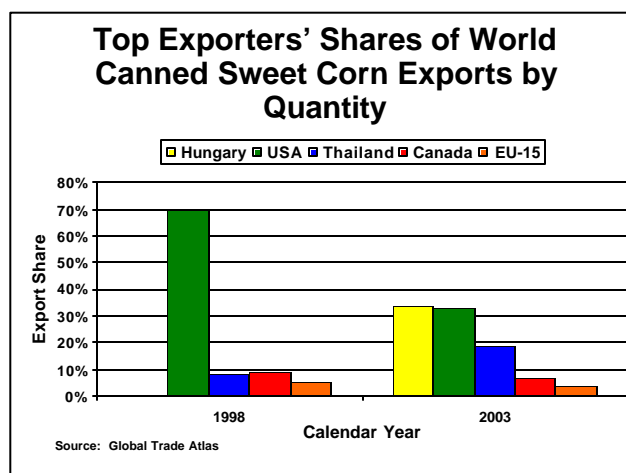
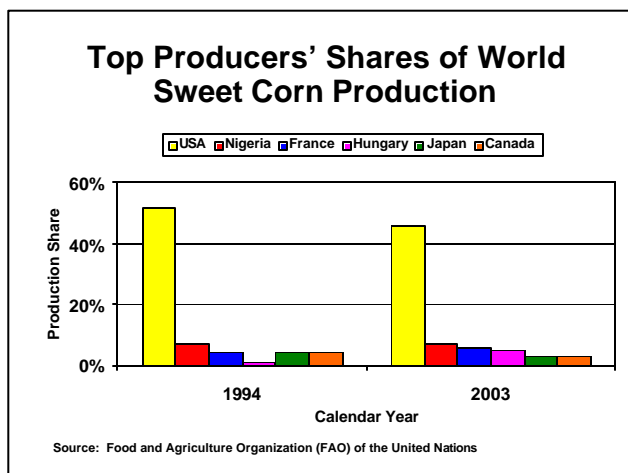


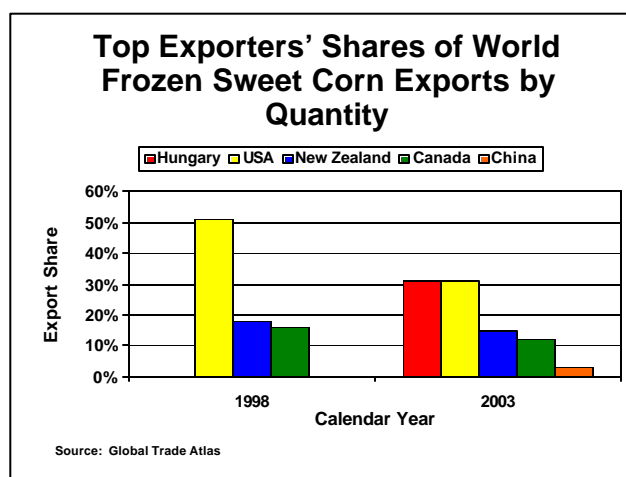
Processed Sweet Corn Situation and Outlook for Selected Countries

The world's leading producers and exporters of fresh and processed sweet corn include the United States, Hungary, and Thailand. However, the U.S. share of world processed sweet corn exports by quantity has been shrinking over the last decade, dropping from 70 percent in 1998, to 33 percent in 2003. Over the same period, the U.S. share of world frozen sweet corn exports slipped from 50 percent to 30 percent. In contrast, Hungary and Thailand's shares of canned and frozen sweet corn grew rapidly over this period. Furthermore, Hungary just surpassed the United States to become the largest exporter of processed sweet corn.



France

France is the third largest sweet corn producer in the world. Canned sweet corn accounts for the majority of production of France's processed sweet corn. The 2003 French sweet corn crop was hurt by severe heat, drought, and corn ear worm. As a result, 2003 French sweet corn production is estimated down 20 percent. The EU-15 was the fifth largest canned sweet corn exporter in 2003, accounting for only about 5 percent of the world's exports. Hungary's new membership into the EU-25 will greatly augment the EU's rank as a processed sweet corn exporter since Hungary is presently the world's largest exporter of canned and frozen sweet corn. For more information on France, see attaché report #FR3054.



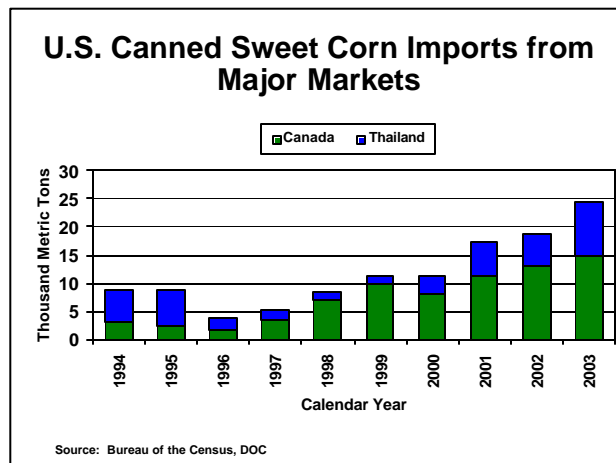
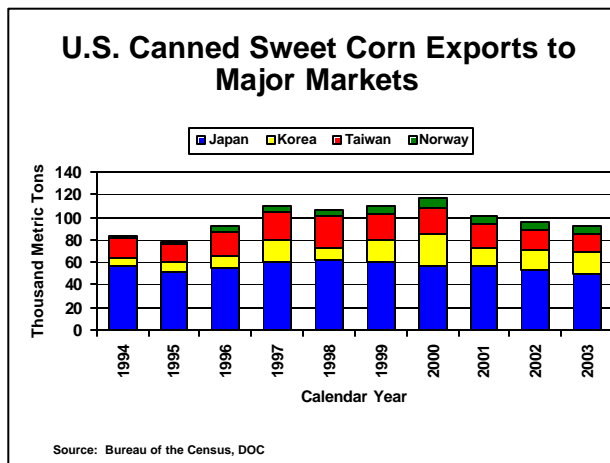
Hungary

Over the last several years, Hungary has grown from an insignificant exporter to the world's largest exporter of processed sweet corn by quantity. By 2003, Hungary acquired a 34-percent share of world canned sweet corn exports and a 31-percent share of world frozen sweet corn

exports at the expense of the U.S. share. In 2003, Hungary exported about 148,000 tons of canned sweet corn and close to 50,000 tons of frozen sweet corn.

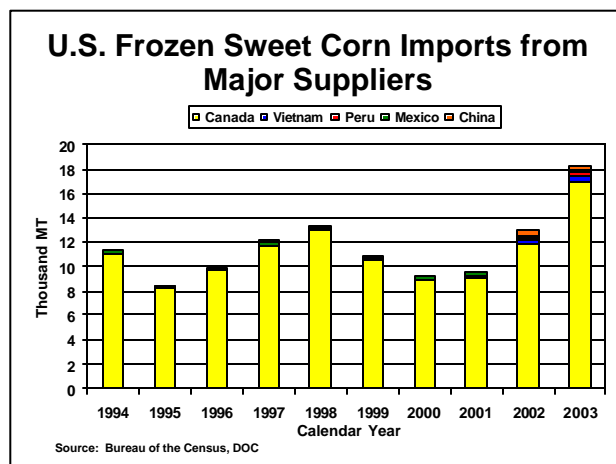
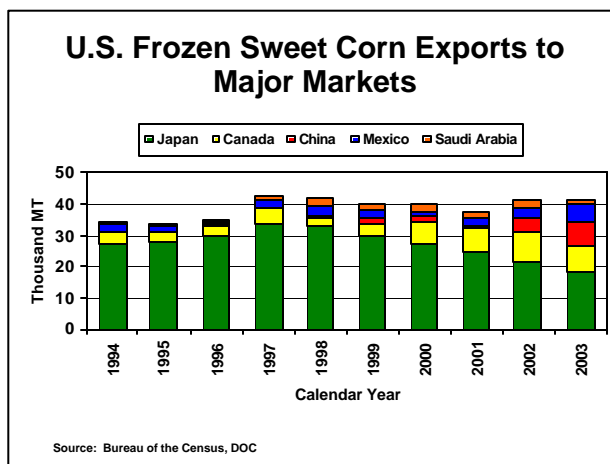
Thailand

Thailand's production and exports of processed sweet corn have grown steadily over the last several years. In 2003, Thailand ranked as the world's eighth largest sweet corn producer and the third largest exporter of canned sweet corn. In this same year, Thailand acquired a 20-percent share (76,118 tons) of the world canned sweet corn exports at the expense of the U.S. share. For more information on Thailand, see attaché report #TH3120.

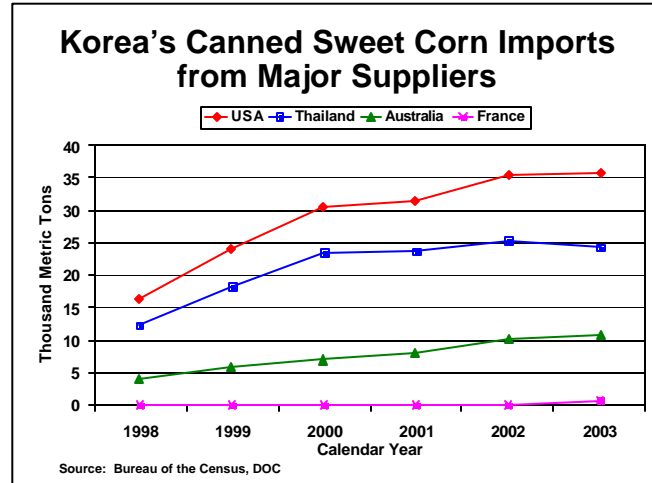


United States

The United States is a net exporter of processed sweet corn. However, over the last decade, total U.S. processed sweet corn exports and shares have declined. From 1998-2003, U.S. canned sweet corn exports dropped 30 percent to 132,851 tons. Over the same period, the U.S. share of canned sweet corn exports plummeted from almost 70 percent to 33 percent, while Hungary and Thailand gained much of the lost U.S. share.



The top export market for U.S. canned sweet corn in 2003 was Japan with 49,284 tons (40-percent share), followed by Korea (15 percent share), and Taiwan (12 percent). Exports to Japan have dropped 12 percent over the last decade, due mainly to Japan's economic crisis and increased competition. In contrast, U.S. canned sweet corn exports to Korea have more than doubled. In 2003, the United States had a 67 percent share of Korean canned sweet corn imports. However, over the last few years, the U.S. share of Korea's canned sweet corn imports has dropped while the Thai and EU shares have been growing.



The U.S. export share of frozen sweet corn fell from 51 percent in 1998 to 31 percent in 2003, while Hungary gained much of the lost U.S. share. From 1994-2003, U.S. frozen sweet corn exports peaked at almost 55,000 tons in 1998, then finished slightly above the 1994 level at 41,000 tons in 2003. The main markets for U.S. frozen sweet corn exports are Japan, Canada, and China. Over the last decade, exports to Japan dropped dramatically, while exports to Canada, China, and Mexico more than doubled.

(The FAS attaché report search engine contains reports on the selected vegetable industries for selected countries and can be found at <http://www.fas.usda.gov/scripts/attacherep/default.asp>. For information on production and trade, contact Shari Kosco at 202-720-2083. For information on marketing, call 202-720-7931.)