

Developing Countries Become Major U.S. Farm Market

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USDA Information Spec.

The destinations and distribution of U.S. agricultural exports are changing, with the less developed countries of the world assuming an increasingly prominent role in U.S. trade fortunes.

For each of the last 3 years, more U.S. grains and feed were purchased by the less developed countries (LDC's) than by the traditionally larger markets of Western Europe, Japan, Canada, and the other "developed" nations.

For U.S. oilseeds, it's still the developed nations that take the lion's share (roughly two-thirds) of our exports, but their purchases have dropped sharply. Meanwhile, U.S. shipments to the LDC's are holding near record levels.

"The composition of U.S. export markets has shifted, perhaps

permanently," notes USDA economist Steve MacDonald in a recent issue of the department's FARMLINE magazine. He says this shift toward a bigger role for the LDC's has been one of the more important trends in U.S. agricultural trade over the past decade.

Data from MacDonald and other trade analysts of USDA's Economic Research Service reveal the extent of this shift in the U.S. customer base.

In fiscal 1975, just over half of total U.S. grain and feed exports went to a relative handful of buyers that economists classify as the developed nations. The remaining portion was sold, mainly in smaller quantities, to more than 100 LDC's and several centrally planned countries.

By last year (fiscal 1985), the

distribution had changed significantly. Less than two-fifths of U.S. grain and feed exports went to the developed nations, while slightly more than two-fifths went to the LDC's. Centrally planned markets (the USSR, Eastern Europe, and China) took about one-fifth of the total.

Although purchase volume has dropped sharply in the last few years for all three categories of buyers, the largest and most sustained declines have come in our developed country markets. From a fiscal 1980 peak of nearly 51 million metric tons of U.S. grains and feeds, our exports to the developed nations dropped by more than 30 percent to less than 35 million tons last year. That was the lowest volume in more than 10 years.

Oilseeds and products rank

second only to grains in generating export revenues for U.S. agriculture. In oilseeds, the developed nations remain the largest U.S. customers by a wide margin — yet the LDC's have been closing the gap as imports by the European Community and Japan have declined.

In fiscal 1975, more than 80 percent of U.S. oilseed export volume went to the developed nations, and only about 12 percent to the LDC's. By 1985, the share of U.S. oilseeds going to the LDC's had more than doubled to 30 percent.

Trade analysts recognize that Western Europe, Japan, Canada, and several other developed markets will remain among the top customers for U.S. agricultural exports. The analysts suggest, however, that the potential for

future export growth is probably greater among the LDC's, as a group, than among the developed nations.

The reasons include faster population growth in the LDC's, faster growing economies in many cases (Taiwan and South Korea being prime examples), the prospective need for more feed grains and oilseeds to support emerging meat animal sectors, and resource limitations that may preclude agricultural self-sufficiency. In addition, the populations of the LDC's are not as well fed as people in developed nations, so they tend to spend a fairly large portion of any additional income on food.

"Our traditional customers remain very important," concludes MacDonald. "But we also have to recognize the increased role of our important Third World customers and the large potential role of the rest of the less developed world. Self-interest alone dictates that we pay close attention to their various needs and concerns in such areas as open markets for their products, debt relief, and economic development."

Glatfelter Offers Seedlings

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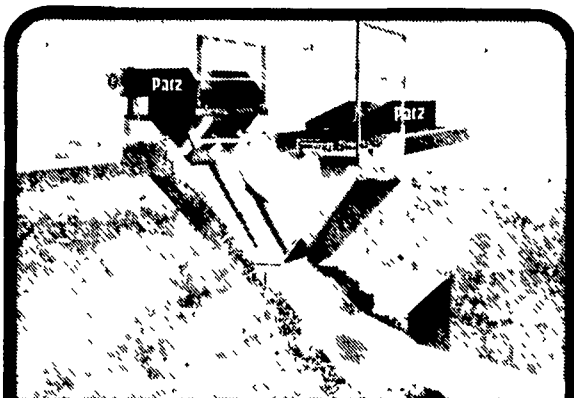
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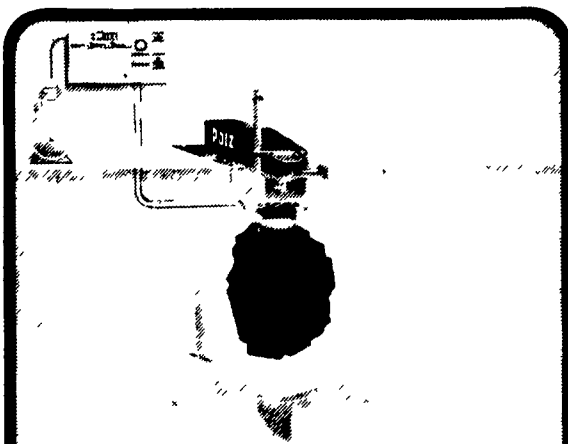
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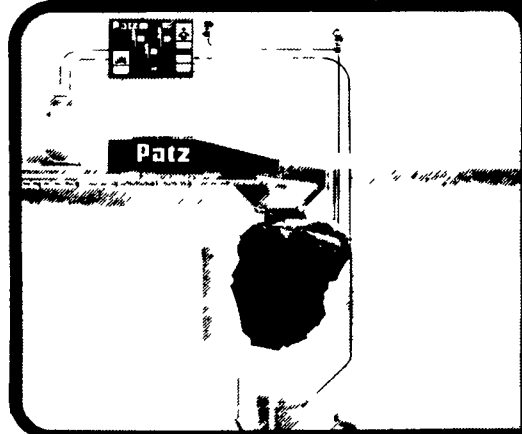
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