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Economic Research Service and Foreign Agricultural Service*

Outlook for U.S. Agricultural Trade

FY 2013 Exports Forecast at a Record \$139.5 Billion; Imports at a Record \$111 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 \$139.5 billion, down \$2.5 billion from the February forecast and \$3.7 billion above fiscal 2012 exports. The forecast for grain and feed exports is down \$2.8 billion from February, primarily reflecting lower export volumes and unit values for wheat and corn. Sugar and tropical product exports are also forecast lower, down \$500 million from the last forecast. The forecast for oilseeds and products is raised slightly and the forecast for cotton exports is \$500 million higher. The forecast for livestock, poultry, and dairy is unchanged from last quarter, at a record \$30.1 billion. The export forecast for horticultural products is unchanged at a record \$32.0 billion.

U.S. agricultural imports are forecast at a record \$111 billion, \$1.5 billion lower than the February forecast, but \$7.6 billion higher than in fiscal 2012. Lower forecasts for tropical products account for most of the reduction from February.

The forecast trade balance for fiscal 2013 is lowered \$1 billion to \$28.5 billion, down \$3.9 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	
							Feb.	May
<i>Billion dollars</i>								
Exports	82.2	114.9	96.3	108.6	137.4	135.8	142.0	139.5
Imports	70.1	79.3	73.4	79.0	94.5	103.4	112.5	111.0
Balance	12.2	35.6	22.9	29.6	42.9	32.4	29.5	28.5

Reflects forecasts in the May 6, 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

World growth in 2013 is expected to be 2.5 percent, up from 2012's 2.3 percent, but still below the 2.9 percent rate of 2011. Trade growth, which in 2012 had dropped to 2 percent from a robust 7 percent in 2011, is slated to rise 3 percent in 2013. Asian gross domestic product (GDP) growth in 2013 is expected to slow as Asia's exports to Europe shrink. China and other emerging Asian economies, in pursuing policies of slower but more balanced growth, are becoming less export dependent, seeing more domestic demand driven by higher wages, rising consumer spending and housing growth. South Korea, India, Vietnam, and New Zealand are expecting growth pick-ups in 2013, keeping Asian growth solid. Moreover, higher Western Hemispheric and African growth is expected to offset the impact of Europe's continued recession on developing economies' exports and provide further insurance against a worldwide slowdown. In particular, Brazil and Argentina are expected to see 3 percent growth in 2013, due to strong export growth, higher investment, and high commodity prices.

World trade growth is expected to accelerate to 3 percent in 2013. Europe's recession and Japan's growth slowdown are the major factors preventing more rapid trade and world economic growth in 2013. The dollar, which appreciated by 2.7 percent in 2012, is expected to rise 1.0 percent in 2013 due largely to the expected 7.5 percent appreciation against the yen and widespread easing of monetary policy in developing nations. The dollar's rise is also the result of increasingly attractive U.S. financial assets as growth stabilizes in the United States and financial investment prospects diminish in other developed countries. Since the dollar was very low in 2011, the recent appreciation still leaves the dollar at a level that is favorable for U.S. exports. A favorable exchange rate and solid growth in developing Asia and Latin America will continue to support U.S. exports. The stronger U.S. economy will lift U.S. import demand even as exports rise in 2013, while a mildly stronger dollar and a still-sluggish world economy help keep import prices down.

Lower U.S. energy prices and more available credit make the outlook for U.S. agricultural trade promising in 2013. Because of high transport costs for U.S. energy exports, expanding U.S. energy supplies from natural gas and oil fields will be available at a discount on domestic U.S. markets. Farmers will continue to benefit from lower fuel and fertilizer costs in 2013, facilitating higher output and higher trade volumes.

The main, but low probability, downside risk to world growth in 2013 is an indirect currency war as nations undertake large-scale monetary expansion in order to reduce the risk of a growth slowdown. Most financial analysts consider a significant spillover of the Eurozone problems to North American and Asian financial institutions unlikely in 2013. On the upside, continued inexpensive credit for financing trade and higher developing economies' growth will boost U.S. and world exports. Rising world trade is expected to support continuing world growth, especially in developing economies. Overall, world macroeconomic factors will continue to be favorable for U.S. farm exports in 2013.

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

Region/country	Share of world GDP (2010)	Income		Real exchange rate 2/		Prices	
		2012	2013	2012	2013	2012	2013
		Growth rate				Growth rate	
World (U.S. trade-weighted)	100.0	2.3	2.5	2.7	1.1	3.1	2.8
NAFTA	30.3	2.3	2.5	-0.2	-0.1	2.1	1.9
Canada	2.4	1.8	1.9	1.6	1.6	1.3	2.2
United States	26.2	2.2	2.5	0.0	0.0	2.1	1.8
Mexico	1.6	4.0	3.6	-5.4	-3.6	4.1	3.6
Latin American and Caribbean	7.2	2.2	3.3	2.6	5.8	5.1	5.5
Argentina	0.5	2.0	2.9	2.0	10.0	4.6	6.2
Brazil	2.4	0.9	2.9	13.4	6.5	5.4	6.3
Europe	30.1	-0.3	-0.3	8.0	-0.5	2.3	1.8
Asia and Oceania	26.6	4.4	4.1	0.3	3.1	2.9	2.8
China	7.5	7.8	7.7	-3.0	-1.2	2.6	2.8
Japan	8.8	2.0	1.0	2.2	7.5	0.0	-0.3
South Korea	2.0	2.0	2.6	1.6	-2.5	2.2	1.6
Indonesia	0.8	6.2	5.9	4.8	-1.7	4.3	5.2
Vietnam	0.1	5.0	5.4	-5.5	-3.2	9.1	7.7
India	2.3	5.1	5.8	1.7	7.6	9.3	8.3
Australia	1.6	3.6	2.7	-0.1	2.4	1.7	1.9
New Zealand	0.2	2.2	2.6	-1.4	1.4	1.0	1.8
Middle East	3.2	3.1	3.5	1.0	0.5	10.4	9.9
Turkey	0.8	2.3	3.7	0.4	-3.4	8.9	6.6
Africa	2.4	5.2	5.6	-1.0	-1.0	7.3	7.3

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

Fiscal 2013 grain and feed exports are forecast at \$30.0 billion, down \$2.8 billion from the February forecast. Lower expected exports of wheat and corn account for most of the decline. Wheat is \$1.2 billion lower at \$9.0 billion, a drop that reflects strong competition from all other major exporting countries. Global production is projected at a record in 2013/14 while U.S. production is down, limiting U.S. exportable supplies. The United States is likely to be uncompetitive for the remainder of the fiscal year in many markets as domestic prices remain relatively strong, supported by tight corn supplies through summer.

The forecast for coarse grains is lowered \$1.7 billion to \$6.7 billion, mostly due to lower corn volume. Since last quarter, corn prices have weakened nearly 5 percent in the face of stronger competition (especially from Argentina and Brazil). Feeds and fodders exports offset some of this decline, up nearly \$150 million since February's forecast, principally on higher volumes. Distiller's dried grains (DDGS) are nearly unchanged as a higher volume forecast—up more than 1 million tons—is offset by lower expected unit values. Rice exports are up \$100 million to \$2.2 billion, largely on stronger sales to South America, the Middle East, and North Africa.

The fiscal 2013 export forecast for oilseeds and products is raised \$200 million to \$32.6 billion. Larger soybean meal volume is partially offset by across-the-board declines in unit values for all products. Soybeans are fractionally lower at \$22.1 billion on reduced unit value. Soybean oil is lower due to tight supplies and growing biodiesel demand. A rebound in South American exports and tight U.S. supplies will limit U.S. exports of most oilseed products through the remainder of the year.

The fiscal 2013 cotton export forecast is raised \$500 million to \$5.5 billion. The higher export volume is driven by strong demand by Southeast Asia as well as China, which is purchasing domestic supplies for the State reserve.

The fiscal 2013 export forecast for livestock, dairy, and poultry is unchanged at a record \$30.1 billion. Declines in pork, broiler meat, and animal fats offset gains for dairy, beef, and hides and skins. Pork exports are lowered \$300 million to \$5.0 billion on smaller volumes and lower prices mostly due to weaker Asian and Mexican demand and SPS (sanitary and phytosanitary) restrictions in Russia. Dairy products are raised \$300 million to \$5.3 billion on stronger global demand, concerns about dryness in Oceania, and lagging milk production in the European Union (EU). Beef is raised marginally to \$5.1 billion. Improved market access for U.S. beef in Japan and Hong Kong combined with strong demand in other key markets are expected to offset restrictions by Russia. Hides and skins are raised \$200 million to \$3.0 billion.

The fiscal 2013 export forecast for horticultural products is unchanged at a record \$32.0 billion. For most products, higher value is due primarily to higher unit values, a driving force over the last several years. The fresh fruit and vegetable export forecast remains at \$7.6 billion, with exports to Canada, Europe, and Japan expected to continue rising. Processed fruit and vegetable exports are unchanged at \$7.4 billion, based on expected 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.

U.S. fiscal 2013 sugar and tropical product exports are forecast \$500 million lower than in February. The decline to \$6.5 billion is 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-March		Fiscal year 2012	Forecast fiscal 2013	
	2012	2013		Feb.	May
VALUE					
— Billion dollars —					
Grains and feeds 1/	16.710	14.703	33.404	32.8	30.0
Wheat 2/	3.632	4.091	8.353	10.2	9.0
Rice	1.050	1.232	1.988	2.1	2.2
Coarse grains 3/	6.572	3.295	11.736	8.4	6.7
Corn	6.359	2.949	11.240	7.8	6.0
Feeds and fodders	3.322	3.874	6.908	7.5	7.6
Oilseeds and products 4/	16.853	25.360	28.638	32.4	32.6
Soybeans	12.784	18.352	19.797	22.2	22.1
Soybean meal 5/	1.710	3.770	3.876	4.3	4.8
Soybean oil	0.315	0.857	0.830	1.3	1.2
Livestock, poultry, and dairy	14.917	15.035	29.800	30.1	30.1
Livestock products	9.312	9.318	18.474	18.8	18.5
Beef and veal 6/	2.276	2.383	4.770	5.0	5.1
Pork 6/	2.973	2.671	5.552	5.4	5.0
Beef and pork variety meats 6/	0.732	0.760	1.406	1.4	1.4
Hides, skins, and furs	1.275	1.373	2.764	2.8	3.0
Poultry and products	3.029	3.160	6.157	6.3	6.3
Broiler meat 6/ 7/	2.002	2.110	4.112	4.2	4.1
Dairy products	2.575	2.557	5.170	5.0	5.3
Tobacco, unmanufactured	0.781	0.822	1.052	1.1	1.1
Cotton	3.786	3.028	6.553	5.0	5.5
Seeds	0.953	1.061	1.468	1.5	1.5
Horticultural products 8/	14.422	16.076	28.644	32.0	32.0
Fruits and vegetables, fresh	3.261	3.530	6.996	7.6	7.6
Fruits and vegetables, processed 8/	3.294	3.502	6.840	7.4	7.4
Tree nuts, whole and processed	3.685	4.321	6.106	7.0	7.0
Sugar and tropical products 9/	2.993	3.068	6.198	7.0	6.5
Major bulk products 10/	28.605	30.820	49.479	49.0	46.7
Total	71.423	79.180	135.775	142.0	139.5
VOLUME					
— Million metric tons —					
Wheat 2/	11.756	11.720	26.903	28.9	26.9
Rice	1.808	2.172	3.603	3.7	3.9
Coarse grains 3/	22.636	10.285	40.103	25.9	21.8
Corn	21.900	9.105	38.370	24.0	19.5
Feeds and fodders	8.692	8.573	17.540	16.6	17.6
Soybeans	26.354	30.523	38.397	36.6	36.7
Soybean meal 5/	4.570	6.864	8.837	8.0	9.0
Soybean oil	0.249	0.736	0.664	1.0	1.0
Beef and veal 6/	0.412	0.388	0.834	0.8	0.8
Pork 6/	0.978	0.879	1.837	1.8	1.7
Beef and pork variety meats 6/	0.410	0.385	0.754	0.7	0.7
Broiler meat 6/ 7/	1.640	1.654	3.299	3.3	3.3
Tobacco, unmanufactured	0.124	0.108	0.167	0.2	0.2
Cotton	1.454	1.610	2.716	2.7	2.9
Major bulk products 10/	64.131	56.417	111.889	98.0	92.4

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 \$139.5 billion, which is \$2.5 billion below the February forecast but remains a record. Lower expected exports to Central America, Japan, South Korea, Mexico, and several other markets outweigh increases this quarter for China, Southeast Asia, Colombia, and India.

Asia

Japan is forecast down \$800 million to \$12.7 billion due to both lower corn exports for the first half of the year and reduced prospects for the remainder of the fiscal year. Tight U.S. supplies have boosted Brazilian corn exports to Japan. Reduced corn exports are also behind a fall in the forecast to South Korea of \$600 million. Though soybean shipments have been strong, corn exports for the first half of the year are down 88 percent compared to the same period last year. Exports to Taiwan are down from the February forecast by \$300 million to \$3.3 billion. Nevertheless, the forecast remains above last year's total, as shipments for October through March are up for every major product category except corn.

China continues as the largest export market as shipments for the first half of the year were nearly 40 percent greater than those to Canada, which is the second largest market. Given the record strong pace of exports, the forecast for China is raised \$500 million to \$22.5 billion. Increased soybean, tree nut, poultry product, and wheat exports far outweigh a decrease in cotton and corn exports compared to last year. However, shipments of soybeans are expected to slow the second half of the year due to increased competition from a record soybean harvest in South America.

The forecast for Vietnam is raised \$500 million to a record \$2.1 billion based on increased soybean and soybean meal sales. Soybean exports to Thailand have also been strong, with the overall export forecast raised \$400 million to \$1.3 billion. India is raised \$200 million on increased soybean oil and almond shipments.

Western Hemisphere

Despite increased soybean, horticultural product, and broiler meat exports, the forecast for Mexico is lowered \$500 million to \$18 billion based on sharply reduced corn shipments for the first half of the year. Abundant corn supplies in Mexico should also restrain exports for the remainder of the fiscal year. Reduced corn exports are also responsible for a reduction of \$1 billion in the forecast for Central America. Brazilian corn is replacing U.S. supplies in the region, particularly in Guatemala and El Salvador. Despite lower corn exports, the forecast for Colombia is raised \$300 million due to the very strong pace of wheat, soybean, and soybean meal exports. In fact, U.S. exports for October through March were more than double shipments the same period last year.

Europe, Africa, and the Middle East

The forecast for exports to Sub-Saharan Africa is lowered \$400 million to \$2.7 billion, which is even with last year's exports. Total shipments of agricultural products for the first half of the year are nearly identical to last year's pace, as greater broiler meat exports are offset by slight reductions to most other product categories. The export forecast for the Middle East is also lowered, by \$500

million, though the forecast for the top two markets in the region (Turkey and Saudi Arabia) are unchanged. Exports to the region have been strong due to soybean, soybean meal, wheat, distiller's grains, and hay shipments. However, prospects for the second half of the year are lowered due to expected increased competition, especially from South American soybeans and soybean meal.

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

Country and region 1/	October-March		Fiscal year	Share of	Forecast fiscal year	
	2012	2013	2012	2012 total	2013	
	– Billion dollars –			Percent	– Billion dollars –	
					Feb.	May
Asia	33.917	36.842	60.382	44.5	60.5	60.1
East Asia	28.793	30.378	49.825	36.7	49.1	47.6
Japan	7.023	6.424	13.770	10.1	13.5	12.7
China	14.624	17.160	23.359	17.2	22.0	22.5
Hong Kong	1.997	1.945	3.381	2.5	3.7	3.4
Taiwan	1.715	1.858	3.093	2.3	3.6	3.3
South Korea	3.424	2.976	6.203	4.6	6.3	5.7
Southeast Asia	4.425	5.478	9.153	6.7	9.6	10.5
Indonesia	1.136	1.226	2.470	1.8	2.5	2.5
Philippines	1.092	1.275	2.304	1.7	2.4	2.4
Malaysia	0.455	0.538	0.876	0.6	1.0	1.0
Thailand	0.603	0.834	1.304	1.0	0.9	1.3
Vietnam	0.791	1.241	1.500	1.1	1.6	2.1
South Asia	0.699	0.986	1.404	1.0	1.8	2.0
India	0.376	0.594	0.764	0.6	0.8	1.0
Western Hemisphere	24.948	26.224	50.770	37.4	53.0	51.8
North America	19.007	19.425	38.898	28.6	39.5	39.0
Canada	9.496	10.499	20.008	14.7	21.0	21.0
Mexico	9.512	8.926	18.890	13.9	18.5	18.0
Caribbean	1.825	1.956	3.426	2.5	3.7	3.7
Dominican Republic	0.598	0.609	1.044	0.8	1.1	1.1
Central America	1.881	1.722	3.557	2.6	4.3	3.3
South America	2.234	3.121	4.889	3.6	5.5	5.8
Brazil	0.247	0.308	0.509	0.4	0.7	0.7
Colombia	0.348	0.808	0.843	0.6	1.1	1.4
Peru	0.289	0.296	0.581	0.4	0.5	0.5
Venezuela	0.684	0.823	1.527	1.1	1.7	1.7
Europe/Eurasia	5.918	8.391	11.293	8.3	12.7	12.7
European Union-27 2/	4.729	6.939	8.872	6.5	10.2	10.2
Other Europe 3/	0.263	0.371	0.470	0.3	0.4	0.4
FSU-12 4/	0.927	1.082	1.952	1.4	2.1	2.1
Russia	0.710	0.820	1.504	1.1	1.8	1.8
Middle East	2.978	3.628	5.804	4.3	7.6	7.1
Turkey	1.053	1.451	1.882	1.4	2.3	2.3
Saudi Arabia	0.581	0.621	1.135	0.8	1.1	1.1
Africa	2.709	3.114	5.681	4.2	6.8	6.4
North Africa	1.425	1.828	2.977	2.2	3.7	3.7
Egypt	0.826	1.232	1.785	1.3	2.0	2.0
Sub-Saharan Africa	1.284	1.286	2.704	2.0	3.1	2.7
Nigeria	0.515	0.504	1.076	0.8	1.1	1.1
Oceania	0.138	0.164	1.722	1.3	1.5	1.5
Trans-shipments via Canada 5/	0.122	0.000	0.122	0.1	0.0	0.0
Total	71.423	79.180	135.830	100.0	142.0	139.5

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

Consumer spending for food and beverages in the United States over the past year has slowed from the preceding year. As in 2012, spending at food services (food away from home) is still stronger than spending for food consumed at home, although both were weaker during the last four quarters. Furthermore, prices of many key imported farm commodities—such as coffee, cocoa, sugar, rubber, and tropical vegetable oils—have fallen sharply from their 2012 levels. The downward effect of these domestic food spending developments and lower import prices on U.S. agricultural imports is partly offset by the relatively strong 3.2-percent growth in personal disposable income in the past year through March 2013. The net result is a \$1.5-billion reduction in the fiscal 2013 import projection to \$111 billion from the previous estimate of \$112.5 billion. This import value still represents a 7-percent gain from 2012, when agricultural imports grew 9 percent.

The largest import projection declines compared with the February forecasts are \$2.3 billion for sugar and tropical products and \$500 million for oilseeds and oilseed products, including vegetable oils. The import volume of sugar and tropical products (coffee, cocoa, rubber) is down 11 percent in the first half of fiscal 2013 despite lower import unit values. These lower forecasts are partly offset by a \$1.2-billion increase for projected horticultural product imports and \$500 million more for livestock and dairy products. In the first half of fiscal 2013, the import volume of horticultural products is up more than 5 percent while corresponding import unit values are up only marginally. In addition, the volume of imported grains and feeds is up 34 percent, mostly from new corn shipments.

The volume of tropical product imports is down from the year before in the first half of fiscal 2013, except for spices, herbs, and honey. Since import unit values for sugar, coffee, cocoa, and natural rubber are down as well, their import values show sharp declines. Lower import demand for these tropical products, however, does not extend to tropical oils as import volumes for coconut and palm oils are up as their import prices have gone down. By contrast, palm kernel oil has lower import volume thus far. While import volumes of other vegetable oils as a group are down as well, olive oil imports are up. Nevertheless, import demand for canola oil is down sharply thus far as domestic canola production is expected to increase 1 percent.

Coffee prices from Brazil dropped to \$1.30 per pound in March 2013, but then rose to \$1.39 in the futures market by May. The cocoa bean price in April was \$2,295 per metric ton, but rose to \$2,312 in May. Sugar's U.S. import futures price was 20.73 cents per pound in April, higher than its spot price of 17.66 cents (for Caribbean sugar in New York). These developments for tropical commodities in the futures market indicate a recent leveling of prices, or perhaps even the end of a period of decline.

Increased demand by American consumers for imported fruits and vegetables relative to fiscal 2012 raised projections for fresh produce by \$1.1 billion. Fresh fruit imports alone are estimated at \$9 billion for fiscal 2013, which is almost as large as oilseeds and products imports or livestock and meats. Among the highly popular fresh fruit imports are grapes, strawberries, avocados, mangos, melons, pineapples, and blueberries. The largest fresh vegetable shipments are greenhouse

tomatoes, asparagus, bell peppers, onions, chili peppers, and squash. For processed produce, the biggest imported items are apple juice concentrate, frozen orange juice, frozen French-fried potatoes, and processed olives. Other popular processed horticultural imports are wine, beer, essential oils, cashew nuts, and cut flowers. In total, the projected \$47 billion worth of horticultural imports in 2013 are 13 percent more than in 2012 and comprise 42 percent of all U.S. agricultural imports. This share, however, is lower than 45 percent in 2010 but higher than in 2011 and 2012. The continued decline in U.S. beef production will affect beef imports only marginally. Beef and veal imports are lowered fractionally based on slightly lower volumes. However, cattle imports are raised by 200,000 head, or by \$400 million, as tight U.S. supplies draw more animals from Canada and Mexico. On the other hand, larger hog numbers and increased pork production is expected to reduce swine imports by 49,000 head and value by \$41 million, but imported pork is unchanged. Imports of dairy products are projected higher in part due to higher dairy product prices. Combining dairy products with other livestock and meat imports, their total import value is estimated at \$14.8 billion this fiscal year, up \$500 million from the preceding forecast and 11 percent higher than last year.

U.S. wheat imports in fiscal 2013 are anticipated to be 12 percent larger than in the previous year. Imported feed grains are projected to be twice as large as in fiscal 2012. Corn imports thus far are up 900 percent because of the drought-decimated domestic crop last season. These bulk grain shipments push imported grains and feeds up \$2 billion more than in 2012, of which \$350 million are from processed grain products. Since 2003, U.S. import values of bulk grains expanded annually by 16 percent on average compared to 10 percent for processed grain products and feeds.

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

Commodity	October-March		Fiscal year	Forecast fiscal year	
	2012	2013		2013	
			2012	Feb.	May
VALUE					
--- Billion dollars ---					
Livestock and dairy products	6.631	7.056	13.281	14.3	14.8
Livestock and meats	4.794	5.118	9.653	10.3	10.8
Cattle and calves	0.935	1.057	1.704	1.5	1.9
Swine	0.194	0.163	0.347	0.4	0.3
Beef and veal	1.645	1.760	3.623	4.1	4.1
Pork	0.691	0.680	1.334	1.3	1.3
Dairy products	1.536	1.617	3.013	3.1	3.2
Cheese	0.560	0.608	1.060	1.1	1.2
Grains and feed	4.743	5.588	9.515	11.6	11.5
Grain products	2.862	3.017	5.749	6.2	6.1
Oilseeds and products	4.458	4.260	8.654	9.7	9.2
Vegetable oils	3.028	2.557	5.759	5.6	5.4
Horticulture products	21.197	22.291	41.557	45.8	47.0
Fruits, fresh	4.010	4.315	7.618	8.4	9.0
Fruits, processed	2.120	2.412	4.358	5.7	5.7
Fruit juices	0.887	1.053	1.762	1.9	2.2
Nuts, whole and processed	0.916	0.837	1.801	2.0	2.0
Vegetables, fresh	3.342	3.567	5.831	6.0	6.5
Vegetables, processed	2.175	2.131	4.202	4.5	4.4
Wine	2.509	2.678	5.084	5.7	5.7
Malt beer	1.734	1.694	3.722	3.9	3.8
Essential oils	1.238	1.344	2.569	2.7	2.9
Cut flowers and nursery stock	0.861	0.879	1.624	1.7	1.7
Sugar and tropical products	14.140	11.314	28.318	28.3	26.0
Sweeteners & products	2.557	2.236	5.223	4.6	5.0
Confections	0.691	0.726	1.461	1.6	1.6
Cocoa and chocolate	2.320	2.081	4.117	4.5	4.1
Coffee beans and products	4.304	2.920	7.789	7.4	6.4
Rubber, natural	2.090	1.375	3.791	3.9	3.1
Other imports 1/	1.014	1.185	2.048	2.8	2.5
Total agricultural imports	52.185	51.694	103.372	112.5	111.0
VOLUME					
--- Million metric tons 2/---					
Wine 3/	0.616	0.622	1.202	1.3	1.3
Malt beer 3/	1.532	1.461	3.287	3.3	3.2
Fruit juices 3/	1.775	2.477	3.591	4.0	5.0
Cattle and calves 4/	1.347	1.238	2.331	2.0	2.2
Swine 4/	2.948	2.707	5.779	5.5	5.4
Beef and veal	0.347	0.350	0.744	0.8	0.8
Pork	0.184	0.180	0.354	0.3	0.3
Fruits, fresh	4.656	5.105	9.599	10.5	10.6
Fruits, processed	0.712	0.807	1.502	1.8	1.8
Vegetables, fresh	3.345	3.387	5.696	5.9	5.9
Vegetables, processed	1.658	1.616	3.202	3.4	3.3
Vegetable oils	2.092	1.887	3.976	4.0	3.8
Cocoa and chocolate	0.698	0.636	1.234	1.3	1.2
Coffee beans	0.773	0.710	1.539	1.6	1.5

Totals may not add due to rounding.

1/ Largely tobacco and planting seeds. 2/ With exceptions footnoted. 3/Liquid volume is in billion liters.

4/ Million head.

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

Regional Imports

In terms of import shipment volume, the fastest growing major suppliers to the United States over the past decade are, by rank: Malaysia, India, China, Mexico, Ivory Coast, Guatemala, Brazil, Argentina, Canada, and Chile. Not by coincidence, these countries are also the top exporters of tropical and horticultural products to the United States. Thus, the corresponding U.S. import values from 2003 to 2012 with respect to these sources have grown by about the same average rates, resulting in roughly equivalent rankings.

The share of total U.S. agricultural import value over the past 5 years (2008 to 2012) compared to the preceding 5 years (2003 to 2007) has grown the most for Malaysia, India, China, Indonesia, Thailand, Argentina, Guatemala, and Mexico. These countries' exports to the United States represented 37 percent of U.S. agricultural imports in 2012, up from 29 percent in 2007 and 25 percent in 2002. The rest of the major exporters to the United States—including Canada, Australia, Costa Rica, New Zealand, and Turkey—comprised a smaller share of U.S. imports in the past 5 years than the preceding 5 years.

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

Region and country	October-March		Fiscal year 2012	Share of total 2012	Forecast fiscal year 2013	
	2012	2013			Feb.	May
	VALUE	<i>— Billion dollars—</i>		<i>Percent</i>	<i>— Billion dollars—</i>	
Western Hemisphere	28.996	28.850	55.2	53.4	60.5	60.5
Canada	10.064	10.624	20.0	19.3	22.0	22.6
Mexico	8.537	8.771	16.3	15.7	18.0	18.3
Central America	2.372	2.240	5.2	5.0	5.8	5.6
Costa Rica	0.710	0.711	1.5	1.5	1.6	1.7
Guatemala	0.942	0.901	2.0	1.9	2.2	2.1
Other Central America	0.719	0.628	1.7	1.6	2.0	1.7
Caribbean	0.256	0.224	0.6	0.6	0.7	0.7
South America	7.766	6.991	13.1	12.7	14.0	13.2
Argentina	0.936	0.885	1.7	1.7	1.9	1.9
Brazil	2.404	2.014	3.8	3.7	4.0	3.6
Chile	1.471	1.539	2.5	2.4	2.7	2.7
Colombia	1.337	1.086	2.3	2.3	2.5	2.1
Other South America	1.618	1.467	2.8	2.7	2.9	2.8
Europe and Eurasia	8.839	9.340	17.7	17.1	18.6	19.1
European Union-27 1/	8.296	8.582	16.6	16.1	17.2	17.5
Other Europe	0.490	0.705	1.0	0.9	1.3	1.5
Asia	10.295	9.189	22.2	21.5	23.9	21.6
East Asia	2.715	2.934	5.7	5.5	6.6	6.5
China	2.063	2.246	4.3	4.2	5.2	5.0
Other East Asia	0.653	0.687	1.3	1.3	1.4	1.5
Southeast Asia	5.624	4.678	10.9	10.6	11.4	10.1
Indonesia	1.962	1.556	3.7	3.5	3.8	3.2
Malaysia	1.116	0.877	2.0	2.0	2.1	1.8
Thailand	1.212	1.078	2.5	2.4	2.6	2.4
Other Southeast Asia	1.335	1.167	2.8	2.7	2.9	2.6
South Asia	1.956	1.577	5.6	5.5	5.9	4.9
India	1.839	1.465	5.4	5.2	5.6	4.6
Oceania	2.251	2.513	4.9	4.7	5.9	5.9
Australia	1.176	1.353	2.6	2.5	3.1	3.1
New Zealand	0.965	1.104	2.2	2.1	2.6	2.6
Africa	1.318	1.237	2.4	2.3	2.6	2.6
Sub-Saharan Africa	1.167	1.060	2.1	2.0	2.2	2.1
Ivory Coast	0.602	0.510	0.8	0.8	0.9	0.9
Middle East	0.485	0.565	0.9	0.9	1.0	1.2
Turkey	0.298	0.361	0.6	0.5	0.6	0.8
World total	52.185	51.694	103.4	100.0	112.5	111.0

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.

Table 7--Reliability of quarterly U.S. export projections, by commodity and quarter

Commodity	Average forecast errors Fiscal 2001-12					Forecast accuracy Fiscal 2001-12					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	15	10	6	4	2	-	-	-	X	X	40
Wheat	19	14	10	7	5	-	-	-	-	X	20
Rice	11	12	12	7	4	-	-	-	-	X	20
Coarse grains	23	14	9	4	2	-	-	-	X	X	40
Corn	23	15	9	4	3	-	-	-	X	X	40
Feeds and fodders	12	9	8	5	3	-	-	-	X	X	40
Oilseeds and products	13	11	8	5	2	-	-	-	X	X	40
Soybeans	16	11	9	6	3	-	-	-	-	X	20
Soybean meal	20	18	15	10	4	-	-	-	-	X	20
Soybean oil	33	26	14	8	10	-	-	-	-	-	0
Livestock, poultry, and dairy	14	10	7	4	2	-	-	-	X	X	40
Livestock products	13	9	5	3	3	-	-	X	X	X	60
Beef and veal	29	26	10	11	6	-	-	-	-	-	0
Pork	12	5	6	4	3	-	X	-	X	X	60
Beef and pork variety meats	22	15	8	6	12	-	-	-	-	-	0
Hides, skins, and furs	15	12	12	6	3	-	-	-	-	X	20
Poultry and products	13	11	11	6	4	-	-	-	-	X	20
Broiler meat	16	17	14	7	3	-	-	-	-	X	20
Dairy products	27	21	15	10	5	-	-	-	-	X	20
Tobacco, unmanufactured	8	7	7	9	5	-	-	-	-	X	20
Cotton	21	13	8	6	2	-	-	-	-	X	20
Planting seeds	9	8	10	7	3	-	-	-	-	X	20
Horticultural products	6	6	4	3	2	-	-	X	X	X	60
Fruits and vegetables, fresh	5	5	4	3	2	X	X	X	X	X	100
Fruits and veget., processed	7	6	5	4	3	-	-	X	X	X	60
Tree nuts	12	10	6	4	4	-	-	-	X	X	40
Sugar and tropical products	9	7	6	3	2	-	-	-	X	X	40
Major bulk products	14	9	5	3	2	-	-	X	X	X	60
Total agricultural exports	10	6	5	2	1	-	-	X	X	X	60
Average error & accuracy	15	12	9	6	4	3%	7%	21%	52%	90%	34
Export volume											
Wheat	11	8	9	6	4	-	-	-	-	X	20
Rice	12	11	10	5	3	-	-	-	X	X	40
Coarse grains	11	9	8	5	2	-	-	-	X	X	40
Corn	11	9	8	5	2	-	-	-	X	X	40
Feeds and fodders	10	10	6	5	4	-	-	-	X	X	40
Soybeans	10	9	7	4	2	-	-	-	X	X	40
Soybean meal	12	9	9	6	4	-	-	-	-	X	20
Soybean oil	22	15	12	6	7	-	-	-	-	-	0
Beef and veal	22	23	6	3	0	-	-	-	X	X	40
Pork	12	4	9	2	2	-	X	-	X	X	60
Beef and pork variety meats	18	5	4	1	10	-	X	X	X	-	60
Broiler meat	12	11	9	5	3	-	-	-	X	X	40
Tobacco, unmanufactured	0	0	0	0	0	X	X	X	X	X	100
Cotton	12	9	8	6	3	-	-	-	-	X	20
Major bulk products	5	4	4	3	1	X	X	X	X	X	100
Average error & accuracy	12	9	7	4	3	13%	27%	20%	73%	87%	44

- = Error exceeds 5 percent.

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

Country/region	Average forecast errors Fiscal 2001-12					Forecast accuracy Fiscal 2001-12					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
Export value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					
Asia	16	8	8	4	1	-	-	-	X	X	40
East Asia	16	10	10	4	2	-	-	-	X	X	40
Japan	13	7	6	4	2	-	-	-	X	X	40
China	19	21	18	8	7	-	-	-	-	-	0
Hong Kong	17	10	9	6	2	-	-	-	-	X	20
Taiwan	17	8	7	6	5	-	-	-	-	X	20
South Korea	25	13	12	8	3	-	-	-	-	X	20
Southeast Asia	19	13	9	9	4	-	-	-	-	X	20
Indonesia	27	16	10	6	3	-	-	-	-	X	20
Philippines	24	16	11	8	6	-	-	-	-	-	0
Malaysia	13	5	9	10	5	-	X	-	-	X	40
Thailand	21	17	12	8	5	-	-	-	-	X	20
Vietnam	50	37	13	10	7	-	-	-	-	-	0
South Asia	27	24	22	18	13	-	-	-	-	-	0
India	50	27	5	4	4	-	-	X	X	X	60
Western Hemisphere	11	5	4	2	1	-	X	X	X	X	80
North America	11	5	3	2	1	-	X	X	X	X	80
Canada	9	4	3	1	1	-	X	X	X	X	80
Mexico	14	7	6	3	3	-	-	-	X	X	40
Caribbean	9	9	8	7	4	-	-	-	-	X	20
Dominican Republic	60	33	11	8	6	-	-	-	-	-	0
Central America	11	7	5	6	2	-	-	X	-	X	40
South America	23	11	10	7	5	-	-	-	-	X	20
Brazil	34	24	28	17	9	-	-	-	-	-	0
Colombia	31	17	12	6	4	-	-	-	-	X	20
Peru	75	47	23	0	4	-	-	-	X	X	40
Venezuela	25	19	14	5	7	-	-	-	X	-	20
Europe and Eurasia	18	11	7	5	3	-	-	-	X	X	40
European Union-27	21	11	7	6	4	-	-	-	-	X	20
Other Europe	31	24	26	28	17	-	-	-	-	-	0
FSU-12	18	20	21	13	9	-	-	-	-	-	0
Russia	18	22	22	15	8	-	-	-	-	-	0
Middle East	24	13	9	7	5	-	-	-	-	X	20
Turkey	29	16	14	11	9	-	-	-	-	-	0
Saudi Arabia	19	15	13	8	5	-	-	-	-	X	20
Africa	29	15	9	8	6	-	-	-	-	-	0
North Africa	48	21	13	10	8	-	-	-	-	-	0
Egypt	36	18	16	12	7	-	-	-	-	-	0
Sub-Saharan Africa	14	13	11	10	7	-	-	-	-	-	0
Nigeria	59	33	7	2	1	-	-	-	X	X	40
Oceania	15	14	11	6	3	-	-	-	-	X	20
Transshipments via Canada	53	46	43	32	38	-	-	-	-	-	0
Average error and accuracy	26	17	12	8	6	0%	10%	12%	29%	62%	22

- = Error exceeds 5 percent.

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

Commodity	Average forecast errors Fiscal 2001-12					Forecast accuracy Fiscal 2001-12					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
Import value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Livestock, poultry, and dairy	9	5	5	5	2	-	X	X	X	X	80
Livestock and meats	10	7	6	5	3	-	-	-	X	X	40
Cattle and calves	19	13	14	8	3	-	-	-	-	X	20
Swine	19	15	13	10	7	-	-	-	-	-	0
Beef and veal	12	9	8	8	3	-	-	-	-	X	20
Pork	7	8	10	7	3	-	-	-	-	X	20
Dairy products	11	8	5	6	3	-	-	X	-	X	40
Cheese	11	7	5	2	3	-	-	X	X	X	60
Grains and feed	7	6	4	5	1	-	-	X	X	X	60
Grain products	4	4	4	3	2	X	X	X	X	X	100
Oilseeds and products	18	15	13	8	3	-	-	-	-	X	20
Vegetable oils	17	14	18	17	8	-	-	-	-	-	0
Horticulture products	6	5	4	3	2	-	X	X	X	X	80
Fruits, fresh	9	8	4	3	9	-	-	X	X	-	40
Fruits, preserved	23	18	9	5	2	-	-	-	X	X	40
Fruit juices	18	18	14	7	2	-	-	-	-	X	20
Nuts and preparations	15	12	9	5	2	-	-	-	X	X	40
Vegetables, fresh	5	5	7	2	1	X	X	-	X	X	80
Vegetables, processed	3	2	3	2	4	X	X	X	X	X	100
Wine	6	5	4	3	2	-	X	X	X	X	80
Malt beer	5	4	4	4	3	X	X	X	X	X	100
Essential oils	10	7	6	4	2	-	-	-	X	X	40
Cut flowers and nursery stock	6	4	4	1	1	-	X	X	X	X	80
Sugar and tropical products	9	11	11	7	4	-	-	-	-	X	20
Sweeteners and products	36	35	30	16	15	-	-	-	-	-	0
Confections	106	49	51	47	47	-	-	-	-	-	0
Cocoa and products	11	10	11	5	5	-	-	-	X	X	40
Coffee beans and products	18	17	13	5	4	-	-	-	X	X	40
Natural rubber	26	25	27	20	10	-	-	-	-	-	0
Other imports	6	6	6	3	1	-	-	-	X	X	40
Total agricultural imports	7	5	4	2	2	-	X	X	X	X	80
Average error and accuracy	15	12	11	7	5	13%	29%	39%	61%	81%	45
Import volume											
Wine (HL)	10	8	4	2	2	-	-	X	X	X	60
Malt beer (HL)	8	4	4	4	3	-	X	X	X	X	80
Fruit juices (HL)	10	11	8	5	3	-	-	-	X	X	40
Cattle and calves	10	7	17	11	6	-	-	-	-	-	0
Swine	5	5	3	5	1	X	X	X	X	X	100
Beef and veal	20	19	8	6	4	-	-	-	-	X	33
Pork	4	4	13	13	8	X	X	-	-	-	67
Fruits--fresh	4	4	3	4	1	X	X	X	X	X	100
Fruits--processed	12	7	9	5	5	-	-	-	X	X	40
Vegetables--fresh	3	4	4	3	1	X	X	X	X	X	100
Vegetables--processed	11	10	5	5	1	-	-	X	X	X	60
Vegetable oils	7	6	8	7	3	-	-	-	-	X	20
Cocoa and products	12	11	10	6	6	-	-	-	-	-	0
Coffee beans and products	10	7	7	4	4	-	-	-	X	X	40
Average error and accuracy	9	8	7	6	3	29%	36%	43%	64%	79%	53

- = 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 2001-12					Forecast accuracy Fiscal 2001-12					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
Import value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Western Hemisphere	6	4	3	3	2	-	X	X	X	X	80
Canada	10	6	6	5	3	-	-	-	X	X	40
Mexico	6	6	4	3	2	-	-	X	X	X	60
Central America	5	5	7	4	2	X	X	-	X	X	60
Costa Rica	12	8	7	4	2	-	-	-	X	X	40
Guatemala	7	9	11	10	2	-	-	-	-	X	20
Other Central America	15	6	7	8	6	-	-	-	-	-	0
Caribbean	21	5	11	9	5	-	X	-	-	X	40
South America	5	5	4	4	2	X	X	X	X	X	80
Argentina	21	9	15	13	9	-	-	-	-	-	0
Brazil	7	10	8	7	4	-	-	-	-	X	20
Chile	5	3	7	5	3	X	X	-	X	X	60
Colombia	7	7	5	3	3	-	-	X	X	X	60
Other South America	14	8	5	3	3	-	-	X	X	X	60
Europe and Eurasia	6	6	5	3	2	-	-	X	X	X	60
European Union-27	7	7	5	3	2	-	-	X	X	X	60
Other Europe	16	19	18	16	10	-	-	-	-	-	0
Asia	12	11	9	6	3	-	-	-	-	X	20
East Asia	8	7	5	2	3	-	-	X	X	X	60
China	11	10	6	3	3	-	-	-	X	X	40
Other East Asia	3	7	9	4	4	X	-	-	X	X	40
Southeast Asia	16	14	14	8	5	-	-	-	-	X	20
Indonesia	22	17	17	11	5	-	-	-	-	X	20
Malaysia	27	17	25	24	10	-	-	-	-	-	0
Thailand	14	12	13	10	3	-	-	-	-	X	20
Other Southeast Asia	14	9	9	3	1	-	-	-	X	X	40
South Asia	22	14	17	9	3	-	-	-	-	X	20
India	24	15	14	10	4	-	-	-	-	X	20
Oceania	7	5	7	5	3	-	X	-	X	X	60
Australia	7	7	6	4	4	-	-	-	X	X	40
New Zealand	10	7	9	8	4	-	-	-	-	X	20
Africa	10	12	14	6	7	-	-	-	-	-	0
Sub-Saharan Africa	11	6	21	6	6	-	-	-	-	-	0
Ivory Coast	13	21	24	13	8	-	-	-	-	-	0
Middle East	12	6	11	1	2	-	-	-	X	X	40
Turkey	14	8	14	4	4	-	-	-	X	X	40
Average error & accuracy	12	9	10	7	4	11%	17%	22%	53%	81%	34

- = Error exceeds 5 percent.

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Related Websites

Outlook for U.S. Agricultural Trade

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

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

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

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

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

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

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