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# Outlook for U.S. Agricultural Trade

## FY 2016 Exports Forecast at \$124.5 billion; Imports at a Record \$114.8 Billion

Agricultural exports in FY2016 are forecast at \$124.5 billion, which are \$500 million below the February projection and \$15.2 billion below FY2015 exports. Grain and feed exports are forecast at \$27.7 billion, up \$500 million from the February forecast, primarily due to larger wheat and corn volumes and higher unit values for corn and sorghum. Oilseed and product exports are forecast at \$26.1 billion, up \$700 million in response to stronger soybean and soybean meal export volumes and higher soybean unit values. Cotton exports are forecast at \$3.1 billion, down \$100 million from the February forecast. The forecast for livestock, poultry, and dairy is lowered \$300 million to \$25.4 billion as lower dairy, poultry product, and beef exports are not offset by gains in other livestock products. The forecast for horticultural products is lowered \$1.2 billion to \$33.5 billion. This is the second consecutive quarter-to-quarter downward revision and the total would be the first year-over-year decline since FY2009. This reduction is mainly due to sharply lower unit prices of pistachios and walnuts, as well as reduced almond shipments to the EU and China.

U.S. agricultural imports are forecast at a record \$114.8 billion, down \$3.7 billion from February, mostly from a decline in tropical products. The U.S. agricultural trade surplus is forecast at \$9.7 billion, down from \$25.7 billion in FY2015.

Table 1--U.S. agricultural trade, fiscal years 2010-16, year ending September 30

Item	2010	2011	2012	2013	2014	2015	Forecast fiscal year*	
							2016 Feb.	May
--- Billion dollars ---								
Exports	108.5	137.5	135.9	141.1	152.3	139.7	125.0	124.5
Imports	79.0	94.5	103.4	103.9	109.2	114.0	118.5	114.8
Balance	29.5	43.0	32.5	37.2	43.1	25.7	6.5	9.7

\*Reflects forecasts in the May 10, 2016, *World Agricultural Supply and Demand Estimates* report.

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

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The next release is  
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Approved by the  
World Agricultural  
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## Economic Outlook

### *Slowing dollar appreciation, low oil prices, and growth in EU and Asia underpin export outlook*

World per-capita GDP is expected to grow at 1.5 percent in 2016, slightly faster than the 1.4-percent increase in 2015. Per-capita income growth in the key emerging markets of Brazil, Russia, India, Indonesia, and China was 3.2 percent in 2015, and is expected to increase to 3.4 percent in 2016. This is robust growth, but it is roughly half the 6.3-percent average annual rate of income growth these countries achieved over the previous decade. Global trade volume is expected to grow at 2.0 percent in 2016, exceeding the 2015 growth rate of 1.7 percent.

A challenging external environment, including slower world trade and a strong U.S. dollar, was reflected in weak first quarter U.S. GDP growth. The economy is expected to strengthen in the second half of the year as continued improvements in labor markets and rising wages support consumer spending. Nevertheless, per-capita GDP growth is expected to be 1.3 percent in 2016, falling short of the 1.7-percent growth in 2015.

After a sustained period of appreciation, the dollar weakened significantly against the currencies of its key agricultural trading partners and competitors in the first few months of 2016. In real terms between January and April, the dollar lost 4.7 percent of its value against the euro, 10.3 percent against the Canadian dollar, and 7.3 percent against the yen. It also weakened against key emerging market currencies, particularly those against which it appreciated most strongly over the previous 18 months. Notably, the dollar depreciated 13.5 percent in real terms against both the Russian ruble and the Brazilian real, and lost significant value against other currencies in South America and Southeast Asia.

Recent dollar depreciation reflects a moderation in the underlying conditions that drove its value upward beginning in late 2014. Relatively weak U.S. economic growth observed in the first quarter, and the U.S. Federal Reserve Board's decision to leave interest rates unchanged early in 2016, have lessened the singular attractiveness of dollar assets. In contrast, faster-than-expected growth in China has contributed to rising commodity prices, improving the external environment and supporting stronger currencies in commodity exporters.

Nevertheless, the economic environment remains supportive of a strong dollar. While robust first quarter growth in the Eurozone is expected to taper off in the second half of the year, U.S. economic growth is expected to revive and the Fed is expected to resume interest rate hikes. In addition, while the Chinese economy responded positively to Government stimulus (implemented in February), the structural challenges underlying the slowdown in Chinese growth relative to the past decade persist. February's stimulus did not address the economy's excessive debt and industrial overcapacity. As such, in spite of recent trends, the dollar is expected to appreciate on average in 2016 against most key currencies, although much less than in 2015.

Oil prices fell dramatically in 2015, but have risen in recent months. In addition to unexpected production disruptions from suppliers such as Canada and Nigeria,

crude oil production in the United States has been falling. The result is an average oil price of \$40.75 per barrel for April, up from \$29.78 in January. The U.S. Energy Information Administration forecasts an average price of just over \$40 per barrel for 2016, indicating that recent prices reflect expected energy market conditions in the rest of the year. Expectations for 2016 prices remain low compared to the past 5 years and will continue to provide farmers, manufacturers, fertilizer producers, and farm product exporters a low cost environment in 2016.

Economic recovery in the European Union continues to improve following the debt crisis that began in 2009. Growth in the Eurozone was stronger than expected in the first quarter of 2016, outpacing that of the United States. However, this is not expected to be sustained through 2016. Canadian and Mexican economic growth rates are expected to maintain their 2015 trends in 2016. In Canada, while low oil prices have taken a toll on the economy, looser fiscal policy is expected to benefit sectors outside of energy in the medium term. In Mexico, inflation is lower than in other Latin American countries, supporting consumer spending. However, an external environment characterized by low commodity prices and weak foreign demand has been a drag on commercial trade.

Per-capita income growth in Asia and Oceania is expected to be stable at 3.4 percent in 2016. The Chinese Government's stimulus package was successful in supporting increased property and infrastructure investment, which provided a boost to its own economy and to global commodity prices. Though income growth in China is expected to slow to 6.0 percent in 2016 (the lowest rate since 1990), the downturn would likely be deeper without such interventions. Strong growth in India is expected to continue in 2016 as the pace of economic reform remains supportive of economic expansion. Steady growth is also expected in the rest of South and Southeast Asia, despite medium-term concern about debt levels, inflation, and slowing demand from China.

The Latin American region was in recession in 2015 with per-capita GDP falling 1.5 percent. The region's economy is expected to contract at a similar rate in 2016, largely because of persistent recessions in Brazil, Argentina, and Venezuela. A weak external environment coupled with internal environments characterized by political uncertainty, high inflation, and public and private sector debt concerns in many countries will make it difficult for the region to avoid a period of very low growth and considerably weakened currencies.

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

Region/Country	Real exchange rate 2/		Real GDP per capita		Share of World		Share of U.S.
	2015	2016	2015	2016	GDP	Population	Ag. Exports
	Percent change		Growth rate		2013-15 average		
<b>World</b>	<b>8.5</b>	<b>2.9</b>	<b>1.4</b>	<b>1.5</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>
<b>NAFTA</b>	<b>15.2</b>	<b>8.4</b>	<b>1.5</b>	<b>1.1</b>	<b>26.5</b>	<b>6.7</b>	<b>28.0</b>
United States	--	--	1.7	1.3	22.4	4.5	--
Canada	14.5	6.9	0.4	0.4	2.4	0.5	15.0
Mexico	16.2	10.9	1.3	1.3	1.6	1.7	12.9
<b>Emerging Markets</b>	<b>10.6</b>	<b>5.9</b>	<b>3.2</b>	<b>3.4</b>	<b>21.2</b>	<b>44.9</b>	<b>20.4</b>
Brazil	30.0	11.5	-4.6	-4.7	3.3	2.8	0.9
Russia	37.8	10.4	-3.7	-2.0	2.3	2.0	0.6
India	0.3	0.2	6.0	6.2	3.0	17.4	0.7
Indonesia	6.2	-1.9	3.8	4.1	1.3	3.6	1.8
China	0.6	4.8	6.4	6.0	11.3	19.1	16.3
<b>Europe &amp; Central Asia</b>	<b>7.0</b>	<b>4.8</b>	<b>1.1</b>	<b>1.5</b>	<b>28.7</b>	<b>11.6</b>	<b>9.8</b>
Euro Zone	19.7	4.2	1.3	1.5	17.7	9.0	6.7
Ukraine	23.9	-9.8	-8.8	-1.3	0.2	0.6	0.1
Turkey	17.5	5.4	2.7	2.2	1.2	1.1	1.3
<b>Asia &amp; Oceania</b>	<b>6.4</b>	<b>0.7</b>	<b>3.4</b>	<b>3.4</b>	<b>31.0</b>	<b>55.0</b>	<b>44.4</b>
Japan	13.4	-4.3	0.7	0.7	7.8	1.8	8.5
South Korea	6.8	4.4	2.5	2.5	1.7	0.7	4.3
Australia	18.3	4.6	1.4	1.5	1.8	0.3	1.0
Other SE Asia 3/	7.9	4.3	3.5	3.4	1.5	4.0	5.1
<b>Latin America</b>	<b>11.2</b>	<b>7.5</b>	<b>-1.5</b>	<b>-1.5</b>	<b>8.2</b>	<b>8.6</b>	<b>10.1</b>
Argentina	-1.9	25.7	1.1	-0.6	0.7	0.6	0.1
Other S. America 4/	17.6	9.3	1.8	1.8	3.2	1.6	2.9
<b>Middle East &amp; N. Africa</b>	<b>5.0</b>	<b>2.3</b>	<b>1.2</b>	<b>1.7</b>	<b>5.1</b>	<b>5.1</b>	<b>6.0</b>
<b>Sub-Saharan Africa</b>	<b>10.0</b>	<b>3.0</b>	<b>1.0</b>	<b>1.5</b>	<b>2.2</b>	<b>13.1</b>	<b>1.6</b>

1/ Real values have a 2010 base year.

2/ Local currency per U.S. dollar. A negative growth rate indicates a real depreciation of the dollar. Regional values are growth in GDP-weighted average of country real exchange rate index. World real exchange rate is a U.S. agricultural exports-weighted index.

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

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

Sources: World Bank World Development Indicators, USDA, and the U.S. Census Bureau, U.S. Department of Commerce.

## Export Products

FY2016 grain and feed exports are forecast at \$27.7 billion, up \$500 million from the February forecast primarily due to larger wheat and corn volumes and higher unit values for corn and sorghum. Coarse grain exports are forecast at \$9.4 billion, with corn up \$400 million to \$7.8 billion. The competitiveness of U.S. corn has improved as exports from Brazil have slowed seasonally. Prices have trended higher based on adverse weather in Argentina and Brazil.

Wheat exports are forecast at \$5.1 billion, an increase of \$100 million as slightly higher volumes offset a marginal decrease in unit values. Volume is up primarily as a result of increased opportunities over the summer months as supplies from Argentina and Canada tighten. Prices are pressured lower by abundant global supplies. FY2016 rice exports are unchanged from the February forecast of \$1.8 billion as a rise in volume is offset by lower unit values. Volumes are slightly higher due to shipments to Central America, as expectations of a larger U.S. crop pressure export prices.

Oilseed and product exports are forecast at \$26.1 billion, up \$700 million from the February forecast in response to stronger soybean and soybean meal export volumes and higher soybean unit values. Forecast soybean export value is raised \$700 million to \$17.7 billion. Soybean meal export value is raised \$100 million to \$3.8 billion, offsetting declines in soybean oil and other product export values. Higher purchases of Brazilian soybeans by China have spurred additional U.S. sales to other markets. Recent declines in both Brazil's and Argentina's production forecasts have led to higher U.S. domestic prices, spurring additional farmer sales. These support stronger late-season exports at higher unit values. Meal and oil exports, however, both still face significant competition from Argentina, where the devalued peso continues to support strong product exports.

Cotton exports are forecast at \$3.1 billion, down \$100 million from the February forecast. Export volume is forecast down 100,000 tons to 2.0 million. Weak demand from China has continued to weigh on U.S. export quantity, and demand growth in other markets such as Vietnam has begun to slow. Unit values have trended downward since February, as well.

Livestock, poultry, and dairy exports are reduced \$300 million from February to \$25.4 billion as lower dairy, poultry product, and beef exports are not offset by gains in other livestock products. Dairy products are lowered \$200 million to \$4.7 billion as exports continue to face strong competition in an oversupplied market. Beef exports are reduced by \$200 million to \$5.2 billion on lower unit values. Pork exports are boosted \$100 million to \$4.4 billion on higher quantities and unit values. Poultry exports are lowered \$200 million to \$4.6 billion. Broiler meat, turkey meat, and egg and egg product exports have experienced a slow recovery following the 2015 highly pathogenic avian influenza (HPAI) outbreak.

The forecast for horticultural products is lowered \$1.2 billion to \$33.5 billion. This is the second consecutive quarter-to-quarter downward revision and the total would be the first year-over-year decline since FY2009. Whole and processed tree nuts are cut \$1.0 billion to \$8.0 billion as pistachio and walnut unit values drop sharply and almond shipments to top markets (EU and China) slow more than anticipated. Fresh fruit and vegetables are down just \$100 million to \$7.0 billion on reduced volumes

to Canada and Mexico. Processed fruit and vegetable exports are reduced slightly by \$100 million to \$7.5 billion on lower volumes to Japan, China, and Hong Kong. |

Table 3--U.S. agricultural exports: Value and volume by commodity, 2015-2016

Commodity	October - March		Fiscal year 2015	Forecast Fiscal year 2016	
	2015	2016		Feb.	May
<b>VALUE</b>					
--- Billion dollars ---					
Grains and feeds 1/	14.957	13.053	31.602	27.2	27.7
Wheat 2/	2.845	2.190	5.846	5.0	5.1
Rice	1.065	0.934	2.124	1.8	1.8
Coarse grains 3/	5.215	4.189	11.043	8.9	9.4
Corn	3.998	3.140	8.791	7.4	7.8
Feeds and fodders	3.553	3.594	8.064	6.9	6.9
Oilseeds and products 4/	24.125	19.233	31.701	25.4	26.1
Soybeans	18.386	14.673	21.637	17.0	17.7
Soybean meal 5/	3.185	2.134	5.255	3.7	3.8
Soybean oil	0.501	0.469	0.771	0.9	0.8
Livestock, poultry, and dairy	15.393	12.410	29.290	25.7	25.4
Livestock products	9.472	7.960	18.240	16.0	16.0
Beef and veal 6/	3.068	2.451	5.848	5.4	5.2
Pork 6/	2.520	2.262	4.935	4.3	4.4
Beef and pork variety meats 6/	0.895	0.748	1.595	1.5	1.4
Hides, skins, and furs	1.282	0.945	2.628	2.0	2.0
Poultry and products	3.051	2.164	5.488	4.8	4.6
Broiler meat 6/ 7/	1.856	1.298	3.361	2.8	2.8
Dairy products	2.870	2.286	5.562	4.9	4.7
Tobacco, unmanufactured	0.798	0.726	1.250	1.0	1.0
Cotton	2.219	1.457	4.141	3.2	3.1
Seeds	1.009	0.977	1.572	1.7	1.6
Horticultural products 8/	17.452	16.530	34.107	34.7	33.5
Fruits and vegetables, fresh	3.488	3.193	7.216	7.1	7.0
Fruits and vegetables, processed 8/	3.653	3.639	7.384	7.6	7.5
Tree nuts, whole and processed	5.178	4.415	8.908	9.0	8.0
Sugar and tropical products 9/	3.013	2.939	6.064	6.1	6.1
Major bulk products 10/	30.529	24.168	46.042	36.9	38.1
Total	78.971	67.329	139.741	125.0	124.5
<b>VOLUME</b>					
--- Million metric tons ---					
Wheat 2/	9.667	9.051	21.145	21.7	22.2
Rice	2.047	1.783	4.148	3.4	3.6
Coarse grains 3/	25.524	22.281	56.233	49.9	51.2
Corn	20.388	17.288	46.699	42.0	43.5
Feeds and fodders	8.994	10.521	21.493	18.9	18.8
Soybeans	42.309	40.154	50.401	46.0	47.4
Soybean meal 5/	6.933	5.865	11.929	10.2	10.4
Soybean oil	0.607	0.566	0.914	1.0	1.0
Beef and veal 6/	0.392	0.377	0.775	0.8	0.8
Pork 6/	0.791	0.854	1.651	1.7	1.7
Beef and pork variety meats 6/	0.410	0.367	0.737	0.8	0.7
Broiler meat 6/ 7/	1.547	1.391	2.997	3.0	2.9
Tobacco, unmanufactured	0.108	0.103	0.177	0.1	0.2
Cotton	1.329	0.911	2.519	2.1	2.0
Major bulk products 10/	80.983	74.283	134.622	123.2	126.6

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

## Regional Exports

Agricultural exports in FY2016 are forecast at \$124.5 billion, which is \$500 million below the February projection and \$15.2 billion below FY2015 exports, primarily due to lower exports to **Southeast Asia** and **Africa**.

### *Asia*

The export forecast to **Southeast Asia** is reduced a collective \$500 million, largely as a result of sluggish soybean and soybean meal sales during the first half of the fiscal year. Specifically, **Malaysia** is forecast down \$100 million to \$700 million; **Thailand** is forecast down \$200 million to \$1.4 billion; and **Vietnam** is forecast down \$200 million to \$1.9 billion. In addition to soybeans, reduced demand for tree nuts also contributed to the drop in the exports to Vietnam. With the latest adjustment, Vietnam is no longer the 10<sup>th</sup> largest U.S. market (it was previously tied with the Philippines).

**Hong Kong** is reduced \$100 million to \$3.2 billion on lower-than-expected sales of tree nuts, beef, and poultry.

Exports to **India** are forecast up \$200 million based on higher-than-expected shipments to date.

### *Western Hemisphere*

Exports to the **Caribbean** are forecast down \$100 million as a result of reduced sales to Cuba, where South America, particularly Brazil, has been expanding market share.

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

Exports to **Other Europe** are forecast up \$100 million, primarily as a result of increased shipments of bulk and consumer-oriented products to Switzerland.

Exports to **Saudi Arabia** are forecast up \$100 million based on a strong shipment pace to date.

The export forecast for **North Africa** is down \$200 million, mainly due to reduced bulk shipments to Morocco. Exports to **Sub-Saharan Africa** are also down \$200 million, primarily resulting from lower poultry sales to Angola.

Exports to **Oceania** are down \$200 million, based on reduced consumer-oriented product sales to Australia and New Zealand.



Table 4--U.S. agricultural exports: Value by region, 2015-2016

Country and region 1/	October - March		Fiscal year	Share of	Forecast	
	2015	2016	2015	2015	Fiscal year 2016	
	--- Billion dollars ---			total	Feb.	May
				Percent	--- Billion dollars ---	
Asia	37.331	30.011	60.766	43.5	50.5	49.9
East Asia	30.218	24.077	47.941	34.3	39.3	39.2
Japan	5.915	4.851	11.703	8.4	10.4	10.4
China	16.819	13.214	22.545	16.1	17.5	17.5
Hong Kong	2.398	1.871	3.935	2.8	3.3	3.2
Taiwan	1.777	1.518	3.315	2.4	2.9	2.9
South Korea	3.299	2.619	6.428	4.6	5.2	5.2
Southeast Asia	6.077	4.867	10.664	7.6	9.2	8.7
Indonesia	1.390	1.056	2.443	1.7	1.8	1.8
Philippines	1.305	1.184	2.421	1.7	2.1	2.1
Malaysia	0.472	0.392	0.865	0.6	0.8	0.7
Thailand	1.045	0.838	1.719	1.2	1.6	1.4
Vietnam	1.476	1.041	2.413	1.7	2.1	1.9
South Asia	1.036	1.067	2.160	1.5	2.0	2.2
India	0.492	0.523	1.113	0.8	1.0	1.2
Western Hemisphere	27.326	24.828	53.682	38.4	51.0	50.9
North America	19.799	18.520	39.342	28.2	38.3	38.3
Canada	10.620	9.848	21.337	15.3	20.8	20.8
Mexico	9.179	8.672	18.005	12.9	17.5	17.5
Caribbean	1.777	1.633	3.363	2.4	3.4	3.3
Dominican Republic	0.637	0.542	1.179	0.8	1.0	1.0
Central America	1.932	1.875	3.836	2.7	3.7	3.7
South America	3.818	2.800	7.141	5.1	5.6	5.6
Brazil	0.432	0.280	0.788	0.6	0.5	0.5
Colombia	1.379	1.113	2.595	1.9	2.3	2.3
Peru	0.711	0.514	1.246	0.9	0.8	0.8
Venezuela	0.472	0.188	0.898	0.6	0.4	0.4
Europe/Eurasia	7.852	7.234	13.608	9.7	12.8	12.8
European Union-28 2/	7.116	6.532	12.311	8.8	11.5	11.5
Other Europe 3/	0.324	0.353	0.663	0.5	0.6	0.7
FSU-12 4/	0.413	0.349	0.634	0.5	0.7	0.6
Russia	0.273	0.273	0.406	0.3	0.4	0.4
Middle East	3.438	2.904	5.886	4.2	5.4	5.5
Turkey	1.182	0.793	1.620	1.2	1.2	1.2
Saudi Arabia	0.624	0.635	1.268	0.9	1.2	1.3
Africa	1.964	1.459	3.718	2.7	3.4	3.0
North Africa	0.993	0.682	1.812	1.3	1.6	1.4
Egypt	0.534	0.396	1.044	0.7	0.8	0.8
Sub-Saharan Africa	0.971	0.777	1.906	1.4	1.8	1.6
Nigeria	0.310	0.187	0.675	0.5	0.5	0.5
Oceania	0.199	0.142	2.081	1.5	2.1	1.9
Trans-shipments via Canada 5/	0.000	0.000	0.000	0.0	0.0	0.0
<b>Total</b>	<b>78.971</b>	<b>67.329</b>	<b>139.741</b>	<b>100.0</b>	<b>125.0</b>	<b>124.5</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) and Croatia (which acceded in July 2013).

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

4/ The former 15 Republics of the Soviet Union minus the 3 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 the U.S. Census Bureau, U.S. Department of Commerce.

## Import Products

Agricultural imports in FY2016 are forecast at \$114.8 billion, up \$800 million from the total value in FY2015, but down \$3.7 billion from the February forecast. The expected decreases in total imports compared with the previous projections are largely due to reduced imports of sugar and tropical products, and lower growth expectations for horticultural products.

U.S. imports of sugar and tropical products are forecast to be worth \$23.4 billion in FY2016, a dramatic \$3.5 billion downward adjustment from the previous forecast and \$100 million below FY2015. Tropical products have been adjusted downward since February's outlook as rubber imports are now expected to fall by \$500 million from the previous forecast and \$200 million from FY2015, as lower unit values more than offset steady volumes. Coffee is anticipated to match its FY2015 total, which is a \$900-million drop from the previous forecast as demand is not expected to be as high as previously thought.

Horticultural product imports are expected to increase approximately 7 percent in FY2016, up to \$53.2 billion. However, this is a reduction from the February forecast as fresh and processed fruits are forecast downward by \$200 million and \$300 million, respectively. Fresh fruits, though, would still exceed FY2015 levels by \$900 million, due to both expected higher volumes and unit values. Fresh vegetables are expected to be \$400 million larger than the previous forecast with increased volumes and prices that reflect a greater demand for healthier diets.

Livestock, poultry, and dairy imports are increased \$800 million from the February forecast to \$16.6 billion on stronger volumes and unit values for beef and pork. Live animal and dairy volumes were also raised from last quarter. However, compared to last fiscal year, the forecast is reduced \$2.9 billion on strong declines in livestock and meats. Beef is forecast \$2.0 billion lower to \$5.2 billion on lower volumes. Import demand will be dampened by higher U.S. production and reduced supplies from Australia as they rebuild herds. Live cattle imports are also forecast \$1.0 billion lower than FY2015 to \$1.7 billion on a reduction in volumes and unit values from both Canada and Mexico.

Imports of oilseeds and products are reduced \$200 million from the previous forecast to \$8.8 billion, equaling FY2015 totals. This reduction is largely due to lower volume and unit values for canola seed and oil. The forecast for grain and feed imports remains unchanged at \$11.0 billion, up \$100 million from FY2015 with larger volumes offsetting weak prices. Processed grain products are anticipated to increase \$400 million from FY2015 to \$7.2 billion, accounting for a majority of increased grain imports.

Table 5--U.S. agricultural imports: Value and volume by commodity, fiscal years 2015-2016

Commodity	October - March		Fiscal year 2015	Forecast Fiscal year 2016	
	2015	2016		Feb.	May
<b>VALUE</b>	--- Billion dollars ---				
Livestock, dairy, & poultry	10.021	8.568	19.452	15.8	16.6
Livestock and meats	7.857	6.311	15.151	11.5	12.2
Cattle and calves	1.574	0.976	2.698	1.7	1.7
Swine	0.203	0.180	0.374	0.3	0.3
Beef and veal	3.571	2.569	7.207	5.0	5.2
Pork	0.891	0.883	1.700	1.4	1.7
Dairy products	1.804	1.747	3.488	3.4	3.5
Cheese	0.687	0.699	1.314	1.4	1.4
Grains and feed	5.397	5.467	10.857	11.0	11.0
Grain products	3.326	3.553	6.815	7.2	7.2
Oilseeds and products	4.274	4.021	8.755	9.0	8.8
Vegetable oils	2.544	2.555	5.339	5.6	5.4
Horticulture products	24.814	27.094	49.692	53.9	53.2
Fruits, fresh	5.400	5.948	10.176	11.3	11.1
Fruits, processed	2.460	2.524	5.131	5.6	5.3
Fruit juices	0.959	0.907	1.835	2.0	1.8
Nuts, whole and processed	1.220	1.339	2.581	3.1	2.8
Vegetables, fresh	3.879	4.619	6.877	7.0	7.4
Vegetables, processed	2.211	2.317	4.428	4.6	4.6
Wine	2.630	2.770	5.501	5.8	5.7
Malt beer	1.975	2.252	4.350	4.9	4.9
Essential oils	1.499	1.617	3.345	3.6	3.6
Cut flowers & nursery stock	0.895	0.927	1.724	1.8	1.8
Sugar & tropical products	11.349	10.731	23.520	26.9	23.4
Sweeteners & products	2.212	2.175	4.871	4.9	4.9
Confections	0.785	0.815	1.638	1.8	1.7
Cocoa and products	2.263	2.514	4.701	5.3	5.2
Coffee and products	3.069	2.814	6.393	7.3	6.4
Rubber, natural	0.771	0.629	1.578	1.9	1.4
Other imports 1/	0.953	0.934	1.750	1.9	1.8
<b>Total agricultural imports</b>	<b>56.808</b>	<b>56.817</b>	<b>114.026</b>	<b>118.5</b>	<b>114.8</b>
<b>VOLUME</b>	--- Million metric tons ---				
Wine 2/	0.558	0.609	1.162	1.3	1.2
Malt beer 2/	1.622	1.786	3.545	3.8	3.8
Fruit juices 2/	2.333	2.357	4.511	4.7	4.6
Cattle and calves 3/	1.358	0.978	2.320	1.8	1.8
Swine 3/	2.584	2.995	5.493	6.1	6.1
Beef and veal	0.567	0.473	1.195	0.9	1.0
Pork	0.255	0.262	0.490	0.5	0.5
Fruits, fresh	5.386	5.750	11.157	11.3	11.7
Fruits, processed	0.879	0.916	1.893	2.0	2.0
Vegetables, fresh	3.642	4.023	6.462	6.6	6.8
Vegetables, processed	1.692	1.787	3.432	3.5	3.6
Vegetable oils	2.066	2.322	4.391	4.5	4.7
Cocoa and products	0.623	0.682	1.295	1.4	1.4
Coffee and products	0.691	0.780	1.533	1.7	1.6

Totals may not add due to rounding.

1/ Largely tobacco and planting seeds. 2/ Billion liters. 3/ Million head.

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

## Regional Imports

The Western Hemisphere is revised downward \$1.4 billion to \$63.6 billion, which is an expected increase of \$1.3 billion from FY2015. In North America, imports from Mexico are projected to grow by \$1.8 billion from FY2015, an increase of \$900 million from last quarter's projection, making Mexico the largest supplier of agricultural products in FY2016. This is largely due to a strong expected year across fruit, vegetable, nuts, and other horticultural import markets for Mexico, the largest horticultural supplier to the United States. Canada is expected to be the second-largest supplier as projections have been adjusted downward \$1.2 billion from the previous forecast and \$600 million below last year's total. U.S. imports of Canadian animal products and oilseeds and products have slowed in FY2016 compared to the previous fiscal year.

Imports from South America are forecast down \$700 million, but up \$200 million from FY2015. Chile and Peru, which are the region's top horticultural suppliers, are expected to have an increased value of shipments to the United States this fiscal year. However, top South American suppliers of sugar and tropical products, Brazil and Colombia, are each adjusted downward to values below FY2015.

FY2016 imports from the EU are expected to be \$200 million below the February forecast at \$20.7 billion. Therefore, the EU is expected to remain the third-largest supplier, with about a \$1.0 billion increase over its 2015 total as U.S. imports of wine, beer, and essential oils from the region remain strong.

Imports from Asia are forecast down \$1.5 billion from the previous projection and \$1.0 billion from FY2015. This is partially due to the aforementioned anticipated changes in horticultural and tropical products and the impact they will likely have on the U.S.'s largest suppliers, such as processed fruit from China and rubber from Southeast Asia.

The outlooks for Africa and the Middle East are optimistic, as the Ivory Coast is expected to continue growing as a supplier of cocoa products and Turkey as a supplier of processed fruit.

Table 6--U.S. agricultural imports: Value by region, fiscal years 2015-2016

Region and country	October - March		Fiscal year	Share of	Forecast	
	2015	2016	2015	total	Fiscal year 2016	
	--- Billion dollars ---		Percent		Feb.	May
Western Hemisphere	31.799	32.290	62.268	54.608	65.0	63.6
Canada	11.185	10.487	22.268	19.528	22.9	21.7
Mexico	10.541	11.763	20.633	18.095	21.5	22.4
Central America	2.455	2.361	5.049	4.428	5.4	5.0
Costa Rica	0.726	0.756	1.502	1.317	1.6	1.6
Guatemala	0.975	0.910	1.944	1.705	2.1	1.9
Other Central America	0.754	0.694	1.602	1.405	1.8	1.5
Caribbean	0.242	0.221	0.581	0.510	0.7	0.6
South America	7.375	7.458	13.738	12.048	14.6	13.9
Argentina	0.665	0.751	1.456	1.277	1.5	1.5
Brazil	1.884	1.709	3.534	3.099	3.7	3.4
Chile	1.623	1.800	2.807	2.462	2.9	3.0
Colombia	1.311	1.214	2.472	2.168	2.7	2.4
Peru	0.895	1.035	1.591	1.395	2.2	1.8
Other South America	0.997	0.950	1.878	1.647	1.7	1.8
Europe and Eurasia	10.195	10.775	21.140	18.540	22.5	22.3
European Union-28	9.502	9.964	19.691	17.269	20.9	20.7
Other Europe	0.693	0.811	1.449	1.271	1.5	1.6
Asia	9.057	8.380	18.728	16.424	19.2	17.7
East Asia	2.825	2.848	5.793	5.080	5.8	5.8
China	2.117	2.106	4.330	3.798	4.4	4.3
Other East Asia	0.708	0.742	1.462	1.282	1.5	1.5
Southeast Asia	4.459	4.338	9.663	8.474	9.9	9.4
Indonesia	1.360	1.394	2.914	2.555	2.9	2.9
Malaysia	0.646	0.535	1.246	1.093	1.2	1.0
Thailand	1.035	1.047	2.295	2.013	2.4	2.3
Vietnam	0.804	0.788	1.878	1.647	2.0	1.9
Other Southeast Asia	0.614	0.573	1.330	1.167	1.6	1.3
South Asia	1.774	1.195	3.272	2.870	3.6	2.5
India	1.620	1.049	2.952	2.589	3.3	2.2
Oceania	3.776	3.057	7.767	6.812	8.4	7.3
Australia	2.289	1.777	4.652	4.080	5.0	4.4
New Zealand	1.428	1.221	2.998	2.629	3.3	2.8
Africa	1.250	1.476	2.709	2.376	2.9	3.0
Sub-Saharan Africa	0.998	1.243	2.226	1.952	2.5	2.6
Ivory Coast	0.466	0.607	0.921	0.807	1.0	1.1
Middle East	0.621	0.753	1.160	1.018	1.5	1.3
Turkey	0.398	0.509	0.736	0.645	1.4	0.9
World total	56.808	56.817	114.026	100.0	118.5	114.8

Totals may not add due to rounding.

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

# Reliability Tables

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

Commodity	Average absolute forecast errors Fiscal 2011-15					Forecast accuracy Fiscal 2011-15					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>					<i>Percent</i>
Grains and feeds	16	12	6	3	2	-	-	-	X	X	40
Wheat	20	11	5	4	4	-	-	-	X	X	40
Rice	7	4	8	6	4	-	X	-	-	X	40
Coarse grains	41	32	17	6	2	-	-	-	-	X	20
Corn	40	31	17	7	2	-	-	-	-	X	20
Feeds and fodders	10	12	11	5	2	-	-	-	-	X	20
Oilseeds and products	14	8	6	4	1	-	-	-	X	X	40
Soybeans	13	8	7	5	1	-	-	-	X	X	40
Soybean meal	26	18	14	7	3	-	-	-	-	X	20
Soybean oil	25	22	12	9	3	-	-	-	-	X	20
Livestock, poultry, and dairy	11	10	6	4	1	-	-	-	X	X	40
Livestock products	7	6	4	3	1	-	-	X	X	X	60
Beef and veal	14	12	9	6	3	-	-	-	-	X	20
Pork	8	6	3	2	2	-	-	X	X	X	60
Beef and pork variety meats	8	9	8	7	4	-	-	-	-	X	20
Hides, skins, and furs	11	11	5	4	3	-	-	-	X	X	40
Poultry and products	8	10	7	5	3	-	-	-	-	X	20
Broiler meat	10	11	8	6	3	-	-	-	-	X	20
Dairy products	26	22	17	11	4	-	-	-	-	X	20
Tobacco, unmanufactured	9	7	7	10	5	-	-	-	-	-	0
Cotton	11	11	6	4	2	-	-	-	X	X	40
Planting seeds	10	9	9	9	3	-	-	-	-	X	20
Horticultural products	4	4	3	2	1	X	X	X	X	X	100
Fruits and vegetables, fresh	6	6	5	4	3	-	-	X	X	X	60
Fruits and veget., processed	5	5	4	3	2	X	-	X	X	X	80
Tree nuts	6	7	4	3	2	-	-	X	X	X	60
Sugar and tropical products	11	9	7	4	2	-	-	-	X	X	40
Major bulk products	15	9	5	2	1	-	-	-	X	X	40
Total agricultural exports	7	5	3	1	0	-	-	X	X	X	60
Average error & accuracy	14	11	8	5	2	7%	7%	24%	55%	97%	38
<b>Export volume</b>											
Wheat	9	6	8	6	3	-	-	-	-	X	20
Rice	8	8	8	6	3	-	-	-	-	X	20
Coarse grains	40	32	23	14	9	-	-	-	-	-	0
Corn	32	24	16	7	2	-	-	-	-	X	20
Feeds and fodders	12	13	11	8	6	-	-	-	-	-	0
Soybeans	9	7	7	4	2	-	-	-	X	X	40
Soybean meal	15	11	8	5	2	-	-	-	X	X	40
Soybean oil	25	25	11	10	4	-	-	-	-	X	20
Beef and veal	13	10	6	4	3	-	-	-	X	X	40
Pork	5	5	3	2	2	-	-	X	X	X	60
Beef and pork variety meats	11	11	11	11	5	-	-	-	-	-	0
Broiler meat	6	6	3	3	3	-	-	X	X	X	60
Tobacco, unmanufactured	20	20	15	15	20	-	-	-	-	-	0
Cotton	7	10	9	7	3	-	-	-	-	X	20
Major bulk products	10	9	5	3	2	-	-	-	X	X	40
Average error & accuracy	15	13	10	7	5	0%	0%	13%	40%	73%	25

- = Error exceeds 5 percent.

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

Country/region	Average absolute forecast errors					Forecast accuracy					Forecast accuracy
	Fiscal 2011-15					Fiscal 2011-15					
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	Percent
<b>Export value</b>	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					
Asia	8	7	3	1	1	-	-	X	X	X	60
East Asia	10	9	5	2	2	-	-	-	X	X	40
Japan	10	7	5	4	1	-	-	X	X	X	60
China	17	14	8	8	5	-	-	-	-	X	20
Hong Kong	12	8	5	5	6	-	-	X	X	-	40
Taiwan	9	8	8	6	7	-	-	-	-	-	0
South Korea	17	15	14	10	3	-	-	-	-	X	20
Southeast Asia	11	7	5	2	3	-	-	X	X	X	60
Indonesia	22	15	10	5	2	-	-	-	-	X	20
Philippines	12	10	7	4	2	-	-	-	X	X	40
Malaysia	13	11	6	6	10	-	-	-	-	-	0
Thailand	21	18	13	5	6	-	-	-	-	-	0
Vietnam	9	8	6	9	12	-	-	-	-	-	0
South Asia	23	23	23	19	15	-	-	-	-	-	0
India	7	7	7	13	12	-	-	-	-	-	0
Western Hemisphere	5	4	2	2	1	-	X	X	X	X	80
North America	6	4	3	2	1	-	X	X	X	X	80
Canada	4	3	2	1	1	X	X	X	X	X	100
Mexico	9	7	5	3	2	-	-	X	X	X	60
Caribbean	4	4	4	7	2	X	X	X	-	X	80
Dominican Republic	14	14	10	7	7	-	-	-	-	-	0
Central America	16	14	13	6	5	-	-	-	-	X	20
South America	17	16	12	8	5	-	-	-	-	X	20
Brazil	35	36	29	26	9	-	-	-	-	-	0
Colombia	35	33	22	10	3	-	-	-	-	X	20
Peru	27	25	19	13	17	-	-	-	-	-	0
Venezuela	18	18	16	11	5	-	-	-	-	-	0
Europe and Eurasia	12	11	7	5	3	-	-	-	X	X	40
European Union-27	15	14	9	5	3	-	-	-	-	X	20
Other Europe	19	19	19	20	10	-	-	-	-	-	0
FSU-12	10	10	9	9	6	-	-	-	-	-	0
Russia	14	14	12	12	3	-	-	-	-	X	20
Middle East	17	11	9	6	4	-	-	-	-	X	20
Turkey	22	14	12	13	13	-	-	-	-	-	0
Saudi Arabia	14	15	15	6	6	-	-	-	-	-	0
Africa	30	23	13	10	6	-	-	-	-	-	0
North Africa	40	31	18	16	10	-	-	-	-	-	0
Egypt	40	30	17	13	9	-	-	-	-	-	0
Sub-Saharan Africa	19	18	12	9	6	-	-	-	-	-	0
Nigeria	11	5	3	3	7	-	-	X	X	-	40
Oceania	25	12	11	11	5	-	-	-	-	-	0
Average error and accuracy	17	14	10	8	6	5%	10%	24%	29%	49%	23

- = Error exceeds 5 percent.

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

Commodity	Average absolute forecast errors Fiscal 2011-15					Forecast accuracy Fiscal 2011-15					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, poultry, and dairy	8	7	5	4	2	-	-	X	X	X	60
Livestock and meats	8	7	5	5	2	-	-	X	X	X	60
Cattle and calves	17	11	8	6	4	-	-	-	-	X	20
Swine	17	17	14	9	9	-	-	-	-	-	0
Beef and veal	13	15	11	8	4	-	-	-	-	X	20
Pork	10	5	6	9	3	-	-	-	-	X	20
Dairy products	6	7	1	3	2	-	-	X	X	X	60
Cheese	7	4	6	7	4	-	X	-	-	X	40
Grains and feed	3	5	5	2	1	X	-	X	X	X	80
Grain products	3	1	3	2	2	X	X	X	X	X	100
Oilseeds and products	13	13	11	5	2	-	-	-	X	X	40
Vegetable oils	14	12	6	3	4	-	-	-	X	X	40
Horticulture products	4	2	3	3	1	X	X	X	X	X	100
Fruits, fresh	4	3	1	5	1	X	X	X	-	X	80
Fruits, preserved	12	12	9	6	2	-	-	-	-	X	20
Fruit juices	23	18	12	9	5	-	-	-	-	-	0
Nuts and preparations	17	11	9	6	6	-	-	-	-	-	0
Vegetables, fresh	4	5	7	3	2	X	X	-	X	X	80
Vegetables, processed	10	8	8	6	5	-	-	-	-	-	0
Wine	4	4	6	3	1	X	X	-	X	X	80
Malt beer	5	6	3	3	3	-	-	X	X	X	60
Essential oils	6	3	3	3	4	-	X	X	X	X	80
Cut flowers and nursery stock	4	4	4	2	2	X	X	X	X	X	100
Sugar and tropical products	20	16	13	6	2	-	-	-	-	X	20
Sweeteners and products	18	11	8	6	4	-	-	-	-	X	20
Confections	10	7	5	3	4	-	-	X	X	X	60
Cocoa and products	10	10	10	8	5	-	-	-	-	X	20
Coffee beans and products	23	18	16	9	4	-	-	-	-	X	20
Natural rubber	56	48	36	16	8	-	-	-	-	-	0
Other imports	19	23	19	9	4	-	-	-	-	X	20
Total agricultural imports	7	6	5	3	1	-	-	X	X	X	60
Average error and accuracy	12	10	8	6	3	23%	26%	39%	48%	84%	44
<b>Import volume</b>											
Wine (HL)	12	11	7	4	2	-	-	-	X	X	40
Malt beer (HL)	4	3	3	4	3	X	X	X	X	X	100
Fruit juices (HL)	13	14	8	3	2	-	-	-	X	X	40
Cattle and calves	7	7	6	9	2	-	-	-	-	X	20
Swine	7	5	4	3	1	-	X	X	X	X	80
Beef and veal	18	19	12	7	4	-	-	-	-	X	20
Pork	14	12	11	14	7	-	-	-	-	-	0
Fruits--fresh	3	3	1	2	1	X	X	X	X	X	100
Fruits--processed	9	9	8	8	5	-	-	-	-	X	20
Vegetables--fresh	2	3	2	2	2	X	X	X	X	X	100
Vegetables--processed	14	13	11	11	11	-	-	-	-	-	0
Vegetable oils	5	3	3	5	2	X	X	X	-	X	80
Cocoa and products	9	7	6	8	3	-	-	-	-	X	20
Coffee beans and products	6	7	6	4	2	-	-	-	X	X	40
Average error and accuracy	9	8	6	6	3	29%	36%	36%	50%	86%	47

- = Error exceeds 5 percent. HL = hectoliters.



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

Country/region	Average absolute forecast errors Fiscal 2011-15					Forecast accuracy Fiscal 2011-15					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	1	-	X	X	X	X	80
Canada	6	3	3	3	2	-	X	X	X	X	80
Mexico	6	5	2	4	1	-	X	X	X	X	80
Central America	11	9	12	7	2	-	-	-	-	X	20
Costa Rica	11	7	7	6	3	-	-	-	-	X	20
Guatemala	10	10	12	7	4	-	-	-	-	X	20
Other Central America	13	15	20	8	5	-	-	-	-	-	0
Caribbean	14	16	14	11	6	-	-	-	-	-	0
South America	8	6	6	5	3	-	-	-	X	X	40
Argentina	16	13	11	8	4	-	-	-	-	X	20
Brazil	13	11	10	12	5	-	-	-	-	-	0
Chile	5	4	4	4	2	-	X	X	X	X	80
Colombia	12	11	9	6	3	-	-	-	-	X	20
Other South America	56	53	36	37	37	-	-	-	-	-	0
Europe and Eurasia	3	2	2	2	1	X	X	X	X	X	100
European Union-27	3	3	2	1	1	X	X	X	X	X	100
Other Europe	8	4	5	9	4	-	X	-	-	X	40
Asia	17	14	11	5	2	-	-	-	X	X	40
East Asia	9	8	5	4	2	-	-	-	X	X	40
China	10	9	6	4	2	-	-	-	X	X	40
Other East Asia	4	4	4	4	2	X	X	X	X	X	100
Southeast Asia	20	17	12	6	2	-	-	-	-	X	20
Indonesia	24	19	14	8	3	-	-	-	-	X	20
Malaysia	34	30	21	12	5	-	-	-	-	X	20
Thailand	17	16	11	8	2	-	-	-	-	X	20
Other Southeast Asia	93	91	70	56	56	-	-	-	-	-	0
South Asia	39	36	42	19	7	-	-	-	-	-	0
India	42	38	39	20	8	-	-	-	-	-	0
Oceania	11	10	18	10	6	-	-	-	-	-	0
Australia	11	12	21	10	7	-	-	-	-	-	0
New Zealand	10	7	16	11	4	-	-	-	-	X	20
Africa	14	12	13	12	5	-	-	-	-	X	20
Sub-Saharan Africa	17	16	14	10	5	-	-	-	-	-	0
Ivory Coast	21	30	39	22	10	-	-	-	-	-	0
Middle East	11	10	20	5	4	-	-	-	-	X	20
Turkey	13	9	18	9	7	-	-	-	-	-	0
Average error & accuracy	17	16	15	10	6	8%	22%	19%	31%	67%	29

- = Error exceeds 5 percent.

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### Related Websites

Outlook for U.S. Agricultural Trade

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

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

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

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

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

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

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