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*Electronic Outlook Report from USDA's  
Economic Research Service and Foreign Agricultural Service*

## Outlook for U.S. Agricultural Trade

### FY 2013 Exports Forecast at a Record \$142 Billion; Imports at a Record \$112.5 Billion

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The next release is  
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Approved by the  
World Agricultural  
Outlook Board.

Fiscal 2013 agricultural exports are forecast at a record \$142 billion, down \$3.0 billion from the November forecast, but \$6.2 billion above final fiscal 2012 exports. Grain and feed exports are forecast down \$4.3 billion mostly on reduced corn prospects. Oilseed exports are up \$1.0 billion due to strong soybean meal and oil shipments. Cotton exports are forecast up \$400 million, primarily due to greater import demand from China. The forecast for livestock, poultry, and dairy is up \$300 million with greater beef and poultry exports outweighing lower pork shipments. Horticultural exports are unchanged at a record \$32 billion. Sugar and tropical products are forecast down \$300 million on lower expected exports to Canada and Mexico.

U.S. agricultural imports are forecast at a record \$112.5 billion, \$2.5 billion lower than the November forecast, but \$9.1 billion higher than in fiscal 2012. The reduced forecast is largely due to lower expected imports of sweeteners, coffee, and rubber.

The forecast trade balance in fiscal 2013 is lowered \$500 million to \$29.5 billion. This is down \$2.9 billion from fiscal 2012.

Table 1--U.S. agricultural trade, fiscal years 2007-13, year ending September 30

Item	2007	2008	2009	2010	2011	2012	Forecast fiscal year	
							2013	
							Nov.	Feb.
<i>Billion dollars</i>								
Exports	82.2	114.9	96.3	108.6	137.4	135.8	145.0	142.0
Imports	70.1	79.3	73.4	79.0	94.5	103.4	115.0	112.5
Balance	12.2	35.6	22.9	29.6	42.9	32.4	30.0	29.5

Reflects forecasts in the February 8, 2013, *World Agricultural Supply and Demand Estimates* report.

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

### *World Growth Rebounds in 2013*

The world economy grew by 2.4 percent in 2012, below the 2.9 percent rate of 2011. Trade growth in 2012 dropped to 2 percent from a robust 7 percent in 2011. Asian GDP growth slowed as European imports shrank. Higher Western Hemisphere growth offset the European recession's impact on developing economies' exports and growth, preventing a worldwide recession. World trade growth is expected to accelerate to between 4 and 5 percent in 2013, as world output growth rises to 2.7 percent. Europe's recession and Japan's growth slowdown will be the major factors preventing more rapid world growth in 2013. Expected higher growth in the U.S., Asian, and Latin American economies will drive the expected higher growth in 2013. The dollar which appreciated 1/2 percent for 2012 from a very low level, will likely depreciate between 1 and 2 percent in 2013. The weaker dollar and higher growth in developing Asia and Latin America will boost U.S. exports, despite a lack of European customers. Expansion of U.S. investment will boost U.S. imports and the depreciating dollar will make exports cheaper. So, trade growth will help boost U.S. and world output growth in 2013.

Worldwide, monetary authorities have continued boosting credit availability. In China, half of the measured credit expansion in the last quarter of 2012 was to finance trade. In the developing world, prior tight credit, currency appreciation, a continuing recession in the Eurozone, and anemic Japanese growth will dampen growth in 2013, although it will be higher than in 2012. China is expected to see faster export growth, but rising wages, spot labor shortages and reluctance by both households and businesses to increase borrowing may curtail the domestic growth impact of recently eased credit policies. Brazil and Argentina, due to strong export growth, higher investment and high commodity prices are expected to grow faster in 2013. The main, but low probability, risk to world growth in 2013 is a possible currency war as nations are tempted to boost exports at the expense of trade partners. Financial markets and most analysts consider a significant spillover of the Eurozone financial problems to North American and Asian financial institutions unlikely in 2013.

The modest dollar depreciation expected in 2013 will be favorable to U.S. farm and manufactured goods exports. Further, continued inexpensive credit for financing trade and higher developing economies' growth will boost U.S. and world exports. Total world trade is expected to be up 4 to 5 percent in 2013. Higher expected world growth, especially in developing economies, lower U.S. energy prices, and more available credit make the outlook for U.S. agricultural trade promising in 2013. Because of high U.S. energy export transport costs, the new U.S. energy supplies from U.S. gas and oil fields will be available on domestic U.S. markets at a discount relative to world prices. Farmers will benefit from lower fuel and fertilizer costs in 2013, facilitating higher output and higher trade volumes. Overall, world macroeconomic factors will be very favorable for U.S. farm export volumes in 2013.

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

Region/country	Share of world GDP (2010)	GDP		Real exchange rate 2/		CPI	
		2012	2013	2012	2013	2012	2013
		Growth rate				Growth rate	
World	100.0	2.4	2.7	0.5	-1.2	3.7	2.4
NAFTA	30.3	2.1	2.5	2.5	-1.4	2.2	2.0
Canada	2.4	2.0	2.1	1.5	2.5	1.6	1.9
United States	26.2	2.0	2.5	0.0	0.0	2.1	1.9
Mexico	1.6	3.9	3.8	4.0	-3.4	4.1	3.6
Latin American and Caribbean	7.2	2.2	3.3	-0.8	-1.8	7.3	7.4
Argentina	0.5	1.9	3.2	2.0	2.1	10.0	10.4
Brazil	2.4	1.0	3.8	10.7	9.3	4.6	4.4
Europe	30.1	-0.5	0.0	8.0	-1.0	2.6	2.0
Asia and Oceania	26.6	4.6	4.3	0.3	-1.5	2.9	2.8
China	7.5	7.7	8.4	-2.8	-2.6	2.6	2.7
Japan	8.8	1.8	0.5	-2.2	2.0	0.0	-0.3
South Korea	2.0	2.1	3.4	1.6	-4.6	2.2	2.5
Indonesia	0.8	6.1	6.1	4.8	-1.7	4.3	5.1
Vietnam	0.1	4.9	5.4	-2.3	8.5	6.2	5.0
India	2.3	5.4	6.1	6.0	7.5	9.2	8.1
Australia	1.6	3.5	2.4	0.1	0.7	1.7	2.0
New Zealand	0.2	1.7	2.5	-0.1	-1.5	1.2	1.8
Middle East	3.2	3.2	3.6	-1.5	-0.5	8.2	7.1
Turkey	0.8	2.6	4.1	0.4	-3.4	8.9	6.4
Africa	2.4	4.7	5.0	-1.6	-1.2	8.0	7.4

1/ Real values have a 2005 base year.

2/ Local currency per U.S. dollar. A negative growth rate indicates a depreciation of the dollar. (World is U.S.-trade-weighted estimate.)

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

## Export Products

The fiscal 2013 forecast for grain and feed exports is lowered \$4.3 billion from November to \$32.8 billion with wheat and corn down sharply, accounting for most of the decline. The feeds and fodders forecast is up slightly, as higher unit values offset weak shipments of corn gluten feed and meal. Expected fiscal 2013 corn exports plummeted by nearly \$3.0 billion to \$7.8 billion. Values are lowered, but are still at historic highs, underpinned by tight domestic supplies. Intense competition from Brazil, Argentina, and others resulted in a 7.0 million ton reduction in volume from the November forecast, despite greater global import demand. Sorghum value is down one-third to \$500 million because of tight exportable supplies.

Fiscal 2013 wheat exports are down \$1.4 billion from November to \$10.2 billion due to reduced shipments and lower unit values. Volume is down due to intensified competition from Northern Hemisphere exporters. Forecasted wheat export unit values are reduced with lower corn prices and slow export sales. Rice exports are up 100,000 tons to 3.7 million from November, while value remains unchanged at \$2.1 billion. Larger shipments of low-priced long grain rough rice to Mexico and Central America are nearly offset by higher-priced medium grain rice exports to the Mediterranean region.

Fiscal 2013 oilseed and product exports are forecast at \$32.4 billion, up \$1.0 billion from the November forecast, propelled by a surge in soybean meal and oil exports. Strong product demand in the wake of diminished South American sales led to a doubling of the soybean oil export forecast to 1.0 million tons, while adding 800,000 tons to the meal forecast. Soybean and soybean meal prices, despite some softening, remain near record highs, while oil prices maintain their strength. Strong demand from China has helped maintain soybean export volume despite very tight supplies, though forecast value declined marginally from the November forecast. Export volumes are expected to slow in the coming months as Brazil's crop enters the market. However, port congestion in Brazil is likely to increase shipping costs and slow arrivals from the interior which could lend some support to prices and demand for U.S. soybeans and products.

Cotton is raised \$400 million to \$5.0 billion for fiscal 2013. Export volume is forecast higher than in November due primarily to greater import demand from China.

The fiscal 2013 export forecast for livestock, poultry, and dairy is raised \$300 million to a record \$30.1 billion, with gains in poultry and beef outweighing reductions in pork. Beef exports are raised \$200 million on higher unit values, while volumes are unchanged. Expansion in the Japanese market and strong demand in other major markets offsets restrictions by Russia. Poultry exports are forecast up \$200 million, bolstered by rising global demand and higher unit values. Cattle exports are forecast \$50 million higher this quarter, largely on stronger prices. Pork exports are lowered \$200 million mostly on lower unit values and smaller volumes although Russia's import ban is expected to result in redirected shipments to other markets. Dairy exports are unchanged at \$5.0 billion.

The fiscal 2013 export forecast for horticultural products is a record \$32.0 billion, unchanged from the November estimate. The fresh fruit and vegetable export

forecast remains at the \$7.6 billion forecast in November, with exports to Canada, Europe, and Japan expected to continue rising from fiscal 2012 levels. Processed fruit and vegetable exports are also unchanged from November at \$7.4 billion, and expected higher than in 2012 based on sustained growth in top markets. The whole and processed tree nut forecast remains at \$7.0 billion, on the strength of China's growing demand for almonds, pistachios, and walnuts. The sugar and tropical product category is forecast \$300 million lower than in November. The forecast was lowered to \$7.0 billion due primarily to lower-than-anticipated volumes to Canada and Mexico.

Table 3--U.S. agricultural exports: Value and volume, by commodity, 2012-13

Commodity	October-December		Fiscal year 2012	Forecast fiscal 2013	
	2012	2013		Nov.	Feb.
<b>VALUE</b>					
<i>— Billion dollars —</i>					
Grains and feeds 1/	8.565	6.903	33.404	37.1	32.8
Wheat 2/	1.787	1.584	8.353	11.6	10.2
Rice	0.524	0.615	1.988	2.1	2.1
Coarse grains 3/	3.561	1.703	11.736	11.6	8.4
Corn	3.428	1.511	11.240	10.7	7.8
Feeds and fodders	1.616	1.895	6.908	7.3	7.5
Oilseeds and products 4/	8.849	15.225	28.638	31.4	32.4
Soybeans	6.905	11.814	19.797	22.5	22.2
Soybean meal 5/	0.799	1.779	3.876	3.8	4.3
Soybean oil	0.141	0.470	0.830	0.7	1.3
Livestock, poultry, and dairy	7.616	7.739	29.800	29.8	30.1
Livestock products	4.823	4.896	18.474	18.7	18.8
Beef and veal 6/	1.195	1.232	4.770	4.8	5.0
Pork 6/	1.518	1.421	5.552	5.6	5.4
Beef and pork variety meats 6/	0.386	0.402	1.406	1.4	1.4
Hides, skins, and furs	0.590	0.604	2.764	2.8	2.8
Poultry and products	1.539	1.639	6.157	6.1	6.3
Broiler meat 6/ 7/	1.025	1.095	4.112	4.1	4.2
Dairy products	1.255	1.204	5.170	5.0	5.0
Tobacco, unmanufactured	0.361	0.408	1.052	1.1	1.1
Cotton	1.269	0.962	6.553	4.6	5.0
Seeds	0.430	0.483	1.468	1.5	1.5
Horticultural products 8/	7.789	8.642	28.644	32.0	32.0
Fruits and vegetables, fresh	1.759	1.854	6.996	7.6	7.6
Fruits and vegetables, processed 8/	1.686	1.787	6.840	7.4	7.4
Tree nuts, whole and processed	2.228	2.626	6.106	7.0	7.0
Sugar and tropical products 9/	1.533	1.607	6.198	7.3	7.0
Major bulk products 10/	14.407	17.086	49.479	53.5	49.0
Total	36.414	41.982	135.775	145.0	142.0
<b>VOLUME</b>					
<i>— Million metric tons —</i>					
Wheat 2/	5.574	4.381	26.903	31.6	28.9
Rice	0.874	1.088	3.603	3.6	3.7
Coarse grains 3/	12.100	5.277	40.103	33.7	25.9
Corn	11.636	4.627	38.370	31.0	24.0
Feeds and fodders	4.193	4.247	17.540	17.2	16.6
Soybeans	14.322	19.395	38.397	36.6	36.6
Soybean meal 5/	2.171	3.128	8.837	7.2	8.0
Soybean oil	0.111	0.402	0.664	0.5	1.0
Beef and veal 6/	0.226	0.205	0.834	0.8	0.8
Pork 6/	0.497	0.472	1.837	1.8	1.8
Beef and pork variety meats 6/	0.220	0.201	0.754	0.7	0.7
Broiler meat 6/ 7/	0.852	0.856	3.299	3.2	3.3
Tobacco, unmanufactured	0.063	0.056	0.167	0.2	0.2
Cotton	0.463	0.506	2.716	2.5	2.7
Major bulk products 10/	33.397	30.703	111.889	108.2	98.0

Total may not add due to rounding.

1/ Includes corn gluten feed and meal and processed grain products. 2/ Excludes wheat flour. 3/ Includes corn, barley, sorghum, oats, and rye. 4/ Excludes corn gluten feed and meal. 5/ Includes soy flours made from protein meals. 6/ Includes chilled, frozen, and processed meats. 7/ Includes only federally inspected product. 8/ Includes juices. 9/ Includes coffee and cocoa products, tea, and spices. 10/ Includes wheat, rice, coarse grains, soybeans, cotton, and unmanufactured tobacco.

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

## Regional Exports

Agricultural exports in fiscal 2013 are forecast at \$142 billion, which is \$3.0 billion below the November forecast but remains a record. Increases in China and Columbia from the November forecast are more than offset by lower forecasts for Japan, South Korea, Hong Kong, Malaysia, Mexico, Caribbean, Peru, Egypt, and Nigeria.

### *Asia*

Exports to China are forecast up \$800 million to \$22 billion. As expected, exports of cotton and corn are down, compared with the first quarter last year, but soybean shipments have been very strong. Both unit values and the volume of soybean shipments from the United States are up, while shipments from Argentina and Brazil are down. Tree nut and poultry exports are also up for the first quarter and expected to register strong growth throughout the year. The forecasts for Hong Kong and Malaysia are lowered \$300 million and \$200 million respectively, but both remain above last year's record totals.

Japan is forecast \$1 billion lower than in November, at \$13.5 billion. This would be a decrease of nearly \$300 million from fiscal 2012. Corn exports are down for the first quarter as reduced U.S. shipments were replaced by Brazilian supplies, which is likely to continue. Reduced U.S. corn exports are also behind a \$500 million decrease in the forecast to South Korea. Total U.S. agricultural exports to South Korea are down 10 percent for the first quarter compared to the same period last year. A dramatic fall in corn shipments is only partially offset by increased soybean, pork, and horticultural exports. Strong Brazilian corn exports to South Korea are expected throughout the rest of the year and should largely replace U.S. supplies.

### *Western Hemisphere*

The forecast for Mexico is lowered \$500 million to \$18.5 billion. Though soybeans are off to a strong start, reduced corn prospects should lead to lower overall exports. Peru is forecast \$200 million lower than in November, at \$500 million. Overall Peruvian agricultural imports from all suppliers are up for the first quarter, but regional suppliers such as Argentina, Brazil, and Bolivia are the main beneficiaries. Shipments of U.S. wheat and cotton to Peru are expected to decline this year. The forecast for Colombia is raised \$300 million to \$1.1 billion. Shipments of rice, wheat, corn, and distillers dried grain are far surpassing last year's pace. Although Argentina remains the top agricultural product supplier to Colombia, demand for U.S. products is increasing. The forecast for the Dominican Republic is lowered \$200 million mostly due to lower corn export prospects.

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

North Africa is forecast \$800 million lower than in November, with the largest decrease in Egypt, which is forecast down \$600 million lower. Though total exports increased in the first quarter, mostly due to oilseed shipments, the forecast is lowered due to reduced grain export prospects. Nevertheless, the forecast for the year is still above last year by \$200 million. Nigeria is forecast down \$200 million and is now even with fiscal 2012. The Middle East is forecast down \$300 million, two thirds of which takes place in Turkey.

Table 4--U.S. agricultural exports: Value by region, 2012-13

Country and region 1/	October-December		Fiscal year	Share of	Forecast fiscal year	
	2012	2013	2012	2012 total	Nov.	Feb.
	<i>— Billion dollars—</i>			<i>Percent</i>		
Asia	5.724	6.019	60.382	44.5	61.6	60.5
East Asia	4.882	4.967	49.825	36.7	50.0	49.1
Japan	1.234	1.027	13.770	10.1	14.5	13.5
China	2.265	2.738	23.359	17.2	21.2	22.0
Hong Kong	0.326	0.362	3.381	2.5	4.0	3.7
Taiwan	0.341	0.302	3.093	2.3	3.6	3.6
South Korea	0.714	0.533	6.203	4.6	6.8	6.3
Southeast Asia	0.707	0.836	9.153	6.7	9.8	9.6
Indonesia	0.165	0.168	2.470	1.8	2.5	2.5
Philippines	0.167	0.176	2.304	1.7	2.4	2.4
Malaysia	0.077	0.096	0.876	0.6	1.2	1.0
Thailand	0.105	0.133	1.304	1.0	0.9	0.9
Vietnam	0.134	0.196	1.500	1.1	1.6	1.6
South Asia	0.135	0.217	1.404	1.0	1.8	1.8
India	0.068	0.152	0.764	0.6	0.8	0.8
Western Hemisphere	3.973	4.305	50.770	37.4	53.6	53.0
North America	3.081	3.043	38.898	28.6	40.0	39.5
Canada	1.570	1.672	20.008	14.7	21.0	21.0
Mexico	1.511	1.371	18.890	13.9	19.0	18.5
Caribbean	0.244	0.352	3.426	2.5	3.9	3.7
Dominican Republic	0.080	0.148	1.044	0.8	1.3	1.1
Central America	0.332	0.323	3.557	2.6	4.3	4.3
South America	0.317	0.587	4.889	3.6	5.4	5.5
Brazil	0.036	0.047	0.509	0.4	0.7	0.7
Colombia	0.045	0.174	0.843	0.6	0.8	1.1
Peru	0.048	0.046	0.581	0.4	0.7	0.5
Venezuela	0.087	0.132	1.527	1.1	1.7	1.7
Europe/Eurasia	0.923	1.382	11.293	8.3	12.7	12.7
European Union-27 2/	0.719	1.142	8.872	6.5	10.2	10.2
Other Europe 3/	0.054	0.067	0.470	0.3	0.4	0.4
FSU-12 4/	0.149	0.173	1.952	1.4	2.1	2.1
Russia	0.119	0.113	1.504	1.1	1.8	1.8
Middle East	0.581	0.744	5.804	4.3	7.9	7.6
Turkey	0.222	0.313	1.882	1.4	2.5	2.3
Saudi Arabia	0.085	0.141	1.135	0.8	1.1	1.1
Africa	0.390	0.422	5.681	4.2	7.8	6.8
North Africa	0.161	0.198	2.977	2.2	4.5	3.7
Egypt	0.057	0.111	1.785	1.3	2.6	2.0
Sub-Saharan Africa	0.229	0.225	2.704	2.0	3.3	3.1
Nigeria	0.090	0.089	1.076	0.8	1.3	1.1
Oceania	0.147	0.167	1.722	1.3	1.5	1.5
Trans-shipments via Canada 5/	0.039	0.000	0.122	0.1	0.1	0.1
<b>Total</b>	<b>11.776</b>	<b>13.040</b>	<b>135.830</b>	<b>100.0</b>	<b>145.0</b>	<b>142.0</b>

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.

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 U.S. Census Bureau, U.S. Department of Commerce.

## Import Products

A sluggish domestic economy may restrain U.S. consumer spending in 2013, but demand for food imports is not expected to stray far from last year's pace. U.S. imports of agricultural products are projected to rise by around 9 percent to \$112.5 billion in fiscal 2013, only slightly slower than the increase in fiscal 2012. However, the forecast is down \$2.5 billion from November's \$115 billion level. This downward adjustment is largely attributed to lower commodity prices for imported tropical products, including vegetable oils. Prices for sugar, rubber, cocoa and coffee beans, coconut oil, and palm oil have fallen sharply in 2012 as world demand, particularly from Europe, has weakened. The projected 8.8-percent growth in U.S. agricultural import value in fiscal 2013 is only half a percentage point lower than 2012's 9.4 percent increase.

Although U.S. personal spending did not grow in 2012 for food and beverages consumed at home, spending for food services was up by 3.7 percent. Consumer spending for food consumed at home versus food consumed away from home (at food services) were about equal in 2012 at 50 percent each. In 2011, total U.S. spending for food and beverages amounted to \$1.3 trillion, of which \$654 billion was purchased from food stores for home consumption. In 2012, \$85 billion, or roughly 82 percent, of U.S. agricultural imports consisted of food products, almost twice as much as the \$43 billion in 2004.

Lower prices for tropical products are projected to cut \$4 billion from the previous \$32.3 billion forecast for imported sugar and tropical products as a group in fiscal 2013. The new 2013 forecast of \$28.3 billion is equal to 2012's value. As prices for coffee, cocoa, rubber, and sugar have fallen significantly in 2012, import volumes in 2013 are expected to continue to increase. Total U.S. import volume for agricultural products rose 9 percent in fiscal 2012 (as measured in metric tons). Although import volume for sugar is expected lower in 2013, shipments of cocoa, coffee, and rubber are all expected to expand, offsetting part of the effect of their lower prices on corresponding import values. The large imports of food thickeners from India that occurred in fiscal 2012 are expected to continue.

The \$45.8 projected value for imported horticultural products in 2013 is \$1.4 billion higher than the last estimate. U.S. demand for fruits, fresh vegetables, and wine appears to be stronger than earlier expected, based on their first-quarter values. Import volumes for fresh and processed fruits and vegetables are slightly ahead of 2012's first quarter pace as their unit values have declined somewhat, especially for fresh fruits. The projected \$14 billion import value for fresh and processed fruits is 17 percent larger than 2012's \$12 billion total, and higher U.S. disposable personal income is anticipated to maintain elevated levels of demand for wine, tree nuts, nursery stock, and essential oils this year.

Due to the reduced crops in the wake of the U.S. drought, larger imports of corn and other coarse grains are expected in fiscal 2013. Their higher prices also contribute to the 22-percent projected rise in import values for bulk grains, processed grain products, and feeds to an aggregate \$11.6 billion, up from \$9.5 billion in 2012. Bulk grains account for a big share of this increase, and the balance is from grain products and animal feeds and fodder. Similarly, the import forecast for oilseeds and their products is roughly 30 percent higher in fiscal 2013, partly due to higher prices (about 9 percent more than in 2012). As a result, the \$9.7 billion import bill

expected in 2013 for oilseeds and products is 12 percent larger than in 2012. However, this forecast is \$300 million smaller than the last estimate because of lower prices for coconut and palm oils.

Projected beef imports are raised \$34 million as higher unit values offset slightly lower volumes. Due to expanded domestic pork production, pork imports are lowered \$43 million on smaller import volumes and unit values. Imported cattle are increased by \$106 million due to larger volume as domestic cattle supplies remain tight. Projected swine imports are reduced by 65,000 head as demand for Canadian hogs is expected to be weakened by greater U.S. pig production. The forecast for dairy imports is lowered due to reduced butter and cheese prices as domestic demand is anticipated to be weaker.

Table 5--U.S. agricultural imports: Value and volume, by commodity, 2012-13

Commodity	October-December		Fiscal year 2012	Forecast fiscal year 2013	
	2012	2013		Nov.	Feb.
	<b>VALUE</b> — Billion dollars —				
Livestock and dairy products	3.201	3.407	13.281	14.2	14.3
Livestock and meats	2.244	2.410	9.653	10.3	10.3
Cattle and calves	0.435	0.534	1.704	1.3	1.5
Swine	0.095	0.078	0.347	0.4	0.4
Beef and veal	0.725	0.775	3.623	4.1	4.1
Pork	0.355	0.342	1.334	1.3	1.3
Dairy products	0.812	0.842	3.013	3.2	3.1
Cheese	0.324	0.357	1.060	1.1	1.1
Grains and feed	2.481	2.921	9.515	11.6	11.6
Grain products	1.509	1.575	5.749	6.2	6.2
Oilseeds and products	2.268	2.117	8.654	10.0	9.7
Vegetable oils	1.564	1.266	5.759	6.1	5.6
Horticulture products	10.089	10.377	41.557	44.4	45.8
Fruits, fresh	1.705	1.761	7.618	8.0	8.4
Fruits, processed	1.033	1.188	4.358	4.5	5.7
Fruit juices	0.460	0.511	1.762	1.9	1.9
Nuts, whole and processed	0.516	0.470	1.801	2.0	2.0
Vegetables, fresh	1.395	1.430	5.831	6.2	6.0
Vegetables, processed	1.100	1.099	4.202	4.6	4.5
Wine	1.380	1.447	5.084	5.4	5.7
Malt beer	0.804	0.766	3.722	4.0	3.9
Essential oils	0.626	0.590	2.569	2.7	2.7
Cut flowers and nursery stock	0.386	0.383	1.624	1.7	1.7
Sugar and tropical products	7.098	5.708	28.318	32.3	28.3
Sweeteners & products	1.355	1.164	5.223	5.5	4.6
Confections	0.357	0.378	1.461	1.6	1.6
Cocoa and chocolate	1.064	0.992	4.117	4.5	4.5
Coffee beans and products	2.225	1.461	7.789	8.3	7.4
Rubber, natural	1.110	0.701	3.791	4.4	3.9
Other imports 1/	0.357	0.463	2.048	2.5	2.8
<b>Total agricultural imports</b>	<b>25.495</b>	<b>24.993</b>	<b>103.372</b>	<b>115.0</b>	<b>112.5</b>
<b>VOLUME</b> — Million metric tons —					
Wine 2/	0.322	0.331	1.202	1.4	1.3
Malt beer 2/	0.713	0.659	3.287	3.3	3.3
Fruit juices 2/	0.937	1.163	3.591	3.8	4.0
Cattle and calves 3/	0.665	0.638	2.331	1.9	2.0
Swine 3/	1.508	1.380	5.779	5.5	5.5
Beef and veal	0.152	0.152	0.744	0.8	0.8
Pork	0.093	0.090	0.354	0.4	0.3
Fruits, fresh	2.035	2.292	9.599	10.0	10.5
Fruits, processed	0.328	0.391	1.502	1.6	1.8
Vegetables, fresh	1.420	1.473	5.696	5.9	5.9
Vegetables, processed	0.823	0.828	3.202	3.4	3.4
Vegetable oils	1.062	0.905	3.976	4.3	4.0
Cocoa and chocolate	0.286	0.277	1.234	1.3	1.3
Coffee beans	0.385	0.337	1.539	1.6	1.6

Totals may not add due to rounding.

1/ Largely tobacco and planting seeds. 2/ Liquid volume is in billion liters. 3/ Million head.

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

## Regional Imports

Fifty-six percent of U.S. agricultural imports were purchased from developing countries in fiscal 2012. Among major trading partners, Mexico ranks second only to Canada as the top source of U.S. agricultural imports and is approaching Canada's level. This prospective convergence signals Mexico's emergence as the eventual single largest source of U.S. agricultural imports. Mexico's wide variety and selection of products, particularly tropical crops, is the driving force in the country's push to the top. U.S. demand for horticultural products—from avocados, strawberries, other berries, grapes, melons, mangos, citrus fruits, and pecans to tomatoes, peppers, cucumbers, squash, asparagus, and onions—are supplied in bulk quantities and lower prices year-round from Mexico. The geographic advantage of Mexico's planting areas conveniently matches Canada's proximity to U.S. markets.

Geographic distance and tropical crop production, especially horticultural commodities, similarly confer a comparative trade advantage to Central American farmers. Boosted by free trade agreements with the United States, Central American exports have exceeded Oceania's (Australia and New Zealand) exports to the United States over the past 2 years. Among the top suppliers in Central America are Guatemala, Costa Rica, and Honduras, whose major exports are bananas, pineapples, and melons, as well as coffee and sugar. Except for cocoa and vegetables, Central America rivals Mexico as a prime source for coffee and to a lesser extent, sugar. In fact, Central America as a group is the top supplier of U.S. coffee, followed by Brazil and Colombia.

Table 6--U.S. agricultural imports: Value by region, 2012-13

Region and country	October-December		Fiscal year 2012	Share of total 2012	Forecast fiscal year 2013	
	2012	2013			Nov.	Feb.
<b>VALUE</b>	<i>— Billion dollars—</i>			<i>Percent</i>	<i>— Billion dollars—</i>	
Western Hemisphere	13.917	13.500	55.2	53.4	61.8	60.5
Canada	5.138	5.378	20.0	19.3	23.0	22.0
Mexico	3.709	3.828	16.3	15.7	17.5	18.0
Central America	0.932	1.005	5.2	5.0	5.8	5.8
Costa Rica	0.305	0.313	1.5	1.5	1.6	1.6
Guatemala	0.407	0.430	2.0	1.9	2.3	2.2
Other Central America	0.220	0.263	1.7	1.6	1.9	2.0
Caribbean	0.099	0.096	0.6	0.6	0.7	0.7
South America	4.038	3.193	13.1	12.7	14.8	14.0
Argentina	0.485	0.449	1.7	1.7	2.0	1.9
Brazil	1.476	1.091	3.8	3.7	4.3	4.0
Chile	0.421	0.379	2.5	2.4	2.8	2.7
Colombia	0.697	0.511	2.3	2.3	2.5	2.5
Other South America	0.960	0.763	2.8	2.7	3.2	2.9
Europe and Eurasia	4.632	4.813	17.7	17.1	18.9	18.6
European Union-27 1/	4.346	4.449	16.6	16.1	17.7	17.2
Other Europe	0.257	0.337	1.0	0.9	1.1	1.3
Asia	5.190	4.724	22.2	21.5	24.8	23.9
East Asia	1.322	1.519	5.7	5.5	6.2	6.6
China	0.977	1.161	4.3	4.2	4.8	5.2
Other East Asia	0.345	0.358	1.3	1.3	1.4	1.4
Southeast Asia	2.980	2.358	10.9	10.6	12.3	11.4
Indonesia	1.106	0.790	3.7	3.5	4.0	3.8
Malaysia	0.560	0.442	2.0	2.0	2.3	2.1
Thailand	0.580	0.535	2.5	2.4	2.8	2.6
Other Southeast Asia	0.734	0.591	2.8	2.7	3.2	2.9
South Asia	0.888	0.848	5.6	5.5	6.3	5.9
India	0.833	0.796	5.4	5.2	6.0	5.6
Oceania	1.043	1.204	4.9	4.7	5.8	5.9
Australia	0.589	0.709	2.6	2.5	3.1	3.1
New Zealand	0.394	0.462	2.2	2.1	2.5	2.6
Africa	0.513	0.529	2.4	2.3	2.7	2.6
Sub-Saharan Africa	0.445	0.450	2.1	2.0	2.4	2.2
Ivory Coast	0.147	0.162	0.8	0.8	1.1	0.9
Middle East	0.200	0.223	0.9	0.9	1.0	1.0
Turkey	0.116	0.131	0.6	0.5	0.6	0.6
World total	25.495	24.993	103.4	100.0	115.0	112.5

Totals may not add due to rounding.

1/ The former EU-25 plus Romania and Bulgaria.

Sources: U.S. Department of Agriculture 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 forecast errors Fiscal 2010-12					Forecast accuracy Fiscal 2010-12					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
<b>Export value</b>			<i>Percent</i>					<i>"X" if error &lt; 5%</i>			<i>Percent</i>
Grains and feeds	13	6	4	3	2	-	-	X	X	X	60
Wheat	18	6	9	4	4	-	-	-	X	X	40
Rice	12	10	11	8	3	-	-	-	-	X	20
Coarse grains	18	10	7	5	3	-	-	-	X	X	40
Corn	16	9	7	6	3	-	-	-	-	X	20
Feeds and fodders	9	8	8	3	1	-	-	-	X	X	40
Oilseeds and products	15	11	8	5	2	-	-	-	X	X	40
Soybeans	17	9	9	6	3	-	-	-	-	X	20
Soybean meal	23	18	15	6	3	-	-	-	-	X	20
Soybean oil	20	10	4	6	3	-	-	X	-	X	40
Livestock, poultry, and dairy	13	10	6	3	1	-	-	-	X	X	40
Livestock products	10	6	4	3	1	-	-	X	X	X	60
Beef and veal	20	12	8	6	1	-	-	-	-	X	20
Pork	6	4	5	2	4	-	X	X	X	X	80
Beef and pork variety meats	21	18	15	3	8	-	-	-	X	-	20
Hides, skins, and furs	14	13	12	12	7	-	-	-	-	-	0
Poultry and products	8	9	10	6	4	-	-	-	-	X	20
Broiler meat	10	9	10	4	4	-	-	-	X	X	40
Dairy products	29	25	17	12	6	-	-	-	-	-	0
Tobacco, unmanufactured	6	3	3	9	3	-	X	X	-	X	60
Cotton	23	17	8	3	1	-	-	-	X	X	40
Planting seeds	10	7	7	7	5	-	-	-	-	X	20
Horticultural products	3	4	3	1	1	X	X	X	X	X	100
Fruits and vegetables, fresh	4	4	3	2	1	X	X	X	X	X	100
Fruits and veget., processed	3	3	3	3	2	X	X	X	X	X	100
Tree nuts	9	11	6	4	3	-	-	-	X	X	40
Sugar and tropical products	9	5	5	3	3	-	X	X	X	X	80
Major bulk products	17	6	5	3	2	-	-	X	X	X	60
Total agricultural exports	10	7	4	2	1	-	-	X	X	X	60
Average error & accuracy	13	9	7	5	3	10%	21%	38%	62%	90%	44
<b>Export volume</b>											
Wheat	8	3	9	5	3	-	X	-	X	X	60
Rice	11	13	12	7	2	-	-	-	-	X	20
Coarse grains	13	8	8	7	1	-	-	-	-	X	20
Corn	13	8	8	7	1	-	-	-	-	X	20
Feeds and fodders	15	11	7	3	2	-	-	-	X	X	40
Soybeans	7	8	8	5	3	-	-	-	X	X	40
Soybean meal	11	8	6	2	2	-	-	-	X	X	40
Soybean oil	11	7	14	10	5	-	-	-	-	X	20
Beef and veal	16	13	8	4	0	-	-	-	X	X	40
Pork	4	4	2	2	4	X	X	X	X	X	100
Beef and pork variety meats	18	13	14	4	4	-	-	-	X	X	40
Broiler meat	7	6	4	6	2	-	-	X	-	X	40
Tobacco, unmanufactured	0	0	0	0	0	X	X	X	X	X	100
Cotton	10	12	11	8	2	-	-	-	-	X	20
Major bulk products	5	4	5	4	1	X	X	X	X	X	100
Average error & accuracy	10	8	8	5	2	20%	27%	27%	60%	100%	47

- = Error exceeds 5 percent.

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

Country/region	Average forecast errors Fiscal 2010-12					Forecast accuracy Fiscal 2010-12					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
<b>Export value</b>	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					
Asia	14	10	8	4	1	-	-	-	X	X	40
East Asia	15	12	9	4	2	-	-	-	X	X	40
Japan	8	3	3	3	0	-	X	X	X	X	80
China	24	22	17	11	6	-	-	-	-	-	0
Hong Kong	19	11	10	9	4	-	-	-	-	X	20
Taiwan	13	8	7	5	6	-	-	-	X	-	20
South Korea	17	12	12	9	3	-	-	-	-	X	20
Southeast Asia	17	12	10	6	2	-	-	-	-	X	20
Indonesia	23	19	14	8	3	-	-	-	-	X	20
Philippines	16	14	11	6	1	-	-	-	-	X	20
Malaysia	20	12	12	8	7	-	-	-	-	-	0
Thailand	20	16	6	5	5	-	-	-	X	X	40
Vietnam	50	50	6	0	3	-	-	-	X	X	40
South Asia	30	33	33	21	17	-	-	-	-	-	0
India	50	50	7	7	7	-	-	-	-	-	0
Western Hemisphere	7	5	2	1	1	-	X	X	X	X	80
North America	7	5	3	1	1	-	X	X	X	X	80
Canada	6	5	3	1	1	-	X	X	X	X	80
Mexico	11	7	4	2	2	-	-	X	X	X	60
Caribbean	4	3	5	8	3	X	X	X	-	X	60
Dominican Republic	60	60	18	10	10	-	-	-	-	-	0
Central America	9	5	3	3	3	-	X	X	X	X	80
South America	16	10	6	5	3	-	-	-	X	X	40
Brazil	24	24	20	28	8	-	-	-	-	-	0
Colombia	29	31	22	13	4	-	-	-	-	X	20
Peru	75	75	31	0	0	-	-	-	X	X	40
Venezuela	12	10	9	10	3	-	-	-	-	X	20
Europe and Eurasia	13	10	3	4	3	-	-	X	X	X	60
European Union-27	18	15	8	3	2	-	-	-	X	X	40
Other Europe	15	23	23	30	13	-	-	-	-	-	0
FSU-12	12	14	17	14	6	-	-	-	-	-	0
Russia	17	20	19	16	9	-	-	-	-	-	0
Middle East	21	11	9	7	5	-	-	-	-	X	20
Turkey	31	16	16	10	7	-	-	-	-	-	0
Saudi Arabia	16	19	19	7	3	-	-	-	-	X	20
Africa	22	15	7	8	7	-	-	-	-	-	0
North Africa	39	27	14	13	9	-	-	-	-	-	0
Egypt	32	19	11	8	4	-	-	-	-	X	20
Sub-Saharan Africa	14	8	6	6	8	-	-	-	-	-	0
Nigeria	59	50	0	0	0	-	-	X	X	X	60
Oceania	13	11	9	9	4	-	-	-	-	X	20
Transshipments via Canada	56	89	89	89	89	-	-	-	-	-	0
Average error and accuracy	23	21	13	10	7	2%	14%	21%	38%	64%	28

- = Error exceeds 5 percent.

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

Commodity	Average forecast errors Fiscal 2010-12					Forecast accuracy Fiscal 2010-12					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
<b>Import value</b>			<i>Percent</i>					<i>"X" if error ≤ 5%</i>			<i>Percent</i>
Livestock, dairy, and poultry	7	4	3	1	1	-	X	X	X	X	80
Livestock and meats	5	3	2	2	2	X	X	X	X	X	100
Cattle and calves	8	6	6	6	4	-	-	-	-	X	20
Swine	19	11	11	11	11	-	-	-	-	-	0
Beef and veal	9	7	5	4	3	-	-	X	X	X	60
Pork	11	8	6	8	3	-	-	-	-	X	20
Dairy products	16	12	7	3	0	-	-	-	X	X	40
Cheese	16	6	6	3	3	-	-	-	X	X	40
Grains and feed	6	3	3	2	1	-	X	X	X	X	80
Grain products	4	3	4	2	1	X	X	X	X	X	100
Oilseeds and products	18	16	14	7	4	-	-	-	-	X	20
Vegetable oils	19	18	11	7	3	-	-	-	-	X	20
Horticulture products	4	3	3	1	1	X	X	X	X	X	100
Fruits, fresh	4	4	2	3	0	X	X	X	X	X	100
Fruits, preserved	20	16	11	5	4	-	-	-	X	X	40
Fruit juices	30	25	20	8	6	-	-	-	-	-	0
Nuts and preparations	16	14	12	4	4	-	-	-	X	X	40
Vegetables, fresh	7	8	8	3	2	-	-	-	X	X	40
Vegetables, processed	3	2	2	2	2	X	X	X	X	X	100
Wine	5	4	5	3	1	X	X	X	X	X	100
Malt beer	5	2	1	2	4	X	X	X	X	X	100
Essential oils	7	3	3	1	4	-	X	X	X	X	80
Cut flowers and nursery stock	2	2	2	2	0	X	X	X	X	X	100
Sugar and tropical products	10	12	11	6	4	-	-	-	-	X	20
Sweeteners and products	34	31	32	9	10	-	-	-	-	-	0
Confections	5	3	3	0	0	X	X	X	X	X	100
Cocoa and products	9	11	11	12	8	-	-	-	-	-	0
Coffee beans and products	17	15	15	8	5	-	-	-	-	X	20
Natural rubber	24	30	26	22	13	-	-	-	-	-	0
Other imports	10	9	11	4	2	-	-	-	X	X	40
Total agricultural imports	6	4	4	3	2	-	X	X	X	X	80
Average error and accuracy	11	10	8	5	3	29%	42%	45%	65%	84%	53
<b>Import volume</b>											
Wine (HL)	13	6	6	0	0	-	-	-	X	X	40
Malt beer (HL)	5	1	2	4	3	X	X	X	X	X	100
Fruit juices (HL)	12	13	11	2	1	-	-	-	X	X	40
Cattle and calves	6	7	7	12	3	-	-	-	-	X	20
Swine	4	2	1	1	1	X	X	X	X	X	100
Beef and veal	23	14	9	5	5	-	-	-	X	X	40
Pork	0	0	8	8	8	X	X	-	-	-	40
Fruits--fresh	1	2	2	4	2	X	X	X	X	X	100
Fruits--processed	9	4	2	2	2	-	X	X	X	X	80
Vegetables--fresh	6	7	6	6	1	-	-	-	-	X	20
Vegetables--processed	4	2	2	1	1	X	X	X	X	X	100
Vegetable oils	3	3	3	5	3	X	X	X	X	X	100
Cocoa and products	8	8	6	11	6	-	-	-	-	-	0
Coffee beans and products	10	5	7	5	2	-	X	-	X	X	60
Average error and accuracy	7	5	5	5	3	43%	57%	43%	71%	86%	60

- = Error exceeds 5 percent. HL = hectoliters.

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

Country/region	Average forecast errors Fiscal 2010-12					Forecast accuracy Fiscal 2010-12					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
<b>Import value</b>	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Western Hemisphere	6	4	4	3	2	-	X	X	X	X	80
Canada	7	1	2	4	3	-	X	X	X	X	80
Mexico	9	7	5	3	2	-	-	X	X	X	60
Central America	6	7	10	5	1	-	-	-	X	X	40
Costa Rica	10	2	2	3	2	-	X	X	X	X	80
Guatemala	8	7	12	8	2	-	-	-	-	X	20
Other Central America	9	9	14	8	7	-	-	-	-	-	0
Caribbean	11	6	6	6	0	-	-	-	-	X	20
South America	8	6	5	5	3	-	-	X	X	X	60
Argentina	21	12	14	11	7	-	-	-	-	-	0
Brazil	10	8	5	12	7	-	-	X	-	-	20
Chile	3	4	1	0	0	X	X	X	X	X	80
Colombia	12	10	6	6	3	-	-	-	-	X	20
Other South America	10	6	7	7	4	-	-	-	-	X	20
Europe and Eurasia	5	2	3	1	1	X	X	X	X	X	80
European Union-27	5	2	3	1	0	X	X	X	X	X	80
Other Europe	16	8	12	8	0	-	-	-	-	X	20
Asia	11	10	7	4	3	-	-	-	X	X	40
East Asia	6	9	5	2	3	-	-	X	X	X	60
China	7	10	5	3	3	-	-	X	X	X	60
Other East Asia	3	8	8	3	0	X	-	-	X	X	40
Southeast Asia	17	17	14	11	6	-	-	-	-	-	0
Indonesia	20	21	18	17	6	-	-	-	-	-	0
Malaysia	27	21	15	19	9	-	-	-	-	-	0
Thailand	14	15	12	7	3	-	-	-	-	X	20
Other Southeast Asia	12	12	10	5	1	-	-	-	X	X	40
South Asia	32	28	23	15	2	-	-	-	-	X	20
India	33	28	23	19	6	-	-	-	-	-	0
Oceania	10	7	8	6	5	-	-	-	-	X	20
Australia	7	6	8	6	5	-	-	-	-	X	20
New Zealand	15	10	8	6	2	-	-	-	-	X	20
Africa	19	21	19	13	7	-	-	-	-	-	0
Sub-Saharan Africa	21	24	21	14	6	-	-	-	-	-	0
Ivory Coast	19	34	32	32	18	-	-	-	-	-	0
Middle East	15	7	11	4	4	-	-	-	X	X	40
Turkey	15	8	21	14	6	-	-	-	-	-	0
Average error & accuracy	13	11	11	8	4	11%	17%	31%	42%	69%	32

- = Error exceeds 5 percent.

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Pork & Hogs: Leslie Ahmed/FAS, 720-2781

Poultry: Dave Harvey/ERS, 694-5177  
Lazaro Sandoval/FAS, 690-8478

Dairy Products: Paul Kiendl/FAS, 720-8870

#### Horticultural & Tropical Products:

Deciduous Fresh Fruit: Meyra Mendoza-Reeder/FAS, 720-0262

Fresh Citrus: Reed Blauer/FAS, 720-0898

Vegetables & Preparations: Andy Sowell/FAS, 720-0262

Tree Nuts: Tony Halstead/FAS, 690-4620

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

Outlook for U.S. Agricultural Trade

<http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1196>

Foreign Agricultural Service homepage: <http://www.fas.usda.gov/>

Economic Research Service homepage: <http://www.ers.usda.gov/>

U.S. Trade Data: <http://www.fas.usda.gov/gats>

FAQ & Summary Data: [http://www.ers.usda.gov/data-products/foreign-agricultural-trade-of-the-united-states-\(fatus\).aspx](http://www.ers.usda.gov/data-products/foreign-agricultural-trade-of-the-united-states-(fatus).aspx)

Articles on U.S. Trade: <http://www.ers.usda.gov/topics/international-markets-trade/us-agricultural-trade.aspx>

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