

CHANGES IN MARKET DRIVERS

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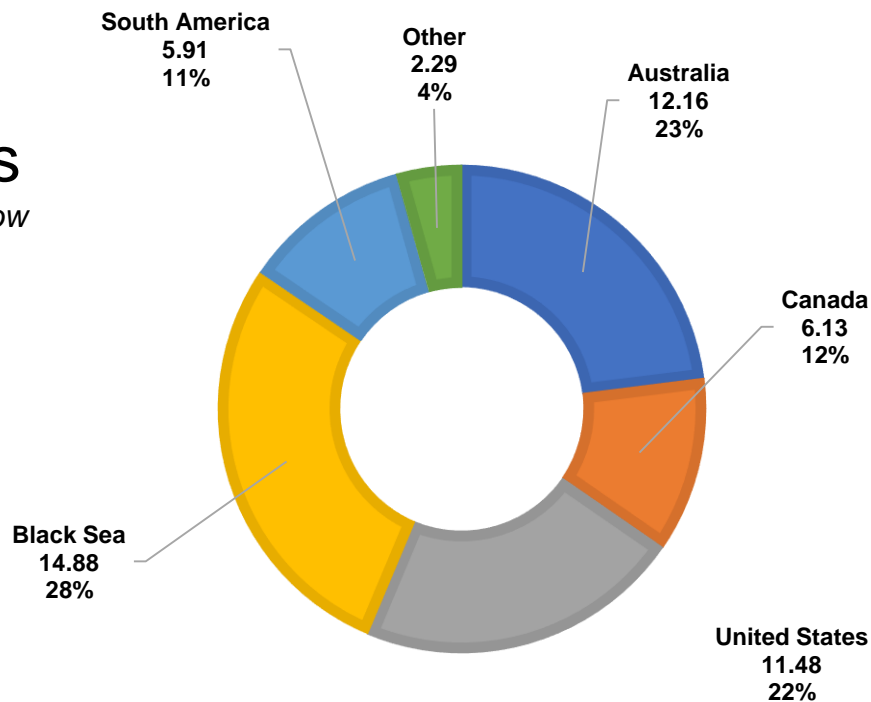


Macro picture

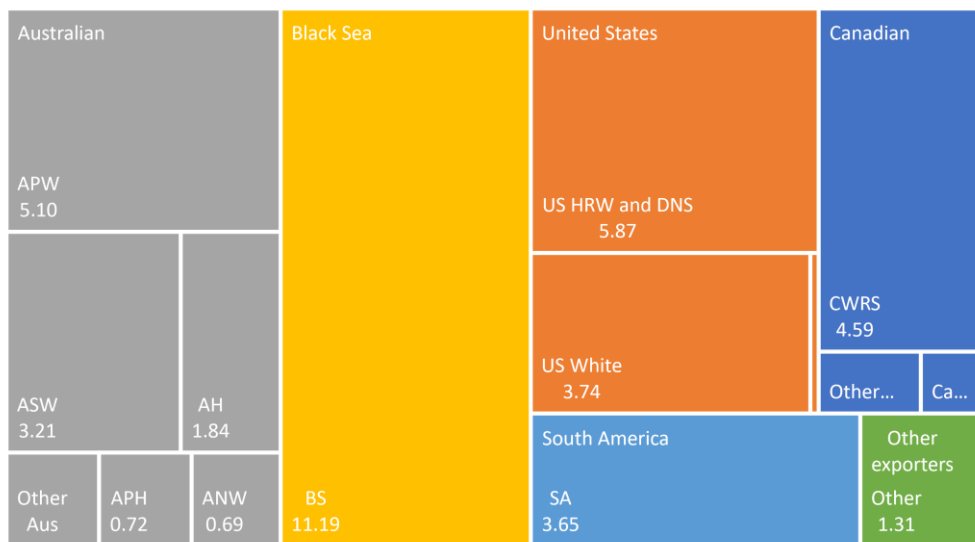
Aggregated totals

Totals for the seven countries below

2030 - 52.84 MMT








Wheat imports by grade estimates for 2030

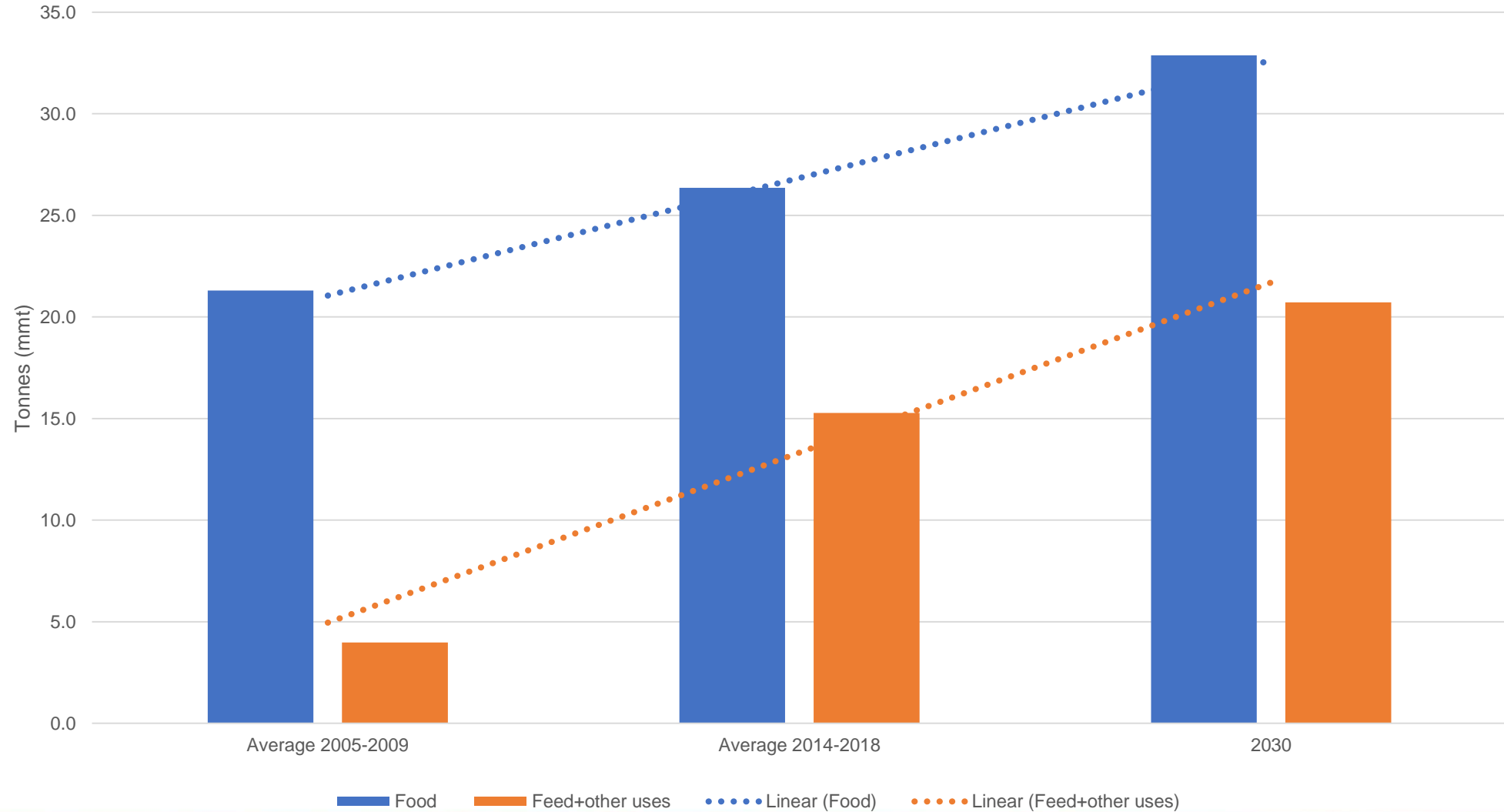


Food use 2030

mmt

	Instant noodles	8.37
	Other noodles	3.64
	Bread	12.85
	Cakes and biscuits	4.61
	Home use	3.19

Food vs feed



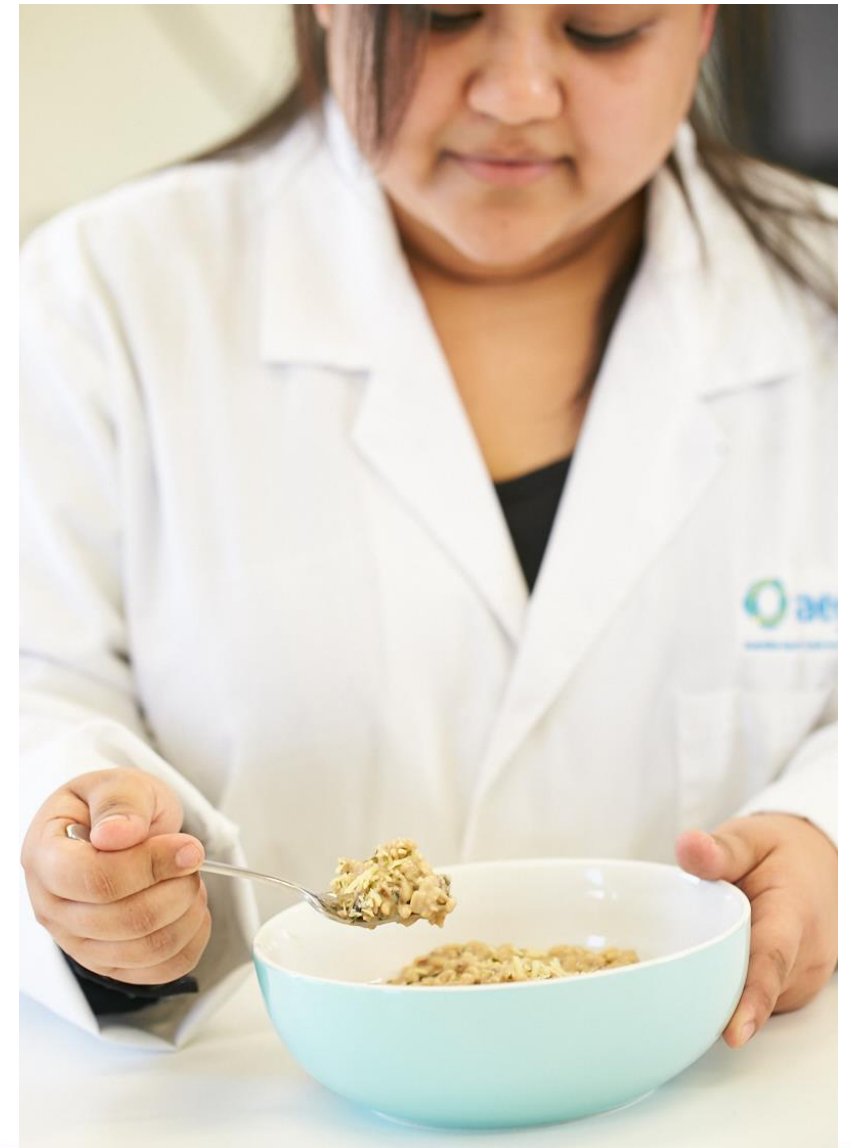
Politics is changing market dynamics



Consumers are more discerning than ever



Health and nutrition



Higher value uses



Thank you

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