

PART IV

Non-Member Economies

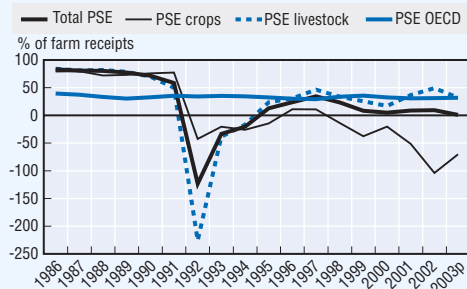
*This part of the report provides detailed information on the development of the level and composition of support to agriculture in two non member economies – **Russia** and **Ukraine**, for which the PSE/CSE/TSE estimates are available until 2003. The information is provided in the same format as for the OECD countries in Part II of the report. However, Part I of the report, only evaluates support policies in OECD countries.*

Russia

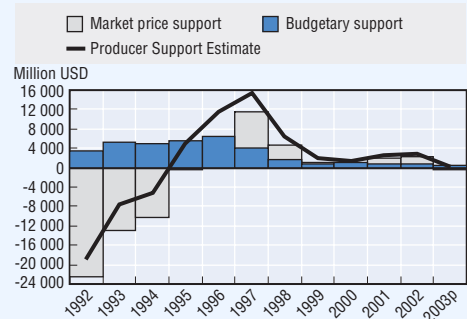
Developments in Russia's agricultural policies in 2003 were driven by two main objectives: to stimulate livestock production and to protect consumers against price hikes for grains on domestic markets. In particular, TRQs on meat imports from other than NIS countries were introduced in 2003 and sanitary control of meat imports tightened.

- Support to producers (% PSE), fell dramatically between the 1986-88 and 2001-2003 from 81% to 6%, and is less than one fifth of the OECD average. However, the level of support differs between implicit taxation of crop products at 75% and a strong support for livestock products at 39%.
- The combined share of market price support, output and input payments remained at 100% of producer support. While prices received by farmers in 1986-88 were more than five-fold higher than those on the world market, in 2001-2003 they were, on average, at the parity level.
- Taxation of consumers, (% CSE), fell from 69% in 1986-88 to 13% in 2001-2003.
- The share of support for general services provided to agriculture increased between 1986-88 and 2001-2003, from 3% to 24% of total support. Total support to agriculture as a percentage of GDP is low at 0.7%.

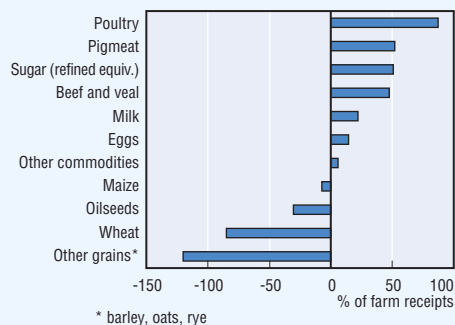
Producer Support Estimate (PSE) Level...



... composition over time...



... and by commodity, 2001-2003 average



Overall, although Russia's level of support fell dramatically, it continues to be based on production and trade distorting instruments. The strong differentiation of the level of support across commodities indicates serious resource misallocations. Reforms are necessary to improve the functioning of the markets and enhance the market orientation of the sector.

Table IV.1. **Russia: Estimates of support to agriculture**

(RUR million)

	1986-88	2001-2003	2001	2002	2003p
Total value of production (at farm gate)	105 954	899 019	834 626	931 568	930 863
<i>of which share of MPS commodities (%)</i>	<i>79</i>	<i>63</i>	<i>65</i>	<i>62</i>	<i>63</i>
Total value of consumption (at farm gate)	127 490	1 112 037	1 016 022	1 156 771	1 163 317
Producer Support Estimate (PSE)	117 275	57 437	74 280	89 573	8 460
Market Price Support (MPS)	79 086	37 853	53 645	69 237	-9 323
<i>of which MPS commodities</i>	<i>62 674</i>	<i>23 830</i>	<i>34 633</i>	<i>42 738</i>	<i>-5 881</i>
Payments based on output	950	4 731	4 758	4 363	5 072
Payments based on area planted/animal numbers	0	0	0	0	0
Payments based on historical entitlements	0	0	0	0	0
Payments based on input use	35 577	14 854	15 877	15 973	12 711
Payments based on input constraints	0	0	0	0	0
Payments based on overall farming income	0	0	0	0	0
Miscellaneous payments	1 662	0	0	0	0
Percentage PSE	81	6	9	9	1
Producer NPC	5.47	0.96	1.00	0.96	0.90
Producer NAC	5.41	1.07	1.10	1.10	1.01
General Services Support Estimate (GSSE)	4 414	17 735	12 765	19 143	21 296
Research and development	765	1 486	1 176	1 582	1 700
Agricultural schools	424	5 182	3 748	5 345	6 454
Inspection services	255	4 929	2 691	5 080	7 015
Infrastructure	1 268	2 444	1 326	2 520	3 485
Marketing and promotion	0	0	0	0	0
Public stockholding	0	0	0	0	0
Miscellaneous	1 703	3 694	3 824	4 616	2 642
GSSE as a share of TSE (%)	2.8	23.6	14.7	17.6	71.6
Consumer Support Estimate (CSE)	-63 983	-142 644	-164 556	-207 041	-56 335
Transfers to producers from consumers	-85 963	20 242	-28 169	-9 208	98 102
Other transfers from consumers	-18 073	-107 619	-99 894	-130 096	-92 866
Transfers to consumers from taxpayers	34 468	0	0	0	0
Excess feed cost	5 585	-55 267	-36 493	-67 737	-61 572
Percentage CSE	-69	-13	-16	-18	-5
Consumer NPC	5.52	1.09	1.14	1.14	1.00
Consumer NAC	3.23	1.15	1.19	1.22	1.05
Total Support Estimate (TSE)	156 157	75 172	87 044	108 716	29 756
Transfers from consumers	104 036	87 377	128 063	139 304	-5 236
Transfers from taxpayers	70 194	95 414	58 875	99 509	127 858
Budget revenues	-18 073	-107 619	-99 894	-130 096	-92 866
Percentage TSE (expressed as share of GDP)	<i>n.c.</i>	0.68	0.96	1.00	0.22

p: provisional.

Market price support is net of producer levies and excess feed costs.

MPS commodities for Russia are: wheat, maize, other grains, oilseeds, sugar, milk, beef and veal, pigmeat, poultry and eggs.

NPC: Nominal Protection Coefficient. NAC: Nominal Assistance Coefficient.

Source: OECD, PSE/CSE database 2004.

Table IV.2. **Russia: Main indicators by commodity**

		1986-88	2001-2003	2001	2002	2003p
Wheat	PSE (RUR mn)	5 150	-69 778	-54 382	-95 187	-59 766
	Percentage PSE	71	-85	-59	-125	-71
	Producer NPC	2.52	0.54	0.61	0.43	0.57
	Producer NAC	3.52	0.55	0.63	0.45	0.58
	Percentage CSE	-2	56	40	79	49
	Consumer NPC	2.52	0.54	0.61	0.43	0.57
	Consumer NAC	1.03	0.65	0.71	0.56	0.67
Maize	PSE (RUR mn)	1 190	-633	934	-1 230	-1 603
	Percentage PSE	88	-7	26	-25	-23
	Producer NPC	5.90	0.96	1.32	0.78	0.80
	Producer NAC	8.18	0.99	1.35	0.80	0.82
	Percentage CSE	-54	1	-9	8	4
	Consumer NPC	5.90	0.96	1.32	0.78	0.80
	Consumer NAC	2.50	1.00	1.10	0.93	0.96
Other grains	PSE (RUR mn)	6 623	-55 243	-41 171	-69 069	-55 488
	Percentage PSE	75	-120	-75	-173	-113
	Producer NPC	2.96	0.46	0.56	0.36	0.46
	Producer NAC	4.14	0.47	0.57	0.37	0.47
	Percentage CSE	-1	51	29	76	46
	Consumer NPC	3.01	0.46	0.57	0.35	0.46
	Consumer NAC	1.01	0.68	0.78	0.57	0.68
Oilseeds	PSE (RUR mn)	998	-6 971	-97	-320	-20 498
	Percentage PSE	75	-30	-1	-2	-88
	Producer NPC	2.98	0.82	0.97	0.96	0.52
	Producer NAC	4.16	0.83	0.99	0.98	0.53
	Percentage CSE	27	33	3	4	91
	Consumer NPC	2.98	0.82	0.97	0.96	0.52
	Consumer NAC	1.25	0.82	0.97	0.96	0.52
Sugar	PSE (RUR mn)	2 809	7 621	5 205	7 635	10 023
	Percentage PSE	92	51	44	53	56
	Producer NPC	9.09	2.03	1.74	2.10	2.25
	Producer NAC	12.69	2.06	1.77	2.13	2.28
	Percentage CSE	-81	-50	-42	-52	-56
	Consumer NPC	9.09	2.03	1.74	2.10	2.25
	Consumer NAC	5.41	2.03	1.74	2.10	2.25
Milk	PSE (RUR mn)	33 797	37 225	13 410	56 798	41 467
	Percentage PSE	89	22	10	32	24
	Producer NPC	10.05	1.15	1.01	1.28	1.17
	Producer NAC	8.85	1.30	1.11	1.48	1.32
	Percentage CSE	-84	-11	0	-21	-13
	Consumer NPC	10.05	1.14	1.00	1.26	1.15
	Consumer NAC	6.43	1.14	1.00	1.26	1.15
Beef and veal	PSE (RUR mn)	21 866	40 384	45 593	51 322	24 237
	Percentage PSE	83	47	55	57	31
	Producer NPC	6.23	1.64	1.91	1.80	1.22
	Producer NAC	5.91	1.99	2.22	2.30	1.45
	Percentage CSE	-72	-36	-47	-44	-17
	Consumer NPC	6.04	1.63	1.90	1.79	1.21
	Consumer NAC	3.74	1.63	1.90	1.79	1.21

Table IV.2. **Russia: Main indicators by commodity (cont.)**

		1986-88	2001-2003	2001	2002	2003p
Pigmeat	PSE (RUR mn)	10 118	38 807	36 219	49 804	30 398
	Percentage PSE	72	52	49	64	43
	Producer NPC	4.83	1.45	1.52	1.62	1.20
	Producer NAC	3.55	2.16	1.98	2.76	1.75
	Percentage CSE	-68	-29	-34	-38	-17
	Consumer NPC	4.70	1.44	1.51	1.61	1.20
	Consumer NAC	3.14	1.44	1.51	1.61	1.20
Poultry	PSE (RUR mn)	5 552	39 530	30 901	41 090	46 600
	Percentage PSE	80	87	79	94	88
	Producer NPC	5.54	3.20	2.76	3.42	3.42
	Producer NAC	5.01	10.18	4.87	17.14	8.52
	Percentage CSE	-63	-68	-63	-71	-70
	Consumer NPC	5.38	3.17	2.72	3.39	3.39
	Consumer NAC	2.69	3.17	2.72	3.39	3.39
Eggs	PSE (RUR mn)	4 556	6 670	13 161	14 912	-8 063
	Percentage PSE	71	14	29	31	-17
	Producer NPC	4.31	0.98	1.16	1.08	0.72
	Producer NAC	3.43	1.24	1.41	1.46	0.85
	Percentage CSE	-76	7	-13	-6	41
	Consumer NPC	4.31	0.98	1.15	1.07	0.71
	Consumer NAC	4.31	0.98	1.15	1.07	0.71
Other commodities	PSE (RUR mn)	24 616	19 826	24 508	33 818	1 154
	Percentage PSE	82	6	8	9	0
	Producer NPC	5.43	0.95	1.00	0.96	0.90
	Producer NAC	5.46	1.06	1.09	1.10	1.00
	Percentage CSE	-81	-8	-13	-12	0
	Consumer NPC	5.52	1.09	1.14	1.14	1.00
	Consumer NAC	5.32	1.09	1.14	1.14	1.00
All commodities	PSE (RUR mn)	117 275	57 437	74 280	89 573	8 460
	Percentage PSE	81	6	9	9	1
	Producer NPC	5.47	0.96	1.00	0.96	0.90
	Producer NAC	5.41	1.07	1.10	1.10	1.01
	Percentage CSE	-69	-13	-16	-18	-5
	Consumer NPC	5.52	1.09	1.14	1.14	1.00
	Consumer NAC	3.23	1.15	1.19	1.22	1.05

p: provisional; n.c.: not calculated.

PSE: Producer Support Estimate. CSE: Consumer Support estimate. NPC: Nominal Protection Coefficient. NAC: Nominal Assistance Coefficient.

The PSE/CSE for "other commodities" is the residual of the PSE/CSE for all commodities minus the PSE/CSE for the commodities listed above.

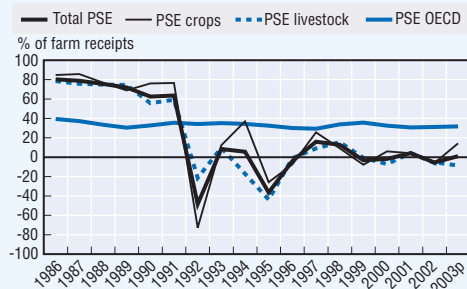
Source: OECD, PSE/CSE database 2004.

Ukraine

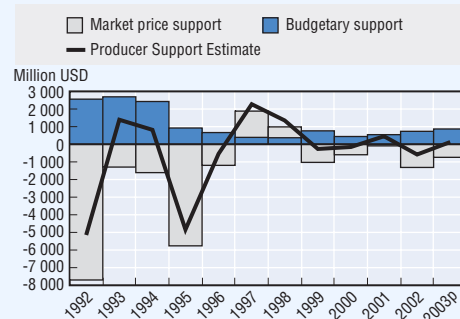
The sector was affected by very bad weather in 2003 with grain production almost halved. Emergency measures dominated in 2003, targeted to halt bread price rises (grain and bread price controls, state grain imports, grain reserve purchases at regional level). Producers affected by the disaster received *ad hoc* per hectare payments. Extra funds were allocated for subsidising short-term interest rates. Elimination of per tonne payments for meat and milk, scheduled for 2004, was postponed.

- Support to producers (% PSE), fell from 78% in 1986-88 to a zero level in 2001-03. The average low level of % PSE disguises significant variations across commodities ranging from 44% for poultry to minus 26% for milk in 2001-03.
- In 2001-03 producers received prices at 94% of the world levels, indicating a dramatic change from the pre-transition period when domestic prices were 6-fold those on the world market.
- Market Price Support has been generally the most important but strongly fluctuating component of total producer support. Budgetary support remains dominated by output and input-based payments, comprising 93% of its total in 2001-03.
- Consumer support (% CSE) switched from an implicit taxation at 65% in the pre-transition period (1986-88), to an implicit consumer subsidy of 4% in 2001-03.
- Support for general services to agriculture equalled 98% of total support in 2001-03, compared to 4% in 1986-88. The rise in this share is mainly the effect of the reduced producer support. Total support to Ukrainian agriculture comprised only 0.3% of GDP in 2001-03.

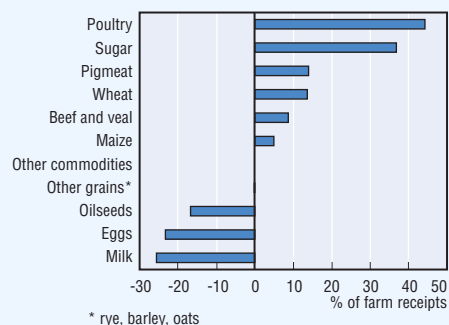
Producer Support Estimate (PSE) Level...



... composition over time...



... and by commodity, 2001-2003 average



Although the overall % PSE has sharply declined over the transition period, production and trade distorting instruments, prevail in the policy mix (MPS, output and input payments). Overall, the producer prices are implicitly taxed, while budgetary support is provided through output and inputs subsidies. The high variations of support across commodities indicate serious resource misallocations.

Table IV.3. **Ukraine: Estimates of support to agriculture**

(LC million)

	1986-88	2001-2003	2001	2002	2003p
Total value of production (at farm gate)	35 745	55 475	55 696	52 095	58 636
<i>of which share of MPS commodities (%)</i>	<i>78</i>	<i>68</i>	<i>73</i>	<i>68</i>	<i>63</i>
Total value of consumption (at farm gate)	35 556	52 175	48 391	47 147	60 988
Producer Support Estimate (PSE)	35 840	10	2 429	-3 079	679
Market Price Support (MPS)	25 773	-3 814	-493	-6 987	-3 962
<i>of which MPS commodities</i>	<i>20 186</i>	<i>-2 531</i>	<i>-358</i>	<i>-4 750</i>	<i>-2 485</i>
Payments based on output	3 250	614	634	671	536
Payments based on area planted/animal numbers	0	120	0	0	360
Payments based on historical entitlements	0	0	0	0	0
Payments based on input use	6 817	2 924	2 107	3 043	3 621
Payments based on input constraints	0	0	0	0	0
Payments based on overall farming income	0	0	0	0	0
Miscellaneous payments	0	166	181	194	123
Percentage PSE	78	0	4	-5	1
Producer NPC	6.06	0.94	0.99	0.88	0.95
Producer NAC	4.63	1.00	1.04	0.95	1.01
General Services Support Estimate (GSSE)	1 684	657	578	700	693
Research and development	334	130	81	140	168
Agricultural schools	183	221	180	215	268
Inspection services	123	59	50	52	74
Infrastructure	309	179	232	254	50
Marketing and promotion	0	5	8	3	4
Public stockholding	0	16	0	10	39
Miscellaneous	735	48	26	27	90
GSSE as a share of TSE (%)	3.7	98.5	19.2	-29.4	50.5
Consumer Support Estimate (CSE)	-17 619	2 026	-247	5 264	1 062
Transfers to producers from consumers	-27 549	3 213	308	6 352	2 979
Other transfers from consumers	-1 208	-1 006	-193	-566	-2 261
Transfers to consumers from taxpayers	8 573	0	0	0	0
Excess feed cost	2 565	-180	-362	-523	344
Percentage CSE	-65	4	-1	11	2
Consumer NPC	5.47	0.96	1.00	0.89	0.99
Consumer NAC	2.93	0.96	1.01	0.90	0.98
Total Support Estimate (TSE)	46 098	667	3 007	-2 379	1 372
Transfers from consumers	28 757	-2 206	-115	-5 786	-718
Transfers from taxpayers	18 549	3 879	3 315	3 973	4 351
Budget revenues	-1 208	-1 006	-193	-566	-2 261
Percentage TSE (expressed as share of GDP)	n.c.	0.29	1.47	-1.08	0.52

p: provisional. LC : Local currency: for 1986-1988 USSR Rubles, for 2001-2003 Ukrainian Hryvnias.

Market price support is net of producer levies and excess feed costs.

MPS commodities for Ukraine are: wheat, maize, other grains, oilseeds, sugar, milk, beef and veal, pigmeat, poultry and eggs.

NPC: Nominal Protection Coefficient. NAC: Nominal Assistance Coefficient.

Source: OECD, PSE/CSE database 2004.

Table IV.4. **Ukraine: Main indicators by commodity**

		1986-88	2001-2003	2001	2002	2003p
Wheat	PSE (LC mn)	1 810	370	274	-193	1 030
	Percentage PSE	70	14	3	-3	41
	Producer NPC	2.82	1.13	0.99	0.90	1.51
	Producer NAC	3.41	1.23	1.03	0.97	1.68
	Percentage CSE	30	-7	1	9	-32
	Consumer NPC	2.82	1.13	0.99	0.90	1.51
	Consumer NAC	0.86	1.12	0.99	0.92	1.46
Maize	PSE (LC mn)	2 087	182	-10	14	541
	Percentage PSE	87	5	-1	1	15
	Producer NPC	6.53	0.98	0.95	0.93	1.05
	Producer NAC	7.92	1.06	0.99	1.01	1.17
	Percentage CSE	-21	1	2	1	-1
	Consumer NPC	6.53	0.98	0.95	0.93	1.05
	Consumer NAC	1.27	0.99	0.99	0.99	1.01
Other grains	PSE (LC mn)	1 424	9	-279	-484	789
	Percentage PSE	83	0	-6	-12	17
	Producer NPC	6.28	0.94	0.90	0.83	1.09
	Producer NAC	7.71	1.02	0.95	0.89	1.21
	Percentage CSE	-21	-1	0	6	-9
	Consumer NPC	6.08	0.96	0.91	0.84	1.13
	Consumer NAC	1.26	1.01	1.00	0.94	1.09
Oilseeds	PSE (LC mn)	945	-603	171	-1 115	-864
	Percentage PSE	84	-17	9	-37	-22
	Producer NPC	5.77	0.83	1.06	0.67	0.76
	Producer NAC	6.97	0.88	1.10	0.73	0.82
	Percentage CSE	-79	25	-5	48	31
	Consumer NPC	5.50	0.83	1.06	0.67	0.76
	Consumer NAC	5.50	0.83	1.06	0.67	0.76
Sugar	PSE (LC mn)	2 091	763	671	732	886
	Percentage PSE	91	37	30	37	44
	Producer NPC	8.86	1.50	1.36	1.48	1.65
	Producer NAC	10.56	1.60	1.42	1.59	1.78
	Percentage CSE	-88	-33	-27	-32	-40
	Consumer NPC	8.27	1.50	1.36	1.48	1.65
	Consumer NAC	8.27	1.50	1.36	1.48	1.65
Milk	PSE (LC mn)	7 258	-2 267	-2 576	-2 673	-1 552
	Percentage PSE	78	-26	-29	-32	-15
	Producer NPC	5.80	0.77	0.75	0.73	0.85
	Producer NAC	4.71	0.80	0.78	0.75	0.87
	Percentage CSE	-65	35	39	44	22
	Consumer NPC	5.18	0.75	0.72	0.70	0.82
	Consumer NAC	3.06	0.75	0.72	0.70	0.82
Beef and veal	PSE (LC mn)	7 394	394	681	9	491
	Percentage PSE	88	9	14	0	11
	Producer NPC	-18.91	1.06	1.12	0.95	1.10
	Producer NAC	8.84	1.10	1.17	1.00	1.13
	Percentage CSE	-91	0	-5	12	-6
	Consumer NPC	-16.91	1.00	1.05	0.89	1.07
	Consumer NAC	-9.41	1.00	1.05	0.89	1.07

Table IV.4. **Ukraine: Main indicators by commodity (cont.)**

		1986-88	2001-2003	2001	2002	2003p
Pigmeat	PSE (LC mn)	2 507	798	1 915	907	-428
	Percentage PSE	62	14	33	20	-12
	Producer NPC	3.88	1.15	1.41	1.16	0.88
	Producer NAC	2.65	1.22	1.50	1.26	0.89
	Percentage CSE	-56	-8	-29	-12	17
	Consumer NPC	3.64	1.13	1.41	1.14	0.86
	Consumer NAC	2.30	1.13	1.41	1.14	0.86
Poultry	PSE (LC mn)	1 349	920	665	1 036	1 059
	Percentage PSE	66	44	35	54	43
	Producer NPC	4.79	1.72	1.45	1.94	1.76
	Producer NAC	2.93	1.83	1.55	2.18	1.76
	Percentage CSE	-78	-40	-31	-47	-43
	Consumer NPC	4.64	1.69	1.45	1.88	1.74
	Consumer NAC	4.64	1.69	1.45	1.88	1.74
Eggs	PSE (LC mn)	963	-544	266	-356	-1 543
	Percentage PSE	55	-23	12	-17	-65
	Producer NPC	3.64	0.81	1.07	0.77	0.58
	Producer NAC	2.21	0.87	1.14	0.85	0.61
	Percentage CSE	-72	32	-6	29	74
	Consumer NPC	3.62	0.81	1.07	0.77	0.58
	Consumer NAC	3.62	0.81	1.07	0.77	0.58
Other commodities	PSE (LC mn)	8 012	-12	652	-957	269
	Percentage PSE	79	0	4	-5	1
	Producer NPC	6.14	0.93	0.98	0.87	0.94
	Producer NAC	4.74	1.00	1.04	0.95	1.01
	Percentage CSE	-80	5	0	12	1
	Consumer NPC	5.47	0.96	1.00	0.89	0.99
	Consumer NAC	5.31	0.96	1.00	0.89	0.99
All commodities	PSE (LC mn)	35 840	10	2 429	-3 079	679
	Percentage PSE	78	0	4	-5	1
	Producer NPC	6.06	0.94	0.99	0.88	0.95
	Producer NAC	4.63	1.00	1.04	0.95	1.01
	Percentage CSE	-65	4	-1	11	2
	Consumer NPC	5.47	0.96	1.00	0.89	0.99
	Consumer NAC	2.93	0.96	1.01	0.90	0.98

p: provisional; n.c.: not calculated; LC: Local currency: for 1986-1988 USSR Rubles, for 2001-2003 Ukrainian Hryvnias. PSE: Producer Support Estimate. CSE: Consumer Support estimate. NPC: Nominal Protection Coefficient. NAC: Nominal Assistance Coefficient.

The PSE/CSE for "other commodities" is the residual of the PSE/CSE for all commodities minus the PSE/CSE for the commodities listed above.

Source: OECD, PSE/CSE database 2004.

Table of Contents

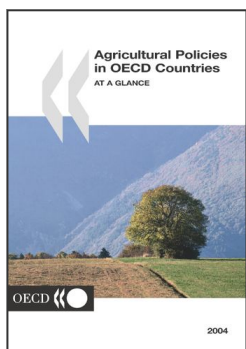
Executive Summary.....	9
Part I. EVALUATION OF SUPPORT POLICY DEVELOPMENTS.....	13
1. Evaluation of Support Policy Developments.....	14
Developments in policy and markets	15
The level of support to producers remains high... ..	15
... but has fallen somewhat over the longer term	19
The level of support varies widely among countries.....	19
The most distorting forms of support have declined but still dominate	19
New forms of support have been introduced	25
Differences in support levels across commodity also cause distortions.....	26
Support for general services to agriculture is increasing but remains low relative to support to producers	30
Total support to agriculture has decreased	32
Overall, some progress in reform has occurred.....	32
... but remains highly uneven across countries.....	34
Further efforts to reform agricultural policies are clearly required	35
Annex I.1. Policy Principles	36
Annex I.2. Operational Criteria.....	37
Annex I.3. Definitions of the OECD Indicators of Support.....	38
Part II. COUNTRY FOCUS	41
Australia.....	42
Canada.....	44
Czech Republic	46
European Union	48
Hungary.....	50
Iceland.....	52
Japan	54
Korea.....	56
Mexico	58
New Zealand.....	60
Norway	62
Poland.....	64
Slovak Republic	66
Switzerland.....	68
Turkey	70
United States	72

Part III. ANNEX TABLES ON ESTIMATES OF SUPPORT TO AGRICULTURE	75
Part IV. NON-MEMBER ECONOMIES	137
Russia	138
Ukraine.....	142
List of boxes	
I.1. Methodology for evaluating policy developments	14
I.2. Evaluating annual changes in the level of support in the OECD as a whole	16
List of tables	
I.1. OECD: Estimates of support to agriculture	17
I.2. OECD: Estimates of support to agriculture	18
I.3. OECD: Producer Support Estimate by country	21
I.4. OECD : Producer Support Estimate by commodity	28
I.5. OECD: General Services Support Estimate by country	31
II.1. Australia: Estimates of support to agriculture	43
II.2. Canada: Estimates of support to agriculture	45
II.3. Czech Republic: Estimates of support to agriculture.....	47
II.4. European Union: Estimates of support to agriculture.....	49
II.5. Hungary: Estimates of support to agriculture	51
II.6. Iceland: Estimates of support to agriculture	53
II.7. Japan: Estimates of support to agriculture	55
II.8. Korea: Estimates of support to agriculture	57
II.9. Mexico: Estimates of support to agriculture.....	59
II.10. New Zealand: Estimates of support to agriculture	61
II.11. Norway: Estimates of support to agriculture.....	63
II.12. Poland: Estimates of support to agriculture	65
II.13. Slovak Republic: Estimates of support to agriculture.....	67
II.14. Switzerland: Estimates of support to agriculture	69
II.15. Turkey: Estimates of support to agriculture	71
II.16. United States: Estimates of support to agriculture.....	73
III.1. OECD: Composition of Producer Support Estimate	76
III.2. OECD: Composition of General Services Support Estimate	79
III.3. OECD: Consumer Support Estimate by country	82
III.4. OECD: Consumer Support Estimate by commodity	84
III.5. OECD: Total Support Estimate by country	86
III.6. Australia: Main indicators by commodity.....	87
III.7. Canada: Main indicators by commodity	90
III.8. Czech Republic: Main indicators by commodity.....	93
III.9. European Union: Main indicators by commodity	96
III.10. Hungary: Main indicators by commodity	99
III.11. Iceland: Main indicators by commodity.....	102
III.12. Japan: Main indicators by commodity.....	105
III.13. Korea: Main indicators by commodity	108
III.14. Mexico: Main indicators by commodity	111
III.15. New Zealand: Main indicators by commodity	114
III.16. Norway: Main indicators by commodity.....	117

III.17. Poland: Main indicators by commodity.....	120
III.18. Slovak Republic: Main indicators by commodity.....	123
III.19. Switzerland: Main indicators by commodity.....	126
III.20. Turkey: Main indicators by commodity	129
III.21. United States: Main indicators by commodity	132
III.22. Change in Producer Support Estimate (PSE) 2002 to 2003: Contribution of Market Price Support (MPS) and Budgetary Payments (BP).....	135
III.23. Change in Market Price Support (MPS) 2002 to 2003: Contribution of its elements....	136
IV.1. Russia: Estimates of support to agriculture	139
IV.2. Russia: Main indicators by commodity	140
IV.3. Ukraine: Estimates of support to agriculture	143
IV.4. Ukraine: Main indicators by commodity.....	144

List of figures

I.1. Evolution of Producer Support Estimate (% PSE), Nominal Protection Coefficient (NPCp) and Nominal Assistance Coefficient (NACp).....	16
I.2. Producer Support Estimate by country	20
I.3. Producer Nominal Assistance Coefficient by country.....	20
I.4. Composition of Producer Support Estimate for the OECD.....	23
I.5. Composition of Producer Support Estimate by country, 1986-88 and 2001-03.....	23
I.6. Producer Nominal Protection Coefficient by country	24
I.7. Consumer Support Estimate by country	25
I.8. Producer Support Estimate by commodity, 1986-88 and 2001-03.....	27
I.9. Producer Nominal Protection Coefficient by commodity.....	27
I.10. Spread in commodity support by country	30
I.11. Total Support Estimate by country	33
I.12. Changes in the level, spread and composition of support in the OECD.....	33



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