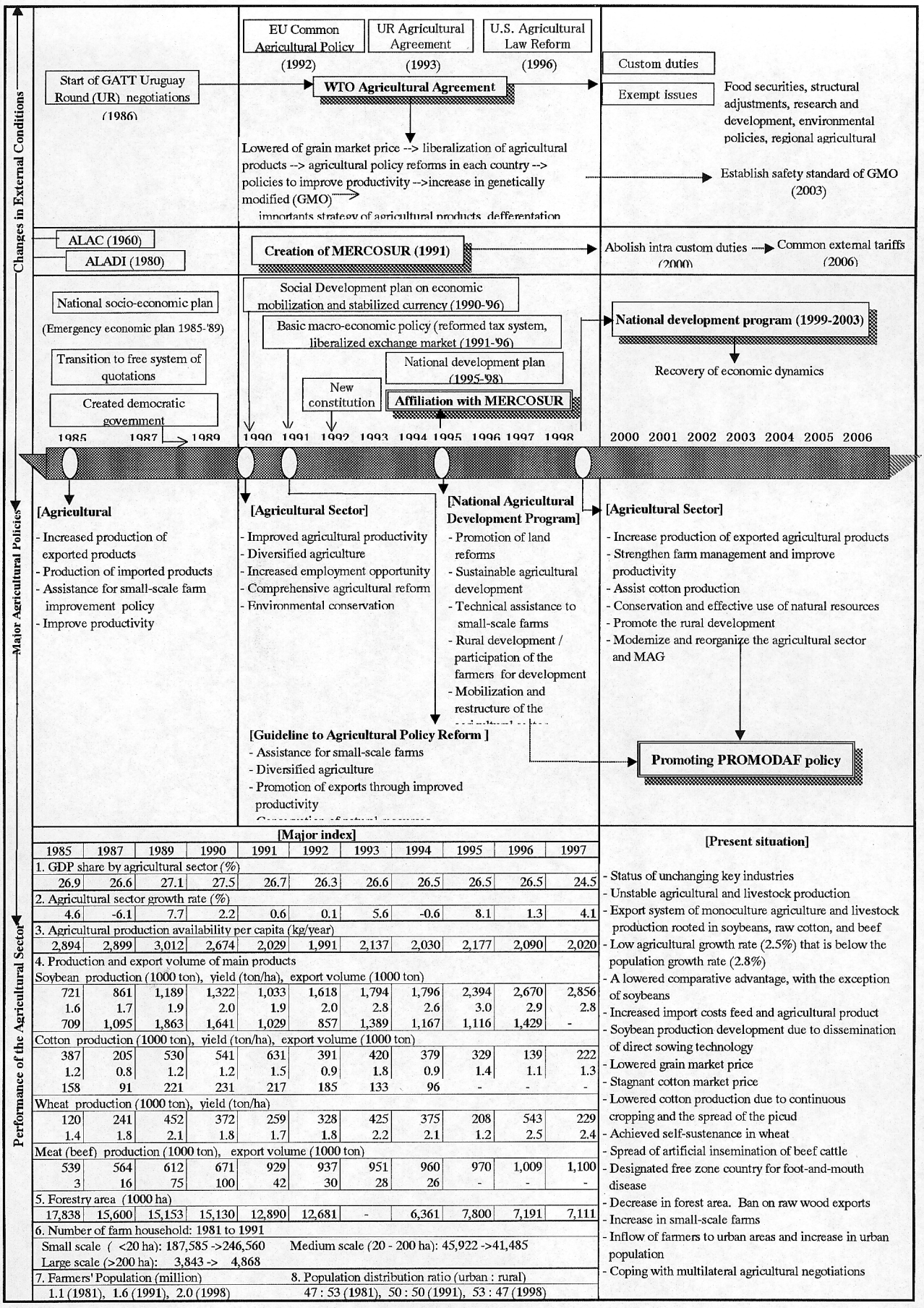
Figure 1 Transitions of Major Agricultural Development Policy



[Major index]

1985	1987	1989	1990	1991	1992	1993	1994	1995	1996	1997
1. GDP share by agricultural sector (%)										
26.9	26.6	27.1	27.5	26.7	26.3	26.6	26.5	26.5	26.5	24.5
2. Agricultural sector growth rate (%)										
4.6	-6.1	7.7	2.2	0.6	0.1	5.6	-0.6	8.1	1.3	4.1
3. Agricultural production availability per capita (kg/year)										
2,894	2,899	3,012	2,674	2,029	1,991	2,137	2,030	2,177	2,090	2,020
4. Production and export volume of main products										
Soybean production (1000 ton), yield (ton/ha), export volume (1000 ton)										
721	861	1,189	1,322	1,033	1,618	1,794	1,796	2,394	2,670	2,856
1.6	1.7	1.9	2.0	1.9	2.0	2.8	2.6	3.0	2.9	2.8
709	1,095	1,863	1,641	1,029	857	1,389	1,167	1,116	1,429	-
Cotton production (1000 ton), yield (ton/ha), export volume (1000 ton)										
387	205	530	541	631	391	420	379	329	139	222
1.2	0.8	1.2	1.2	1.5	0.9	1.8	0.9	1.4	1.1	1.3
158	91	221	231	217	185	133	96	-	-	-
Wheat production (1000 ton), yield (ton/ha)										
120	241	452	372	259	328	425	375	208	543	229
1.4	1.8	2.1	1.8	1.7	1.8	2.2	2.1	1.2	2.5	2.4
Meat (beef) production (1000 ton), export volume (1000 ton)										
539	564	612	671	929	937	951	960	970	1,009	1,100
3	16	75	100	42	30	28	26	-	-	-
5. Forestry area (1000 ha)										
17,838	15,600	15,153	15,130	12,890	12,681	-	6,361	7,800	7,191	7,111

6. Number of farm household: 1981 to 1991
Small scale (<20 ha): 187,585 ->246,560 Medium scale (20 - 200 ha): 45,922 ->41,485
Large scale (>200 ha): 3,843 -> 4,868

7. Farmers' Population (million)
1.1 (1981), 1.6 (1991), 2.0 (1998)

8. Population distribution ratio (urban : rural)
47 : 53 (1981), 50 : 50 (1991), 53 : 47 (1998)

[Present situation]

- Status of unchanging key industries
- Unstable agricultural and livestock production
- Export system of monoculture agriculture and livestock production rooted in soybeans, raw cotton, and beef
- Low agricultural growth rate (2.5%) that is below the population growth rate (2.8%)
- A lowered comparative advantage, with the exception of soybeans
- Increased import costs feed and agricultural product
- Soybean production development due to dissemination of direct sowing technology
- Lowered grain market price
- Stagnant cotton market price
- Lowered cotton production due to continuous cropping and the spread of the picud
- Achieved self-sustenance in wheat
- Spread of artificial insemination of beef cattle
- Designated free zone country for foot-and-mouth disease
- Decrease in forest area. Ban on raw wood exports
- Increase in small-scale farms
- Inflow of farmers to urban areas and increase in urban population
- Coping with multilateral agricultural negotiations