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## **Brazil**

## **Tomatoes and Products**

## **Annual**

## **2002**

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### **Report Highlights:**

**Post is estimating a 5-percent increase in total Brazilian tomato production in 2002 to 3.2 million tons. The increase is due to a 7.7 percent increase in area planted. The tomato crop suffered from climatic and pest problems, particularly in Sao Paulo. Total Brazilian tomato production for 2003 is forecast to increase 2 percent to 3.27 million tons, as planting for processing is forecast to increase 5 percent.**

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Includes PSD changes: Yes  
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Annual Report  
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## **Executive Summary**

Post is estimating a 5-percent increase in total Brazilian tomato production in 2002 to 3.2 million tons. Production increased in 2002 due to a 7.7-percent increase in area planted. The tomato crop suffered from climatic and pest problems in various regions. Total Brazilian tomato production for 2003 is forecast to increase 2 percent to 3.27 million tons, as planting for processing is forecast to increase 5 percent.

The white fly which transmits the gemini virus continues to cause considerable damage to production in Sao Paulo. More than half of Sao Paulo's table tomato crop will be lost this year due to the pest. The most affected region this year is Campinas, where 6,000 hectares are planted to tomatoes. Until the pest problems are brought under control, tomato production in the region is expected to be reduced considerably.

## **Economic Overview**

In the past decade, Brazil has undertaken a number of economic reforms that dramatically reduced inflation and opened the economy to private sector investment. In 1994, Brazil initiated an economic stabilization program known as the Real Plan, which was highly successful in reducing longstanding inflation. The plan also inaugurated one of the world's largest privatization programs. However, when growth slowed, the economy's dependence on external financing and the government failure to control its finances, left the economy vulnerable to external shocks. In 1999, the government was forced to float and devalue the real. Since 1999 the government has been dedicated to fiscal discipline, highlighted by the passage in May 2000 of the Fiscal Discipline Law, which sets strict limits on government spending at the federal and sub-federal level. The government also initiated an inflation-targeting program as the basis of monetary policy, wherein the government sets a target and the Central Bank strives to keep inflation within a band around the target. While many changes have been implemented, the government needs to continue its economic reform program, notably tax and pension reform.

After a strong economic performance in 2000, the Brazilian economy was hampered by several factors in 2001, most notably an economic crisis in Argentina, falling growth in the major world economies, a serious electricity shortfall in Brazil, and the effects of the September 11 terrorist attacks. The exchange rate weakened appreciably, increasing inflationary pressure which rose to 7.7 percent. Higher interest rates (to counter inflationary pressures), electricity rationing, and weakening consumer confidence affected economic activity, and GDP expanded by only 1.5 percent in 2001. The Brazilian government made several economic adjustments in 2001 in response to the economic shocks, renewing its agreement with the IMF, tightening fiscal discipline, and drawing on international reserves to provide limited support to the exchange rate. These measures helped strengthen investor confidence, and when Argentina defaulted in December 2001, the Brazilian real actually strengthened.

The first quarter of 2002 was relatively calm, and economic activity showed signs of picking up. However, beginning in the second quarter, investor confidence fell because of uncertainty about the 2002 presidential election and whether the new president, who takes office in January 2003, will be able to service the Brazilian government's sizeable debt burden. Turbulent international financial markets and doubts about economic recovery in the United States have added to the pressure on the Brazilian financial market. The exchange rate again weakened and Brazil risk premiums for international borrowing increased. In August 2002 Brazil reached an agreement with the IMF for a new \$30 billion program that extends through 2003. However, the financial markets remained under pressure through September, when the exchange rate fell 25 percent in one month. Given the economic uncertainty, growth will again be modest in 2002 probably around 1.3 percent. Inflation for 2002 is projected at close to 11 percent.

## Production

### Total Tomato Production

Post is estimating a 5-percent increase in total Brazilian tomato production in 2002 to 3.2 million tons. Production increased in 2002 due to a 7.7-percent increase in area planted. The tomato crop suffered from climatic and pest problems in various regions. Total Brazilian tomato production for 2003 is forecast to increase 2 percent to 3.27 million tons, as planting for processing is forecast to increase 5 percent.

The white fly which transmits the gemini virus continues to cause considerable damage to production in Sao Paulo. More than half of Sao Paulo's table tomato crop will be lost this year due to the pest. The most affected region this year is Campinas, where 6,000 hectares are planted to tomatoes. Weather difficulties exacerbated the problem, as heavy rains in the spring and a hot summer drought left the fruit more vulnerable, less resistant to travel, and of poor color. Production which typically ranges from 280-320 boxes per thousand feet will fall to only 100-150 boxes per thousand feet this year. Until the pest problems are brought under control, tomato production in the region is expected to be reduced considerably.

The fly first appeared in Brazil in 1989, and the climactic conditions in Brazil encouraged its spread. The gemini virus attacks both the fruit and the plant, slows plant growth, drastically reduces productivity, reduces fruit size, causes white lumps inside and yellow blotching on the fruit and leaves. The drought escalated the white fly population, as white flies do not prosper in wet conditions. Although there are white-fly resistant tomato varieties available, many farmers prefer to plant conventional varieties due to their higher yields and costs for battling the pests are often prohibitively high. If the pest remains problematic, producers are likely to reduce acreage while battling the issue and shift to more resistant varieties.

Due to the growth potential for Brazilian consumption, Brazilian agricultural institutes and seed research companies have invested considerable resources to develop new and improved tomato varieties during the last 20 years. These efforts have spurred the growth in yields in Brazil. New varieties and greater use of inputs and technology are boosting productivity, as is evidenced in the chart below. Productivity gains were weaker in 2001 due to climatic and pest problems, such as excessive rains, droughts, and the gemini virus spread by white flies. Furthermore, many of the regions facing problems with the white fly have adopted pest resistant varieties which have lower yields.

### Average Yield of Brazilian Tomato Production (kg/ha): 1997-2002

1998	1999	2000	2001	2002
44,032	50,369	53,263	53,784	52,892

Source: IBGE

Brazilian tomato production is expected to increase in 2003, particularly for processing tomatoes. An increase in production is also expected due to increased success in fighting pests in some regions. New higher-yielding tomato

varieties are expected to further boost yields and production.

There are no official Brazilian statistics distinguishing processing and table tomatoes. Tomatoes can be grown in many regions of Brazil, and a favorable climate allows for production throughout the year. Production is greatest in regions with milder winters and low chance for frost. Summer production poses greater risks for disease and fruit set problems, and is concentrated in higher elevations. The cost of production for tomatoes is very high, as it entails heavy use of labor and imported inputs, such as seeds, fertilizer and chemicals. Many input costs are U.S. dollar-based, and the depreciation of the Brazilian currency relative to the U.S. dollar has further elevated production costs.

### **For Fresh Consumption**

There are no official numbers on table tomato production. According to industry contacts, tomatoes for fresh consumption account for 60 percent of total Brazilian tomato production. However, the percentage of production for processing tomatoes has been increasing, and is expected to continue growing.

The state of São Paulo (SP) remains the principal producer as well as the major consumer market for table tomatoes in Brazil. Although, neighboring states have been increasing shipments of table tomatoes to São Paulo, due to growing demand.

### **For Processing**

Tomatoes are produced throughout Brazil, primarily for the consumption of fresh tomatoes, but there are three regions within Brazil that are commercially important for processing tomatoes. These are:

- Region 1: the states of Bahia (BA) and Pernambuco (PE) in the northeast region (planting in March-May, harvesting in June-October),
- Region 2: the states of Goiás (GO) and Minas Gerais (MG) in the center of the country (planting in March-June, harvesting in June-October), and
- Region 3: the state of São Paulo (SP) in the center-south region (planting in February-June, harvesting in June-November).

Based on official Brazilian statistics (IBGE), these three regions account for roughly 75 percent of all tomato production in Brazil, and virtually all the processing tomato production.

Tomato production declined in Region 1 due to the expansion of more profitable fruit production (bananas, grapes, mangoes, guavas) in the region and disease/pest problems, particularly with the white fly. The increased cost of pesticides and other inputs to combat the problem elevated the production costs for industrial tomatoes. Tomato production is starting to make a slight comeback in the Northeast, particularly in the San Francisco valley between the states of Pernambuco and Bahia. Producers have adopted an American white-fly resistant tomato variety, "gemini pryde." Two years ago, 396 small and medium-sized farmers in the region purchased a processing plant. Last year, the plant converted 50,000 tons of tomatoes into fruit pulp and earnings reached R\$6 million (roughly US\$2.5 million).

Production of processing tomatoes in Region 3 is expected to gradually decrease over the long-term due to competition for area by other crops, urban encroachment, and subsequent increases in land values. Disease and pests are also a problem in this area and the cost of keeping these under control reduces the cost incentive to continue to grow processing tomatoes there.

Tomato producers and the processing industry continue to migrate to the center-west, particularly to the State of Goias due to financial incentives and favorable growing conditions. Financial incentives include lower taxes and easier access to long-term financing with low interest rates. Furthermore, farmers are enticed by lower production costs and cheaper land prices.

Based on industry estimates, Post estimates a 2-percent increase in processing tomato production in 2001 to 1.26 million tons. Producers are expected to increase acreage due to improved prices and sales. Production is expected to further increase due to higher yields and better varieties and improved technology. However, expansion is constrained by slow growth in consumption and inability to quickly expand processing capacity.

### **Tomato Paste Production**

Since no official data on tomato products exists in Brazil and there is not a good match between terms used in Brazil and those used in the United States, it is difficult to estimate production numbers for tomato paste. In general, industry contacts indicate that 70-75 percent of domestic production of processing tomatoes goes into paste and "extratos" and "puree" and the remainder goes into sauces. Brazilian production of tomato paste is estimated at 130,000 tons in 2001, and forecast to remain at that level for 2002. The majority of the paste is used in further processing for consumer-ready sauces and other such products.

### **Canned Tomato Production**

Both Brazilian production and consumption of canned tomatoes are very low. What little production exists is used in the form of diced tomatoes which is further processed into consumer-ready sauces and other such products. Consumer-ready sauces in the supermarkets in Brazil tend to be very smooth, including the sauces with additional ingredients and flavorings, reflecting Brazilian consumer preference. In general, Brazilian consumers do not use canned tomatoes in cooking at home either. The very small amount of canned tomatoes that are on the supermarket shelves are either from Italy or Argentina.

## Consumption

### Demographic Trends and Tomato Product Consumption

Prior to the introduction of the economic stabilization program in 1994, sales of tomato products had been basically flat. However, since the introduction of the Real Plan until the January 15, 1999, devaluation of the Brazilian currency, there had been an increase in consumer purchasing power and a fundamental shift in consumer preference toward ready-to-eat and "semi-ready-to-eat" foods in Brazil. This in turn has led to increased consumption in prepared tomato-based products such as "ethnic" sauces for cooking meats, and for pasta, and ketchup. In addition to increased purchasing power, Brazilians have less time to go shopping for fresh produce, more women are entering the work force, more people are working "9-to-5" jobs, fewer people have time to go home for lunch and are eating fast food for lunch, fewer people have full-time maids to do the cooking, and urbanization is increasing. In addition, increasing consumption of fast food (pizzas, hot-dogs, hamburgers) has also increased demand for tomato products. Consumption of gourmet tomato products, such as sundried tomatoes, is also rising quickly in Brazil, although from a low base.

The recent changes in Brazilian consumer habits and lifestyles are expected to continue to drive consumption trends in Brazil over the long term. Although short-term economic factors have slowed growth in consumption of tomato-based products, consumption should recover and grow at a healthy pace with economic recovery.

### Fresh Tomato Consumption

Per capita tomato consumption is fairly low in Brazil, particularly for fresh tomatoes. According to Ceagesp (A Sao Paulo based Agricultural Institute), Brazilian per capita tomato consumption is 6.3 kilos per year, while per capita consumption in Norway, Greece, Switzerland, and other countries exceeds 40 kilos per year. Brazilian fresh tomato consumption should increase with economic growth, improvement in varieties, and quality control.

## Trade

Historically, the majority of Brazilian imports of tomato products is in the form of tomato paste (imported paste is 28-32 Brix) which is used to supplement domestic production and is further processed in Brazil into consumer-ready sauces and other similar products. However, in the last few years, there has been an increase in the imports of consumer-ready sauces as shown in the trade data below. Most Brazilian imports of tomato paste, when they occur, enter the country during the first half of each calendar year after the Brazilian harvest has already been processed and subsequently used in the production of finished products (harvesting in Brazil ends in October/November).

In the past, the vast majority of Brazilian imports of tomato products have come from Chile, as they are the largest and most efficient producer in the region. Imports of most tomato products dropped considerably in 1999 because the January 1999 devaluation of the Brazilian currency increased the cost of imported products. Conversely, Brazilian exports of fresh tomatoes, primarily to neighboring countries, increased in 1999 as the devaluation made Brazilian products more competitive.

Brazil's fresh tomato imports, which were primarily sourced from other South American nations, have dropped considerably in recent years. The European Union is currently the largest source of Brazil's fresh tomato imports. The vast majority of Brazil's fresh tomato exports are destined to MERCOSUL nations. African nations, particularly former Portuguese colonies, occasionally import small quantities of fresh Brazilian tomatoes.

The United States is the leading supplier to Brazil of ketchup in containers of less than 1 kilogram. However, U.S. ketchup exports have dropped considerably since 1998, perhaps due to increasing Brazilian imports of bulk ketchup which is repackaged in Brazil.

## Tariffs

Brazil is a member of MERCOSUL, which is comprised of Brazil, Argentina, Uruguay, and Paraguay. Countries within MERCOSUL enjoy duty-free access for most agricultural products traded within the trading bloc, while a Common External Tariff (CXT) is applied for non-MERCOSUL countries. The CXT puts U.S. agricultural products at a competitive disadvantage. The MERCOSUL's Common External Tariff (CXT) was lowered one percent in January 2002.

As of January 2002, Brazil's applied Common External Tariff (CET) rates for non-MERCOSUL trading partners for selected tomato products are:

HS code:	0702.00	11.5 percent
	2002.10	15.5 percent
	2002.90	15.5 percent
	2103.20.10	19.5 percent
	2103.20.90	17.5 percent

U.S. agricultural products also face a Merchant Marine Tax, which is a 25-percent surcharge on the value of the freight for imports of all products (Note: this measure has been waived for imports to the North/Northeast regions of Brazil in order to stimulate development in the region).

Brazil's tariff rates for MERCOSUL partners (Argentina, Uruguay, Paraguay) are:

HS code:	0702.00	0 percent
	2002.10	0 percent
	2002.90	0 percent
	2103.20.10	0 percent
	2103.20.90	0 percent

Chile and Bolivia are associate members of MERCOSUL and receive preferential reductions of duty from the CET.

## **Other**

### **Loss Rates**

Product loss for tomatoes in Brazil is falling due to the adoption of long life and more transport resistant varieties. Loss rates have dropped from more than 40 percent to an estimated 20 percent, according to industry contacts. Improper handling continues to be the main reason for losses. The common forms for packing and packaging are common causes for product damage. Tomatoes are generally packed in wooden “K boxes,” which are often infested with harmful bacteria and mold. The tomatoes are easily contaminated. Furthermore, the tomatoes on the bottom of the crates are crushed, thereby accelerating the rotting of the fruit.

### **Industry Terms and Standards**

Terms for the different classes of products are used differently in Brazil than they are in the United States and this could cause some confusion. In both the United States and Brazil, paste is considered to be a product that has 28-32 Brix; generally 31 in Brazil.

Brazil also has a class of products that are called “extratos” or extracts. Extratos have 21 Brix and can be considered a “semi-concentrated” product. Puree would probably be the most similar product in the United States. The difficulty is that paste and extratos are considered one class of products by the industry and trade and it is difficult to make a distinction between the two in the case of Brazil. In general, it can be assumed that imported paste is 28-32 Brix but domestic production will include products that are 28-32 Brix and products that are 21 Brix.

To further confuse the issue, Brazil also has a class of products termed “puree,” which has 12 Brix and is analogous to tomato sauce in the United States. Finally, there are “sauces” which also have 12 Brix but have other ingredients or flavorings in them and are more consumer-ready than the other classes of products.

## PS&D Tables

### Fresh Tomatoes PS&D

PSD Table						
Country	Brazil					
Commodity	Fresh Tomatoes				(HA)(MT)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2002		01/2003
Plnt For Fresh Consump	0	38454	0	38500	0	38500
Plnt For Processing	0	19400	0	23800	0	25000
TOTAL Area Planted	0	57854	0	62300	0	63500
Harv. For Fresh Cons.	0	37672	0	38000	0	38000
Harv. For Processing	0	18900	0	23000	0	23500
TOTAL Area Harvested	0	56572	0	61000	0	61500
Fresh Sale Production	0	1802705	0	1800000	0	1803000
Processing Production	0	1240000	0	1400000	0	1470000
TOTAL Production	0	3042705	0	3200000	0	3273000
TOTAL SUPPLY	0	3042705	0	3200000	0	3273000

### Tomato Paste PS&D

PSD Table						
Country	Brazil					
Commodity	Tom. Paste,28-30% TSS Basis				(MT)(MT, Net Weight)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		01/2002		01/2003		01/2004
Deliv. To Processors	0	0	0	0	0	0
Beginning Stocks	4499	1599	6399	4499	0	6399
Production	130000	130000	0	130000	0	130300
Imports	400	400	0	400	0	300
TOTAL SUPPLY	134899	131999	6399	134899	0	136999
Exports	1000	1000	0	1000	0	1050
Domestic Consumption	127500	126500	6399	127500	0	128000
Ending Stocks	6399	4499	0	6399	0	7949

TOTAL DISTRIBUTION	134899	131999	6399	134899	0	136999
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### Canned Tomatoes PS&D

PSD Table						
Country	Brazil					
Commodity	Canned Tomatoes				(MT)(MT, Net Weight)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		01/2002		01/2003		01/2004
Deliv. To Processors	0	0	0	0	0	0
Beginning Stocks	360	360	210	210	210	210
Production	2600	2600	2800	2800	0	2850
Imports	6200	6200	6200	6200	0	6000
<b>TOTAL SUPPLY</b>	<b>9160</b>	<b>9160</b>	<b>9210</b>	<b>9210</b>	<b>210</b>	<b>9060</b>
Exports	200	200	200	200	0	175
Domestic Consumption	8750	8750	8800	8800	0	8785
Ending Stocks	210	210	210	210	0	100
<b>TOTAL DISTRIBUTION</b>	<b>9160</b>	<b>9160</b>	<b>9210</b>	<b>9210</b>	<b>0</b>	<b>9060</b>

### Prices

#### Estimated Tomato Production Cost Comparison – 2002 Crop Year

Factor/State	Table Tomatoes (Minas Gerais)	Tomatoes for Processing (Goias)
	2002	2002
<b>Total Costs (R\$/ha)</b>	24,208	5,779
<b>Income (R\$/ha)</b>	29,670	6,500
<b>Net Income (R\$/ha)</b>	5,462	721
<b>Margin (%)</b>	18.4	11.1

Source: FNP Consultoria

**Tomato Prices (Santa Cruz variety) Ceasas centavos/kg**

Brasilia:												
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	66	62	58	68	70	52	53	43	29	28	n/a	n/a
2002	n/a	64	74	59	54	64						
Belo Horizonte:												
2001	39	34	31	43	47	32	34	27	17	17	n/a	n/a
2002	n/a	37	36	46	33	43						

Source: FNP Consultoria and SIMA

**Salad Tomato Prices (Ceagesp - Sao Paulo) centavos/kg**

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2001	64	58	66	79	73	51	54	52	51	48	49	62
2002	54	62	64	79	59	71	74	63				

Prices refer to tomatoes comercializes at CAEGESP in Sao Paulo only.

Source: CAEGESP, Boletim Mensal

## Trade Tables

### Imports

**Brazil: Imports of Tomatoes, by Country of Origin, Annual Data for 1999-2001, Jan-Oct for 2002, Volume (kilograms) and Value (US\$1,000)**

0702 Tomatoes, Fresh or Refrigerated								
Brazil Imports								
Country	(January - December)						(Jan-Oct)	(Jan-Oct)
	Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value
	Kg	US \$1000	Kg	US \$1000	Kg	US \$1000	Kg	US \$1000
	1999	1999	2000	2000	2001	2001	2002	2002
Netherlands	8150	16	8029	16	4334	7.4	0	0
Venezuela	0	0	79040	7	0	0	0	0
Italy	0	0	884	2	0	0	0	0
Spain	0	0	375	0.7	0	0	0	0
Belgium	0	0	100	0.2	0	0	0	0
Argentina	0	0	25	0.05	0	0	41160	7.4
United States	88	0.4	0	0	0	0	0	0
<b>WORLD TOTAL</b>	<b>10438</b>	<b>17</b>	<b>88453</b>	<b>26</b>	<b>4334</b>	<b>7.4</b>	<b>41160</b>	<b>7.4</b>

Source: World Trade Atlas ( Ministry of Development, Industry, and Commerce)

## Exports

## Brazil: Exports of Tomatoes, by Country of Origin, Annual Data for 1999-2001, Jan-Oct for 2002, Volume (kilograms) and Value (US\$1,000)

0702.00 Tomatoes, Fresh or Refrigerated								
Brazil Exports								
	(January - December)						(Jan-Oct)	(Jan-Oct)
Country	Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value
	Kg	US \$1000	Kg	US \$1000	Kg	US \$1000	Kg	US \$1000
	1999	1999	2000	2000	2001	2001	2002	2002
Argentina	51662973	11454	19032092	4591	11130826	3019	3680924	862
Uruguay	3259620	969	936810	223	544006	91	158309	40
Paraguay	30900	8	42834	9.4	16001	11	16001	11
Angola	0	0	800	0.5	11000	8	3800	3
WORLD TOTAL	54957216	12432	20012536	4824	11701833	3129	3843513	906

Source: World Trade Atlas ( Ministry of Development, Industry, and Commerce)