

Foreword

The Agricultural Outlook 2013-2022 is a collaborative effort of the Organisation for Economic Co-operation and Development (OECD) and the Food and Agriculture Organization (FAO) of the United Nations. It brings together the commodity, policy and country expertise of both organisations and input from collaborating member countries to provide an annual assessment of prospects for the coming decade of national, regional and global agricultural commodity markets. This year's edition contains for the first time a chapter on world cotton markets. Chapter 2 has been prepared with assistance from the Agricultural Information Institute (AII) of the Chinese Academy of Agricultural Sciences and the Ministry of Agriculture (MoA) of the Government of China. However, responsibility for the information and projections contained in this document remain those of the OECD and FAO, and do not necessarily reflect the views of the AII or of the MoA.

The baseline projection is not a forecast about the future, but rather a plausible scenario elaborated on the basis of specific assumptions regarding the macroeconomic conditions, the agriculture and trade policy settings, weather conditions, longer term productivity trends and international market developments. The projections of production, consumption, stocks, trade and prices for the different agricultural products described and analysed in this report cover the years 2013 to 2022. The evolution of markets over the outlook period is typically described using the annual growth rate or percentage changes for the final year 2022 relative to a three-year base period of 2010-12.

The individual commodity projections are subject to critical examination by national country experts of OECD, other collaborating countries and industry experts prior to their finalisation and publication in this report. The risks and uncertainties around the baseline projections are examined through a number of possible alternative scenarios and stochastic analysis, which illustrate how market outcomes may differ from the deterministic baseline projections.

The fully documented outlook database, including historical data and projections, is available through the OECD-FAO joint internet site www.agri-outlook.org.

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