ANRPC Monthly Bulletin of Rubber Statistics



A monthly statistical bulletin of

Association of Natural Rubber Producing Countries

7th Floor, Bangunan Getah Asli (Menara), 148 Jalan Ampang, 50450 Kuala Lumpur, Malaysia Tel: +603 2161 1900; Fax: +603 2161 3014; E-mail: anrpc@streamyx.com Website: www.anrpc.org

Members: China, India, Indonesia, Malaysia, Papua New Guinea, Singapore, Sri Lanka, Thailand, Vietnam

Contact Persons:

Prof. Dr. Djoko Said Damardjati, Secretary General

Jom Jacob, Senior Economist

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FOREWORD

The very purpose of bringing out the ANRPC Monthly Bulletin of Rubber Statistics is ensuring availability of up-to-date and 100% authentic data of the NR industry. Member governments of the ANRPC account for around 94% of the global production of natural rubber and each government has a designated official for reporting official data to the ANRPC Secretariat on a monthly basis. The publication of ANRPC Monthly Bulletin of Rubber Statistics is fully based on official data reported by the designated officials in respective governments. Data and forecasts officially reported by Member Governments at the end of March 2009 are provided in this issue of the publication. A detailed report providing a review of NR production in each Member Country and the outlook for 2009 are also included. Some useful relevant statistics available from secondary sources are also reported.

While acknowledging the valuable support received from all Member Governments in bringing out the second issue of this new publication, I take this opportunity to encourage users to bring their suggestions and feedback to our notice.

Prof. Dr. Djoko Said Damardjati Secretary General

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Mr. Phillip Pondikou who was Secretary General of the ANRPC during 2004-07 passed away on 2 April 2009 in Port Moresby, following a sudden cardiac arrest. Mr. Pondikou was 59. He had made valuable contributions in strengthening the Association. After successfully completing his tenure with Association, Mr. Pondikou was heading the Rubber Division of the Department of Agriculture & Livestock, Government of Papua New Guinea where he was engaged in a pivotal role in resurrecting and developing the country's rubber industry. The Association deeply condoles the untimely sad demise of Mr. Phillip Pondikou.

GLOBAL PRODUCTION OF NR ON THE DECLINE

Production of natural rubber (NR) entered into a declining phase in all producing countries, according to estimates at the end of March 2009. Thailand, Indonesia, Malaysia, India, Vietnam, China and Sri Lanka accounted for around 94% of the global production of NR during 2008. Total production in these seven countries is anticipated to decline by 2.2% in 2009, further to 0.4% dip in 2008.

In Thailand, the largest NR producing country accounting for about 33% of the global supply, production dropped by 13.9% during the first two months of 2009 on year-over-year basis. Department of Agriculture of the Ministry of Agriculture and Cooperatives of Thailand anticipates the production during the year 2009 to be lower by 0.5% from 2008.

Production in Indonesia is anticipated to decline during 2009 by 6.0% in spite of the expected expansion in tappable area by 30,000 hectare, according to estimates of the Directorate of Perennial Crops, Ministry of Agriculture. Being the second largest producing country accounting for around 29% of the global supply, this 6% decline would bring down the global supply by 165,000 tonnes.

In Malaysia, where the production had declined by 10.7% during 2008, a further decline by 4.6% is anticipated for 2009. Estimates of the Malaysian Rubber Board reveal 43.5% decline in output during January 2009 as compared to January 2008. Tapped area which came down by 173,000 ha in 2008 is anticipated to come down further by 20,000 ha in 2009.

India has scaled down the production forecasts for 2009 in the backdrop of an unusually severe drought experienced during the first quarter of the year in the country's major rubber growing region. Production declined by 11.2% during the first quarter, according to the estimates of the Rubber Board of India. Production during the year 2009 is anticipated to decline by 2.7% to 857,000 tonnes. Although tapped area could marginally expand by 2,000 ha, average yield is anticipated to come down to 1850 kg/ha in 2009 from 1912 kg/ha in 2008.

Vietnam had witnessed 1.8% decline in production during the first quarter of 2009, according to Vietnam Rubber Association's estimates endorsed by the Vietnam Rubber Group. The production during the year 2009 is anticipated to decline by 2.0% due to shrinkage in tappable area by 16,700 ha coupled with decline in average yield to 1661 kg/ha from 1700 kg/ha in 2008.

production China, although anticipated to increase by 13.7% in 2009, this is only a return to the normal production after the drastic fall in the previous year. Production had fallen by 13.3% during 2008 due to adverse climate. Even with this anticipated 13.7% increase, production would still be marginally lower than the pre-2008 level. Rubber Research Institute under the China Academy of Tropical Agricultural Sciences in Hainan Province anticipates that the production would be 580,000 tonnes in 2009 as compared to 510,000 tonnes in 2008 and 588,000 tonnes in 2007.

Production in Sri Lanka is anticipated to decline during 2009 by 2.3% to 126,000 tonnes from 129,000 tonnes in 2008, according to estimates of the Rubber

Development Department of the Ministry of Plantation Industries. This is due to reduction in tappable area by 2,000 ha and decline in average yield from 1360 kg/ha in 2008 to 1319 kg/ha in 2009.

The following table summarises the trends in production of NR in each country from 2005 to 2008 and anticipates for 2009:

Trends in Production of NR

('000 tonnes)

	2005	2006	2007	2008(1)	2009(2)
Thailand	2937	3137	3056	3090	3075
Indonesia	2271	2637	2755	2751	2586
Malaysia	1126	1284	1200	1072	1023
India	772	853	811	881	857
Vietnam	482	555	602	663	650
China	541	538	588	510	580
Sri Lanka	104	109	118	129	126
Total	8233	9113	9130	9096	8897

⁽¹⁾ Provisional

Rates of growth in production in the above seven countries are given in the following table:

Annual Growth in Production of NR

(%)

		(70)			
	2005	2006	2007	2008(1)	2009(2)
Thailand	-1.6	6.8	-2.6	1.1	-0.5
Indonesia	9.9	16.1	4.5	-0.1	-6.0
Malaysia	-3.7	14	-6.5	-10.7	-4.6
India	3.9	10.5	-4.9	8.6	-2.7
Vietnam	15	15.1	8.5	10.1	-2.0
China	-5.7	-0.6	9.3	-13.3	13.7
Sri Lanka	9.5	4.8	8.3	9.3	-2.3
Aggregate	2.3	10.7	0.2	-0.4	-2.2

⁽¹⁾ Provisional

Total production in the seven countries had declined by 0.4% during 2008. In 2009, this is expected to decline further by 2.2%.

AVERAGE YIELD

Average yield, measured in terms of annual production per hectare of tapped area in ANRPC Member countries, for the period from 2003 to 2009 are given in the table below:

Average Annual Yield

(Kg)

Year	China	India	Indon	Malaysia	Sri	Thailand	Vietnam
			esia		Lanka		
2003	1296	1654	765	(3)	1067	(3)	1363
2004	1268	1689	839	(3)	1057	(3)	1393
2005	1082	1727	862	990	1145	1736	1441
2006	1128	1879	967	1114	1128	1800	1558
2007	1168	1767	992	1420	1247	1728	1612
2008(1)	1000	1912	1004	1430	1360	1711	1661
2009(2)	1150	1850	1003	1450	1319	(3)	1700

⁽¹)Provisional; (²) Anticipated based on information available up to March 2009; (³) Not available;

Note: Yield reported by respective governments. Need not agree with those estimated by dividing production by tapped area because in the case of a few countries, entire tapped is not accounted in estimating yield.

List of ANRPC Publications

Industry Update

Market Update

Daily Prices of Natural Rubber

Natural Rubber Market Review

ANRPC Directory of Rubber Organizations 2008

ANRPC Directory of NR Exporters 2008

ANRPC Monthly Bulletin of Rubber Statistics

ANRPC Annual Bulletin of Rubber Statistics

Statistical Profile of Small Rubber Holdings

Statistics of Rubber Wood

Proceedings of Workshop/Seminar/Conference

⁽²⁾ Anticipated based on information available up to March 2009 Source: Reported by respective governments.

⁽²⁾ Anticipated based on information available up to March 2009 Source: Reported by respective governments

TRENDS IN NATURAL RUBBER PRICES

Weekly average prices of TSR, RSS and Latex in important markets during February and March 2009 are given below:

Weekly Average Prices of Natural Rubber

(US \$ per 100 kg)

End of the	TSI	2	Ì		RSS		Latex
Week	Kuala Lumpur SMR20 (1)	Bangkok STR20 (2)	Bangkok RSS3 (2)	Singapore RSS3 (3)	Kottayam (India) RSS4 (4)	Colombo RSS1 (5)	Malaysia Latex 60% ⁽⁶⁾
7 Feb. 09	138.05	142.27	150.94	151.63	140.43	(7)	114.92
14 Feb. 09	138.58	140.65	151.01	152.57	138.39	119.19	116.34
21 Feb. 09	136.73	138.33	150.60	147.79	140.38	121.6	122.56
28 Feb. 09	136.27	136.30	145.74	144.58	141.42	(7)	122.16
07 Mar. 09	134.29	135.02	143.99	140.23	137.66	(7)	125.07
14 Mar. 09	136.11	135.22	144.64	140.76	142.13	123.27	126.58
21 Mar. 09	138.89	136.85	145.19	144.26	146.81	125.88	130.39
28 Mar. 09	143.15	142.73	148.44	149.30	159.79	129.45	133.05

- (1) FOB physical price at 5.00 p.m. quoted by buyers;
- (2) FOB physical price reported by Rubber Research Institute of Thailand.
- (3) FOB physical price at 12.00 noon quoted by buyers in SICOM.
- (4) Average price reported by Rubber Board of India (Relate to local market. Does not include taxes or other charges).
- (5) Average rate pertaining to Colombo Auction.
- (6) Average farm-gate prices in North, Central and South Malaysia for dry weight of rubber content
- (7) Not available.

TRENDS IN CRUDE PETROLEUM OIL PRICE

Prices of West Texas Intermediate (WTI) crude petroleum oil averaged at US\$72.34 per barrel during 2007 and US\$99.67 per barrel during 2008. According to *Short Term Energy Outlook* released by the Energy Information Administration of the US Government on 10 March 2009, prices are projected to average at US\$42 per barrel in 2009 and US\$53 per barrel in 2010. Weekly average prices of WTI crude petroleum oil in February and March 2009 are given below:

Weekly Average Prices of Crude Petroleum Oil

(US\$/barrel)

End of the Week	US dollar per barrel
06 February 2009	40.78
13 February 2009	36.94
20 February 2009	37.15
27 February 2009	41.10
06 March 2009	43.18
13 March 2009	45.66
20 March 2009	49.49
27 March 2009	52.99

Source: Energy Information Administration, The US Government.

Notes: (1) Prices refer to WTI Spot FOB; (2) 1 Barrel = 42 US gallons = 159 litre.

Table 1: Production of Natural Rubber in ANRPC Member Countries ('000 tonnes)

Year	Ch	nina	Inc	dia	Indo	nesia	Mala	aysia	Papua Ne	ew Guinea	Sri L	anka	Tha	iland	Viet	nam
2005	54	1.0	7	72	22	271	11	126		4.7	10	4.4	29	937	48	1.6
2006	53	8.0	3	353	26	637	12	284		4.5	10	9.2	3	137	55	5.4
2007	58	8.0	3	311	27	755	12	200		*	117.6		3056		60	1.7
2008(1)	51	0.0	3	881	27	751	10)72		*		9.2	30	090	66	2.9
2009(2)	58	0.0	3	357	25	2586 2009 ⁽³⁾ 2008 ⁽¹⁾)23		*	12	6.0	30)75	65	0.0
Month	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)			2009(3)	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)
January	*	*	104	93	215	*	126.1	71.2	*	*	12.0	12.1	326	287	62.6	61.4
February	*	*	55	44	254	*	115.1	*	*	*	13.1	12.5	273	229	10.4	10.2
March	*	*	47	46	245	*	76.9	*	*	*	11.8	11.4	251	*	3.0	3.0
April	*	*	57	56	231	*	73.7	*	*	*	9.8	9.6	226	*	8.9	8.7
May	*	*	60	58	246	*	82.2	*	*	*	9.9	9.6	200	*	25.3	24.8
June	*	*	62	60	230	*	87.4	*	*	*	10.5	10.2	212	*	51.7	50.7
July	*		63		249		102.4		*		10.8		286		78.0	76.4
August	*		73		230		103.6		*		10.9		283		63.0	61.7
September	*		80		244		106.2		*		11.5		301		82.0	80.4
October	*		84		194		66.5		*		9.4		330		85.0	83.3
November	*		96		199		70.2		*		9.4		183		91.0	89.2
December	*		100		214		62.1		*		10.1		219		102.0	100.2

⁽¹⁾ Provisional; (2) Anticipated; (3) Provisional data for January to March 2009 and anticipated data for rest of the year; * Not available. Source: Reported by respective governments.

Table 2: Consumption of Natural Rubber in ANRPC Member Countries ('000 tonnes)

Year	Ch	ina	lr	ndia	Indo	nesia	Mal	aysia	Papua N	lew Guinea	Sri I	_anka	Tha	iland	Viet	nam
2005	*			789		221		386	*		7	72.7	,	335	6	0.0
2006	*			815		355		383	*		6	33.1	;	321	6	55.0
2007	*			851		391		450		*		73.9	374		8	30.0
2008(1)	*			881	414		414 469		*		8	30.1	;	398		0.0
2009(2)	*			854	431			466	*		85.0			*	11	0.0
Month	2008(1)	2009(3)	2008(1)	2009(3)	2008(1) 2008(3)		2008(1)	2009(3)	2007	2008(3)	2008(1)	2009(3)	2008(1)	2008(3)	2008(1)	2009(3)
January	*	*	71	64	* *		41.4	35.8	*	*	7.0	7.4	33	29	9.0	10.0
February	*	*	74	69	*	*	38.3	*	*	*	7.3	7.7	35	29	8.0	10.0
March	*	*	74	70	*	*	40.0	*	*	*	7.3	7.7	36	29	8.0	9.0
April	*	*	70	71	*	*	38.7	*	*	*	6.1	6.5	30	*	8.0	9.0
May	*	*	71	71	*	*	39.3	*	*	*	7.3	7.8	35	*	9.0	9.0
June	*	*	74	72	*	*	37.4	*	*	*	7.6	*	35	*	9.0	9.0
July	*		78		*		37.7		*		7.7		34		9.0	9.0
August	*		76		*		38.9		*		6.2		34		8.0	9.0
September	*		76		*		37.5		*		7.0		34		8.0	9.0
October	*		76		*		36.0		*		5.5		35		8.0	9.0
November	*		73		*		38.4		*		4.5		30		8.0	9.0
December	*		68		*		45.4		*		6.6		27		8.0	9.0

⁽¹⁾ Provisional; (2) Anticipated; (3) Provisional data for January to March 2009 and anticipated data for rest of the year; * Not available. Source: Reported by respective governments.

Table 3: Gross Export of Natural Rubber from ANRPC Member Countries ('000 tonnes)

Year	Ch	ina	Ind	dia	Indo	nesia	Malay	/sia	Papua Ne	ew Guinea	Sing	apore	Sri La	anka	Thai	land	Viet	nam
2005	5	.0	60)	20)24	1128	3	4.7	7	350		3	1.6	26	32	56	6.5
2006	4	.0	7′	1	22	287	1134	1	4.5	5	238	3.4	40	5.3	27	72	67	3.4
2007	4	.0	29)	24	107	1018	3		*	153.0		51.4		2704		68	1.9
2008(1)	3	.0	77	7	2296		917	917		917 * 138.2		48	3.6	26	375	61	9.3	
2009(2)		*	44	1	21	158	1100 2008 ⁽¹⁾ 2009 ⁽³⁾			*		*		*		*	60	0.0
Month	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)
January	*	*	8	1	181.2	114.0	79.3	52.9	*	*	10.4	*	5.1	4.8	263	214	49.7	35.0
February	*	*	15	2	227.1	140.3	83.3	*	*	*	15.1	*	5.8	4.8	242	210	28.9	39.4
March	*	*	13	3	206.7	*	100.5	*	*	*	14.0	*	5.2	4.4	226	190	36.7	40.0
April	*	*	4	2	198.9	*	89.2	*	*	*	11.2	*	4.0	3.4	206	*	37.1	35.9
May	*	*	3	2	210.3	*	77.7	*	*	*	11.8	*	2.5	2.1	191	*	28.3	27.4
June	*	*	10	2	199.6	*	74.8	*	*	*	15.8	*	2.2	3.5	206	*	48.0	46.5
July	*		9		212.8		82.5		*		14.7		3.0		249		67.4	65.3
August	*		3		198.1		82.7		*		13.5		3.8		254		64.9	62.9
September	*		2		217.4		83.5		*		10.0		4.2		257		67.5	65.3
October	*		3		167.7		64.9		*		9.0		3.9		250		64.9	62.9
November	*		4		144.3		52.8		*		5.6		3.9		161		56.9	55.1
December	*		3		131.4		44.4		*		7.1		5.0		170		69.2	64.3

⁽¹⁾ Provisional; (2) Anticipated; (3) Provisional data for January to March 2009 and anticipated data for rest of the year; * Not available. Source: Reported by respective governments.

Table 4: Gross Import of Natural Rubber in ANRPC Member Countries ('000 tonnes)

Year	Cł	nina	Inc	dia	Indo	nesia	Mala	aysia	Sing	apore	Sri L	anka .	Tha	iland	Viet	nam
2005	140	07.0		62		6.6	4	162		228	1	0.3		1.6	14	1.0
2006	16	12.0		50		6.9	į	512		184	7.2		1.6		18	5.0
2007	16	47.0	1	114		9.8	(605		158	9.1		1.9		13	0.0
2008(1)	168	82.0		83	1	2.5	į	523		138	3.6			4.5	15	0.0
2009(2)	140	0.00		52		7.3		500		*		*		*	13	0.0
Month	2008(1)	2009(1)	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)
January	*	*	9	6	1.3	*	71.3	37.4	15.5	*	0.0	0.4	Negligible	*	8.2	7.4
February	*	*	5	2	1.1	*	48.6	*	14.9	*	0.0	0.2	Negligible	*	7.1	14.3
March	*	*	4	3	1.0	*	46.4	*	16.6	*	0.2	0.2	Negligible	*	6.6	5.6
April	*	*	4	3	0.6	*	42.0	*	13.9	*	0.0	0.1	Negligible	*	5.9	5.1
May	*	*	10	3	1.4	*	35.0	*	12.2	*	0.2	0.2	Negligible	*	26.6	22.8
June	*	*	7	6	1.0	*	42.5	*	9.5	*	1.4	1.5	Negligible	*	47.3	31.9
July	*		2		1.2		38.7		12.9		0.3		Negligible		10.5	9.0
August	*		4		0.9		36.9		12.3		0.1		Negligible		10.1	8.7
September	*		13		1.3		38.7		10.9		0.6		Negligible		7.6	6.5
October	*		16		0.7		40.3		7.3		0.6		Negligible		7.3	6.3
November	*		5		0.8		46.9		5.3		0.2		Negligible		8.1	6.9
December	*		4		1.2		35.5		6.9		0.0		Negligible		4.9	5.5

⁽¹⁾ Provisional; (2) Anticipated; (3) Provisional data for January to March 2009 and anticipated data for rest of the year; * Not available. Source: Reported by respective governments.

Table 5: Stock of Natural Rubber in ANRPC Member Countries ('000 tonnes)

Year	Ch	ina	In	dia	Indon	nesia ⁽⁴⁾	Mal	laysia		ia New inea	Sing	apore	Sri Lanka		Thailand		Vietnam	
2005		*		117		57		164		*	1:	2.4	1	9.0	2	204	10	08.1
2006	16	9.0	,	142		60		188		*	2.4		18.7		250		10	09.9
2007	17	7.0	,	192		26	153			*		*	1	1.0	2	230	8	80.0
2008(1)	25	0.0		210		80	156			*		2.5	1	4.6	2	252		73.8
2009(2)		*		222		85	*			*		*	1	5.0		*	24	43.8
Month	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)	2008(1)	2009(3)
January	*	*	225	243	*	*	181.1	165.4	*	*	4.7	*	11.0	14.6	260	295	92.2	197.6
February	*	*	198	219	*	*	204.9	*	*	*	6.4	*	11.0	14.6	257	305	72.8	172.7
March	*	*	164	195	*	*	177.4	*	*	*	6.7	*	10.2	10.4	246	*	37.7	132.3
April	*	*	153	182	*	*	150.5	*	*	*	10.0	*	9.9	10.4	237	*	7.4	101.2
May	*	*	149	170	*	*	133.6	*	*	*	13.7	*	9.9	10.4	211	*	22.0	112.4
June	*	*	136	163	*	*	119.0	*	*	*	9.6	*	10.6	10.5	182	*	64.0	139.5
July	*		115		*		128.9		*		7.0		10.7		186		76.1	150.6
August	*		114		*		132.9		*		4.3		11.6		183		76.3	149.1
September	*		130		*		143.0		*		4.1		12.0		194		90.5	161.7
October	*		152		*		144.5		*		3.8		12.0		239		109.9	179.4
November	*		177		*		148.5		*		3.6		13.0		230		144.1	211.4
December	250.0	(2) 5	210		*	2000	156.3		*	(4) 61	2.5	, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	14.6		252		173.8	243.8

⁽¹⁾ Provisional; (2) Anticipated; (3) Provisional data for January to March 2009 and anticipated data for rest of the year; (4) Stock with Estates; * Not available. Source: Reported by respective governments.

Table 6: Total Planted Area and Tapped Area in ANRPC Member Countries ('000 hectares)

	Ch	nina	Inc	dia	Indo	nesia	Mala	aysia	Papua N	lew Guinea	Sri L	anka	Thai	land	Viet	nam
Year	Total	Tapped	Total	Tapped	Total	Tapped	Total	Tapped	Total	Tapped	Total	Tapped	Total	Tapped	Total	Tapped
	area	area	area	area	area	area	area	area	area	area	area	area	area	area	area	area
2005	741.0	471.0	598	447	3230	2634	1259	1174	*	*	116.1	91.2	2175	1692	482.7	334.2
2006	776.0	495.0	615	454	3286	2726	1251	1153	*	*	117.7	96.8	2297	1743	522.0	356.4
2007	875.0	503.0	635	459	3354	2776	1245	1146	*	*	119.5	94.3	2457	1768	556.3	373.3
2008(1)	920.0	510.0	655	461	3433	2813	1247	973	*	*	122.0	95.0	2497	1800	618.6	399.0
2009(2)	950.0	504.0	665	463	3453	2843	1222	953	*	*	124.0	93.0	*	*	648.6	382.3

⁽¹⁾ Provisional; (2) Anticipated; * Not available. Source: Reported by respective governments.

Table 7: Area Planted during each Year in ANRPC Member Countries ('000 hectares)

Tuble 7. Area Flanted during each Tear in Arter e Member Countries (000 nectates)																
Year	China		India		Indonesia		Malaysia		Papua New Guinea		Sri Lanka		Thailand		Vietnam	
	New-	Re-	New-	Re-	New-	Re-	New-	Re-	New-	Re-	New-	Re-	New-	Re-	New-	Re-
	planted	planted	planted	planted	planted	planted	planted	planted	planted	planted	planted	planted	planted	planted	planted	planted
2005	44.2(4)		14.8	7.5	17.1	5.0	0.0	20.6	*	*	1.0	2.5	53.1	50.4	28.6	4.7
2006	58.2(4)		19.3	8.4	67.0	44.9	0.0	20.2	*	*	1.9	4.4	118.8	36.8	39.5	4.6
2007	*	*	20.5	8.5	67.3	50.0	0.0	23.1	*	*	2.0	5.2	139.9	35.2	34.1	7.0
2008(1)	*	*	20.0	8.7	19.1	40.0	11.0	20.7	*	*	2.1	1.0	40.0	31.9	62.3	8.0
2009(2)	*	*	13.0	9.0	20.6	55.0	*	20.0	*	*	3.1	3.6	*	*	30.0	9.0

⁽¹⁾ Provisional; (2) Anticipated; (4) Total area newplanted or replanted during the year; * Not available. Source: Reported by respective governments.