Foreword

The *Agricultural Outlook 2023-2032* 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.

The *Agricultural Outlook* is prepared jointly by the OECD and FAO Secretariats.

At the OECD, the baseline projections and *Outlook* report were prepared by members of the Trade and Agriculture Directorate: Marcel Adenäuer, Annelies Deuss, Armelle Elasri (publication co-ordinator), Hubertus Gay (*Outlook* co-ordinator), Céline Giner, Gaëlle Gouarin, Tomoo Higuchi, Lee Ann Jackson (Head of Division), Edith Laget, Claude Nénert, Daniela Rodriguez Niño, and Grégoire Tallard of the Agro-Food Trade and Markets Division, and for fish and seafood by Claire Delpeuch and Will Symes of the Agricultural Resources Policy Division. The partial stochastic modelling builds on work by the Economics of Agriculture Unit of the European Commission's Joint Research Centre. The organisation of meetings and publication preparation were provided by Caitlin Boros, Edmund Linton, Catalina Mas, and Michèle Patterson. Wilfrid Legg provided language review for the publication. Technical assistance in the preparation of the *Outlook* database was provided by Karine Lepron, Marc Regnier and Eric Espinasse. Many other colleagues in the OECD Secretariat and member country delegations provided useful comments on earlier drafts of the report.

At the Food and Agriculture Organization of the United Nations, the baseline projections and Outlook report were prepared by members of the Markets and Trade Division (EST) under the leadership of Boubaker Ben-Belhassen (EST Division Director), with the overall guidance of Máximo Torero (FAO Chief Economist) and by the Economic and Social Development Stream Management team. The core projections team consisted of: Sabine Altendorf, Sergio René Araujo Enciso, Giulia Caddeo, André Croppenstedt, Holger Matthey (Team Leader), Svetlana Mladenovic, Sabina Tuspayeva and Irmak Yaka. For fish, the team consisted of Pierre Charlebois, Adrienne Egger, and Stefania Vannuccini from the FAO Fisheries and Aquaculture Division. Advice on fishmeal and fish oil issues and historical data were provided by Enrico Bachis from the Marine Ingredients Organisation (IFFO). Macroeconomic projections benefited from the input by Oxford Economics. The sugar and cotton sections were contributed by Mamoun Amrouk and Fabio Palmeri, with data and technical advice by Lorena Ruiz from the International Cotton Advisory Committee(ICAC). The section on bananas and major tropical fruits was prepared by Sabine Altendorf, Giuseppe Bonavita and Pascal Liu. Carola Fabi, Salar Tayyib and Francesco Tubiello advised on FAOSTAT data. Commodity expertise was provided by Erin Collier, Shirley Mustafa, G.A. Upali Wickramasinghe, and Di Yang. Marion Delport and Jodie Hattingh from the Bureau for Food and Agricultural Policy (BFAP) contributed material and expertise to Box 1.1. Research assistance and database preparation were provided by David Bedford, Harout Dekermendjian, Annamaria Giusti, Grace Maria Karumathy, Yanyun Li, Lavinia Lucarelli, Emanuele Marocco, and Marco Milo. This edition also benefited from comments made by various colleagues from FAO and member country institutions. The

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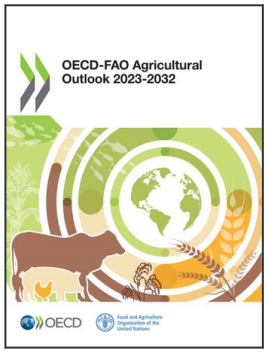
The complete *Agricultural Outlook*, including the fully documented *Outlook* database that includes historical data and projections, can be accessed through the OECD-FAO joint internet site: www.agri-outlook.org.

The published *Agricultural Outlook 2023-2032* is available in the OECD's iLibrary and FAO Document Repository.



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