



Evolution of Global Wheat Production

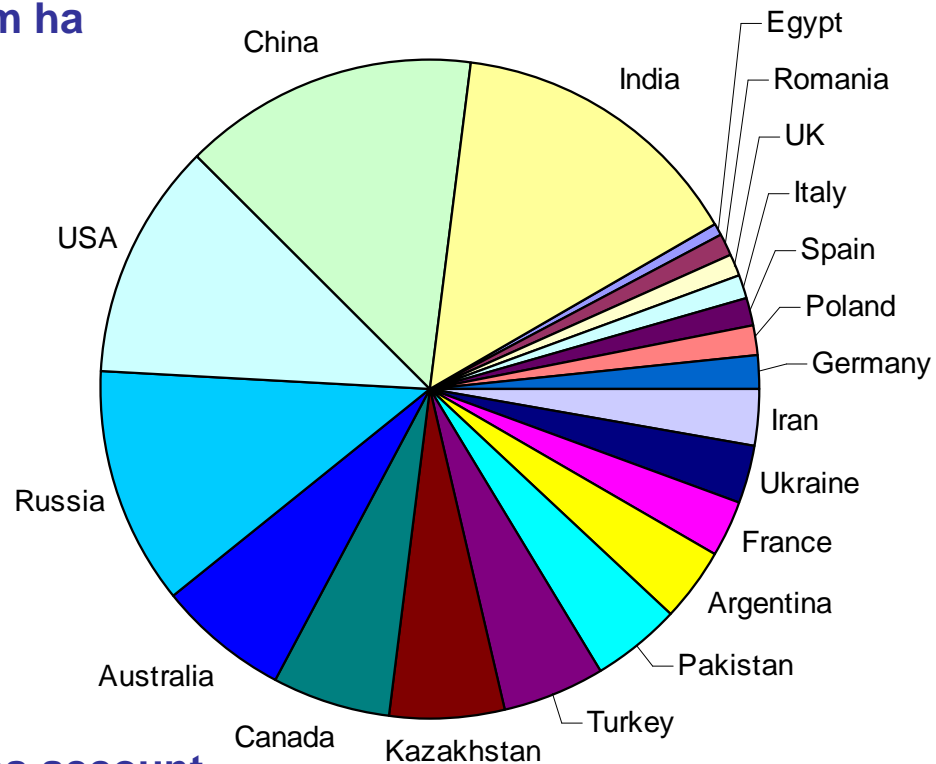
Dr. Yelto Zimmer, Head of *agri benchmark* Cash Crop

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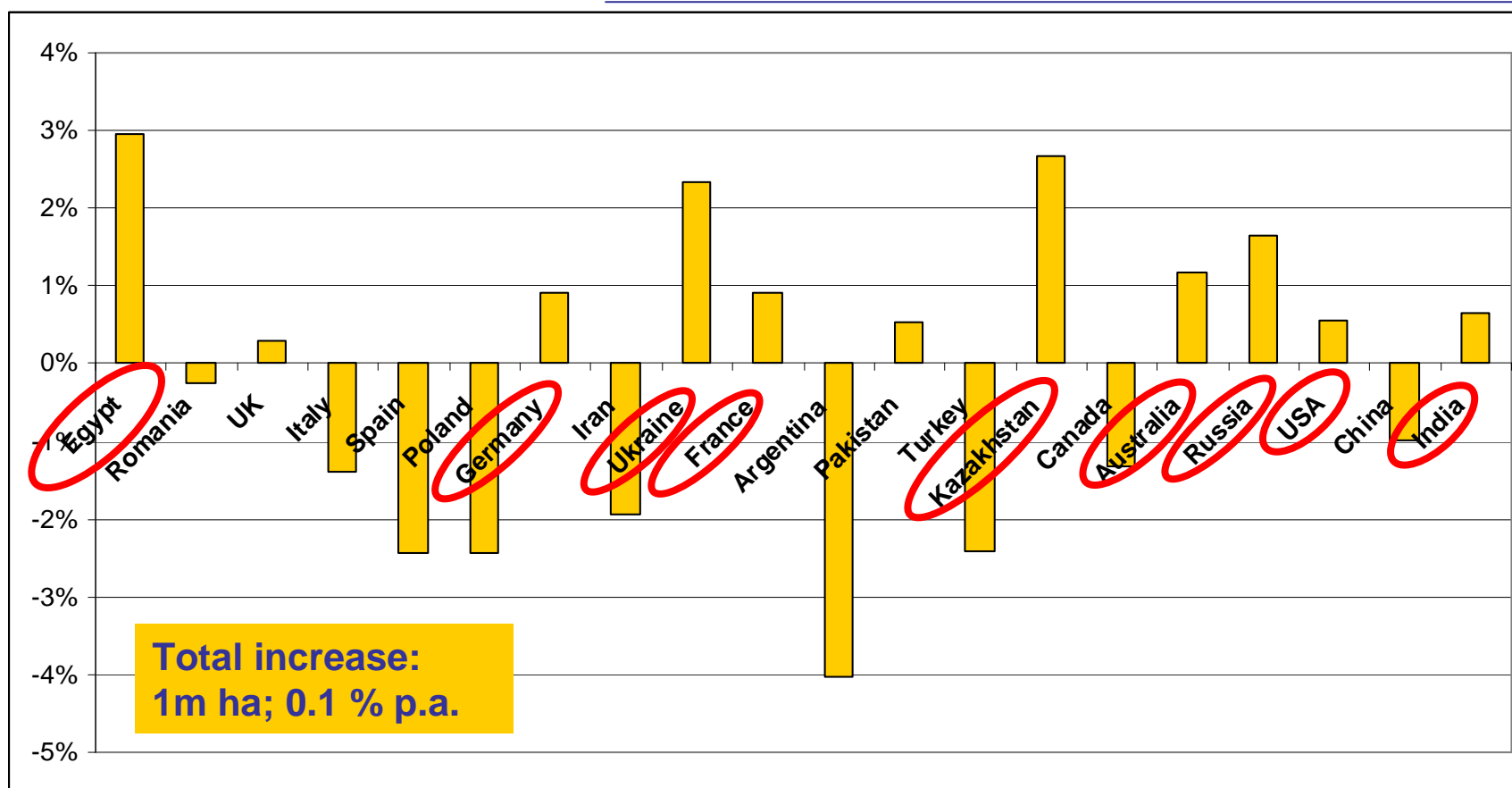
Break down of top 20 Wheat Producers Acreage

**Total wheat acreage in
2000: 185m ha**



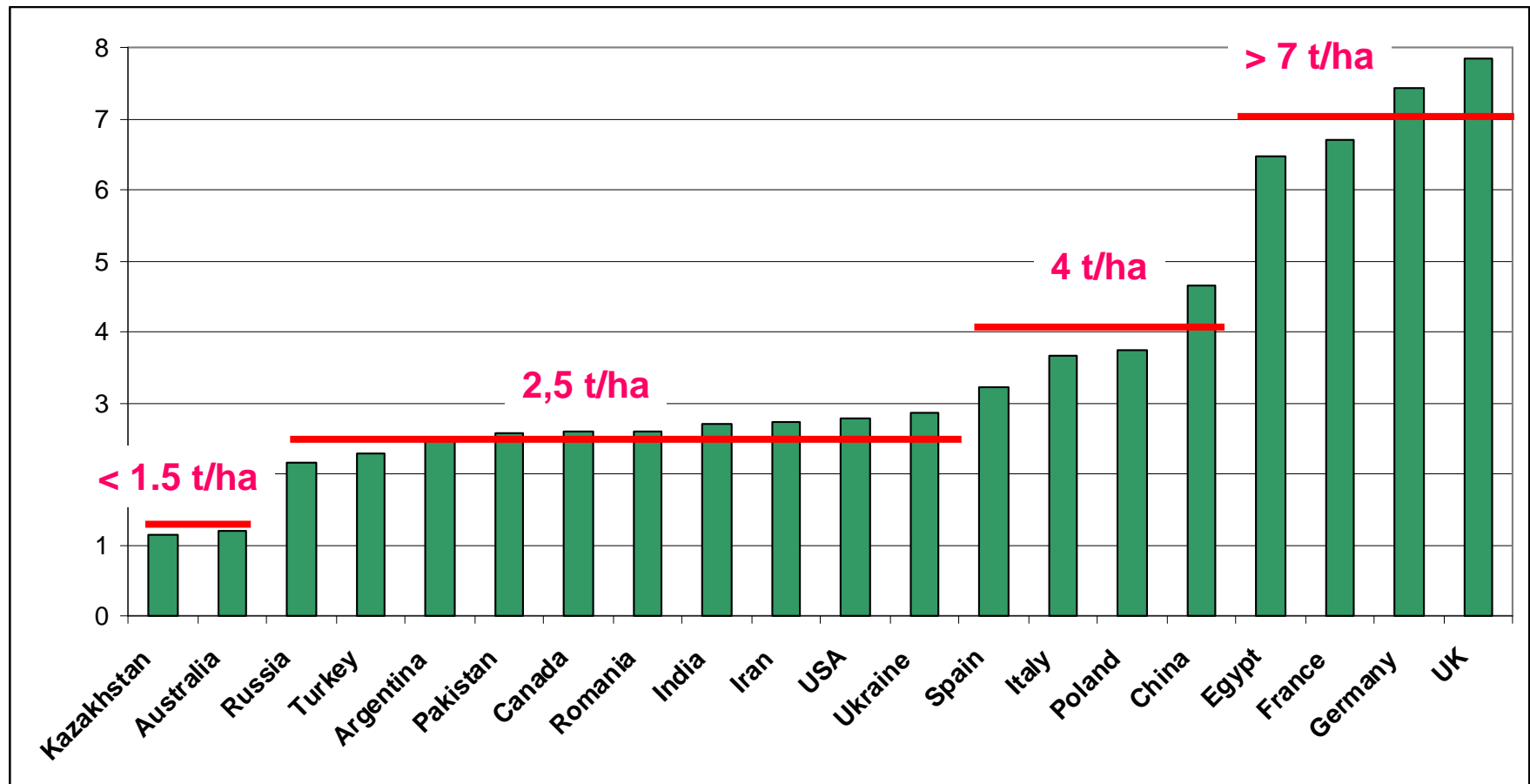
**10 countries account
for 2/3 of total acreage**

Annual Changes in Wheat Acreage (2000 to 2008, in %)

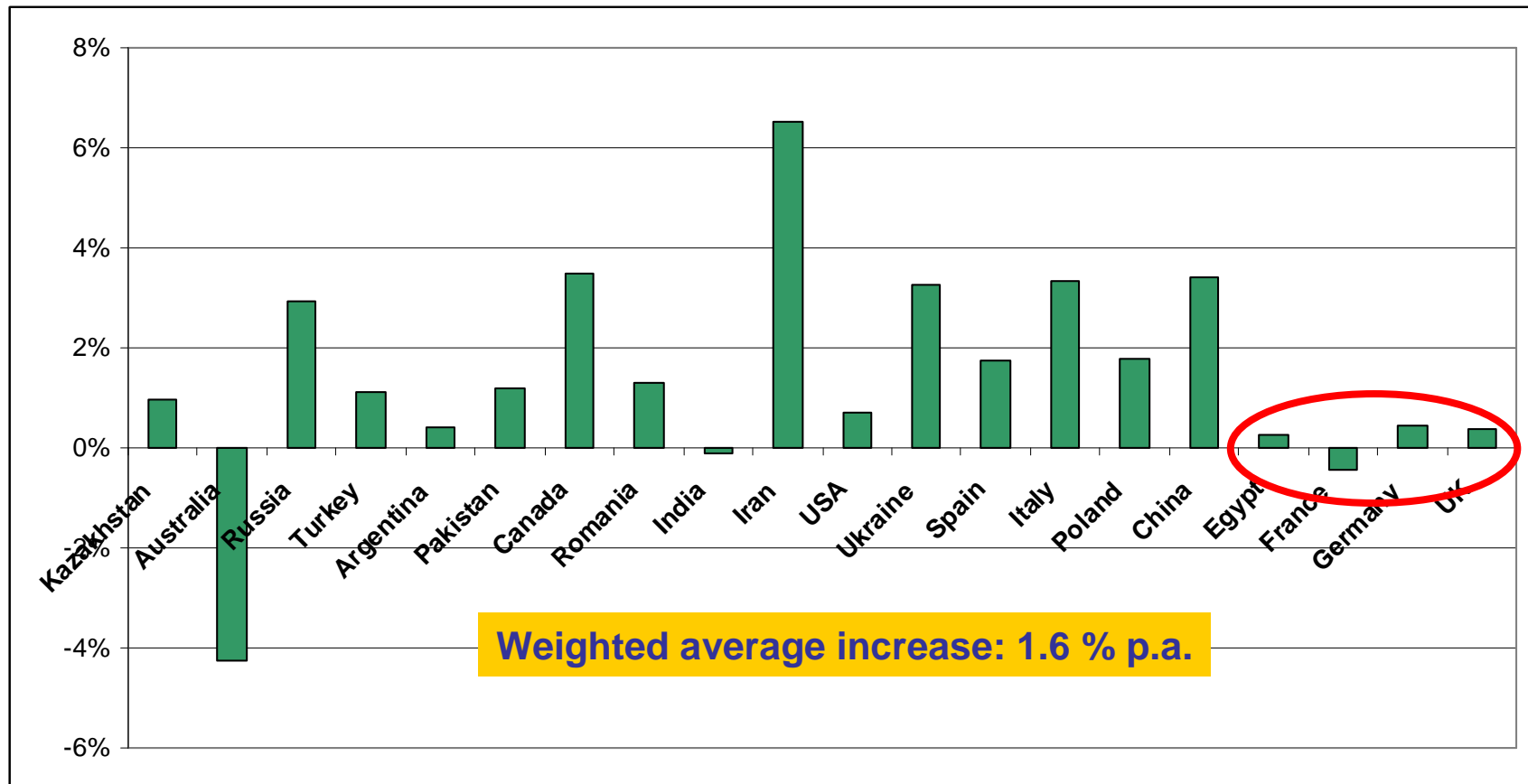


Some big shots increased acreage (IN, UA, KZ, AU, RU, DE, FR)
Some others reduced wheat acreage significantly (AR, CN, CA)

Wheat Yields (t/ha; average 2006 to 2008)



Evolution of Wheat Yields (annual growth rate in %)

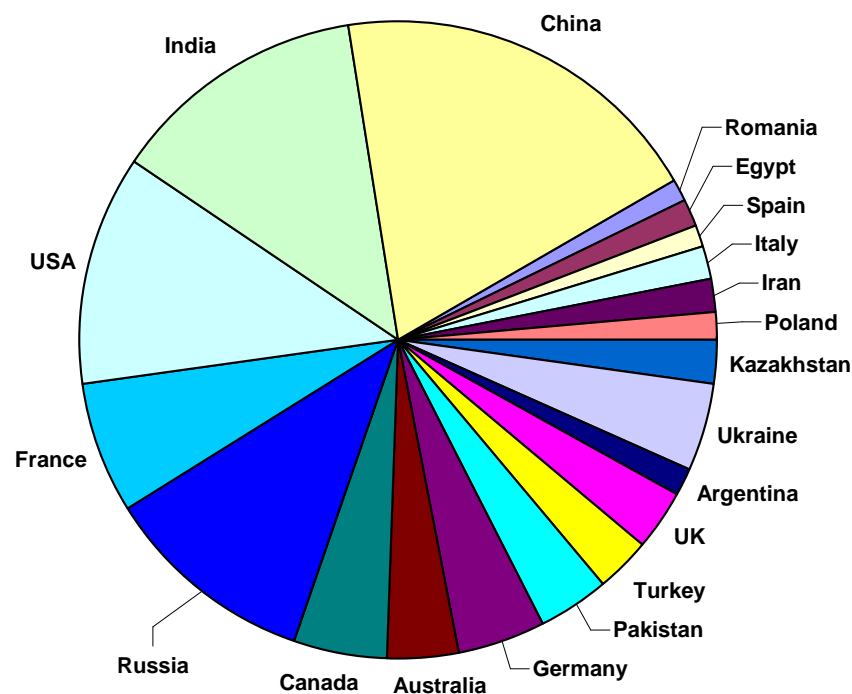


Almost flat yields in high yielding countries (except for CN)

Most other countries with significant growth rates; exceptions: EG, IN, AR, AUS

Break down of top 20 Wheat Production (2008)

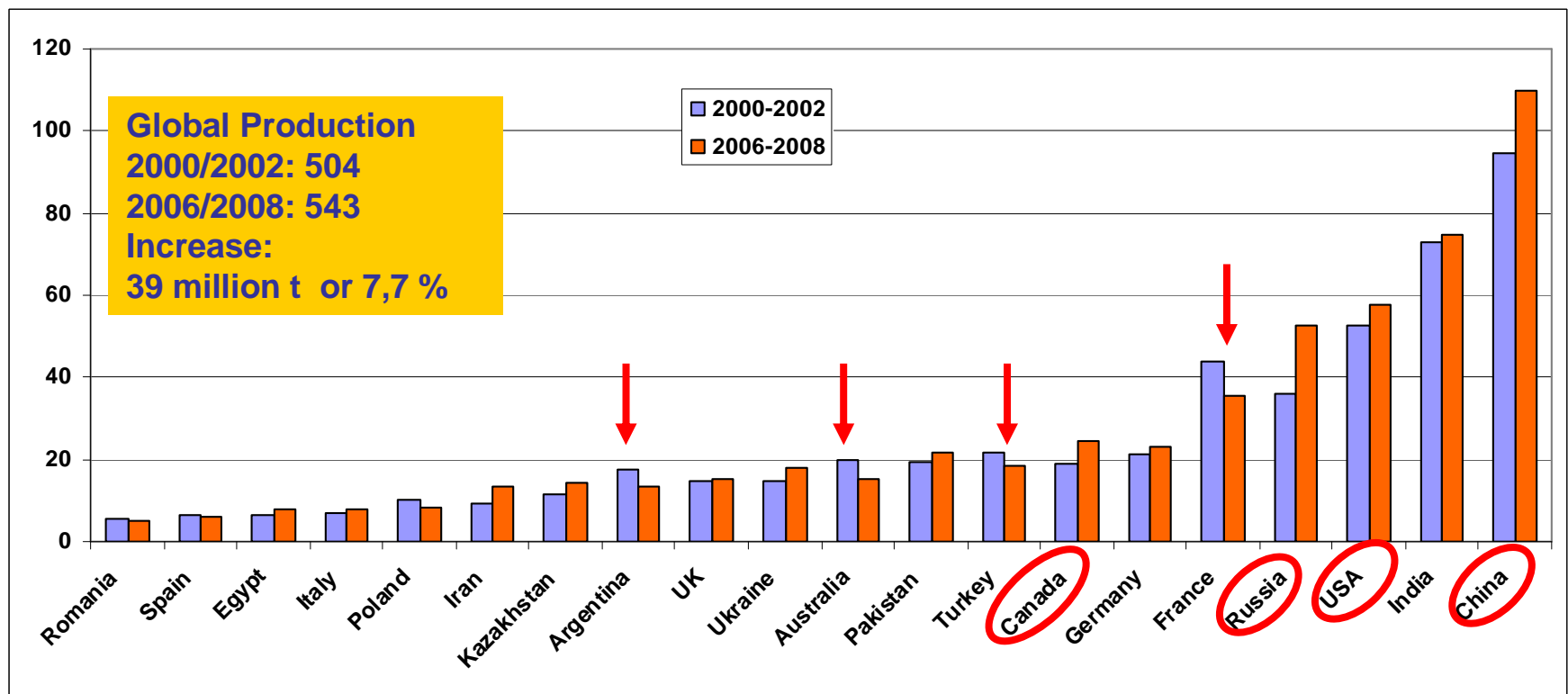
Total production: 590 million t



Top 5 producer account
for +60% of output

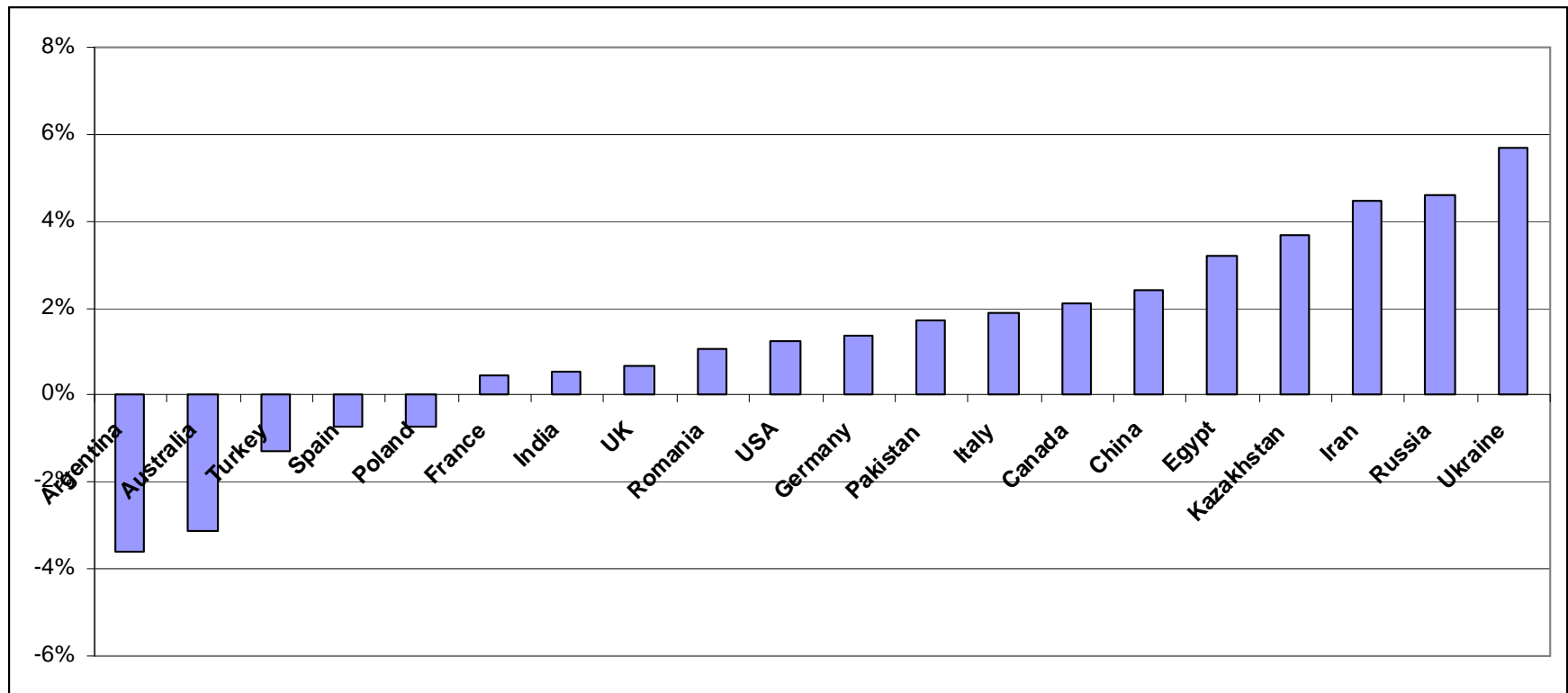
Evolution of Wheat Production

(in million t; av. 2000-2002 vs. av. 2006-2008)



- Almost all countries increased production, exceptions: AR, AU, TR, FR
- Strongest growth with the big three (CN, US, RU)
- CA: Increase in production even with reduced acreage

Growth rate in Wheat Production (in % p.a.)



Most dynamic development in the East

Key Findings and Conclusions

1. Global wheat acreage has undergone a structural change – some very big players like IN, AU, US, RU increased their acreage significantly while other big ones like AR, CA, TR reduced wheat acreage.
2. Global wheat acreage was almost flat from 2000 to 2008.
3. Global increase in yields of 1.6 % mainly came from medium to low yielding countries.
4. Growth in output almost exclusively came from intensification/yield growth.
5. Most dynamic increase in total production in the East – exception: India
6. Further research needed to identify reasons for structural change.

Knowledge is our Business

Thank you for your interest



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