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Outlook for U.S. Agricultural Trade

FY 2016 Exports Forecast at \$125.0 Billion; Imports at a Record \$118.5 Billion

Contents

[Economic Outlook](#)
[Export Products](#)
[Regional Exports](#)
[Import Products](#)
[Regional Imports](#)
[Contact Information](#)

Tables

[Macro Trends](#)
[Commodity Exports](#)
[Regional Exports](#)
[Commodity Imports](#)
[Regional Imports](#)
[Reliability Tables](#)

Web Sites

[U.S. Trade Data](#)[FAQ & Summary
Data](#)[Articles on U.S.
Trade](#)-----
The next release is
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Outlook Board.

Agricultural exports in FY 2016 are forecast at \$125.0 billion, \$6.5 billion below the November projection and \$14.7 billion below FY 2015 exports. Lower prices, strong competition, and reduced demand account for most of the decline. Grain and feed exports are forecast at \$27.2 billion, down \$1.4 billion from the November forecast as strong competition reduces volumes and ample global supplies reduce unit values of corn and wheat. Oilseed and product exports are forecast at \$25.4 billion, down \$900 million from the previous forecast in response to lower soybean and soybean meal export volumes and prices. A strong dollar relative to weaker currencies in Brazil and Argentina has reduced U.S. competitiveness. Cotton exports are forecast at \$3.2 billion, unchanged from November. The forecast for livestock, poultry, and dairy is lowered \$2.5 billion from the previous forecast to \$25.7 billion as lower prices drive declines for virtually all products. Horticultural exports are lowered \$1.8 billion, but remain at a record \$34.7 billion, mainly due to lower volumes and unit prices for many commodities (a combination that has not affected exports since 2009).

U.S. agricultural imports are forecast at a record \$118.5 billion, down \$3.5 billion from November but \$4.5 billion higher than in FY 2015. The U.S. agricultural trade surplus is forecast at \$6.5 billion, down from \$25.7 billion in FY 2015 and the lowest since FY 2006.

Table 1--U.S. agricultural trade, fiscal years 2010-16, year ending September 30

Item	2010	2011	2012	2013	2014	2015	Forecast fiscal year*	
							2016	
							Nov.	Feb.
--- Billion dollars ---								
Exports	108.5	137.5	135.9	141.1	152.3	139.7	131.5	125.0
Imports	79.0	94.5	103.4	103.9	109.2	114.0	122.0	118.5
Balance	29.5	43.0	32.5	37.2	43.1	25.7	9.5	6.5

*Reflects forecasts in the February 9, 2016, *World Agricultural Supply and Demand Estimates* report.

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

U.S. economy continues to strengthen despite external challenges

Strong economic fundamentals in the United States and improved growth elsewhere in the developed world supported world economic growth of approximately 2.8 percent in 2015. Despite slowing growth rates in many developing countries, higher world growth of 3.1 percent is expected in 2016. Developing country growth in 2015 is estimated at 3.8 percent and is expected to be 4.1 percent in 2016. This is robust growth, but it is a significant slowdown compared to the 6.2-percent average growth rate over the previous decade. Global trade volume growth in 2015 is estimated at only 0.8 percent—it is expected to recover to 3.2 percent in 2016.

Largely driven by relative U.S. economic vitality, the value of the dollar appreciated considerably in 2015 and is expected to also gain, but by less, in 2016. Expected dollar appreciation against key currencies has been revised up significantly relative to last quarter's outlook. For many countries, notably China, the revision reflects changes in policy and weaker-than-expected economic conditions. For commodity exporters like Canada, the continued descent of oil prices is weakening currency values. In addition, domestic conditions are expected to support the U.S. Federal Reserve's announced intentions to continue raising interest rates, albeit slowly, while rates are expected to be held at low levels elsewhere. This makes the United States a relatively attractive destination for financial and business investors and appears to be generating capital outflows elsewhere, putting upward pressure on the dollar.

Oil prices fell dramatically in 2015 and have continued falling in early 2016, surpassing lows observed during the financial crisis—the price of U.S. crude fell to less than \$28/barrel in mid-February. Since the most recent OPEC meeting ended without an agreed output target, larger-than-expected supply, particularly from Saudi Arabia, has flooded world markets. A tentative agreement announced in mid-February between a group of major oil exporters (led by Russia and Saudi Arabia) may cap future crude output and limit the surplus. (Notably, this agreement did not include Iran, which has gained greater access to the international market as U.S. and European sanctions were lifted in January.) In addition to growing supply, the International Energy Agency predicts further weakening of global oil demand in 2016 due to slower economic growth. Continued low prices are thus expected to provide farmers, manufacturers, fertilizer producers, and farm-product exporters a low-cost environment in 2016.

The weak economic growth and falling currency values that characterized the Argentine and Brazilian economies in 2015 are expected to persist in 2016. Macroeconomic imbalances, high inflation, and considerable public and private debt burdens are expected to depress economic growth in these countries for several years. Upon taking office in December, a new Argentine Government took immediate and decisive steps toward significant macroeconomic and fiscal policy reform (notably, all but dismantling the system of agricultural export taxes imposed by the previous Government). Elimination of the dual exchange-rate system produced an immediate nominal dollar appreciation of nearly 40 percent. However, further depreciation in the Argentine peso has been limited, suggesting confidence in the new Government's policies. This confidence may attract inward capital

flows, which would stem the decline in the peso's value and provide a boost to economic growth.

In contrast, a contentious political environment is limiting the Brazilian Government's ability to make necessary reforms. The recession in Brazil in 2015 is expected to persist, if not deepen, in 2016. Brazil is facing a severe budget crisis as its current policies are unaffordable in an environment of low commodity prices and difficult borrowing conditions. The real is expected to continue weakening as Brazilian economic conditions deteriorate further, in spite of expected intervention to support its value. Brazil and Argentina are two of the United States' closest competitors in global agricultural markets, and the decline in the value of their currencies increases their export competitiveness. However, it also implies higher production costs as the cost of imported inputs also rises.

The United States continues to be a driver of the world economy, with estimated growth of 2.4 percent in 2015. Strong labor market indicators point to more jobs and rising wages through 2016, lifting consumer spending. This is reflected in a 2016 growth forecast of 2.6 percent. Relatively weak foreign demand and a strong dollar will continue to put pressure on exports, but this will be somewhat offset by continued low energy prices.

Economic recovery in the European Union delivered stronger-than-expected estimated 2015 growth of 1.5 percent, sustaining its modest recovery from the debt crisis that began in 2009. A relatively weak euro, low energy prices, and improved credit conditions are expected to support 2.0-percent growth in 2016.

Persistently low commodity prices are taking a toll on Canadian growth with the relatively low growth rate of 1.2 percent in 2015 expected to increase only slightly to 1.6 percent in 2016. A declining Canadian dollar, alongside strong growth in the United States is expected to benefit sectors outside of energy in the medium term.

Economic growth in Asia and Oceania is estimated at 4.4 percent for 2015 and is expected to be stable at 4.5 percent in 2016. The outlook for Japanese and South Korean consumer spending is positive, supported by expectations for fiscal stimulus and monetary easing. However, slowing demand from trading partners in the region, particularly China, will be a drag on growth. Although still experiencing high levels of growth, the Chinese economy experienced a significant slowdown in 2015 with growth estimated at 6.9 percent, the lowest rate since 1990. Slower growth of 6.3 percent is expected for 2016 as the transition from an investment- to a consumer-driven economy continues. The dollar appreciated slightly relative to the yuan in 2015 as China modified its exchange rate policy. Steady but significant dollar appreciation is expected in 2016. India is a rare case of increasing growth among emerging economies. It overtook China as the fastest growing country in 2015 with 7.3-percent growth. This strong growth is expected to continue in 2016 and beyond as long as the pace of economic reform remains supportive of economic expansion. Steady growth is expected in the rest of South and Southeast Asia despite widespread medium-term concern about debt levels, inflation, and slowing demand from China.

The Latin American region was in recession in 2015 with estimated growth of -0.5 percent. A growth rate near zero for the region is expected in 2016, largely because of persistent recessions in Brazil and Venezuela. An external environment characterized by low commodity prices and weak demand, coupled with internal

environments characterized by high inflation and public and private sector debt concerns in many Latin American countries, will make it difficult for the region to avoid a period of very low growth and considerably weakened currencies.

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

Region/Country	Share of world GDP (2009-2011)	Real GDP		Real exchange rate 2/		CPI	
		2015	2016	2015	2016	2015	2016
		Growth rate		Growth rate		Growth rate	
World 3/	100.0	2.8	3.1	8.6	3.8	1.5	2.1
NAFTA	26.3	2.3	2.5	2.0	0.9	0.3	1.3
Canada	2.5	1.2	1.6	14.7	6.4	1.1	1.2
United States	23.1	2.4	2.6	--	--	0.1	1.3
Mexico	1.1	2.5	2.5	16.2	7.4	2.8	2.8
Latin America	7.7	-0.5	0.0	11.2	8.8	20.9	48.1
Argentina	0.7	1.3	0.5	-1.6	33.4	16.0	30.1
Brazil	3.4	-3.7	-3.0	30.0	27.3	9.0	7.0
Chile	0.3	2.1	2.3	10.0	8.4	4.4	3.7
Euro Zone	24.1	1.5	2.0	19.8	4.5	0.0	0.7
Asia and Oceania	28.7	4.4	4.5	6.5	4.3	1.9	2.3
China	9.3	6.9	6.3	0.7	6.4	1.4	1.9
Japan	8.4	0.7	1.2	13.4	3.1	0.9	0.4
South Korea	1.7	2.5	3.0	6.8	7.2	0.7	1.2
Indonesia	1.2	4.8	5.0	6.2	2.6	6.4	4.0
Malaysia	0.4	4.7	4.3	17.0	11.1	2.1	3.0
Philippines	0.3	5.5	5.5	1.2	1.3	1.4	2.9
Thailand	0.5	2.6	3.0	6.5	6.6	-0.9	0.6
Vietnam	0.2	6.7	6.4	0.3	-1.0	0.6	4.0
India	2.6	7.3	7.5	1.0	3.1	4.9	7.0
Australia	1.8	2.4	2.6	18.4	7.1	1.5	1.9
New Zealand	0.2	2.2	2.5	18.6	4.4	0.4	1.8
Middle East	4.2	2.5	3.2	5.2	2.5	9.4	10.2
Turkey	1.1	3.3	3.0	15.6	8.4	7.7	8.5
Africa	2.9	3.4	3.8	6.6	1.5	6.8	7.3
South Africa	0.6	1.4	1.0	12.6	27.6	4.6	6.3

1/ Real values have a 2010 base year.

2/ Local currency per U.S. dollar. A negative growth rate indicates a depreciation of the dollar. World real exchange rate is U.S. agricultural trade weighted.

3/ World and regional values for real GDP and CPI (Consumer Price Index) are GDP-weighted averages with the exception of the world real exchange rate, which is weighted by U.S. agricultural exports.

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

Export Products

FY 2016 grain and feed exports are forecast at \$27.2 billion, down \$1.4 billion from the November forecast due to lower volumes and unit values for corn and wheat. Corn is forecast down \$900 million to \$7.4 billion, primarily on lower volume. Competition from Argentina and Brazil has presented a challenge for U.S. exports. Unit values are also down with abundant domestic and global supplies.

Wheat exports are forecast at \$5.0 billion, a decrease of \$500 million due to lower volume and unit values. Volume is down due to a strong dollar and competition from Argentina and Canada. Prices are pressured lower by record global supplies. FY 2016 rice exports are forecast at \$1.8 billion, unchanged from the November projection, as higher unit values offset lower volumes. Volumes are down marginally on fewer shipments to the Middle East, Latin America, and Sub-Saharan Africa.

Oilseed and product exports are forecast at \$25.4 billion, down \$900 million in response to lower soybean and soybean meal export volumes and unit prices. Forecast soybean export value is reduced \$600 million to \$17.0 billion, while meal is lowered \$300 million to \$3.7 billion. A strong dollar relative to weaker currencies in Brazil and Argentina has reduced export volumes. December's significant depreciation in the Argentine peso is helping to boost Argentine exports, leading to a lower U.S. soybean meal export forecast and adding further pressure on prices and crush margins. Forecast soybean oil export value is up \$100 million on stronger unit values. Drier weather in Indonesia and Malaysia has cut into palm oil supplies and boosted U.S. soybean oil prices.

Cotton exports are forecast at \$3.2 billion, unchanged from November. Export volume is forecast down 100,000 tons to 2.1 million. A smaller U.S. crop than previously expected and concerns over the quality of the crop have slowed sales and lowered the U.S. share of world trade. Unit values are up slightly due to higher-than-expected prices last quarter.

Livestock, poultry, and dairy exports are reduced \$2.5 billion to \$25.7 billion as lower prices drive declines for virtually all products. Beef is reduced \$200 million to \$5.4 billion as lower unit values more than offset higher volumes. Due to weak demand and lower unit values, poultry and products are decreased \$400 million to \$4.8 billion, while pork is forecast \$100 million lower to \$4.3 billion. Dairy is reduced \$700 million to \$4.9 billion as exporters face weak import demand, low prices, and strong competition from the EU. Hides, skins, and furs are lowered \$500 million to \$2.0 billion on depressed unit values.

Horticultural exports are lowered \$1.8 billion but remain at a record \$34.7 billion, mainly due to lower volumes and unit prices for many commodities, a combination that has not affected exports since 2009. Fresh fruit and vegetable exports are lowered \$500 million to \$7.1 billion primarily due to declines in Canada and Mexico, where approximately two-thirds of these products are shipped. Processed fruit and vegetable exports are reduced \$200 million to \$7.6 billion. Demand for U.S. fruit juice, dried fruit, and highly processed products is expected to decrease, particularly in Europe, Japan, and Mexico as these consumers look for better values or curtail consumption. Tree nut exports are lowered \$800 million to \$9.0 billion due mainly to lower volumes and unit values for pistachios to top markets in Europe

and China. Sales of almonds and walnuts to these markets have also slowed from previous expectations.

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Table 3--U.S. agricultural exports: Value and volume by commodity, 2015-2016

Commodity	October - December		Fiscal year 2015	Forecast Fiscal year 2016	
	2015	2016		Nov.	Feb.
VALUE					
--- Billion dollars ---					
Grains and feeds 1/	7.112	6.399	31.602	28.6	27.2
Wheat 2/	1.334	1.058	5.846	5.5	5.0
Rice	0.540	0.484	2.124	1.8	1.8
Coarse grains 3/	2.324	1.893	11.043	9.8	8.9
Corn	1.823	1.305	8.791	8.3	7.4
Feeds and fodders	1.727	1.863	8.064	7.0	6.9
Oilseeds and products 4/	15.066	11.882	31.701	26.3	25.4
Soybeans	12.281	9.556	21.637	17.6	17.0
Soybean meal 5/	1.526	1.080	5.255	4.0	3.7
Soybean oil	0.239	0.276	0.771	0.8	0.9
Livestock, poultry, and dairy	8.272	6.408	29.290	28.2	25.7
Livestock products	5.120	4.147	18.240	17.5	16.0
Beef and veal 6/	1.712	1.297	5.848	5.6	5.4
Pork 6/	1.341	1.173	4.935	4.4	4.3
Beef and pork variety meats 6/	0.485	0.385	1.595	1.6	1.5
Hides, skins, and furs	0.615	0.424	2.628	2.5	2.0
Poultry and products	1.663	1.091	5.488	5.2	4.8
Broiler meat 6/ 7/	1.004	0.643	3.361	3.1	2.8
Dairy products	1.489	1.169	5.562	5.6	4.9
Tobacco, unmanufactured	0.329	0.188	1.250	1.0	1.0
Cotton	0.746	0.501	4.141	3.2	3.2
Seeds	0.448	0.471	1.572	1.6	1.7
Horticultural products 8/	9.410	8.888	34.107	36.5	34.7
Fruits and vegetables, fresh	1.926	1.697	7.216	7.6	7.1
Fruits and vegetables, processed 8/	1.834	1.888	7.384	7.8	7.6
Tree nuts, whole and processed	3.037	2.652	8.908	9.8	9.0
Sugar and tropical products 9/	1.611	1.520	6.064	6.1	6.1
Major bulk products 10/	17.554	13.681	46.042	38.9	36.9
Total	42.995	36.261	139.741	131.5	125.0
VOLUME					
--- Million metric tons ---					
Wheat 2/	4.461	4.345	21.145	22.4	21.7
Rice	1.030	0.889	4.148	3.6	3.4
Coarse grains 3/	11.384	9.679	56.233	53.8	49.9
Corn	9.208	6.945	46.699	46.0	42.0
Feeds and fodders	4.413	5.496	21.493	19.0	18.9
Soybeans	28.199	25.972	50.401	46.7	46.0
Soybean meal 5/	3.247	2.855	11.929	10.8	10.2
Soybean oil	0.284	0.332	0.914	1.0	1.0
Beef and veal 6/	0.216	0.199	0.775	0.8	0.8
Pork 6/	0.391	0.438	1.651	1.8	1.7
Beef and pork variety meats 6/	0.220	0.184	0.737	0.8	0.8
Broiler meat 6/ 7/	0.808	0.677	2.997	3.1	3.0
Tobacco, unmanufactured	0.048	0.027	0.177	0.2	0.1
Cotton	0.425	0.306	2.519	2.2	2.1
Major bulk products 10/	45.546	41.217	134.622	128.9	123.2

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 Census Bureau, U.S. Department of Commerce.

Regional Exports

Agricultural exports in FY 2016 are forecast at \$125 billion, which is \$6.5 billion below the November projection and \$14.7 billion below FY 2015 exports, primarily due to lower exports to East Asia and North America.

Asia

The export forecast to **China** is reduced \$700 million to \$17.5 billion. Exports of soybeans are projected lower due to diminishing U.S. competitiveness versus South America and overall reduced unit values. Sales of hides and skins, dairy, poultry, and tree nuts are also lower. U.S. agricultural exports to China in the first quarter of FY 2016 (October-December) were down \$2.3 billion compared to the same period last year. The new forecast total will tie China with Mexico for the second-largest U.S. agricultural market (after Canada).

Japan is forecast down \$800 million to \$10.4 billion as a result of lower U.S. shipments of pork and beef (Japan is the largest U.S. market for both), as well as reduced sales of corn, dairy, and tree nuts. The projection for **South Korea** is slashed \$1.0 billion on account of slower-than-expected exports of wheat, corn, soybeans, beef, pork, hides and skins, and dairy. **Hong Kong** is forecast down \$600 million due to reduced demand for beef, poultry, and tree nuts. **Taiwan** is forecast down \$100 million, primarily due to lower bulk shipments of soybeans, wheat, and corn.

In Southeast Asia, exports to **Indonesia** are reduced by \$500 million as a result of decreased soybeans, soybean meal, and dairy prospects, while **Vietnam** is forecast down \$300 million as a result of reduced demand for soybeans, tree nuts, and processed fruit. The **Philippines** is forecast down \$100 million due to lower wheat and dairy prices.

Western Hemisphere

Exports to **Canada** are forecast down \$500 million to \$20.8 billion as a result of lower exports of beef, pork, and tree nuts.

Mexico is forecast down \$500 million to \$17.5 billion. Export values for pork, poultry, dairy, and soybeans are all expected to be lower.

Exports to the **Dominican Republic** are forecast down \$200 million as a result of reduced prospects for wheat, corn, and soybean meal. **Peru** is forecast down \$400 million, largely due to reduced competitiveness of U.S. corn versus Argentine supplies. Exports to **Colombia** are forecast down \$300 million due to reduced exports of soybeans, soybean meal and oil, pork, and fresh fruit. **Venezuela** is forecast down \$100 million, as its shrinking foreign reserve leads to reduced demand for U.S. wheat.

Europe, Africa, and the Middle East

Exports to **Turkey** are forecast down \$400 million due to significantly reduced soybean commitments (shipments and outstanding sales) and lower unit values.

Table 4--U.S. agricultural exports: Value by region, 2015-2016

Country and region 1/	October - December		Fiscal year 2015	Share of 2015 total	Forecast	
	2015	2016			Fiscal year 2016	
	--- Billion dollars ---			Percent	--- Billion dollars ---	
					Nov.	Feb.
Asia	21.208	16.975	60.766	43.5	54.6	50.5
East Asia	17.751	13.972	47.941	34.3	42.5	39.3
Japan	2.819	2.273	11.703	8.4	11.2	10.4
China	10.895	8.555	22.545	16.1	18.2	17.5
Hong Kong	1.501	1.149	3.935	2.8	3.9	3.3
Taiwan	0.958	0.810	3.315	2.4	3.0	2.9
South Korea	1.573	1.183	6.428	4.6	6.2	5.2
Southeast Asia	3.023	2.417	10.664	7.6	10.1	9.2
Indonesia	0.690	0.439	2.443	1.7	2.3	1.8
Philippines	0.668	0.566	2.421	1.7	2.2	2.1
Malaysia	0.229	0.204	0.865	0.6	0.8	0.8
Thailand	0.466	0.453	1.719	1.2	1.6	1.6
Vietnam	0.757	0.583	2.413	1.7	2.4	2.1
South Asia	0.433	0.586	2.160	1.5	2.0	2.0
India	0.228	0.304	1.113	0.8	1.0	1.0
Western Hemisphere	14.346	12.688	53.682	38.4	52.7	51.0
North America	10.304	9.526	39.342	28.2	39.3	38.3
Canada	5.492	5.024	21.337	15.3	21.3	20.8
Mexico	4.812	4.502	18.005	12.9	18.0	17.5
Caribbean	0.907	0.834	3.363	2.4	3.4	3.4
Dominican Republic	0.334	0.288	1.179	0.8	1.2	1.0
Central America	1.038	0.942	3.836	2.7	3.7	3.7
South America	2.097	1.385	7.141	5.1	6.3	5.6
Brazil	0.262	0.164	0.788	0.6	0.5	0.5
Colombia	0.676	0.502	2.600	1.9	2.6	2.3
Peru	0.422	0.240	1.246	0.9	1.2	0.8
Venezuela	0.322	0.099	0.898	0.6	0.5	0.4
Europe/Eurasia	4.162	3.938	13.608	9.7	12.8	12.8
European Union-28 2/	3.763	3.569	12.311	8.8	11.5	11.5
Other Europe 3/	0.175	0.159	0.663	0.5	0.6	0.6
FSU-12 4/	0.224	0.209	0.634	0.5	0.7	0.7
Russia	0.147	0.167	0.406	0.3	0.4	0.4
Middle East	1.764	1.427	5.886	4.2	5.8	5.4
Turkey	0.665	0.403	1.620	1.2	1.6	1.2
Saudi Arabia	0.300	0.314	1.268	0.9	1.2	1.2
Africa	0.949	0.750	3.718	2.7	3.4	3.4
North Africa	0.423	0.353	1.812	1.3	1.6	1.6
Egypt	0.203	0.181	1.044	0.7	0.8	0.8
Sub-Saharan Africa	0.525	0.397	1.906	1.4	1.8	1.8
Nigeria	0.140	0.132	0.675	0.5	0.5	0.5
Oceania	0.566	0.483	2.081	1.5	2.1	2.1
Trans-shipments via Canada 5/	0.000	0.000	0.000	0.0	0.0	0.0
Total	42.995	36.261	139.741	100.0	131.5	125.0

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) 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 minus 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 the U.S. Census Bureau, U.S. Department of Commerce.

Import Products

FY 2016 livestock and poultry imports are forecast to decline \$3.7 billion from 2015 to \$15.8 billion. Beef imports are forecast \$2.2 billion lower to \$5.0 billion, accounting for the majority of the decline. The strong pace of imports in 2015 resulted in record-high cold storage stocks, while a recovery in U.S. beef production will further dampen demand for imported beef, resulting in reduced volumes and average unit values in 2016. Live cattle imports are also expected to decline by \$1.0 billion to \$1.7 billion on lower volumes and average unit values. Cattle supplies reached a cyclical low point in 2015, but herd recovery this year will reduce demand for imported cattle from Canada and Mexico.

FY 2016 grain and feed imports are forecast at \$11.0 billion, up \$200 million from 2015, as larger volumes more than offset weaker prices. Imports are reduced from November on lower expected unit values. Processed grain products are anticipated to increase \$300 million to \$7.2 billion, accounting for the increased grain imports. FY 2016 imports of oilseeds and products are expected to increase \$200 million from 2015 to \$9.0 billion, as world supply of oilseeds is projected to increase. However, projections are reduced \$400 million from the most recent report, due in part to lower unit values for oilseed and meal.

Horticultural product imports are forecast to increase approximately 8 percent in FY 2016, up to \$53.9 billion. However, this is a slight reduction from the November forecast as a slowdown in the growth of imports of processed fruits is anticipated, partially due to lower-than-expected growth of imported fruit juice from South America. Also, the FY 2016 value of imported nuts has been lowered to \$3.1 billion from the previous forecast, though this would still be over 20 percent larger than last year's record level. Imports of fresh fruits are estimated to be worth \$11.3 billion in 2016, up over \$1.1 billion from FY 2015, as increased demand is driven by higher consumer incomes and healthier diets. Greater demand is also expected to drive up the value of imported fresh vegetables to reach a record \$7.0 billion in 2016.

U.S. imports of sugar and tropical products are forecast to be worth \$26.9 billion in FY 2016, up \$3.4 billion from 2015. Tropical products have been adjusted downward since November's outlook, as rubber imports are now expected to increase by just over \$300 million instead of \$600 million (though this still reverses the downward trend through FY 2015 that had steadily reduced consumption of foreign rubber to about a third of its 2011 total). Coffee is anticipated to rise \$900 million in 2016 due to higher demand, and cocoa products are expected to increase \$600 million due to higher cocoa bean prices.

Table 5--U.S. agricultural imports: Value and volume by commodity, fiscal years 2015-2016

Commodity	October - December		Fiscal year 2015	Forecast	
	2015	2016		Fiscal year 2016	
				Nov	Feb
VALUE	--- Billion dollars ---				
Livestock, dairy, & poultry	5.221	4.221	19.452	18.0	15.8
Livestock and meats	4.080	3.078	15.151	13.7	11.5
Cattle and calves	0.908	0.464	2.641	2.5	1.7
Swine	0.106	0.091	0.374	0.3	0.3
Beef and veal	1.751	1.203	7.207	6.0	5.0
Pork	0.489	0.447	1.700	1.5	1.4
Dairy products	0.965	0.869	3.488	3.5	3.4
Cheese	0.398	0.375	1.314	1.4	1.4
Grains and feed	2.842	2.821	10.856	11.2	11.0
Grain products	1.785	1.846	6.976	7.2	7.2
Oilseeds and products	2.118	1.953	8.755	9.4	9.0
Vegetable oils	1.305	1.229	5.339	5.6	5.6
Horticulture products	11.727	12.695	49.692	54.5	53.9
Fruits, fresh	2.172	2.412	10.176	11.3	11.3
Fruits, processed	1.180	1.197	5.131	5.9	5.6
Fruit juices	0.468	0.423	1.835	2.1	2.0
Nuts, whole and processed	0.714	0.789	2.581	3.3	3.1
Vegetables, fresh	1.739	1.879	6.882	7.0	7.0
Vegetables, processed	1.111	1.190	4.428	4.6	4.6
Wine	1.405	1.467	5.501	5.8	5.8
Malt beer	0.904	1.072	4.368	4.9	4.9
Essential oils	0.770	0.875	3.345	3.6	3.6
Cut flowers & nursery stock	0.400	0.397	1.724	1.9	1.8
Sugar & tropical products	5.573	5.258	23.520	27.2	26.9
Sweeteners & products	1.096	1.032	4.871	4.9	4.9
Confections	0.418	0.419	1.629	1.8	1.8
Cocoa and products	1.046	1.161	4.701	5.3	5.3
Coffee and products	1.527	1.432	6.393	7.3	7.3
Rubber, natural	0.404	0.328	1.578	2.2	1.9
Other imports 1/	0.443	0.452	1.750	1.9	1.9
Total agricultural imports	25.401	27.950	114.026	122.0	118.5
VOLUME	--- Million metric tons ---				
Wine 2/	0.283	0.311	1.162	1.3	1.3
Malt beer 2/	0.747	0.852	3.545	3.8	3.8
Fruit juices 2/	1.118	1.078	4.511	4.8	4.7
Cattle and calves 3/	0.787	0.480	2.265	2.2	1.8
Swine 3/	1.272	1.520	5.493	5.1	6.1
Beef and veal	0.275	0.206	1.195	1.0	0.9
Pork	0.133	0.133	0.490	0.4	0.5
Fruits, fresh	2.390	2.572	11.157	11.3	11.3
Fruits, processed	0.412	0.440	1.893	2.1	2.0
Vegetables, fresh	1.623	1.702	6.462	6.6	6.6
Vegetables, processed	0.824	0.903	3.432	3.5	3.5
Vegetable oils	1.071	1.103	4.391	4.5	4.5
Cocoa and products	0.262	0.296	1.295	1.4	1.4
Coffee and products	0.336	0.387	1.533	1.7	1.7

Totals may not add due to rounding.

1/ Largely tobacco and planting seeds. 2/ Billion liters. 3/ Million head.

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

Regional Imports

Agricultural imports in FY 2016 are forecast at \$118.5 billion, which is up \$4.5 billion from the total value in 2015 but down \$3.5 billion from the November forecast. The expected decreases are largely due to reduced imports of animal products and lower growth expectations for horticultural products and sugar and tropical products.

Imports from Asia are now expected to grow by about \$500 million from 2015, down \$1.2 billion from the most recent projection. This is partially due to the aforementioned anticipated changes in horticultural and tropical products and the impact on the United States' largest suppliers, such as processed fruit from China and rubber from Southeast Asia.

The Western Hemisphere is expected to increase by \$2.7 billion from FY 2015 to \$65.0 billion, as South and Central America are bolstered by greater demand for fresh fruit and coffee products, reinforced by the regions' comparative and seasonal advantages. In North America, imports from Mexico are projected to grow by about \$900 million from FY 2015, largely driven by increased shipments of fresh fruits and vegetables and sugar and tropical products. In FY 2016, the United States is expected to import about \$600 million more from Canada than last year, though projections have been adjusted downward due to changes in outlooks for animal products and oilseeds and products.

Expected FY 2016 supplies from Oceania have been reduced from November's projections by \$400 million for Australia and \$200 million for New Zealand. These updated figures reflect greater-than-world-average declines in animal product imports from the region thus far this fiscal year—however, the current forecasts would still represent record-high levels.

FY 2016 imports for the EU are expected to hold at \$20.9 billion, about a \$1.2-billion increase over last year, as U.S. imports of wine, beer, and essential oils from the region remain strong. Africa and the Middle East are expected to supply the United States with record-high imports, as those regions' horticultural and sugar and tropical products sectors are growing suppliers to the U.S. market.

Table 6--U.S. agricultural imports: Value by region, fiscal years 2015-2016

Region and country	October - December		Fiscal year	Share of	Forecast	
	2015	2016	2015	total	Fiscal year 2016	
	--- Billion dollars ---		Percent		Nov.	Feb.
Western Hemisphere	15.127	15.008	62.268	54.6	66.5	65.0
Canada	5.874	5.348	22.268	19.5	23.8	22.9
Mexico	4.698	5.059	20.633	18.1	21.8	21.5
Central America	1.106	1.032	5.049	4.4	5.5	5.4
Costa Rica	0.351	0.333	1.502	1.3	1.6	1.6
Guatemala	0.447	0.431	1.944	1.7	2.1	2.1
Other Central America	0.308	0.268	1.602	1.4	1.9	1.8
Caribbean	0.107	0.101	0.581	0.5	0.7	0.7
South America	3.341	3.470	13.738	12.0	14.8	14.6
Argentina	0.357	0.438	1.456	1.3	1.5	1.5
Brazil	0.955	0.903	3.534	3.1	3.8	3.7
Chile	0.420	0.466	2.807	2.5	2.8	2.9
Colombia	0.636	0.593	2.472	2.2	2.8	2.7
Peru	0.502	0.589	1.591	1.4	2.2	2.2
Other South America	0.472	0.481	1.878	1.6	1.7	1.7
Europe and Eurasia	5.302	5.690	21.140	18.5	22.6	22.5
European Union-28	4.968	5.275	19.691	17.3	20.9	20.9
Other Europe	0.335	0.415	1.449	1.3	1.5	1.5
Asia	4.688	4.255	18.728	16.4	20.4	19.2
East Asia	1.426	1.467	5.793	5.1	6.1	5.8
China	1.054	1.084	4.330	3.8	4.6	4.4
Other East Asia	0.371	0.383	1.462	1.3	1.6	1.5
Southeast Asia	2.364	2.166	9.663	8.5	10.5	9.9
Indonesia	0.706	0.676	2.914	2.6	3.0	2.9
Malaysia	0.341	0.261	1.246	1.1	1.4	1.2
Thailand	0.541	0.522	2.295	2.0	2.5	2.4
Vietnam	0.447	0.411	1.878	1.6	2.1	2.0
Other Southeast Asia	0.329	0.296	1.330	1.2	1.6	1.6
South Asia	0.899	0.621	3.272	2.9	3.9	3.6
India	0.826	0.546	2.952	2.6	3.6	3.3
Oceania	1.943	1.439	7.767	6.8	9.0	8.4
Australia	1.294	0.916	4.652	4.1	5.4	5.0
New Zealand	0.610	0.488	2.998	2.6	3.5	3.3
Africa	0.508	0.636	2.709	2.4	2.9	2.9
Sub-Saharan Africa	0.422	0.508	2.226	2.0	2.5	2.5
Ivory Coast	0.111	0.194	0.921	0.8	1.0	1.0
Middle East	0.289	0.333	1.305	1.1	1.5	1.5
Turkey	0.187	0.224	1.160	1.0	1.4	1.4
World total	27.925	27.400	114.026	100.0	122.0	118.5

Totals may not add due to rounding.

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 2013-15					Forecast accuracy Fiscal 2013-15					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
Export value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Grains and feeds	16	15	8	3	2	-	-	-	X	X	40
Wheat	15	13	5	6	2	-	-	-	-	X	20
Rice	7	4	8	5	5	-	X	-	-	X	40
Coarse grains	51	45	22	6	1	-	-	-	-	X	20
Corn	50	44	22	5	1	-	-	-	-	X	20
Feeds and fodders	14	19	15	7	3	-	-	-	-	X	20
Oilseeds and products	14	9	5	2	1	-	-	X	X	X	60
Soybeans	12	11	6	4	1	-	-	-	X	X	40
Soybean meal	32	22	13	6	3	-	-	-	-	X	20
Soybean oil	25	26	13	8	4	-	-	-	-	X	20
Livestock, poultry, and dairy	9	9	6	5	1	-	-	-	-	X	20
Livestock products	5	6	4	4	1	X	-	X	X	X	80
Beef and veal	10	13	9	7	3	-	-	-	-	X	20
Pork	8	7	4	3	2	-	-	X	X	X	60
Beef and pork variety meats	4	6	7	10	3	X	-	-	-	X	40
Hides, skins, and furs	9	13	6	2	1	-	-	-	X	X	40
Poultry and products	6	8	5	5	2	-	-	X	-	X	40
Broiler meat	8	10	6	5	1	-	-	-	X	X	40
Dairy products	24	20	17	11	4	-	-	-	-	X	20
Tobacco, unmanufactured	7	7	7	7	5	-	-	-	-	X	20
Cotton	8	12	9	6	2	-	-	-	-	X	20
Planting seeds	11	11	11	11	3	-	-	-	-	X	20
Horticultural products	5	5	4	2	2	X	X	X	X	X	100
Fruits and vegetables, fresh	7	7	6	4	3	-	-	-	X	X	40
Fruits and veget., processed	6	6	4	3	2	-	-	X	X	X	60
Tree nuts	4	4	2	1	1	X	X	X	X	X	100
Sugar and tropical products	12	12	9	5	1	-	-	-	X	X	40
Major bulk products	13	14	7	2	1	-	-	-	X	X	40
Total agricultural exports	5	5	3	1	0	-	-	X	X	X	60
Average error & accuracy	14	13	8	5	2	14%	10%	28%	48%	100%	40
Export volume											
Wheat	8	9	9	7	3	-	-	-	-	X	20
Rice	8	7	8	5	5	-	-	-	-	X	20
Coarse grains	42	34	18	5	3	-	-	-	X	X	40
Corn	42	35	19	5	3	-	-	-	X	X	40
Feeds and fodders	14	18	17	13	9	-	-	-	-	-	0
Soybeans	13	8	6	4	1	-	-	-	X	X	40
Soybean meal	21	14	10	6	2	-	-	-	-	X	20
Soybean oil	29	33	7	7	3	-	-	-	-	X	20
Beef and veal	11	10	4	4	3	-	-	X	X	X	60
Pork	5	5	3	1	2	-	-	X	X	X	60
Beef and pork variety meats	7	6	12	13	4	-	-	-	-	X	20
Broiler meat	5	5	3	2	2	X	-	X	X	X	80
Tobacco, unmanufactured	22	22	14	14	22	-	-	-	-	-	0
Cotton	8	10	7	5	3	-	-	-	-	X	20
Major bulk products	13	12	6	2	2	-	-	-	X	X	40
Average error & accuracy	17	15	9	6	4	7%	0%	20%	47%	87%	32

- = Error exceeds 5 percent.

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

Country/region	Average absolute forecast errors					Forecast accuracy					Forecast accuracy
	Fiscal 2013-15					Fiscal 2013-15					
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	Percent
Export value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					
Asia	7	6	3	1	1	-	-	X	X	X	60
East Asia	8	8	4	1	2	-	-	X	X	X	60
Japan	9	9	5	3	1	-	-	-	X	X	40
China	14	11	4	4	4	-	-	X	X	X	60
Hong Kong	11	12	7	6	7	-	-	-	-	-	0
Taiwan	7	7	7	4	4	-	-	-	X	X	40
South Korea	19	20	17	11	2	-	-	-	-	X	20
Southeast Asia	9	7	5	2	3	-	-	-	X	X	40
Indonesia	19	13	9	4	1	-	-	-	X	X	40
Philippines	11	9	6	2	2	-	-	-	X	X	40
Malaysia	15	15	6	5	6	-	-	-	-	-	0
Thailand	21	21	21	6	4	-	-	-	-	X	20
Vietnam	8	8	6	14	18	-	-	-	-	-	0
South Asia	13	13	13	16	9	-	-	-	-	-	0
India	6	6	6	15	13	-	-	-	-	-	0
Western Hemisphere	3	3	2	3	1	X	X	X	X	X	100
North America	3	2	2	2	1	X	X	X	X	X	100
Canada	2	2	2	2	1	X	X	X	X	X	100
Mexico	5	5	4	3	2	-	X	X	X	X	80
Caribbean	5	5	3	4	2	-	-	X	X	X	60
Dominican Republic	14	14	7	6	6	-	-	-	-	-	0
Central America	20	20	20	7	5	-	-	-	-	X	20
South America	21	21	18	11	5	-	-	-	-	-	0
Brazil	40	42	34	24	7	-	-	-	-	-	0
Colombia	35	35	25	10	3	-	-	-	-	X	20
Peru	20	20	11	18	25	-	-	-	-	-	0
Venezuela	21	21	18	10	8	-	-	-	-	-	0
Europe and Eurasia	10	9	8	5	3	-	-	-	X	X	40
European Union-27	12	11	10	6	3	-	-	-	-	X	20
Other Europe	24	24	24	24	8	-	-	-	-	-	0
FSU-12	10	10	10	10	9	-	-	-	-	-	0
Russia	17	17	17	17	2	-	-	-	-	X	20
Middle East	12	12	10	7	3	-	-	-	-	X	20
Turkey	16	18	14	16	16	-	-	-	-	-	0
Saudi Arabia	10	10	10	5	5	-	-	-	-	-	0
Africa	30	28	18	11	4	-	-	-	-	X	20
North Africa	37	35	21	16	7	-	-	-	-	-	0
Egypt	38	34	19	16	13	-	-	-	-	-	0
Sub-Saharan Africa	23	21	15	8	4	-	-	-	-	X	20
Nigeria	11	8	5	5	11	-	-	X	X	-	40
Oceania	33	12	12	12	4	-	-	-	-	X	20
Average error and accuracy	16	15	11	9	6	7%	10%	22%	37%	59%	27

- = Error exceeds 5 percent.

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

Commodity	Average absolute forecast errors Fiscal 2013-15					Forecast accuracy Fiscal 2013-15					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
Import value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Livestock, poultry, and dairy	9	9	6	7	2	-	-	-	-	X	20
Livestock and meats	10	9	7	8	2	-	-	-	-	X	20
Cattle and calves	21	12	7	6	3	-	-	-	-	X	20
Swine	18	18	14	6	5	-	-	-	-	-	0
Beef and veal	18	19	14	11	4	-	-	-	-	X	20
Pork	12	6	9	12	4	-	-	-	-	X	20
Dairy products	4	7	1	3	3	X	-	X	X	X	80
Cheese	5	4	7	8	4	-	X	-	-	X	40
Grains and feed	3	6	5	2	1	X	-	-	X	X	60
Grain products	2	2	3	2	2	X	X	X	X	X	100
Oilseeds and products	12	10	9	4	1	-	-	-	X	X	40
Vegetable oils	11	5	3	2	4	-	X	X	X	X	80
Horticulture products	3	2	4	4	1	X	X	X	X	X	100
Fruits, fresh	4	3	1	7	2	X	X	X	-	X	80
Fruits, preserved	4	6	7	7	2	X	-	-	-	X	40
Fruit juices	14	8	4	7	5	-	-	X	-	X	40
Nuts and preparations	14	7	5	5	5	-	-	-	-	-	0
Vegetables, fresh	5	6	9	3	1	X	-	-	X	X	60
Vegetables, processed	15	12	11	9	7	-	-	-	-	-	0
Wine	4	4	6	3	0	X	X	-	X	X	80
Malt beer	6	8	3	4	3	-	-	X	X	X	60
Essential oils	6	4	4	3	5	-	X	X	X	X	80
Cut flowers and nursery stock	4	4	4	2	2	X	X	X	X	X	100
Sugar and tropical products	24	18	13	6	2	-	-	-	-	X	20
Sweeteners and products	13	10	4	5	1	-	-	X	X	X	60
Confections	11	10	7	4	5	-	-	-	X	-	20
Cocoa and products	12	10	10	4	2	-	-	-	X	X	40
Coffee beans and products	21	15	12	9	4	-	-	-	-	X	20
Natural rubber	69	54	39	16	5	-	-	-	-	-	0
Other imports	28	33	26	13	5	-	-	-	-	-	0
Total agricultural imports	6	5	4	4	1	-	-	X	X	X	60
Average error and accuracy	13	10	8	6	3	29%	26%	35%	48%	81%	44
Import volume											
Wine (HL)	15	12	6	6	3	-	-	-	-	X	20
Malt beer (HL)	3	5	3	3	3	X	-	X	X	X	80
Fruit juices (HL)	11	12	5	5	3	-	-	X	X	X	60
Cattle and calves	7	6	4	7	1	-	-	X	-	X	40
Swine	10	6	6	5	1	-	-	-	X	X	40
Beef and veal	17	18	13	9	3	-	-	-	-	X	20
Pork	14	10	9	14	3	-	-	-	-	X	20
Fruits--fresh	4	4	1	2	1	X	X	X	X	X	100
Fruits--processed	8	10	10	10	5	-	-	-	-	X	20
Vegetables--fresh	3	3	3	2	1	X	X	X	X	X	100
Vegetables--processed	21	20	18	18	17	-	-	-	-	-	0
Vegetable oils	5	4	4	6	3	X	X	X	-	X	80
Cocoa and products	10	5	2	6	3	-	X	X	-	X	60
Coffee beans and products	6	6	3	2	2	-	-	X	X	X	60
Average error and accuracy	10	9	6	7	3	29%	29%	57%	43%	93%	50

- = 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 2013-15					Forecast accuracy Fiscal 2013-15					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
Import value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Western Hemisphere	5	3	4	4	0	-	X	X	X	X	80
Canada	6	5	3	3	1	-	X	X	X	X	80
Mexico	3	3	2	4	1	X	X	X	X	X	100
Central America	11	10	12	8	3	-	-	-	-	X	20
Costa Rica	10	8	9	8	3	-	-	-	-	X	20
Guatemala	11	10	9	7	4	-	-	-	-	X	20
Other Central America	15	18	21	10	6	-	-	-	-	-	0
Caribbean	18	21	18	17	9	-	-	-	-	-	0
South America	8	5	6	4	2	-	-	-	X	X	40
Argentina	18	16	11	6	3	-	-	-	-	X	20
Brazil	13	9	11	10	3	-	-	-	-	X	20
Chile	7	5	7	6	3	-	X	-	-	X	40
Colombia	8	8	9	5	3	-	-	-	X	X	40
Other South America	87	85	54	56	58	-	-	-	-	-	0
Europe and Eurasia	3	2	1	2	1	X	X	X	X	X	100
European Union-27	3	3	1	1	1	X	X	X	X	X	100
Other Europe	10	7	5	11	6	-	-	X	-	-	20
Asia	18	15	13	6	2	-	-	-	-	X	20
East Asia	8	7	6	6	1	-	-	-	-	X	20
China	10	8	7	6	2	-	-	-	-	X	20
Other East Asia	3	3	2	5	2	X	X	X	-	X	80
Southeast Asia	16	14	9	4	1	-	-	-	X	X	40
Indonesia	21	17	10	3	3	-	-	-	X	X	40
Malaysia	34	31	22	8	3	-	-	-	-	X	20
Thailand	14	14	9	8	2	-	-	-	-	X	20
Other Southeast Asia	146	144	111	90	91	-	-	-	-	-	0
South Asia	37	33	48	19	10	-	-	-	-	-	0
India	40	36	43	20	10	-	-	-	-	-	0
Oceania	15	15	27	15	7	-	-	-	-	-	0
Australia	18	17	30	13	8	-	-	-	-	-	0
New Zealand	10	9	24	18	7	-	-	-	-	-	0
Africa	10	7	10	9	2	-	-	-	-	X	20
Sub-Saharan Africa	14	11	11	6	2	-	-	-	-	X	20
Ivory Coast	26	29	46	13	3	-	-	-	-	X	20
Middle East	8	10	23	4	5	-	-	-	X	-	20
Turkey	14	13	17	8	5	-	-	-	-	-	0
Average error & accuracy	19	18	18	12	8	11%	19%	19%	28%	67%	29

- = Error exceeds 5 percent.

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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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