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## Australia

## Dairy and Products

## Annual

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### Report Highlights:

Australia's milk production in 2002/03 is forecast at a record 11, 723 TMT, one percent above last year's output and roughly in line with ABARE's projection of a two percent rise. Current drought conditions are expected to constrain further growth in milk output. Significant production growth is predicted in 2002/03 for all major dairy product categories. High production levels and relatively high stocks of dairy products are expected to lead to sharply higher exports of these products in 2002/03.

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
Annual Report  
Canberra [AS1], AS

Executive Summary .....	1
Dairy, Milk, Fluid .....	3
Production .....	3
General .....	3
Productive Factors .....	4
Consumption .....	4
Trade .....	5
Policy .....	6
Prices .....	6
Cheese .....	8
Production .....	8
Trade .....	9
Butter .....	11
Production .....	11
Trade .....	12
Milk Nonfat Dry Milk Powder .....	14
Production .....	14
Trade .....	15
Dry Whole Milk Powder .....	17
Production .....	17
Trade .....	18

## **Executive Summary**

Australian milk production for 2001/02 is estimated at 11,607 TMT, an increase of seven percent on the previous year and in line with Australian Dairy Corporation (ADC) figures. The increase was driven by a five percent increase in cow numbers and a slight increase in yield per cow. Anecdotal evidence suggests that average butterfat content could have increased significantly as producers increased the use of grain rations under worsening drought conditions. This level of milk production surpasses the previous record of 11,172 TMT produced prior to industry deregulation in 1999/2000.

Milk production for 2002/03 is forecast to increase one percent to 11,723 TMT, surpassing the previous year's record level of production. This production increase falls below ABARE's forecast increase of two percent. Post's production forecast takes into account worsening drought conditions, shortages of irrigation water and tight fodder supplies at time of writing this report. Post has forecast a three percent increase in cow numbers in line with ABARE, but has milk yield falling slightly.

ABARE's forecast for 2002/03 is for production increases in all major dairy product categories including a five percent increase for cheese, seven percent for butter, five percent for WMP and nine percent for SMP. These rises would not seem to fit with ABARE's forecast milk production increase of only two percent. Industry sources believe, however, that this apparent discrepancy could occur given higher average fat levels in milk and perhaps lower average fat levels in manufactured products. Post expects the degree to which this could occur as unlikely and, thus, the production forecasts for cheese and SMP, the two largest users of manufacturing milk, have been trimmed somewhat. Market milk production and consumption remain relatively flat.

Total cheese production in 2001/02 is estimated by post at 424 TMT, up 13 percent from the 374 TMT reported by ADC for 2000/01. ADC figures for the period July 2001 to March 2002 show a 17.6 percent increase in cheese production. However, with the onset of drought conditions, post has discounted this increase for the final quarter, estimating a 13 percent total increase for the 2001/02 year.

Cheese production is forecast to remain flat in 2002/03 at 424 TMT, despite ABARE's forecast five percent increase. Higher stock levels, lower export prices and a smaller than expected increase in milk production are expected to constrain any increase in cheese production for 2002/03.

Post forecasts cheese exports to increase 10 percent to 220 TMT in 2002/03. This is contrary to ABARE's forecast of a one percent fall in exports. Post advises that much of the increase in milk production experienced in 2001/02 was processed into cheese resulting in much higher ending stocks. Post anticipates a large proportion of stored cheese will become available for sale in 2002/03 and with domestic consumption likely to remain flat, exports are expected to increase significantly in 2002/03 and beyond.

Butter production is estimated to have increased four percent in 2001/02 to 166 TMT. Butter production is forecast to rise seven percent to 179 TMT in 2002/03, in line with ABARE's forecast.

SMP production for 2002/03 is forecast to increase five percent to 286 TMT. This forecast is lower than the nine percent increase forecast by ABARE which post considers too high given the modest increase in whole milk production for 2002/03.

Whole milk powder (WMP) production is estimated to have risen only one percent to 207 TMT in 2001/02 and is forecast to increase three percent in 2002/03.

## Dairy, Milk, Fluid

### Production

PSD Table						
Country	Australia					
Commodity	Dairy, Milk, Fluid				(1000 HEAD)(1000 MT)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Cows In Milk	2281	2281	2289	2401	0	2477
Cows Milk Production	10864	10860	11404	11607	0	11723
Other Milk Production	0	0	0	0	0	0
TOTAL Production	10864	10860	11404	11607	0	11723
Intra EC Imports	0	0	0	0	0	0
Other Imports	4	4	4	3	0	3
TOTAL Imports	4	4	4	3	0	3
TOTAL SUPPLY	10868	10864	11408	11610	0	11726
Intra EC Exports	0	0	0	0	0	0
Other Exports	77	77	74	80	0	80
TOTAL Exports	77	77	74	80	0	80
Fluid Use Dom. Consum.	1976	1978	1986	1957	0	1962
Factory Use Consum.	8815	8809	9348	9573	0	9684
Feed Use Dom. Consum.	0	0	0	0	0	0
TOTAL Dom. Consumption	10791	10787	11334	11530	0	11646
TOTAL DISTRIBUTION	10868	10864	11408	11610	0	11726
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

### General

Australian milk production for 2001/02 is estimated at 11,607 TMT, an increase of seven percent on the previous year and in line with Australian Dairy Corporation (ADC) figures. The increase was driven by a five percent increase in cow numbers and a slight increase in yield per cow. Anecdotal evidence suggests that average butterfat content could have increased significantly as producers increased the use of grain rations under worsening drought conditions. This level of milk production surpasses the previous record of 11,172 TMT produced prior to industry deregulation in 1999/2000.

Milk production for 2002/03 is forecast to increase one percent to 11,723 TMT, surpassing the previous year's record level of production. This production increase falls below ABARE's forecast increase of two percent. Post's production forecast takes into account worsening drought conditions, shortages of irrigation water and tight fodder supplies at time of writing this report. Post has forecast a three percent increase in cow numbers in line with ABARE, but has milk yield falling slightly.

ABARE's forecast for 2002/03 is for production increases in all major product categories including a five percent increase for cheese, seven percent for butter, five percent for WMP and a nine percent for SMP. These rises would not seem to fit with ABARE's forecast milk production increase of only two percent. Industry sources believe however, that this apparent discrepancy could occur given higher average fat levels in milk and perhaps lower average fat levels in manufactured products. Post expects the degree to which this could occur as unlikely and, thus, the production forecasts for cheese and SMP, the two largest users of manufacturing milk, have been trimmed somewhat. Market milk production and consumption remain relatively flat.

### **Productive Factors**

While the total number of dairy farmers in Australia has been falling for some time, the total dairy herd has been increasing steadily since 1989/90. Post anticipates this trend to continue, while seasonal conditions allow.

Over the longer term, milk production per cow has been increasing through genetic improvement, pasture improvement, increased grain feeding and improved livestock management.

<b>Year</b>	<b>Yield (l/cow)</b>
1998/99	4723
1999/00	4996
2000/2001	4623
2001/02 (e)	4693
2002/03 (f)	4646

Source: ABARE

Australia still has a predominantly pasture-based production system, but supplemental feeding is increasingly practiced throughout the country. ABARE surveys indicate that the average quantities of both concentrates and grain purchased by dairy farmers doubled between 1990/91 and 1999/2000.

### **Consumption**

The domestic market for dairy products is mature with little room for significant growth. Expectations are that overall consumption of dairy products will only increase about one percent per year in the immediate future.

**Trade**

Import Trade Matrix			
Country	Australia		
Commodity	Dairy, Milk, Fluid		
Time period	Jan-Dec	Units:	
Imports for:	2000		2001
U.S.	0	U.S.	0
Others		Others	
New Zealand	3474	New Zealand	3073
Total for Others	3474		3073
Others not Listed	197		64
Grand Total	3671		3137

Export Trade Matrix			
Country	Australia		
Commodity	Dairy, Milk, Fluid		
Time period	Jan-Dec	Units:	MT
Exports for:	2000		2001
U.S.	0	U.S.	11
Others		Others	
Singapore	23560	Hong Kong	21364
Hong Kong	23298	Singapore	19901
Philippines	9549	Philippines	11339
China	4808	Samoa (Am)	3814
Malaysia	3965	China	2903
Samoa (Am)	3253	PNG	2850
PNG	2875	Vietnam	2670
Vietnam	2554	Malaysia	2347
Indonesia	2318	Mauritius	1834
Mauritius	1745	Indonesia	1754
Total for Others	77925		70776
Others not Listed	6392		5669
Grand Total	84317		76456

According to official ABS statistics, Hong Kong, Singapore and the Philippines accounted for more than two-thirds of fluid milk exports in CY2001. Fluid milk exports decreased nine percent in CY 2001, to 76,456 MT, following a 14 percent increase the previous year. In recent years, increasing volumes of milk and short shelf-life products have been exported to the growing retail markets in Asia. Almost 70 percent of milk exports are UHT.

## Policy

The Australian dairy market was largely deregulated on July 1, 2000. Prior to deregulation, Australia's domestic market (drinking) milk was regulated by state arrangements and manufacturing milk was supported by the Domestic Market Support Fund (See AS0017, AS9052 for further details). In recognition of the fact that deregulation could have major impacts on producers and communities, the Commonwealth responded with a \$A1.78 billion restructuring package. Of this amount, \$A1.63 billion was allocated to the Dairy Structural Adjustment Program (DSAP) administered by the newly created Dairy Adjustment Authority (DAA). Also included in the package was a \$A30 million Dairy Exit Program (DEP) and a \$A45 million Dairy Regional Assistance Package (DRAP).

In 1999/2000, Australia's 12,888 dairy farmers were required to undertake a Farm Business Assessment and to have a qualified financial advisor sign the declaration that accompanied the application form. Individual producer entitlements are based on 1998-99 milk deliveries at the rate of 46.23 cents a liter for market milk and 8.96 cents a liter for manufacturing milk. Payments would be paid quarterly over eight years. Exit payments of up to \$45,000 were available for farmers who chose to leave the industry. The program is financed by a Commonwealth levy of 11 cents per liter on retail sales of drinking milk.

Since deregulation, incomes for dairy farmers in previously regulated states have fallen dramatically. The Australian Competition and Consumer Commission granted an interim ruling for dairy farmers to negotiate collectively with processors regarding the supply of raw milk. According to media reports, the first collectively bargained agreement was reached in Queensland, where farmers negotiated price, supply, quality and freight arrangements for CY 2002. Media reports put the negotiated supply price at 34.4 cents per liter, 10 percent above the price achieved the previous year. This interim ruling is due to expire on July 1, 2005.

## Prices

Returns to dairy farmers (Aust. cents/liter) for market and manufacturing milk and retail prices for market milk (Aust. cents/liter) are presented in the following table.



Year	Price			
	Manufacturing	Market	Average	Retail
1995/96	26.0	50.4	31.1	113
1996/97	24.0	51.0	29.6	115
1997/98	23.9	52.0	29.4	116
1998/99	23.0	52.0	28.9	122
1999/00	22.0	52.3	26.3	135
2000/01	n/a	n/a	28.2	135
2001/02 (f)	n/a	n/a	24.3	135

Source: ABARE/Australian Bureau of Statistics (retail price is for the June quarter of given year for Sydney, i.e., June 99 for 98/99 year)

Current exchange rate US\$ 1.00= A\$ 1.80

According to government sources, ABARE and the ABS no longer deem it necessary to publish both manufacturing and market farm gate milk prices. This is due to deregulation creating one new price for both market and manufacturing milk. Post believes that there will continue to be some premium for the delivery of market milk. However, the prices received for both are now closely related.

## Cheese

### Production

PSD Table						
Country	Australia					
Commodity	Dairy, Cheese				(1000 MT)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Beginning Stocks	65	65	62	62	88	105
Production	374	374	411	424	0	424
Intra EC Imports	0	0	0	0	0	0
Other Imports	43	43	40	45	0	43
TOTAL Imports	43	43	40	45	0	43
TOTAL SUPPLY	482	482	513	531	88	572
Intra EC Exports	0	0	0	0	0	0
Other Exports	215	215	210	201	0	220
TOTAL Exports	215	215	210	201	0	220
Human Dom. Consumption	205	205	215	225	0	235
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	205	205	215	225	0	235
TOTAL Use	420	420	425	426	0	455
Ending Stocks	62	62	88	105	0	117
TOTAL DISTRIBUTION	482	482	513	531	0	572
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	10	10	10	11	0	11

Total cheese production in 2001/02 is estimated by post at 424 TMT, up 13 percent from the 374 TMT reported by ADC for 2000/01. ADC figures for the period July 2001 to March 2002 show a 17.6 percent increase in cheese production. However, with the onset of drought conditions, post has discounted this increase for the final quarter, estimating a 13 percent total increase for the 2001/02 year.

Cheese production is forecast to remain flat in 2002/03 at 424 TMT, despite ABARE's forecast five percent increase. Higher stock levels, lower export prices and a smaller than expected increase in milk production are expected to constrain any increase in cheese production for 2002/03.

**Trade**

Import Trade Matrix			
Country	Australia		
Commodity	Dairy, Cheese		
Time period	Jan-Dec	Units:	MT
Imports for:	2000		2001
U.S.	51	U.S.	51
Others		Others	
New Zealand	28756	New Zealand	37023
Italy	1823	Italy	1702
Denmark	1547	Denmark	1420
Greece	1196	Norway	1235
Norway	1191	Greece	1012
Netherlands	991	Netherlands	927
France	780	Bulgaria	819
Bulgaria	716	France	771
Germany	561	Germany	509
United Kingdom	387	United Kingdom	130
Total for Others	37948		45548
Others not Listed	830		1034
Grand Total	38829		46633

Export Trade Matrix			
Country	Australia		
Commodity	Dairy, Cheese		
Time period	Jan-Dec	Units:	
Exports for:	2000		2001
U.S.	7907	U.S.	8891
Others		Others	
Japan	90335	Japan	89124
Netherlands	26361	Netherlands	16194
Saudi Arabia	16180	Saudi Arabia	15669
Korea, Rep	15996	Korea, Rep	14510
United Kingdom	8676	United Kingdom	7264
Philippines	5290	Philippines	5224
Algeria	4539	Mexico	4327
Indonesia	3934	Indonesia	3994
Trinidad & Tobago	3324	Algeria	3059
France	3216	Taiwan	3054
Total for Others	177851		162419
Others not Listed	46796		35880
Grand Total	232554		207190

Australian cheese exports decreased 11 percent in CY 2001 from the level reached in 2000. Asia remains the most important market, taking 56 percent of total exports, with Japan by far the largest market. Japan imported 89,124 TMT of Australian cheese, or 43 percent of all exports in 2001. Exports to the United States increased 12 percent to 8,891 MT, driven by a favorable exchange rate and increased production.

Post forecasts cheese exports to increase 10 percent to 220 TMT in 2002/03. This is contrary to ABARE's forecast of a one percent fall in exports. Post advises that much of the increase in milk production experienced in 2001/02 was processed into cheese resulting in much higher ending stocks. Post anticipates a large proportion of stored cheese will become available for sale in 2002/03 and, with domestic consumption likely to remain flat, exports are expected to increase significantly in 2002/03 and beyond.

## Butter

### Production

PSD Table						
Country	Australia					
Commodity	Dairy, Butter				(1000 MT)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Beginning Stocks	14	14	12	7	19	7
Production	164	160	164	166	0	179
Intra EC Imports	0	0	0	0	0	0
Other Imports	12	12	13	7	0	10
TOTAL Imports	12	12	13	7	0	10
TOTAL SUPPLY	190	186	189	180	19	196
Intra EC Exports	0	0	0	0	0	0
Other Exports	121	122	114	114	0	130
TOTAL Exports	121	122	114	114	0	130
Domestic Consumption	57	57	56	59	0	59
TOTAL Use	178	179	170	173	0	189
Ending Stocks	12	7	19	7	0	7
TOTAL DISTRIBUTION	190	186	189	180	0	196
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	2	2	6	6	0	6

Butter production is estimated to have increased four percent in 2001/02 to 166 TMT. Butter production is forecast to rise seven percent to 179 TMT in 2002/03, in line with ABARE's forecast.

## Trade

Import Trade Matrix			
Country	Australia		
Commodity	Dairy, Butter		
Time period	Jan-Dec	Units:	MT
Imports for:	2000		2001
U.S.	54	U.S.	56
Others		Others	
New Zealand	10562	New Zealand	9875
France	12	France	13
United Kingdom	1	Denmark	4
		Malaysia	4
		Lebanon	1
Total for Others	10575		9897
Others not Listed	59		40
Grand Total	10688		9993

Export Trade Matrix			
Country	Australia		
Commodity	Dairy, Butter		
Time period	Jan-Dec	Units:	MT
Exports for:	2000		2001
U.S.	1575	U.S.	5573
Others		Others	
Egypt	16700	Egypt	9007
Thailand	8689	Thailand	7767
Singapore	6851	Singapore	6252
Malaysia	5156	Russia	5442
Philippines	4908	Malaysia	5370
Korea, Rep	4900	Mexico	5107
Russia	4744	Saudi Arabia	4981
Netherlands	4702	Taiwan	4508
Saudi Arabia	4605	Korea, Rep	4343
U.A.E.	4195	U.A.E.	4018
Total for Others	65450		56795
Others not Listed	47636		35143
Grand Total	114661		97511

Australian butter exports decreased 15 percent in CY 2001, driven by a 46 percent decrease in exports to Egypt, following a similar increase the previous year. Exports to Thailand, Singapore and Malaysia also fell significantly.

Exports are forecast to increase 14 percent to 130 TMT in 2002/03, in line with ABARE's forecast.

## Milk Nonfat Dry Milk Powder

### Production

PSD Table						
Country	Australia					
Commodity	Dairy, Milk, Nonfat Dry				(1000 MT)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Beginning Stocks	2	2	12	11	33	39
Production	265	265	252	273	0	286
Intra EC Imports	0	0	0	0	0	0
Other Imports	2	2	4	2	0	2
TOTAL Imports	2	2	4	2	0	2
TOTAL SUPPLY	269	269	268	286	33	327
Intra EC Exports	0	0	0	0	0	0
Other Exports	224	225	201	212	0	233
TOTAL Exports	224	225	201	212	0	233
Human Dom. Consumption	33	33	34	35	0	36
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	33	33	34	35	0	36
TOTAL Use	257	258	235	247	0	269
Ending Stocks	12	11	33	39	0	58
TOTAL DISTRIBUTION	269	269	268	286	0	327
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	1	1	0	1	0	1

Skim Milk Powder (SMP) production for 2001/02 is estimated at 273 TMT, three percent higher than the previous year and in line with ADC figures for the period July 2001 to March 2002.

SMP production for 2002/03 is forecast to increase five percent to 286 TMT. This forecast is lower than the nine percent increase forecast by ABARE, which post considers too high given the modest increase in whole milk production for 2002/03.

Victoria is the largest producer of skim milk powder, accounting for over 90 percent of total production. The major uses of SMP are confectionery, ice cream and baking products. Smaller amounts are used in yogurt manufacture. The underlying consumer trend toward reduced consumption of products that contain animal fats has been somewhat addressed by the development of many low-fat dairy products.



**Trade**

Import Trade Matrix			
Country	Australia		
Commodity	Dairy, Milk, Nonfat Dry		
Time period	Jan-Dec	Units:	MT
Imports for:	2000		2001
U.S.	5	U.S.	0
Others		Others	
New Zealand	2860	New Zealand	1599
Netherlands	33	Netherlands	26
Korea, Rep	10	Korea, Rep	3
Austria	2		
Malaysia	1		
Total for Others	2906		1628
Others not Listed	0		108
Grand Total	2911		1736

Export Trade Matrix			
Country	Australia		
Commodity	Dairy, Milk, Nonfat Dry		
Time period	Jan-Dec	Units:	MT
Exports for:	2000		2001
U.S.	1671	U.S.	7
Others		Others	
Philippines	53542	Philippines	39591
Malaysia	33500	Japan	22968
Japan	28249	Malaysia	19806
Thailand	18783	Thailand	17356
Singapore	12791	Singapore	15349
Indonesia	10647	Indonesia	10847
Taiwan	9966	Saudi Arabia	10221
Mexico	7378	Taiwan	10025
Saudi Arabia	6882	China	5433
China	4879	Sri Lanka	5368
Total for Others	186617		156964
Others not Listed	30940		23569
Grand Total	219228		180540



SMP exports fell significantly to 180,540 in CY 2001, in line with lower production in 1999/2000 and 2000/01. Asian markets take the bulk of exports, with the Philippines, Malaysia, Thailand and Japan accounting for over two thirds of all exports. Exports to these countries fell significantly in CY 2001, with the exception of Thailand, which fell only slightly.

Exports of SMP to the United States fell dramatically in CY 2001. Industry sources and media reports suggest surplus production and ballooning U.S. stocks are responsible for this fall.

Exports of SMP are forecast to increase ten percent in 2002/03, to 233 TMT. This forecast is in line with ABARE and driven by higher forecast production and increasing stock levels.

## Dry Whole Milk Powder

### Production

PSD Table						
Country	Australia					
Commodity	Dairy, Dry Whole Milk Powder				(1000 MT)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Beginning Stocks	6	6	10	10	41	27
Production	205	205	205	207	0	213
Intra EC Imports	0	0	0	0	0	0
Other Imports	7	7	7	4	0	6
TOTAL Imports	7	7	7	4	0	6
TOTAL SUPPLY	218	218	222	221	41	246
Intra EC Exports	0	0	0	0	0	0
Other Exports	183	183	154	168	0	188
TOTAL Exports	183	183	154	168	0	188
Human Dom. Consumption	25	25	27	26	0	26
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	25	25	27	26	0	26
TOTAL Use	208	208	181	194	0	214
Ending Stocks	10	10	41	27	0	32
TOTAL DISTRIBUTION	218	218	222	221	0	246
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Whole milk powder (WMP) production is estimated to have risen only one percent to 207 TMT in 2001/02 and is forecast to increase three percent in 2002/03.

**Trade**

Import Trade Matrix			
Country	Australia		
Commodity	Dairy, Dry Whole Milk Powder		
Time period	Jan-Dec	Units:	MT
Imports for:	2000		2001
U.S.	15	U.S.	4
Others		Others	
New Zealand	4423	New Zealand	6159
Singapore	114	Finland	144
Finland	54	France	10
United Kingdom	33		
Netherlands	32		
France	24		
Taiwan	1		
Total for Others	4681		6313
Others not Listed	25		177
Grand Total	4721		6494

Export Trade Matrix			
Country	Australia		
Commodity	Dairy, Dry Whole Milk Powder		
Time period	Jan-Dec	Units:	MT
Exports for:	2000		2001
U.S.	527	U.S.	219
Others		Others	
Philippines	27517	Taiwan	14318
Sri Lanka	17266	Sri Lanka	12958
Taiwan	16218	Philippines	12575
Bangladesh	13446	Bangladesh	11999
Thailand	10182	Singapore	10717
Vietnam	8442	Malaysia	8868
Oman	8428	Mauritius	6275
Malaysia	8328	Vietnam	6239
Singapore	7257	Indonesia	5939
Canada	6397	China	5676
Total for Others	123481		95564
Others not Listed	43120		48787
Grand Total	167128		144570

WMP exports in CY 2001 were down 13 percent from the record levels of CY 2000. This reduction in exports is in line with lower production for 2000/01 and higher prices which encouraged the liquidation in stocks.

Exports of WMP in 2002/03 are forecast to increase 11.5 percent to 188 TMT. This is driven by higher stocks and slightly higher production.