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Sugar and Sweeteners Outlook

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U.S. Sugar Market Outlook for 2017/18: Lower Production, More Deliveries, Resulting in Increased Imports

The next release is
June 15, 2017

Approved by the
World Agricultural
Outlook Board.

The May *World Agricultural Supply and Demand Estimates* (WASDE) reduced estimated U.S. sugar supplies by 65,000 short tons, raw value (STRV), to 13.957 million STRV. This is primarily due to less domestic beet sugar production, as reported sucrose extraction from sliced beets continues to be low compared with historical performance. Total use is raised 100,000 STRV to 12.480 million STRV, as reported deliveries for food and beverage use have been very strong through March, particularly from beet processors. The result is ending stocks estimated at 1.477 million STRV, which would result in a stocks-to-use ratio of 11.8 percent, down from the previous month's projection of 13.3 percent.

The U.S. sugar market in 2017/18 is projected to see supplies increase to 14.036 million STRV. Domestic production is expected to fall slightly, to 8.700 million STRV. Beet sugar production is slightly higher than the current 2016/17 estimate, as the lower reported planted area is expected to be offset by a return to historical average sugar per acre yields. Cane sugar is projected to be 3.750 million STRV, less than the 2016/17 estimate due to production in Florida and Louisiana having reverted to yields and recovery rates in line with historical averages and to no production occurring in Hawaii for the year. Projected imports are 3.858 million STRV, 18.9 percent higher than the previous year. Total use is projected to be 12.502 million STRV, a slight increase over the 2016/17 estimate, primarily due to a projected 1.0-percent increase in deliveries for food and beverage use. Ending stocks are projected to be 1.534 million STRV, resulting in a stocks-to-use ratio of 12.3 percent.

Mexico's sugar market in 2017/18 is projected to be very tight. Projected domestic production is 6.225 million metric tons, actual value (MT), a 0.6-percent increase from 2016/17's current estimate. Larger projected beginning stocks, however, result in total supplies increasing 4.7 percent. Domestic deliveries are projected to increase 1.4 percent, primarily due to higher deliveries for domestic consumption in line with population growth. Exports are projected to be 80.5 percent larger, however, as demand and market access to the United States is projected to nearly double, in line with the terms of the suspension agreements signed between the U.S. Department of Commerce (USDOC) and counterparts from Mexico in December 2014. Ending stocks are projected to be 731,000 MT, dropping the stocks-to-consumption ratio to 16.1 percent, compared with the 2016/17 estimate of 30.1 percent.

U.S. sugar production estimates reduced for 2016/17

The May USDA *World Agricultural Supply and Demand Estimates* (WASDE) estimates total U.S. sugar supplies to be 13.957 million short tons, raw value (STRV) for 2016/17, a 65,000-STRV reduction from the previous month. Beginning stocks are estimated at 2.053 million STRV, a reduction of less than 1,000 STRV, due to a revised figure submitted by a cane processor for inventory levels at the end of 2015/16.

Table 1 -- U.S. sugar: supply and use, by fiscal year (Oct./Sept.), May 2017.

Items	2015/16	2016/17 (estimate)	2016/17 (forecast)	2015/16	2016/17 (estimate)	2017/18 (forecast)
	1,000 Short tons, raw value			1,000 Metric tons, raw value		
Beginning stocks	1,815	2,053	1,477	1,647	1,863	1,340
Total production	8,989	8,774	8,700	8,155	7,959	7,893
Beet sugar	5,119	4,932	4,950	4,644	4,474	4,491
Cane sugar	3,870	3,842	3,750	3,511	3,485	3,402
Florida	2,173	2,051	2,000	1,971	1,861	1,814
Louisiana	1,428	1,612	1,600	1,296	1,462	1,451
Texas	116	136	150	106	123	136
Hawaii	152	43	0	138	39	0
Total imports	3,341	3,130	3,858	3,031	2,840	3,500
Tariff-rate quota imports	1,620	1,578	1,373	1,469	1,432	1,245
Other program imports	396	375	175	359	340	159
Non-program imports	1,325	1,177	2,311	1,202	1,068	2,096
Mexico	1,309	1,162	2,301	1,187	1,054	2,087
Total supply	14,145	13,957	14,036	12,832	12,662	12,733
Total exports	74	125	25	67	113	23
Miscellaneous	-33	0	0	-30	0	0
Deliveries for domestic use	12,051	12,355	12,477	10,932	11,208	11,319
Transfer to sugar-containing products for exports under re-export program	148	120	120	134	109	109
Transfer to polyhydric alcohol, feed, other alcohol	22	35	35	20	32	32
Commodity Credit Corporation (CCC) sale for ethanol, other	0	0	0	0	0	0
Deliveries for domestic food and beverage use	11,881	12,200	12,322	10,778	11,068	11,178
Total Use	12,091	12,480	12,502	10,969	11,322	11,342
Ending stocks	2,053	1,477	1,534	1,863	1,340	1,391
Private	2,053	1,477	1,534	1,863	1,340	1,391
Commodity Credit Corporation (CCC)	0	0	0	0	0	1
Stocks-to-use ratio	16.98	11.84	12.27	16.99	11.84	12.27

Source: U.S. Dept. of Agriculture, Economic Research Service, Sugar and Sweetener Outlook.

U.S. sugar production is estimated to be 8.774 million STRV in 2016/17, a 67,000-STRV decrease from the April figure. Estimated cane sugar production is lowered 3,000 STRV from the previous month to 3.842 million STRV. The reduction is due to updated production figures in Texas through March as reported in the Farm Service Agency's (FSA) *Sweetener Market Data* (SMD). Texas is estimated to produce 135,000 STRV. Estimated production in Florida, Louisiana, and Hawaii remains unchanged from the previous month at 2.051 million, 1.612 million, and 43,000 STRV, respectively.

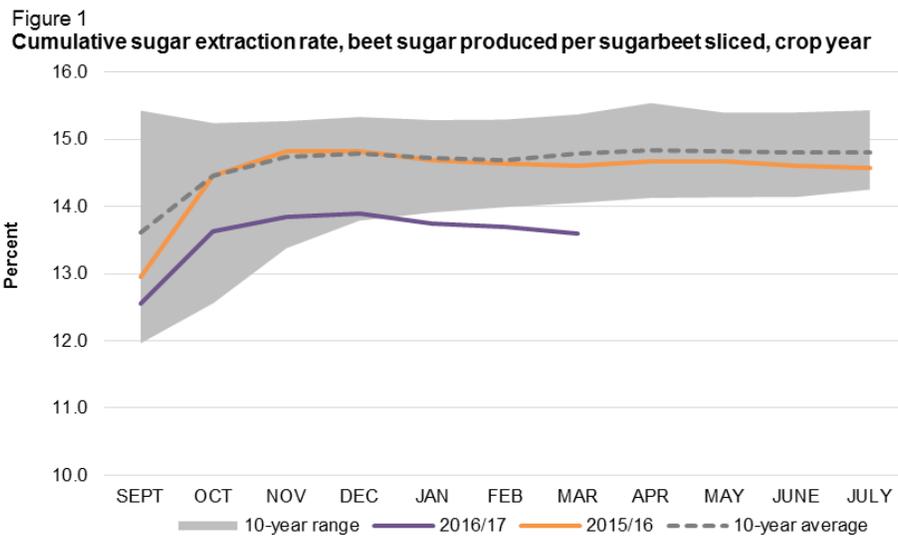
Beet sugar production in 2016/17 is estimated to be 4.932 million STRV, a 64,000-STRV reduction from the April projection. The reduction is primarily due to a reduced sucrose extraction rate from sliced beets. Reported processor data through March shows a cumulative rate of 13.6 percent, which remains well below rates seen in recent years.

Table 2: Beet sugar production projection calculation, 2016/17

	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2016/17
								April	May
Sugarbeet production (1,000 short tons) 1/	29,783	32,034	28,896	35,224	32,789	31,285	35,371	36,881	36,881
Sugarbeet shrink 2/	5.7%	5.9%	5.9%	4.8%	6.8%	5.4%	6.5%	7.0%	7.0%
Sugarbeet sliced (1,000 short tons)	28,097	30,137	27,184	33,532	30,545	29,595	33,066	34,314	34,314
Sugar extraction rate from slice	14.3%	15.4%	15.0%	15.3%	14.3%	14.6%	14.6%	13.8%	13.6%
Sugar from beets slice (1,000 STRV)	4,023	4,631	4,086	5,142	4,325	4,325	4,820	4,727	4,667
Sugar from molasses (1,000 STRV) 2/	325	357	401	327	324	341	362	353	353
Crop year sugar production (1,000 STRV) 3/	4,348	4,987	4,487	5,469	4,648	4,667	5,183	5,080	5,020
August-September sugar production (1,000 STRV)	396	623	294	708	315	461	688	606	606
August-September sugar production forecast (1,000 STRV) 4/	--	--	--	--	--	--	606	483	483
Sugar from imported beets (1,000 STRV) 5/	--	--	--	--	--	--	--	40	36
Fiscal year sugar production (1,000 STRV)	4,575	4,659	4,900	5,076	4,794	4,893	5,119	4,996	4,932

Notes: 1/ National Agricultural Statistics Service, U.S. Dept. of Agriculture. 2/Projections based on processor forecasts published by U.S. Dept. of Agriculture, Farm Service Agency. 3/ August-July basis. 4/ 2016/17 based on 10-year historical average. 5/ Sugar from imported beets split out for projections only. They are incorporated into total production in historical data.

Source: U.S. Dept. of Agriculture, Economic Research Service and World Agricultural Outlook Board.



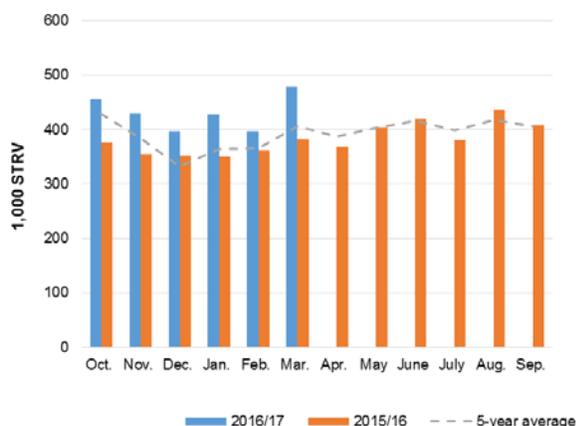
Source: U.S. Dept. of Agriculture, Economic Research Service and Farm Service Agency.

Imports in 2016/17 are estimated to be 3.130 million STRV, a 3,000-STRV increase from the previous month. Imports under free trade agreement (FTA) quota programs are estimated at 1.578 million STRV, accounting for the change. The increase is due to shipments from Costa Rica and Honduras—which have quotas on a calendar year basis within the terms of Dominican Republic–Central America Free Trade Agreement (CAFTA-DR)—coming in the April to June quarter, displacing potential shipments in the October to December quarter. As a result, these shipments increase imports for 2016/17, rather than being accounted for in the 2017/18 supply balance. Imports under other programs are estimated at 375,000 STRV, unchanged from the previous month. Imports from Mexico are also unchanged from the previous month at 1.162 million STRV.

Domestic deliveries increased for 2016/17 based on strong pace of deliveries from beet processors

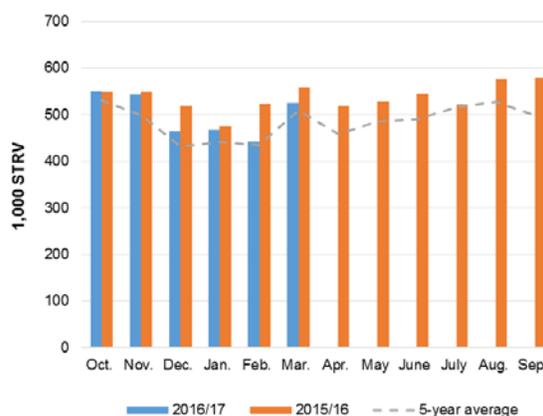
Domestic sugar deliveries for food and beverage use in 2016/17 are estimated at 12.200 million STRV, a 100,000-STRV increase from the April projection. The increase is based on the continued strong pace of total sugar deliveries reported through March, running 5.5 percent ahead of the previous year. In particular, deliveries by beet processors have remained 18.8 percent ahead of the previous year’s relatively lackluster levels. Deliveries for the month of March were a single-month record for beet processors, totaling 479,000 STRV. Deliveries by cane refiners are 5.6 percent behind the previous year, offsetting some of the gains in beet deliveries. Monthly shipments of cane sugar remain in line with historical averages, however.

Figure 2
Beet sugar deliveries, monthly, 2010/11 to 2016/17



Source: U.S. Department of Agriculture, Farm Service Agency.

Figure 3
Cane sugar deliveries, monthly, 2010/11 to 2016/17



Source: U.S. Department of Agriculture, Farm Service Agency.

Other domestic sugar delivery estimates for 2016/17 remain unchanged at 155,000 STRV, as do estimated exports at 125,000 STRV. Total sugar use is estimated to total 12.480 million STRV, reflecting the increase in food and beverage use.

U.S. ending stocks are projected to be 1.478 million STRV, a 165,000-STRV decrease from the previous month’s projection, due to raised estimates for deliveries and a reduced outlook for production. The stocks-to-use ratio is estimated to be 11.8 percent, compared with the previous month’s projection of 13.3 percent.

Projected U.S. production for 2017/18 lower due to less cane sugar production

Projected supplies for 2017/18 are 14.036 million STRV, a 0.6-percent increase from the previous year’s estimate. U.S. production is projected to be 8.700 million STRV, which would represent a 0.8-percent decline relative to 2016/17.

Beet sugar production is projected to be 4.950 million STRV, a 0.4-percent increase from the previous year. According to the National Agricultural Statistics Service’s (NASS) *Prospective Plantings* report, planted acres of sugarbeets are expected to be 2.5 percent lower, or 29,000 acres fewer, than the previous year’s crop. At the State level, all sugarbeet-producing States either kept their planted area unchanged or lower, with the sharpest declines in total area coming from Michigan, Minnesota, and North Dakota.

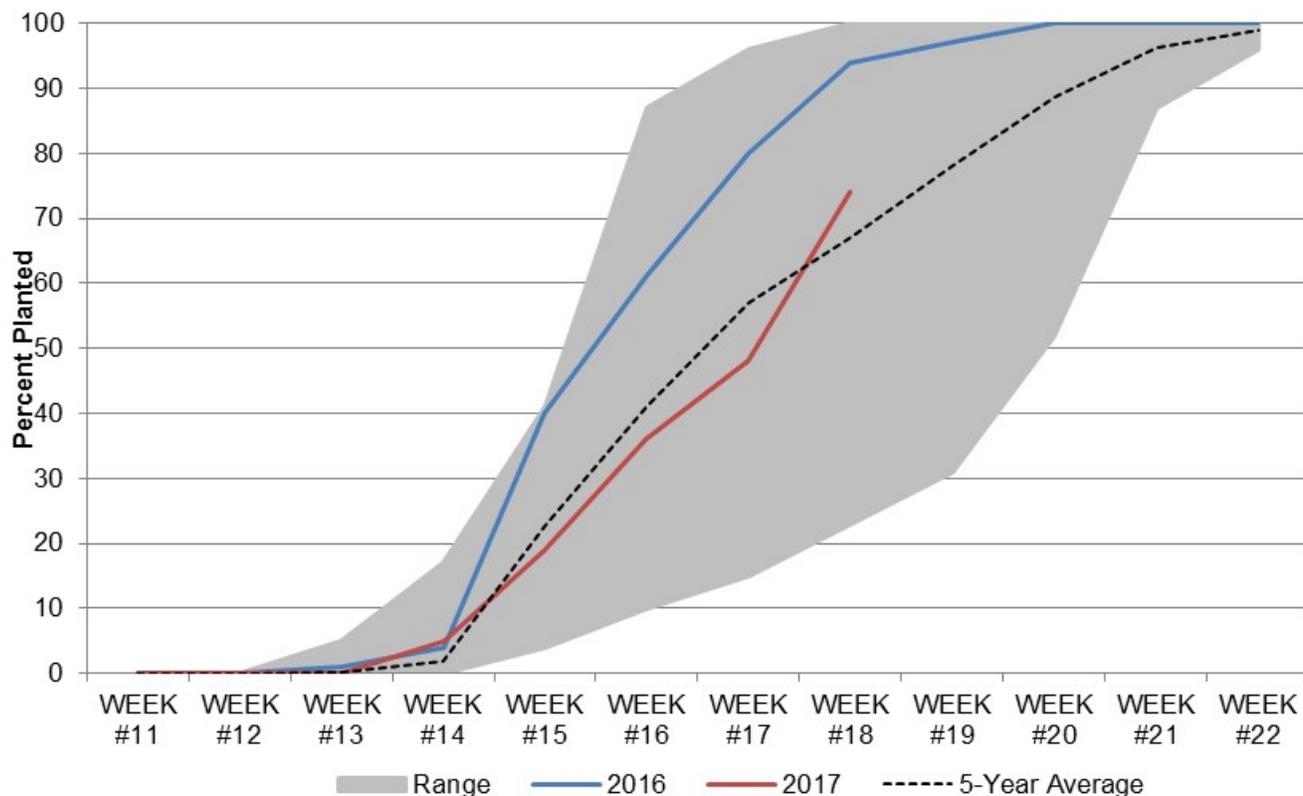
Table 3: Sugarbeet planted area, 2015/16 to 2017/18

State	2015/16	2016/17	2017/18	Annual Change
		<i>1,000 acres</i>		<i>percent</i>
Minnesota	443.0	437.0	430.0	-1.6
North Dakota	208.0	213.0	206.0	-3.3
Idaho	174.0	172.0	167.0	-2.9
Michigan	152.0	151.0	143.0	-5.3
Nebraska	47.5	48.0	48.0	0.0
Montana	44.0	45.6	45.0	-1.3
Wyoming	31.3	30.7	30.5	-0.7
Colorado	27.5	28.1	28.0	-0.4
California	24.7	25.3	25.3	0.0
Oregon	7.8	10.7	10.0	-6.5
Washington	N/A	2.0	2.0	0.0
U.S. Total	1,159.8	1,163.4	1,134.8	-2.5

Source: U.S. Dept. of Agriculture, National Agricultural Statistics Service.

Through May 7, 2017, 74 percent of the U.S. sugarbeet crop had been planted. The pace had picked up in the first week of May, particularly in the largest producing States of Minnesota and North Dakota. The current pace is now above the 5-year average, but lags behind the pace in 2015 and 2016. Historically, early plantings are correlated with higher yields and an increased share of beet sugar production in August and September, before the beginning of the October 1 fiscal year. Progress during the remainder of the planting season, as well as crop conditions through July, will be important factors in forming yield expectations for the current crop. For the 2017/18 beet sugar production projection, sugarbeet yield, recovery rates, and early-season production are currently in line with recent historical trends, resulting in a small year-over-year increase despite the reduced planted area.

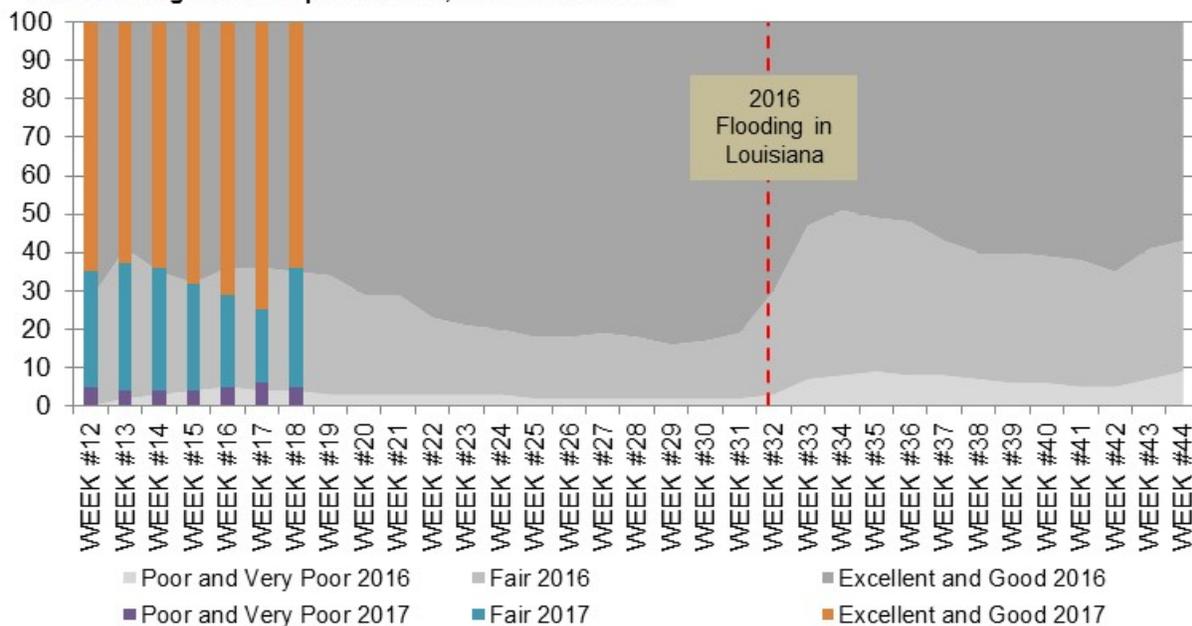
Figure 4
U.S. sugarbeet planting progress, United States 2000 to 2017



Source: U.S. Dept. of Agricultura, National Agricultural Statistics Service.

Cane sugar production in 2017/18 is projected to be 3.750 million STRV, which would represent a 2.4-percent decline from the current 2016/17 estimate. Projected production in Florida (2.000 million STRV) and Louisiana (1.600 million STRV) represents yield and recovery rates in line with recent historical averages and slightly higher harvested area in line with increases in 2016/17. The projections reflect a 2.5-percent decrease in Florida production and a 0.8-percent decrease in Louisiana relative to current estimates for 2016/17. There will be no official harvested-area estimate until the June 30 *Acreage* report released by NASS. Weekly crop reports from NASS show that the condition of the Louisianan cane crop is comparable with last year's. Texas is projected to produce 150,000 STRV, which would be a 9.7-percent increase from the previous year as the region continues to recover and improve upon the poor production in 2014/15 and 2015/16 that was due to a series of weather-related events. Production in Hawaii is not projected in 2017/18, as the State's last remaining cane processor ceased operating in December 2016. The lack of production in Hawaii accounts for 43,000 STRV of 2016/17 production that will not be factored into 2017/18 totals.

Figure 5
Louisiana sugarcane crop conditions, 2016/17 to 2017/18



Source: U.S. Dept. of Agriculture, National Agricultural Statistics Service.

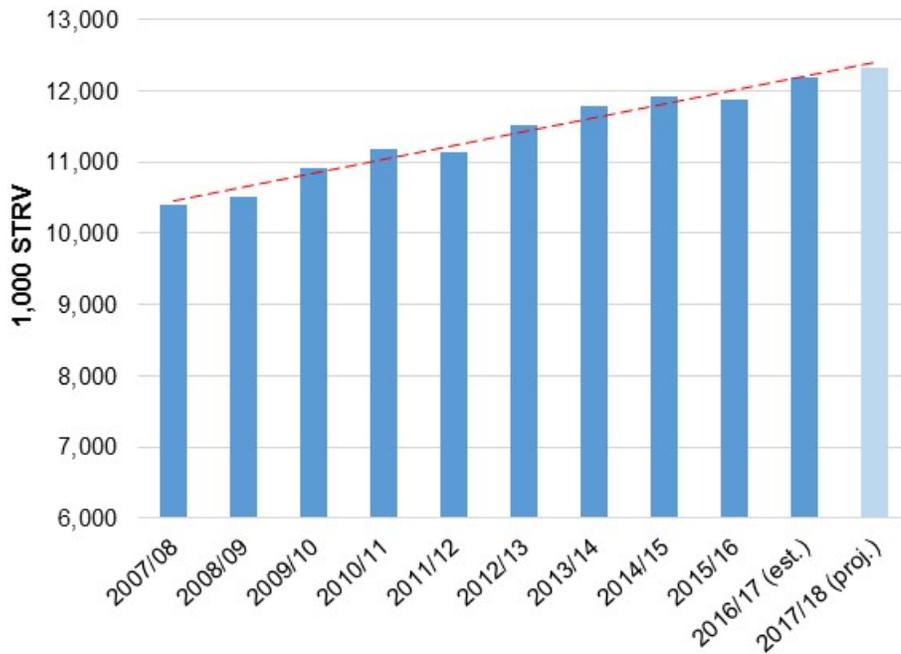
U.S. sugar imports in 2017/18 are projected to be 3.858 million STRV. Imports under quota programs are projected to total 1.373 million STRV. The projection only takes into account WTO minimums for the raw, refined, and specialty sugar TRQs, as well as projected trade under FTAs. The raw TRQ also incorporates a projected 99,000-STRV shortfall, which is in line with the current shortfall for the 2016/17 TRQ. Overall, this would be 15.0 percent less than the current 2016/17 estimates. There have been no announcements regarding additional quotas such as for specialty sugar, and so projections only reflect the current commitments established under minimum WTO commitments and FTAs.

Imports under other programs are projected to be 175,000 STRV, which is a 200,000-STRV decline from the current 2016/17 estimate. This is primarily due to fewer imports expected under the re-export program in 2017/18. License balances for the program are expected to be more constrained in 2017/18 due to the high import activity estimated for 2016/17 and projections for lower exports and re-export deliveries for 2017/18.

Imports from Mexico are projected to total 2.301 million STRV in 2017/18, 49.5 percent larger than imports in 2016/17. The projection is based on the calculation of U.S. Needs, as defined in the countervailing duties (CVD) suspension agreement signed by the U.S. Department of Commerce (USDOC) and the Government of Mexico in December 2014. The projection also takes into account, however, that current imports under quota only reflect WTO minimum amounts and assumes that Mexican exporters will expect additional U.S. import quotas in line with the previous year that will lower the U.S. Needs calculation.

Domestic deliveries for 2017/18 are projected to be 12.477 million STRV, including a projected 12.322 million STRV for food and beverage use. Deliveries for food and beverage use represent a 1.0-percent increase from the current 2016/17 estimate. The increase is in line with the longer term trend in delivery growth. While the 2016/17 estimate implies stronger annual growth, it is compared against 2015/16, which had a year-over-year decline.

Figure 6
**U.S. sugar deliveries for food and beverage use, fiscal year,
 2007/08 to 2017/18**



Source: U.S. Department of Agriculture, Economic Research Service.

Other domestic deliveries for 2017/18 are projected to be 155,000 STRV, unchanged from the current estimates for 2016/17. The categories within other deliveries remain unchanged as well, including: deliveries for re-export products (120,000 STRV) and livestock feed and polyhydric alcohol (35,000 STRV). Exports are projected to be 25,000 STRV, which is 100,000-STRV less than the current 2016/17 estimate.

Ending stocks for 2017/18 are projected to be 1.534 million STRV. That would increase ending inventories by 3.7 percent compared with current projections for 2016/17. The ending stocks-to-use ratio would be 12.3 percent.

Mexico exports for 2016/17 lowered due to larger export prospects to the United States for 2017/18

Sugar supplies in Mexico for 2016/17 are estimated to be 7.298 million metric tons, actual value (MT), unchanged from the previous month. Production is estimated to be 6.186 million MT, and imports are projected to be 75,000 MT, both also unchanged.

Table 4 -- Mexico sugar supply and use, 2015/16 - 2016/17 and projected 2016/17, May 2017.

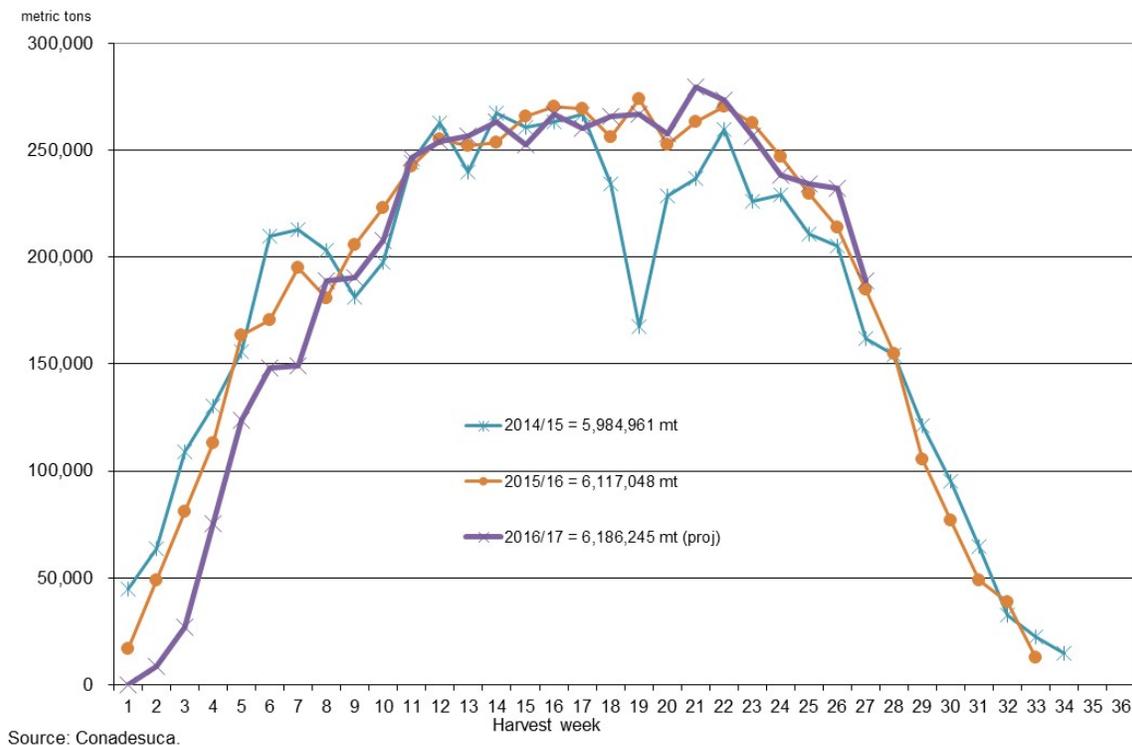
Items	2015/16	2016/17 (estimate)	2017/18 (forecast)
	1,000 metric tons, actual weight		
Beginning stocks	811	1,037	1,342
Production	6,117	6,186	6,225
Imports	83	75	75
Imports for consumption	17	25	25
Imports for sugar-containing product exports, IMMEX 1/	66	50	50
Total supply	7,011	7,298	7,642
Disappearance			
Human consumption	4,387	4,461	4,528
For sugar-containing product exports (IMMEX)	390	390	390
Other deliveries and end-of-year statistical adjustment	-10	0	0
Total	4,767	4,851	4,918
Exports	1,207	1,105	1,994
Exports to the United States & Puerto Rico	1,120	995	1,969
Exports to other countries	86	110	25
Total use	5,974	5,956	6,912
Ending stocks	1,037	1,342	731
	1,000 metric tons, raw value		
Beginning stocks	859	1,099	1,423
Production	6,484	6,557	6,599
Imports	88	80	80
Imports for consumption	18	27	27
Imports for sugar-containing product exports (IMMEX)	70	53	53
Total supply	7,431	7,736	8,101
Disappearance			
Human consumption	4,650	4,729	4,799
For sugar-containing product exports (IMMEX)	413	413	413
Other deliveries and end-of-year statistical adjustment	-10	0	0
Total	5,053	5,143	5,213
Exports	1,279	1,171	2,114
Exports to the United States & Puerto Rico	1,187	1,054	2,087
Exports to other countries	92	117	27
Total use	6,332	6,313	7,326
Ending stocks	1,099	1,423	775
Stocks-to-human consumption (percent)	23.6	30.1	16.1
Stocks-to-use (percent)	17.4	22.5	10.6
High fructose corn syrup (HFCS) consumption (dry weight)	1,482	1,484	1,484

1/ IMMEX = Industria Manufacturera, Maquiladora y de Servicios de Exportación.

Source: USDA, *World Agricultural Supply and Demand Estimates* and Economic Research Service, Sugar and Sweeteners Outlook; Conadesuca.

Through May 7, Mexico has produced 5.414 million MT in the current campaign, which is 70,000 MT less than the same period last year and 131,000 MT less than the pace of the latest estimate from Conadesuca. The current year got off to a slow start, however, creating the possibility of a surge later in the year. However, weather and next year's production constraints could limit the ability of the industry to extend the harvest too late into the season; this may be indicated in the latest weekly report, which was not incorporated into the May WASDE due to the timing of its release. Several sugarcane mills in Mexico have concluded their harvest season, predominantly finishing on schedule, but the majority of mills are expected to remain open through May and a few are expecting to continue processing through June.

Figure 7
Mexico sugar production, by week of harvest, 2014/15-2016/17



Domestic deliveries are estimated to be 4.851 million MT, raised 10,000 MT from the April projection. Domestic deliveries for human consumption are unchanged at 4.461 million MT. Deliveries for the IMMEX program are raised 10,000 MT to 390,000 MT, but are partially offset by a 50,000-MT decline in miscellaneous deliveries. This is based on IMMEX results from Conadesuca for 2015/16, showing non-U.S. imports being utilized for the program. These imports are expected to continue in 2016/17. The IMMEX program has primarily drawn its supplies from domestic processors after changes in Mexican regulations implemented in February 2016. U.S. sugar exports benefiting from the U.S. re-export program are no longer eligible to gain tax-advantaged status as a result of the change in regulations.

Mexico sugar exports in 2016/17 are estimated at 1.105 million MT, a 59,000-MT decrease from the previous month's projection. Exports to the United States remain unchanged from the previous month at 995,000 MT, based primarily on the published Export Limit from the USDOC subsequent to the March 2017 WASDE. Exports to other countries were reduced by 59,000 MT to 110,000 MT based on pace-to-date. Mexico exporters are expected to hold more sugar in inventories for 2016/17 in order to meet the expected increased access to the U.S. market for 2017/18. As a result, exports to lower returning third countries are expected to be lower than forecast last month.

Ending stocks for 2016/17 are estimated to be 1.342 million MT, a 49,000-MT increase from the April projection. As mentioned, the increase is due to the outlook for shipments to the United States for 2017/18, which would have better returns than exporting to other markets. The stocks-to-consumption ratio is estimated at 30.1 percent.

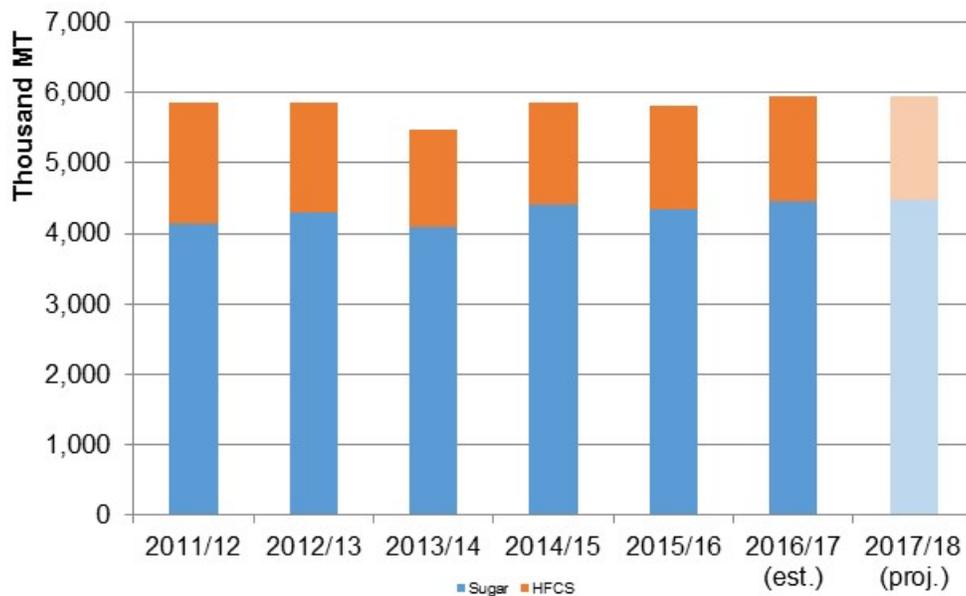
Projected ending stocks for 2017/18 relatively low due to increased export demand

For 2017/18, Mexico is projected to have 7.642 million MT of total sugar supplies, which would be 4.7 percent higher than the current estimate for the 2016/17. Beginning stocks carried over from 2016/17 would account for much of the increase, totaling 305,000 MT more sugar than carried over than in the previous year. Sugar production in Mexico is projected to total 6.225 million MT, which would represent a 0.6-percent increase from the current

2016/17 estimate and would reflect an increase in sugarcane produced and a recovery rate in line with recent historical averages.

Deliveries for domestic consumption are projected to total 4.528 million MT, a 1.5-percent increase from the 2016/17 estimate. The projection is based on: the total of HFCS and sugar per capita deliveries of 47.73 kg per person from 2016/17 carrying over into the following year; total HFCS deliveries remaining unchanged from the previous year at 1.484 million MT; and sugar deliveries accounting for the remaining sweetener consumption and population growth. Deliveries for the IMMEX program are projected to be 390,000 MT, unchanged from 2016/17, resulting in total domestic deliveries projected at 4.918 million MT.

Figure 8
Mexican sweetener consumption October to September, fiscal year



Source: Conadesuca; U.S. Dept. of Agriculture, World Agricultural Outlook Board.

Mexico sugar exports are projected to total 1.994 million MT, an 80.5-percent increase compared with the previous year. Exports to the United States, based on the expected U.S. Needs calculation defined in the suspension agreements signed December 2014, are projected to be 1.969 million MT. That would be nearly double the current estimate for 2016/17. Exports to other countries are projected to be 25,000 MT.

Overall, total use is projected to be 16.0 percent larger than 2016/17, largely driven by the outlook for increased exports to the United States.

Ending stocks for 2017/18 are projected to be 731,000 MT, which would result in a stocks-to-consumption ratio of 16.1 percent. Both of these would be low relative to current market levels, suggesting a potentially tight market in Mexico for 2017/18.

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Sugar and Sweeteners Outlook <http://www.ers.usda.gov/Publications/SSS/WASDE> <http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documented=1194>
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