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Outlook for U.S. Agricultural Trade

FY 2013 Exports Forecast at a Record \$145 Billion; Imports at a Record \$115 Billion

Fiscal 2013 agricultural exports are forecast at a record \$145 billion, up \$1.5 billion from the August forecast and \$9.2 billion above fiscal 2012 exports. Grain and feed exports are forecast down \$1.9 billion mostly due to lower corn exports. Oilseed exports are up \$3.3 billion on much higher volumes and record prices. Cotton exports are forecast down \$200 million in part due to reduced Chinese demand. Horticultural exports are unchanged at a record \$32 billion. The forecast for livestock, poultry and dairy is down \$100 million on lower poultry, beef, and cattle exports.

U.S. imports are projected at a record \$115 billion in fiscal 2013, up 11 percent from 2012's imports of \$103.4 billion, but down \$2 billion from the August forecast for 2013. The reduced forecast for 2013 is largely due to significantly lower prices for tropical oils, processed fruits and vegetables, sugar, coffee, rubber, and cocoa.

The forecast trade balance for fiscal 2013 shows a surplus of \$30 billion, down \$2.4 billion from 2012.

Table 1--U.S. agricultural trade, fiscal years 2007-13, year ending September 30

Item	2007	2008	2009	2010	2011	2012	Forecast fiscal year	
							2013 Aug.	Nov.
<i>Billion dollars</i>								
Exports	82.2	114.9	96.3	108.6	137.4	135.8	143.5	145.0
Imports	70.1	79.3	73.4	79.0	94.5	103.4	117.0	115.0
Balance	12.2	35.6	22.9	29.6	42.9	32.4	26.5	30.0

Reflects forecasts in the November 9, 2012, *World Agricultural Supply and Demand Estimates* report.
Source: Compiled by USDA using data from U.S. Census Bureau, U.S. Department of Commerce.

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The next release is
February 21, 2013

Approved by the
World Agricultural
Outlook Board.

World Growth Rebounds in 2013

World 2012 growth is expected to have slowed to 2.4 percent. Trade growth dropped to an estimated 2 percent, a sharp slowing from the 7 percent rate of 2011. As a result, manufacturing expansion slowed sharply in United States and the developing economies in the first 10 months of 2012. The dollar will likely appreciate in 2012. The dollar strengthened against the euro as the Eurozone recession, coupled with the evolving euro debt situation, induced flows into dollar-based assets. Asian growth has slowed as the European export market dried up. Western Hemisphere growth partly offset the European recession's impact on developing economies' exports and growth.

Monetary authorities have been boosting credit availability as growth has slowed. In the developing world, prior tight credit, currency appreciation, and a continuing recession in much of Europe are slowing growth prospects and will provide a drag on world growth into early 2013. China is expected to have faster export growth, but rising wages, and reluctance by both households and businesses to increase borrowing may curtail the growth impact of eased credit policies. In Brazil and Argentina—due to strong export growth, higher investment and high commodity prices—faster growth is expected in 2013. The main risk to world growth in 2013—a significant spillover of the Eurozone problem to North American and Asian financial institutions and markets—seems to be subsiding. The expected end of the Eurozone recession, coupled with higher expected U.S. growth in 2013, will move the world economy in 2013 to a higher growth path.

The small dollar appreciation seen in 2012 but depreciation is expected in 2013. The dollar and low interest rates will facilitate continued inexpensive credit for financing trade. Total world trade growth is expected to be between 4 and 5 percent in 2013. Higher expected world growth, especially in developing economies, lower energy prices, and available credit make the outlook for U.S. agricultural trade promising in 2013. The expected depreciation of the dollar will have a small positive impact on trade in 2013.

Table 2--Macroeconomic variables affecting U.S. agricultural exports 1/

Region/country	Share of world GDP (2010)	GDP		Real exchange rate 2/		CPI	
		2012	2013	2012	2013	2012	2013
		Growth rate				Growth rate	
World	100.0	2.4	2.7	0.5	-1.2	3.7	2.4
NAFTA	30.3	2.3	2.6	-2.2	0.9	1.9	2.0
Canada	2.4	2.2	2.3	-2.2	0.9	1.6	1.9
United States	26.2	2.2	2.5	0.0	0.0	2.0	2.3
Mexico	1.6	3.7	3.7	-2.1	-1.7	3.6	3.5
Latin American and Caribbean	7.2	2.2	3.3	-4.9	-1.0	7.3	7.4
Argentina	0.5	1.4	3.0	2.0	-3.6	12.5	10.4
Brazil	2.4	1.4	4.2	10.7	9.3	4.6	4.4
Europe	30.1	-0.2	0.2	3.3	5.4	2.5	1.9
Asia and Oceania	26.6	5.1	5.3	0.1	-0.5	2.5	2.3
China	7.5	7.5	8.1	-1.2	-1.3	2.7	2.5
Japan	8.8	1.5	0.7	0.6	3.3	0.2	-0.2
South Korea	2.0	2.2	3.1	-0.2	-5.7	3.2	2.5
Indonesia	0.8	6.0	6.2	5.1	-6.4	4.4	5.3
Vietnam	0.1	4.8	4.8	-2.3	8.5	6.2	5.0
India	2.3	5.6	6.3	6.0	-12.8	9.2	8.1
Australia	1.6	3.4	2.0	0.2	8.2	1.8	2.6
New Zealand	0.2	1.8	2.6	0.6	8.7	1.5	2.3
Middle East	3.2	3.2	3.6	-3.3	0.4	8.2	7.1
Turkey	0.8	2.8	4.3	-6.4	3.4	9.5	7.3
Africa	2.4	4.7	5.0	-2.1	-1.5	8.0	7.4

1/ Real values have a 2005 base year.

2/ Local currency per U.S. dollar. A negative growth rate indicates a depreciation of the dollar. (World is U.S.-trade-weighted estimate.)

Source: Calculations and compilation by Economic Research Service using data and forecasts from Global Insight, the IMF, and Oxford Economics.

Export Products

Fiscal 2013 grain and feed exports are forecast at \$37.1 billion, down \$1.9 billion from the August estimate, due to both lower volume and values across most grains, except some higher-value products. Coarse grain exports are forecast at \$11.6 billion, down \$1.4 billion, due to sluggish corn export sales and weakening prices amidst stiff foreign competition. Corn volume is forecast at 31.0 million tons, down 2.5 million. Feeds and fodders are down \$300 million largely due to lower exports of DDGS with strong domestic demand for feedstuffs.

Fiscal 2013 wheat exports are forecast at \$11.6 billion, a decrease of \$700 million from the August forecast due to lower prices and volume. Although prices are down somewhat, values are still high from an historical perspective and expected to remain strong through the summer months. Volume is down slightly as a result of higher competition from India, Russia, and Ukraine. Rice exports are up \$200 million to \$2.1 billion due to higher prices and volumes. Trade volume is up 0.2 million to 3.6 million tons with strong sales to South America.

Fiscal 2013 oilseed and product exports are forecast at \$31.4 billion, up \$3.3 billion from the August forecast, propelled by a 6.4-million ton (20 percent) rise in forecast soybean exports and continued record soybean and soybean meal prices. Early September rainfall from hurricane Isaac contributed to higher yields resulting in a significant rise in exportable supplies. Strong demand by China, coupled with limited South American competition has kept exports brisk while supporting prices at record levels. Soybean meal exports are forecast higher on strong demand and larger crush attributed to the increased crop.

Fiscal 2013 cotton exports are forecast at \$4.6 billion, down \$200 million from the August estimate. Unit value is unchanged, while export volume is forecast 100,000 metric tons lower, at 2.5 million tons. The decline in exports is in response to a slightly smaller U.S. crop and falling global import demand, primarily in China. High domestic support prices in China continue to weaken the spinning industry.

The fiscal 2013 export forecast for livestock, poultry, and dairy is lowered \$100 million to \$29.8 billion, with losses in poultry, beef, and cattle outweighing gains. Beef exports are forecast at \$4.8 billion, down \$150 million as marginally higher prices do not offset slightly lower volumes. Tight supplies on lower U.S. production constrain shipments despite strong global demand. Despite higher broiler meat exports, poultry exports are forecast down \$100 million to \$6.1 billion, due to lower unit values and volumes for turkey meat and poultry offals. Exports of dairy products are forecast higher by 4 percent to \$5 billion as stronger international prices are expected to offset lower volume sales, particularly of cheese, skim milk powder, and butterfat.

The fiscal 2013 export forecast for horticultural products is unchanged at a record \$32.0 billion. Fresh fruit and vegetable exports are forecast at a record \$7.6 billion. Exports to Canada, Europe and Japan are expected to continue expanding. Processed fruit and vegetable exports are forecast at \$7.4 billion. Unit values for several processed products are expected to continue rising with demand from major markets. Whole and processed tree nuts are forecast at \$7.0 billion.

Table 3--U.S. agricultural exports: Value and volume, by commodity, 2009-13

Commodity	Fiscal year				Forecast fiscal 2013	
	2009	2010	2011	2012	Aug.	Nov.
VALUE	-- Billion dollars --					
Grains and feeds 1/	26.278	27.233	37.987	33.404	39.0	37.1
Wheat 2/	5.997	5.855	11.494	8.353	12.3	11.6
Rice	2.250	2.305	2.134	1.988	1.9	2.1
Coarse grains 3/	9.982	9.818	13.987	11.736	13.0	11.6
Corn	9.279	9.070	12.901	11.240	12.1	10.7
Feeds and fodders	4.507	5.589	6.409	6.908	7.6	7.3
Oilseeds and products 4/	20.871	25.310	29.187	28.638	28.1	31.4
Soybeans	13.815	16.889	20.332	19.797	19.9	22.5
Soybean meal 5/	2.951	3.788	3.358	3.876	3.4	3.8
Soybean oil	0.855	1.348	1.733	0.830	0.7	0.7
Livestock, poultry, and dairy	18.632	21.544	27.336	29.825	29.9	29.8
Livestock products	11.526	13.561	17.365	18.499	18.9	18.7
Beef and veal 6/	2.688	3.220	4.555	4.770	5.0	4.8
Pork 6/	3.627	3.927	4.904	5.552	5.6	5.6
Beef and pork variety meats 6/	0.910	1.000	1.233	1.406	1.4	1.4
Hides, skins, and furs	1.507	2.116	2.625	2.764	2.9	2.8
Poultry and products	4.843	4.614	5.481	6.156	6.2	6.1
Broiler meat 6/ 7/	3.365	3.007	3.541	4.111	4.0	4.1
Dairy products	2.263	3.369	4.510	5.170	4.8	5.0
Tobacco, unmanufactured	1.199	1.223	1.116	1.052	1.1	1.1
Cotton	3.514	4.752	8.827	6.553	4.8	4.6
Seeds	1.247	1.230	1.370	1.468	1.5	1.5
Horticultural products 8/	20.634	22.626	25.911	28.644	32.0	32.0
Fruits and vegetables, fresh	5.414	5.869	6.643	6.996	7.6	7.6
Fruits and vegetables, processed 8/	5.379	5.608	6.309	6.840	7.4	7.4
Tree nuts, whole and processed	3.495	4.062	5.147	6.106	7.0	7.0
Sugar and tropical products 9/	3.879	4.573	5.483	6.198	7.3	7.3
Major bulk products 10/	36.757	40.843	57.891	49.479	53.0	53.5
Total	96.296	108.563	137.380	135.775	143.5	145.0
VOLUME	--- Million metric tons ---					
Wheat 2/	22.545	25.762	34.525	26.903	32.0	31.6
Rice	3.398	4.272	3.951	3.603	3.4	3.6
Coarse grains 3/	51.442	53.917	49.257	40.103	36.2	33.7
Corn	47.658	49.668	45.191	38.370	33.5	31.0
Feeds and fodders	13.830	18.849	18.889	17.540	18.7	17.2
Soybeans	34.947	41.588	40.290	38.397	30.2	36.6
Soybean meal 5/	7.708	10.124	8.238	8.837	6.4	7.2
Soybean oil	0.995	1.523	1.466	0.664	0.5	0.5
Beef and veal 6/	0.621	0.714	0.909	0.834	0.9	0.8
Pork 6/	1.382	1.428	1.644	1.837	1.8	1.8
Beef and pork variety meats 6/	0.684	0.712	0.823	0.754	0.8	0.7
Broiler meat 6/ 7/	3.107	2.957	3.196	3.299	3.1	3.2
Tobacco, unmanufactured	0.168	0.185	0.174	0.167	0.2	0.2
Cotton	2.737	2.680	3.014	2.716	2.6	2.5
Major bulk products 10/	115.237	128.403	131.210	111.889	104.6	108.2

Total may not add due to rounding.

1/ Includes corn gluten feed and meal and processed grain products. 2/ Excludes wheat flour. 3/ Includes corn, barley, sorghum, oats, and rye. 4/ Excludes corn gluten feed and meal. 5/ Includes soy flours made from protein meals. 6/ Includes chilled, frozen, and processed meats. 7/ Includes only federally inspected product. 8/ Includes juices. 9/ Includes coffee and cocoa products, tea, and spices. 10/ Includes wheat, rice, coarse grains, soybeans, cotton, and unmanufactured tobacco.

Source: Compiled by USDA using data from U.S. Census Bureau, U.S. Department of Commerce.

Regional Exports

Agricultural exports in fiscal 2013 are forecast at \$145 billion, which is \$9.2 billion above final fiscal 2012 exports of \$135.8 billion. The fiscal 2013 forecast is raised \$1.5 billion from the August forecast, with most of the increase expected in China, Indonesia, and the EU due to greater soybean demand.

Asia

Exports to China are forecast up \$700 million to \$21.2 billion. The soybean export value is expected up on strong Chinese demand coupled with high U.S. prices. Though the forecast is raised from the initial fiscal 2013 forecast issued in August, exports are expected down from the fiscal 2012 record of \$23.4 billion. Meat, dairy products, tree nuts, and soybean exports are expected to be strong in fiscal 2013, but corn and cotton shipments should fall from the records set last year. China is forecast to remain the top U.S. market ahead of Canada.

Japan is forecast up \$200 million from the August forecast primarily due to greater soybean unit values. In addition, corn exports are expected up from fiscal 2012 on slightly higher Japanese feed consumption. South Korea is also forecast up \$200 million on greater corn demand. In fiscal 2012, U.S. corn exports to South Korea were restrained by strong competition from other corn exporters. In addition, U.S. corn exports were replaced by Korean imports of Australian feed quality wheat and to a lesser extent, U.S. feed quality wheat. Indonesia is raised \$500 million as recent data reveals very strong shipments in the final months of fiscal 2012. This shipment pace is expected to continue strong, particularly for soybeans, which is the largest agricultural product shipped to Indonesia. Indonesia is now forecast even with fiscal 2012 exports of \$2.5 billion.

Western Hemisphere

The Western Hemisphere is unchanged at \$53.6 billion. The forecast for Mexico remains at \$19.0 billion. An expected increase in soybean exports is offset by a reduction in corn shipments. Greater corn supplies in Mexico from a production rebound and tighter U.S. supplies reduce sales prospects. Though Mexican import demand for corn is expected down, the United States should remain the dominant supplier.

Europe, Africa, and the Middle East

Exports to the EU are forecast up \$200 million due to both a greater volume of soybeans and higher soybean unit values. The sunflower seed and rapeseed crops in the EU are reduced from last year's levels, thereby increasing overall demand for imported soybeans. With the South American harvest still several months away, the United States will be the primary supplier and benefit from this increased demand at least until this coming spring.

Egypt is forecast down \$200 million from the August forecast due to increased competition from Russian and Ukrainian wheat supplies. However, the forecast for fiscal 2013 is still \$800 million greater than the total in fiscal 2012, in part due to expected greater wheat exports, especially after Black Sea supplies are exhausted in December.

Table 4--U.S. agricultural exports: Value by region, 2009-13

Country and region 1/	Fiscal year				Share of 2011 total	Forecast fiscal year 2013	
	2009	2010	2011	2012		Aug.	Nov.
		-- Billion dollars--			Percent	-- Billion dollars --	
Asia	37.628	45.660	58.908	60.382	44.5	60.1	61.6
East Asia	30.731	36.852	47.430	49.825	36.7	48.9	50.0
Japan	11.182	11.206	13.937	13.770	10.1	14.3	14.5
China	11.073	15.002	19.875	23.359	17.2	20.5	21.2
Hong Kong	1.737	2.460	3.225	3.381	2.5	4.0	4.0
Taiwan	2.889	3.175	3.609	3.093	2.3	3.6	3.6
South Korea	3.821	4.992	6.754	6.203	4.6	6.6	6.8
Southeast Asia	5.681	7.329	9.632	9.153	6.7	9.3	9.8
Indonesia	1.667	2.130	2.989	2.470	1.8	2.0	2.5
Philippines	1.247	1.606	2.014	2.304	1.7	2.4	2.4
Malaysia	0.562	0.788	0.938	0.876	0.6	1.2	1.2
Thailand	0.909	1.083	1.476	1.304	1.0	0.9	0.9
Vietnam	0.846	1.225	1.586	1.500	1.1	1.6	1.6
South Asia	1.216	1.479	1.846	1.404	1.0	1.8	1.8
India	0.601	0.797	0.695	0.764	0.6	0.8	0.8
Western Hemisphere	38.201	40.425	48.615	50.770	37.4	53.6	53.6
North America	28.866	30.532	36.260	38.898	28.6	40.0	40.0
Canada	15.541	16.597	18.617	20.008	14.7	21.0	21.0
Mexico	13.325	13.936	17.643	18.890	13.9	19.0	19.0
Caribbean	3.150	3.109	3.397	3.426	2.5	3.9	3.9
Dominican Republic	0.893	0.957	1.173	1.044	0.8	1.3	1.3
Central America	2.657	2.714	3.611	3.557	2.6	4.3	4.3
South America	3.528	4.069	5.348	4.889	3.6	5.4	5.4
Brazil	0.382	0.531	0.817	0.509	0.4	0.7	0.7
Colombia	0.955	0.830	1.199	0.843	0.6	0.8	0.8
Peru	0.432	0.735	0.855	0.581	0.4	0.7	0.7
Venezuela	1.050	1.073	1.235	1.527	1.1	1.7	1.7
Europe/Eurasia	9.919	10.264	12.371	11.293	8.3	12.5	12.7
European Union-27 2/	7.611	8.512	10.254	8.872	6.5	10.0	10.2
Other Europe 3/	0.549	0.375	0.469	0.470	0.3	0.4	0.4
FSU-12 4/	1.759	1.377	1.648	1.952	1.4	2.1	2.1
Russia	1.418	1.035	1.361	1.504	1.1	1.8	1.8
Middle East	4.863	5.570	7.931	5.804	4.3	7.9	7.9
Turkey	1.387	1.997	2.510	1.882	1.4	2.5	2.5
Saudi Arabia	0.686	0.836	1.223	1.135	0.8	1.1	1.1
Africa	4.286	4.950	7.660	5.681	4.2	8.0	7.8
North Africa	2.127	2.772	4.748	2.977	2.2	4.7	4.5
Egypt	1.421	1.569	2.974	1.785	1.3	2.8	2.6
Sub-Saharan Africa	2.159	2.178	2.912	2.704	2.0	3.3	3.3
Nigeria	0.844	0.876	1.315	1.076	0.8	1.3	1.3
Oceania	1.239	1.380	1.549	1.722	1.3	1.5	1.5
Trans-shipments via Canada 5/	0.160	0.315	0.346	0.122	0.1	0.3	0.1
Total	96.296	108.563	137.380	135.775	100.0	143.5	145.0

Total may not add due to rounding.

1/ Projections are based primarily on trend or recent average growth analysis.

2/ The former EU-25 plus Romania and Bulgaria which acceded in January 2007.

3/ Major countries include Switzerland, Norway, Iceland, and former Yugoslav States.

4/ The former 15 Republics of the Soviet Union minus the three Baltic Republics.

5/ Trans-shipments through Canada have not been allocated to final destination, but are included in the total.

Source: Compiled by USDA using data from U.S. Census Bureau, U.S. Department of Commerce.

Import Products

The slower U.S. economic growth is reducing the forecast for U.S. agricultural imports in fiscal 2013 from \$117 billion in August to \$115 billion. This value still represents a 11-percent increase from 2012's \$103.4 billion import bill, which is higher than 2012's 9.4-percent rise from 2011. The reduced forecast for 2013 is largely due to lower prices for tropical oils, processed fruits and vegetables, sugar, coffee, rubber, and cocoa. U.S. import demand for food is also weak as seen in zero growth in expenditures for food (consumed at home) from the second half of 2011 to the first half of 2012. This is in part the result of three consecutive declines in quarterly real personal disposable income in 2011. Higher food imports in fiscal 2012 were helped by a 3.2 percent growth in spending for food services.

Compared with 2012, sugar and tropical product imports are up \$4 billion and imported horticulture products are \$2.8 billion larger. The remaining import gains are posted by oilseeds and products (up \$1.3 billion), grains and feed (up \$2.1 billion), and livestock and dairy products (up \$900 million). Total U.S. agricultural imports grew by 12.2 percent annually on average during 2010-12, following the recession-induced decline in 2009. The corresponding average growth in import volume was 5.2 percent, which indicates that import prices rose over the past 3 years. However, the strong import volume expansion of 9 percent in 2012 (based on aggregate metric ton units), after 5 percent in 2011 and 1.5 percent in 2010, suggests a strengthening trend in real import demand in 2013. This scenario assumes no significantly higher taxes or large domestic spending cuts by the Government in 2013.

Although the sharpest forecast reductions are for sugar and tropical products, their gain from 2012 represents 38 percent of the overall \$10.6 billion additional imports expected in 2013. The downward adjustments from the previous projections are accounted for by lower prices for sugar, coffee beans, and natural rubber in 2012 from 2011. Tropical commodity prices peaked recently during the first two quarters of 2011 and have sharply declined since then. The U.S. import price for sugar fell from 38 cents per pound in October 2011 to 24 cents in October 2012. Imported coffee bean prices dropped from \$2.50 per pound to \$1.70 over the past year.

Lower tropical product prices also apply to coconut, palm, and palm kernel oils. Coconut oil prices dropped by more than \$300 per metric ton in the past year and by \$150 per metric ton for palm oil. While these prices appear to continue falling, the price of olive oil (extra virgin) is climbing sharply. Average prices of tropical oils are significantly lower between 2011 and 2012. These favorable lower import costs resulted in a 1.5-percent reduction in the U.S. import bill for tropical oils in 2012 despite a 6.2-percent rise in their import volume. Even if these prices continue to fall or stabilize, the sharp gain in olive oil price since July will partly offset their lower import cost.

Although reduced \$100 million from August, the beef import forecast for 2013 shows a 13-percent gain in import value over 2012 as domestic beef supplies tighten and demand for processing-type beef remains strong. Fewer cattle imports are expected in 2013 as cattle inventories in Mexico are lower and herds are rebuilt in Canada. However, the forecast is unchanged from August. The pork import estimate for 2013 is lowered \$30 million from the August forecast to \$1.3 billion because of relatively tight exportable

supplies in Canada, our top supplier. Similarly, expected swine imports are trimmed by \$24 million.

U.S. demand for imported grain products has continued to rise in fiscal 2013, with an additional \$500 million expected, and bulk grain imports are expected to jump by \$1.5 billion. With the U.S. corn crop hurt by drought in 2012, there is a strong incentive for East Coast pork and poultry producers to import corn from South America, especially during their harvest price lows, around April 2013. In 2012, import demand for grain products—wheat, wheat products, barley, oats, coarse grain products, and processed animal feeds—all posted greater volumes and unit values. In value, the top suppliers of grains and products to the United States are Canada (wheat, grain products, and feeds), Mexico (grain products), Thailand (rice), and China (animal feeds). Imported grains, grain products, and feeds are projected to total more than livestock and meat imports in 2013. Grains and feed products are also larger than oilseeds and products in import value. In fact, grain products, such as baked goods and snacks, will likely outpace vegetable oils in 2013 as tropical oil prices deflate and as wheat prices hover around \$360 per metric ton.

Lower prices for processed fruits and vegetables and for tree nuts are behind the reduced import forecasts for these products in 2013. Nevertheless, these high-value products (along with fresh fruits) posted positive growth in import volume and unit values in 2012, demonstrating continuing firm demand. Their combined estimate in 2013 amounts to more than \$740 million worth of additional imported products. The bulk of the \$2.8-billion growth in 2013 horticulture imports is attributed to expected \$800 million more fresh fruits and vegetables, \$600 million more wine and beer, and about \$200 million more essential oils and nursery products. For over two decades, the U.S. import value for horticultural crops and products has registered positive annual gains, except during the last recession in 2009.

Table 5—U.S. agricultural imports: Value and volume, by commodity, 2009-13

Commodity	Fiscal year				Forecast fiscal year	
	2009	2010	2011	2012	2013	
					Aug.	Nov.
VALUE						
--- Billion dollars ---						
Livestock and dairy products	10.682	10.844	11.847	13.281	14.1	14.2
Livestock and meats	7.615	7.949	8.620	9.653	10.3	10.3
Cattle and calves	1.360	1.517	1.451	1.668	1.3	1.3
Swine	0.332	0.344	0.355	0.347	0.4	0.4
Beef and veal	2.932	2.847	3.011	3.621	4.2	4.1
Pork	0.988	1.138	1.254	1.294	1.4	1.3
Dairy products	2.672	2.415	2.706	3.013	3.1	3.2
Cheese	1.044	0.963	1.061	1.060	1.1	1.1
Grains and feed	7.373	7.484	8.350	9.502	10.6	11.6
Grain products	4.521	4.885	5.384	5.749	6.2	6.2
Oilseeds and products	5.353	5.268	7.663	8.654	10.5	10.0
Vegetable oils	3.748	3.784	5.589	5.759	6.5	6.1
Horticulture products	33.017	35.558	39.405	41.557	45.3	44.4
Fruits, fresh	6.074	6.792	7.125	7.618	8.0	8.0
Fruits, processed	3.375	3.276	4.263	4.358	4.8	4.5
Fruit juices	1.414	1.280	1.840	1.762	2.0	1.9
Nuts, whole and processed	1.151	1.331	1.714	1.801	2.3	2.0
Vegetables, fresh	4.237	5.181	5.722	5.831	6.3	6.2
Vegetables, processed	3.483	3.573	3.915	4.202	4.9	4.6
Wine	4.084	4.258	4.777	5.084	5.4	5.4
Malt beer	3.428	3.452	3.512	3.722	4.0	4.0
Essential oils	2.406	2.434	2.534	2.569	2.6	2.7
Cut flowers and nursery stock	1.357	1.441	1.522	1.624	1.7	1.7
Sugar and tropical products	15.341	18.315	25.594	28.318	34.0	32.3
Sweeteners & products	3.286	4.112	5.077	5.223	6.0	5.5
Confections	1.173	1.279	1.391	1.461	1.6	1.6
Cocoa and chocolate	3.300	4.239	4.633	4.117	4.7	4.5
Coffee beans and products	4.148	4.389	7.337	7.789	9.0	8.3
Rubber, natural	1.569	2.433	4.430	3.791	4.8	4.4
Other imports 1/	1.639	1.492	1.648	2.061	2.5	2.5
Total agricultural imports	73.404	78.961	94.506	103.372	117.0	115.0
VOLUME						
--- Million metric tons ---						
Wine 2/	0.933	0.972	1.002	1.202	1.4	1.4
Malt beer 2/	3.121	3.112	3.159	3.287	3.3	3.3
Fruit juices 2/	4.399	4.163	4.407	3.591	3.8	3.8
Cattle and calves 3/	2.013	2.225	2.127	2.305	1.9	1.9
Swine 3/	6.976	5.805	5.703	5.779	5.7	5.5
Beef and veal	0.897	0.804	0.683	0.744	0.9	0.8
Pork	0.354	0.370	0.346	0.348	0.4	0.4
Fruits, fresh	8.478	9.101	9.266	9.599	9.6	10.0
Fruits, processed	1.364	1.408	1.481	1.502	1.6	1.6
Vegetables, fresh	4.559	5.378	5.513	5.696	6.1	5.9
Vegetables, processed	2.937	2.925	3.026	3.202	3.4	3.4
Vegetable oils	3.339	3.456	3.746	3.976	4.5	4.3
Cocoa and chocolate	1.148	1.242	1.328	1.246	1.4	1.3
Coffee beans	1.346	1.276	1.421	1.496	1.6	1.6

Totals may not add due to rounding.

1/ Largely tobacco and planting seeds. 2/ Liquid volume is in billion liters. 3/ Million head.

Sources: U.S. Department of Agriculture and U.S. Census Bureau, U.S. Department of Commerce.

Regional Imports

U.S. imports expanded the fastest from South and Southeast Asia in the past decade. Imports of tropical products (sugar, coffee, cocoa, rubber), vegetable oils (coconut, palm, palm kernel), fruits/vegetables/nuts, and grains (rice) topped the rankings. Processed fruit (apple juice) and vegetables and feeds are China's main exports. From India, the chief imports include food thickeners (mucilages), spices, cashew nuts, and essential oils. Indonesia is a key source of rubber, coffee, and coconut oil; Thailand supplies rubber, fruits, and rice.

From South and Central America, horticultural and tropical products are the principal imports. Among the top horticultural imports from South America are fresh fruits, fruit juices, wine, cut flowers, fresh and processed vegetables, and tree nuts. The major tropical products from South America are coffee, sugar, and cocoa. Beef and veal from Brazil, Uruguay, and Argentina are also a major import. Central America's largest exports to the United States are bananas, pineapples, melons, vegetables, coffee, and sugar.

Table 6--U.S. agricultural imports: Value by region, 2009-13

Region and country	Fiscal year				Forecast fiscal year		Share of total 2012
	2009	2010	2011	2012	2013		
					Aug.	Nov.	
VALUE	-- Billion dollars--				-- Billion dollars--		Percent
Western Hemisphere	40.087	42.871	50.814	55.2	63.1	61.8	53.7
Canada	15.354	15.682	17.946	20.0	23.1	23.0	20.0
Mexico	11.248	12.972	15.427	16.3	18.1	17.5	15.2
Central America	3.358	3.753	4.745	5.2	5.7	5.8	5.0
Costa Rica	1.128	1.238	1.433	1.5	1.6	1.6	1.4
Guatemala	1.292	1.381	1.766	2.0	2.3	2.3	2.0
Other Central America	0.938	1.134	1.546	1.7	1.8	1.9	1.7
Caribbean	0.525	0.577	0.589	0.6	0.7	0.7	0.6
South America	9.603	9.887	12.108	13.1	15.5	14.8	12.9
Argentina	1.188	1.087	1.493	1.7	2.1	2.0	1.7
Brazil	2.551	2.644	3.458	3.8	4.8	4.3	3.7
Chile	2.135	2.274	2.324	2.5	2.7	2.8	2.4
Colombia	1.771	1.852	2.343	2.3	2.5	2.5	2.2
Other South America	1.958	2.029	2.489	2.8	3.3	3.2	2.8
Europe and Eurasia	14.515	15.008	16.624	17.7	19.3	18.9	16.4
European Union-27 1/	13.642	14.171	15.658	16.6	18.1	17.7	15.4
Other Europe	0.793	0.773	0.902	1.0	1.1	1.1	1.0
Asia	12.040	14.055	19.021	22.2	24.9	24.8	21.6
East Asia	3.949	4.362	5.191	5.7	6.2	6.2	5.4
China	2.915	3.208	3.916	4.3	4.7	4.8	4.2
Other East Asia	1.034	1.154	1.275	1.3	1.4	1.4	1.2
Southeast Asia	6.627	8.052	11.385	10.9	12.7	12.3	10.7
Indonesia	1.999	2.631	3.954	3.7	4.3	4.0	3.5
Malaysia	1.480	1.604	2.286	2.0	2.4	2.3	2.0
Thailand	1.594	1.917	2.574	2.5	2.9	2.8	2.4
Other Southeast Asia	1.554	1.901	2.571	2.8	3.2	3.2	2.8
South Asia	1.465	1.640	2.445	5.6	6.0	6.3	5.5
India	1.319	1.498	2.251	5.4	5.7	6.0	5.2
Oceania	4.313	4.052	4.389	4.9	5.7	5.8	5.0
Australia	2.442	2.319	2.360	2.6	3.1	3.1	2.7
New Zealand	1.779	1.624	1.925	2.2	2.4	2.5	2.2
Africa	1.656	2.222	2.787	2.4	3.0	2.7	2.3
Sub-Saharan Africa	1.357	1.947	2.427	2.1	2.6	2.4	2.1
Ivory Coast	0.603	0.908	1.052	0.8	1.1	1.0	0.9
Middle East	0.792	0.754	0.872	0.9	1.0	1.0	0.9
Turkey	0.484	0.423	0.520	0.6	0.5	0.6	0.5
World total	73.404	78.961	94.506	103.4	117.0	115.0	100.0

Totals may not add due to rounding.

1/ The former EU-25 plus Romania and Bulgaria.

Sources: U.S. Department of Agriculture and U.S. Census Bureau, U.S. Department of Commerce.

Reliability Tables

Table 7--Reliability of quarterly U.S. export projections, by commodity and quarter

Commodity	Average forecast errors Fiscal 2012					Forecast accuracy Fiscal 2012					Forecast accuracy
	Aug. 2011	Nov. 2011	Feb. 2012	May 2012	Aug. 2012	Aug. 2011	Nov. 2011	Feb. 2012	May 2012	Aug. 2012	
Export value			<i>Percent</i>					<i>"X" if error < 5%</i>			<i>Percent</i>
Grains and feeds	17	6	2	4	4	-	-	X	X	X	60
Wheat	24	2	5	1	8	-	X	X	X	-	60
Rice	5	0	10	5	0	X	X	-	X	X	80
Coarse grains	34	21	16	11	4	-	-	-	-	X	20
Corn	30	19	16	12	4	-	-	-	-	X	20
Feeds and fodders	1	0	7	3	0	X	X	-	X	X	80
Oilseeds and products	1	9	13	8	3	X	-	-	-	X	40
Soybeans	2	6	13	9	4	X	-	-	-	X	40
Soybean meal	15	21	23	15	3	-	-	-	-	X	20
Soybean oil	13	0	13	13	0	-	X	-	-	X	40
Livestock, poultry, and dairy	9	6	2	1	1	-	-	X	X	X	60
Livestock products	4	1	3	2	2	X	X	X	X	X	100
Beef and veal	10	3	2	2	0	-	X	X	X	X	80
Pork	7	4	2	0	2	-	X	X	X	X	80
Beef and pork variety meats	7	7	7	0	7	-	-	-	X	-	20
Hides, skins, and furs	0	4	0	0	4	X	X	X	X	X	100
Poultry and products	15	11	6	2	2	-	-	-	X	X	40
Broiler meat	20	12	7	5	2	-	-	-	X	X	40
Dairy products	23	23	15	10	4	-	-	-	-	X	20
Tobacco, unmanufactured	9	0	0	18	0	-	X	X	-	X	60
Cotton	0	9	6	3	2	X	-	-	X	X	60
Planting seeds	13	7	7	7	0	-	-	-	-	X	20
Horticultural products	2	2	2	0	0	X	X	X	X	X	100
Fruits and vegetables, fresh	1	1	1	1	1	X	X	X	X	X	100
Fruits and veget., processed	1	1	1	1	1	X	X	X	X	X	100
Tree nuts	7	7	7	2	2	-	-	-	X	X	40
Sugar and tropical products	8	0	0	0	3	-	X	X	X	X	80
Major bulk products	13	1	3	1	1	-	X	X	X	X	80
Total agricultural exports	1	3	4	1	1	X	X	X	X	X	100
Average error & accuracy	10	6	7	5	2	38%	52%	48%	69%	93%	60
Export volume											
Wheat	12	5	6	8	6	-	X	-	-	-	20
Rice	3	6	8	3	0	X	-	-	X	X	60
Coarse grains	20	9	13	13	1	-	-	-	-	X	20
Corn	17	7	13	13	2	-	-	-	-	X	20
Feeds and fodders	13	11	2	2	3	-	-	X	X	X	60
Soybeans	1	6	8	6	3	X	-	-	-	X	40
Soybean meal	11	9	9	6	2	-	-	-	-	X	20
Soybean oil	0	0	29	29	14	X	X	-	-	-	40
Beef and veal	13	13	13	13	0	-	-	-	-	X	20
Pork	6	6	0	0	6	-	-	X	X	-	40
Beef and pork variety meats	13	13	13	0	0	-	-	-	X	X	40
Broiler meat	9	6	0	3	0	-	-	X	X	X	60
Tobacco, unmanufactured	0	0	0	0	0	X	X	X	X	X	100
Cotton	0	7	11	7	4	X	-	-	-	X	40
Major bulk products	10	0	0	4	1	-	X	X	X	X	80
Average error & accuracy	8	6	8	7	3	33%	27%	33%	47%	80%	44

- = Error exceeds 5 percent.

Table 8--Reliability of quarterly U.S. export projections, by country and quarter

Country/region	Average forecast errors Fiscal 2012					Forecast accuracy Fiscal 2012					Forecast accuracy
	Aug. 2011	Nov. 2011	Feb. 2012	May 2012	Aug. 2012	Aug. 2011	Nov. 2011	Feb. 2012	May 2012	Aug. 2012	
Export value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					
Asia	2	7	7	5	1	X	-	-	X	X	60
East Asia	6	12	11	7	3	-	-	-	-	X	20
Japan	5	2	2	1	1	-	X	X	X	X	80
China	19	27	27	21	10	-	-	-	-	-	0
Hong Kong	3	3	3	3	9	X	X	X	X	-	80
Taiwan	13	13	13	13	16	-	-	-	-	-	0
South Korea	5	5	11	11	6	X	X	-	-	-	40
Southeast Asia	9	9	4	2	1	-	-	X	X	X	60
Indonesia	20	20	12	4	8	-	-	-	X	-	20
Philippines	13	13	13	13	4	-	-	-	-	X	20
Malaysia	11	11	11	11	11	-	-	-	-	-	0
Thailand	15	15	0	0	15	-	-	X	X	-	40
Vietnam	0	0	0	0	0	1	1	X	X	X	100
South Asia	57	57	57	29	29	-	-	-	-	-	0
India	0	0	0	0	0	1	X	X	X	X	100
Western Hemisphere	5	5	4	1	1	X	X	X	X	X	100
North America	7	7	6	0	0	-	-	-	X	X	40
Canada	5	5	5	0	0	X	X	X	X	X	100
Mexico	10	10	7	1	1	-	-	-	X	X	40
Caribbean	0	0	6	12	6	X	X	-	-	-	40
Dominican Republic	20	20	20	20	20	-	-	-	-	-	0
Central America	3	3	3	3	6	X	X	X	X	-	80
South America	10	10	6	0	0	-	-	-	X	X	40
Brazil	40	40	40	40	0	-	-	-	-	X	20
Colombia	50	50	25	25	0	-	-	-	-	X	20
Peru	50	50	50	0	0	-	-	-	X	X	40
Venezuela	20	20	20	20	0	-	-	-	-	X	20
Europe and Eurasia	16	16	7	6	4	-	-	-	-	X	20
European Union-27	24	24	12	4	4	-	-	-	X	X	40
Other Europe	20	20	20	20	20	-	-	-	-	-	0
FSU-12	15	15	15	15	5	-	-	-	-	X	20
Russia	7	7	7	7	7	-	-	-	-	-	0
Middle East	24	7	7	7	9	-	-	-	-	-	0
Turkey	42	11	11	0	0	-	-	-	X	X	40
Saudi Arabia	9	27	27	9	9	-	-	-	-	-	0
Africa	32	16	9	18	12	-	-	-	-	-	0
North Africa	60	37	23	23	13	-	-	-	-	-	0
Egypt	39	11	0	0	0	-	-	X	X	X	60
Sub-Saharan Africa	0	7	7	11	11	X	-	-	-	-	20
Nigeria	18	0	0	0	0	-	1	X	X	X	80
Oceania	12	12	12	12	12	-	-	-	-	-	0
Transshipments via Canada	100	200	200	200	200	-	-	-	-	-	0
Average error and accuracy	19	20	17	14	11	24%	24%	26%	45%	52%	34

- = Error exceeds 5 percent.

Table 9--Reliability of quarterly U.S. import projections, by commodity and quarter

Commodity	Average forecast errors Fiscal 2012					Forecast accuracy Fiscal 2012					Forecast accuracy
	Aug. 2011	Nov. 2011	Feb. 2012	May 2012	Aug. 2012	Aug. 2011	Nov. 2011	Feb. 2012	May 2012	Aug. 2012	
Import value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Livestock, dairy, and poultry	5	6	2	1	1	X	-	X	X	X	80
Livestock and meats	4	6	3	0	1	X	-	X	X	X	80
Cattle and calves	18	12	6	12	6	-	-	-	-	-	0
Swine	33	33	33	33	33	-	-	-	-	-	0
Beef and veal	3	14	8	6	6	X	-	-	-	-	20
Pork	0	0	0	8	0	X	X	X	-	X	80
Dairy products	7	7	0	3	0	-	-	X	X	X	60
Cheese	9	0	0	0	9	-	X	X	X	-	60
Grains and feed	1	5	2	2	1	X	-	X	X	X	80
Grain products	5	2	4	4	4	-	X	X	X	X	80
Oilseeds and products	0	7	7	5	5	X	-	-	X	X	60
Vegetable oils	7	16	0	5	5	-	-	X	-	-	20
Horticulture products	6	4	4	2	1	-	X	X	X	X	80
Fruits, fresh	1	3	0	1	0	X	X	X	X	X	100
Fruits, preserved	23	20	14	5	2	-	-	-	X	X	40
Fruit juices	39	39	28	11	6	-	-	-	-	-	0
Nuts and preparations	22	22	17	11	11	-	-	-	-	-	0
Vegetables, fresh	5	5	7	5	3	-	-	-	-	X	20
Vegetables, processed	2	2	5	5	5	X	X	X	X	X	100
Wine	4	4	4	2	0	X	X	X	X	X	100
Malt beer	8	3	0	0	0	-	X	X	X	X	80
Essential oils	8	0	0	0	4	-	X	X	X	X	80
Cut flowers and nursery stock	0	0	0	0	0	X	X	X	X	X	100
Sugar and tropical products	0	5	10	10	7	-	-	-	-	X	20
Sweeteners and products	23	15	23	12	8	-	-	-	-	-	0
Confections	7	0	0	0	0	-	X	X	X	X	80
Cocoa and products	10	17	15	15	12	-	-	-	-	-	0
Coffee beans and products	10	9	15	19	8	-	-	-	-	-	0
Natural rubber	26	42	58	32	18	-	-	-	-	-	0
Other imports	10	14	19	5	0	-	-	-	X	X	40
Total agricultural imports	2	2	3	4	3	X	X	X	X	X	100
Average error and accuracy	10	10	9	7	5	35%	39%	55%	58%	65%	50
Import volume											
Wine (HL)	8	8	8	0	0	-	-	-	X	X	40
Malt beer (HL)	6	0	0	0	3	-	X	X	X	X	80
Fruit juices (HL)	31	31	25	0	0	-	-	-	X	X	40
Cattle and calves	9	13	13	17	4	-	-	-	-	X	20
Swine	2	2	0	0	0	X	X	X	X	X	100
Beef and veal	14	0	0	14	14	-	X	X	-	-	40
Pork	0	0	25	25	25	X	X	-	-	-	40
Fruits--fresh	0	1	1	3	2	X	X	X	X	X	100
Fruits--processed	20	13	7	0	0	-	-	-	X	X	40
Vegetables--fresh	2	2	2	2	2	X	X	X	X	X	100
Vegetables--processed	3	0	0	0	0	X	X	X	X	X	100
Vegetable oils	2	2	3	5	2	X	X	X	X	X	100
Cocoa and products	17	17	17	17	8	-	-	-	-	-	0
Coffee beans and products	13	7	7	0	0	-	-	-	X	X	40
Average error and accuracy	9	6	9	6	4	43%	57%	50%	71%	79%	60

- = Error exceeds 5 percent. HL = hectoliters.

Table 10--Reliability of quarterly U.S. import projections, by country and quarter

Country/region	Average forecast errors Fiscal 2012					Forecast accuracy Fiscal 2012					Forecast accuracy
	Aug. 2011	Nov. 2011	Feb. 2012	May 2012	Aug. 2012	Aug. 2011	Nov. 2011	Feb. 2012	May 2012	Aug. 2012	
Import value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Western Hemisphere	3	4	6	6	4	X	X	-	-	X	60
Canada	1	0	3	5	5	X	X	X	X	X	100
Mexico	8	10	6	3	1	-	-	-	X	X	40
Central America	4	4	8	4	0	X	X	-	X	X	80
Costa Rica	13	7	0	0	0	-	-	X	X	X	60
Guatemala	0	5	15	10	5	X	X	-	-	X	60
Other Central America	6	6	6	0	6	-	-	-	X	-	20
Caribbean	17	17	17	0	0	-	-	-	X	X	40
South America	2	3	9	13	8	X	X	-	-	-	40
Argentina	0	6	12	18	12	-	-	-	-	-	0
Brazil	0	3	16	29	16	X	X	-	-	-	40
Chile	4	4	0	0	0	X	X	X	X	X	100
Colombia	22	17	13	4	0	-	-	-	X	X	40
Other South America	4	0	4	7	7	X	X	X	-	-	60
Europe and Eurasia	4	1	1	2	1	X	X	X	X	X	100
European Union-27	5	1	1	2	1	X	X	X	X	X	100
Other Europe	0	0	0	0	0	X	X	X	X	X	100
Asia	4	3	2	1	2	X	X	X	X	X	100
East Asia	5	5	2	4	2	-	-	X	X	X	60
China	7	7	2	2	0	-	-	X	X	X	60
Other East Asia	8	8	8	0	0	-	-	-	X	X	40
Southeast Asia	18	18	19	17	6	-	-	-	-	-	0
Indonesia	19	19	27	24	5	-	-	-	-	-	0
Malaysia	35	35	30	25	10	-	-	-	-	-	0
Thailand	16	16	16	8	4	-	-	-	-	X	20
Other Southeast Asia	4	4	0	7	4	X	X	X	-	X	80
South Asia	54	52	45	25	2	-	-	-	-	X	20
India	57	54	46	26	4	-	-	-	-	X	20
Oceania	2	2	4	0	6	X	X	X	X	-	80
Australia	0	4	8	4	8	X	X	-	X	-	60
New Zealand	5	0	0	0	0	X	X	X	X	X	100
Africa	21	25	17	13	13	-	-	-	-	-	0
Sub-Saharan Africa	24	29	19	14	14	-	-	-	-	-	0
Ivory Coast	25	50	25	38	25	-	-	-	-	-	0
Middle East	11	11	11	11	0	-	-	-	-	X	20
Turkey	0	0	17	17	17	X	X	-	-	-	40
Average error & accuracy	11	12	12	9	5	47%	47%	36%	50%	61%	48

- = Error exceeds 5 percent.



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Contact Information

Forecast Coordinators (area code 202)

Exports: Oliver Flake/FAS, 720-1226, Oliver.Flake@fas.usda.gov
Imports: Andy Jerardo/ERS, 694-5266, ajerardo@ers.usda.gov

Commodity Specialist Contacts (area code 202)

Grains and Feeds:

Coarse Grains: Edward W. Allen/ERS, 694-5288
Rich ard O'Meara/FAS, 720-4933

Wheat: Edward W. Allen/ERS, 694-5288
Teresa McKeivier/FAS, 690-1151

Rice: Nathan Childs/ERS, 694-5292
Debbie Rubas/FAS, 720-1073

Oilseeds: Mark Ash/ERS, 694-5289
Bill George/FAS, 720-6234

Cotton: James Johnson/FAS, 690-1546
Leslie Meyer/ERS, 694-5307

Livestock, Poultry & Dairy Products:

Beef & Cattle: Claire Mezoughem/FAS, 720-7715

Pork & Hogs: Leslie Ahmed/FAS, 720-2781

Poultry: Dave Harvey/ERS, 694-5177
Lazaro Sandoval/FAS, 690-8478

Dairy Products: Paul Kiendl/FAS, 720-8870

Horticultural & Tropical Products:

Deciduous Fresh Fruit: Meyra Mendoza-Reeder/FAS, 720-0262

Fresh Citrus: Reed Blauer/FAS, 720-0898

Vegetables & Preparations: Andy Sowell/FAS, 720-0262

Tree Nuts: Tony Halstead/FAS, 690-4620

Sugar and Tropical Products: Reed Blauer/FAS, 720-0898
Sugar: Ron Lord/FAS, 720-6939

Macroeconomics Contact (area code 202)

David Torgerson/ERS, 694-5334, dtorg@ers.usda.gov

Publication Coordinator (area code 202)

Stephen MacDonald/ERS, 694-5305, stephenm@ers.usda.gov

Related Websites

Outlook for U.S. Agricultural Trade

<http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1196>

Foreign Agricultural Service homepage: <http://www.fas.usda.gov/>

Economic Research Service homepage: <http://www.ers.usda.gov/>

U.S. Trade Data: <http://www.fas.usda.gov/gats>

FAQ & Summary Data: [http://www.ers.usda.gov/data-products/foreign-agricultural-trade-of-the-united-states-\(fatus\).aspx](http://www.ers.usda.gov/data-products/foreign-agricultural-trade-of-the-united-states-(fatus).aspx)

Articles on U.S. Trade: <http://www.ers.usda.gov/topics/international-markets-trade/us-agricultural-trade.aspx>

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