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*Electronic Outlook Report from USDA's  
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## Outlook for U.S. Agricultural Trade

### FY 2014 Export Forecast Rises \$5.6 Billion to Record-High \$142.6 Billion

The fiscal 2014 forecast for agricultural exports is revised up from the December estimate by \$5.6 billion to a record \$142.6 billion. The forecast for grain and feed exports is boosted \$3.2 billion from December to \$31.3 billion on greater volumes of wheat, corn, and feeds and fodders. Corn jumps by \$1.2 billion to \$8.6 billion as strong import demand from Mexico, South Korea, and Europe more than offsets lower sales to China. Oilseed and product exports are forecast at \$31.4 billion, up \$2.6 billion, driven by record soybean and near-record soybean meal exports. The soybean export forecast is raised \$1.8 billion to \$21.7 billion as strong demand from China and limited competition to date from South America add to both volume and unit value. Higher unit values have increased the cotton export forecast by \$100 million to \$4.4 billion. The export forecast for livestock, poultry, and dairy is lowered by \$200 million to \$31.6 billion, with reductions to poultry, pork, and other livestock products outweighing gains to dairy and beef. The horticultural product exports remain unchanged from the record December forecast of \$34.5 billion.

U.S. agricultural imports for fiscal year 2014 are forecast at \$110 billion, which is up slightly from the December estimate. This forecast is 5.9 percent greater than the fiscal 2013 import total. The estimate is consistent with a moderate recovery of import demand. The forecast trade balance in fiscal 2014 is up \$5.1 billion from December to \$32.6 billion, but still trails the fiscal 2013 surplus of \$37.1 billion.

Table 1--U.S. agricultural trade, fiscal years 2008-14, year ending September 30

Item	2008	2009	2010	2011	2012	2013	Forecast fiscal year	
							2014	
							Dec.	Feb.
<i>Billion dollars</i>								
Exports	114.9	96.3	108.5	137.4	135.8	140.9	137.0	142.6
Imports	79.3	73.4	79.0	94.5	103.4	103.8	109.5	110.0
Balance	35.6	22.9	29.5	42.9	32.4	37.1	27.5	32.6

Reflects forecasts in the February 10, 2014, *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  
May 29, 2014.

Approved by the  
World Agricultural  
Outlook Board.

### *World Growth Expected to be Up in 2014 and U.S. Dollar to Strengthen*

World growth, at 2.1 percent in 2013, is projected to rise to 3.2 percent in 2014. Trade growth, estimated at 2.8 percent in 2013, is expected to be 5 percent in 2014, and the primary support of higher world growth in 2014. Asian gross domestic product (GDP) growth, at over 4.4 percent in 2013, will rise to 4.9 percent in 2014. China and other emerging Asian economies, in pursuing policies of more consumer-oriented and sustainable growth, have become less export dependent. Developing Asia is seeing stronger domestic demand growth, triggered by higher wages and easier credit. Countries such as China, concerned that growth in real estate prices has boosted inflation, instructed monetary authorities to slow credit expansion. As a result, China is expecting a modest slowdown in GDP growth to 7.4 percent in 2014. Several other economies in Asia, such as the Philippines, are slated to see slower growth. However, Japan, South Korea, Malaysia, India, Thailand, Vietnam, Oceania, and smaller economies in the continent are expecting stronger growth in 2014.

Stronger Western Hemispheric and European economies will further boost world growth in 2014. In particular, North American growth is expected to move up in 2014 as the U. S. recovery accelerates in 2014. The United Kingdom is projected to be the growth leader in Western Europe. The Latin American growth pick-up in 2014 comes with improved prospects for Chile, Mexico, and smaller Latin economies, which offset slowdowns in Argentina and Brazil. Europe is expected to come back from recession as its economy moves from little change in 2013 to a gain of 1.6 percent in 2014.

World trade growth's acceleration in 2014 comes as a speedup of North American, Japanese, and Latin American export growth boosts trade to and from other areas. The dollar is projected to appreciate 1.3 percent in 2014 on top of 2013's gain. The U.S. stock market boom in 2013 was a reflection of the appeal of U.S. assets. Nevertheless, the continued low value of the dollar, compared to 2000-10; a lowered cost of production in manufacturing and agriculture, thanks to cheaper energy; and higher growth in Europe and Latin America will combine to further support U.S. farm and manufacturing export growth in 2014. The stronger U.S. economy in 2014 will lift U.S. import demand even as U.S. exports rise, providing a boost to world growth beyond North America.

The main risk to higher world growth in 2014 would be a BRIC (Brazil, Russia, India, and China) growth slowdown from increased credit tightening, especially in China. Most analysts regard such events as low probability over the next year.

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

Region/country	Share of world GDP (2012)	Income		Real exchange rate 2/		Prices	
		2013	2014	2013	2014	2013	2014
		Growth rate				Growth rate	
World (U.S. trade-weighted)	100.0	2.1	3.2	1.2	1.3	2.1	2.3
NAFTA	29.6	1.8	3.0	0.0	0.3	1.6	1.8
Canada	2.3	1.6	2.3	3.6	4.3	0.9	1.3
United States	25.4	1.9	3.0	0.0	0.0	1.5	1.7
Mexico	1.9	1.4	3.7	-5.1	-1.3	3.8	3.6
Latin American and Caribbean	6.7	2.3	2.9	1.8	7.8	5.5	5.4
Argentina	0.5	4.7	1.5	10.4	38.2	10.6	11.0
Brazil	2.2	2.2	1.7	5.8	8.7	6.2	6.0
Chile	0.3	4.2	4.5	1.1	4.1	1.8	3.0
Europe	28.7	0.1	1.6	-3.7	2.9	1.4	1.1
Asia and Oceania	28.2	4.4	4.9	8.1	1.2	2.7	3.4
China	7.5	7.7	7.4	-3.6	-5.5	2.6	3.2
Japan	8.8	1.7	1.9	23.7	7.5	0.4	2.2
South Korea	2.0	2.8	3.3	-2.6	-1.8	1.3	2.0
Indonesia	0.8	5.7	5.5	5.9	7.5	7.0	6.4
Malaysia	0.4	4.5	4.8	1.2	-0.7	1.9	3.0
Philippines	0.3	6.5	6.3	-0.6	-0.3	2.8	3.7
Thailand	0.4	2.6	3.4	-2.0	5.8	2.2	2.4
Vietnam	0.2	5.1	5.6	-4.0	-2.3	6.6	6.5
India	2.6	4.7	4.9	0.0	1.8	11.0	9.0
Australia	1.7	2.3	2.9	13.0	-1.6	2.4	2.7
New Zealand	0.2	2.8	3.1	-0.3	0.0	1.1	1.5
Middle East	3.8	2.8	3.6	1.0	0.6	6.9	7.3
Turkey	1.2	4.2	3.9	0.1	9.2	7.5	6.8
Africa	2.5	5.0	4.9	-1.6	-0.9	8.7	7.8

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 USDA, Economic Research Service using data and forecasts from Global Insight, the IMF, and Oxford Economics.

## Export Products

The fiscal 2014 forecast for grain and feed exports is boosted \$3.2 billion from December to \$31.3 billion on greater volumes of wheat, corn, and feeds and fodders. In addition, nearly all other categories are raised from last quarter. Feeds and fodders and products are higher, principally because of greater volumes of distiller's dried grains (DDGS) to China, but also supported by higher corn prices. Corn jumps by \$1.2 billion to \$8.6 billion as strong import demand from Mexico, South Korea, and Europe more than offsets lower sales to China. Combined with less competition from Argentina, U.S. corn exports are increased 5.0 million tons. Sorghum value is nearly unchanged; strong demand from China is supporting unit values but is offset by slower sales to Mexico as that country switches to more competitively priced corn.

Wheat exports are up \$600 million to \$7.8 billion on larger volume. Logistical issues in Canada and a restrictive export policy in Argentina are creating opportunities to expand U.S. exports.

Rice exports are up \$100 million to \$2.2 billion based on higher prices for medium and short grain rice on concerns over the California drought. Volume is up 100,000 tons to 3.7 million on strong shipments to the Middle East.

Fiscal 2014 oilseed and product exports are forecast at \$31.4 billion, up \$2.6 billion from the December estimate, driven by record soybean and near-record soybean meal exports. The soybean export forecast is raised \$1.8 billion to \$21.7 billion as strong demand from China is resulting in higher prices. Soybean meal exports are raised \$850 million to \$5.1 billion as strong foreign demand and lagging Argentine sales have afforded additional export opportunities at higher-than-expected prices. The soybean oil export forecast is up \$90 million to \$609 million as volume gains more than offset lower prices.

Fiscal 2014 cotton exports are forecast at \$4.4 billion, up \$100 million from the December estimate due to higher unit values. World market prices have exceeded expectations as short-term limitations on global free supplies have outweighed concerns about potential drawdown of China's surplus stock. The export volume forecast is unchanged at 2.3 million tons.

The fiscal 2014 export forecast for livestock, poultry, and dairy is lowered \$200 million to \$31.6 billion, with reductions to poultry, pork, and other livestock products outweighing gains to dairy and beef. Beef exports are raised about \$300 million to \$5.3 billion on higher volumes, while unit values are unchanged. Despite tight supplies and elevated prices, continued expansion in Asia will bolster shipments. Dairy exports are up \$400 million to \$6.3 billion as strong global demand continues to support high prices. Poultry exports are down \$100 million to \$6.3 billion, primarily due to lower unit values for broilers. Pork exports are lowered \$100 million to \$5.4 billion as tight supplies and high prices reduce competitiveness.

The fiscal 2014 export forecast for horticultural products is a record \$34.5 billion, unchanged from the December estimate though subcategories have been revised. The fresh fruit and vegetable forecast is lowered \$200 million to \$7.9 billion on slightly lower-than-anticipated volumes to Mexico and Europe. The processed fruit and vegetable forecast is reduced \$300 million to \$7.7 billion on lower volumes to

Canada, Mexico, and Japan. The whole and processed tree nut forecast is revised up \$600 million to \$8.4 billion due to a combination of higher unit values and increased shipments to Europe and China. The sugar and tropical product category forecast is unchanged at \$6.9 billion.

Table 3—U.S. agricultural exports: Value and volume, by commodity, 2013-14

Commodity	October - December		Fiscal year 2013	Forecast fiscal year 2014	
	2013	2014		Dec.	Feb.
<b>VALUE</b>					
<i>-- Billion dollars --</i>					
Grains and feeds 1/	6.904	8.413	31.300	28.1	31.3
Wheat 2/	1.571	1.945	10.086	7.2	7.8
Rice	0.612	0.559	2.235	2.1	2.2
Coarse grains 3/	1.704	2.480	6.194	8.3	9.6
Corn	1.512	2.333	5.574	7.4	8.6
Feeds and fodders	1.903	2.255	8.246	6.1	7.2
Oilseeds and products	15.122	15.313	32.058	28.8	31.4
Soybeans	11.702	12.271	20.887	19.9	21.7
Soybean meal 4/	1.787	1.747	5.475	4.2	5.1
Soybean oil	0.470	0.235	1.148	0.5	0.6
Livestock, poultry, and dairy	7.736	8.365	31.491	31.8	31.6
Livestock products	4.893	4.960	18.868	19.4	19.0
Beef and veal 5/	1.230	1.450	5.207	5.0	5.3
Pork 5/	1.421	1.388	5.170	5.5	5.4
Beef and pork variety meats 5/	0.402	0.388	1.495	1.5	1.4
Hides, skins, and furs	0.604	0.678	3.056	3.3	3.1
Poultry and products	1.638	1.607	6.496	6.4	6.3
Broiler meat 5/ 6/	1.095	1.042	4.303	4.2	4.1
Dairy products	1.205	1.797	6.126	5.9	6.3
Tobacco, unmanufactured	0.411	0.357	1.196	1.1	1.1
Cotton	0.962	0.950	5.600	4.3	4.4
Seeds	0.484	0.504	1.598	1.4	1.4
Horticultural products 7/	8.646	9.510	31.352	34.5	34.5
Fruits and vegetables, fresh	1.856	1.990	7.330	8.1	7.9
Fruits and vegetables, processed 7/	1.789	1.898	7.146	8.0	7.7
Tree nuts, whole and processed	2.626	3.085	7.162	7.8	8.4
Sugar and tropical products 8/	1.612	1.640	6.295	6.9	6.9
Major bulk products 9/	16.962	18.561	46.199	42.9	46.8
Total	41.889	45.055	140.936	137.0	142.6
<b>VOLUME</b>					
<i>--- Million metric tons ---</i>					
Wheat 2/	4.347	6.313	30.992	26.1	28.4
Rice	1.080	0.967	3.867	3.6	3.7
Coarse grains 3/	5.277	11.050	20.458	40.8	45.2
Corn	4.628	10.400	18.189	36.0	41.0
Feeds and fodders	4.262	5.730	18.740	17.1	21.0
Soybeans	19.223	23.312	35.020	39.5	41.1
Soybean meal 4/	3.145	3.367	10.083	9.3	9.9
Soybean oil	0.402	0.236	0.982	0.5	0.7
Beef and veal 5/	0.204	0.226	0.835	0.8	0.8
Pork 5/	0.472	0.451	1.694	1.8	1.7
Beef and pork variety meats 5/	0.200	0.195	0.752	0.7	0.7
Broiler meat 5/ 6/	0.855	0.850	3.346	3.4	3.4
Tobacco, unmanufactured	0.056	0.050	0.165	0.2	0.1
Cotton	0.506	0.435	2.860	2.3	2.3
Major bulk products 9/	30.489	42.127	93.362	112.5	120.9

Totals 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/ Includes soy flours made from protein meals. 5/ Includes chilled, frozen, and processed meats.

6/ Includes only federally inspected product. 7/ Includes juices. 8/ Includes coffee and cocoa products, tea, and spices.

9/ 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 2014 are at a record \$142.6 billion, which is \$5.6 billion higher than the December forecast and \$1.7 billion above final fiscal 2013 exports. China, Southeast Asia, South America, and the EU account for most of the increase from last quarter.

### *Asia*

Exports to **China** are forecast up \$3.5 billion to a record \$25.0 billion. The soybean export value is expected up on strong Chinese demand coupled with higher U.S. prices. Greater volumes of DDGS shipments, combined with strong demand for sorghum, tree nuts, and dairy, also helped boost the export forecast. First-quarter (October through December) exports to China set a new record and are 23 percent ahead of the same period a year ago. China is once again forecast to be the top U.S. market.

**Hong Kong** is forecast up \$300 million from the December forecast to \$3.6 billion, primarily due to greater beef shipments. **Indonesia** is increased \$300 million to \$2.7 billion on the strength of soybeans and dairy exports. **The Philippines** is raised \$200 million to a record \$2.6 billion based on strong wheat and dairy sales. **Vietnam** is up \$200 million to \$2.1 billion, largely due to higher exports of soybean meal, tree nuts, and dairy.

### *Western Hemisphere*

**Brazil** is forecast up \$400 million to \$1.1 billion, mostly due to stronger demand for U.S. wheat, diminished foreign supplies, and issues with domestic quality. **Colombia** and **Peru** are each raised \$200 million as a result of strong corn shipments.

### *Europe, Africa, and the Middle East*

Exports to the **EU** are forecast up \$400 million to \$10.5 billion due to robust demand for tree nuts and corn.



Table 4--U.S. agricultural exports: Value by region, 2013-14

Country and region 1/	October - December		Fiscal year 2013	Share of 2013 total	Forecast fiscal year 2014	
	2013	2014			Dec.	Feb.
	<i>-- Billion dollars --</i>			<i>Percent</i>	<i>-- Billion dollars --</i>	
Asia	20.364	22.823	60.004	42.6	58.6	63.1
East Asia	17.268	19.441	47.943	34.0	46.4	50.2
Japan	3.226	2.959	12.406	8.8	13.1	13.1
China	10.236	12.639	23.477	16.7	21.5	25.0
Hong Kong	1.242	1.465	3.629	2.6	3.3	3.6
Taiwan	1.055	0.959	3.185	2.3	3.3	3.3
South Korea	1.502	1.415	5.223	3.7	5.2	5.2
Southeast Asia	2.666	3.047	10.319	7.3	10.2	10.9
Indonesia	0.537	0.747	2.614	1.9	2.4	2.7
Philippines	0.600	0.710	2.399	1.7	2.4	2.6
Malaysia	0.266	0.275	1.022	0.7	0.9	0.9
Thailand	0.486	0.451	1.445	1.0	1.4	1.4
Vietnam	0.579	0.642	2.065	1.5	1.9	2.1
South Asia	0.429	0.335	1.741	1.2	2.0	2.0
India	0.304	0.196	0.970	0.7	1.0	1.0
Western Hemisphere	13.688	14.092	53.327	37.8	52.7	53.5
North America	10.163	10.253	39.335	27.9	40.2	40.2
Canada	5.396	5.304	21.419	15.2	21.6	21.6
Mexico	4.767	4.949	17.916	12.7	18.6	18.6
Caribbean	1.005	0.885	3.649	2.6	3.7	3.7
Dominican Republic	0.352	0.323	1.132	0.8	1.1	1.1
Central America	0.928	0.985	3.307	2.3	3.2	3.2
South America	1.592	1.969	7.035	5.0	5.6	6.4
Brazil	0.138	0.488	1.557	1.1	0.7	1.1
Colombia	0.429	0.525	1.412	1.0	1.4	1.6
Peru	0.131	0.166	0.666	0.5	0.5	0.7
Venezuela	0.422	0.366	1.602	1.1	1.5	1.5
Europe/Eurasia	4.351	4.588	13.992	9.9	12.4	12.8
European Union-28 2/	3.528	3.850	11.536	8.2	10.1	10.5
Other Europe 3/	0.162	0.177	0.652	0.5	0.7	0.7
FSU-12 4/	0.662	0.561	1.804	1.3	1.6	1.6
Russia	0.521	0.413	1.316	0.9	1.3	1.3
Middle East	1.709	1.857	6.311	4.5	6.0	6.0
Turkey	0.621	0.587	2.182	1.5	1.9	1.9
Saudi Arabia	0.335	0.359	1.132	0.8	1.1	1.1
Africa	1.292	1.185	5.441	3.9	5.6	5.6
North Africa	0.668	0.594	2.776	2.0	2.9	2.9
Egypt	0.351	0.335	1.668	1.2	1.8	1.8
Sub-Saharan Africa	0.624	0.591	2.665	1.9	2.7	2.7
Nigeria	0.211	0.194	1.104	0.8	1.1	1.1
Oceania	0.486	0.509	1.861	1.3	1.8	1.8
Trans-shipments via Canada 5/	0.000	0.000	0.000	0.0	0.0	0.0
<b>Total</b>	<b>41.889</b>	<b>45.055</b>	<b>140.936</b>	<b>100.0</b>	<b>137.0</b>	<b>142.6</b>

Totals may not add due to rounding.

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

2/ The former EU-27 and Croatia, which acceded in July 2013.

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

4/ The former 15 Republics of the Soviet Union, not including the 3 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

U.S. agricultural imports for fiscal 2014 are forecast to be \$110 billion, which is \$500 million more than the preceding forecast and 5.9 percent higher than that of 2013. This projected growth rate is brisker than the 0.5-percent rate in 2013 but slower than the 9.4-percent increase in 2012. Nevertheless, this expected pace is consistent with a moderate recovery of import demand, which reflects the anticipated 3-percent expansion of the domestic economy this year. Despite a lower unemployment rate, personal consumption spending has not exhibited a vigorous pace as personal disposable income grew by less than 1 percent from October to December 2013 (lower than 3 percent last summer and 4 percent last spring). For all of 2013, personal disposable income was flat (in chained 2009 dollars). Furthermore, the numerous snow storms and severe cold weather in many parts of the country during January and February 2014 are also contributing to weak consumer spending. Indeed, the U.S. import volume for food and farm products in the first quarter of this fiscal year declined by 0.8 percent from the same quarter in 2013.

A number of important commodities had lower import prices in 2013 than in 2012, including coffee beans, palm oil, natural rubber, and sugar. These price declines were largely responsible for the minuscule 0.5-percent growth in total import value in 2013, despite an 11-percent jump in import volume. However, higher prices for other key imports, including cocoa beans, chocolate, coconut oil, and olive oil, partly offset those price declines last year. More stable food commodity prices are expected in 2014 at levels largely comparable to prices in 2013. Thus, the projected 6-percent U.S. import growth for 2014 is mostly attributed to moderately larger shipment volumes.

The lower average prices of tropical commodities in 2013 reduced the forecast for imported sugar and tropical products to \$24.5 billion (from the previous estimate of \$25.3 billion) in 2014. This \$800-million drop, however, is more than offset by the \$500-million upward adjustment of imported oilseed products, including olive and tropical oils, and \$600-million increase in horticulture imports. Higher prices for olive and coconut oils largely offset lower prices for palm oil. Among other tropical commodities, higher cocoa bean prices are expected to partly offset the lower sugar, coffee, and rubber prices' effects on their import values.

With respect to horticultural products, higher import values are expected for beer and fresh fruits (based on bigger volume shipments to date for beer and higher unit values for fresh fruits). The smaller import projection for fruit juices is due to declines in both volume and unit value as domestic apple juice production is up this marketing year. For horticultural products as a group, import volume was up 3.7 percent and unit values were up 2.5 percent on average in the first quarter. Positive changes for these general indicators of consumer demand signal larger import values for horticultural products in 2014, which accounted for almost 43 percent of total import value in 2013.

The outlook for processed grain products is raised from \$6.7 to \$6.9 billion based on larger first-quarter volumes and unit values, including those for wheat and bakery products. This gain pushes up the projection for total grains and feeds from \$9.3 to \$9.5 billion despite smaller bulk grain and processed feed imports to date. Compared to 2013, however, total imported grains and feeds are forecast to be

lowered by \$1.8 billion due to lower volumes and unit values for bulk grains and feeds. Bulk corn imports are down sharply to date, while bulk wheat, rice, and oats are up. The projection for imported oilseeds and oilseed products is adjusted upward due to higher olive and coconut oil prices, as well as greater import volumes to date—particularly of soybeans and rapeseed.

The \$15-billion projection for imported livestock products in 2014 is \$400 million higher than the December forecast and \$1.3 billion more than in 2013. This represents a 9-percent gain from 2013 for all animal products. Growth in cattle imports from Mexico and Canada will be limited by tight supplies expected. Beef imports in 2014 are raised to 757,000 tons despite continued strong demand in a number of foreign export markets, especially from Asia. The \$4-billion projected import value for beef and veal represents an 8-percent gain from 2013 fueled by strong demand for processing meat and higher prices.

The long-term picture for U.S. agricultural imports is tied to population growth, income levels, price changes, and taste preferences. Population growth is now around 0.7 percent per year, half of the pace of two decades ago. This slowing factor may partially be offset by food taste preferences that favor foreign products. However, the purchasing power of consumers is influenced by price changes in foreign markets as well as by the exchange value of the U.S. dollar. Although the domestic supply of food products has an inverse effect on import demand, their prices have a direct effect. As the United States recovers faster than other economies, personal income and the dollar will likely appreciate relative to other countries and boost U.S. purchasing power. U.S. import volume is then expected to rise relative to import unit values (assuming no other market changes occur). In the long-term USDA projections to 2023, U.S. agricultural imports are forecast to grow at an average annual rate of 3.7 percent.

Table 5--U.S. agricultural imports: Value and volume, by commodity, 2013-14

Commodity	October - December		Fiscal year 2013	Forecast fiscal year 2014	
	2013	2014		Dec.	Feb.
<b>VALUE</b>					
--- Billion dollars ---					
Livestock and dairy products	3.412	3.593	13.742	14.6	15.0
Livestock and meats	2.414	2.557	10.091	10.7	11.0
Cattle and calves	0.534	0.535	1.808	1.9	2.0
Swine	0.078	0.078	0.329	0.3	0.3
Beef and veal	0.778	0.860	3.679	3.9	4.0
Pork	0.343	0.389	1.416	1.5	1.5
Dairy products	0.841	0.861	2.998	3.1	3.2
Cheese	0.358	0.354	1.148	1.3	1.3
Grains and feed	2.942	2.847	11.281	9.3	9.5
Grain products	1.576	1.684	6.175	6.7	6.9
Oilseeds and products	2.117	2.177	8.833	8.9	9.4
Vegetable oils	1.266	1.304	5.231	5.5	5.8
Horticulture products	10.409	11.063	44.115	48.1	48.7
Fruits, fresh	1.762	2.001	8.343	9.1	9.4
Fruits, processed	1.187	1.096	4.714	5.3	5.1
Fruit juices	0.512	0.443	1.894	2.1	1.8
Nuts, whole and processed	0.469	0.533	1.811	2.0	2.1
Vegetables, fresh	1.432	1.634	6.540	7.2	7.2
Vegetables, processed	1.098	1.086	4.220	4.4	4.3
Wine	1.447	1.443	5.356	5.8	5.8
Malt beer	0.766	0.870	3.581	3.7	4.1
Essential oils	0.621	0.695	2.789	3.2	3.2
Cut flowers and nursery stock	0.383	0.392	1.666	1.8	1.8
Sugar and tropical products	5.705	5.230	23.460	25.3	24.5
Sweeteners & products	1.161	1.090	4.611	4.9	4.6
Confections	0.378	0.406	1.541	1.9	1.7
Cocoa and chocolate	0.992	1.057	4.020	4.2	5.0
Coffee beans and products	1.461	1.215	6.057	6.4	6.0
Rubber, natural	0.701	0.585	2.673	3.0	2.8
Other imports <sup>1/</sup>	0.462	0.516	2.414	3.4	2.8
Total agricultural imports	25.047	25.425	103.845	109.5	110.0
<b>VOLUME</b>					
--- Million metric tons <sup>2/</sup> ---					
Wine <sup>3/</sup>	0.331	0.300	1.183	1.3	1.2
Malt beer <sup>3/</sup>	0.659	0.737	3.133	3.2	3.5
Fruit juices <sup>3/</sup>	1.164	1.070	4.518	5.1	4.4
Cattle and calves <sup>4/</sup>	0.638	0.657	2.032	2.0	2.0
Swine <sup>4/</sup>	1.380	1.076	5.263	4.8	4.8
Beef and veal	0.153	0.172	0.733	0.7	0.8
Pork	0.090	0.102	0.371	0.4	0.4
Fruits, fresh	2.291	2.396	10.420	11.3	11.0
Fruits, processed	0.391	0.387	1.685	2.0	1.8
Vegetables, fresh	1.474	1.552	6.030	6.4	6.4
Vegetables, processed	0.828	0.814	3.200	3.4	3.2
Vegetable oils	0.905	1.046	3.961	4.2	4.6
Cocoa and chocolate	0.277	0.303	1.258	1.3	1.4
Coffee beans	0.337	0.353	1.525	1.6	1.6

Totals may not add due to rounding.

<sup>1/</sup> Largely tobacco and planting seeds. <sup>2/</sup> With exceptions footnoted. <sup>3/</sup> Liquid volume is in billion liters.

<sup>4/</sup> Million head.

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

## Regional Imports

The seasonal nature of many imported agricultural products, especially horticulture crops, is dependent on the geographic location of the source region or country. The top five sources of fresh or frozen fruit in 2013 were Mexico, Chile, Guatemala, Costa Rica, and Ecuador. Sixty percent of these imported fruits largely arrive from January to June (the second and third quarters of the fiscal year), when domestic fruits have not yet been harvested. The seasonal import pattern for fresh vegetables is largely concentrated from January to March, when more than 33 percent are shipped compared to the other quarters (26 percent are shipped from April to June). The top five suppliers of fresh vegetables in 2013 were Mexico, Canada, Peru, China, and Guatemala.

Processed fruits and vegetables are imported about evenly during each of the four quarters. The principal exporters of processed fruit (except juices) to the United States are China, Thailand, Mexico, Canada, and the Philippines. Fruit juices are supplied by China (apple juice), Brazil (orange juice), Mexico (orange juice), and Argentina (other juices). For processed vegetables (except frozen), the top sources are Mexico, China, Canada, Spain, and Peru. Tree nuts and their processed products are imported heavily from July to December from Vietnam (cashews), Mexico (pecans), India (cashews), China (other nuts), and the Philippines (coconuts). For wine, 28 percent is imported from October to December largely from Italy, France, Australia, Argentina, and Chile. Imported beer is shipped in large amounts from Mexico and the Netherlands, and essential oils are mostly imported from Ireland (where a large processing plant is located). The largest shares (about 30 percent) of beer and essential oil imports arrive during the summer months.

Table 6--U.S. agricultural imports: Value by region, 2013-14

Region and country	October - December		Fiscal year	Forecast fiscal year	
	2013	2014		2014	
			2013	Dec.	Feb.
<b>VALUE</b>	<i>-- Billion dollars--</i>				
Western Hemisphere	13.518	13.884	57.284	60.3	60.7
Canada	5.378	5.571	21.557	23.0	22.8
Mexico	3.828	4.285	17.215	18.2	18.8
Central America	1.006	0.889	4.693	4.9	4.7
Costa Rica	0.313	0.310	1.469	1.6	1.6
Guatemala	0.430	0.377	1.866	1.9	1.8
Other Central America	0.263	0.201	1.358	1.5	1.4
Caribbean	0.096	0.099	0.473	0.5	0.5
South America	3.211	3.039	13.345	13.8	14.0
Argentina	0.449	0.409	1.820	1.9	1.9
Brazil	1.109	0.774	3.751	3.9	3.9
Chile	0.380	0.406	2.843	3.0	3.0
Colombia	0.508	0.564	2.141	2.2	2.3
Other South America	0.764	0.886	2.789	2.9	3.0
Europe and Eurasia	4.844	5.079	18.656	19.5	19.7
European Union-28 1/	4.484	4.756	17.332	18.1	18.4
Other Europe	0.333	0.301	1.210	1.3	1.2
Asia	4.722	4.452	19.399	20.5	20.5
East Asia	1.518	1.482	5.864	6.1	6.0
China	1.160	1.120	4.458	4.6	4.5
Other East Asia	0.359	0.362	1.406	1.5	1.5
Southeast Asia	2.357	2.297	9.597	10.1	10.2
Indonesia	0.790	0.781	3.127	3.3	3.3
Malaysia	0.442	0.356	1.684	1.8	1.8
Thailand	0.535	0.551	2.216	2.4	2.4
Other Southeast Asia	0.590	0.609	2.570	2.7	2.7
South Asia	0.847	0.672	3.938	4.4	4.4
India	0.795	0.618	3.695	4.1	4.0
Oceania	1.204	1.229	4.989	5.3	5.2
Australia	0.709	0.740	2.719	2.9	2.9
New Zealand	0.461	0.461	2.177	2.4	2.3
Africa	0.529	0.520	2.405	2.6	2.5
Sub-Saharan Africa	0.450	0.436	2.063	2.2	2.1
Ivory Coast	0.162	0.192	0.890	1.0	1.1
Middle East	0.230	0.261	1.113	1.2	1.3
Turkey	0.137	0.163	0.714	0.8	0.9
<b>World total</b>	<b>25.047</b>	<b>25.425</b>	<b>103.845</b>	<b>109.5</b>	<b>110.0</b>

Totals may not add due to rounding.

1/ The former EU-27 and Croatia, which acceded in July 2013.

Sources: USDA 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 absolute forecast errors Fiscal 2011-13					Forecast accuracy Fiscal 2011-13					Forecast accuracy
	Aug	Nov	Feb	May	Aug	Aug	Nov	Feb	May	Aug	
<b>Export value</b>	<i>Percent</i>					<i>"X" if error &lt; 5%</i>					<i>Percent</i>
Grains and feeds	19	10	3	3	2	-	-	X	X	X	60
Wheat	25	11	4	5	5	-	-	X	X	X	60
Rice	9	5	6	5	3	-	X	-	X	X	60
Coarse grains	54	38	18	8	3	-	-	-	-	X	20
Corn	55	38	20	8	3	-	-	-	-	X	20
Feeds and fodders	5	5	6	3	1	X	X	-	X	X	80
Oilseeds and products	13	5	6	4	1	-	X	-	X	X	60
Soybeans	11	4	8	6	2	-	X	-	-	X	40
Soybean meal	26	19	17	9	3	-	-	-	-	X	20
Soybean oil	30	20	10	9	0	-	-	-	-	X	20
Livestock, poultry, and dairy	11	9	5	3	1	-	-	X	X	X	60
Livestock products	8	5	3	2	1	-	X	X	X	X	80
Beef and veal	15	10	7	4	2	-	-	-	X	X	40
Pork	8	6	3	1	2	-	-	X	X	X	60
Beef and pork variety meats	10	10	7	2	5	-	-	-	X	X	40
Hides, skins, and furs	10	8	6	5	4	-	-	-	X	X	40
Poultry and products	9	11	7	5	3	-	-	-	X	X	40
Broiler meat	11	10	7	6	3	-	-	-	-	X	20
Dairy products	27	23	17	11	5	-	-	-	-	X	20
Tobacco, unmanufactured	9	6	6	12	3	-	-	-	-	X	20
Cotton	16	12	6	2	1	-	-	-	X	X	40
Planting seeds	9	7	7	7	4	-	-	-	-	X	20
Horticultural products	3	3	2	2	1	X	X	X	X	X	100
Fruits and vegetables, fresh	4	4	3	3	2	X	X	X	X	X	100
Fruits and veget., processed	2	4	3	3	2	X	X	X	X	X	100
Tree nuts	7	8	6	4	3	-	-	-	X	X	40
Sugar and tropical products	12	8	7	3	2	-	-	-	X	X	40
Major bulk products	17	7	4	2	1	-	-	X	X	X	60
Total agricultural exports	7	5	2	1	0	-	X	X	X	X	80
Average error & accuracy	15	11	7	5	2	14%	31%	34%	69%	100%	50
<b>Export volume</b>											
Wheat	8	2	6	7	5	-	X	-	-	X	40
Rice	9	9	7	4	2	-	-	-	X	X	40
Coarse grains	37	28	17	9	2	-	-	-	-	X	20
Corn	39	29	19	9	2	-	-	-	-	X	20
Feeds and fodders	6	7	5	3	3	-	-	X	X	X	60
Soybeans	6	6	7	5	1	-	-	-	X	X	40
Soybean meal	17	13	10	6	2	-	-	-	-	X	20
Soybean oil	28	23	14	10	5	-	-	-	-	X	20
Beef and veal	16	8	8	4	0	-	-	-	X	X	40
Pork	4	4	2	0	2	X	X	X	X	X	100
Beef and pork variety meats	8	13	8	8	8	-	-	-	-	-	0
Broiler meat	7	5	1	3	3	-	X	X	X	X	80
Tobacco, unmanufactured	0	0	0	0	0	X	X	X	X	X	100
Cotton	7	12	10	7	2	-	-	-	-	X	20
Major bulk products	8	8	4	3	2	-	-	X	X	X	60
Average error & accuracy	13	11	8	5	3	13%	27%	33%	53%	93%	44

- = Error exceeds 5 percent.



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

Country/region	Average absolute forecast errors Fiscal 2011-13					Forecast accuracy Fiscal 2011-13					Forecast accuracy Percent
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
<b>Export value</b>	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					
Asia	19	6	3	2	1	-	-	X	X	X	60
East Asia	10	8	5	3	2	-	-	X	X	X	60
Japan	13	9	6	3	1	-	-	-	X	X	40
China	19	16	11	10	5	-	-	-	-	X	20
Hong Kong	12	6	3	4	7	-	-	X	X	-	40
Taiwan	12	9	9	6	7	-	-	-	-	-	0
South Korea	19	15	13	8	3	-	-	-	-	X	20
Southeast Asia	12	6	5	3	3	-	-	X	X	X	60
Indonesia	24	14	9	6	3	-	-	-	-	X	20
Philippines	9	8	4	4	1	-	-	X	X	X	60
Malaysia	14	10	4	4	7	-	-	X	X	-	40
Thailand	26	21	12	5	8	-	-	-	X	-	20
Vietnam	41	41	12	0	2	-	-	-	X	X	40
South Asia	23	28	28	23	23	-	-	-	-	-	0
India	40	40	11	5	5	-	-	-	X	X	40
Western Hemisphere	6	4	2	1	1	-	X	X	X	X	80
North America	7	5	3	1	1	-	X	X	X	X	80
Canada	6	3	2	1	0	-	X	X	X	X	80
Mexico	11	9	5	2	2	-	-	X	X	X	60
Caribbean	5	4	4	8	3	X	X	X	-	X	80
Dominican Republic	46	46	12	7	7	-	-	-	-	-	0
Central America	18	15	12	2	4	-	-	-	X	X	40
South America	15	13	10	8	4	-	-	-	-	X	20
Brazil	36	36	32	40	13	-	-	-	-	-	0
Colombia	39	37	21	8	0	-	-	-	-	X	20
Peru	50	50	30	10	10	-	-	-	-	-	0
Venezuela	14	9	12	9	2	-	-	-	-	X	20
Europe and Eurasia	13	12	6	6	4	-	-	-	-	X	20
European Union-27	17	15	9	6	4	-	-	-	-	X	20
Other Europe	21	21	21	28	13	-	-	-	-	-	0
FSU-12	13	13	13	13	7	-	-	-	-	-	0
Russia	20	20	15	15	2	-	-	-	-	X	20
Middle East	25	15	12	8	6	-	-	-	-	-	0
Turkey	24	11	8	7	7	-	-	-	-	-	0
Saudi Arabia	11	15	15	3	3	-	-	-	X	X	40
Africa	36	25	12	12	9	-	-	-	-	-	0
North Africa	52	37	18	21	13	-	-	-	-	-	0
Egypt	49	32	15	11	8	-	-	-	-	-	0
Sub-Saharan Africa	17	16	10	6	6	-	-	-	-	-	0
Nigeria	45	39	0	0	0	-	-	X	X	X	60
Oceania	36	13	11	11	6	-	-	-	-	-	0
Average error and accuracy	23	18	11	8	5	2%	10%	29%	41%	59%	34

- = Error exceeds 5 percent.



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

Commodity	Average absolute forecast errors Fiscal 2011-13					Forecast accuracy Fiscal 2011-13					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
<b>Import value</b>	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Livestock, poultry, and dairy	5	4	2	3	1	X	X	X	X	X	100
Livestock and meats	4	3	2	3	1	X	X	X	X	X	100
Cattle and calves	17	15	12	6	4	-	-	-	-	X	20
Swine	31	22	22	11	11	-	-	-	-	-	0
Beef and veal	9	9	7	5	4	-	-	-	X	X	40
Pork	5	5	2	5	2	X	X	X	X	X	100
Dairy products	7	7	1	3	1	-	-	X	X	X	60
Cheese	9	3	3	6	6	-	X	X	-	-	40
Grains and feed	5	3	3	2	1	X	X	X	X	X	100
Grain products	4	1	2	2	1	X	X	X	X	X	100
Oilseeds and products	16	16	13	5	2	-	-	-	X	X	40
Vegetable oils	21	20	10	4	2	-	-	-	X	X	40
Horticulture products	4	2	3	3	1	X	X	X	X	X	100
Fruits, fresh	3	4	2	5	0	X	X	X	X	X	100
Fruits, preserved	17	14	16	9	2	-	-	-	-	X	20
Fruit juices	24	20	15	11	5	-	-	-	-	X	20
Nuts and preparations	23	15	13	7	6	-	-	-	-	-	0
Vegetables, fresh	3	4	5	2	2	X	X	X	X	X	100
Vegetables, processed	8	5	5	3	2	-	X	X	X	X	80
Wine	3	3	6	4	1	X	X	-	X	X	80
Malt beer	6	6	4	4	2	-	-	X	X	X	60
Essential oils	6	3	3	3	3	-	X	X	X	X	80
Cut flowers and nursery stock	2	2	2	0	0	X	X	X	X	X	100
Sugar and tropical products	24	21	15	8	3	-	-	-	-	X	20
Sweeteners and products	27	15	10	8	6	-	-	-	-	-	0
Confections	7	2	2	2	2	-	X	X	X	X	80
Cocoa and products	10	11	10	10	7	-	-	-	-	-	0
Coffee beans and products	32	26	22	9	4	-	-	-	-	X	20
Natural rubber	50	46	36	16	9	-	-	-	-	-	0
Other imports	7	6	12	5	3	-	-	-	X	X	40
Total agricultural imports	9	7	6	4	1	-	-	-	X	X	40
Average error and accuracy	13	10	9	5	3	32%	45%	48%	65%	81%	54
<b>Import volume</b>											
Wine (HL)	17	17	8	8	0	-	-	-	-	X	20
Malt beer (HL)	6	6	6	3	3	-	-	-	X	X	40
Fruit juices (HL)	16	16	11	11	4	-	-	-	-	X	20
Cattle and calves	5	5	0	10	0	X	X	X	-	X	80
Swine	8	4	4	2	0	-	X	X	X	X	80
Beef and veal	29	14	14	14	14	-	-	-	-	-	0
Pork	0	0	25	25	0	X	X	-	-	X	60
Fruits--fresh	8	4	1	2	1	-	X	X	X	X	80
Fruits--processed	6	6	6	6	0	-	-	-	-	X	20
Vegetables--fresh	2	2	2	2	0	X	X	X	X	X	100
Vegetables--processed	6	6	6	3	0	-	-	-	X	X	40
Vegetable oils	13	8	0	5	3	-	-	X	X	X	60
Cocoa and products	8	0	0	8	8	-	X	X	-	-	40
Coffee beans and products	7	7	7	0	0	-	-	-	X	X	40
Average error and accuracy	9	7	6	7	2	21%	43%	43%	50%	86%	49

- = Error exceeds 5 percent. HL = hectoliters.

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

Country/region	Average absolute forecast errors Fiscal 2011-13					Forecast accuracy Fiscal 2011-13					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
<b>Import value</b>	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Western Hemisphere	8	6	5	4	2	-	-	X	X	X	60
Canada	6	3	2	3	2	-	X	X	X	X	80
Mexico	9	8	4	4	1	-	-	X	X	X	60
Central America	13	8	16	9	1	-	-	-	-	X	20
Costa Rica	9	4	5	4	2	-	X	X	X	X	80
Guatemala	13	9	18	9	3	-	-	-	-	X	20
Other Central America	16	14	25	9	4	-	-	-	-	X	20
Caribbean	19	12	19	13	0	-	-	-	-	X	20
South America	11	6	6	5	3	-	-	-	X	X	40
Argentina	14	8	10	10	6	-	-	-	-	-	0
Brazil	17	9	7	12	8	-	-	-	-	-	0
Chile	4	8	1	1	1	X	-	X	X	X	80
Colombia	18	12	12	6	3	-	-	-	-	X	20
Other South America	12	4	6	5	5	-	X	-	X	X	60
Europe and Eurasia	4	5	3	2	0	X	X	X	X	X	100
European Union-27	5	6	3	1	0	X	-	X	X	X	80
Other Europe	6	6	6	12	3	-	-	-	-	X	20
Asia	20	12	12	5	2	-	-	-	X	X	40
East Asia	8	9	6	5	2	-	-	-	X	X	40
China	9	10	8	5	2	-	-	-	X	X	40
Other East Asia	3	10	5	5	0	X	-	X	X	X	80
Southeast Asia	27	18	17	8	3	-	-	-	-	X	20
Indonesia	33	20	21	12	2	-	-	-	-	X	20
Malaysia	37	25	21	15	7	-	-	-	-	-	0
Thailand	25	16	17	8	1	-	-	-	-	X	20
Other Southeast Asia	17	11	10	4	1	-	-	-	X	X	40
South Asia	46	39	38	21	8	-	-	-	-	-	0
India	49	42	40	23	10	-	-	-	-	-	0
Oceania	8	4	10	8	4	-	X	-	-	X	40
Australia	6	3	10	9	5	-	X	-	-	X	40
New Zealand	10	4	8	6	2	-	X	-	-	X	40
Africa	21	14	14	13	8	-	-	-	-	-	0
Sub-Saharan Africa	21	15	13	10	6	-	-	-	-	-	0
Ivory Coast	16	23	20	25	14	-	-	-	-	-	0
Middle East	14	13	14	7	0	-	-	-	-	X	20
Turkey	16	10	17	10	6	-	-	-	-	-	0
Average error & accuracy	16	12	12	9	4	11%	19%	22%	39%	75%	33

- = Error exceeds 5 percent.

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#### Horticultural & Tropical Products:

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Fresh Citrus: Reed Blauer/FAS, 720-0898

Vegetables & Preparations: Tony Halstead/FAS, 690-4620

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

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### 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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