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Outlook for U.S. Agricultural Trade

FY 2017 Exports Forecast Up \$1.0 Billion at \$134.0 Billion; Imports at \$112.5 Billion

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The next release is
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World Agricultural
Outlook Board.

Fiscal year 2017 agricultural exports are projected at \$134.0 billion, up \$1.0 billion from the August forecast, largely due to expected increases in dairy and livestock byproduct exports. While beef and pork forecasts remain unchanged, dairy is forecast \$500 million higher at \$5.3 billion. Grain and feed exports are forecast up \$300 million to \$29.6 billion, driven primarily by stronger wheat volumes and unit values as well as by corn volumes, helping to offset expected declines in rice exports. Cotton exports are forecast at \$4.4 billion, a \$200 million increase, due to a poor harvest in Brazil and production uncertainty in India. Soybean export volumes continue to set records, raising the soybean forecast \$500 million, which is countered by expected declines in soybean meal, soybean oil and other oilseed products. Overall, the oilseed and product forecast remains unchanged at \$31.0 billion.

Forecasts to China and Mexico received the largest upward adjustments, each increasing \$300 million. China continues to be forecast as the top market for fiscal year 2017 at \$21.8 billion, followed by Canada (\$21.3 billion) and Mexico (\$18.3 billion).

U.S. agricultural imports in fiscal year 2017 are forecast at \$112.5 billion, down \$1.0 billion from the August forecast. Reduced imports of horticultural, sugar, and tropical products are leading the forecast decline. As a result, the U.S. agricultural trade surplus is expected to increase to \$21.5 billion in fiscal 2017.

Table 1--U.S. agricultural trade, fiscal years 2011-17, year ending September 30

Item	2011	2012	2013	2014	2015	2016	Forecast fiscal year*	
							2017 Aug.	Nov.
<i>Billion dollars</i>								
Exports	137.5	135.9	141.1	152.3	139.7	129.7	133.0	134.0
Imports	94.5	103.4	103.9	109.3	114.2	113.1	113.5	112.5
Balance	43.0	32.5	37.3	43.1	25.5	16.6	19.5	21.5

*Reflect forecasts in the November 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.

Global Market Watchers Circumspect in Wake of U.S. Election

World per capita GDP growth at 1.2 percent in 2016 is expected to pick up to 1.6 percent in 2017. Per capita income growth in the key emerging markets of Brazil, Russia, India, Indonesia, and China is expected to be 3.7 percent in 2016, increasing to 4.4 percent in 2017 as recessions in Brazil and Russia abate. Global trade volume is expected to grow at only 1.3 percent in 2016 but to accelerate to 2.6 percent in 2017.

The election of Donald Trump as U.S. President has introduced an element of uncertainty as the emphasis of the next administration's economic policy agenda is unknown. On balance, markets have responded positively to early indications of a fiscal stimulus in the form of tax cuts and increased spending on infrastructure. Expectations for 2017 U.S. per capita GDP growth have thus been raised slightly to 1.2 percent. However, analysts are watching closely for the extent to which policies advocated during the campaign, such as restrictive immigration policies and high tariffs, will be pursued.

A change in the U.S. trade relationship with China and Mexico is of particular concern for agricultural competitiveness. Together, these two countries were the destination for an average of almost one-third of total U.S. agricultural exports from 2013-2015. China alone was the destination for roughly 60 percent of U.S. soybean exports, on average, during this period.

In contrast to the significant weakening of the British pound in the wake of the Brexit vote, the U.S. dollar strengthened with respect to most of the currencies of its closest trading partners and competitors in the first few days after the election. The dollar strengthened over 10 percent relative to the Mexican peso in the 2 days following the election. In general, emerging market currencies lost considerable value against the dollar over expectations that higher U.S. interest rates would trigger capital outflows. The agricultural exports-weighted dollar value index is expected to reflect a 2.6-percent appreciation in 2016 and maintain strength with a further 2.1-percent appreciation in 2017. The strong dollar is thus expected to continue to weigh on U.S. agricultural export competitiveness.

Oil prices have risen in 2016, recovering from lows in January and leveling off in recent months. In September, Brent crude oil prices reached \$46.57 per barrel, up from \$30.70 at the start of 2016. The U.S. Energy Information Administration forecasts a Brent crude spot price of \$50.91 per barrel for 2017, indicating that recent prices reflect expected tightening in energy market conditions into next year. However, uncertainty in future oil prices has increased, as indicated by the expanding range of futures and options contract values. Expectations for 2016 and 2017 prices remain low compared to the past 5 years and will continue to provide farmers, manufacturers, fertilizer producers, and farm product exporters a low-cost environment.

Canadian economic growth rates are expected to improve in 2017. Industries outside of the energy sector are expected to drive growth while the energy sector slowly recovers. In Mexico, growth rates have been adjusted downward from the

previous forecast largely due to uncertainty regarding the U.S. president-elect's policies.

Per capita income growth in Asia and Oceania is expected to be stable at 3.5 percent in 2016 and 2017. Income growth in China is expected to be strong at 6.2 percent in 2016 and 5.9 percent in 2017. Unlike other emerging market currencies, the yuan remained relatively stable in the days after the U.S. election. This likely reflects continued government intervention to prevent significant depreciation that would spur capital flight as the economy slows. Indian income growth is likewise expected to be steady and robust at more than 6 percent in 2016 and 2017. Steady growth is expected in the rest of South and Southeast Asia, despite changes in leadership and medium-term concerns about debt levels, inflation, and slowing demand from China.

The Latin American region remains in recession in 2016 with per capita GDP falling 2.1 percent, largely because of persistent recessions in Brazil and Venezuela. In Venezuela, political unrest continues to grow and the recession is expected to continue in 2017, though a 1-year elimination of import tariffs on agricultural products was imposed to meet significant shortages. Recent reforms in Argentina have improved its outlook in 2017 and beyond, but uncertainty has increased in Brazil. Real dollar strengthening of over 5 percent relative to the Brazilian real in the first days after the election reflects expectations that higher U.S. interest rates will encourage capital outflows from Brazil.

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

Region/Country 3/	Real exchange rate 2/		Real GDP per capita		Share of World		Share of U.S.
	2016	2017	2016	2017	GDP	Population	Ag. exports
	Percent change		Growth rate		2013-15 Average		
World	2.6	2.1	1.2	1.6	100.0	100.0	100.0
NAFTA	7.5	-0.1	0.6	1.1	26.5	6.7	28.0
United States	--	--	0.7	1.2	22.4	4.5	--
Canada	3.1	-0.9	0.5	1.4	2.4	0.5	15.0
Mexico	14.7	1.1	0.8	0.9	1.6	1.7	12.9
Emerging Markets	2.7	0.7	3.7	4.4	21.2	44.9	20.4
Brazil	0.8	3.0	-4.0	0.0	3.3	2.8	0.9
Russia	4.0	-7.8	-0.7	1.1	2.3	2.0	0.6
India	0.5	-2.7	6.2	6.2	3.0	17.4	0.7
Indonesia	-3.4	0.3	4.1	4.2	1.3	3.6	1.8
China	4.8	3.6	6.2	5.9	11.3	19.1	16.3
Europe & Central Asia	3.0	2.0	1.3	1.4	28.7	11.6	9.8
Euro Zone	0.6	2.7	1.4	1.2	17.6	9.0	6.7
Ukraine	4.3	-7.4	1.6	2.9	0.2	0.6	0.1
Turkey	3.8	3.0	1.6	2.2	1.2	1.1	1.3
Asia & Oceania	-0.5	1.8	3.5	3.5	31.0	55.0	44.4
Japan	-9.9	0.8	0.7	0.9	7.8	1.8	8.5
South Korea	2.7	2.9	2.3	2.0	1.7	0.7	4.3
Australia	1.2	0.8	1.8	1.7	1.8	0.3	1.0
Other SE Asia 4/	3.4	2.8	3.4	3.3	1.5	4.0	5.1
Latin America	7.4	2.7	-2.1	0.4	8.1	8.6	10.1
Argentina	16.9	-12.5	-1.9	1.5	0.7	0.6	0.1
Other S. America 5/	2.3	0.2	1.2	1.7	3.2	1.6	2.9
Middle East & N. Africa	4.4	16.3	0.8	1.4	5.2	5.1	6.0
Sub-Saharan Africa	9.7	1.7	-0.2	0.7	2.2	13.1	1.6

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.

3/ Regional values for Real Exchange rates are growth in GDP-weighted average of country real exchange rate index. World real exchange rate is a U.S. agricultural exports-weighted index.

4/ Includes Malaysia, Philippines, Thailand, and Vietnam.

5/ Includes Chile, Colombia, Peru, Bolivia, Paraguay, and Uruguay.

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

Export Products

Fiscal year 2017 grain and feed exports are \$29.6 billion, up \$300 million from the August estimate due mainly to larger volumes of wheat and corn. Coarse grain exports are forecast at \$10.7 billion, up \$200 million, driven by corn. Corn exports are forecast at 56.5 million tons, up 1.5 million tons from August, supported by strong early-season sales and shipments in response to tight supplies in South America. Sorghum and feeds and fodders remain unchanged from the August estimate. Sorghum exports to China, although reduced from a year ago, continue at a steady pace. Wheat exports are forecast at \$5.4 billion, an increase of \$300 million based on larger volume and unit value. Reduced supplies in the European Union have provided an opportunity for U.S. wheat exports, particularly to North Africa. Rice exports are forecast at \$1.7 billion, down \$200 million based on lower unit values and volumes. Unit values are lower, impacted by record supplies, while volumes are reduced on lower shipments to Latin America.

Fiscal year 2017 oilseed and product exports are forecast at \$31.0 billion, unchanged from the August forecast. Rising soybean export value is offset by declines in soybean meal and oil and other oilseed products. Soybean export volume continues to set records, pushing the forecast value \$500 million higher. Unit values are reduced from the August forecast as improved yields added significantly to U.S. supplies. However, unit values remain marginally higher than in FY 2016. Limited soybean availability from South America is helping to drive early-season exports higher as China's demand remains strong. Soybean meal export value is reduced on both lower projected volume and unit value. An abundance of competitively priced grains is currently suppressing demand for soybean meal. Soybean oil export value is reduced on slowing export volume and expected large supplies of competing oils in the global market.

Fiscal year 2017 cotton exports are forecast at \$4.4 billion, up \$200 million from the August estimate and \$950 million above the final fiscal-2016 value. Poor harvest results in Brazil and uncertainty about the size of the India crop helped boost early-season sales, and U.S. export volume was raised. Forecast export volume for fiscal 2017 is up 100,000 MT to 2.6 million MT.

Fiscal 2017 livestock, dairy, and poultry exports are raised \$700 million to \$26.5 billion, largely due to dairy and livestock byproducts. Beef is unchanged at \$5.3 billion as higher volumes offset weaker prices. Pork is unchanged at \$4.7 billion on stable volumes and values. Forecast higher oil prices will spur a rise in prices for lard, tallow, and grease, buoying the value of shipments. Variety meat exports are forecast \$100 million higher to \$1.6 billion on increased supplies of pork variety meats and strong export demand. Poultry and products are forecast slightly lower to \$4.7 billion, as a decline in both broiler meat quantity and value is only partially offset by gains in other poultry meat and egg and egg products. The reduction in broiler meat is driven by lower prices. Gains by other poultry meat and egg and egg products are bolstered by rising volumes and prices. Dairy is increased by \$500 million to \$5.3 billion as key milk-producing countries reduce milk output, leading to higher global prices, and U.S. exports are expected to expand.

The forecast for horticultural products is unchanged at \$34.0 billion. Fresh fruit and vegetable exports are forecast unchanged at \$6.8 billion, with top markets including Canada, Europe, and Japan. Processed fruit and vegetable exports are forecast

unchanged at \$7.3 billion. Whole and processed tree nut exports are forecast unchanged at \$9.0 billion, with top markets including Europe and China.

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Table 3--U.S. agricultural exports: Value and volume by commodity, 2013-2017

Commodity	Fiscal year				Forecast	
	2013	2014	2015	2016	Fiscal year 2017 Aug.	Nov.
VALUE	<i>-- Billion dollars --</i>					
Grains and feeds 1/	31.423	36.420	31.687	29.613	29.3	29.6
Wheat 2/	10.126	8.260	5.911	5.138	5.1	5.4
Rice	2.228	2.018	2.041	1.900	1.9	1.7
Coarse grains 3/	6.191	12.474	11.054	10.791	10.5	10.7
Corn	5.571	11.084	8.797	9.154	9.4	9.6
Feeds and fodders	8.330	9.033	8.107	7.454	7.4	7.4
Oilseeds and products	32.073	34.916	31.680	29.485	31.0	31.0
Soybeans	20.887	24.104	21.624	20.435	21.2	21.7
Soybean meal 4/	5.502	5.723	5.243	4.173	4.4	4.2
Soybean oil	1.148	0.812	0.773	0.842	0.9	0.8
Livestock, dairy, and poultry	31.492	33.804	29.243	25.563	25.8	26.5
Livestock products	18.881	19.991	18.207	16.445	16.3	16.5
Beef and veal 5/	5.217	6.035	5.846	5.186	5.3	5.3
Pork 5/	5.167	5.751	4.974	4.748	4.7	4.7
Beef and pork variety meats 5/	1.498	1.530	1.532	1.585	1.5	1.6
Hides, skins, and furs	3.058	2.989	2.625	1.889	1.9	1.9
Poultry and products	6.489	6.408	5.479	4.543	4.8	4.7
Broiler meat 5/ 6/	4.292	4.097	3.358	2.777	3.0	2.9
Dairy products	6.122	7.405	5.557	4.576	4.8	5.3
Tobacco, unmanufactured	1.193	1.114	1.250	1.046	1.1	1.1
Cotton	5.604	4.598	4.133	3.443	4.2	4.4
Seeds	1.599	1.721	1.570	1.601	1.5	1.5
Horticultural products 7/	31.413	33.444	34.089	32.957	34.0	34.0
Fruits and vegetables, fresh	7.337	7.425	7.197	6.993	6.8	6.8
Fruits and vegetables, processed	7.139	7.610	7.382	7.400	7.3	7.3
Tree nuts, whole and processed	7.164	8.132	8.911	7.632	9.0	9.0
Sugar and tropical products 8/	6.297	6.290	6.078	6.010	6.0	6.0
Major bulk products 9/	46.229	52.568	46.013	42.754	44.0	45.0
Total	141.139	152.322	139.742	129.726	133.0	134.0
VOLUME	<i>--- Million metric tons ---</i>					
Wheat 2/	31.110	27.091	21.387	22.458	25.0	25.6
Rice	3.868	3.374	3.948	3.900	4.1	4.0
Coarse grains 3/	20.453	56.624	56.313	59.195	61.6	63.1
Corn	18.176	50.599	46.758	51.135	55.0	56.5
Feeds and fodders	18.848	27.812	21.587	22.277	21.9	21.9
Soybeans	35.002	45.207	50.374	54.105	52.3	55.8
Soybean meal 4/	10.111	10.504	11.891	10.853	11.1	10.9
Soybean oil	0.981	0.852	0.914	1.016	1.1	1.0
Beef and veal 5/	0.837	0.869	0.774	0.800	0.8	0.9
Pork 5/	1.692	1.763	1.690	1.732	1.8	1.8
Beef and pork variety meats 5/	0.754	0.743	0.695	0.764	0.8	0.9
Broiler meat 5/ 6/	3.337	3.353	2.996	2.908	3.2	3.1
Tobacco, unmanufactured	0.165	0.152	0.177	0.157	0.2	0.2
Cotton	2.862	2.177	2.514	2.191	2.5	2.6
Major bulk products 9/	93.460	134.624	134.715	142.005	145.7	151.3
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 products. 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 2017 are forecast at \$134.0 billion, \$1.0 billion higher than the August forecast. Dairy exports are forecast to increase \$500 million on expected smaller supplies from competitors leading to higher prices. Increases in grain and feed sales and cotton volumes also support regional gains.

Asia

The forecast for China is \$21.8 billion, which is \$300 million higher than the August forecast on the strength of expected increases in soybean volumes as South American availability remains limited. Strong Chinese demand for pork variety meats is also expected to boost the total.

Expected increases in corn volumes and higher dairy unit values will also serve to buoy exports to the region this fiscal year, in particular to Japan and South Korea. While forecasts to Japan and South Korea remain unchanged for November at \$11.0 billion and \$6.1 billion, respectively, Japan is the second largest destination for U.S. corn, while South Korea is the fourth largest. For U.S. dairy shipments, South Korea and Japan represent the fourth and fifth largest export markets.

Exports to Southeast Asia are forecast to remain steady at \$10.1 billion. Slight declines in soybean product exports are expected to be offset by increases in corn, soybeans, and cotton.

Western Hemisphere

The North American export total is forecast up \$400 million to \$39.6 billion. The forecast to Mexico increased \$300 million to \$18.3 billion on higher dairy unit values, corn volumes, soybeans, variety meats, cotton, and expected price increases for animal fats. Higher expected dairy prices raise the forecast to Canada by \$100 million to \$21.3 billion for fiscal 2017. While lower export volumes of rice are forecast across Latin America, overall exports to South America and Central America are unchanged at \$6.1 billion and \$3.7 billion, respectively.

Europe, Africa, and the Middle East

Exports to the EU are forecast to increase \$100 million to \$11.9 billion on stronger soybean sales, which more than offset declines in soybean meal.

Exports to Russia, Middle East, Africa, and Oceania are forecast to remain unchanged.

Table 4--U.S. agricultural exports: Value by region, 2013-2017

Country and region	Fiscal year			2016	Share of 2016 total	Forecast	
	2013	2014	2015			Fiscal year 2017	
						Aug.	Nov.
VALUE	<i>-- \$ Billion --</i>				<i>Percent</i>	<i>-- \$ Billion --</i>	
Asia	59.920	66.631	60.741	54.854	42.3	57.7	58.0
East Asia	47.816	53.487	47.965	42.087	32.4	45.3	45.6
Japan	12.420	13.363	11.691	10.614	8.2	11.0	11.0
China	23.361	25.695	22.611	19.171	14.8	21.5	21.8
Hong Kong	3.630	4.052	3.932	3.505	2.7	3.6	3.6
Taiwan	3.179	3.491	3.293	3.080	2.4	3.1	3.1
South Korea	5.204	6.869	6.422	5.708	4.4	6.1	6.1
Southeast Asia	10.361	11.444	10.629	10.273	7.9	10.1	10.1
Indonesia	2.620	2.964	2.441	2.386	1.8	2.5	2.5
Philippines	2.429	2.774	2.417	2.461	1.9	2.4	2.4
Malaysia	1.025	1.010	0.862	0.800	0.6	0.9	0.9
Thailand	1.446	1.613	1.713	1.470	1.1	1.6	1.6
Vietnam	2.066	2.230	2.405	2.355	1.8	2.1	2.1
South Asia	1.743	1.700	2.147	2.494	1.9	2.4	2.4
India	0.972	0.988	1.109	1.246	1.0	1.2	1.2
Western Hemisphere	53.424	56.673	53.724	51.463	39.7	52.4	52.7
North America	39.393	41.273	39.427	37.994	29.3	39.2	39.6
Canada	21.458	21.783	21.422	20.338	15.7	21.2	21.3
Mexico	17.935	19.490	18.005	17.656	13.6	18.0	18.3
Caribbean	3.652	3.659	3.363	3.278	2.5	3.4	3.4
Dominican Republic	1.132	1.293	1.179	1.110	0.9	1.1	1.1
Central America	3.311	3.776	3.817	3.809	2.9	3.7	3.7
South America	7.068	7.965	7.117	6.382	4.9	6.1	6.1
Brazil	1.557	1.642	0.778	0.803	0.6	0.8	0.8
Colombia	1.418	2.311	2.583	2.251	1.7	2.3	2.3
Peru	0.682	0.958	1.246	1.138	0.9	1.0	1.0
Venezuela	1.600	1.323	0.897	0.653	0.5	0.4	0.4
Europe/Eurasia	14.004	14.824	13.606	12.797	9.9	12.9	13.0
European Union-28 2/	11.548	12.695	12.309	11.645	9.0	11.8	11.9
Other Europe 3/	0.650	0.569	0.663	0.614	0.5	0.7	0.7
FSU-12 4/	1.805	1.561	0.634	0.537	0.4	0.4	0.4
Russia	1.316	1.165	0.406	0.370	0.3	0.3	0.3
Middle East	6.306	6.698	5.824	5.480	4.2	5.5	5.5
Turkey	2.177	2.090	1.573	1.366	1.1	1.3	1.3
Saudi Arabia	1.128	1.405	1.269	1.296	1.0	1.2	1.2
Africa	5.430	5.205	3.772	3.315	2.6	3.1	3.2
North Africa	2.759	2.833	1.860	1.635	1.3	1.4	1.5
Egypt	1.661	1.858	1.092	0.776	0.6	0.8	0.8
Sub-Saharan Africa	2.671	2.373	1.912	1.680	1.3	1.7	1.7
Nigeria	1.111	0.901	0.684	0.396	0.3	0.4	0.4
Oceania	1.895	2.118	2.076	1.817	1.4	1.9	1.9
Trans-shipments via Canada 5/	0.161	0.172	0.000	0.000	0.0	0.0	0.0
Total	141.139	152.322	139.742	129.726	100.0	133.0	134.0

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 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 three Baltic Republics.

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

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

Import Products

Agricultural imports in fiscal year 2017 are forecast at \$112.5 billion, down \$1.0 billion from the previous forecast and \$600 million below the total value of imports in fiscal year 2016. The expected decreases in total imports compared with the previous projections are largely due to reduced imports of horticultural and sugar and tropical products.

Horticultural product imports are expected to reach a new record of \$53.3 billion in fiscal year 2017, but this also represents a downward adjustment of \$600 million from the previous forecast. In fiscal year 2017, processed fruit imports are expected to fall \$300 million due to lower expected volumes and unit values compared with the August forecast. Fresh vegetable imports are adjusted downward \$200 million to \$7.6 billion, \$400 million below the record high in fiscal 2016, due to lower expected shipments, primarily from Mexico.

U.S. imports of sugar and tropical products are forecast to be worth \$22.8 billion in fiscal year 2017, a \$400 million downward adjustment from the previous forecast but \$600 million above fiscal year 2016. Coffee products are expected to be worth \$6.2 billion as volumes are forecast to be similar to fiscal 2016 but \$200 million below the previous forecast. Sweeteners and products imports are forecast to be worth \$4.7 billion, representing a \$200 million drop from the previous forecast, because volumes are now expected to just slightly outperform fiscal year 2016.

U.S. imports of livestock, dairy, and poultry are lowered \$200 million to \$15.6 billion as declines in pork and cattle more than offset increases in dairy products and miscellaneous products. Pork imports are lowered \$300 million to \$1.5 billion on weaker prices and volumes as U.S. supplies increase. Cattle imports are lowered \$300 million to \$1.4 billion as weaker cattle prices dampen demand. Alternatively, increased demand for dairy and products is forecast to raise shipments \$200 million to \$3.5 billion. Miscellaneous products, such as other live animals (in particular horses), are also expected to be higher.

Projected imports of oilseeds and products are increased \$200 million from the previous forecast to \$8.3 billion. Vegetable oils are forecast to increase in fiscal year 2017 in response to small increases in unit values expected for particular commodities, including rapeseed oil and olive oil. In addition, the volume of soybeans and rapeseed imported is projected to rise this fiscal year. Total grain and feed imports for fiscal 2017 remain unchanged at \$10.8 billion, \$100 million below fiscal 2016 as greater volumes of wheat and oat imports, compared with the previous year, are more than offset by lower imports of corn. The volume demanded for processed grain products is expected to hold steady relative to the previous forecast as well as to fiscal year 2016.

Table 5--U.S. agricultural imports: Value and volume by commodity, fiscal years 2013-17

Commodity	Fiscal year				Forecast	
	2013	2014	2015	2016	Fiscal year 2017	
					Aug.	Nov.
VALUE	-- \$ Billion --					
Livestock, dairy, & poultry	13.746	16.042	19.458	16.609	15.8	15.6
Livestock and meats	10.088	12.063	15.154	12.372	11.6	11.2
Cattle and calves	1.808	2.164	2.699	1.689	1.7	1.4
Swine	0.329	0.410	0.370	0.336	0.4	0.3
Beef and veal	3.675	4.730	7.208	5.380	4.7	4.7
Pork	1.417	1.690	1.707	1.706	1.8	1.5
Dairy products	3.005	3.277	3.491	3.371	3.3	3.5
Cheese	1.149	1.230	1.314	1.275	1.4	1.4
Grains and feed	11.296	10.857	10.926	10.935	10.8	10.8
Grain products	6.178	6.513	6.882	7.288	7.2	7.2
Oilseeds and products	8.838	9.895	8.752	8.453	8.1	8.3
Vegetable oils	5.243	5.369	5.351	5.420	5.3	5.4
Horticulture products	44.112	47.003	49.822	53.075	53.9	53.3
Fruits, fresh	8.341	9.443	10.184	11.228	11.3	11.3
Fruits, processed	4.718	4.733	5.137	5.123	5.4	5.1
Fruit juices	1.894	1.840	1.838	1.761	1.8	1.7
Nuts, whole and processed	1.814	2.077	2.587	2.607	2.8	2.8
Vegetables, fresh	6.544	6.658	6.905	7.999	7.8	7.6
Vegetables, processed	4.226	4.346	4.459	4.650	4.7	4.7
Wine	5.362	5.504	5.511	5.623	5.7	5.7
Malt beer	3.579	4.091	4.363	4.812	4.9	4.8
Essential oils	2.768	2.986	3.347	3.359	3.5	3.5
Cut flowers & nursery stock	1.667	1.713	1.734	1.813	1.8	1.8
Sugar & tropical products	23.465	23.231	23.530	22.217	23.2	22.8
Sweeteners & products	4.613	4.729	4.876	4.649	4.9	4.7
Confections	1.541	1.663	1.643	1.734	1.7	1.7
Cocoa and products	4.022	4.693	4.703	4.879	5.1	5.1
Coffee and products	6.057	6.015	6.400	5.934	6.4	6.2
Rubber, natural	2.673	2.138	1.575	1.306	1.3	1.3
Other imports 1/	2.413	2.233	1.748	1.819	1.7	1.8
Total agricultural imports	103.871	109.260	114.236	113.109	113.5	112.5
VOLUME	--- Million metric tons ---					
Wine 2/	1.184	1.148	1.166	1.200	1.2	1.2
Malt beer 2/	3.133	3.430	3.557	3.859	3.8	3.8
Fruit juices 2/	4.520	4.323	4.516	4.514	4.5	4.4
Cattle and calves 3/	2.031	2.251	2.321	1.712	1.8	1.6
Swine 3/	5.215	4.788	5.493	5.775	5.9	5.9
Beef and veal	0.733	0.887	1.195	1.005	1.0	0.9
Pork	0.371	0.414	0.492	0.493	0.5	0.5
Fruits, fresh	10.419	10.830	11.187	11.642	11.8	11.6
Fruits, processed	1.687	1.673	1.895	1.924	2.0	1.9
Vegetables, fresh	6.033	6.416	6.497	7.181	7.0	7.1
Vegetables, processed	3.208	3.322	3.457	3.601	3.6	3.6
Vegetable oils	3.973	4.175	4.410	4.701	4.7	4.8
Cocoa and products	1.258	1.329	1.293	1.299	1.3	1.3
Coffee and products	1.525	1.589	1.533	1.638	1.7	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

Regional imports from the Western Hemisphere are projected to fall in fiscal year 2017 by over \$500 million compared to 2016, down \$700 million from the previous forecast. This is largely due to a reduction in the expected supply from Mexico of horticultural and sugar and tropical products, in part due to uncertainty surrounding increasing volatility of the peso. However, Mexico is expected to remain the top supplier of agricultural products at \$22.0 billion, followed by Canada at \$21.7 billion. Unlike Mexico, the value of Canadian agricultural products sold to the United States is expected to increase slightly, due to growing values of oilseed products and steady horticultural product and grain and feed sales.

Fiscal year 2017 imports from the EU are expected to be \$100 million above the previous forecast at \$20.9 billion. These projections reflect the EU's continued strength in supplying processed horticultural and oilseed products, such as wine, essential oils, and olive oil to the United States. Therefore, the EU is expected to remain the third-largest supplier to the United States in 2017.

Imports from Asia are forecast down \$200 million to \$17.2 billion in fiscal year 2017 from the previous projection and \$400 million from fiscal year 2016. China is the largest supplier in the region and a major processed-fruits exporter to the United States. U.S. imports are expected to decrease for those agricultural items that China specializes in; therefore, China's potential access to the U.S. market is expected to decline.

Oceania's supply of agricultural products to the United States in fiscal year 2017 was cut by \$500 million in this forecast. Imports from Australia have been adjusted downward \$400 million, primarily due to expected reductions in the value of livestock and horticultural products sold to the United States. U.S. imports from New Zealand were cut \$100 million because increases in expected dairy sales are more than offset by decreases in livestock and horticultural imports.

Imports from South America are forecast down \$300 million from the previous forecast in fiscal year 2017 to \$13.3 billion. Chile is expected to have an increased value of shipments to the United States in fiscal year 2017, picking up market share of horticultural products like fresh fruit lost by other Latin American nations, including Mexico. However, Colombia is adjusted downward by \$200 million in response to lower expected sales of some products, including coffee and sweeteners.

Table 6--U.S. agricultural imports: Value by region, fiscal years 2013-17

Region and country	Fiscal year				Forecast	
	2013	2014	2015	2016	Fiscal year 2017	
					Aug.	Nov.
<i>-- \$ Billion --</i>						
VALUE						
Western Hemisphere	57.301	60.628	62.455	63.161	63.3	62.6
Canada	21.556	22.845	22.393	21.461	21.5	21.7
Mexico	17.219	18.878	20.680	22.514	22.7	22.0
Central America	4.694	4.762	5.050	5.098	5.0	5.1
Costa Rica	1.469	1.552	1.503	1.596	1.6	1.6
Guatemala	1.867	1.826	1.944	1.877	1.9	1.9
Other Central America	1.358	1.384	1.602	1.625	1.5	1.6
Caribbean	0.476	0.504	0.580	0.565	0.5	0.5
South America	13.356	13.639	13.752	13.524	13.6	13.3
Argentina	1.821	1.567	1.457	1.419	1.3	1.3
Brazil	3.760	3.675	3.534	3.302	3.1	3.1
Chile	2.843	2.744	2.808	3.022	3.0	3.2
Colombia	2.142	2.358	2.472	2.291	2.5	2.3
Peru	1.239	1.557	1.590	1.742	1.9	1.7
Other South America	1.551	1.740	1.890	1.748	1.8	1.7
Europe and Eurasia	18.653	20.133	21.411	22.098	22.4	22.5
European Union-28	17.328	18.742	19.709	20.407	20.8	20.9
Other Europe	1.212	1.277	1.449	1.530	1.6	1.5
Asia	19.411	18.709	18.737	17.570	17.4	17.2
East Asia	5.865	5.757	5.799	5.791	5.8	5.6
China	4.459	4.340	4.330	4.249	4.3	4.1
Other East Asia	1.406	1.417	1.468	1.542	1.5	1.5
Southeast Asia	9.607	9.723	9.666	9.380	9.2	9.2
Indonesia	3.127	3.094	2.912	2.804	2.7	2.7
Malaysia	1.690	1.502	1.249	1.070	0.9	0.9
Thailand	2.218	2.242	2.293	2.299	2.3	2.3
Vietnam	1.450	1.659	1.877	1.996	2.1	2.1
Other Southeast Asia	1.122	1.227	1.335	1.210	1.2	1.2
South Asia	3.940	3.228	3.273	2.399	2.2	2.2
India	3.696	2.972	2.952	2.098	1.9	1.9
Oceania	4.991	5.906	7.766	6.087	7.0	6.5
Australia	2.721	3.345	4.653	3.386	4.1	3.7
New Zealand	2.178	2.461	2.996	2.590	2.9	2.8
Africa	2.407	2.670	2.706	2.747	2.8	2.8
Sub-Saharan	2.064	2.330	2.223	2.333	2.4	2.4
Ivory Coast	0.890	1.137	0.918	1.005	1.0	1.0
Middle East	1.107	1.213	1.161	1.446	1.4	1.4
Turkey	0.709	0.784	0.737	0.984	0.9	0.9
World total	103.871	109.260	114.236	113.109	113.5	112.5

Totals may not add due to rounding.

Sources: USDA, 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 2016					Forecast accuracy Fiscal 2016					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	9	3	8	6	1	-	X	-	-	X	40
Wheat	30	7	3	0	3	-	-	X	X	X	60
Rice	5	5	5	5	0	-	-	-	-	X	20
Coarse grains	3	9	18	13	1	X	-	-	-	X	40
Corn	5	9	19	14	3	X	-	-	-	X	40
Feeds and fodders	7	6	8	8	2	-	-	-	-	X	20
Oilseeds and products	9	11	14	11	4	-	-	-	-	X	20
Soybeans	11	14	17	13	7	-	-	-	-	-	0
Soybean meal	4	4	11	9	4	X	X	-	-	X	60
Soybean oil	17	5	4	5	7	-	-	X	-	-	20
Livestock, poultry, and dairy	19	10	1	1	2	-	-	X	X	X	60
Livestock products	17	6	3	3	2	-	-	X	X	X	60
Beef and veal	20	8	3	0	0	-	-	X	X	X	60
Pork	7	7	10	7	3	-	-	-	-	X	20
Beef and pork variety meats	7	1	8	9	5	-	X	-	-	-	20
Hides, skins, and furs	54	32	6	6	1	-	-	-	-	X	20
Poultry and products	17	14	6	2	3	-	-	-	X	X	40
Broiler meat	15	12	1	0	3	-	-	X	X	X	60
Dairy products	27	22	7	3	2	-	-	-	X	X	40
Tobacco, unmanufactured	5	4	4	4	4	-	X	X	X	X	80
Cotton	7	7	7	10	4	-	-	-	-	X	20
Planting seeds	0	0	6	0	6	X	X	-	X	-	60
Horticultural products	11	11	5	2	1	-	-	-	X	X	40
Fruits and vegetables, fresh	9	9	2	0	0	-	-	X	X	X	60
Fruits and veget., processed	5	5	3	1	1	-	-	X	X	X	60
Tree nuts	28	28	18	5	2	-	-	-	X	X	40
Sugar and tropical products	1	1	1	1	1	X	X	X	X	X	100
Major bulk products	0	9	14	11	4	X	-	-	-	X	40
Total agricultural exports	7	1	4	4	2	-	X	X	X	X	80
Average error & accuracy	12	9	7	5	3	21%	24%	38%	52%	86%	44
Export volume											
Wheat	22	0	3	1	1	-	X	X	X	X	80
Rice	5	8	13	8	3	-	-	-	-	X	20
Coarse grains	2	9	16	13	2	X	-	-	-	X	40
Corn	8	10	18	15	3	-	-	-	-	X	20
Feeds and fodders	1	15	15	16	3	X	-	-	-	X	40
Soybeans	13	14	15	12	5	-	-	-	-	X	20
Soybean meal	2	0	6	4	1	X	X	-	X	X	80
Soybean oil	11	2	2	2	8	-	X	X	X	-	60
Beef and veal	0	0	1	1	0	X	X	X	X	X	100
Pork	4	4	1	0	2	X	X	X	X	X	100
Beef and pork variety meats	5	5	2	4	1	X	X	X	X	X	100
Broiler meat	10	7	1	1	0	-	-	X	X	X	60
Tobacco, unmanufactured	28	28	36	4	28	-	-	-	X	-	20
Cotton	0	0	4	9	4	X	X	X	-	X	80
Major bulk products	2	9	13	11	3	X	-	-	-	X	40
Average error & accuracy	8	7	10	7	4	53%	47%	47%	53%	87%	57

- = Error exceeds 5 percent.

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

Country/region	Average absolute forecast errors Fiscal 2016					Forecast accuracy Fiscal 2016					Forecast accuracy Percent
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
Export value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					
Asia	7	0	8	9	6	-	X	-	-	-	20
East Asia	10	1	7	7	6	-	X	-	-	-	20
Japan	13	6	2	2	2	-	-	X	X	X	60
China	7	5	9	9	6	-	-	-	-	-	0
Hong Kong	20	11	6	9	9	-	-	-	-	-	0
Taiwan	4	3	6	6	6	X	X	-	-	-	40
South Korea	12	9	9	9	9	-	-	-	-	-	0
Southeast Asia	3	2	10	15	9	X	X	-	-	-	40
Indonesia	5	4	25	25	8	X	X	-	-	-	40
Philippines	2	11	15	15	7	X	-	-	-	-	20
Malaysia	0	0	0	13	13	X	X	X	-	-	60
Thailand	9	9	9	5	5	-	-	-	X	X	40
Vietnam	7	7	6	15	15	-	-	-	-	-	0
South Asia	20	20	20	12	4	-	-	-	-	X	20
India	0	0	0	20	20	1	X	X	-	-	60
Western Hemisphere	6	2	1	1	0	-	X	X	X	X	80
North America	6	3	1	1	1	-	X	X	X	X	80
Canada	7	5	2	2	2	-	X	X	X	X	80
Mexico	5	2	1	1	1	X	X	X	X	X	100
Caribbean	4	4	4	1	4	X	X	X	X	X	100
Dominican Republic	6	6	22	22	14	-	-	-	-	-	0
Central America	3	3	3	3	3	X	X	X	X	X	100
South America	10	1	12	12	4	-	X	-	-	X	40
Brazil	0	38	38	38	25	X	-	-	-	-	20
Colombia	15	15	2	2	2	-	-	X	X	X	60
Peru	38	28	15	15	6	-	-	-	-	-	0
Venezuela	23	23	39	39	8	-	-	-	-	-	0
Europe and Eurasia	4	0	0	0	0	X	X	X	X	X	100
European Union-28	3	1	1	1	1	X	X	X	X	X	100
Other Europe	2	2	2	14	14	X	X	X	-	-	60
FSU-12	30	30	30	12	12	-	-	-	-	-	0
Russia	8	8	8	8	8	-	-	-	-	-	0
Middle East	8	6	1	0	0	-	-	X	X	X	60
Turkey	18	23	42	42	37	-	-	-	-	-	0
Saudi Arabia	7	7	7	0	7	-	-	-	X	-	20
Africa	15	3	3	10	6	-	X	X	-	-	40
North Africa	10	2	2	14	14	-	X	X	-	-	40
Egypt	29	3	3	3	3	-	X	X	X	X	80
Sub-Saharan Africa	19	7	7	5	1	-	-	-	X	X	40
Nigeria	22	44	44	44	55	-	-	-	-	-	0
Oceania	16	16	16	5	5	-	-	-	X	X	40
Average error and accuracy	11	9	11	11	9	32%	49%	41%	39%	41%	40

- = Error exceeds 5 percent.

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

Commodity	Average absolute forecast errors Fiscal 2016					Forecast accuracy Fiscal 2016					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	10	8	5	0	1	-	-	X	X	X	60
Livestock and meats	13	11	7	1	2	-	-	-	X	X	40
Cattle and calves	45	42	3	3	3	-	-	X	X	X	60
Swine	1	13	11	11	15	X	-	-	-	-	20
Beef and veal	17	11	7	3	3	-	-	-	X	X	40
Pork	18	14	18	0	0	-	-	-	X	X	40
Dairy products	4	4	1	4	1	X	X	X	X	X	100
Cheese	6	6	10	10	10	-	-	-	-	-	0
Grains and feed	2	2	1	1	0	X	X	X	X	X	100
Grain products	1	1	1	1	1	X	X	X	X	X	100
Oilseeds and products	12	12	6	4	2	-	-	-	X	X	40
Vegetable oils	4	4	3	0	2	X	X	X	X	X	100
Horticulture products	3	3	2	0	0	X	X	X	X	X	100
Fruits, fresh	1	1	1	1	1	X	X	X	X	X	100
Fruits, preserved	15	15	9	3	2	-	-	-	X	X	40
Fruit juices	20	20	14	2	2	-	-	-	X	X	40
Nuts and preparations	27	27	19	7	5	-	-	-	-	X	20
Vegetables, fresh	13	13	12	7	4	-	-	-	-	X	20
Vegetables, processed	1	1	1	1	1	X	X	X	X	X	100
Wine	3	3	3	1	0	X	X	X	X	X	100
Malt beer	3	3	2	2	0	X	X	X	X	X	100
Essential oils	7	7	7	7	1	-	-	-	-	X	20
Cut flowers and nursery stock	5	5	1	1	1	X	X	X	X	X	100
Sugar and tropical products	22	22	21	5	2	-	-	-	-	X	20
Sweeteners and products	6	6	5	5	2	-	-	-	-	X	20
Confections	5	5	4	2	1	X	X	X	X	X	100
Cocoa and products	8	8	9	7	0	-	-	-	-	X	20
Coffee beans and products	23	23	23	8	3	-	-	-	-	X	20
Natural rubber	68	68	45	7	7	-	-	-	-	-	0
Other imports	10	4	4	1	7	-	X	X	X	-	60
Total agricultural imports	8	8	5	1	0	-	-	X	X	X	60
Average error and accuracy	12	12	8	4	3	39%	39%	48%	68%	87%	56
Import volume											
Wine (HL)	4	4	4	0	0	X	X	X	X	X	60
Malt beer (HL)	2	2	2	2	2	X	X	X	X	X	80
Fruit juices (HL)	6	6	4	2	0	-	-	X	X	X	20
Cattle and calves	24	24	4	4	4	-	-	X	X	X	20
Swine	13	13	6	6	2	-	-	-	-	X	80
Beef and veal	4	3	10	0	0	X	X	-	X	X	33
Pork	9	9	2	2	2	-	-	X	X	X	33
Fruits--fresh	3	3	3	0	0	X	X	X	X	X	100
Fruits--processed	9	9	4	4	1	-	-	X	X	X	40
Vegetables--fresh	8	8	8	5	4	-	-	-	-	X	100
Vegetables--processed	3	3	3	0	0	X	X	X	X	X	60
Vegetable oils	4	4	4	0	0	X	X	X	X	X	40
Cocoa and products	8	8	8	8	0	-	-	-	-	X	0
Coffee beans and products	4	4	4	2	2	X	X	X	X	X	40
Average error and accuracy	7	7	5	2	1	50%	50%	71%	79%	100%	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 2016					Forecast accuracy Fiscal 2016					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	5	3	1	0	-	-	X	X	X	60
Canada	12	11	7	1	0	-	-	-	X	X	40
Mexico	3	3	5	1	1	X	X	X	X	X	100
Central America	8	8	6	2	2	-	-	-	X	X	40
Costa Rica	3	3	0	0	0	X	X	X	X	X	100
Guatemala	14	14	12	1	1	-	-	-	X	X	40
Other Central America	19	19	11	8	8	-	-	-	-	-	0
Caribbean	32	32	24	6	11	-	-	-	-	-	0
South America	10	10	8	3	1	-	-	-	X	X	40
Argentina	8	8	6	6	6	-	-	-	-	-	0
Brazil	15	15	12	3	3	-	-	-	X	X	40
Chile	6	6	4	1	1	-	-	X	X	X	60
Colombia	20	20	18	5	5	-	-	-	X	X	40
Peru	28	28	26	3	3	-	-	-	X	X	40
Other South America	4	4	3	3	3	X	X	X	X	X	100
Europe and Eurasia	2	2	2	1	0	X	X	X	X	X	100
European Union-27	2	2	2	1	0	X	X	X	X	X	100
Other Europe	4	4	2	5	5	X	X	X	X	X	100
Asia	16	16	9	1	0	-	-	-	X	X	40
East Asia	6	6	0	0	2	-	-	X	X	X	60
China	8	8	4	1	1	-	-	X	X	X	60
Other East Asia	6	6	3	3	3	-	-	X	X	X	60
Southeast Asia	12	12	6	0	1	-	-	-	X	X	40
Indonesia	6	6	3	3	0	-	-	X	X	X	60
Malaysia	27	27	12	7	3	-	-	-	-	X	20
Thailand	8	8	4	0	0	-	-	X	X	X	60
Vietnam	8	8	0	5	0	-	-	X	X	X	60
Other Southeast Asia	33	33	32	7	1	-	-	-	-	X	20
South Asia	61	61	50	4	4	-	-	-	X	X	40
India	69	69	57	5	5	-	-	-	X	X	40
Oceania	49	48	38	20	12	-	-	-	-	-	0
Australia	62	59	48	30	18	-	-	-	-	-	0
New Zealand	34	34	27	8	8	-	-	-	-	-	0
Africa	5	5	6	9	2	X	X	-	-	X	60
Sub-Saharan Africa	5	5	7	11	1	-	-	-	-	X	20
Ivory Coast	1	1	1	9	1	X	X	X	-	X	80
Middle East	2	2	4	10	10	X	X	X	-	-	60
Turkey	10	10	42	9	9	-	-	-	-	-	0
Average error & accuracy	16	16	13	5	3	24%	24%	42%	66%	79%	47

- = 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->

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