



Outlook for U.S. Agricultural Trade

FY 2015 Export Forecast Lowered to \$140.5 Billion, \$12.0 Billion Below Record FY 2014 Exports

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<p style="text-align: center;">-----</p> <p>The next release is August 27, 2015</p>

Fiscal 2015 agricultural exports are forecast at \$140.5 billion, down \$1.0 billion from the February forecast and down \$12.0 billion from fiscal 2014. If realized, this would be the lowest level of exports since fiscal 2012. Lower exports of high-value products (non-bulk) make up nearly the entire decline from the previous forecast. Exports of horticultural products are down \$1.0 billion with slower-than-expected shipments of fresh and processed fruits and vegetables and other horticultural products. The forecast for livestock, poultry, and dairy is lowered \$500 million on smaller exports of dairy due to strong global competition and reduced poultry exports due to greater trade restrictions. Cotton exports are unchanged. Oilseed and product exports are raised \$100 million as higher soybean meal values more than offset lower soybean prices. The grain and feed export forecast is raised \$600 million, with record exports of sorghum and stronger-than-expected exports of feed and fodders, including distiller's dried grains with solubles (DDGS).

U.S. agricultural imports are forecast at a record \$117.0 billion, down \$2.0 billion from February, but \$7.8 billion higher than in fiscal 2014. The U.S. agricultural trade surplus is forecast at \$23.5 billion, down from \$43.3 billion in fiscal 2014.

Table 1--U.S. agricultural trade, fiscal years 2009-15, year ending September 30

Item	2009	2010	2011	2012	2013	2014	Forecast fiscal year	
							2015	
							Feb.	May
	<i>Billion dollars</i>							
Exports	96.3	108.5	137.5	135.9	141.0	152.5	141.5	140.5
Imports	73.4	79.0	94.5	103.4	103.9	109.2	119.0	117.0
Balance	22.9	29.6	43.0	32.5	37.1	43.3	22.5	23.5

Reflects forecasts in the May 12, 2015, World Agricultural Supply and Demand Estimates report.
 Source: Compiled by USDA using data from U.S. Census Bureau, U.S. Department of Commerce.

Approved by the
World Agricultural
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Economic Outlook

Dollar Up Sharply, World Growth Up, Oil Prices Down in 2015

World economic growth is expected to rise from 2.7 percent in 2014 to 2.9 percent in 2015, driven by continuing solid growth in developing Asia. Brent crude oil has stopped its decline, after bottoming at below \$50 per barrel in January. The JP Morgan real effective dollar index averaged 93.99 for the fourth quarter 2014 and appreciated to just over 100 for the first quarter 2015. The real dollar in 2015 is expected to average almost 9 percent above 2014. The recent dollar appreciation has accelerated significantly in the largest U.S. agricultural export markets. For example, the dollar is expected to appreciate almost 25 percent against the euro, about twice the rate of appreciation that had been expected in the February report. However, the dollar's value is expected to fall 9.4 percent in real terms relative to the Argentine peso in 2015, based on recent trends.

The real dollar appreciation of recent months reflects the relatively strong and stable U.S. economy. Political instability, along with economic weakness and uncertainty due to geopolitical events in Europe, Japan, China, and Latin America, make the United States a relatively attractive destination for investors around the world. Recent interest rate cuts in many countries also add to the attractiveness of the United States as a destination for financial and business investment. These trends are expected to continue, and along with increases in U.S. interest rates expected in late 2015, support the forecast of continued dollar strength through 2015.

The dollar's strength is expected to be a significant damper on U.S. export growth into 2015. Movements in exchange rates are a leading factor explaining movements in U.S. exports since they are a key determinant of the relative price of U.S. agricultural products in global markets. USDA's Economic Research Service has demonstrated that, while long-term growth in agricultural exports is largely driven by growth in foreign income, changes in exchange rates are primary factors determining year-to-year variation in exports. While the dollar's value is high relative to recent history, it remains below the highs of the early 2000s. However, relatively low energy prices and steady world growth will partly offset the impact of a strengthening dollar on U.S. agriculture.

The expansion in North American oil supply is likely to slow in 2015. Nonetheless, U.S. prices for crude oil and natural gas are expected to continue to be below world levels in 2015. This, and the stronger dollar are expected to provide U.S. oil refiners, farmers, manufacturers, fertilizer producers, and farm product exporters a lower cost environment in 2015.

Global trade volume growth is forecast to slow from 3.4 percent in 2014 to 2.7 percent in 2015 because of a sharp rise in the value of the dollar and steady world growth. Low U.S. energy costs will slightly offset the impact of falling U.S. agricultural exports in 2015 on the farm sector.

Gross domestic product (GDP) in Asia and Oceania is expected to grow by 4.3 percent in 2015. Japan and Europe are expected to avoid recession but deflation is a real possibility in 2015. China's structural reforms to enhance long-term growth will slow growth to 6.6 percent in 2015. Loosening credit, low oil prices, and a weak yuan will slow the effective pace of reform but support 2015 GDP growth.

India will likely get a large boost from low oil prices, enabling them to surpass China's growth rate in late 2015. For both economies, the reforms to re-orient industrial production and services to serve domestic consumers are expected to have zero net impact on 2015's GDP. Growth in the rest of South and Southeast Asia is expected to also be strong in 2015 despite potential widespread medium-term problems with debt and inflation.

Overall, the economy in North America is expected to grow 2.5 percent in 2015, virtually unchanged from 2014. In the United States, strong labor market indicators in late 2014 and early 2015 point to more jobs and rising wages through 2015, lifting consumer spending. Steady U.S. growth in 2015 provides a neutral environment for Canadian and Mexican exports. Lower oil and commodity prices in 2015 should moderate the gains in these economies from higher export volumes as oil and gas revenues fall in 2015. The recessions in Argentina, Brazil, and Venezuela will sharply slow growth in South America in 2015. Europe is expected to grow faster in 2015 as consumer and business spending modestly recovers. However, the expected 1.9-percent growth in 2015 will pull world growth down.

Expected strong U.S. growth and the associated rising imports and low oil prices provide insurance against a world recession in 2015. Nevertheless, contagion from a debt default by Greece or a spillover of current geopolitical events to neighboring countries could trigger a world growth slowdown and a sharper rise in the dollar, hurting U.S. farm exports. A large emerging economy, such as Venezuela, defaulting on its debt would likely cause significant capital outflows out of neighboring countries.

Table 2--Macroeconomic variables affecting U.S. agricultural trade

Region/country	World GDP share (2012)	GDP growth		Real exchange rate growth 1/		Inflation	
		2014	2015	2014	2015	2014	2015
				<i>Percent change</i>			
World (U.S. trade-weighted)	100.0	2.7	2.9	1.4	8.9	2.4	1.6
NAFTA	27.0	2.4	2.5	0.7	1.7	1.8	0.6
Canada	2.5	2.5	2.2	6.5	11.4	1.9	0.8
United States	22.9	2.4	2.5	0.0	0.0	1.6	0.4
Mexico	1.7	2.1	2.7	1.9	10.2	4.0	3.3
South America	6.0	1.5	0.7	2.9	15.9	7.1	8.1
Argentina	0.8	0.5	0.0	25.3	-9.4	19.9	23.4
Brazil	3.3	0.0	-1.1	4.2	22.2	6.3	7.5
Chile	0.3	1.8	2.8	12.0	3.8	4.4	3.8
Colombia	0.5	4.6	3.4	5.7	16.9	2.9	3.8
Venezuela	0.6	-3.7	-6.0	-35.7	18.2	62.2	96.5
Europe	28.7	1.5	1.9	NA	NA	1.3	0.8
Eurozone	16.8	0.9	1.6	1.2	24.7	0.4	0.1
United Kingdom	3.4	2.8	2.6	-5.4	10.7	1.5	0.4
Asia and Oceania	29.8	4.2	4.3	2.6	6.4	2.8	1.6
China	10.3	7.4	6.6	-0.2	1.0	2.0	1.1
Japan	8.2	-0.1	0.8	7.3	16.2	2.7	0.3
South Korea	1.7	3.3	3.2	-3.5	1.7	1.3	1.1
Taiwan	0.7	3.7	3.1	2.4	3.3	1.2	-0.4
Indonesia	1.2	5.0	5.5	8.5	2.8	6.4	6.5
Malaysia	0.4	6.0	4.8	2.3	8.6	3.1	2.1
Philippines	0.3	6.1	6.1	2.1	-2.5	4.2	2.7
Thailand	0.5	0.7	3.9	5.5	1.9	1.9	0.3
Vietnam	0.2	6.0	6.3	-1.6	-1.7	4.1	2.7
India	2.8	7.2	7.5	-0.9	-1.7	6.6	5.5
Australia	1.8	2.7	2.8	6.2	17.7	2.5	2.0
New Zealand	0.2	3.5	3.1	-1.6	5.0	1.6	2.0
Middle East	4.4	2.7	2.7	1.3	3.8	4.8	6.5
Turkey	1.4	2.9	3.3	7.4	13.4	8.9	6.7
Africa	3.0	3.9	3.9	2.1	1.9	8.2	6.5
South Africa	0.6	1.5	2.1	7.7	2.9	6.1	4.8

1/ Local currency per U.S. dollar. A negative growth rate indicates a depreciation of the U.S. dollar. World is U.S. trade-weighted average.

Source: Calculations and compilation by USDA, Economic Research Service using data and forecasts from IHS Global Insight, the International Monetary Fund (IMF), and Oxford Economics.

Export Products

Fiscal year 2015 grain and feed exports are forecast at \$30.5 billion, up \$600 million from the February forecast largely due to sorghum and certain feed products. Coarse grain exports are forecast at \$10.7 billion, up \$400 million mostly on higher volumes of sorghum as China continues its purchases. Corn volume is forecast at 46.0 million tons, up 1.5 million from February, but is largely offset by slightly weaker values. Feeds and fodders are up \$400 million, mostly supported by renewed shipments of DDGS to China and higher values (attributable to China's purchases).

Fiscal 2015 wheat exports are forecast at \$6.1 billion, a decrease of \$300 million, mainly due to lower volumes. Higher unit values are partially offsetting these lower volumes. While U.S. new-crop production is forecast higher, abundant competitor supplies will continue to constrain export opportunities. Rice exports remain at \$1.9 billion, consistent with February's projections. Large global and U.S. supplies continue to weigh on prices, lowering unit values slightly. Total volume for rice, however, is forecast to increase by 100,000 tons from February, with stronger sales in South America and the Middle East.

Fiscal 2015 oilseed and product exports are forecast at \$31.0 billion, up \$100 million from the previous forecast. Strong early-season sales and current commitments support record soybean and soybean meal export volume. Unit values for soybeans are reduced based on strong competition from Brazil, a weak real, and record U.S. plantings this spring. This reduces the soybean export forecast by \$200 million, but is more than offset by a larger soybean meal forecast, raised in response to stronger-than-expected unit prices. Strong competition from Argentina is expected to limit U.S. soybean oil export volume and reduce export value.

Fiscal 2015 cotton exports are unchanged from the February forecast of \$3.7 billion. Export volume is also forecast unchanged at 2.3 million tons, despite a slightly larger U.S. crop than previously estimated.

Fiscal 2015 livestock, poultry, and dairy exports are reduced \$500 million to \$31.3 billion as lower dairy and poultry product exports are not offset by gains in other livestock products. Dairy products are lowered \$300 million to \$6.2 billion as exports face strong competition in an oversupplied market. Beef and pork exports are unchanged at \$6.5 billion and \$4.8 billion, respectively, as a relatively strong dollar continues to constrain shipments. However, exports of beef and pork variety meats are up \$200 million as demand remains robust. Poultry exports are lowered \$100 million to \$6.0 billion due to highly pathogenic avian influenza-related (HPAI) trade restrictions by a number of countries.

The fiscal 2015 export forecast for horticultural products is lowered \$1.0 billion to \$35.0 billion. Fresh fruit and vegetables are down \$200 million to \$7.5 billion on reduced volumes to Japan and Mexico. Processed fruit and vegetable exports are reduced \$300 million to \$7.7 billion on lower shipments to Japan, China, and Hong Kong. Whole and processed tree nuts are unchanged at \$9.0 billion.

Table 3—U.S. agricultural exports: Value and volume, by commodity, 2014-15

Commodity	October-March		Fiscal 2014	Forecast fiscal year 2015	
	2014	2015		Feb.	May
VALUE -- Billion dollars --					
Grains and feeds 1/	16.992	14.972	36.491	29.9	30.5
Wheat 2/	3.787	2.862	8.240	6.4	6.1
Rice	1.087	1.088	2.050	1.9	1.9
Coarse grains 3/	5.360	5.214	12.527	10.3	10.7
Corn	4.858	4.012	11.110	8.5	8.5
Feeds and fodders	4.481	3.549	9.050	6.9	7.3
Oilseeds and products	27.638	24.348	35.051	30.9	31.0
Soybeans	21.221	18.597	24.243	21.3	21.1
Soybean meal 4/	3.774	3.193	5.706	4.9	5.2
Soybean oil	0.545	0.501	0.810	0.8	0.7
Livestock, poultry, and dairy	16.560	15.405	33.815	31.8	31.3
Livestock products	9.762	9.476	19.995	19.2	19.2
Beef and veal 5/	2.786	3.068	6.038	6.5	6.5
Pork 5/	2.779	2.524	5.678	4.8	4.8
Beef and pork variety meats 5/	0.784	0.895	1.610	1.7	1.9
Hides, skins, and furs	1.514	1.283	2.988	2.8	2.6
Poultry and products	3.116	3.054	6.408	6.1	6.0
Broiler meat 5/ 6/	2.022	1.858	4.098	3.9	3.7
Dairy products	3.681	2.875	7.412	6.5	6.2
Tobacco, unmanufactured	0.790	0.798	1.113	1.1	1.1
Cotton	2.802	2.221	4.595	3.7	3.7
Seeds	1.100	1.010	1.723	1.7	1.7
Horticultural products 7/	17.221	17.472	33.433	36.0	35.0
Fruits and vegetables, fresh	3.568	3.491	7.420	7.7	7.5
Fruits and vegetables, processed	3.759	3.663	7.610	8.0	7.7
Tree nuts, whole and processed	4.856	5.187	8.133	9.0	9.0
Sugar and tropical products 8/	3.129	3.010	6.277	6.5	6.3
Major bulk products 9/	35.046	30.779	52.768	44.7	44.6
Total	86.240	79.243	152.513	141.5	140.5
VOLUME --- Million metric tons ---					
Wheat 2/	12.349	9.723	27.057	24.2	22.5
Rice	1.854	2.127	3.360	3.7	3.8
Coarse grains 3/	24.092	25.487	56.718	52.3	55.3
Corn	21.974	20.439	50.565	44.5	46.0
Feeds and fodders	11.294	9.016	27.860	18.2	18.5
Soybeans	39.683	42.643	45.420	48.7	49.0
Soybean meal 4/	7.102	6.921	10.478	11.6	11.6
Soybean oil	0.574	0.606	0.851	0.9	0.9
Beef and veal 5/	0.422	0.392	0.869	0.8	0.8
Pork 5/	0.903	0.791	1.711	1.6	1.6
Beef and pork variety meats 6/	0.399	0.410	0.796	0.9	0.9
Broiler meat 5/ 6/	1.681	1.548	3.354	3.2	3.1
Tobacco, unmanufactured	0.104	0.108	0.152	0.2	0.2
Cotton	1.330	1.329	2.176	2.3	2.3
Major bulk products 9/	79.411	81.417	134.882	131.4	133.1

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 food preparations, essential oils, and wine. 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 2015 are forecast at \$140.5 billion, which is \$1.0 billion below the February forecast and \$12.0 billion below the record fiscal 2014 exports. The forecast is down primarily due to lower exports to **China** and **Africa**, and continues to be affected by the stronger dollar.

Asia

Exports to **China** are forecast down \$1.1 billion to \$22.5 billion, the lowest level since 2011. U.S. exports to China in the first 6 months of the fiscal year are already down \$3.5 billion from the same period in fiscal 2014. Typically, over three-quarters of U.S. exports to China take place in the first half of the fiscal year. Although U.S. soybean export volumes have already reached record levels, lower prices have resulted in values lower than that of last year. U.S. consumer-oriented product export levels, such as pork, dairy, and tree nuts, are also significantly behind last year's pace. However, U.S. sorghum exports to China are at record levels, and according to export sales reports, over two-thirds of U.S. sorghum production in 2014 has already been sold to China this fiscal year. Also, while DDGS exports had been significantly down earlier in the fiscal year due to import restrictions, these exports to China have been strengthening in recent months. China is still forecast to remain the largest market for the United States.

The forecast for **South Korea** is revised up \$200 million to \$6.2 billion due to strong sales of U.S. beef and pork. **Indonesia** is lowered \$200 million to \$2.6 billion due to fewer soybean shipments, and the **Philippines** is down \$200 million to \$2.5 billion because of lower soybean meal and dairy exports. **Vietnam** is up \$200 million to \$2.2 billion. U.S. tree nut exports in the first 6 months have already surpassed last year's record, and cotton sales have been very strong. **Thailand** is up \$100 million to \$1.6 billion due to greater shipments of soybean meal.

Western Hemisphere

Exports to **Colombia** are raised \$400 million to a record \$2.4 billion and **Peru** is up \$200 million to a record \$1.0 billion, partly due to strong corn sales. U.S. corn has beneficial access to these markets as a result of free trade agreements. **Venezuela** is down \$200 million to \$1.0 billion.

Central America is raised \$200 million to \$3.5 billion because of stronger-than-expected exports of both bulk and consumer-oriented products in the first half of the year. Exports to the **Dominican Republic** are raised \$100 million to \$1.2 billion, due to a stronger-than-expected pace to date.

Europe, Africa, and the Middle East

Exports to **North Africa** are down \$300 million to \$2.0 billion (including **Egypt**, which is down \$200 million to \$1.2 billion). Dairy shipments have been sharply lower throughout the region, and U.S. corn sales to Egypt are also down. **Sub-Saharan Africa** is down \$100 million to \$2.1 billion, primarily because of sluggish wheat shipments to the region.

Turkey is down \$100 million to \$1.8 billion partly due to smaller cotton exports.

Table 4--U.S. agricultural exports: Value by region, 2014-15

Country and region	October-March		Fiscal 2014	Share of 2014 total	Forecast fiscal year 2015	
	2014	2015			Feb.	May
	<i>-- Billion dollars --</i>			<i>Percent</i>	<i>-- Billion dollars --</i>	
Asia	41.866	37.561	66.856	43.8	62.1	60.9
East Asia	34.519	30.424	53.706	35.2	49.3	48.4
Japan	6.441	5.937	13.382	8.8	12.3	12.3
China	20.485	16.982	25.884	17.0	23.6	22.5
Hong Kong	2.224	2.399	4.058	2.7	4.2	4.2
Taiwan	1.903	1.788	3.498	2.3	3.2	3.2
South Korea	3.461	3.309	6.867	4.5	6.0	6.2
Southeast Asia	6.533	6.096	11.468	7.5	11.0	10.7
Indonesia	1.627	1.377	2.986	2.0	2.8	2.6
Philippines	1.503	1.301	2.784	1.8	2.7	2.5
Malaysia	0.559	0.475	0.998	0.7	0.9	0.9
Thailand	1.058	1.075	1.610	1.1	1.5	1.6
Vietnam	1.352	1.478	2.236	1.5	2.0	2.2
South Asia	0.814	1.040	1.682	1.1	1.8	1.8
India	0.446	0.494	0.996	0.7	0.9	0.9
Western Hemisphere	27.776	27.321	56.629	37.1	53.7	54.3
North America	19.982	19.753	41.242	27.0	40.5	40.5
Canada	10.453	10.585	21.744	14.3	21.8	21.8
Mexico	9.529	9.168	19.497	12.8	18.7	18.7
Caribbean	1.872	1.775	3.648	2.4	3.6	3.6
Dominican Republic	0.655	0.635	1.282	0.8	1.1	1.2
Central America	1.895	1.968	3.766	2.5	3.3	3.5
South America	4.028	3.825	7.973	5.2	6.3	6.7
Brazil	0.819	0.432	1.660	1.1	0.9	0.9
Colombia	1.100	1.380	2.271	1.5	2.0	2.4
Peru	0.510	0.703	0.939	0.6	0.8	1.0
Venezuela	0.658	0.481	1.322	0.9	1.2	1.0
Europe/Eurasia	8.926	7.877	14.842	9.7	13.4	13.4
European Union-28	7.608	7.140	12.707	8.3	12.1	12.1
Other Europe 1/	0.322	0.324	0.569	0.4	0.6	0.6
FSU-12 2/	0.996	0.413	1.565	1.0	0.7	0.7
Russia	0.730	0.273	1.174	0.8	0.4	0.4
Middle East	3.873	3.448	6.660	4.4	5.9	5.9
Turkey	1.412	1.173	2.071	1.4	1.9	1.8
Saudi Arabia	0.766	0.637	1.401	0.9	1.2	1.2
Africa	2.563	1.978	5.236	3.4	4.5	4.1
North Africa	1.433	1.008	2.851	1.9	2.3	2.0
Egypt	0.835	0.534	1.878	1.2	1.4	1.2
Sub-Saharan Africa	1.130	0.971	2.385	1.6	2.2	2.1
Nigeria	0.419	0.312	0.893	0.6	0.8	0.8
Oceania	0.192	0.199	2.119	1.4	2.1	2.1
Trans-shipments via Canada 3/	0.172	0.000	0.172	0.1	0.0	0.0
Total	86.240	79.243	152.513	100.0	141.5	140.5

Total may not add due to rounding.

1/ Major countries include Switzerland, Norway, Iceland, and former Yugoslav states.

2/ The former 15 Republics of the Soviet Union, not including the 3 Baltic Republics.

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

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

Import Products

Agricultural imports shipped during the first half of fiscal 2015 totaled \$57 billion; an additional \$60 billion is projected for the second half of the year. This represents 7 percent more imports than in 2014 as the domestic economy continues to grow and the dollar's higher purchasing power boosts consumer spending. Although the \$57 billion worth of imports in the past two quarters account for around 48 percent of total fiscal year imports (based on 2014's first-half share), estimated imports during the second half of 2015 are reduced by the smaller projection for sugar and tropical products due to lower prices for cocoa beans and natural rubber.

From October 2014 to March 2015, the dollar appreciated 8 percent from the preceding 6 months, which helped boost U.S. import demand. The recent harsh winter season, however, slowed domestic spending on food. Nevertheless, the 5-percent growth of disposable personal income from October to March (in chained 2009 dollars), as compared to 2.8-percent growth in the preceding two quarters, points toward stronger import demand this year than in 2014 (when imports increased 5 percent). Except for oilseeds and products as a group, imports of other food and farm products in 2015 are projected to increase from values in 2014. Horticultural products, tropical products, and livestock products account for \$8 billion more in imports expected this year.

World food prices are 12 percent lower in the recent October-March period than during the April-September period last year. This is partly due to food trade being largely priced in dollars, but mainly because of an abundant global supply of grains and oilseeds. Most farm commodity prices are lower during the second fiscal quarter in 2015 than during the same months in 2014, especially for tropical products like cocoa beans, coconut and palm oils, and rubber. The overall U.S. import unit value is up 6 percent thus far this fiscal year.

Despite lower prices for natural rubber and cocoa beans, the average import unit value for tropical products (including sugar and coffee beans) is up 6 percent thus far this fiscal year. U.S. import volume for tropical products, except vegetable oils, is down 1.6 percent. The more volatile price changes for tropical commodities relative to horticultural products (such as fruits, vegetables, or wine) have resulted in low reliability of their short-term projections in the past. Thus, even as import volumes for tropical products are more predictable relative to their prices, import values for individual commodities are not easy to estimate. The projection for sugar and tropical products in fiscal 2015 is \$24.8 billion, up 7 percent from 2014 but \$1.8 billion smaller than the last forecast.

The import value of horticultural products is more than twice that of tropical commodities and their past projections have been highly reliable compared to the latter. Accurate projections for fresh fruits, fresh vegetables, and processed vegetables indicate that import demand for these products is steady and comparatively predictable. Shipments of horticulture products arrive about equally between the two halves of the fiscal year, whereas more tropical products are shipped during April-September than during October-March. An estimated \$51.1 billion worth of horticulture imports are expected in 2015, up \$4.1 billion from 2014. Since 1992, horticulture imports experienced a decline only in 2009. Import volume growth averaged 4.1 percent annually over the past decade, and import value grew 7.1 percent on average during the same period.

Cattle imports this year are anticipated to be \$500 million ahead of 2014. Because of larger domestic supply and lower unit values, swine imports are projected to be about the same as in 2014, at \$400 million. The 2015 forecast for beef and veal imports amounts to \$6.6 billion, or \$1.9 billion more than in 2014, as tight domestic supplies of processing meat support strong demand for imported lean beef. The strong dollar makes the United States an attractive market vis-à-vis competing buyers.

Abundant domestic and world supplies of food and feed grains have kept grain prices and U.S. import volumes low. Thus, U.S. imports of grains, feeds, and processed grain products amount to an estimated \$11.1 billion, a slight increase from \$10.9 billion in 2014. The \$200-million projected import gain is mostly attributed to an additional \$400 million in shipments of processed grain products, whose volume is projected up 300,000 metric tons in 2015. For imported oilseeds and oilseed products, however, lower unit values for oilseeds and oilmeal combine to account for their smaller import values. Plentiful domestic supply of rape/colza seeds is largely behind the projected nearly \$300-million decline in oilseeds and oilseed product imports.

Table 5--U.S. agricultural imports: Value and volume, by commodity, 2014-15

Commodity	October-March		Fiscal 2014	Forecast fiscal year 2015	
	2014	2015		Feb	May
	VALUE -- Billion dollars --				
Livestock, dairy, & poultry	7.344	10.019	16.029	17.8	18.3
Livestock and meats	5.398	7.851	12.053	13.7	14.1
Cattle and calves	1.093	1.548	2.124	2.6	2.6
Swine	0.175	0.203	0.408	0.4	0.4
Beef and veal	1.895	3.572	4.729	6.1	6.6
Pork	0.755	0.891	1.686	1.5	1.3
Dairy products	1.600	1.805	3.276	3.4	3.5
Cheese	0.620	0.688	1.229	1.4	1.5
Grains and feed	5.293	5.396	10.850	11.0	11.1
Grain products	3.177	3.327	6.507	6.9	6.9
Oilseeds and products	4.459	4.298	9.880	9.7	9.6
Vegetable oils	2.596	2.545	5.376	5.4	5.3
Horticulture products	23.453	24.819	46.975	51.4	51.1
Fruits, fresh	4.915	5.398	9.457	10.0	10.9
Fruits, processed	2.315	2.462	4.731	5.2	5.0
Fruit juices	0.948	0.960	1.839	2.0	1.9
Nuts, whole and processed	0.959	1.221	2.073	2.7	2.7
Vegetables, fresh	3.802	3.882	6.651	7.5	7.0
Vegetables, processed	2.154	2.210	4.341	4.7	4.5
Wine	2.676	2.628	5.488	5.9	5.6
Malt beer	1.781	1.975	4.084	4.4	4.5
Essential oils	1.378	1.502	2.989	3.4	3.3
Cut flowers & nursery stock	0.877	0.896	1.711	1.8	1.8
Sugar & tropical products	10.864	11.350	23.218	26.6	24.8
Sweeteners & products	2.151	2.211	4.727	4.4	4.8
Confections	0.790	0.785	1.664	1.8	1.7
Cocoa and products	2.446	2.262	4.698	5.2	4.4
Coffee and products	2.447	3.069	6.009	7.2	7.3
Rubber, natural	1.177	0.768	2.141	2.2	1.8
Other imports ^{1/}	1.209	0.952	2.231	2.4	2.0
Total agricultural imports	52.622	56.833	109.184	119.0	117.0
VOLUME -- Million metric tons ^{2/--}					
Wine ^{2/}	0.581	0.559	1.144	1.2	1.2
Malt beer ^{2/}	1.512	1.622	3.424	3.6	3.7
Fruit juices ^{2/}	2.304	2.336	4.325	4.5	4.4
Cattle and calves ^{3/}	1.255	1.345	2.233	2.3	2.3
Swine ^{3/}	2.272	2.584	4.752	4.9	5.1
Beef and veal	0.373	0.567	0.887	1.0	1.1
Pork	0.195	0.255	0.413	0.4	0.4
Fruits, fresh	5.288	5.385	10.852	11.0	11.0
Fruits, processed	0.805	0.878	1.673	1.8	1.8
Vegetables, fresh	3.664	3.644	6.404	6.8	6.4
Vegetables, processed	1.638	1.692	3.325	3.5	3.5
Vegetable oils	2.061	2.066	4.178	4.4	4.2
Cocoa and products	0.719	0.623	1.332	1.3	1.2
Coffee and products	0.726	0.691	1.589	1.6	1.6

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

Imports from Canada are reduced by about \$800 million to \$23.3 billion because of lower than expected second-quarter shipments of soybeans, rapeseeds, rapeseed meal and oil, fruits, and vegetables. The extreme winter conditions were in part responsible for the weak import demand during the January-March period. Import estimates with respect to other regions, such as Asia and Sub-Saharan Africa, are also reduced due to lower commodity prices for palm oil, natural rubber, cocoa paste, and cocoa powder. Imports from Central America are lowered as shipments from Costa Rica in the second quarter were slower than expected. Shipments of horticultural products from Argentina and tobacco products from Brazil were also smaller than expected in the second quarter, which cut their import projections for the year. Lower import unit values for vegetable oils as a group, oilcake and meal, other oilseed products, planting seeds, processed fruit, and other tropical products during the first half of the fiscal year are behind the downward adjustment in import values from their suppliers, such as Indonesia, Malaysia, the Philippines and Thailand.

Second-quarter beef and veal imports were stronger from these major suppliers—Australia, New Zealand, Canada, Mexico, Brazil, Nicaragua, and Uruguay. Imports have increased as U.S. beef production has remained low over the past year. As domestic herd rebuilding progresses, cow slaughter has fallen, lowering domestic supplies of processing beef and increasing demand for imported processing beef. Although shipments have risen from all the aforementioned suppliers, imports from Australia have risen by the greatest amount. Australia has been liquidating its cattle herd due to continued drought and thus its exports have surged over the same period. The pace of dairy product imports from New Zealand, Canada, Italy, and Mexico was also faster in the most recent quarter.

Table 6--U.S. agricultural imports: Value by region, 2014-15

Region and country	October-March		Fiscal 2014	Forecast fiscal year 2015	
	2014	2015		Feb	May
	VALUE	-- Billion dollars--			
Western Hemisphere	29.485	31.818	60.568	66.1	64.5
Canada	10.969	11.183	22.816	24.1	23.3
Mexico	9.687	10.541	18.862	20.7	20.5
Central America	2.052	2.454	4.770	5.7	5.2
Costa Rica	0.710	0.726	1.559	1.7	1.6
Guatemala	0.810	0.974	1.827	2.1	2.1
Other Central America	0.531	0.754	1.384	1.8	1.6
Caribbean	0.211	0.240	0.504	0.6	0.6
South America	6.567	7.400	13.615	15.2	14.9
Argentina	0.777	0.687	1.542	1.5	1.4
Brazil	1.503	1.885	3.674	4.3	4.1
Chile	1.504	1.623	2.745	3.0	3.0
Colombia	1.125	1.310	2.358	2.7	2.7
Peru	0.803	1.000	1.559	1.8	1.9
Other South America	0.855	0.893	1.738	1.9	1.8
Europe and Eurasia	9.658	10.302	20.122	21.4	21.4
European Union-28	8.973	9.495	18.735	19.6	19.8
Other Europe	0.638	0.697	1.273	1.4	1.4
Asia	8.938	9.061	18.700	20.1	18.6
East Asia	2.892	2.829	5.754	5.9	5.9
China	2.203	2.123	4.338	4.4	4.4
Other East Asia	0.689	0.707	1.417	1.5	1.5
Southeast Asia	4.581	4.456	9.722	10.0	9.2
Indonesia	1.545	1.358	3.094	2.9	2.8
Malaysia	0.747	0.646	1.500	1.5	1.2
Thailand	1.099	1.034	2.242	2.3	2.1
Vietnam	0.630	0.893	1.658	2.0	2.1
Other Southeast Asia	0.560	0.526	1.228	1.3	1.1
South Asia	1.465	1.776	3.223	4.2	3.5
India	1.349	1.622	2.968	3.9	3.3
Oceania	2.495	3.779	5.902	7.6	8.9
Australia	1.396	2.290	3.341	4.4	5.2
New Zealand	1.049	1.430	2.460	3.1	3.7
Africa	1.442	1.250	2.677	2.6	2.3
Sub-Saharan	1.250	0.999	2.337	2.2	1.9
Ivory Coast	0.741	0.466	1.146	0.6	0.7
Middle East	0.604	0.622	1.215	1.3	1.2
Turkey	0.384	0.399	0.786	0.9	0.8
World total	52.622	56.833	109.184	119.0	117.0

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 2009-14				Forecast accuracy Fiscal 2009-14					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	18	11	5	3	2	-	-	X	X	X	60
Wheat	20	12	9	6	4	-	-	-	-	X	20
Rice	8	7	10	5	3	-	-	-	X	X	40
Coarse grains	39	27	14	5	2	-	-	-	X	X	40
Corn	39	27	15	6	2	-	-	-	-	X	20
Feeds and fodders	11	11	10	5	3	-	-	-	X	X	40
Oilseeds and products	16	11	8	4	1	-	-	-	X	X	40
Soybeans	15	11	9	5	2	-	-	-	X	X	40
Soybean meal	26	21	15	7	2	-	-	-	-	X	20
Soybean oil	28	19	17	9	1	-	-	-	-	X	20
Livestock, poultry, and dairy	12	8	5	3	1	-	-	X	X	X	60
Livestock products	9	6	3	2	2	-	-	X	X	X	60
Beef and veal	14	10	7	6	2	-	-	-	-	X	20
Pork	11	6	5	3	3	-	-	X	X	X	60
Beef and pork variety meats	18	17	16	9	12	-	-	-	-	-	0
Hides, skins, and furs	16	15	13	9	5	-	-	-	-	X	20
Poultry and products	5	7	8	5	3	X	-	-	X	X	60
Broiler meat	7	8	8	4	3	-	-	-	X	X	40
Dairy products	32	25	17	9	4	-	-	-	-	X	20
Tobacco, unmanufactured	7	6	3	9	2	-	-	X	-	X	40
Cotton	27	15	7	4	2	-	-	-	X	X	40
Planting seeds	9	8	13	10	5	-	-	-	-	X	20
Horticultural products	4	4	3	2	1	X	X	X	X	X	100
Fruits and vegetables, fresh	6	6	4	3	2	-	-	X	X	X	60
Fruits and veget., processed	5	4	3	3	2	X	X	X	X	X	100
Tree nuts	7	7	5	3	2	-	-	X	X	X	60
Sugar and tropical products	10	7	6	4	2	-	-	-	X	X	40
Major bulk products	19	9	6	2	1	-	-	-	X	X	40
Total agricultural exports	10	6	3	1	1	-	-	X	X	X	60
Average error & accuracy	15	11	9	5	3	10%	7%	34%	66%	97%	43
Export volume											
Wheat	7	5	9	7	4	-	X	-	-	X	40
Rice	12	11	9	5	2	-	-	-	X	X	40
Coarse grains	26	20	13	7	2	-	-	-	-	X	20
Corn	27	21	14	7	2	-	-	-	-	X	20
Feeds and fodders	14	14	10	7	6	-	-	-	-	-	0
Soybeans	12	11	8	5	2	-	-	-	X	X	40
Soybean meal	15	11	8	4	2	-	-	-	X	X	40
Soybean oil	23	19	16	10	4	-	-	-	-	X	20
Beef and veal	12	8	6	4	0	-	-	-	X	X	40
Pork	8	5	3	1	2	-	X	X	X	X	80
Beef and pork variety meats	11	11	11	6	9	-	-	-	-	-	0
Broiler meat	6	5	4	4	3	-	X	X	X	X	80
Tobacco, unmanufactured	0	0	8	8	0	X	X	-	-	X	60
Cotton	11	10	8	5	3	-	-	-	X	X	40
Major bulk products	8	8	5	3	2	-	-	X	X	X	60
Average error & accuracy	13	11	9	6	3	7%	27%	20%	53%	87%	39

- = Error exceeds 5 percent.

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

Country/region	Average absolute forecast errors Fiscal 2009-14					Forecast accuracy Fiscal 2009-14					Forecast
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	accuracy
Export value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Asia	17	8	6	3	1	-	-	-	X	X	40
East Asia	13	9	7	3	2	-	-	-	X	X	40
Japan	10	6	5	4	2	-	-	X	X	X	60
China	18	15	13	10	8	-	-	-	-	-	0
Hong Kong	16	13	8	7	4	-	-	-	-	X	20
Taiwan	14	8	7	5	6	-	-	-	X	-	20
South Korea	23	19	15	10	3	-	-	-	-	X	20
Southeast Asia	13	10	9	6	3	-	-	-	-	X	20
Indonesia	23	15	11	7	2	-	-	-	-	X	20
Philippines	17	12	8	5	2	-	-	-	X	X	40
Malaysia	15	11	13	11	8	-	-	-	-	-	0
Thailand	22	20	13	6	4	-	-	-	-	X	20
Vietnam	34	34	10	1	2	-	-	-	X	X	40
South Asia	20	22	22	18	14	-	-	-	-	-	0
India	30	30	9	4	6	-	-	-	X	-	20
Western Hemisphere	8	4	3	2	1	-	X	X	X	X	80
North America	8	4	3	2	1	-	X	X	X	X	80
Canada	6	4	2	1	1	-	X	X	X	X	80
Mexico	12	6	5	4	3	-	-	X	X	X	60
Caribbean	4	6	4	6	4	X	-	X	-	X	40
Dominican Republic	38	38	13	7	7	-	-	-	-	-	0
Central America	12	11	10	4	4	-	-	-	X	X	40
South America	20	15	10	7	4	-	-	-	-	X	20
Brazil	39	35	29	29	7	-	-	-	-	-	0
Colombia	37	34	20	12	4	-	-	-	-	X	20
Peru	49	49	28	7	7	-	-	-	-	-	0
Venezuela	13	10	8	8	5	-	-	-	-	X	20
Europe and Eurasia	15	10	7	6	3	-	-	-	-	X	20
European Union-27	20	14	12	7	3	-	-	-	-	X	20
Other Europe	21	25	25	25	7	-	-	-	-	-	0
FSU-12	10	10	12	11	8	-	-	-	-	-	0
Russia	17	19	20	18	6	-	-	-	-	-	0
Middle East	18	12	10	7	4	-	-	-	-	X	20
Turkey	25	13	12	9	6	-	-	-	-	-	0
Saudi Arabia	16	15	15	7	3	-	-	-	-	X	20
Africa	28	20	10	9	5	-	-	-	-	X	20
North Africa	47	33	13	14	9	-	-	-	-	-	0
Egypt	37	25	15	15	8	-	-	-	-	-	0
Sub-Saharan Africa	13	13	11	7	6	-	-	-	-	-	0
Nigeria	40	35	6	6	3	-	-	-	-	X	20
Oceania	24	14	12	10	4	-	-	-	-	X	20
Average error and accuracy	21	17	11	8	5	2%	7%	15%	29%	63%	23

- = Error exceeds 5 percent.

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

Commodity	Average absolute forecast errors Fiscal 2009-14					Forecast accuracy Fiscal 2009-14					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	8	6	4	4	2	-	-	X	X	X	60
Livestock and meats	7	5	4	4	3	-	X	X	X	X	80
Cattle and calves	18	11	7	7	4	-	-	-	-	X	20
Swine	31	26	21	11	11	-	-	-	-	-	0
Beef and veal	8	9	8	8	4	-	-	-	-	X	20
Pork	11	9	6	6	4	-	-	-	-	X	20
Dairy products	11	10	6	5	3	-	-	-	X	X	40
Cheese	13	6	6	6	5	-	-	-	-	X	20
Grains and feed	6	6	6	4	1	-	-	-	X	X	40
Grain products	4	2	4	3	1	X	X	X	X	X	100
Oilseeds and products	18	13	17	10	4	-	-	-	-	X	20
Vegetable oils	19	14	16	11	4	-	-	-	-	X	20
Horticulture products	4	4	4	3	1	X	X	X	X	X	100
Fruits, fresh	5	5	2	4	1	X	X	X	X	X	100
Fruits, preserved	18	16	13	9	2	-	-	-	-	X	20
Fruit juices	29	23	15	9	4	-	-	-	-	X	20
Nuts and preparations	18	12	8	5	5	-	-	-	X	X	40
Vegetables, fresh	7	7	8	3	1	-	-	-	X	X	40
Vegetables, processed	6	4	3	3	1	-	X	X	X	X	80
Wine	7	6	5	4	1	-	-	X	X	X	60
Malt beer	6	5	3	3	3	-	X	X	X	X	80
Essential oils	9	6	5	3	3	-	-	X	X	X	60
Cut flowers and nursery stock	4	3	2	1	1	X	X	X	X	X	100
Sugar and tropical products	17	16	13	8	4	-	-	-	-	X	20
Sweeteners and products	35	31	26	15	14	-	-	-	-	-	0
Confections	7	7	2	3	1	-	-	X	X	X	60
Cocoa and products	10	10	10	8	5	-	-	-	-	X	20
Coffee beans and products	22	18	13	7	3	-	-	-	-	X	20
Natural rubber	47	44	39	29	13	-	-	-	-	-	0
Other imports	13	15	14	7	3	-	-	-	-	X	20
Total agricultural imports	8	6	6	5	2	-	-	-	X	X	40
Average error and accuracy	14	11	10	7	4	13%	23%	35%	52%	90%	43
Import volume											
Wine (HL)	12	11	6	3	3	-	-	-	X	X	40
Malt beer (HL)	6	4	3	4	3	-	X	X	X	X	80
Fruit juices (HL)	12	15	9	4	3	-	-	-	X	X	40
Cattle and calves	10	7	6	10	2	-	-	-	-	X	20
Swine	7	3	2	2	1	-	X	X	X	X	80
Beef and veal	16	15	9	7	7	-	-	-	-	-	0
Pork	0	0	13	13	8	X	X	-	-	-	40
Fruits--fresh	3	3	2	3	2	X	X	X	X	X	100
Fruits--processed	10	7	3	3	1	-	-	X	X	X	60
Vegetables--fresh	3	4	3	4	1	X	X	X	X	X	100
Vegetables--processed	5	3	3	2	1	X	X	X	X	X	100
Vegetable oils	5	3	5	6	2	X	X	X	-	X	80
Cocoa and products	7	4	6	8	5	-	X	-	-	X	40
Coffee beans and products	8	5	6	4	2	-	X	-	X	X	60
Average error and accuracy	7	6	5	5	3	36%	64%	50%	64%	86%	60

- = 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 2009-14					Forecast accuracy Fiscal 2009-14					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	6	4	4	4	2	-	X	X	X	X	80
Canada	9	6	4	5	2	-	-	X	X	X	60
Mexico	6	6	3	4	1	-	-	X	X	X	60
Central America	9	6	11	8	2	-	-	-	-	X	20
Costa Rica	9	4	4	5	3	-	X	X	X	X	80
Guatemala	8	5	11	8	4	-	X	-	-	X	40
Other Central America	16	13	18	13	4	-	-	-	-	X	20
Caribbean	16	9	9	9	0	-	-	-	-	X	20
South America	8	4	5	4	3	-	X	X	X	X	80
Argentina	23	12	15	11	7	-	-	-	-	-	0
Brazil	11	6	5	9	6	-	-	X	-	-	20
Chile	5	8	6	3	1	X	-	-	X	X	40
Colombia	10	7	8	5	2	-	-	-	X	X	40
Other South America	18	7	6	4	3	-	-	-	X	X	40
Europe and Eurasia	6	6	4	2	1	-	-	X	X	X	60
European Union-27	7	6	3	2	1	-	-	X	X	X	60
Other Europe	13	7	17	16	7	-	-	-	-	-	0
Asia	16	12	14	10	4	-	-	-	-	X	20
East Asia	9	10	8	5	2	-	-	-	X	X	40
China	10	12	9	6	3	-	-	-	-	X	20
Other East Asia	4	9	7	5	2	X	-	-	X	X	40
Southeast Asia	19	15	18	13	5	-	-	-	-	X	20
Indonesia	23	19	23	18	7	-	-	-	-	-	0
Malaysia	30	18	24	19	8	-	-	-	-	-	0
Thailand	17	14	16	12	4	-	-	-	-	X	20
Other Southeast Asia	13	11	10	6	1	-	-	-	-	X	20
South Asia	38	29	31	21	6	-	-	-	-	-	0
India	38	29	31	23	8	-	-	-	-	-	0
Oceania	9	6	10	9	5	-	-	-	-	X	20
Australia	9	5	9	8	6	-	X	-	-	-	20
New Zealand	10	6	9	11	4	-	-	-	-	X	20
Africa	15	13	12	9	4	-	-	-	-	X	20
Sub-Saharan Africa	14	13	13	8	3	-	-	-	-	X	20
Ivory Coast	15	18	19	19	11	-	-	-	-	-	0
Middle East	9	7	8	3	2	-	-	-	X	X	40
Turkey	12	9	15	9	3	-	-	-	-	X	20
Average error & accuracy	14	10	12	9	4	6%	14%	22%	36%	75%	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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