



MEXICO

KEY STATS



#1
U.S. CORN
BUYER



#1
U.S. BARLEY
BUYER



#1
U.S. DDGS
BUYER

STRENGTHS

Mexico is one of the most important and loyal buyers of U.S. feed grains. Access to affordable grains and reliable shipments from the U.S. has helped Mexican swine, poultry and beef industries grow, accompanied by increasing imports of U.S. corn, sorghum and DDGS.



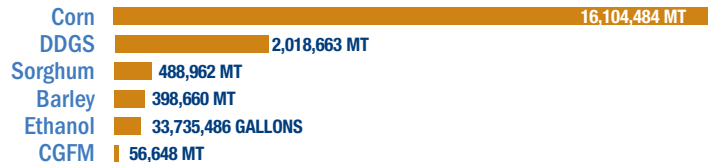
CHALLENGES

Only Canada is left to approve the U.S.-Mexico-Canada Agreement (USMCA). USMCA maintains duty-free access for U.S. coarse grains, co-products and ethanol and provides enforceable sanitary and phytosanitary standards and the first-ever biotech chapter in a U.S. trade agreement.

OPPORTUNITIES

Mexico remains a critical market for the entire U.S. grain industry with increasing feed demand due to a growing population and migration shift toward the major cities. Due to close geographic proximity and duty-free access, this growth in demand will benefit U.S. exporters.

KEY NUMBERS



GRAINS.ORG



U.S. GRAINS
COUNCIL

Source: USDA Foreign Agricultural Service's Global Agriculture Trade System report for marketing year Sept. 1, 2018, to Aug. 31, 2019. Grains in all forms (GIAF) converts volumes of exported U.S. corn, sorghum, barley, DDGS, corn gluten feed/meal (CGFM), ethanol and meat products into corn equivalents.

JAPAN



KEY STATS



#2
U.S. CORN
BUYER



#3
U.S. BARLEY
BUYER



#4
U.S. SORGHUM
BUYER

STRENGTHS

Japan is one of the largest and most loyal customers of U.S. coarse grains and co-products. The Council has worked in Japan for more than 50 years, helping local stakeholders grow the Japanese feed, livestock and starch industries.

CHALLENGES

Japan has a well-developed regulatory system for biotechnology, which requires open and continuous conversations with government biotech regulatory officials and non-government scholars who conduct reviews to ensure no interruptions in grain trade flows.



OPPORTUNITIES

The newly minted U.S.-Japan agreement will provide stability in the corn market, bring sorghum imports to a zero-tariff level and reduce the import markup on barley. Additional market access measures related to ethanol could be addressed in the next round of negotiations.

KEY NUMBERS



GRAINS.ORG



U.S. GRAINS
COUNCIL

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CANADA



KEY STATS



#2
U.S. ETHANOL
BUYER



#2
U.S. BARLEY
BUYER



#5
U.S. CORN
BUYER

STRENGTHS

Sharing the longest international border in the world and strong trade policy through the new United States-Mexico-Canada Agreement (USMCA), Canada is an extremely important market for coarse grains, DDGS and ethanol, especially for northern U.S. states.



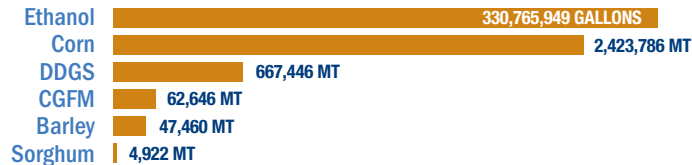
CHALLENGES

The Canadian livestock feed market is highly competitive with many alternative feed ingredients available. End-users are looking for a consistent supply of U.S. corn and DDGS and practical solutions to problems related to railroad timing, reliable offloading and other needs.

OPPORTUNITIES

Canada is a mature U.S. ethanol market. The government is developing a national Clean Fuel Standard (CFS), which includes ethanol's carbon intensity reductions. The CFS is set to take effect in 2021, but individual provinces like Ontario have already started a transition to E10.

KEY NUMBERS



GRAINS.ORG



**U.S. GRAINS
COUNCIL**

Source: USDA Foreign Agricultural Service's Global Agriculture Trade System report for marketing year Sept. 1, 2018, to Aug. 31, 2019. Grains in all forms (GIAF) converts volumes of exported U.S. corn, sorghum, barley, DDGS, corn gluten feed/meal (CGFM), ethanol and meat products into corn equivalents.

SOUTH KOREA



KEY STATS



#3
U.S. DDGS
BUYER



#4
U.S. CORN
BUYER



#4
U.S. BARLEY
BUYER

STRENGTHS

Working in South Korea since 1972, the Council has helped grow the country's livestock and corn-processing industries. Exports of U.S. grains in all forms to South Korea have increased 44% since the U.S.-Korea Free Trade Agreement (KORUS) went into effect in 2012.

CHALLENGES

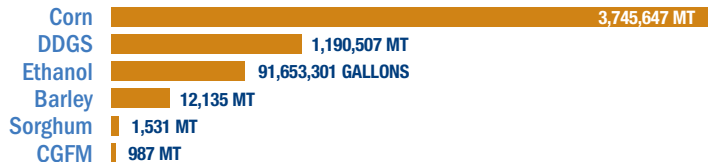
South Korea is considered a mature market, but competition from other exporters in South America and the Black Sea is intensifying. USGC programs play an important role in protecting existing markets for corn and DDGS and increasing demand for products like ethanol.

OPPORTUNITIES

South Korea ranks as the 5th largest market for U.S. ethanol, but only imports ethanol for industrial uses, like windshield wiper fluid. The Council is engaging Korean decision-makers as they work to address air pollution problems and discuss a potential national ethanol blend.



KEY NUMBERS



GRAINS.ORG



U.S. GRAINS
COUNCIL

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COLOMBIA



KEY STATS



#3
U.S. CORN
BUYER



#5
U.S. GIAF
BUYER



#7
U.S. ETHANOL
BUYER

STRENGTHS

The Council has actively worked on demand development in Colombia for more than 30 years. Since the U.S.-Colombia Free Trade Agreement went into effect in 2012, exports of U.S. grains in all forms exports to Colombia have increased more than 11-fold.



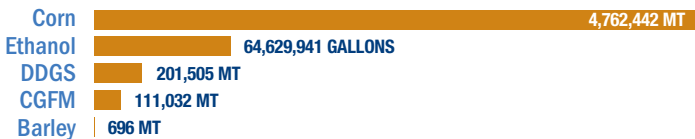
CHALLENGES

The Colombian government imposed non-tariff trade barriers that reduce U.S. ethanol export opportunities and initiated a countervailing duties case that could block U.S. exports. The Council is conveying how the U.S. helps stabilize supply when domestic ethanol can't meet demand.

OPPORTUNITIES

Poultry producers are Colombia's main feed grains consumers, estimated to use one-third of total corn consumption. The Council is working with the next generation of industry leaders to help them understand the U.S. competitive advantages of logistics, quality control and reliability.

KEY NUMBERS



GRAINS.ORG



U.S. GRAINS
COUNCIL

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BRAZIL

KEY STATS



#1
U.S. ETHANOL
BUYER



#6
U.S. GIAF
BUYER

STRENGTHS

Brazil and the United States represent both the two largest producers and the two largest consumers of ethanol globally. Each country remains the other's largest trading partner, despite the Brazilian government's imposition of a tariff rate quota (TRQ) on U.S. ethanol.



CHALLENGES

The Brazilian government placed seasonal restrictions on its tariff rate quota (TRQ) for U.S. ethanol that regulates the threshold of ethanol that can be imported into Brazil without triggering a 20 percent tariff. The Council has advocated for eliminating this trade barrier.

OPPORTUNITIES

RenovaBio, Brazil's new biofuels policy, aims to reduce carbon emissions in transportation fuel by 10 percent over 10 years, potentially increasing ethanol demand to nearly 10.5 billion gallons by 2028, from almost 7 billion gallons currently.

KEY NUMBERS

Ethanol

390,181,991 GALLONS

Barley | 4,696 MT

GRAINS.ORG



**U.S. GRAINS
COUNCIL**

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EUROPEAN UNION



KEY STATS



#2
U.S. SORGHUM
BUYER



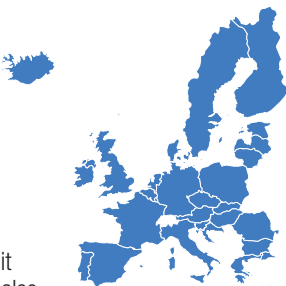
#4
U.S. ETHANOL
BUYER



#5
U.S. DDGS
BUYER

STRENGTHS

Sales of U.S. grains in all forms to the European Union were the second highest since 2010/2011 this past marketing year due to ample supplies of U.S. sorghum and DDGS, a drought in Europe that drove up the price of European feedstock and access to the market for these products.



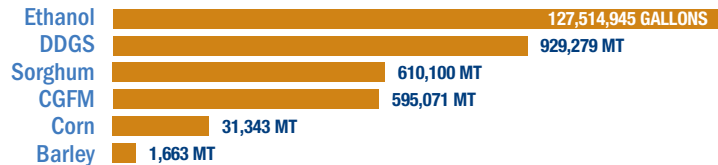
CHALLENGES

The lack of timely approvals of biotech events inhibit U.S. corn exports to the European Union. The EU is also moving to a hazard-based approach for registering pesticides, which would further challenge sales of U.S. ag goods in these markets.

OPPORTUNITIES

The potential for a trade agreement with the European Union could knock down tariff and non-tariff barriers to gain new market access. The Council is also working with buyers and end-users in the swine industry to demonstrate how sorghum and DDGS can help meet feed demand needs.

KEY NUMBERS



GRAINS.ORG



**U.S. GRAINS
COUNCIL**

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TAIWAN



KEY STATS



#5
U.S. BARLEY
BUYER



#7
U.S. CORN
BUYER



#8
U.S. GIAF
BUYER

STRENGTHS

Taiwan is an import-dependent economy that prefers U.S. ag products because of their quality, affordability and safety. With more than 45 years of partnership between the Council and the livestock industry, Taiwan consistently imports U.S. coarse grains and co-products.

CHALLENGES

Some legislators and activists in Taiwan are working to ban genetically modified food ingredients, including in school meals. The Council continuously engages with legislators and feed millers to better understand how their feed ingredients - U.S. corn and DDGS - are produced.

OPPORTUNITIES

Taiwan is a significant market for U.S. DDGS and the U.S. accounts for 95 percent of the DDGS imported by almost all large feed mills in Taiwan. The Council is exploring opportunities to promote value-added products like high-protein DDGS or increase price competitiveness.



KEY NUMBERS



GRAINS.ORG



**U.S. GRAINS
COUNCIL**

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CHINA



KEY STATS



#1
U.S. SORGHUM
BUYER



#9
U.S. GIAF
BUYER

STRENGTHS

China is the world's second largest corn consumer and, previously, was the top importer of U.S. sorghum and DDGS. These products helped supply the world's largest swine, aquaculture and egg industries, the second largest poultry industry and growing dairy and beef operations.



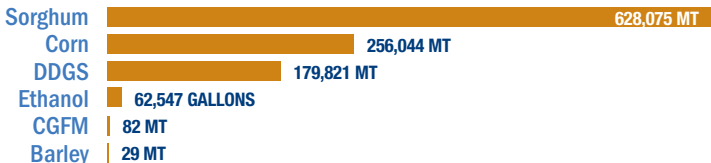
CHALLENGES

The trade dispute with China saw a dramatic 81 percent decline in exports since 2015/2016, with shipments of U.S. grains in all forms totaling just 2.7 million metric tons (106 million bushels) in the 2018/2019 marketing year. A slow biotech approval process has also limited exports.

OPPORTUNITIES

U.S. President Donald Trump and Chinese Vice Premier Liu He signed a Phase 1 trade deal in January 2020, promising extensive new sales of U.S. agricultural products and sweeping changes to non-tariff trade barriers that have stymied U.S. ag's participation in the Chinese market.

KEY NUMBERS



GRAINS.ORG



**U.S. GRAINS
COUNCIL**

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PERU

KEY STATS



#6
U.S. CORN
BUYER



#8
U.S. ETHANOL
BUYER



#10
U.S. GIAF
BUYER

STRENGTHS

The U.S.-Peru Trade Promotion Agreement has been instrumental in boosting bilateral trade. Overall, sales of U.S. coarse grains, co-products and ethanol to Peru have increased more than seven-fold since the agreement went into effect in 2009.

CHALLENGES

Peru initiated a countervailing duty case against U.S. corn in 2018. The Council worked with the Peruvian industry to protect the market and a recent decision in the case supported open trade. A separate, but still active, case in Peru seeks to limit U.S. ethanol exports.

OPPORTUNITIES

The Council's efforts in Peru have focused on the largest poultry and dairy producers. Now, the Council is expanding outreach to other potential end-users representing mid-size poultry companies and the beef cattle sector to create additional demand for products like DDGS.



KEY NUMBERS



GRAINS.ORG



U.S. GRAINS
COUNCIL

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INDIA

KEY STATS



#3
U.S. ETHANOL
BUYER



#11
U.S. GIAF
BUYER

STRENGTHS

India is one of the world's fastest-growing economies with a young population. As Indians move up the economic ladder, the demand for animal protein and fuel will also continue to grow exponentially - leading to a corresponding demand for coarse grains, co-products and ethanol.



CHALLENGES

Trade barriers - biotechnology restrictions, tariffs and sanitary-phytosanitary measures - prohibit ethanol blending into gasoline and inhibit the entry of U.S. coarse grains and co-products into India. USGC programs are offering solutions to Indian needs through trade.

OPPORTUNITIES

India imported nearly 203 million gallons of U.S. ethanol in 2018/2019, but only for industrial uses. The Council is making the case in India that increased ethanol blending in fuel can help the country achieve foreign exchange savings and improve air quality.

KEY NUMBERS

Ethanol	202,848,815 GALLONS
DDGS	3,011 MT
Corn	83 MT
Barley	17 MT

GRAINS.ORG



U.S. GRAINS
COUNCIL

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VIETNAM

KEY STATS



#2
U.S. DDGS
BUYER



#12
U.S. GIAF
BUYER

STRENGTHS

Vietnam is one of the fastest growing feed and fuel markets in the world. A middle class growing in number and influence is increasing demand for meat, milk and eggs. Total gasoline consumption is also expected to grow by nearly 15 percent by 2022.

CHALLENGES

The outbreak of the African Swine Fever (ASF) virus affected a large portion of swine herds. The Council is working with local feed mills and DDGS importers to assist farms devastated by ASF to switch to poultry, layer or duck farming rather than give up meat production.

OPPORTUNITIES

The Council is supporting the Vietnamese government and industry as they work to increase ethanol use under an E5 blend mandate. As part of this work, the sole ethanol producer in Vietnam tested U.S. corn as a feedstock with a hammer mill purchased during a mission to the U.S.



KEY NUMBERS

DDGS	1,297,141 MT
Corn	65,332 MT
Ethanol	3,506,488 GALLONS
CGFM	19,663 MT
Barley	328 MT

GRAINS.ORG



U.S. GRAINS
COUNCIL

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GUATEMALA



KEY STATS



#8
U.S. CORN
BUYER



#13
U.S. GIAF
BUYER

STRENGTHS

Guatemala is a member of the Dominican Republic-Central America Free Trade Agreement (CAFTA-DR), which provides favorable tariff treatment for products like corn and DDGS. The proximity of this Central American market also facilitates the movement of U.S. agricultural goods.



CHALLENGES

Guatemala is particularly vulnerable to extreme weather events that hinder both agricultural production and transport of agricultural goods. Guatemala is also facing political uncertainty in a run-up to elections in the country that can affect economic growth.

OPPORTUNITIES

Guatemala does not yet commercially use DDGS, but the Council is working to build confidence in potential buyers by sharing the experience of decision-makers for successful beef and dairy operations in Mexico - triggering trials to test out DDGS in their Guatemalan businesses.

KEY NUMBERS

Corn	1,215,811 MT
DDGS	75,909 MT
CGFM	6,083 MT
Barley	186 MT
Ethanol	20,124 GALLONS

GRAINS.ORG



U.S. GRAINS
COUNCIL

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PHILIPPINES

KEY STATS



#6
U.S. ETHANOL
BUYER



#10
U.S. DDGS
BUYER



#14
U.S. GIAF
BUYER

STRENGTHS

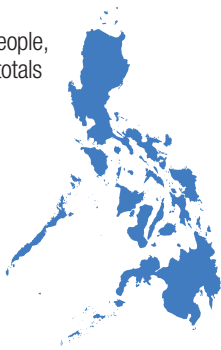
The Philippines has a population of more than 106 million people, with rising middle-class incomes. As a result, feed demand totals 18 million metric tons and growing. The Philippines is also expanding its vehicle fleet, along with its ethanol production and import system.

CHALLENGES

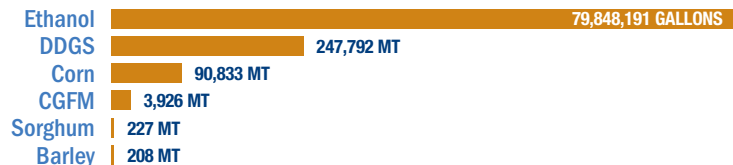
Trade policy restrictions on corn currently limit U.S. market share in the Philippines. The Council and end-user partners are petitioning to remove these barriers. The Council is also conducting technical workshops to address product misconceptions for sorghum, DDGS and barley.

OPPORTUNITIES

Ethanol producers, trade groups, government agencies, regulatory boards and even oil companies worked together in implementing an E10 mandate in the Philippines, which includes a role for ethanol trade. The Philippines is now looking toward fulfilling an E20 mandate.



KEY NUMBERS



GRAINS.ORG



U.S. GRAINS
COUNCIL

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INDONESIA



KEY STATS



#3
U.S. CGFM
BUYER



#4
U.S. DDGS
BUYER



#16
U.S. GIAF
BUYER

STRENGTHS

The fourth most-populous country, members of Indonesia's middle class are dedicating part of their increased incomes to upgraded transportation options, driving up fuel demand. Indonesia is also increasing U.S. DDGS imports, setting a record for a third straight year in 2018/2019.



CHALLENGES

Only four Indonesian companies have permits to import corn, all using it for human food starch production. The buyers can source from South America or the U.S., so the Council is working to address quality misperceptions and restore confidence in the U.S. corn export system.

OPPORTUNITIES

Indonesia currently imports half of its finished gasoline demand. Finished gasoline qualifies for duty-free access into Indonesia, meaning importers could purchase pre-blended E10 and save millions annually while improving air quality and reducing greenhouse gas emissions.

KEY NUMBERS



GRAINS.ORG



**U.S. GRAINS
COUNCIL**

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HOW WE BUILD GLOBAL GRAIN DEMAND

The U.S. Grains Council works in more than 50 countries and the European Union to develop new markets for U.S. corn, sorghum, barley, distiller's dried grains with solubles (DDGS) and ethanol.



Trade Teams & Missions

Building lasting relationships with end users benefits the entire marketing channel.



Technical Education & Contracting Education

Helping customers know how to buy and use U.S. grains is critical to meeting their needs.



Information & Research

Offering access to current data helps buyers recognize the comparative advantage of U.S. origin.



Trade Policy & Market Capacity Building

Engaging in local markets positions U.S. grains for worldwide opportunity.



Conferences & Trade Shows

Building awareness of U.S. grains among international representatives through strategic presence is critical to success.



Business-to-Business Relationships

Partnering with industry leaders catalyzes change for stronger, more dynamic importing industries.

GRAINS.ORG



**U.S. GRAINS
COUNCIL**