is supplied; repayment requirements are normally forgiven.
  - Some provincial governments purchase raw cotton from small producers at higher than market prices, thus establishing a minimum price.
- The import tariff for cotton from non-MERCOSUR (Southern Common Markets) countries is 6%.

Rice

- The current export tax on milled and brown rice is 5% and 10% on paddy and broken rice.
- The import tariff on milled rice is 12% and 10% on paddy, brown and broken rice.

Soybeans

- Over 95% of Argentina's soybean production is exported, either as beans, oil, or meal.
- Export taxes on soybeans are as follows: soybeans (35%) and soybean oil/meal (32%).

Sorghum

- The current export tax on sorghum is 20%.
- The current import tariff on sorghum is 8%.

Sugar

- Consistent with grains and other commodities, sugar exports now have to be approved by the government (beginning MY 2011/12) based on how well the domestic market is supplied.

AUSTRALIA

Australia removed most forms of commodity-specific agricultural assistance in the mid-1980s. To date, agricultural producers in Australia (predominantly export-oriented) rely mainly on world market signals in their production decisions.

Recent sectoral policy developments have focused largely on drought relief, water and land management, biodiversity, and climate change. The average level of applied MFN tariff protection for the sector (excluding forestry) remained stable and negligible, at 1.4 %, compared with 4.2% for manufacturing. A few sensitive items such as cheese, certain vegetables, certain oils and fats continue to receive tariff protection. Exports and/or production of certain dairy, grain, horticulture, livestock, and wines/grapes continue to be subject to levies earmarked mainly for R&D (WTO, 2011).

Single-desk arrangements continue to affect rice exports although similar statutory arrangements for grains, wheat, and sugar were recently dismantled (although entities operating them remain in place). Despite a wide range of assistance programs, the agricultural sector's overall level of support, as measured by different indicators, has remained low, equivalent to 0.1% of GDP, and the majority of this assistance was delivered in the form of non-trade distorting (Green Box) budgetary outlays rather than tax incentives; both product-specific and non-product specific AMS were within Australia's *de minimis* WTO commitments (WTO, 2011).

Corn and Sorghum

- The Australian corn and sorghum industries have historically played a minor role in the overall grain market. However, demand from intensive livestock industries has prompted growth in these sectors.
- WTO bound import tariff levels: sorghum−1%, corn−1%.

Cotton

- The Australian cotton industry relies heavily on exports, with over 90% of production sold on the world market.
- WTO bound import tariff level: cotton, carded−1.5%.
- The Western Australia State Government has lifted the moratorium on the commercial production of GM cotton at the Ord River Irrigation Area in the North. More than 90% of Australia’s cotton production is already GM.
- Cotton has benefited from the recent sharp devaluation of the Australian dollar.

Rice

- Rice is the sole item subject to single-desk arrangements exempt from competition policy provisions.
- As of 2008, the marketing of bulk wheat exports was effectively deregulated.
- WTO bound import tariff level: unmilled−1%, milled−1%.

Soybeans

- Soybeans are produced in small quantities in Australia. Approximately 70 to 75 kilotonnes (2.6 to 2.8 million bu) are produced annually.
- WTO bound tariff level for soybeans is 1% as of 2009.

Sugar

- Raw sugar is consistently one of Australia's leading farm export commodities, exporting around 80% of total production.
- The Queensland Sugar Limited (QSL) authorization to negotiate commercial export contractual arrangements with milling companies and cooperatives expired on September 30, 2009.
- There is no import duty on cane sugar while other sweeteners such as maple sugar, fructose, and syrups thereof have rates of 4% and 5%.

Wheat

- Australia accounts for about 3% of world production of wheat, exports 70% of its crop that accounts for 12% of world trade.
- In 2008, marketing of bulk wheat exports was deregulated by removing the long-standing single-desk trading arrangement where the AWB (International) Limited had sole exporter rights
- Beginning July 2008, traders seeking to export bulk wheat require accreditation from the Wheat Exports Australia (WEA) mandated by the Wheat Export Marketing Act of 2008 to administer the Wheat Accreditation Scheme 2008.

BRAZIL

The removal of taxes, tariffs, and other trade restrictions in the early 1990s fueled rapid growth in the Brazilian agricultural sector. Agriculture and allied industries accounts for 40% of Brazilian total exports and virtually all of a $34 billion trade surplus. Much of Brazil's support is in the form of subsidized credit.

Apart from subsidized credit, there are other government programs that support agriculture. The *Premio para Escoamento do Produto* (PEP) program provides a premium for commercial buyers of agricultural commodities that allow such buyers to then sell the products at a lower price. The PEP program has been used to lower the cost of internal transportation of cotton and as an export subsidy for Brazilian wheat. Commercial buyers purchase wheat from producers at the minimum price and receive government subsidies to be able to sell wheat on the world market at a lower price. In addition, the *Aquisicao do Governo Federal* (AGF) program allows the government to acquire agricultural products at the minimum price when the market price is below the minimum; it allows the government to acquire products at market prices to build strategic stocks. Also, the *Premio Equalizador Pago ao Produtor* (PEPRO) program grants a premium to the farmer or cooperative which sells its products at public auction, where the government pays the difference between the Reference Value established by the government and the value of the premium (maximum value paid by the government as guarantee of the Reference Value). Furthermore, the *Premio de Risco para Acquisicao de Produto Agricola Oriundo de Contrato Privado de Opcao de Venda* (PROP) is a subsidy program granted in the form of a public auction for the consumer to acquire, at a future date, a determined product directly from the producer at a pre-fixed rate, utilizing a private contract for the option to sell.

The government of Brazil also occasionally arranges for rural debt restructuring for rural producers through transfer of outstanding debt holdings from public/private institutions into Active Union Debt (DAU) of the National Treasury (the repayment terms of which are renegotiated periodically); renegotiation of outstanding loans is backed by government "equalization" payments to offset newly assumed risks for financial institutions; and debt forgiveness to subsistence/small family operations.

The 2010/11 Agriculture and Livestock Plan (PAP) allocates R$ 116 billion (US$ 64 billion) to finance production costs, marketing and investment for the October 2010 to September 2011 crop year. At the same time, the PAP maintains the subsidized interest rates of 6.75% and even lower at 6.25% for middle-class producers. Also, a new line of credit exclusively for middle-class farmers (PRONAMP) whose annual income is less than R$ 500,000 was created. The government of Brazil has also recently offered agricultural debt renegotiation to producers on investment loans held by public or private institutions and on outstanding DAU held by the Federal Treasury.

The Low Carbon Agriculture Program (ABC) was also created and funded with R$ 2 billion under the PAP aimed at recovering 15 million hectares of degraded land and reducing CO_2 emissions by 176 million tons by 2020.

Brazil is also the world leader in biofuel production and exports. The central component of Brazil's ethanol policy is a mandate that requires a 20-25% ethanol blend in gasoline. Other governmental policies that support the ethanol industry are storage credits to millers, preferential tax treatment, and ethanol import restrictions. In 2005, a biodiesel mandate was established that provided financing and tax incentives for biodiesel production as well.

Corn and Sorghum

- Corn is the most important grain crop grown in Brazil. Demand is driven mostly by an expanding domestic livestock industry.
- The government minimum price for corn is R$13.05/60 kg (US$7.47/60 kg).
- Basic minimum price for sorghum ranges from R$9.80/60kg to R$11.20/60kg ($1.93/bu to $2.21/bu).
- WTO bound import tariff for corn is 48.3%.

Cotton

- The 2010/11 minimum support price for cotton is R$ 44.6/15 kg ($ 0.75/lb).
- The government temporarily reduced the cotton import tariff from 10% to 0% for up to 250,000 MT between October 2010 and May 2011.
- When government payments to cotton producers were usually made out of the following programs: AGF, PEP, PROP, and PEPRO, no payment was made in 2010 due to high market prices:

Government Support for the Commercialization of Cotton ('000 MT)

Program	2005	2006	2007	2008	2009	2010
Acquisition	4.5	0	1.1	0	0	0
(AGF)	136.5	1.8	0	0	0	0
PEP	272.2	0	0	0	0	0
PROP	0	461.5	428.9	1023.6	792.2	0
PEPRO						
Total	413.2	463.3	730.0	1023.6	792.2	0
Production	1298.7	1037.8	1524	1602.2	1213.7	1194.1
Participation (%)	31.8	44.6	47.9	63.9	65.3	0

Source: GAIN Report BR0706

Rice

- Producer support estimates for rice are higher than any other agricultural product in Brazil.
- Basic minimum support price for long rice ranges from R$10.12/60 kg to R$20.70/60kg ($3.57/cwt to $7.30/cwt).
- WTO bound import tariff for rice is 55%.

Soybeans

- Brazil is the world's second largest producer of soybeans and rivals the United States as the world's leading exporter.
- In the south of Brazil, where 38% percent of the soybean area is located, producers are eligible for federal subsidized loans.
- Basic minimum support price for soybeans ranges from R$13/60kg to R$14/60kg ($2.78 to $2.99/bu).
- Brazil's import tariff on soybeans of 8% is consistent with MERCOSUR's Common External Tariff schedule (MERCOSUR is a trading block of South American countries that includes Argentina, Brazil, Paraguay, Uruguay, and Venezuela).
- Brazil uses emergency assistance; in 2007 R$14 billion (about $6 billion) of emergency assistance was provided to soybean producers--R$5.7 billion ($2.5 billion) for marketing support; R$7.2 billion ($3.2 billion) in rollover debt restructuring; and R$1 billion ($0.4 billion) in price support.
- The biotechnology adoption rate for genetically engineered soybeans reached nearly 80 percent in 2010/11.

Sugar

- Brazil is the world's leading producer of sugarcane, sugar, and ethanol. The government's policy regarding the production and use of ethanol appears to have the greatest impact on the sugar situation.
- WTO bound tariff for raw and refined sugar is 35%.

Wheat

- Brazil is one of the world's leading importers of wheat, with over 95% of imports coming from Argentina.
- Phytosanitary restrictions are used to prevent imports of wheat, specifically from the U.S. and Ukraine.
- Basic minimum support price for wheat ranges from R$330.88/MT to R$426.75/MT ($196/MT to $253/MT).

- WTO bound import tariff for wheat is 55%. The applied rate is 10% for wheat imported from non-MERCOSUR countries. Wheat is traded duty free within MERCOSUR.

CANADA

The government of Canada has various programs in place available to the agricultural sector.

The AgriStability program provides support during periods of large margin declines. Farmers or businesses receive an AgriStability payment when their current year program margin (allowable income minus your allowable expenses in a given year, with adjustments for changes in receivables, payables and inventory) falls below 85% of your reference margin (average program margin for three of the past five years with the lowest and highest margins dropped from the calculation).

AgriInvest accounts are also available to manage small income declines, and provide support for investments to mitigate risks or improve market income. Farmers make annual deposits in an AgriInvest account based on a percentage of allowable net sales and receive matching contributions from federal, provincial, and territorial governments.

The AgriProcessing Initiative (API) provides support to existing processing companies for agri-processing projects that involve the adoption of innovative and new-to-company manufacturing technologies and processes that are essential to sustaining and improving the sector's position in today's global marketplace.

The Canadian Agricultural Loans Act (CALA) program is a financial loan guarantee program that gives farmers easier access to credit. Farmers can use these loans to establish, improve, and develop farms; while agricultural cooperatives may also access loans to process, distribute, or market the products of farming. Under the CALA, the federal government guarantees repayment of 95% of the loan to the lender, provided that the requirements of the Act and the Regulations have been fulfilled. Loans are limited to a maximum of $500,000 for land and the construction or improvement of buildings, and $350,000 for all other loan purposes. The maximum aggregate loan limit for any one borrower is $500,000. The maximum aggregate loan limit for agricultural cooperatives is $3 M, with the Minister's approval. The maximum amount eligible for consolidation/refinancing is the total of the outstanding principal balances of the loans to be consolidated/refinanced, to a maximum of $350,000.

The Price Pooling Program (PPP) provides a price guarantee that protects marketing agencies and producers against unanticipated declines in the market price of their products. Under the PPP, the Minister of Agriculture and Agri-Food Canada enters into an agreement with a marketing agency (associations of producers, processor or selling agent) for the marketing of agricultural products under a cooperative plan. The agreement provides a price guarantee for products delivered, enables the marketing agency to make an initial payment to the producers for products delivered and covers eligible storing, processing, carrying and selling costs of the marketing agency, to a fixed maximum. The price guarantee is set at a percentage of the expected average wholesale price of the product.

The agreement covers the production of an agricultural product for a crop year. Once all of the agricultural product is sold, the actual average wholesale price received by the marketing agency is determined. If the calculated value is less than the guarantee value (the initial payment plus the eligible costs), the program allows for a payment for the shortfall by the Government of Canada. If the calculated value is greater, the surplus is retained by the pool for future use or is distributed by the marketing agency to the producers according to the grade, variety and type of the product that they delivered to the pool.

AgriInsurance is a federal-provincial-producer cost-shared program that stabilizes a producer's income by minimizing the economic effects of production losses caused by natural hazards. AgriInsurance is a provincially delivered program to which the federal government contributes a portion of total premiums and administrative costs. The federal government also provides a reinsurance arrangement (deficit financing) to provinces. Currently, five provinces (Alberta, Saskatchewan, Manitoba, New Brunswick and Nova Scotia) participate in the reinsurance arrangement. Available Funding Premiums for AgriInsurance coverage are cost-shared between the producer, the province and the federal government.

Corn

- The WTO bound import tariff on corn is 0.5%.

Rice

- The WTO bound import tariff on milled rice is 0.7%.

Soybeans

- Canadian soybean exporters receive market premiums for offering non-GMO, identity-preserved soybeans to E.U. and Japanese markets.
- Expanding use of soybeans for biodiesel production will likely increase Canadian soybean production and soybean imports from the U.S.

Sugar

- The WTO bound import tariff on raw sugar is 5.2 % and on refined sugar is 5.4%.

Wheat

- The Canadian Wheat Board (CWB) acts as a single desk seller of wheat.
- Canada has a TRQ on wheat imports with an in-quota rate of 0.7% (quota amount of 226,883 MT or about 8 million bu) and an out-of-quota rate of 62.8%. Under

the tariff elimination provisions of the North American Free Trade Agreement (NAFTA), most U.S. agricultural products enter Canada duty free.

CHINA

China is the largest producer and consumer of agricultural products in the world. It ranks # 1 in the production of paddy rice, cotton, wheat, pork, vegetables, rapeseed, groundnuts and apples. It is the world's largest consumer of wheat, rice, corn, cotton, pork, oilseeds, and vegetable oils. China is also a major exporter and importer of agricultural products, accounting for more than $60 billion per year.

Historically, China has pursued food security and grain self-sufficiency objectives. The government of China (GOC) has often resisted the implementation of policies that could discourage production of strategic foods. Currently, Chinese food security policy is primarily focused on maintaining self-sufficiency in rice, wheat, corn, and tubers. Soybeans and cotton are no longer part of this group. As part of its Mid-Long Term National Grain Security Plan (2008-2020), the GOC will maintain its grain self-sufficiency rate at above 95% through 2020.

This grain self-sufficiency objective is implemented using direct payments, seed subsidies, tariff rate quotas, and price support programs (for rice and wheat), subsidies for farm machinery, and subsidies for farm use of fuel and fertilizers. In recent years, these programs have expanded and in 2010 increased to $20.3 B from $7.8 B in 2007.

Grain Government Support Programs in 2005-10 (in million US$)

	Direct Payment	Seed Subsidy	Machinery Subsidy	Fuel/Fertilizer Subsidy	Total
2010	2,299	N/A	2,360	N/A	20,323
2009	2,299	3,022	1,979	11,510	18,795
2008	2,299	1,838	609	9,713	15,660
2007	2,299	1,014	304	4,202	7,819
2006	2,162	624	91	1,903	4,780
2005	2,010	594	46	0	2,649

Source of basic data: GAIN Report Number CH11014
Notes: In 2007 and 2008, seed subsidies covered soybeans, rice, wheat, corn, rapeseed and cotton. For 2009 and 2010, seed subsidies were extended to potatoes, hulless barley, and peanuts on a trial basis. Exchange rate used: 6.5684 RMB/US$.

China does not directly provide export subsidies for corn, rice, and wheat, but offers other programs intended to boost exports. These include subsidies of sales from government held reserves, waivers for transportation taxes, subsidies for port fees, and rebates of the value added tax for corn, rice, and wheat exports. Grains seeds are developed and produced mostly by state-owned and funded research facilities. The distribution of seeds is coordinated by local officials with most grains seeds sold at subsidized prices.

Corn and Sorghum

- Tax incentives and export quotas are extended to the corn sector. In 2009, the government removed the VAT rebate to control exports.
- The provincial governments of Heliongjiang, Jilin, and Inner Mongolia (that hold most of China's corn stocks) pay storage fees, estimated at an annual cost of US$ 14.7/MT. The central government periodically offers discounted rail rates to move corn to Dalian airport for shipment to Guangdong.
- Every marketing year, the government purchases corn to replenish stocks to maintain adequate supplies and curb rising domestic prices.
- In November 2010, the government prohibited corn processing plants to participate in grain auctions; only feed/flour millers, or livestock/poultry producers could participate to prevent excessive purchasing and price increases. Further, purchases must not exceed a business' average monthly use.
- The average government floor price for corn in MY 2009/10 is US$ 274/ton.
- The TRQ for corn since 2004 is 7.2 MMT (283 million bu). 60% of the TRQ is required to be traded by state-owned enterprises. The within TRQ tariff rate is 1% and 65% beyond the TRQ.
- Sorghum is not considered an important feed grain and receives no production assistance.

Cotton

- In MY 2010/11, the Agricultural Development Bank of China provided loans (under favorable terms) for the purchase of 2 MMT of seed cotton.
- A TRQ system is in place that maintains the domestic cotton price higher relative to the price in the international market. China distributed the usual 894,000 MT (about 4 million bales) of cotton TRQ for 2011 (1% import tariff) at the end of 2010. Tariff rates beyond the TRQ range from 5% to 40%. An additional 1.7 MMT was distributed subject to a variable rate quota.
- The current seed subsidy rate is approximately $34/ha. This seed subsidy is provided to large seed producers/traders for select "high quality varieties" through an open bidding process. As such, the seed subsidy is intended to improve cotton quality.
- The government operates a state reserve policy where it maintains an unpublished volume of state cotton reserves which it uses (through purchases and releases) to regulate the domestic cotton market. In August and October of 2010, a total of 1 MMT of state cotton reserves was released.
- The government provides a subsidy of $59/MT (RMB 400/MT) of cotton shipped from Xinjiang to mills in coastal and southern cities. 40% of China's cotton is produced in Xinjiang where only one rail line is available to move raw cotton cross-country to textile mills.

Rice

- The government guarantees farmers a minimum price for rice. If prices drop below the floor, the government purchases and stores it, which may be sold at an auction. For MY 2010/11, the government average floor price for early Indica and Japonica are US$ 311/MT and US$ 390/MT, respectively.
- The government holds weekly auctions of both Indica and Japonica rice that correspond to about 2 MMT and 100,000 MT.
- The TRQ for rice (short and long grain) since 2004 is 5.3 MMT (XX million bu). 50% of the TRQ is required to be traded by state-owned enterprises. The within TRQ tariff rate is 1% and 65% beyond the TRQ.

Soybeans

- The government floor price for the purchase of soybeans in the Northeast provinces is set at RMB 3,800/MT (US$ 578/MT).
- The current import duty on soybeans (yellow, black, and green) is 3%. The current import tariff on soybean oil is 9%.
- China currently maintains a biotech-free production policy although importation of genetically modified (GM) soybeans is allowed.

Sugar

- At the beginning of the MY, major sugar-producing provincial governments announce a pre-set sugar cane purchase (floor) price that all sugar cane mills are expected to offer throughout the year. If these sugar cane prices are raised by the provincial governments during the MY, sugar mills will raise the contracted cane rice or pay the farmers a bonus.
- Since 2005, the TRQ is 1.95 MMT, with an in-quota tariff of 15% and an out-of-quota tariff of 50%. 30% of the TRQ is reserved for non-state trading enterprises and the remaining 70% is assigned to state trading enterprises.
- The central and provincial governments manage reserves to ensure adequate supplies and stabilize prices led by the National development and Reform Commission. For MY 2020/11, by March the government auctioned 770,000 tons of sugar.

Wheat

- The government's floor price program provides incentives to boost wheat production in general; there is no additional price incentive for higher quality wheat. As such, higher protein or lower gluten varieties are not grown domestically.

- Wheat exporters are required to apply for export licenses. Since 2008, the VAT export rebate (13%) was removed to discourage exports.
- The government holds weekly auctions of wheat of about 4.5 million MT.
- For MY 2010/11, the government average floor price for wheat is US$ 294/MT while that for white and red wheat correspond to US$ 289/MT and US$298/MT.
- The TRQ for wheat since 2004 is 9.6 MMT (350 million bu). 90% of the TRQ is required to be traded by state-owned enterprises. The within TRQ tariff rate is 1% and 65% beyond the TRQ.

EGYPT

Agricultural policies are crafted and implemented by the Ministry of Agriculture. The Government relinquished land ownership under its agricultural liberalization program and current government policies encourage domestic and foreign investments in new lands. While fertilizer and pesticide subsidy programs were phased out in 2003, assistance to producers in the form of soft loans, free irrigation, and subsidized electricity are maintained. With respect to market access, important U.S. agriculture exports were allowed to enter at 5% or less in 2007. The bound rates for agricultural products were above applied duties for most products. The Egyptian government maintains a policy of price controls on cotton, wheat, and sugarcane.

Corn and Sorghum

- The government procurement price for MY 2010/11white corn crop is $302/ton.
- There is no customs duty for corn, but only about 2% for port charges.
- A 5% import tariff is applied on all sorghum imports.

Cotton

- Direct income support is provided to producers.
- The government has a subsidy program directed to textile mills to purchase affected cotton varieties at prices of LE 100/kentar of seed cotton (a lint equivalent of about $0.53/lb).
- Egypt has removed all export restrictions on its cotton
- Egypt maintains SPS regulations such as banning imports from countries affected by boll weevil infestation. The U.S. is now treated as boll weevil-free by Egypt because risks are considered minimal due to the ginning and baling process.
- The government provides input assistance to producers to defray the costs of land preparation, pesticides, and planting seeds.
- Every year the government specifies certain varieties of cotton for each growing region, and farmers are required to cultivate those varieties according to their respective areas.
- The Ministry of Agriculture continues to be the sole distributor of cottonseed.

Rice

- A 5% tariff is applied on rice imports;
- On February 21, 2009, the ban on rice exports was lifted. Egyptian rice can be exported provided that the exporter delivers through a tender the same amount of

the exported rice to the Government of Egypt and pays the government LE 1,000/MT in export taxes.

- The government purchases and rations rice through the ration card system where ration card holders are entitled 1 kg/person/month of rice (maximum of 4 kg/family). Ration card rice costs LE 1.5/kg.

Soybeans

- Egypt produces soybeans in the newly reclaimed lands, but production is limited by low yields.
- Imports declined following the outbreak of Avian Influenza, which reduces imports of soybeans for the poultry sector.
- The current tariff rate for imported soybeans and refined soybean oil is zero.

Sugar

- The current import tariffs on white sugar and raw sugar are 10% and 2%, respectively.
- As of February 2009, the government imposed an import fee of LE 500/ton on white sugar as a protection for the inefficient domestic industry.
- The current government delivery price for sugar cane for 2010/11 is LE 260/MT ($44/MT).
- The government provides soft loans to sugar cane farmers, which most cane farmers use. The current government policy also promotes expansion of sugar beet production, which is suitable to cultivation in newly reclaimed lands.
- Sugar beet prices are set by mills based on sugar content and premiums are paid for early delivery. The delivery price for sugar beet in MY 2010/11 has been set by the beet sugar companies at LE 320/ton ($54/ton) for sugar beet that has 16% sugar content.

Wheat

- The government procurement price for MY 2011/12 crop ranges from $392/ton to $404/ton based on cleaning ratio.
- The Government Authority for Supply of Commodity (GASC) has a target to purchase 3M MT of local wheat for 2011/12.
- There is no customs duty for wheat, but only about 2% for port charges.

EUROPEAN UNION (EU-27)

Reform of the Common Agricultural Policy (CAP) reduced support prices for selected commodities and introduced direct payments to producers based on crop area. Single Farm Payments (SFP) that do not require production replaced current direct payments at the discretion of member states. Producer payments in the 10 new-member states will be phased in over a 10-year period. These reforms move from a price support policy to an income support policy through decoupled payments and farmers have more choices in their production decisions. These reforms include a renewed commitment to rural development as new-member states are more dependent on agriculture for employment and economic activity.

Under the Renewable Fuels Directive of 2003, member states establish a minimum level of biofuels as a proportion of fuels sold from 2005, starting with 2% and reaching 5.75% of fuels sold in 2010. About 80% of biofuel production in the E.U. is biodiesel, which is produced primarily from rapeseed. Fuel ethanol is mainly produced from cereals and sugarbeets.

Grains (Wheat, Corn and Sorghum)

- The EU imposes import duties and quotas to limit the entry of lower-priced imports of grains.
- Duties are fixed as the difference between the effective EU intervention price multiplied by 1.55 and a representative cost added to insurance and freight (CIF) prices for grains in Rotterdam. The duty for durum and high quality wheat has been set at € 0/MT beginning MY 2010/11 (July 1 to June 30). The duties for corn, and sorghum and rye have been both set at € 0/MT since August 17, 2010 and October 19, 2010, respectively.
- Low and medium quality soft wheat has a TRQ of 2,989,240 MT (from all sources) and a within-quota import duty of Euro 12/MT. However, import duties on low and medium quality soft wheat were suspended from February 28, 2011 until the end of June 2011, after which import duties will be reimposed.
- Since July 2006, the EU opened an annual duty-free tariff quota of 242,074 MT for imports of corn from non-EU countries.
- Farmers and traders unable to obtain a higher market price can, as a last resort, sell their grain to the government at the grains intervention price of € 101.3/MT. Guaranteed intervention quantities have been reduced to 0 MT for corn and durum wheat from MY 2009/10 and 0 MT for sorghum from MY 2010/11. A guaranteed intervention quantity of 3 million for soft wheat is applied from MY 2010/11.
- Interventions of grain are made between November 1 and May 31. Grain held in intervention stores are either sold by tender onto the domestic market or exported; a proportion is given out to the most deprived population in the EU.

Cotton

- The EU does not permit farmers to cultivate biotech cotton.

Per Hectare Subsidies (€/ha)

	2006/7	2007/8	2008/9	2009/10	2010/11	2011/12
Coupled payment	1,039	1,039	1,039	1,400	1,400	1,400
Coupled payment adjusted	1,039	1,039	1,039	1,190	1,123*	N/A
Article 69 payment	259.35	323.81	562.85	480.47	N/A	N/A
Integrated farming aid:						
Under 40 ha	350	350	350	350	350	350
Between 40 and 80 ha	210	210	210	210	210	210
More than 80 ha	105	105	105	105	105	105

*FAS Estimate
Source: GAIN Report GR1101

Rice

- Following the CAP Health Check, the EU agriculture ministers, at the Farm Council in November 2008 agreed to keep until 2011 the 75 euros/ton ($109/ton) direct aid to eligible rice farmers, subject to paddy being produced; this has the effect of delaying the decoupling of the support until January 1, 2012.
- As of 2012, the 75 euros/ton ($109/ton) will be added to the 102 euros/ton ($149.3/ton) currently granted as decoupled payment.
- Rice seed producers continue to be eligible to a "coupled" payment of 172.7 euros/ton ($252.9/ton) for Indica rice seeds and 148.5 euros/ton ($217.4/ton) for Janponica rice seeds.
- The quantity eligible for intervention under the rice intervention system for 2009/10 was set to 0, meaning that should intervention be triggered (if paddy prices fall below 150 euros/ton ($219.6/ton)), buying in paddy prices are to be determined.
- The TRQ in-quota tariff rate is as low as 0 for some product lines and as much as 123.2%.
- The rice subsidized export limit is set at 133,400 MT (3 million cwt).

Soybeans

- A rapidly growing biodiesel industry is increasing demand for all vegetable oils in the EU.
- There is no intervention buying, export subsidy or other market support available for soybeans in the EU.
- As of December 2008, under the CAP Health Check, the set-aside mechanism was abolished.

Sugar

- EU sugar production quota, as defined in the Single Common Market Agreement, is limited to 13.3 million MT.
- Sugar produced in the EU member states that exceeds their individual production quota is considered “out-of-quota” sugar and cannot be sold on the EU sugar market for food purposes. Rather, “out-of-quota” sugar must be sold for export for industrial uses (feedstock for fermentation such as bio-ethanol).
- EU sugar exports are managed through a strict export quota system.

INDIA

India is a leading producer of wheat, rice, coarse grains, and cotton and has been largely self-sufficient in food and fiber production, with occasional imports and exports in years of shortages or surpluses. Under a complex set of interventions, India has achieved impressive growth in food production in the last four decades.

On the domestic front, the government of India has provided input subsidies along with support prices for most agricultural commodities. In recent years, the spread between the government's support price to farmers and the government issue price for wheat and rice have widened and led to higher subsidies. Also, a significant portion of government funds have been allocated to subsidizing production inputs such as fertilizers, seed, power, and irrigation. The fertilizer subsidy alone increased from 60 billion rupees ($1.25 billion) in 1992/93 to 140 billion rupees ($2.88 billion) in 2001/02.

The government also buys agricultural products from farmers at announced support prices. The government has maintained these domestic policies with a series of restrictive trade policies such as import licensing, tariffs, quotas, and state trading. However, the Indian government has been removing many licensing and quota restrictions and is replacing them with high tariffs.

Corn and Sorghum

- 2008/09 minimum support price (MSP) for corn is Rs. 8,400/MT ($4.68/bu).
- The TRQ for corn imports has a quota of 500,000 MT/year (19.7 million bu), subject to an in-quota tariff of 15% and above quota tariff of 50%.
- The government provides an export subsidy in the form of a 5% duty credit scrip on the F.O.B value of exports under the Vishesh Krishi Upaj Yojana (Special Agricultural Product Scheme).
- MSP for sorghum is Rs. 5,400/MT ($3.02/bu).

Cotton

- The Government of India (GOI) establishes a minimum support price (MSP) for cotton at the beginning of every marketing season. The Cotton Corporation of India (CCI), a central government organization, is responsible for price support operations in all states, but is occasionally assisted by state government marketing organizations.
- The current minimum support price for cotton is Rs 2,800 per qtl.
- Government agencies purchase seed cotton at the MSP and sell the processed cotton at market prices; losses incurred in the operation are borne by the government exchequer.

- Besides MSP operations, CCI and state marketing organizations are also involved in purchasing cotton at open market prices for commercial sales.
- The GOI has established an export quota of 4.3 million bales for MY 2010/11. Since February 27, 2011, no further exports of raw cotton have been allowed.
- Export oriented units (EOUs) and firms importing against an advance license receive a duty drawback (zero duty for EOUs, and duty discounts for others) on imports of raw materials for the export of value-added goods.
- Under the "Export Promotion Capital Goods" plan, imports of capital goods and machinery are allowed at reduced duty rates against export obligations (zero duty for a 100 percent EOU).
- Textile exporters are provided 2% of the value of exports to the United States and E.U. in the form of duty free scrips under the Market-Linked Focus Product Scheme. The scrips can be used for importing goods duty-free and is transferable to other importers.

Rice

- The MSP for common paddy (unmilled) rice is Rs. 9,000/MT ($8.18/cwt) for 2008/09.
- Since April 2000, the government of India has applied import duties of 70-80% to keep imports low.
- In April, 2008, the Government of India imposed an export duty of Rs. 8,000 per ton ($160/MT) on basmati rice, on top of the minimum export price (MEP) of $1,200/MT.
- However, on January 20, 2009, the export duty of Rs. 8,000 ($163) per ton applicable to basmati rice was abolished and the MEP was lowered to $1,100 per ton.
- In February 2011, the government allowed exports of 150,000 tons of select premium non-basmati rice varieties; exports other non-basmati rice varieties are not allowed.

Soybeans

- MSP is 1050 Rs/quintal ($6.97/bu) for yellow soybeans and 920 Rs/quintal ($6.04/bu) for black soybeans for MY 2007/08.
- India has a bound tariff rate of 100% for soybeans and an applied tariff rate of 30.6%.
- India has not imported any soybeans in recent years due to high tariffs and phytosanitary restrictions.

Sugar

- The MSP for sugarcane is Rs. 811.8/MT ($18.66/MT) in 2008/09.
- The import duty on raw and refined sugar is 60% ad-valorem on the CIF value, plus a countervailing duty of $19.50/MT (about $0.009/lb) in lieu of the local taxes and fees imposed on domestic sugar.
- Imported sugar is subject to non-tariff barriers and other local regulations applicable to domestic sugar. Mills are allowed to import raw sugar at a zero duty against a future export commitment (mills can refine imported raw sugar and sell it in the domestic market, but must re-export 1 MT of refined sugar for every 1.05 MT of raw sugar imported within a specified period).

Wheat

- The minimum support price for wheat is Rs 11,200/ton for MY 2011/12. The government procurement price is higher at Rs 11,700/ton ($260/ton).
- As of May 2011, the government continues to ban wheat exports due to food price inflation.

INDONESIA

As in other developing countries, concerns about food security during the 1980s and early 1990s resulted in policies aimed at achieving self-sufficiency in food crops, especially rice. Indonesia combined price intervention and economic incentives through subsidized inputs, investment in irrigation, and rice marketing activities in the outer islands to encourage agricultural production, especially of staple crops. Since then, there has been phasing out of input subsidies for pesticides (1989). Fertilizer subsidies, the largest input subsidy, were eliminated in 1998, but reinstated in 2003.

Agricultural trade in Indonesia has been heavily regulated by tariffs, import licensing, export taxes and bans, and informal export quotas. To encourage domestic processing industries, export taxes were levied on primary products to subsidize inputs to the processing sector. Processed agricultural products had import restrictions. Some reforms were undertaken in the mid-1980s which reduced some import tariff rates, lowered ceilings on tariff rates, and raised the number of import items with low tariff rates. In spite of the reforms, domestically produced products corresponding to 54% of domestic production remain on the “Restricted Goods List.” Import monopoly for most of these commodities is through state trading companies. Under the Association of Southeast Asian Nations (ASEAN) Free Trade Agreement, Indonesia has reduced tariffs for all products included in its original commitment (7,206 tariff lines) to 5% or less for products of at least 65% ASEAN origin, but maintains rice and sugar on the sensitive list, exempted from tariff reduction.

Corn

- The Ministry of Agriculture initiated a subsidized seed program for corn in 2006 on up to 3,000 MT of hybrid corn seed.
- To assist the local starch industries, import duties on corn and cassava starch are 10%.

Cotton

- Imports of cotton, textiles, and textile products can only be done by Registered Importers and Producer Importers. The imported cotton must be used as a raw material to produce finished textile products and not be sold directly to market.

Rice

- The government monopoly purchases excess production for price stabilization, emergency conditions, post-disaster food security situations, and to fulfill the ASEAN rice reserve agreement. The Ministry of Agriculture also purchases paddy rice from farmers to prevent the price from falling under the government purchasing price.

- In 2008, the government purchase prices were Rp. 2,200/kg of paddy ($0.204/kg) and Rp. 4,300/kg of milled rice ($0.398/kg). As of January 1, 2009, these prices were increased by 7%.
- The budgetary allocation for fertilizer subsidies was also increased from Rp. 14.6 trillion ($1.5 B) in 2008 to Rp. 20.6 trillion ($2.1 B) in 2009.
- Funding for seed subsidies increased from Rp. 33 trillion ($3.4 B) in 2008 to Rp. 35 trillion ($3.6 B) in 2009.
- Funding for infrastructure development increased from Rp. 89 trillion ($9.2 B) in 2008 to Rp. 99 trillion ($10.2 B) in 2009.
- Sanitary and phytosanitary (SPS) and food quality regulations have led to import restrictions.
- GOI lowered the import duty on rice to Rp. 450/kg (US$ 49.3/ton) in January 2008.

Soybeans

- The government of Indonesia has a 10% import duty on soybeans (effective January 1, 2005).

Sugar

- The government sets a floor price of Rp. 3,800/kg (about $0.18/lb).
- To control imports, the Ministry of Trade grants import licenses for specific quantities of white sugar to four selected importers.

Wheat

- The Indonesian government has anti-dumping import duties on wheat from India and China of 11.44% and 9.50%, respectively. The normal import duty is 0% on wheat and 5% on wheat flour.
- In February 2008, GOI temporarily reduced the import duty on wheat flour to zero and temporarily voided the value added tax (VAT) of wheat and wheat flour. The import duty for wheat flour was 5% and the VAT for wheat and wheat flour was 10%.

JAPAN

The Basic Law on Food, Agriculture and Rural Areas forms the framework and policy direction for agriculture in Japan and is implemented through the revised Basic Plan for Food, Agriculture and Rural Areas, adopted in March 2010. The current plan emphasizes: higher self-sufficiency ratio; consolidation of production, processing, and distribution of agricultural produce to enhance value-added; improve food safety; participate in international standard-setting; and to extend income support regardless of the size of farms.

The agriculture sector continues to receive substantial government support such as a higher MFN applied rate relative to other sectors, tariff quotas, income support, and, in some sub-sectors, income support. In general, the government has veered away from administered prices to direct income support for framers. Production restrictions are also in place, which lead to higher prices.

Corn and Sorghum

- The government of Japan manages a feed price stabilization program whereby a combination of a MAFF subsidy and an industry fund help absorb sudden surges in the compound feed price. Grain prices rose sharply in the last quarter of 2010 and subsidies were once again activated at 3,250 yen/MT.
- Japan holds emergency stocks of corn and sorghum. Since 2005 the stock level has been set at 536,000 MT and 64,000 MT for corn and sorghum, respectively.

Cotton

- Japan has no restriction on cotton imports.

Rice

- In 2010, the Government implemented a new single-year pilot direct-payment program on rice. The program provides participating farmers with income support equal to the difference between the production cost and the "farm gate" price of rice, irrespective of the size of farm scale.
- In FY2011, the Government intends to formally introduce a new direct payment system, extended also to other crops, based on the results of the pilot program.
- The tariff quota quantity for rice (milled rice basis) in 2008 was 682,200 MT.
- In 2009, a total of 100,000 tons of rice were imported and marketed directly under the simultaneous buy-and-sell (SBS) system.
- Japan holds emergency stocks of rice. Since 2005, the stock level for rice has been set at approximately 350,000 MT.

Soybeans

- Soybeans are one of the "targeted farm products" under MAFF. Soybean producers receive a subsidy based on the difference between the cost of domestic production and the farm gate sales price. The subsidy equals roughly 30,200 yen/10 acres ($1,009/ac) or 8,840 yen/60kg ($37/bu).
- The U.S. share of Japan's soybean imports is about 76%.
- There is no tariff on soybean imports.

Sugar

- Historically, Japan's price support system guaranteed a price for domestic beet and cane producers, set each year. The government set a price at which it would buy raw sugar from refiners that allowed refiners to pay the guaranteed price for beets and cane, then purchased sugar at the set price, resold the sugar to refiners at a lower price, roughly equivalent to the import price.
- In 2007, the sugar beet support program shifted from a price support to a direct payment system.
- Currently, the average MFN tariff rate for sugar and sugar confectionery is 39.1%.

Wheat

- MAFF controls both producer and resale prices of domestic and imported wheat. MAFF buys imported wheat at international prices and sells it to domestic flour millers at a markup. During the first quarter of 2010, the MAFF sold imported wheat at twice the purchase price. On the other hand, MAFF buys domestic wheat at a high price and sells it to domestic flour millers at a significantly lower price, lower than imported wheat, so that the lower quality domestic wheat will be accepted. Revenues from transactions for imported wheat are used to help cover the cost difference between the purchase and resale of domestic wheat. This is referred to as the "Cost Pool System".
- The tariff quota quantity for wheat in 2008 was 5.74 MMT (211 million bu). The in-quota tariff rate is
- MAFF allows flour millers to import wheat outside of MAFF's control as long as they export an equivalent amount of wheat flour. This so-called "free wheat" is imported at world prices and is thus very profitable. This system also provides millers with an export market for their lower quality flour, which otherwise would have little value in the domestic market.
- Under the simultaneous buy-and-sell (SBS) system, a certain amount of imported wheat and barley may be purchased and marketed directly. A total of 125,180 MT of imported wheat were contracted under the SBS in FY2010.

MEXICO

Since the transition period of the North American Free Trade Agreement (NAFTA), some market interventions have been drastically reduced. However, some reversal of this trend has occurred in recent years with the introduction of a Target Income Program for some crops and an increase in energy and irrigation subsidies.

The Target Income Program provides direct support to producers of corn, wheat, sorghum, barley, cotton, and a few other crops in certain regions of the country that have a marketable surplus. Under this program, payments are provided to producers for the difference between the market price of the eligible commodities and the "Target Income". The market price is defined by the Support and Services for Agriculture and Livestock Marketing Agency (ASERCA) within the Secretariat of Agriculture, Livestock, Rural Development, Fisheries and Foodstuffs (SAGARPA) based on prices offered by buyers during the harvest season and international/regional prices, among other factors. The electricity program lowers the price of electricity used for agricultural activities. The electricity price is set at $0.03 per kwh, which is one fifth of the price paid by urban consumers. Additionally, the diesel program reduces the price of diesel used for agricultural activities by providing tax concessions. The effective price paid by farmers is 44% less than the market price.

Corn and Sorghum

- For FY 2011, the government of Mexico, under the PROMASA program, will provide support for production of up to 300,000 MT of corn flour (nixtamal) dough. The supports per kilogram of corn flour dough for tortillas correspond to 0.60 pesos/kg and 0.50 pesos/kg for small and medium enterprises, and low-income consumers. The assumption behind these supports is that every kilogram of corn produces 1.8 kilograms of corn flour dough, requires 0.0035 liters of gas and 0.040 kilowatt hours of electricity.
- Under the PROCAMPO (the Mexican domestic agricultural support program), the new income subsidies for corn and sorghum for the 2009-12 crop cycles correspond to 963 pesos/ha and 1,300 pesos per hectare (USD $71.07- 95.94/ ha) for production areas between 1 and 5 hectares, and over 5 hectares. Also, the maximum payment limit under the program was reduced to 100,000 pesos (roughly USD $7,380.00) regardless of total production area.
- The target price for corn is 2,100 pesos/MT (about $3.96/bu) from 2008/9 to 2013.
- Since the implementation of NAFTA, the out-of-quota bound tariff on corn has been reduced form 206% to 37%. The TRQ quota has increased from 2.5 MMT (approximately 98 million bu) to 3.515 MMT (138 million bu). Out-of-quota tariff was reduced to 0 after 2007.
- Target income for sorghum producers is 1,785 pesos/MT (about $3.36/bu) from 2008/9 to 2013.

Cotton

- Under the PROCAMPO (the Mexican domestic agricultural support program), the new supports for cotton (similar to corn and sorghum) for the 2009-12 crop cycles correspond to 963 pesos/ha and 1,300 pesos per hectare (USD $71.07- 95.94/ ha) for production areas between 1 and 5 hectares, and over 5 hectares. Also, the maximum payment limit under the program was reduced to 100,000 pesos (roughly USD $7,380.00) regardless of total production area.
- The target price for cotton was increased from 12,600 to 19,800 pesos per ha ($1,057- 1,661/ ha) beginning January 1, 2011. This is the minimum reference price that producers will receive if international cotton prices decline or crops are damaged.

Rice

- The target income support price for rice is 2,940 pesos/MT ($5.94/bu) from 2008/9 to 2013.
- Under the PROCAMPO (the Mexican domestic agricultural support program), the new supports for soybeans (similar to soybeans, cotton, corn and sorghum) for the 2009-12 crop cycles correspond to 963 pesos/ha and 1,300 pesos per hectare (USD $71.07- 95.94/ ha) for production areas between 1 and 5 hectares, and over 5 hectares. Also, the maximum payment limit under the program was reduced to 100,000 pesos (roughly USD $7,380.00) regardless of total production area.
- Soybean farmers also receive income support payments through the PROCAMPO program.

Soybeans

- The target income support price for soybeans is 4,200 pesos/MT ($8.49/bu) from 2008/9 to 2013.
- Under the PROCAMPO (the Mexican domestic agricultural support program), the new supports for soybeans (similar to cotton, corn and sorghum) for the 2009-12 crop cycles correspond to 963 pesos/ha and 1,300 pesos per hectare (USD $71.07- 95.94/ ha) for production areas between 1 and 5 hectares, and over 5 hectares. Also, the maximum payment limit under the program was reduced to 100,000 pesos (roughly USD $7,380.00) regardless of total production area.
- Soybean farmers also receive income support payments through the PROCAMPO program.

Sugar

- The reference price for sugarcane payment calculations for the MY 2010/11 crop is 10,222.26 pesos per MT (U.S. $819.74/MT at the exchange rate of 12.47 pesos per dollar); this is 55% higher than last year's reference price of 6,579.21 pesos per MT (U.S. $495.42/MT). This reference price will be used for payment adjustments to MY 2009/10 sugarcane, as well. According to Article 58 of the Law of Sustainable Development for Sugarcane, approximately 57% of the reference price for standard sugar is paid to growers for their sugarcane.
- Mexico and the U.S. have a comparable set of prohibitive over-quota tariffs on sugar imports. The over-quota tariff on raw sugar is $0.338/kg ($0.15/lb) and $0.36/kg ($0.16/lb) for refined sugar.
- Numerous financing-related subsidies such as debt restructuring, borrowing concessions, and government-backed financing for mills are also given to the sugar sector.

Wheat

- The target income support price for wheat is 2,730 pesos/MT ($5.51/bu) from 2008/9 to 2013.
- Under the PROCAMPO (the Mexican domestic agricultural support program), the new supports for wheat (similar to rice, soybeans, cotton, corn and sorghum) for the 2009-12 crop cycles correspond to 963 pesos/ha and 1,300 pesos per hectare (USD $71.07- 95.94/ ha) for production areas between 1 and 5 hectares, and over 5 hectares. Also, the maximum payment limit under the program was reduced to 100,000 pesos (roughly USD $7,380.00) regardless of total production area.

NIGERIA

Nigeria has undertaken an economic structural adjustment program to reform its economy. The reforms were less extensive compared to the other West African countries because of the larger size of its economy and its position as a major oil exporter. Although fertilizer markets have been deregulated, Nigerian agriculture is heavily influenced by government intervention. The government supports focus on input supply, extension service deliveries, the administration of soft loan programs, and the maintenance of a buffer stock program to stabilize commodity prices. The Nigerian agricultural sector remains heavily protected with an average applied tariff of 40%.

Corn and Sorghum

- As a member of the Economic Community of West African States (ECOWAS), Nigeria is committed to tariff schemes consistent with the harmonized system under the organization's common external tariff (CET) policy.
- The import ban on corn and sorghum was lifted in 2008 and the current import duty on corn and sorghum is 5%.
- Corn exports are still banned though large informal cross-border exports to Niger, Chad and Sudan occasionally occur.

Cotton

- Nigerian cotton is discounted because of trash and propylene contamination which has reduced its competitiveness relative to other African countries. The government has instituted an export enhancement grant of 20% to compensate for the discounts to Nigerian cotton.
- While imports from other countries, mainly the U.S., are subject to a 50% tax, those from neighboring countries enter Nigeria duty-free.

Rice

- The benchmark price for all types of imported rice (from all origins) during the first quarter of 2011 was $560/ton. Duties are calculated based on the benchmark price regardless of the actual FOB price.
- Semi- or wholly-milled rice imports face a 10% duty and a 20% levy. Imports of brown rice face a 5% duty and no levy.
- In 2011, the government restricted the importation of rice through seaports and banned importation through land borders to minimize rice smuggling.

Soybeans

- A rapidly growing Nigerian poultry sector (due to a governmental ban on poultry imports) increased the demand for soybeans. Domestic production at 200,000 MT (about 7 million bu) is not able to meet the need for the poultry sector, human consumption, and manufacturing. Nigerian soybean imports are expected to reach 100, 000 MT (3.7 million bu).
- The import duty on soybeans is 15%.

Sugar

- The effective duty on refined sugar is 35% broken down as follows: import duty (20%), VAT (5%) and development levy (10%).
- Raw sugar imports have a duty of 5% and are exempt from the sugar development levy.
- It is mandatory for all sugar for direct consumption to be fortified with Vitamin A. Fortification costs about US$ 5/ton.
- To further investments in local sugar production, the following incentives are provided by the government through the National Sugar Development Council (NDSC):
  - 5% duty on capital equipment for sugar production; agricultural chemicals for sugar production face 0% duty
  - 100% foreign ownership of sugar complexes is allowed
  - Access roads, boreholes, power lines, land acquisition, and health care facilities for new sugar estates are provided
- The NDSC and the Central Bank of Nigeria currently assist farmers in acquiring fertilizers, pesticides and seed cane, and provide credits to out-grower cooperatives (contracted out by sugar estates) at a low interest of 7%.

Wheat

- The import duty on wheat is 5% in addition to port surcharges equal to 7% of the duty value and the Combined Import Supervision Scheme fee equal to 1% of FOB value.
- The current import tariffs on wheat flour and biscuits are 35% and 25%, respectively. A 5% VAT is also applied on wheat flour.
- Similar to sugar, millers are required to fortify flour with vitamin A.

PAKISTAN

The government of Pakistan uses a minimum price support program for major crops produced in the country. Under this program, the government agrees to make purchases when the market price falls below an announced level. In addition, the government subsidizes agricultural production credit through both government and private banks for the purchase of seeds, fertilizers, pesticides/insecticides, animal feed, labor, fuel, irrigation water charges, and agricultural machinery. Input subsidies are offered for electricity and fertilizer and development loans are also provided for machinery purchases. The government also subsidizes natural gas purchases for fertilizer production at around $200 million/year.

Cotton

- The GOP, through the Pakistan Central Cotton Committee (PCCC), is in the process of increasing the cotton cess by 150 percent from Rs.20 to Rs.50 per bale (standard bale of 170 kg) ($0.23 to $0.58).
- No quantitative restrictions or import/export duties are in place for cotton.

Rice

- MSP for 2005/06 is Rs 300/40kg ($5.72/cwt) for paddy rice.
- Since 2000, the GOP discontinued setting a procurement price for paddy and milled rice and abandoned rice procurement through state trading enterprises. However, in 2008, the GOP intervened in the rice market through two state bodies: Pakistan Agricultural Services and Storage Corporation (PASSCO), and the TCP. PASSCO was authorized to procure 500,000 tons of Basmati and 500,000 tons of IRRI rice to stabilize prices. PASSCO set floor prices at Rs 1500/40 kg ($468/MT) for Super Basmati, Rs 1250/40 kg ($390/MT) for 385 varieties.
- There is a 10% import duty and 15% sales tax on rice imports.

Sugar

- The GOP supports cane production by setting an indicative price, which is announced either before or after planting. The Federal government generally does not procure cane although it authorizes Provincial governments to fix respective cane prices after consultation with sugar industry and farmer organizations representatives.
- The MSP for sugarcane varies by region. In 2008/09 it ranged from Rs 80/40kg to Rs 81/40kg.

- The GOP maintains a 15% regulatory duty on raw sugar imports, a 16% general sales tax, and a 1% excise duty.

Soybeans

- The government of Pakistan offers no price support mechanism for soybeans and does not engage in state procurement programs.
- The bound tariff rate for soybean imports is 100%. The applied rate is 10%.

Wheat

- The government procurement price for wheat was set during MY 2009/10 at Rs.950 per 40 kg
- ($276/MT); this price was maintained in the 2010 crop and will be used for the 2011 procurement season (April-June).
- The Government of Pakistan lifted its ban on the export of wheat in December 2010 and allowed private sector to export wheat. The government has also announced that there will be no ban on the export of wheat during the 2011 procurement season.
- The Government has fixed a procurement target of 6.57 MMT for MY 2011/2012. The cost of purchasing the target volume at the procurement price is nearly $1.8 billion.
- The government controls the market for wheat in Pakistan through a minimum guaranteed support price and an issue price for wheat sold to flour mills. Grain stocks are procured and maintained by the provinces through the Pakistan Agriculture Storage and Services Corporation (PASSCO). This government wheat procurement storage and distribution system is financed through borrowed money from commercial banks.

RUSSIA

Russia's support of grain production is from grain interventions, in which grain is purchased into a fund if market prices for farm products drop lower than the pre-determined level. Grain is sold out of the fund if there is a shortage on the market or if market prices exceed the pre-determined level. Budgetary constraints limit the ability for direct subsidies or other forms of support.

Agricultural energy is subsidized. This includes such items as fuel for machinery and natural gas. The Russian government remains committed to increasing production by increasing credit and subsidizing crop inputs, as well as offering a special machinery leasing fund. However, implementation of these programs depends on the federal budget allocation to agriculture. While no prescribed rules govern seed subsidies, many local jurisdictions offer credit for seed purchases, sell seeds below their commercial price, or cover a portion of seed treatment expenses.

Russian imports of grain have been hampered by changes in grain quality certification. Trade has been disrupted by the strengthening of phytosanitary control over grain and grain products.

Corn

- The federal government subsidizes seed breeding (Elite Seeds Program), but the reproduction of these seeds and their commercialization is not supported by the government.
- The Government established preferential tariffs for rail transportation of grain to drought-affected regions in 2010 from the South (coefficient is 0.5) and from Siberia (coefficient is 0.3). These preferential tariffs are effective until July 1, 2011.
- Russia banned all grain exports until July 1, 2011.

Rice

- Rice is the only grain product imported in significant quantities.
- In December, 2006, Russia placed a ban on all rice imports from all countries. The resumption of imports will be linked to the equipping of inspection points with modern equipment that can better test quality and safety of rice. The move demonstrates the power of the Russian Federal Veterinary and Phytosanitary Surveillance Service (VPSS) to control the trade of grain products.
- The rice import tariff is 0.07 euros/kg ($4.11/cwt).

Soybeans

- Import duties were suspended for soybeans in the same resolution that lifted duties for corn. The official import duty is 5%.
- Actual imports of soybeans are currently restricted by SPS requirements and unsettled GMO registration procedures. It is expected that soybean imports would increase significantly when these SPS issues are resolved.

Sugar

- Russia is the world's largest sugar importer.
- Because the Russian government cannot offer significant support to the industry, it assists the industry primarily through border measures.
- The GOR actively regulates sugar supplies by means of (1) import duties for raw cane sugar and (2) quotas for white beet sugar originating from Belarus.
- As an additional measure of sugar market regulation, the GOR sells sugar from the state reserves at auctions; the GOR plans to auction 300,000 MT of sugar in 2011.
- In January 2011, the Russia-Belarus-Kazakhstan Customs Union Commission decided to temporarily lower the import duty for raw sugar from $140/MT to $50/MT in the period March 1 to April 30, 2011.
- Beet sugar originating from Ukraine will be not subject to import duties beginning January 2013.

Wheat

- State procurement intervention prices range from 2,300 rubles/MT ($3.38/bu) for No.3 wheat to 1,800 rubles/MT ($2.51/bu) for No.4 wheat.
- In November and December of 2008, when the Ministry of Agriculture increased Class 3 wheat price from 5,000 rubles to 5,500 rubles (approximately $200) per MT for all provinces of the Russian Federation, and then raised it to 6,000 rubles ($218) per metric ton for the Ural and Siberian Federal Districts and for Orenburg oblast.
- Russia has been expanding grain shipping and port capacity in an effort to boost exports**.**
- Import tariffs for all grain except rice are 5% of customs value.

SOUTH AFRICA

South Africa has undergone major policy changes since the end of Apartheid. While the major policy changes with respect to agriculture were dominated by an expensive land reforms policy, the government has also implemented major changes in the agricultural economy. The country opted for import tariff as a means to control imports and enters into preferential trade agreements with neighboring countries under the Southern Africa Custom Union and outside the region. Under its WTO commitments, all tariffs schedules are below bound rates and the average unweighted tariff was reduced to 9.1%.

Corn and Sorghum

- South Africa does not provide a minimum guaranteed price for corn.
- There has been no import duty on corn since Dec. 8, 2006.
- South Africa has banned corn imports under its SPS regulation for imports of genetically modified corn.
- The tariff applied for sorghum is 3%.

Rice

- South Africa does not produce rice and does not apply any duty with respect to rice imports.

Soybeans

- Soybean production is increasing in South Africa due to less production risk compared to corn, an increasing demand of soybean meal for animal feed, an increasing demand for soybean oil as table oil, and the emergence of biodiesel production.
- The current import tariffs for soybeans and soybean meal are 8% and 6.6%, respectively.
- The full rebate on the import tariff on soybeans for the production of bio-diesel has been approved from July 1, 2008 to June 30, 2011.

Sugar

- Prices are determined by a pooling mechanism under the control of the South Africa Sugar Association. The association operates as a State trading Enterprise and has sole control over exports.
- The country applies a flexible (variable) import tariff system based on a formula that yields different rates depending on domestic market conditions. For instance, if a high world price induces a rise in exports of South Africa sugar, the formula

kicks in and the tariff rate falls to encourage imports to satisfy the needs of the domestic market.

- The sugar tariff was 55c/kg ($0.25/lb) then fell to 23.3c/kg ($0.11/lb) then to 0 because of higher world price, but tariff protection for South Africa's sugar producers against disruptively low world sugar prices remain in place for the 2008/09 season.

Wheat

- The dollar duty on wheat is calculated as the difference between the 3-week moving average of the US No. 2 HRW Gulf settlement price (world reference price) and the domestic Dollar-based reference price. If the 3-week moving average of the world reference price shows a variance of more than $10/ton from the existing level for 3 consecutive weeks, an adjustment to the tariff is triggered and a new duty will be calculated. The resulting dollar specific duty is converted to Rand according to the Rand/Dollar exchange rate prevailing on the day that the adjustment is triggered.
- The domestic Dollar-based reference price for wheat currently is US$ 215/ton as of April 2010

SOUTH KOREA

South Korea has supported its agricultural sector at a relatively high level compared to the policies of other member countries of the Organization for Economic Cooperation and Development (OECD). Public intervention mainly consists of high prices supported by government purchases together with high tariffs that protect domestic producers from foreign competition, that implicitly tax consumers.

Corn

- The TRQs for processing corn and feed corn correspond to 2,234,000 MT and 9M MT for 2011, both with a 0% in-quota duty and a 328% out-of-quota duty.
- The entire TRQ for feed corn is allocated to feed miller members of the Korean Feed Association (KFA) and Nonhuyp Feed Inc. (NOFI) while 2.2M MT of processing corn is managed by the Korea Corn Processing Industry Association (KOCPIA).
- The government's state trading arm Korea Agro-Fisheries Trade Corporation (aT) formed a consortium with four private companies (Samsung C&T Corporation, STX Corp., CJ Corp., and Hanjin Shipping) to directly secure no less than 20% or 2.5M MT of Korea's total annual imports of grains and oilseeds (including 1.5M MT of corn by 2015) as part of the food security strategy of the Ministry of Strategy and Finance.

Cotton

- Cotton seeds for feed: TRQ quantity sets at 160,000 MT for 2011 with an in-quota duty of 2 percent.

Rice

- The government subsidizes domestic rice production through two forms of direct payments: an area payment which is based on farm size, and a price support payment under the Rice Income Compensation Act (RICA).
- As part of the Public Storage System for Emergencies (PSSE), the government purchases domestic paddy rice during the harvest season while paying the average market price and selling it during the non-harvest periods at the prevailing domestic market price.
- Korea imports rice as part of its WTO Minimum Market Access (MMA) rice agreement. Korea's commitment under 2011 MMA is 347,658 tons of milled rice.

South Korea's Direct Payment Program for Rice Income Compensation

	Area Payment (A)			Deficiency Payment (B)			
Year	Area (1,000 HA)[1/]	Payment (Won/HA)	Total (Billion Won)	Production (1,000 MT) [2/]	Payment (Won/Kg)	Total (Billion Won)	Total (Billion Won) (A)+(B)
2005	1,007	600,000	604.2	4,586	196.4	900.6	1,504.8
2006	1,024	700,000	716.8	4,637	94.2	437.1	1,153.9
2007	1,018	700,000	712.6	4,553	61.3	279.3	991.9
2008	1,014	700,000	709.8	4,499	none	0	709.8
2009	894	703,696	632.8	3,977	150.4	597.1	1,229.9
2010 [3/]	890	700,000	623.0	na	na	na	na

Source: GAIN Report KS1030

[1/] Those eligible for payment include farmers, farming union corporations, agricultural corporations, or anyone producing rice on a minimum of 0.1 HA of farmland between Jan 1, 1998 and Dec 31, 2000.

[2/] based on the Olympic average rice yield is 4,880 kg per hectare for 1999-2003 and actual cultivated area registered under the program.

[3/] FAS/Seoul estimates

Note: The scale of area payment has reduced due to tightened qualification effective June 26, 2009.

- The state-run aT administers purchases and sales of imported rice through a public auction system.
- A total of 390,000 tons of government held domestic and imported rice (2006-2008 crops) will be released to the rice food industry at 355 Korean won/kg ($0.31/kg) until the end of 2011.
- The government plans to provide 3 million Korean won ($2,700) per hectare for farmers who cultivate other crops in their rice paddy lands. The plan is to have rice farmers cultivate other crops in 40,000 ha paddy land from 2011-2013.

Soybeans

- Soybean for oil crushing and oil cake for feed from 3 to 0 with 1,150,000 TRQ for 2011.
- The government purchases soybeans at a fixed price set each year. For CY2010, the price was fixed at 3,168 w/kg ($2.75) while the average wholesale soybean price during year was 4,900 w/kg ($4.24); no government purchases were made in 2010. The annual purchase target of 14,100 MT has remained unmet in recent years due to high domestic prices. (Applicable 2010 Averaged Korean Foreign Exchange Rate at 1,156 per US$)

Sugar

- Refined sugar for food processing: In-quota duty decreased from 35 percent to zero percent with an unlimited quantity until June 30, 2011.

Wheat

- The TRQ for mill wheat is 2.4 M MT at 0% and the out-of-quota duty is at 1.8% from January 1 to June 30, 2011. Flour import tariff rate as of May 2011 is 2.5%.
- The government has in place a loan program to finance purchases; drying and storing facilities are also provided to local wheat producers.

THAILAND

In MY 2009/10, the government implemented a new framework of agricultural support. A direct payments program based on established government price insurance called the Price Insurance Scheme (PIS) replaced the indirect support for rice, corn and tapioca under the Price Mortgage Scheme (PMS). Under the PIS farmers are able to cash-in on their sales at market prices immediately. The PIS is expected to be continued over the long term as the government avoids stocks intervention and accumulation under this scheme. In MY 2009/10 PIS, the government paid around 48 billion baht ($1.5 billion) for compensation to farmers, as compared to the buy-in cost of the MY 2008/09 Paddy Mortgage Scheme of 130 billion baht ($3.8 billion), which excludes post-harvest handling costs.

Corn

- For MY 2011/12 the Price Insurance Scheme for corn will likely continue to be implemented. The government did not pay any compensation in MY 2010/11 program as market prices of corn have been above insurance prices.
- Thailand's WTO agreement allows for a TRQ of 54,700 tons at a 20% in-quota tariff rate for corn. Shipments are allowed only during the period of March 1 – June 30, 2011 when domestic production is minimal. Meanwhile, out-of-quota imports are subject to a 73% tariff rate with a surcharge of 180 baht/ton ($6/MT). Under AFTA, countries in the region will be able to export tariff and quota free into Thailand from March 1 – June 30.

Rice

- The Price Insurance Scheme which replaced the long-standing Paddy Mortgage Scheme remains in place for the MY 2010/2011 crop. The revised insurance prices and the amount of eligible tonnage per farm/household are as follows:

Insurance Prices of MY2010/11 Second Crop

Paddy	**MY 2009/10 and MY2010/11 main**		**MY 2010/11 second crop**	
	Insurance Price (Baht/Ton)	Eligible Tonnage (Ton)	Insurance Price (Baht/Ton)	Eligible Tonnage (Ton)
White rice	10,000	25	11,000	30
Pathumthani Fragrant Rice	11,000	25	11,500	30
Glutinous Rice	9,500	16	10,000	30

- Also, the government has additional measure on the Direct Purchase Program with a target of 2.0 million tons of paddy to buy at benchmark prices, effective March 16, 2011. This will help stabilize domestic prices of paddy which are under downward pressure during the harvest.

Soybeans

- Under the Agreement on Agriculture, Thailand has a tariff rate quota (TRQ) of 10,922 tons and 20% tariff rate. On November 25, 2010, the Thai Cabinet approved unlimited quota for soybeans imported from WTO member countries from 2011-2013 subject to zero tariff; out-of-quota imports are subject to 80% tariff rates.
- Imports of soybean meal are also subject to TRQ system with a quota of 239,559 tons and a 20% tariff rate. On November 16, 2010, the Thai Cabinet approved unlimited in-quota imports under WTO for soybean meal with a 2% tariff rate and 119% for the out-of-quota imports.
- Under the ASEAN-Korea FTA (AKFTA), the import quota for soybean meal for 2011 is unlimited and in-quota imports are subject to 5.56%.
- Imports of soybean oil (crude and refined) are subject to a tariff-rate-quota (TRQ) system under the WTO agreement. In 2010, the TRQ for soybean oil was set at 2,281 tons, subject to an in-quota tariff rate of 20% and out-of-quota tariff rate of 146%.

Sugar

- In 2010, the government approved a 3-year soft loan of 3,000 million baht ($100 million) with an interest rate of 4.7 percent/year (Minimum Retail Rate minus two percentage points: MRR-2) for cane growers to buy harvesters to improve their harvest efficiency.
- The government controlled sugar prices are currently set at 19 baht/kg ($26 cent/lb) for white sugar, and 20 baht/kg ($27 cent/lb) for refined sugar, ex-factory wholesale (excluding 7% VAT).
- The retail prices (include VAT) are set at 21.85 baht/kg ($33.0 cent/lb) for white sugar, and 22.85 baht/kg ($34.5 cent/lb) for refined sugar. However, market prices are 10-30 percent higher than control prices due to record international sugar prices driven by lower-than-expected global sugarcane production.

Wheat

- The tariff rate on imported wheat has been zero since September 2007. Meanwhile, the tariff on wheat flour is 5 percent (0.5 baht/kg), except within AFTA which is duty free since January 2010.

TURKEY*

The agricultural policy in Turkey has been characterized by *ad hoc* changes in policy under an environment of high inflation. Agricultural policy has moved from market price support and input payments to income support payments. However, the direct support program which started in March 2000 and was funded by the World Bank was discontinued after MY 2007. The budget of direct support payments was then diverted to deficiency payments, chemical fertilizer payments and diesel support payments. While the government has not released official support budget for the grain sector, available information shows no direct support payments in MY 2009 but that the budget for chemical fertilizer and diesel support will increase. In 2008, 7 YTL/ha ($5.4/ha) was paid in the form of direct support payment, 3.25 YTL/ha ($2.5/ha) in diesel support, 5 YTL/ha ($3.8/ha) in seed support, 4.25 YTL/ha ($3.3/ha) in chemical fertilizer support, and 1.7 YTL/ha ($1.3/ha) in irrigation energy support.[4]

As a result of IMF negotiations, in January 2009 the government decreased the amount of agricultural support from 5.5 billion TRL ($3 B) to 4.96 billion TRL ($2.7 B).

Corn and Sorghum

- The corn premium also is unchanged at 40 TL/MT in MY 2010 and MY 2011.
- Since September 26, 2010, corn and corn derivatives cannot be imported, except in limited quantities from some EU countries by paying a premium to get certified non-biotech corn following the Biosafety Law.
- Turkey imports corn duty free under an inward processing regime, or with a customs duty of 130% for corn outside of the inward processing regime. Because of the Biosafety Law, corn, starch or corn by-products exporters are not currently using the inward processing regime.

Cotton

- The support mechanisms for the cotton sector are in three categories: (1) Premium support, (2) Direct support, and (3) Diesel and Chemical fertilizer support. The premium support is a payment based on production, given directly to the farmer per kilogram of unginned cotton production, which is approximately $0.17/kg for the producer using certified seeds and about $0.14 /kg for producers using non-certified seed ($0.24/lb and $0.18/lb lint equivalent) as of April 2009.
- In April 2008, the government announced that payments ("production bonuses") for 2007/08 seed cotton would be YTL 0.348 (approximately $ 0.28) per kilogram, which will continue until 2011.

[4] No recent data on the level of agricultural support after MY 2009.

- The diesel and chemical fertilizer support payments are made on per hectare basis. For cotton, these payments are $35.43/ha for diesel fuel support ($14.34/ac) and $23.57/ha for chemical fertilizer support ($9.54/ac) as of April 2009.
- The cotton premium was increased from 324 TL to 420 TL/MT in MY 2009 and remained the same in MY 2010 and MY 2011.
- For a period of 9 months from July 2011, imports of fabric and garment will be subject to 20% and 30% import duty, respectively.
- The Turkish government spent more than US$ 22 billion over the past three decades on an irrigation and agricultural extension project in Southeast Anatolia, called the GAP project. When finished around 1.7 million hectares of land will be irrigated and a total of 22 dams will be completed. So far about 74% of the hydro-electric projects and 15% of the irrigation projects are completed.
- In 2008 the government promised to allocate US$ 12 billion in five years for dams, irrigation and infrastructure in the region. In 2009 and 2010 the government allocated funds for the project for irrigation projects. If actually realized, a total of 1.04 million hectares of land will be irrigated by 2013, which could eventually increase cotton production in the region.

Rice

- Since 2003, Turkey has applied a TRQ on rice imports. There is a dispute between Turkey and the U.S., in which the U.S. claims that Turkey has required licenses in order to import rice both at the in-quota and over-quota rates, which is a non-transparent and discretionary process.
- The import duty remained at 34% for paddy rice in MY 2011 and 45% for milled rice.

Soybeans

- The production bonus for the use of certified soy seed increased from 350 TL (USD233) per ton in 2010 to 500 TL (USD310) per ton for the 2011 crop.
- In 2011, soybeans are subject to 8 percent tariff.
- On January 26, 2011, the Turkish government approved imports of three soybean events (MON89788, MON40-3-2 and A2704-12) for use in feed sector only.

Sugar

- Turkey's sugar production is limited by quotas: 2,288,000 MT (centrifugal sugar) and 244,000 MT (starch-based sweetener) for MY 2011/12.
- The Sugar Law of 2001 formed a Sugar Board under the Ministry of Industry and Trade whose main responsibility is to distribute production quotas to all the sugar- and sweetener-producing companies based on their performance over the previous

three years. For newly established refineries, the quota is determined by their reported capacity.

Wheat

- The current government support for usage of certified wheat seed is 60 TL/ha.
- The import tariff on wheat was temporarily reduced to 0% (from 130%) until May 1, 2011.
- On December 22, 2010 The Turkish Ministerial Council allocated a 1 MMT duty free import quota for wheat to the Turkish Grain Board (TMO) which can be used until December 31, 2011.
- Over the years, government support for wheat producers are as follows:

Turkey: Government support to wheat producers

Year	Certified seed (TL/ha)	Soil analysis (TL/ha)	Premium (TL/MT)	Diesel (TL/ha)	Fertilizer (TL/ha)
2005	50	-	-	24	16
2006	50	10	30	-	-
2007	50	10	35	28.8	21.3
2008	45	10	40	28.8	21.3
2009	50	22.5	45	29.3	38.3
2010	50	25	50	32.5	42.5
2011	60	25	50	37.5	47.5

Source: GAIN Grain and Feed Annual, 18 April 2011.

- The Turkish inward process regime allows exporters to obtain raw materials, intermediate unfinished goods that are used in the production of the exported goods without paying customs duty and being subject to commercial policy measures. Under this regime, exporters get special import licenses when they export wheat products (i.e. wheat flour and pasta). For example, when pasta exporters export 100 MT of pasta they are eligible to import 175.4 MT of wheat at a zero tariff rate (conversion rate is 1.754) and when a wheat flour producer exports 100 MT of wheat flour they are eligible to import 140 MT of wheat duty free.
- TMO also allocated its quotas of 230,000 MT milling wheat and 100,000 MT of EU durum wheat to the private sector.
- Turkish wheat exports usually depend on TMO export policy.

UZBEKISTAN

Agriculture receives high policy priority in Uzbekistan. The main objectives of Uzbekistan's agricultural policy in recent years are to (1) maximize and stabilize export revenues from agricultural outputs, (2) redistribute revenue from agriculture to other sectors, and (3) improve rural standards of living.

On October 21, 2008, the government adopted a decree called "On Measures of Optimizing Sown Area and Increasing Production of Food Crops." The goal is to increase production and variety of food crops in order to meet domestic demand. According to this decree, in MY 2009/10 cotton planted area will be decreased by 75,000 hectares to 1.315 million hectares, and accordingly, the official seed cotton production target will be lowered to 3.4 MMT. The freed land will be reallocated to grains and vegetables.

Cotton

- The government maintains control over all aspects of production, including planted area, production targets, prices, inputs, procurement, and marketing.
- The state fixes the area that farmers have to cultivate to produce cotton.
- Exportation of cotton is centrally controlled by the state. All cotton lint is sold either to trading companies of the Ministry of Foreign Economic Relations to Investments and Trade (MFERIT) for export or to the Republican Commodity Exchange that offer them for sale to domestic consumers.
- Before 2004, cotton farms were state owned. In 2003 the government decreed that all state farms reorganize into private farms by 2006. By the beginning of 2006 more than half of the existing state farms were reorganized into private farms.
- The average procurement price for seed cotton (based on grade 2 class 5) equals Sum 430,000 per ton ($318/MT) as of April 2009.
- The state provides subsidies for irrigation, fertilizer, seed, and financing.
- Debts are written off based on special resolutions issued by the government. Most of the debt write-offs are associated with collective farms being restructured.

Soybeans

- Farmers interested in growing soybeans have been unable to obtain necessary land area. State orders dictate that all good land areas be strictly devoted to wheat and cotton production.
- The import tariff on oilseeds is 5%.

Sugar

- Zero tariff on imported raw and refined sugar.

Wheat

- The government of Uzbekistan controls planted area, production, and marketing of wheat, both in the domestic and international markets.

VIETNAM

The Government of Vietnam has many programs under which inputs such as seed, fertilizer, and irrigation water are subsidized. At the provincial level, seed are provided to farmers at subsidized rates. Fertilizer manufacturers and importers have access to low-interest credit. Approximately half of the cultivated land in Vietnam is irrigated and farmers pay a subsidized fee for using water for irrigation. The irrigation fee is set by each province under the guidelines of the Ministry of Water Resources. On average, farmers pay approximately half of the irrigation maintenance and operation costs.

Vietnam joined WTO on January 11, 2007 as the 150th member of the organization. Its commitments for joining WTO included reduction in tariffs, a ceiling on agricultural subsidies, and a phase out period for quota elimination.

Corn

- The tariff rate applied to corn (seed) imported from countries having MFN with Vietnam is 0%.
- Commercial production of genetically modified corn is anticipated in CY 2012/13. Currently large scale field trials are being conducted.

Cotton

- Vietnam has a guaranteed purchase price for seed cotton, as of April 2009 it was about \$0.38/kg (\$0.52/lb lint equivalent).
- Vietnam has a zero import tariff on cotton, but a five percent value added tax is assessed.

Rice

- From October 1, 2011 to September 2012, rice exporters should obtain a certificate of eligibility to be able to export rice. To be eligible for export, businesses are required to have (or lease): at least one rice storage warehouse with a minimum holding capacity of at least 5,000 tons, and at least one rice processing facility with a minimum of 10 tons/hour processing capacity. Exporters who fail to obtain a certificate of eligibility after September 2012 will not be allowed to export rice.
- The Vietnam Food Association's Minimum Export Price (MEP) is \$490/ton for 5% broken rice and \$470/ton for 25% broken rice on an FOB basis as of April 2011.
- Vietnam adopts a "3 Cut, 3 Up" policy to increase productivity while reducing costs: cutback on seeds, fertilizers and pesticides and increase productivity, quality, profit. With this policy, Vietnamese farmers on average receive 15% to 20% more profits and about a 5% rise in income.

Vietnam's finance ministry subsidizes interest rates for buying seedlings and fertilizers.

- Other measures used to support rice production and exports are: elimination of all taxes on farming machines/implements, and establishment of export promotion funds.
- On March 12, 2010, Vietnam’s prime minister announced a scheme that will allow Vietnamese farmers to receive at least a 30% profit from the sale of their paddy. Under this scheme, various provincial authorities would prescribe paddy prices to be sold to rice traders/millers that enable farmers to receive at least a 30% profit. The finance and agriculture ministries are tasked with calculating the costs in each region so appropriate paddy prices can be determined.

Soybeans

- The tariff rate applied to soybeans imported from countries having MFN with Vietnam is 0% with a 5% VAT.

Wheat

- The tariff rates applied to wheat (durum) and wheat flour imported from countries having MFN with Vietnam are 5% and 10%. A 5% VAT is applied if trading is done through an intermediate seller.

WEST AFRICA

The policies for West Africa pertain to Mali, Benin, Burkina Faso, and Chad. These countries have implemented structural change policies. Under these programs, all forms of government intervention, including commodity subsidies in different sectors, were eliminated. As members of the WTO and the Economic Community of West African States (ECOWAS), Benin, Mali, and Burkina Faso adopted protection policies that satisfy their commitments to both entities. The duty on agricultural products entering these countries has risen under the common external tariff, thus resulting in higher average applied MFN tariffs.

Corn and Sorghum

- Corn and sorghum in these four countries are subsistence crops and there is technical support available to producers through the development and dissemination of improved seed varieties.
- There is no official government policy regarding marketing or price fixation, but the governments maintain buffer stocks for cereals that are released in food shortages.

Cotton

- In Mali, cotton price is fixed early into the season that approximates the price that will be charged for the period (based on previous values of Cotlook Index A). A final price is calculated at the end of the season; if the final price is higher than the price set earlier, farmers receive additional payment. Gross earnings of the cotton sector are divided among cotton producers (60%) and the *Company Malienne pour le Development des Textiles* (CMDT) (40%).
- The farm gate prices for premium quality seed cotton in Mali and Benin for MY 2011/12 are 255 F CFA/kg ($0.51/kg) and 250 F CFA/kg ($0.5/kg), respectively. In Burkina Faso and Chad, prices for premium quality seed cotton for MY 2010/11 were 182 F CFA/kg ($0.36/kg) and 180 F CFA/kg ($0.36/kg), repectively.
- For MY 2010/11, the government of Burkina Faso announced an input subsidy of about $10 million.

Rice

- Rice producers in Burkina Faso and Mali are guaranteed a floor price
- In May 2008, Benin suspended the import duty on milled rice.

- Rice imports require a national conformity certificate to be allowed to enter Burkina Faso. On October 14, 2008, authorities in Burkina Faso agreed to extend for another 6 months the suspension of tariffs and VAT on rice imports.

Soybeans

- Under the ECOWAS common external tariff, bulk soybean imports are assessed a 5% import duty. Additional surtaxes may be applied depending on the country.

Sugar

- Sugar imports are subject to tariffs. For Mali, a 20% tariff is applied under the CET while a 55% special tariff is applied for sugar imported from outside the ECOWAS countries. Burkina Faso also applies a 20% tariff under the CET and an additional tax based on the reference value of imported sugar.

Wheat

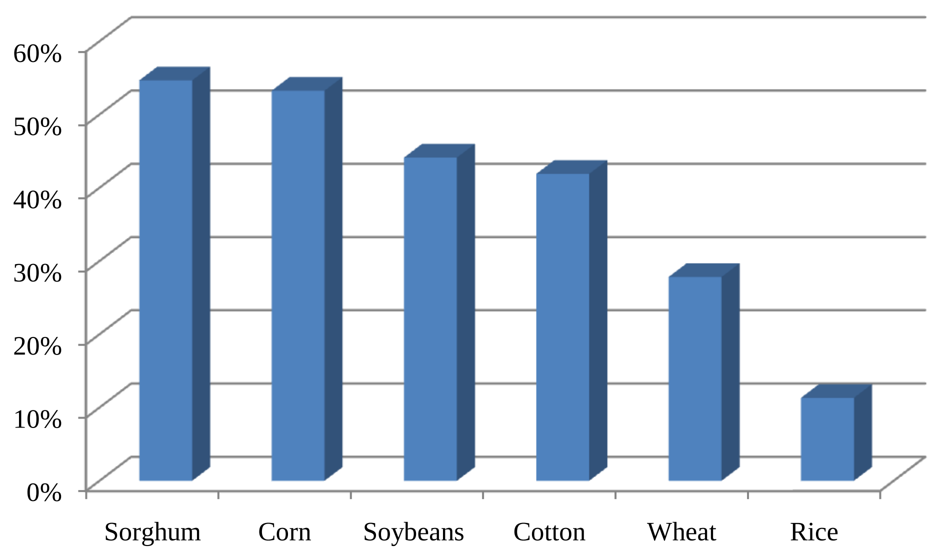
- Among the four countries, only Chad produces wheat on a limited basis. Almost all the wheat consumed is imported. Wheat falls into the category of non-sensitive good and is subject to import duty ranging between 5 and 10%, depending on the country. Additional taxes such as statistical tax (1%), community charge tax (1%), and other port charges may also apply.

CONCLUDING REMARKS

U.S. farmers account for about 1.1% of Gross Domestic Product (GDP) and make up about 1.58% of the total U.S. labor force (BLS, 2011; BEA, 2011). However, by including the activity of firms that assemble, process, and transform raw commodities into final products, agriculture and its related industries account for about 5% of GDP and about 14% of total U.S. employment[5].

For decades, the U.S. has been regarded as a dominant force in the world food and fiber market. The U.S. is currently the leading exporter of wheat, corn, soybeans, sorghum, and cotton and is the fourth largest exporter of rice (Figure 4). Exports of these and other agricultural products combine to make agriculture the only major U.S. industry with a trade surplus.

Figure 4. U.S. Share of Global Exports, MY 2010-11



Source: PS&D Database, FAS

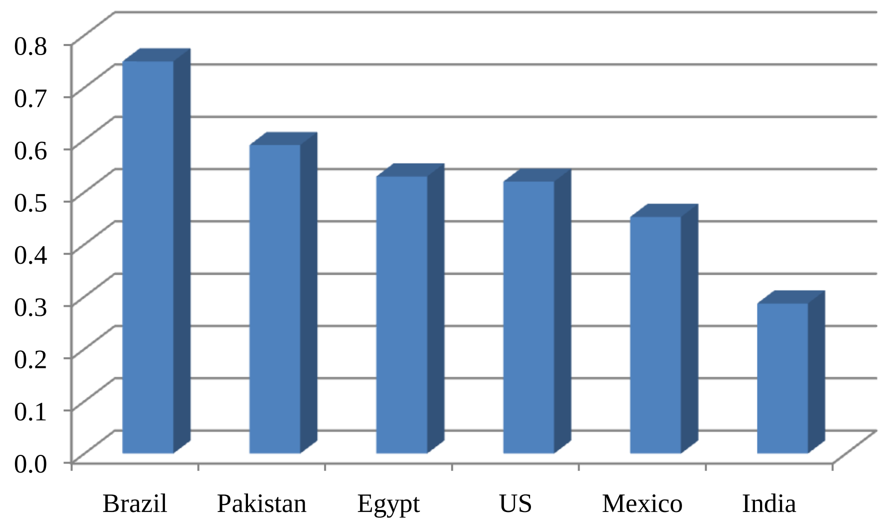
[5] Labor statistics are from ERS, "Farm and Farm Related Employment" (2007). Previous estimates of the contribution of agriculture to the U.S. economy attributed 12% of GDP to the agricultural sector. Recent revision by ERS in the methods used to calculate this statistic uses a narrower scope for agriculture and related industries and thus a smaller percentage contribution. See ERS, "Methodology notes for *Amber Waves* Indicators" for more information.

The vitality of U.S. agriculture has been questioned in recent years by such organizations as the World Bank, the International Monetary Fund, and OXFAM International (Panagariya, 2005). These institutions allege that agricultural subsidies and trade protection provided by the U.S. and other developed countries are hurting less developed nations. Recent WTO rulings on the U.S. cotton programs have augmented these contentions. There is no denying that agriculture in developed countries like the U.S. is protected and subsidized. But the implication has been drawn that agriculture subsidies are largely a developed country activity and developing countries do not protect and/or subsidize their agricultural sectors. This report attempts to shed light on this misconception by providing a compilation of various policies and programs that directly and indirectly influence the production, marketing, and trade of six agricultural commodities (corn, cotton, rice, sorghum, sugar, and wheat) in 21 foreign countries. These countries were selected to represent major players from both developing and developed countries.

Agriculture around the world has a long history of government intervention and remains a highly distorted sector of the world economy. One thing is obvious from this report: there is a great array of programs and combinations of programs that are used to achieve policy goals in different countries. There are common goals that all countries, regardless of stage of economic development, political philosophy, or natural resource endowment, seem to pursue. These include self-sufficiency in food production, safety of food supply, and the sustainability of natural resources. Yet while sharing common goals, the policies governments employ in pursuit of those goals are very diverse. While this report does not or cannot explain why such diversity exists, it does offer evidence of it.

That said, an overview of the evidence offered in the report suggests several generalizations. Most countries in the world, both developed and developing, use some form of guaranteed minimum price to the producers and use import tariffs or tariff-rate-quotas to protect domestic industries. The guaranteed minimum price is known by many names: loan rate in the U.S., intervention price in the E.U., minimum support price in India and Pakistan, and minimum floor price in China. In the case of cotton for instance, our findings reveal that the minimum support price in the U.S. is lower than that of other cotton producing countries (Figure 5).

Figure 5. Cotton Minimum Support Prices (cents/lb)*

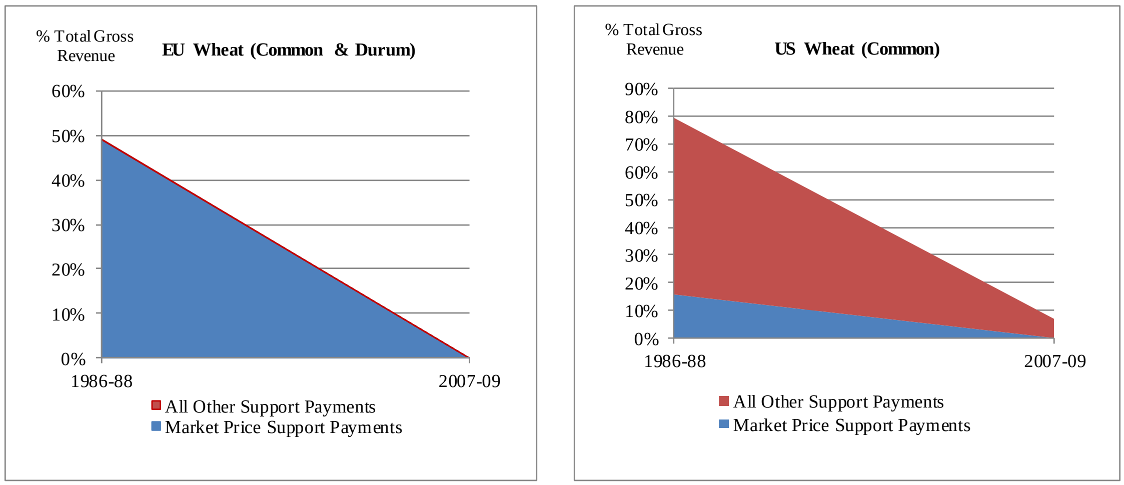


* Support prices for 2011 except for Brazil (2010/11) Pakistan (2008/9) and Egypt (2009). Support price for Mexico is the midpoint of a price range.

Sources: Various sources cited in this report.

However, developed/industrialized countries in recent years are moving away from price supports in favor of broader farm income support mechanisms and/or direct income payments as a means of supporting and stabilizing their agriculture sectors. The U.S. uses counter cyclical payments to supplement farm income in years of low prices and provides direct payments to farmers decoupled from farm production. Similarly, the EU is moving from commodity price support policies to an income support policy through decoupled payments. Figure 6 shows how support policies for wheat have shifted in the E.U. and the U.S. over the past two decades. The charts below graph all forms of governmental support for wheat as a percentage of total farm gross revenue. Contributions of price support programs as a percentage of gross farm receipts have decreased significantly. In addition, the overall level of support has declined in both cases meaning that a greater percentage of gross receipts are coming from the marketplace.

Figure 6. Evolving Support Programs*



*All other support payments include payments based on output, payments based on input use, payments based on current area (production required), payments based on non-current area (production required) according to OECD nomenclature.

Source: OECD Database, 2009

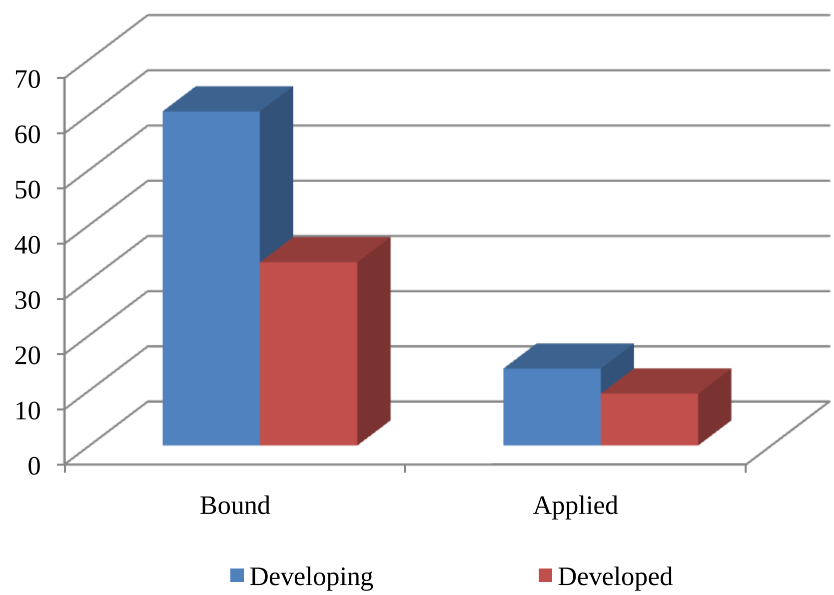
Japan also implemented a new farm program that replaced the commodity-based farm payments, which included producer quotas, income stabilization policies, deficiency payments, and the rice diversion program, with targeted direct payments. Yet these generalizations regarding developed countries' farm programs do have notable exceptions. For example, Australia provides no price support programs or direct income payments for its agricultural producers.

If we consider *per unit* price or income support, the extent of support may be higher in the developed countries than in the developing countries. But major developing countries supplement their price support programs with a sizable amount of input subsidies to protect their agriculture sectors. For example, India provides annual subsidies of $12 billion for food storage and distribution, fertilizer, water, and electricity (Landes, 2004). For grains alone, China provided $20.3 billion in seed, machinery, fuel subsidies and direct payments in 2010, up from $15.7 billion in 2007 (FAS, 2011). Brazil, a rising force in the world agricultural market, allocated $64 billion in various forms of credit assistance and agricultural production insurance in its 2010/11 Agriculture and Livestock Plan (PAP) (FAS, 2011).

Input subsidies given by developing countries are exempt from inclusion in the Aggregate Measure of Support (AMS) because of "special and differential" treatment, and thus not subject to reduction commitments. Apart from this, developing countries prefer to subsidize inputs rather than support output prices because they are easy to implement and can be enacted at the source. Unlike price support programs, input subsidies keep domestic food prices low, which is politically popular.

It is clear from this report that both developed and developing countries extensively use import tariffs to protect their agriculture sectors. But an interesting point is that average bound/applied tariffs for agriculture are higher in major developing countries than in the developed countries. In 2009, the average applied tariff rates were 4.7% for the U.S. and 13.5% for the EU. For major developing countries like India and China, the average applied tariff rates for agriculture were 31.8% and 15.6% in the same year. Even countries like Mexico (22.1%), Brazil (10.2%), and Thailand (22.6%) also had higher average applied tariff rates for agriculture than that of the U.S. and the E.U. The differences are even more pronounced when one compares average bound tariff rates for agriculture between major developed and developing countries (Figure 7).

Figure 7. Average Bound and Applied Tariffs for Agriculture: Developed and Developing Countries, 2009



Source of basic data: World Bank (permanent URL http://go.worldbank.org/LGOXFTV550)

It is also worth mentioning that developed countries allow a greater number of agricultural products to enter their markets duty-free than do developing countries. Both the U.S. and the E.U. allow around 30% of agricultural products to enter without any tariffs at all, whereas for most developing countries that share is less than 10% (WTO, 2010).

Sanitary and phytosanitary (SPS) regulations have been frequently used by countries in the past to restrict trade [6]. As the crop tables of this report show, the use of SPS measures are more frequent among developing countries than in developed countries. For example, in the last few years Brazil has cited concern over possible contamination by weed seeds to restrict wheat imports from the United States. Russia has completely shut off rice imports citing the need to upgrade its inspection stations with more modern equipment that can better insure the quality and safety of imports.

Finally, it is important to note the differences that exist between developed and developing countries in the areas of environmental regulations and labor standards. The implementation of policies that protect both the environment and workers will likely impose additional costs on agricultural producers. On the environmental front, this would include such programs as those that affect the use and management of pesticides, fertilizers, water resources, and air quality. In the area of labor standards, minimum wage legislation, workplace safety standards, freedom from forced labor, and basic union rights are policies that promote the health and well-being of the work force. It has been argued that the cost savings from lax or nonexistent environmental and workforce protection policies in developing countries may be a source of competitive advantage for their producers. In effect, low standards in these areas may be considered a form of subsidy in that they represent costs that producers in developing countries do not have to bear. The presence and enforcement of environmental and worker standards increases the cost of production of producers in developed countries who must abide by them.

[6] SPS provisions allow a country to take measures to protect human, animal, and plant life and health from foreign pests, diseases, and contaminants.

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