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Planting Seeds

Planting Seed Annual

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Report Highlights:

Demand for planting seeds in Argentina could be weaker in 1999 due to a potential reduction in planted area for grains and oilseeds.

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Executive Summary	1
Production	1
Table 1. Planted Area Comparison	2
Table 2. Supply and Distribution	2
Government Regulation	3
Seed Certification	3
Genetically Modified Organisms	3
UPOV	3
Prices	4
Table 4. Comparison of retail seed prices, March 1999 with comparable period for 1998	4
Argentine Seed Imports	4
Table 5. Rye Planting Seed Imports	5
Table 6. Barley Planting Seed Imports	5
Table 7. Oat Planting Seed Imports	6
Table 8. Corn Planting Seed Imports	7
Table 9. Sorghum Planting Seed Imports	8
Table 10. Peanut Planting Seed Imports	8
Table 11. Flaxseed Planting Seed Imports	8
Table 12. Rapeseed Planting Seed Imports	9
Table 13. Sunflowerseed Planting Seed Imports	10
Table 14. Cottonseed Planting Seed Imports	11
Table 15. Alfalfa Planting Seed Imports	11
Table 16. Clover Planting Seed Imports	12
Table 17. Fescue Planting Seed Imports	13
Table 18. Bluegrass Planting Seed Imports	14
Table 19. Italian Grass Planting Seed Imports	14
Table 20. Timothy Planting Seed Imports	15
Table 21. Vegetable Planting Seed Imports	15
Argentine Seed Exports	16
Table 22. Corn Planting Seed Exports	17
Table 23. Sorghum Planting Seed Exports	18
Table 24. Peanut Planting Seed Exports	18
Table 25. Rapeseed Planting Seed Exports	19
Table 26. Sunflowerseed Planting Seed Exports	20
Table 27. Cotton Planting Seed Exports	21
Table 28. Alfalfa Planting Seed Exports	21
Table 29. Clover Planting Seed Exports	22
Table 30. Fescue Planting Seed Exports	22
Table 31. Italian Planting Grass Seed Exports	23

Executive Summary

Argentine demand for pasture seeds during the current fall seeding season is very weak. Beef cattle and dairy returns are relatively poor, weather has been unfavorable in some areas, and the farm sector in general in Argentina is facing a difficult financial situation. Many seed companies have a high stock of seeds from last year, as demand was poor last year as well.

Demand for seeds for field crops was somewhat reduced during the past growing season because of reduced planting area resulting from low international commodity prices and unfavorable weather. The low prices are expected to continue over the next year meaning continued lower total area seeded to field crops. Wheat area is expected to rise, but area for most other major crops is projected to fall.

Argentine seed imports were down sharply in 1998, and, given the poor demand situation, are expected to continue weak during 1999. Argentine seed exports, on the other hand, rose sharply in 1998, particularly to the United States, as seed companies take advantage of the counter-season in Argentina to more quickly develop new varieties for seeding in the United States.

Production

Marketing of pasture seeds in Argentina begins in February, peaks in March, declines somewhat in April, and ends in May. Most of the pastures are planted during the fall (March, April, May). Some pastures can be sown jointly with wheat in June, accounting for about percent of total forage seed demand. Another 10 percent of the annual total is seeded in the spring and 80 percent during the fall.

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Area planted to all field crops in Argentina in 1998/99 reached 21,330,000 hectares, down nearly 4 percent from the previous year due to adverse climatic conditions and low international prices. The only exceptions were sunflowerseed and soybeans, for which area planted increased by 14 and 5 percent, respectively, from the previous season. This was because returns for sunflowerseed in 1998 were higher than for other grains, and soybeans were more attractive than corn and sorghum. Moreover, the sunflowerseed oil industries have a greater demand for their products. Demand for seeds for field crops is expected to decline again in 1999/00 due to an expected continuation of depressed international grain prices. Oilseed area is expected to decline and corn seeding may be even or down slightly. Wheat area should rise but not enough to offset the declines in the other major field crops.

Table 1. Planted Area Comparison

	Planted area 1998/99	Planted area 1997/98
Wheat	4,800,000	5,919,000
Corn	3,200,000	3,750,000
Soybeans	7,600,000	7,200,000
Sunflowerseed	4,000,000	3,500,000
Sorghum	875,000	930,000
Barley	225,000	324,000
Peanuts	350,000	407,000
Rice	280,000	247,000

The increase in land dedicated to non-agricultural uses at the expense of agriculture is noticeable. Moreover, there is a loss annually of agricultural land due to erosion and contamination.

Table 2. Supply and Distribution

Type	Area Planted (ha)	Required Seed Tons	Residual Seed %	Certified Seed Tons	% Using Cert. Seed
Corn	3,252,000	58,600	5	85,400	100
Sunflowerseed	3,983,000	19,900	2	23,000	100
Grain Sorghum	907,000	7,500	5	8,600	100
Forage Sorghum	450,000	5,000	20	12,500	100
Soybeans	7,574,000	680,000	30	276,000	57.9
Cottonseed	786,000	27,500	15	24,100	100
Wheat	4,820,000	490,000	25	121,300	33
Barley	215,000	25,800	258	34,900	100
Forages	1,400,000	25,200	8	16,160	68.9

Government Regulation

The National Seed Institute (INASE) seeks to promote the production and marketing of seeds of graded and certified quality. It creates new mechanisms for certification to speed up the system to grant title of ownership for newly developed crop species, ensuring the identification and quality of marketed seeds both locally and in foreign markets. INASE ensures Argentina's presence and involvement in foreign special events in the field.

Seed Certification

INASE services also include providing national certification of the varietal identity of vegetable products; providing international certification of the variety identity of seeds according to the standard of the Organization of Economic Cooperation and Development (OECD); controlling trade in seeds, issuing title for new plant species, maintaining national register of crop plant variety ownership (El Registro Nacional de la Propiedad de Cultivos) and controlling physicobotanical, physiological, sanitary, and genetic quality of seeds in both domestic and foreign markets.

Seed imports generally require a sanitary certificate. The Law requires that all shipments of plants, bulks, cutting, roots, and tubers for propagation be accompanied by a sanitary certificate issued by a competent authority in the exporting country. However, the import of small quantities such as of vegetable seed weighing less than 500 GM (1 lb.) and of forage seed weighing less than 200 GM (7 oz) sent by mail or carried into Argentina in a passenger's baggage, of plants in transit, and of samples without value do not require a sanitary certificate. They will be inspected upon arrival.

Genetically Modified Organisms

Argentina has been a leader in the adaption of Genetically Modified Organisms (GMOs) for row crops, especially in oilseeds, where nearly 70 percent of area was planted to Roundup Ready beans in the most recent year. In contrast, although Argentina's land and climate are well suited for corn production, there has not yet been much seeding of GMO varieties for that crop, with only about 20,000 hectares of Bt corn planted this year. Analysts expect nearly 10 percent coverage in 1999/2000 as planting seed availability increases. Other corn events are being evaluated, Roundup Ready corn in particular, and could be released in the next year if government approval (which is based on scientific studies and market impact factors) is granted. Argentine farmers have readily accepted GMOs in their farming systems, and it follows that the corn sector will employ these hybrids quickly when they are finally released.

UPOV

Argentina is a member of the International Union for the Protection of New Varieties of Seeds and (UPOV) therefore conforms with the 1998 convention. However, in the area of granting patents Argentina is not competent. The organization in charge of granting the licences is the National Institute of Industrial Property (INPI).

Prices

Table 4. Comparison of retail seed prices, March 1999 with comparable period for 1998

Forage Seed	1999	1998
Agropiro Alargado	1.05	2.20
Alfalfa Valley imp. from US	5.90	5.90
Alfalfa Mede imp. from US	5.80	5.90
Oats selected and certified	0.20	0.20
Festuca certified	1.85	2.40
Lotus corniculatus imported	2.10	4.00
Phalaris imported certified	4.60	5.00
Rye grass annual imported	1.50	1.00
Red clover imported	2.85	3.70
Pampeana, local production	3.40	3.50

Data in US\$ per kilogram

Field Crop Seeds	1999	1998
Hybrid sunflower	4	5.36
Flaxseed, certified	0.39	0.39
Hybrid corn	4.33	3.18
Soybean, certified	0.37	0.44
Sorghum, hybrid	2.92	2.03
Wheat, certified	0.20	0.23
Colza/Canola	2.43	2.43

Data in US\$ per kilogram

Argentine Seed Imports

According to official sources during 1998, seed imports decreased by nearly 29 percent compared to the previous season. Corn seed imports dropped by 72 percent, causing much of the total decline. To a lesser extent, total imports of vegetable seeds were also reduced by 30 percent.

A significant increase (178 percent) of sunflowerseed imports from Chile and Bolivia were recorded during 1998, composed primarily by production contracted by companies located in Argentina. Alfalfa seed and other forage seed imports represented nearly 53 percent of the total import value, showing a small increase versus a year earlier.

Table 5. Rye Planting Seed Imports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Canada	2	2,145	0	0
TOTAL	2	2,145	0	0

Data in Metric Tons and US\$. Data may not add due to rounding.

Table 6. Barley Planting Seed Imports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Germany	0	0	37	24,796
United States	17	15,851	16	13,001
Others	1	2,940	1	2
TOTAL	18	18,791	54	37,799

Data in Metric Tons and US\$. Data may not add due to rounding

Table 7. Oat Planting Seed Imports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Brazil	100	32,582	0	0
Canada	2	2,006	0	0
Chile	10	1,006	346	101,418
Paraguay	290	78,317	178	50,413
Uruguay	8	8,698	0	0
TOTAL	410	122,669	524	151,831

Data in Metric Tons and US\$. Data may not add due to rounding

Table 8. Corn Planting Seed Imports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Belgium	8	52,786	0	0
Bolivia	59	14,652	0	0
Brazil	3,720	6,675,023	538	711,480
Chile	443	879,189	969	1,492,417
France	2	33,710	44	75,561
Germany	8	68,978	21	27,008
Italy	64	176,075	52	77,520
Mexico	9	25,399	17	25,436
Puerto Rico	48	467,419	13	179,220
South Africa	1,130	1,350,054	45	270,099
Spain	1	2,955	1	4,246
Taiwan	1	312	0	0
U.S. Territories	100	502,261	95	436,191
United States	20,483	35,919	6,850	13,237,006
Uruguay	6	103,061	0	0
Zambia	1	14,944	0	0
Others	less than 1	484	1	6,554
TOTAL	26,131	46,289,150	8,646	16,542,738

Data in Metric Tons and US\$. Data may not add due to rounding

Table 9. Sorghum Planting Seed Imports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Australia	339	374,408	1,897	2,094,776
Bolivia	0	0	35	22,296
United States	2,714	2,850,812	933	1,235,478
Uruguay	0	0	72	74,236
Others	less than 1	798	2	2,411
TOTAL	3,054	3,226,018	2,939	3,429,197

Data in Metric Tons and US\$. Data may not add due to rounding

Table 10. Peanut Planting Seed Imports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
United States	147	180,356	15	26,629
TOTAL	147	180,356	15	26,629

Data in Metric Tons and US\$. Data may not add due to rounding

Table 11. Flaxseed Planting Seed Imports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Belgium	13	5,725	0	0
United States	20	17,046	-	1
TOTAL	33	22,851	0	1

Data in Metric Tons and US\$. Data may not add due to rounding

Table 12. Rapeseed Planting Seed Imports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Germany	7	18,736	0	0
Sweden	3	8,992	19	52,998
United States	38	86,345	0	0
Others	1	12,281	2	30,680
TOTAL	49	129,670	21	83,678

Data in Metric Tons and US\$. Data may not add due to rounding

Table 13. Sunflowerseed Planting Seed Imports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Australia	2	7,297	0	0
Bolivia	372	287,672	270	701,389
Brazil	1	3,359	24	45,536
Chile	1,098	1,603,587	2,357	3,660,249
France	1	13,620	2	42,220
Israel	3	18,008	2	20,580
Italy	1	4,922	2	14,757
Mexico	0	0	6	29,115
Paraguay	35	134,540	6	24,292
South Africa	0	0	270	701,023
Spain	50	244,495	26	203,473
The Netherlands	3	14,041	0	0
U.S. Territories	2	13,533	9	44,947
United States	930	3,567,032	766	2,204,716
Uruguay	0	0	9	28,784
Others	0	0	2	6,154
TOTAL	2,497	5,923,848	5,396	9,063,164

Data in Metric Tons and US\$. Data may not add due to rounding

Table 14. Cottonseed Planting Seed Imports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
United States	52	85,359	115	698,190
TOTAL	52	85,359	115	698,190

Data in Metric Tons and US\$. Data may not add due to rounding

Table 15. Alfalfa Planting Seed Imports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Australia	1,839	6,316,964	1,021	3,797,734
Canada	105	322,073	154	487,678
Chile	119	507,878	-	-
France	229	690,305	148	447,910
Italy	375	873,991	300	833,715
Singapore	0	0	63	243,990
South Africa	141	519,017	63	248,717
The Netherlands	0	0	15	46,419
United States	5,750	21,337,654	7,106	28,080,338
Venezuela	0	0	34	158,768
TOTAL	8,558	30,567,882	8,905	34,345,589

Data in Metric Tons and US\$. Data may not add due to rounding

Table 16. Clover Planting Seed Imports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Australia	11	41	205	502,510
Canada	90	258,300	37	73,351
Chile	477	1,222,072	565	1,426,090
Germany	0	0	66	156,840
Italy	60	159	101	261,887
New Zealand	38	132,288	124	316,769
Others	0	0	37	97
South Africa	2	8,039	3	9,144
The Netherlands	21	51	0	0
United States	372	1,126,704	237	644,134
Uruguay	33	105	32	66,059
TOTAL	1,104	3,103,646	1,406	3,553,416

Data in Metric Tons and US\$. Data may not add due to rounding

Table 17. Fescue Planting Seed Imports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Australia	151	401,099	14	19,600
Canada	10	13,294	10	14,065
Chile	5	12,381	0	0
Denmark	0	0	5	8,003
France	55	147,678	0	0
Germany	15	22,978	12	20,020
Italy	138	285,011	137	212,742
New Zealand	2	6,968	17	37,209
The Netherlands	4	9,696	0	0
United States	822	1,925,927	992	1,643,596
Uruguay	66	187,937	25	58,881
TOTAL	12,673	3,012,969	1,212	2,015,861

Data in Metric Tons and US\$. Data may not add due to rounding

Table 18. Bluegrass Planting Seed Imports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Denmark	0	0	5	8,400
Germany	7	14,423	11	22,819
The Netherlands	2	4,848	0	0
United States	18	38,843	23	41,740
TOTAL	27	58,114	38	72,959

Data in Metric Tons and US\$. Data may not add due to rounding

Table 19. Italian Grass Planting Seed Imports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Australia	16	24,716	7	10,119
Belgium	0	0	12	10,787
Chile	25	27,638	50	55,275
Denmark	0	0	79	115,770
France	2	3,564	0	0
Germany	11	20,204	681	483,679
New Zealand	163	326,116	107	197,288
Singapore	11	16,752	0	0
The Netherlands	2	2,537	1	1,472
United States	758	790,918	804	942,622
Uruguay	1,233	804,286	423	307,935
TOTAL	2,220	2,016,731	2,163	2,125,060

Data in Metric Tons and US\$. Data may not add due to rounding

Table 20. Timothy Planting Seed Imports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
United States	1	1,980	1	747
Others	0	0	2	2,564
TOTAL	1	1,980	3	3,311

Data in Metric Tons and US\$. Data may not add due to rounding

Table 21. Vegetable Planting Seed Imports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Chile	33	819,548	37	855,934
Denmark	8	63,101	20	172,319
France	29	570,460	22	495,560
Germany	75	480,029	24	133,786
Italy	41	314,503	31	233,847
Japan	12	545,116	13	551,089
New Zealand	20	19,897	0	0
South Africa	4	39,178	0	0
Spain	2	48,417	1	72,201
The Netherlands	81	692,581	54	901,200
United States	132	4,108,965	93	3,419,146
Others	19	48	9	458,489
TOTAL	457	8,251,869	303	7,352,012

Data in Metric Tons and US\$. Data may not add due to rounding

Argentine Seed Exports

During 1998 Argentine seed exports continued to rise, up 76 percent in volume versus 1997. Corn seed exports increased 130 percent during this period. The export of new seed cultivares to the United States was the main component as these were produced during counter-season to the United States.

Other individual species which contributed in a significant manner to the increase were soybeans which were up 52 percent (main destination United States), cottonseed up 39 percent (largely to Paraguay), and forage seeds up 47 percent (mostly to Canada and the United States).

Table 22. Corn Planting Seed Exports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Austria	3	780	0	0
Bolivia	148	301,092	248	12,314
Brazil	410	994,771	19	105,696
Chile	107	273	47	204,207
China	13	17,807	60	94,556
France	379	681,575	3	4,709
Germany	6	8,788	279	501,420
Hungary	6	11,932	0	0
Italy	216	611,851	28	49,281
Japan	0	0	61	108,634
Korea	0	0	1	7,385
Mexico	0	0	1	1,500
Paraguay	35	57,784	50	64,757
Peru	111	134,441	74	106,946
Portugal	1	599	13	25,263
Puerto Rico	1	1,920	zero	0
Russia	0	0	400	165,000
South Africa	0	0	6	12,314
Spain	0	0	12	97
The Netherlands	3	18,012	0	0
United States	7,102	11,789,408	27,621	44,159,217
Uruguay	1,870	2,657,109	1,529	2,458,491
Others	0	0	1	1,516
TOTAL	10,411	17,288,142	30,453	48,083,303

Data in Metric Tons and US\$. Data may not add due to rounding

Table 23. Sorghum Planting Seed Exports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Bolivia	410	524,223	543	725,343
Brazil	15	25,698	0	0
France	10	8,132	0	0
Mexico	0	0	14	14
Paraguay	69	89,918	70	91,047
United States	323	391,635	45	145,881
Uruguay	458	567,019	620	560,571
Others	0	0	1	1
TOTAL	827	1,039,606	672	962,285

Data in Metric Tons and US\$. Data may not add due to rounding

Table 24. Peanut Planting Seed Exports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Chile	8	8,100	0	0
The Netherlands	85	66,019	0	0
Total	93	74,119	0	0

Data in Metric Tons and US\$. Data may not add due to rounding

Table 25. Rapeseed Planting Seed Exports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Canada	5	24,476		
Canada	0	0	8	45,475
Germany	1	611	0	0
Japan	3	19,070	1	10,415
United States	1	4,698	0	0
TOTAL	10	48,855	9	55,890

Data in Metric Tons and US\$. Data may not add due to rounding

Table 26. Sunflowerseed Planting Seed Exports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Bolivia	564	1,803,276	473	1,524,406
Brazil	27	87,880	41	131,197
Chile	13	35,223	32	71,450
China	0	0	8	20,970
France	15	38,783	10	35,325
Germany	1	5,030	0	0
Italy	12	44,698	20	74,635
Paraguay	145	549,112	308	1,181,752
South Africa	0	0	5	142,001
Spain	56	166,810	35	129,055
Thailand	4	10,450	9	20,970
The Netherlands	202	72,626	0	0
United States	69	313,372	119	399,352
Uruguay	644	2,238,967	655	2,687,792
Venezuela	0	0	60	270,234
Others	1	11,175	95	832
TOTAL	1,753	5,377,402	1,870	6,689,971

Data in Metric Tons and US\$. Data may not add due to rounding

Table 27. Cotton Planting Seed Exports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Bolivia	120	182,929	80	97,327
Paraguay	4,166	2,521,602	3,187	2,941,012
United States	16	15,500	27	27,100
Uruguay	20	13,622	36	50,400
TOTAL	4,321	2,733,653	3,330	3,115,939

Data in Metric Tons and US\$. Data may not add due to rounding

Table 28. Alfalfa Planting Seed Exports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Bolivia	106	23,056	7	29,741
Brazil	1	5,950	2	11,700
France	1	1,200	1	1,430
Japan	1	5,952	0	0
Morocco	17	60,860		
Others	0	0	1	1,298
Paraguay	2	5,550	0	0
United States	114	382,457	21	74,400
Uruguay	17	79,600	58	294,004
TOTAL	257	564,625	89	420,937

Data in Metric Tons and US\$. Data may not add due to rounding

Table 29. Clover Planting Seed Exports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Brazil	1	3,370	3	9,270
Chile	10	38,900	14	52,718
Uruguay	110	372,833	80	326,058
Total	121	415,103	97	388,046

Data in Metric Tons and US\$. Data may not add due to rounding

Table 30. Fescue Planting Seed Exports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Bolivia	0	0	1	9,270
Brazil	1	5,608	2	6,673
Chile	0	0	26	64,172
United States	0	0	15	18,100
Uruguay	0	0	115	269,594
TOTAL	1	5,608	158	360,601

Data in Metric Tons and US\$. Data may not add due to rounding

Table 31. Italian Planting Grass Seed Exports

Country	CY 1997 Volume	CY 1997 Value	Jan.-Nov. 1998 Volume	Jan.-Nov. 1998 Value
Belgium	16	16,480	0	0
Brazil	1	2,766	0	0
Chile	0	0	10	10,230
The Netherlands	32	30,210	0	0
Uruguay	0	0	25	29,870
Total	49	49,456	35	40,100

Data in Metric Tons and US\$. Data may not add due to rounding