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# Wheat Outlook

**Gary Vocke and Edward Allen**

## Record World Wheat Production

Projected U.S. 2004/05 ending stocks of wheat are unchanged from last month as no changes are made to supplies or usage. The projected price range is narrowed by 5 cents on either end to \$3.00 to \$3.50.

World wheat production is projected to reach a record 610.6 million tons, up almost 2 million tons this month. Increased yields have been reported for Ukraine, Romania, and parts of the EU-25, but production prospects were reduced for Kazakhstan and Australia. Global consumption projections for 2004/05 also increased almost 2 million tons this month, leaving forecast global ending stocks virtually unchanged. Projected U.S. wheat exports remain unchanged this month, but while Kazakhstan's expected exports dropped, export prospects for Ukraine, Romania, Bulgaria, and Uzbekistan increased.

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Approved by the  
World Agricultural  
Outlook Board.

## Domestic Outlook

### *U.S. Spring Wheat Harvest Delayed*

With crop development delayed by cool summer conditions, harvest progress was over 3 weeks behind normal in Minnesota and over 2 weeks behind in North Dakota. For the six States that harvested 99 percent of last year's spring wheat acreage, only 62 percent of the crop had been harvested as of September 5, 2004, 34 points behind last year and 21 points behind normal as reported in *Crop Progress*.

### *U.S. Winter Wheat Planting Underway*

Growers had planted 7 percent of their acreage, 1 point ahead of last year and 2 points ahead of normal as reported in *Crop Progress*. Planting had begun throughout the Great Plains, but was most advanced in Washington, where 21 percent of the expected acreage had been planted, 2 points behind normal. Winter wheat sowing had not begun in the Corn Belt.

### ***Record World Wheat Production Expected in 2004/05***

World wheat production is projected to reach a record 610.6 million tons, up almost 2 million tons this month, and slightly higher than the level reached in 1997/98. Wheat harvests across the Northern Hemisphere are mostly done or in progress, so more complete data are becoming available for several countries. Increased yields or improved yield prospects have been reported for several countries, while reductions this month were fewer.

Ukraine's wheat production increased 1.5 million tons this month to 17.5 million. Above-normal rainfall through most of the growing season and the harvest of a higher-than-average percentage of planted area are boosting production prospects. Growing conditions were similarly favorable in nearby Romania, and 2004/05 production is expected to reach 6.4 million tons, up 1.2 million this month. Wheat production prospects increased nearly 1 million tons in the EU-25, with sharply higher yields reported for Hungary and the Czech Republic, but reductions reported for the UK and Poland. Excessive rains and a very cool summer have diminished UK's production prospects.

Production was reduced 2 million tons to 10 million for Kazakhstan because of extended dryness in the western part of the wheat-growing region. Australia's production prospects were reduced 0.5 million tons to 23.5 million because of long-term drought in northeastern growing regions and a lower production forecast by the Australian Bureau of Agricultural and Resource Economics (ABARE) based on farmer surveys.

### ***Increase in Projected World Wheat Use Matches the Production Increase***

World wheat use is expected to reach 601 million tons in 2004/05, up 2 million tons this month. Because of increased production, wheat use prospects are increasing in the EU-25 (up 0.95 million tons to 115 million) and several countries of the former Soviet Union (up 0.925 to 72 million), but were not reduced in some of the countries with lower production prospects, notably Kazakhstan and Australia. The EU-25 is expected to feed more wheat as rains during harvest across the northern countries, especially the UK, have increased the supply of feed-quality wheat.

With the increase in projected use nearly matching the increase in world production, forecast global ending stocks are virtually unchanged this month at 142 million tons. However, there are several offsetting changes in different countries. Expected ending stocks in the former Soviet Union are down 0.55 million tons this month as the 1-million-ton drop in Kazakhstan and a 0.7-million-ton drop in Uzbekistan, are only partly offset by increases for Ukraine, Russia, and several other republics. Stocks are down in Uzbekistan because production is lower this month, and 2003/04 trade data indicate significant exports to neighboring countries, reducing beginning stocks. Conversely, Russia's 2004/05 ending stocks are up because 2003/04 trade data indicated smaller-than-expected exports. Romania's projected ending stocks are up 0.9 million tons to 1.7 million tons because of the larger crop, and Australia's expected ending stocks are down 0.5 million tons to 5.9 million tons due to a smaller crop.

## World Wheat Trade for 2004/05 Little Changed This Month

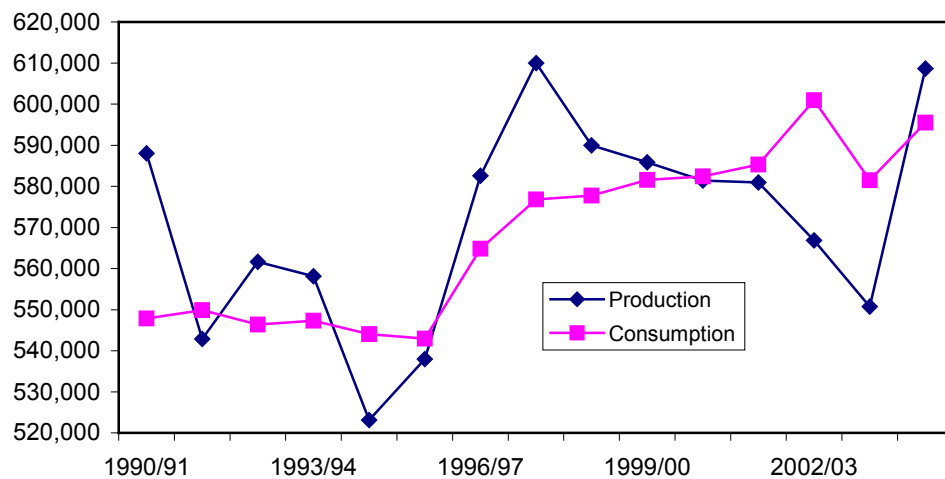
World wheat trade for 2004/05 is projected to reach 105 million tons, unchanged this month. While no significant changes were made to projections for importers, several offsetting changes were made for exporters. Kazakhstan's projected exports were reduced 1 million tons to 4.5 million tons because of reduced production prospects. This decline was offset by increases for Ukraine, up 0.5 million tons, Romania, up 0.3 million tons, and Bulgaria, up 0.1 million tons--all because of increased production. Exports by Uzbekistan for 2004/05 were increased by 0.1 million tons because 2003/04 exports to neighboring countries are not likely to halt completely because of a slightly lower crop in 2004/05.

U.S. wheat exports for 2004/05 (July-June trade year) remained unchanged this month at 25.5 million tons (25.86 million tons, or 950 million bushels for the June-May marketing year), down 21 percent compared with exports for the previous year. While Census trade data indicate that exports during June and July exceeded year-earlier levels, export inspections for August were less than a year ago, indicating that the slowdown in exports has begun. However, according to *U.S. Export Sales*, as of the beginning of September 2004, outstanding sales were still larger than a year earlier. As the season progresses and competitors' supplies become increasingly available for export, U.S. export sales are expected to drop dramatically.

Figure 1

### World wheat production and consumption

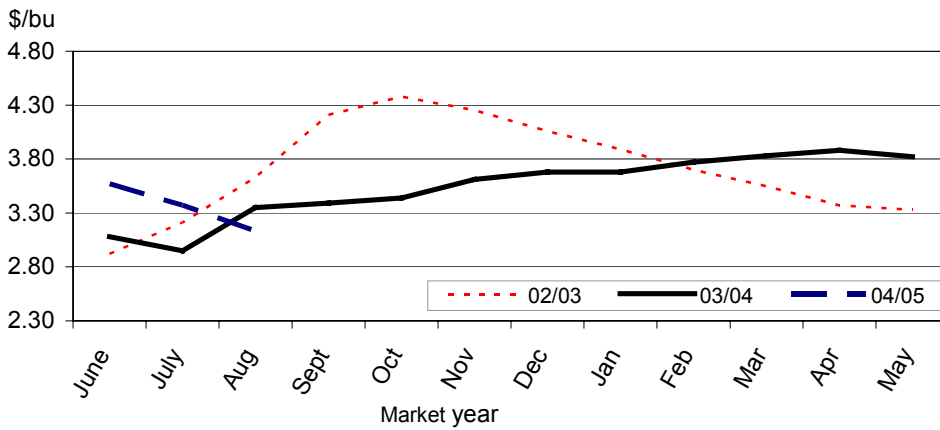
Thousand metric tons



Source: Foreign Agricultural Service, USDA.

Figure 2

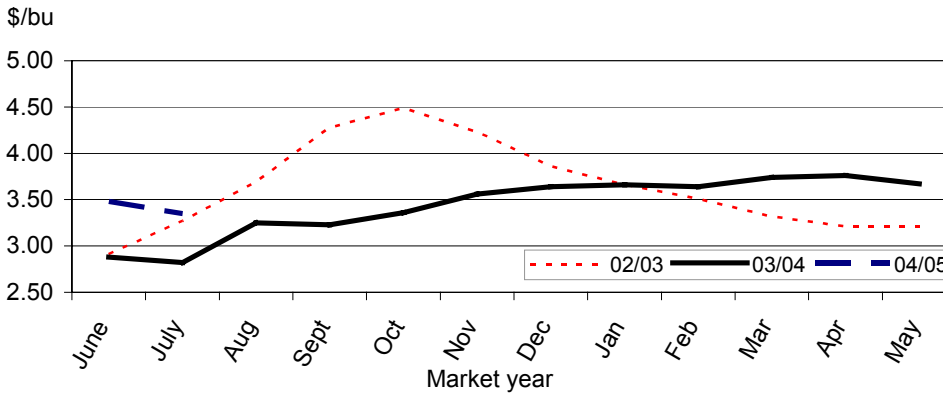
**All wheat average prices received by farmers**



Source: *Agricultural Prices*, NASS, USDA.

Figure 3

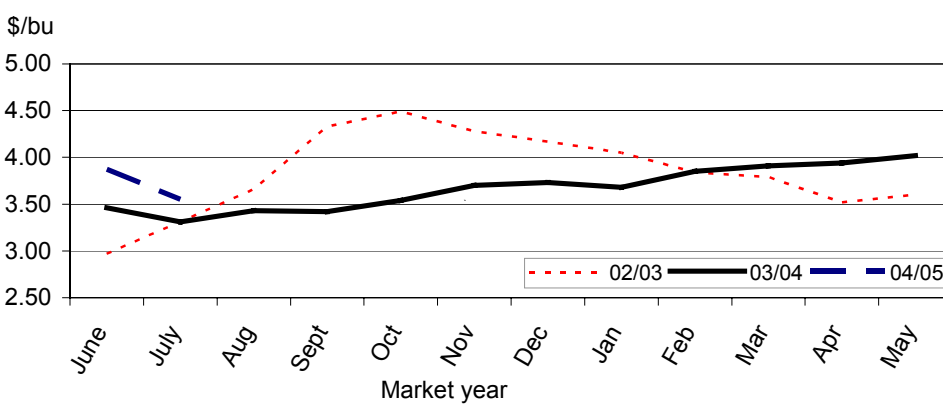
**Hard red winter wheat average prices received by farmers**



Source: *Agricultural Prices*, NASS, USDA.

Figure 4

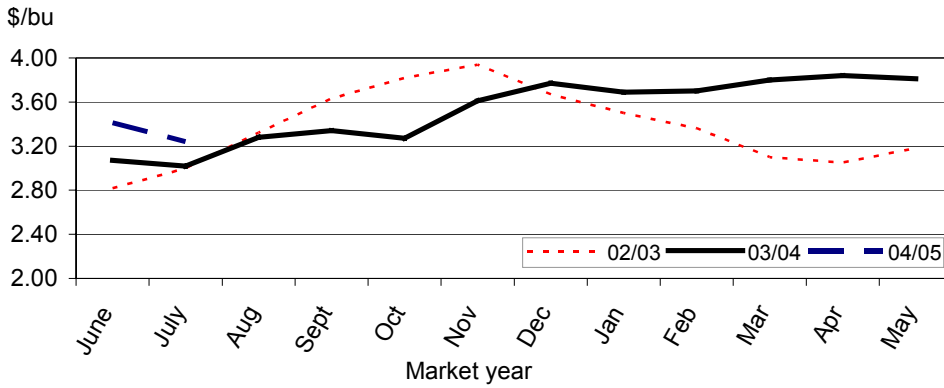
**Hard red spring wheat average prices received by farmers**



Source: *Agricultural Prices*, NASS, USDA.

Figure 5

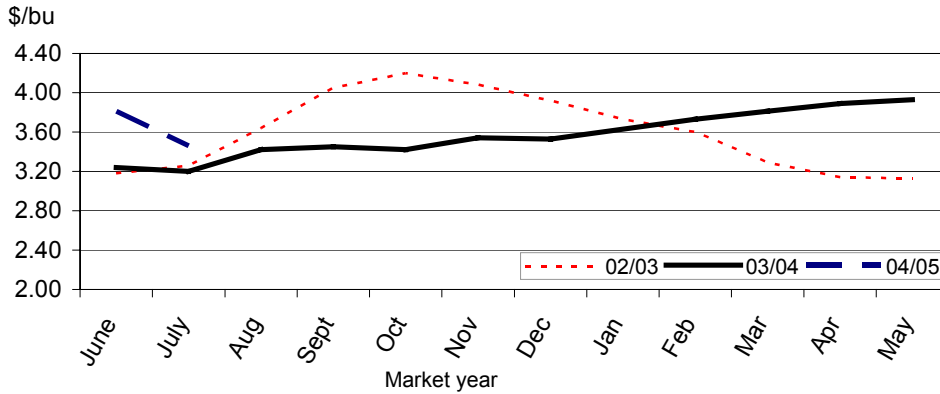
**Soft red winter wheat average prices received by farmers**



Source: *Agricultural Prices*, NASS, USDA.

Figure 6

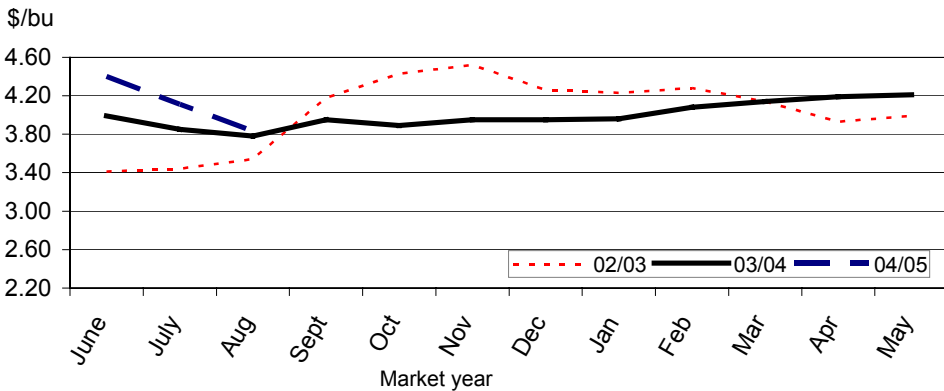
**Soft white wheat average prices received by farmers**



Source: *Agricultural Prices*, NASS, USDA.

Figure 7

**Durum wheat average prices received by farmers**

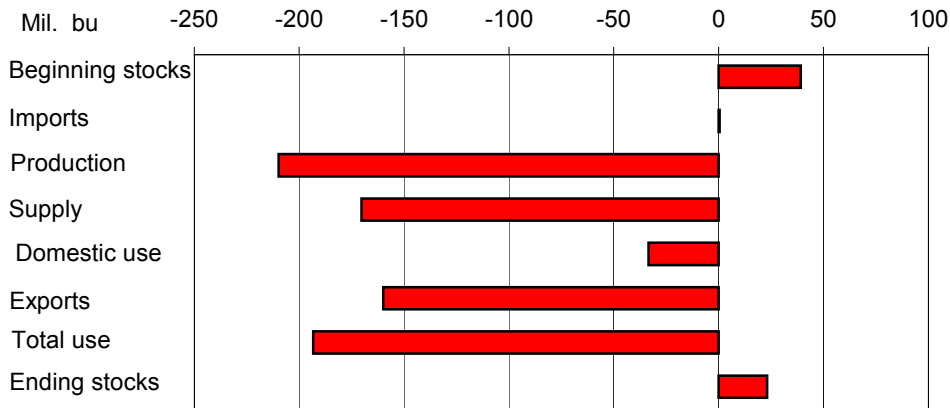


Source: *Agricultural Prices*, NASS, USDA.

**Changes From Previous Marketing Year, 2002/03 to 2003/04**

Figure 8

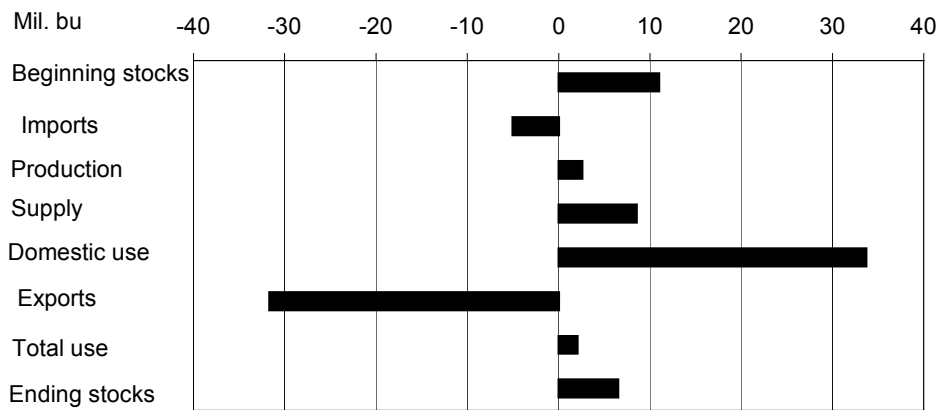
**Hard red winter wheat**



Source: WASDE, USDA.

Figure 9

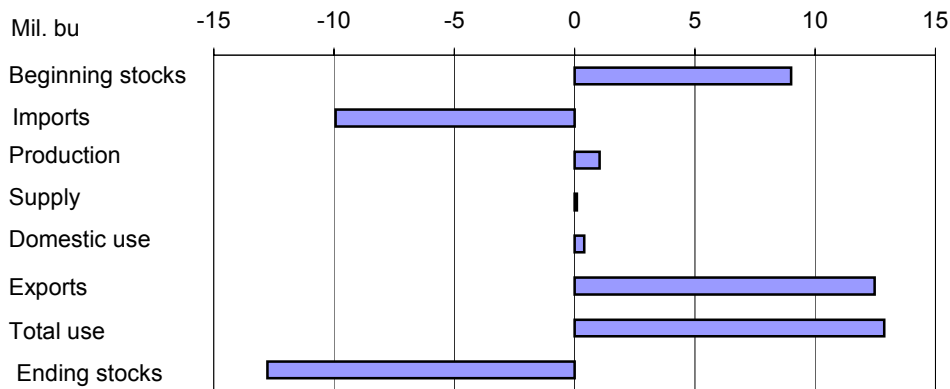
**Hard red spring wheat**



Source: WASDE, USDA.

Figure 10

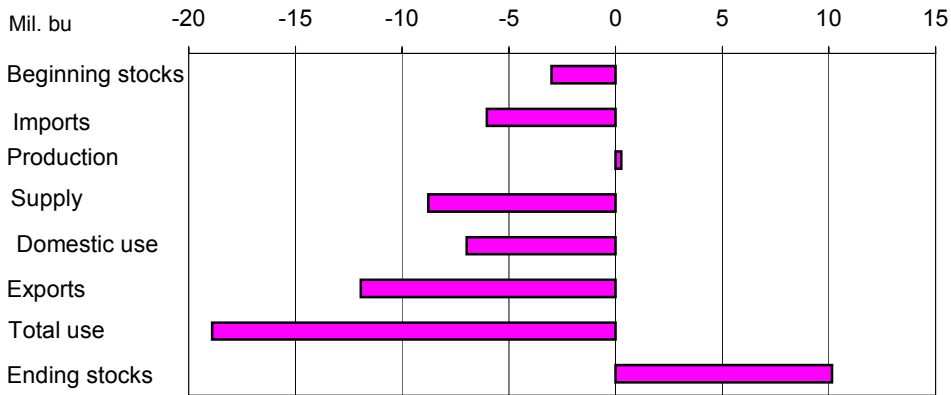
**Soft red winter wheat**



Source: WASDE, USDA.

Figure 11

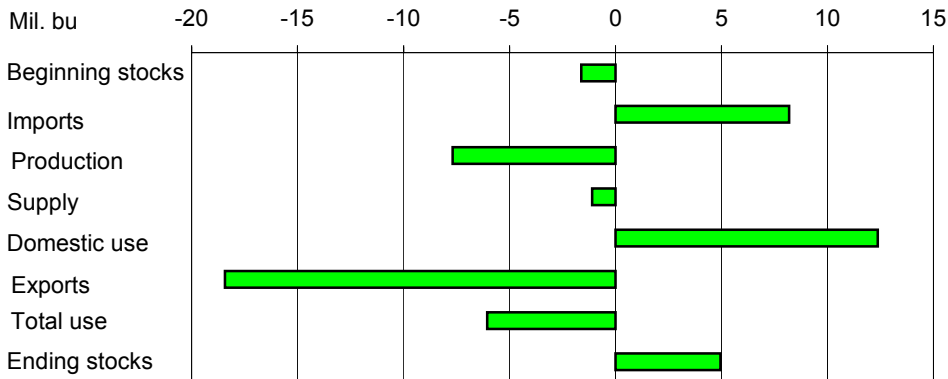
**White wheat**



Source: WASDE, USDA.

Figure 12

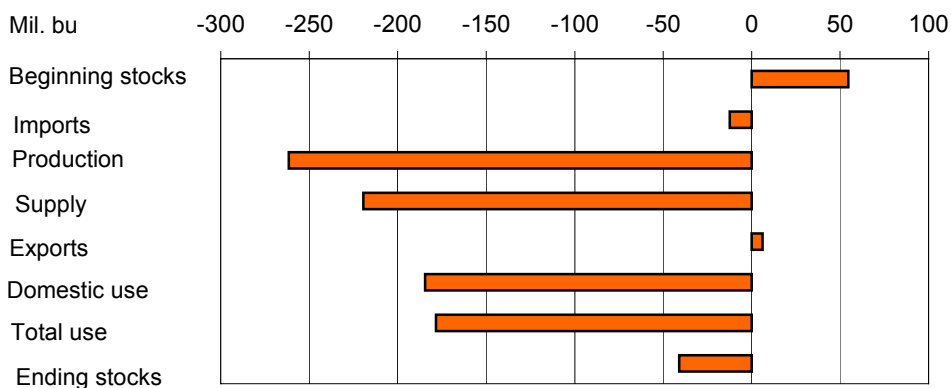
**Durum**



Source: WASDE, USDA.

Figure 13

**All wheat**



Source: WASDE, USDA.



## Contacts and Links

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To order printed copies of the five field crop newsletters—cotton and wool, feed, rice, oil crops, and wheat—as a series, specify series SUB-COR-4043.

### Data

Monthly tables from *Wheat Outlook* are available in Excel (.xls) spreadsheets at <http://www.ers.usda.gov/briefing/wheat/Data/data.htm>. These tables contain the latest data on supply and disappearance, monthly food-use estimates, prices, exports, and imports.

### Recent Report

*China's Wheat Economy: Current Trends and Prospects for Imports*. The last 10 years have been a period of volatility for wheat production and trade in China. This report provides an overview of current wheat production and consumption trends in China, including factors that contributed to slumping imports in recent years.

<http://www.ers.usda.gov/publications/whs/may04/whs04D01/>

### Related Websites

WASDE (<http://usda.mannlib.cornell.edu/reports/waobr/wasde-bb/>)

Grain Circular, [http://www.fas.usda.gov/grain\\_arc.html](http://www.fas.usda.gov/grain_arc.html)

Wheat Briefing Room, <http://www.ers.usda.gov/briefing/wheat/>

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Table 1--Wheat: U.S. market year supply and disappearance, 9/14/04

Item	1997/98	1998/99	1999/00	2000/01	2001/02	2002/03E	2003/04P	2004/05P
Area: (mil. ac)								
National total base	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Eff. base/Ctr. acres								
0,50/92,85	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
CRP base retired	10.1	9.7	0.0	0.0	0.0	0.0	0.0	0.0
Planted	70.4	65.8	62.7	62.5	59.4	60.3	61.7	59.7
Harvested	62.8	59.0	53.8	53.1	48.5	45.8	52.8	50.6
Yield: (bu/acre)	39.5	43.2	42.7	42.0	40.2	35.0	44.2	42.0
Supply:								
			Million bushels					
Beginning stocks	443.6	722.5	945.9	949.7	876.2	777.1	491.4	546.0
Production	2,481.5	2,547.3	2,295.6	2,228.2	1,947.5	1,605.9	2,336.5	2,122.9
Imports 1/	94.9	103.0	94.5	89.8	107.6	84.6	72.4	60.0
Total supply	3,020.0	3,372.8	3,336.0	3,267.7	2,931.2	2,467.6	2,900.3	2,728.9
Use:								
Food	914.1	910.0	928.8	949.6	926.4	922.7	911.3	920.0
Seed	92.5	80.4	91.7	79.5	83.4	83.8	79.8	81.0
Feed and residual	250.5	390.7	279.3	300.4	182.0	119.4	203.8	200.0
Total domestic	1,257.1	1,381.1	1,299.7	1,329.5	1,191.8	1,125.9	1,194.9	1,201.0
Exports 1/	1,040.4	1,045.7	1,086.5	1,062.0	962.3	850.2	1,159.4	950.0
Total use	2,297.5	2,426.9	2,386.2	2,391.6	2,154.1	1,976.2	2,354.3	2,151.0
Ending stocks:								
Farmer-owned reserve	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
CCC inventory 2/	94.0	128.0	104.0	97.0	99.0	66.0	61.0	60.0
Free stocks	628.5	817.9	845.7	779.2	678.1	425.4	485.0	517.9
Stocks-to-use ratio	31.4	39.0	39.8	36.6	36.1	24.9	23.2	26.9
Prices: (\$/bu)								
Target price	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Loan rate	2.58	2.58	2.58	2.58	2.58	2.80	2.80	2.75
Contract rate	0.63	0.66	0.64	0.59	0.48	0.52	0.52	0.52
Ave. farm price	3.38	2.65	2.48	2.62	2.78	3.56	3.40	3.00-3.50
Gov't. pmts.								
(mil. dollars)	1,412	2,717	3,827	3,606	2,474	1,173	1,230	1,548
Market value								
of production								
(mil. dollars)	8,287	6,781	5,594	5,782	5,414	5,717	7,944	6,899

Totals may not add due to rounding. E=Estimated, P=Projected.

1/ Imports and exports include flour and other products expressed in wheat equivalent. 2/ Includes Food Security Reserve.

Source: *World Agricultural Supply and Demand Estimates*, WAOB, USDA.

Table 2--Wheat: U.S. market year supply and disappearance, 9/14/04 1/

2003/04E	HRW	HRS	SRW	White	Durum	All wheat
Area: Million acres						
Planted	32.178	13.1	8.273	5.231	2.915	61.70
Harvested	25.443	12.7	6.809	5.001	2.869	52.84
Yield: (bu/acre)	41.8	39.3	55.7	59.6	33.7	44.20
Supply: Million bushels						
Beg. stocks	188.31	145.00	55.00	75.00	28.11	491.42
Production	1,062.89	499.93	379.20	297.88	96.64	2,336.53
Imports 2/	0.58	14.04	21.94	14.03	21.81	72.40
Total	1,251.77	658.97	456.13	386.91	146.55	2,900.34
Utilization:						
Food	375.35	223.00	153.00	85.00	74.91	911.26
Seed	34.98	19.08	15.78	6.57	3.45	79.85
Feed and residual	101.62	-10.77	83.82	31.41	-2.29	203.79
Total domestic	511.95	231.31	252.60	122.97	76.06	1,194.89
Exports 2/	512.31	271.66	139.53	191.94	44.00	1,159.45
Total	1,024.26	502.97	392.13	314.91	120.06	2,354.33
Ending stocks:	227.51	156.00	64.00	72.00	26.49	546.00
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2004/05P	HRW	HRS	SRW	White	Durum	All wheat
-----						
Area: Million acres						
Planted	30.969	12.905	8.263	4.991	2.592	59.72
Harvested	23.828	12.459	7.061	4.687	2.521	50.56
Yield: (bu/acre)	35.8	40.3	53.8	63.6	35.3	42.00
Supply: Million bushels						
Beg. stocks	227.51	156.00	64.00	72.00	26.49	546.00
Production	853.08	502.49	380.23	298.14	88.95	2,122.89
Imports 2/	1.00	9.00	12.00	8.00	30.00	60.00
Total	1,081.59	667.49	456.23	378.14	145.44	2,728.90
Utilization:						
Total domestic	481.00	265.00	255.00	116.00	84.00	1,201.00
Exports 2/	350.00	240.00	150.00	180.00	30.00	950.00
Total	831.00	505.00	405.00	296.00	114.00	2,151.00
Ending stocks:	250.59	162.49	51.23	82.14	31.44	577.90

Totals may not add due to rounding. E=Estimated, P=Projected. 1/ ERS estimates of area, yield, and domestic use. 2/ Imports and exports include flour and other products expressed in wheat equivalent.

Source: *World Agricultural Supply and Demand Estimates*, WAOB, USDA.

Table 3--Wheat: Quarterly supply and disappearance (1,000 bu), 9/14/04

Market year	Production	Imports 1/	Supply	Food	Seed	Feed	Exports 1/	Ending stocks	
Million bushels									
1998/99									
	Jun-Aug	2,547	24	3,294	226	1	425	257	2,385
	Sep-Nov	---	24	2,409	241	55	-74	292	1,896
	Dec-Feb	---	28	1,923	213	1	7	251	1,450
	Mar-May	---	27	1,477	230	23	32	246	946
	Mkt. year	2,547	103	3,373	910	80	391	1,046	946
1999/00									
	Jun-Aug	2,296	31	3,272	230	6	269	322	2,445
	Sep-Nov	---	19	2,465	241	55	-5	290	1,884
	Dec-Feb	---	19	1,903	223	2	26	236	1,417
	Mar-May	---	25	1,442	235	28	-10	239	950
	Mkt. year	2,296	95	3,336	929	92	279	1,086	950
2000/01									
	Jun-Aug	2,228	20	3,198	239	1	318	288	2,353
	Sep-Nov	---	25	2,378	253	50	-24	293	1,806
	Dec-Feb	---	21	1,828	228	3	11	246	1,338
	Mar-May	---	23	1,361	230	25	-4	235	876
	Mkt. year	2,228	90	3,268	950	79	300	1,062	876
2001/02:									
	Jun-Aug	1,947	26	2,849	234	3	238	218	2,156
	Sep-Nov	---	29	2,185	245	52	-23	288	1,623
	Dec-Feb	---	28	1,651	221	2	-7	225	1,210
	Mar-May	---	25	1,235	226	26	-26	231	777
	Mkt. year	1,947	108	2,931	926	83	182	962	777
2002/03 E:									
	Jun-Aug	1,606	27	2,410	233	3	185	240	1,749
	Sep-Nov	---	23	1,772	238	54	-74	235	1,320
	Dec-Feb	---	16	1,336	219	3	17	190	907
	Mar-May	---	19	926	233	24	-8	186	491
	Mkt. year	1,606	85	2,468	923	84	119	850	491
2003/04 P:									
	Jun-Aug	2,337	19	2,847	233	2	308	265	2,039
	Sep-Nov	---	23	2,062	242	53	-59	305	1,520
	Dec-Feb	---	14	1,534	214	2	5	293	1,021
	Mar-May	---	17	1,037	223	22	-50	297	546
	Mkt. year	2,337	72	2,900	911	80	204	1,159	546

Totals might not add due to rounding. E=Estimated, P=Projected. 1/ Imports and exports include flour and selected products expressed in wheat equivalent.

Source: *World Agricultural Supply and Demand Estimates*, WAOB, USDA.

Table 4--Monthly food use estimates for last 12 months (1,000 bu), 9/14/04

Item		July	Aug.	Sept.	Oct.	Nov.	Dec.
Mill grind	+	73,737	80,589	77,493	78,508	75,144	70,534
Food imports 1/	+	3,291	2,945	2,758	3,052	2,758	2,868
Non-flour							
food use 2/	+	2,000	2,000	2,000	2,000	2,000	2,000
Food exports 1/	-	1,408	4,550	1,558	1,250	1,153	2,540
Food use	=	77,620	80,984	80,693	82,310	78,749	72,862
Item		Jan.	Feb.	Mar.	Apr.	May	June
Mill grind	+	69,257	68,707	72,895	70,626	72,212	69,089
Food imports 1/	+	2,096	1,988	2,311	2,102	1,943	3,098
Non-flour							
food use 2/	+	2,000	2,000	2,000	2,000	2,000	2,000
Food exports 1/	-	3,117	1,964	1,806	1,155	2,243	1,188
Food use	=	70,236	70,731	75,400	73,573	73,912	72,999

1/ Wheat flour and flour products converted to wheat grain equivalent. 2/ ERS estimate of cereal use.

Totals may not add due to rounding.

Source: Economic Research Service, USDA.

Table 5--Wheat: National average price received by farmers, 9/14/04 1/

Month	All wheat		Winter		Durum		Other spring	
	03/04	04/05	03/04	04/05	03/04	04/05	03/04	04/05
				(\$/bu)				
June	3.08	3.57	2.94	3.47	3.99	4.40	3.45	3.83
July	2.95	3.37	2.89	3.32	3.85	4.11	3.31	3.24
August	3.35	3.13	3.28	3.02	3.78	3.83	3.42	
September	3.39		3.31		3.95		3.42	
October	3.44		3.37		3.89		3.53	
November	3.61		3.56		3.95		3.68	
December	3.68		3.62		3.95		3.72	
January	3.68		3.66		3.96		3.67	
February	3.77		3.67		4.08		3.84	
March	3.83		3.76		4.14		3.90	
April	3.88		3.79		4.19		3.94	
May	3.82		3.72		4.21		4.01	

1/ Preliminary mid-month weighted average price for current month.

Source: *Agricultural Prices*, National Agricultural Statistics Service, USDA.

Table 6--Wheat prices received by farmers by class, 9/14/04

Month	Hard red winter		Soft red winter		Hard red spring		Soft white	
	03/04	04/05	03/04	04/05	03/04	04/05	03/04	04/05
				(\$/bu)				
June	2.88	3.48	3.07	3.41	3.46	3.87	3.24	3.81
July	2.82	3.35	3.02	3.24	3.31	3.55	3.20	3.46
August	3.25		3.28		3.43		3.42	
September	3.23		3.34		3.42		3.45	
October	3.36		3.27		3.54		3.42	
November	3.56		3.61		3.70		3.54	
December	3.64		3.77		3.73		3.53	
January	3.66		3.69		3.68		3.63	
February	3.64		3.70		3.85		3.73	
March	3.74		3.80		3.91		3.81	
April	3.76		3.84		3.94		3.89	
May	3.67		3.81		4.02		3.93	

Source: *Agricultural Prices*, National Agricultural Statistics Service, USDA.

Table 7--Wheat: Average cash grain bids at selected markets (\$/bu), 9/14/04

Month	KC HRW #1 ordinary		KC HRW #1 13% protein		Portland #1 HRW Ord.		FOB Gulf \$/mt (#2 HRW)	
	03/04	04/05	03/04	04/05	03/04	04/05	03/04	04/05
	June	3.63	4.13	3.74	4.35	3.76	4.11	130.93
July	3.34	3.97	3.66	4.07	3.47	3.72	130.87	151.86
August	3.87		4.02		4.04		151.10	
September	3.74		3.85		4.05		146.92	
October	3.79		3.40		4.02		148.64	
November	4.21		4.39		4.53		163.04	
December	4.31		4.40		4.61		166.82	
January	4.32		4.37		4.47		165.99	
February	4.25		4.36		4.47		162.93	
March	4.30		4.44		4.47		167.89	
April	4.35		4.48		4.58		167.85	
May	4.28		4.51		4.37		163.60	

Month	Minneapolis DNS 13% protein		Minneapolis DNS 14% protein		Minneapolis #1 HAD milling		Portland DNS 14% protein	
	03/04	04/05	03/04	04/05	03/04	04/05	03/04	04/05
	June	4.11	4.35	4.12	4.56	N/Q	N/Q	4.48
July	3.88	4.08	4.00	4.31	N/Q	N/Q	4.31	4.27
August	4.04		4.15		5.30		4.60	
September	3.83		4.03		N/Q		4.51	
October	4.12		4.31		N/Q		4.55	
November	4.37		4.59		N/Q		4.91	
December	4.24		4.43		N/Q		4.97	
January	4.30		4.44		N/Q		5.06	
February	4.44		4.64		5.30		5.11	
March	4.33		4.63		5.33		5.10	
April	4.51		4.69		N/Q		5.13	
May	4.54		4.69		N/Q		5.05	

Month	St. Louis #2 soft red		Chicago #2 soft red		Toledo #2 soft red		Portland #1 soft white	
	03/04	04/05	03/04	04/05	03/04	04/05	03/04	04/05
	June	3.46	3.51	3.11	3.46	3.12	3.49	3.47
July	3.29	3.21	3.23	3.26	3.17	3.25	3.56	3.94
August	3.56		3.63		3.50		3.90	
September	3.43		3.46		3.33		3.85	
October	N/Q		3.42		3.31		3.70	
November	4.19		3.87		3.73		3.98	
December	3.99		3.92		3.79		4.05	
January	3.98		3.90		3.85		4.11	
February	3.94		3.84		3.79		4.14	
March	4.02		3.85		3.83		4.20	
April	3.88		3.92		3.92		4.29	
May	3.64		3.73		3.71		4.18	

N/Q=no quote. Source: *Grain and Feed Weekly Summary and Statistics*, AMS, USDA.

Table 8--Wheat: U.S. exports and imports for last 6 months, 9/14/04 1/

Exports, (1,000 bu)						
Item 1/	Jan.	Feb.	Mar.	Apr.	May	June
Wheat grain	109,607	94,480	96,685	102,588	91,917	80,599
Wheat flour	1,789	1,342	1,020	732	1,386	742
Products	1,347	783	795	533	980	478
Total	112,743	96,605	98,500	103,853	94,283	81,819
Imports, (1,000 bu.)						
Item 1/	Jan.	Feb.	Mar.	Apr.	May	June
Wheat grain	2,146	2,444	3,564	3,259	3,475	2,631
Wheat flour	964	910	1,045	888	898	897
Products	1,135	1,080	1,275	1,223	1,051	1,209
Total	4,245	4,434	5,884	5,370	5,424	4,737

Source: Economic Research Service, USDA. 1/ Wheat flour and products converted to wheat grain equivalent. Totals may not add due to rounding.

Table 9--Wheat: U.S. exports, Census and export sales comparison, 9/14/04 1/

Importing country	2002/03		2003/04		2004/05 (as of 9/2/04)		
	Shipments				Shipments	Outstanding sales	Total
	Data source	Census	Export sales	Census	Export sales	Export sales	
1,000 metric tons							
Country:							
Egypt	1,085	1,107	4,022	3,942	441	325	766
Japan	3,076	2,998	3,132	3,139	824	513	1,338
Mexico	2,392	2,486	2,814	2,863	618	465	1,083
Nigeria	1,666	1,660	2,192	2,221	673	335	1,007
EU	1,127	1,236	1,617	2,052	321	143	464
South Korea	1,202	1,257	1,478	1,329	336	338	674
China	78	80	1,138	1,166	1,012	907	1,919
Philippines	1,524	1,560	1,119	1,139	406	276	682
Taiwan	919	958	1,016	1,066	173	131	304
Peru	403	449	905	914	348	55	402
Total grain	22,396	20,805	30,771	29,599	7,325	5,488	12,813
Total (including products)	23,242	20,840		29,663	7,350	5,502	12,852
USDA forecast of Census					25,855		

1/ Export sales and shipments from USDA's weekly *U.S. Export Sales* report.

Source: *U.S. Export Sales*, FAS.