

Canned Sweet Corn Situation and Outlook in Selected Countries

Global exports of canned sweet corn (CSC) were nearly \$353 million in CY 2001, up 6 percent from CY 2000. The largest exporter of CSC, France, increased its global market share from 31 percent in 1999 to nearly 38 percent in 2001. The U.S. share of global CSC exports has declined to 35 percent from 42 percent in 1999. Thailand has increased its exports of CSC to nearly \$22 million (an increase of nearly 40 percent) and increased its global market share to 6 percent in 2001. While Thailand remains an important competitor for the United States, the country is facing a supply constraint due to flooding in the production areas.

Trade

Global exports of canned sweet corn (CSC) were nearly \$353 million in CY 2001, up 6 percent from CY 2000. The top five exporting countries, accounting for 88 percent of all CSC exports were: France, the United States, Thailand, Canada, and Belgium. Global imports of CSC were valued over \$405 million for 2001. Japan, Germany, the United Kingdom (U.K.), South Korea and Taiwan accounted for nearly 58 percent of total CSC imports.

Canned Sweet Corn: Leading Exporters and Importers

Leading Exporters	World Share (percent)	Leading Importers	World Share (percent)
France	37.73	Japan	18.1
United States	34.79	Germany	15.9
Thailand	6.21	United Kingdom	11.9
Canada	4.85	South Korea	7.4
Belgium	4.62	Taiwan	4.7
Rest of World	11.79	Rest of World	42.1
Total	100.00		100.00

Source: World Trade Atlas

France

France surpassed the United States in 2001 to become the world's leading exporter of canned sweet corn with exports valued at \$133 million. France increased its global market share from 31 percent in 1999 to nearly 38 percent in 2001. France's major markets include Germany (23.9 percent), U.K. (19.5 percent), and Spain (18.2 percent).

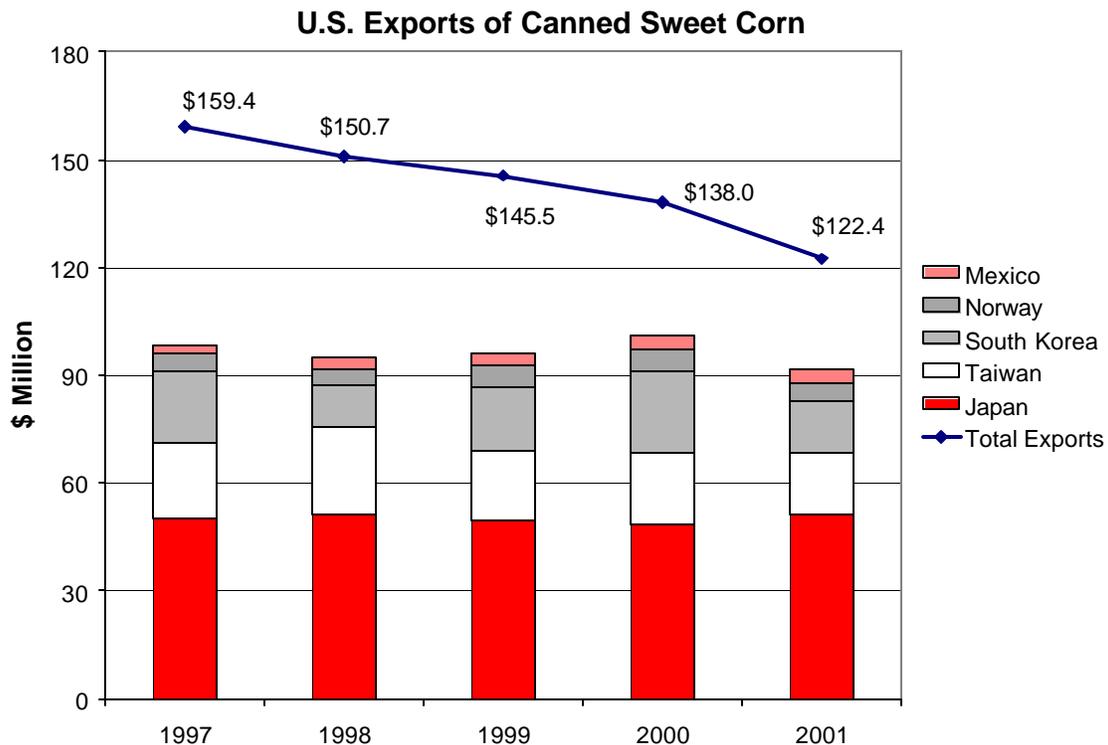
The area for sweet corn production has increased by an estimated 2,820 hectares (ha) to 28,000 ha in 2002. French production of CSC is forecast to be 272,000 metric tons for 2002, more than a 2,000-ton increase over 2001. Despite French concerns about

biotechnology issues, production of sweet corn has increased, primarily as a response to export demand.

United States

U.S. exports of CSC have declined steadily since 1997 to \$122 million in 2001. The U.S. share of global CSC exports has declined to 35 percent from 42 percent in 1999. In the face of declining global market share, the top five markets for U.S. CSC have remained relatively stable, averaging \$96 million from 1997 to 2001. Total U.S. exports of CSC for the first 10 months of 2002 are 1.4 percent above the same period of the prior year.

USDA's Economic Research Service forecasts 1.4 million tons available for canning in 2001. Imports of sweet corn for canning also rose to 53,000 tons up from 52,000 tons in 2000. Per capita consumption of sweet corn was 4.3 kilograms in 2000 compared to a forecast 3.8 kilograms in 2002.



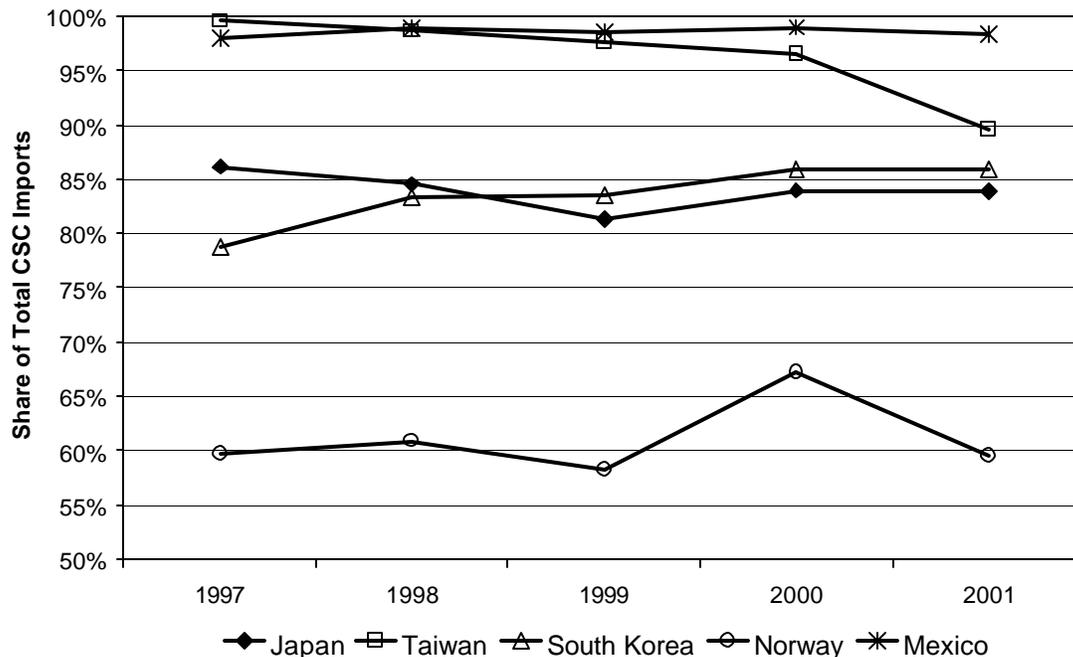
While the United States maintains a dominant share in its top five markets, it is facing increasing third-country competition. The U.S. market share in Japan has remained relatively stable; however, the emergence of China, Canada, and Thailand as important competitors may signal a new intensity in the battle for market share.

For Taiwan, the U.S. share of CSC was nearly 100 percent in 1997. By 2001, the market share had slid to just under 90 percent as result of competition from Thailand. For

January through August 2002, a decline in imports and increasing Thai competition has caused U.S. exports to drop 18 percent from this time last year.

While South Korea has two main suppliers of CSC, the United States and Thailand, the U.S. share of South Korean imports of CSC has grown since 1996 to reach 86 percent. The largest U.S. competitor for the Norwegian CSC market is Canada. Canadian market share has averaged 22 percent and is increasing. Growing imports from Thailand and France have increased the competition in this market. The U.S. is firmly entrenched as the main supplier of CSC to Mexico, accounting for an average 98 percent since 1995.

U.S. Share of Total CSC Imports for Selected Countries



Thailand

Thailand has increased its exports of CSC to nearly \$22 million (an increase of nearly 40 percent) and increased its global market share from 5 percent in 1999 to 6 percent in 2001. Thai CSC exports increased 43 percent to South Korea, increased 114 percent to Taiwan, and increased 2 percent to Japan. Total exports during January to August 2002 rose over 51 percent compared to the corresponding time last year. However, Thailand is facing a fresh sweet corn supply constraint due to flooding in the production areas. This may represent a temporary opportunity for U.S. exports to recapture lost market share as exports of Thai CSC decline.

(The FAS Attaché Report engine contains reports on processed sweet corn for 4 countries, including the United States, Thailand, France, and Germany. For information on production and trade, contact Kyle Cunningham at 202-720-0875. For information on marketing contact Elizabeth Mello at 202-720-9903. For additional information on sweet corn, please visit our processed vegetables web page at: http://www.fas.usda.gov/htp/horticulture/Proc_Veg.html)

U.S. Sweet Corn for Canning

Year	Production 1/	Imports 2/	Exports 2/
Thousand Metric tons			
1990	1521.2	21.9	319.4
1991	1755.9	19.9	323.5
1992	1671.2	18.0	368.1
1993	1325.2	17.7	427.0
1994	1923.1	23.9	366.9
1995	1548.6	22.4	400.7
1996	1563.6	9.6	437.4
1997	1494.4	13.0	477.2
1998	1506.7	21.0	462.4
1999	1584.7	28.0	455.1
2000	1544.0	29.7	432.0
2001	1376.7	43.4	361.8
2002 f	1362.6	52.2	369.1
2003 f	1496.9	53.2	376.4

Source: USDA ERS

1/ Source: National Agricultural Statistics Service, USDA. 2/ Source: Bureau of the Census, U.S. Dept. of Commerce. All product weight data was converted to a fresh weight basis using a factor of 2.463.