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Wheat Outlook

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Sharply Higher Supplies Raise 2010/11 Ending Stocks

Contents

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Approved by the World Agricultural Outlook Board.

U.S. wheat supplies for 2010/11 are raised this month on higher area, yields, and carryin. Beginning stocks are raised 43 million bushels based on the June 1 stocks' estimate. Total wheat production is forecast 149 million bushels higher with higher forecast area and a forecast record yield of 45.9 bushels per acre. Winter wheat production is up 23 million bushels as higher hard red winter wheat yields more than offset lower yields for soft red winter wheat. Durum and other spring wheat production is forecast higher as abundant moisture and lack of heat stress in the Northern Plains support above-trend yields. Feed and residual use is projected 20 million bushels lower as higher prices limit the competitiveness of wheat in livestock and poultry rations. Exports are projected 100 million bushels higher with lower expected production in several major exporting countries and strong early-season export sales. Despite increased foreign demand for U.S. wheat, ending stocks for 2010/11 are projected 102 million bushels higher and remain at an expected 23-year high. The season-average farm price for all wheat is projected at $4.20 to $5.00 per bushel, up 20 cents on each end of the range as tighter world supplies and higher corn prices support wheat values.

This month's 2009/10 changes reflect the latest export and seed use data and reported June 1 stocks. Projected exports are lowered 20 million bushels and estimated seed use is lowered 3 million bushels. Based on these changes, June 1 stocks indicate feed and residual use to be 21 million bushels lower. The 2009/10 wheat farm price is estimated at $4.87 per bushel, up 2 cents from last month's projection.

World wheat production for 2010/11 is projected to decline this month 7.5 million tons following an 11.5-million-ton projected drop in foreign production that more than offsets a 4.0-million-ton increase in U.S. wheat output. FSU-12 is dominant in this decline, as wheat production in this region is projected down 7.5 million tons–4.5 million tons for Russia and 3.0 million tons for Kazakhstan due to drought conditions in the two countries' spring wheat belts. Canadian wheat production is cut by 4.0 million tons to 20.5 million this month, which is 236 percent lower than Canada's 2009 wheat output. The decrease is entirely based on a 1.5-million-hectare reduction in sown area, down to 7.7 million hectares. Wheat production in the EU-27 for 2010/11 is projected down 1.1 million tons this month to 141.8 million. Indian wheat production is reduced 1.0 million tons to 79.0 million, and in Turkey wheat production prospects are down 0.5 million tons to 17.0 million. Foreign wheat supplies are projected 12.3 million tons lower than last month, but still 0.9 million tons higher than in the previous year. Projected 2010/11 world ending stocks are down 6.9 million tons this month to 187.0 million, while foreign ending stocks decline almost 6 percent, or 9.7 million tons, to 157.3 million, as U.S. stocks increase 2.8 million tons. U.S. export prospects are boosted due to increased supplies and reduced competition.

Domestic Situation and Outlook

Forecast 2010 Production Is Unchanged From 2009

All wheat 2010 production is forecast at 2,216 million bushels, up 149 million bushels from the June, but unchanged from 2009. All wheat harvested area is forecast at 48.3 million acres, down 1.6 million acres from last year. The U.S. all wheat forecast yield is 45.9 bushels per acre, up 2.0 bushels from June and up 1.5 bushels from 2009. The 2010 yield is up 1.0 bushels from the previous record high of 44.9 bushels per acre in 2008.

Winter Wheat Forecasts by Class

Hard red winter wheat (HRW) production is forecast at 1,011 million bushels, up 32 million bushels from June and up 92 million from a year ago. HRW production is forecast up from 2009 despite a 3.2-million-acre drop in planted area because of both a lower abandonment rate and a higher yield than in 2009. In 2009, Texas and Oklahoma harvested areas and yields were adversely impacted by dry conditions and a spring freeze. Despite large decreases in planted acres in 2010, harvested acres in Oklahoma and Texas are up 400,000 and 1.1 million acres, respectively, as both States have experienced more favorable growing conditions than a year ago. Nationally, forecast planted area, harvested area, yield, and year-to-year changes for 2010, respectively, are 28.5 million acres, down 3.2 million acres; 24.0 million acres, down 0.1 million acres; and 42.2 bushels per acre, up 4.1 bushels per acre. The forecasted harvested-to-planted ratio for HRW for 2010 is .84 compared with .76 for 2009.

Soft red winter wheat (SRW) production is forecast at 268 million bushels, down 16 million bushels from June and down 136 million bushels from last year. SRW production is forecast to fall from 2009 with lower harvested area and yield. In the fall of 2009, a rain-delayed row-crop harvest and low prices reduced SRW seedings. Forecast planted area, harvested area, and yield and year-to-year changes for 2010 from 2009 are 5.8 million acres, down 2.5 million acres; 4.8 million acres, down 2.4 million acres; and 55.5 bushels per acre, down 0.6 bushels per acre, respectively. Yield forecasts are down from last month in most SRW States. The largest declines were in North Carolina and Virginia, both down 9 bushels, due to extreme heat and dry weather.

White winter wheat production is forecast to total 226 million bushels, up 7 million bushels from June and up 26 million bushels from a year ago. Of the white winter production total, 18 million bushels are **hard white winter** (HWW) and 208 million bushels are **soft white winter** (SWW). The HWW 2010 planted and harvested areas are 330,000 acres and 291,000 acres, respectively. The previous year, the HWW harvested and planted areas are 248,000 million acres and 304,000 acres, respectively. HWW 2010 yield is 61.2 bushels per acre compared to 59.6 bushels in 2009. The SWW 2010 planted and harvested areas are 3.1 million acres and 3.0 million acres, respectively. The previous year, the SWW harvested and planted areas were 3.0 million acres and 2.9 million acres, respectively. SWW 2010 yield is 69.6 bushels per acre compared to 63.8 bushels in 2009.

Spring Wheat Forecasts by Class

Hard red spring (HRS) production is forecast at 567 million bushels, up 19 million bushels from 2009. HRS production is forecast up as higher harvested area more than offsets a lower yield. Forecast planted area, harvested area, yield, and year-to-year changes for 2010, respectively, are 13.3 million acres, down 0.7 million acres; 13.0 million acres, down 0.7 million acres; and 43.7 bushels per acre, down 0.8 bushels per acre.

White spring production is forecast to total 40 million bushels up 3 million bushels from a year ago. Of the white spring production total, 8 million bushels are **hard white spring** (HWS) and 32 million bushels are **soft white spring** (SWW). The HWS 2010 planted and harvested areas are 104,000 acres and 101,000 acres, respectively. The previous year, the HWS harvested and planted areas are 104,000 acres and 100,000 acres, respectively. HWS 2010 yield is 79.1 bushels per acre compared to 78.7 bushels in 2009. The SWS 2010 planted and harvested areas are 544,000 acres and 528,000 acres, respectively. The previous year, the SWS harvested and planted areas are 550,000 acres and 537,000 acres, respectively. SWS 2010 yield is 60.1 bushels per acre compared to 53.3 bushels in 2009.

Durum wheat production is forecast to total 104 million bushels, down 5 million bushels from a year ago. Production is down as lower yield more than offset a higher harvested area. Forecast planted area, harvested area, yield, and year-to-year changes for 2010, respectively, are 2.7 million acres, up 121,000 acres; 2.6 million acres, up 160,000 acres; and 40.0 bushels per acre, down 4.9 bushels per acre. Notably, if this yield is realized, it will still be the second-highest yield ever, trailing only last year.

Hard and Soft White Wheat Area and Production Forecasts

All white wheat production for 2010 is 266 million bushels, up 29 million bushels from 2009. All white wheat planted and harvested areas for 2010, at 4.1 million acres and 3.9 million acres, respectively, are both up from 2009. All white wheat yield for 2010 is 67.9 bushels per acre, up 5.5 bushels from 2009.

The all soft white planted area for 2010, at 3.6 million acres, is nearly the same as in 2009. The all hard white wheat planted area is 434,000 acres, down from 452,000 acres in 2009. The all soft white harvested area for 2010, at 3.5 million acres, is up 0.1 million acres from 2009. The all hard white wheat harvested area is 392,000 acres, down from 404,000 acres in 2009. The all hard white wheat yield for 2010 is 65.8 bushels per acre, up 1.5 bushels from 2009. The all soft white wheat yield for 2010 is 68.2 bushels per acre, up 6.1 bushels from 2009.

2010/11 Ending Stocks Up From June

Projected ***ending stocks*** for 2010/11, at 1,093 million bushels, are up 102 million bushels from June. The 182-million-bushel increase in supplies more than offset the 80-million-bushel increase in total use, raising ending stocks month to month. Projected **supplies** for 2010/11, at 3,289 million bushels, are up month to month because the higher projected carryin stocks, up 43 million bushels, and the higher forecast production, up 149 million bushels, far exceed a projected 10-million drop in imports.

Supplies for 2010 are up 301 million bushels from 2009/10. With production unchanged year to year, supplies are up from 2009/10 because the larger projected carryin stocks, up 316 million bushels, more than offsets slightly lower projected imports, down 15 million bushels.

Projected **domestic use** for 2010/11 is down 20 million bushels from June, but up 47 million bushels from 2009/2010. **Food use** for 2010/11 is projected at 940 million bushels, unchanged from June, but up 20 million from the 2009/10. The higher year-to-year food use reflects (1) an expected decrease in average flour extraction rate from the extraordinarily high rate for 2009/10, (2) population growth, and (3) constant per capita flour consumption year to year. **Feed and residual use** is projected at 180 million bushels, down 20 million bushels from June, as higher prices limit the competitiveness of wheat in livestock and poultry rations. Projected feed and residual use for 2010/11 is 21 million bushels above feed and residual use for 2009/10. **Exports** are projected at 1,000 million bushels, up 100 million bushels from June and up 135 million bushels from 2009/10, because of lower expected production in several major exporting countries and strong early season export sales. Thus, **ending stocks** for 2010/11 are projected at 1,093 million bushels, up 102 million bushels from June and up 120 million bushels from 2009/10. These are the highest ending stocks since 1987/88.

The 2010/11 **farm price range** is projected at $4.20 to $5.00 per bushel, up 20 cents on each end of the range from June as tighter world supplies and higher corn prices support wheat values. This compares with $4.87 for the previous year and the record high of $6.78 for 2008/09.

2010/11 Year-to-Year By-Class Comparisons

Projected supplies of all classes except SRW are up year to year for 2010/11. SRW supplies are down, mostly because of a large year-to-year production drop. The hard wheats, HRW and HRS, have the largest year-to-year increases in 2010 supplies with their combined larger carryin stocks and higher production.

Projected 2010/11 carryin stocks of all classes are up year to year, with HRW's 131-million-bushel increase leading the other classes. Projected all wheat imports are down year to year, mostly because of lower SRW imports, down 12 million bushels. Forecast production of SRW and durum are down year to year, especially SRW, down 136 million bushels. Production of the other three classes are up year to year, with HRW up the most with its 92-million-bushel increase.

Projected changes in domestic use vary by class of wheat. Domestic use is up year to year for HRW and white, but down for the other three classes. Projected exports are higher for all classes of wheat with HRW exports up the most year to year.

Projected ending stocks for 2010 are up year to year for HRW, HRS, and white, but down for SRW and durum. The year-to-year percentage increase in all-wheat ending stocks is 12 percent. HRW and HRS projected ending stocks are up the most, 24 percent and 42 percent, respectively, while white ending stocks are up 11 percent. The projected ending stocks of SRW and durum are down by 33 percent and 1 percent, respectively.

2010 Spring Wheat Conditions Better Than Last Year

USDA's National Agricultural Statistics Service (NASS) reported in the July 6 *Crop Progress* reported that as of July 4, 83 percent of the 2010 spring wheat was rated good to excellent and only 2 percent was rated poor to very poor. A year ago at this time, 72 percent of the spring wheat crop was rated good to excellent and 8 percent was rated poor to very poor.

Supply and Use Changes for 2009/10

Total supplies for 2009/10, at 2,988 million bushels, are unchanged from June. Supplies for 2009/10 are up 56 million bushels from the previous year as much higher beginning stocks more than offset lower production and projected imports.

Total projected use for 2009/10, at 2,014 million bushels, is down 44 million bushels from June because of lower projected exports and feed and residual use. Total use for 2009/10 is down 261 million bushels from the previous year because of both lower domestic use and lower exports.

Projected **food use**, at 920 million bushels, is unchanged from June, but down 7 million bushels year to year. The flour extraction rate for 2009/10 remains at the very high level of the 2008/09 marketing year, but per capita flour consumption is expected to be down significantly year to year. The expected lower per capita consumption more than offsets the larger U.S. population. Ten million bushels are shifted from HRW food use to HRS as part of the domestic use analysis based on the NASS June 30 *Grains Stocks* report.

Projected **seed use** is down slightly from June to 70 million bushels. Seed use is low because of the smallest winter wheat plantings since 1970. Seedings were down as rain-delayed row crop harvesting preventing plantings and prices were lower year to year at planting time.

Total projected **feed and residual use**, at 159 million bushels, is down 21 million bushels from June based on the NASS June 30 *Grains Stocks* report.

The projected 2009/10 exports are down 398 million bushels from the recent high in 2007/08. Exports in 2007/08 were a 15-year high as adverse weather around the world reduced global production and increased the demand for U.S. wheat. Farmers around the world responded to the high prices that resulted from the tight global stocks-to-use situation in 2007/08, and the resulting additional foreign supplies have steadily reduced the demand for relatively higher priced U.S. wheat.

The **by-class export changes** from June based on the export pace to date and projected changes with U.S. export competitors. Projected exports of HRW, HRS, SRW, and white are lowered, with the largest a 10-million-bushel decrease for HRW.

Projected **ending stocks** for 2009/10, at 973 million bushels, are up 43 million bushels from June. Ending stocks for 2009/10 are 316 million bushels above 2008/09 and 667 million bushels above 2007/08. Ending stocks for 2007/08 were the lowest since the late 1940s. The projected 2009/10 ending stocks are the highest since 1987/88. The month-to-month changes resulted in higher projected ending stocks for HRW, SRW, and white wheat. Ending stocks for HRS and durum are down from June.

The year-to-year percentage increase in projected all-wheat ending stocks is 48 percent. Projected ending stock increases year-to-year for HRW, HRS, SRW, white, and durum are 51 percent, 65 percent, 41 percent, 23 percent, and 38 percent, respectively.

The marketing-year **average farm price** is $4.87 per bushel, up $.02 from June.

USDA Wheat Baseline, 2010-19

Each year, USDA updates its 10-year projections of supply and utilization for major field crops grown in the United States, including wheat. A detailed discussion summarizing the historical forces determining U.S. wheat supply and utilization and the analysis underlying the wheat projections for 2010-19 is available at www.ers.usda.gov/briefing/wheat/2010baseline.htm.

International Situation and Outlook

Wheat Production Down This Month; FSU-12 Dominant In the Decline

World wheat production for 2010/11 is projected to decline this month by 7.5 million tons following an 11.5-million-ton projected drop in foreign production that more than offset a 4.0-million-ton increase in U.S. wheat output. Foreign wheat production projected for 2010/11 is reduced this month to 600.8 million tons, leaving foreign wheat production 18.8 million tons lower than estimated for the previous year. Foreign wheat area is projected 2.8 million hectares below last year at down to 202.6 million, following a 1.9-million-hectare reduction taken this month, while average yield is down 2.0 percent year to year, and 1.0 percent this month. Reductions in production are taken for Russia, Canada, Kazakhstan, EU-27, India, and Turkey. Those reductions are partly offset by higher projected output in the U.S. and China. The main wheat area reductions are made for Canada and Russia reflecting adverse weather conditions during planting season.

The biggest drop in wheat production prospects for 2010/11 this month occurred in Russia, where the month-to-month decrease reached 4.5 million tons, lowering output to 53 million. In Kazakhstan, wheat production is estimated 3.0 million tons lower this month, with wheat output down to 14.0 million, which takes total FSU-12 wheat production down 7.5 million tons. Dryness started to develop back in April, with prolonged low precipitation and high temperatures across the entire spring wheat belt in the FSU-12 that runs from central western Russia east across the Ural Mountains and into Siberia, including northern and central Kazakhstan. The drought intensified in June when precipitation often did not reach even 10 millimeters (0.4 inches), less than 20 percent of normal. The Central, Volga, and Ural districts are currently experiencing the driest conditions on record for an April-July stretch. In western and central Kazakhstan, the dryness is the second-worst on record after a disastrous 1991, when production was less than 7 million tons with a 0.5 tons per hectare yield. Extreme dryness has been accompanied by high temperatures over 30 degrees C, and sometimes over 35, which stressed, and in some cases, damaged the crop. A number of regions (such as Orenburg, Saratov—where more than 50 percent of the grain fields are affected—Bashkiria, Tatarstan, Samara, Ulyanovsk, Penza among them) have declared a state of emergency, and the list is growing. At the same time, winter wheat in Russia's most important wheat-growing regions—southern European Russia and the north Caucasus—is doing substantially better than last year. Higher yields of winter wheat are expected, and despite high winterkill that happened mainly in the Central and Volga districts (16 percent versus 4 percent last year, that leads to this month's area reduction of 0.6 million hectares), winter wheat production is projected to partly counterbalance anticipated losses in spring wheat.

Canadian 2010/11 wheat production is cut by 4.0 million tons to 20.5 million this month, which is 23 percent lower year to year. The decrease is entirely based on a 1.5-million-hectare reduction in sown area, down to 7.7 million hectares. Extremely wet conditions in the Prairies, especially in Saskatchewan that produces half of Canada's wheat and in Manitoba that accounts for 15 percent of the country's wheat production, impeded sowing, and provincial reports indicate a high percentage of unseeded areas (30 and percent, respectively). The level of wetness in Saskatchewan is similar to the extreme level of 2007, the rainiest season since 1993. Federal and provincial government; programs offer Canadian farmers in affected regions the option of collecting insurance payments rather than planting wheat. This year, the farmers in Saskatchewan, Alberta, and Manitoba also will be eligible to collect C$30 per acre from the AgriRecovery disaster program.

Wheat production in the EU-27 for 2010/11 is projected down 1.1 million tons this month to 141.8 million. This reflects the higher-than-previously-anticipated impact on crop yield potential of dryness in western Europe that spread from the UK east to Germany (one of the consequences of the dryness being premature ripening with smaller kernels), as reported by government agencies. Lingering wetness in Eastern Europe also continues to impact the wheat crop. Wheat production was reduced for France, Spain, Hungary, Romania, Austria, and Portugal. Several small partly offsetting upward adjustments were taken for a number of other EU-27 countries.

Indian wheat production is reduced 1.0 million tons to 79.0 million this month, 1.7 million tons lower than last year. Wheat yield was affected by an intense heat wave over northern, northwestern, and central India in March and April while the crop was already in maturity stage, and the shortened ripening time resulted in smaller grain size. In Turkey, wheat production prospects are down another 0.5 million tons to 17.0 million this month. This reduction in yields and production, because of the outbreak of yellow rust in Turkey's southern and southeastern provinces, is based on early harvest reports that indicated lower-than-expected yields.

This month's reduction in foreign wheat production is partly offset by an increase in production prospects in China. Chinese wheat production is projected 2.5 million tons higher this month, reaching 114.5 million, just 0.5 million lower than previously forecast. The increase is based on data from Chinese provinces indicating higher estimated wheat area, and on a higher yield forecast following excellent late-season weather. Small increases in wheat production for 2010/11 are made for Serbia and Croatia, by 0.1 and 0.05 million tons, respectively.

An almost 2-percent reduction in projected 2010/11 foreign wheat output this month is exacerbated by a reduction in beginning stocks. Foreign wheat supplies are projected 12.3 million tons lower than last month, but still 0.9 million tons higher than in the previous year. Foreign beginning stocks for 2010/11 are down 1.0 million tons to 166.5 million due to the following 2009/10 changes: a 0.5-million-ton increase in 2009/10 Canadian wheat exports; a 2009/10 revision of EU-27 wheat output down 0.7 million tons, coupled with a 0.5-million-ton decline in EU-27 imports; and higher 2009/10 food use in both Mexico and Nigeria.

Foreign Wheat Consumption Unchanged; Ending Stocks Six Percent Down

Projected foreign wheat consumption in 2010/11 is up insignificantly by 0.1 million tons. Foreign feed use for 2010/11 is unchanged this month, with the adjustments in individual countries completely offsetting. In Russia, the amount of wheat for feed use is increased by 2.0 million tons to 24.0 million, despite this month's reduction in wheat output. Several factors contributed to this change: Russian livestock numbers continue to expand substantially (e.g., poultry numbers are projected to grow by 11 percent); lower corn supplies and higher corn prices reduced corn feeding; and government intervention stocks consist mainly of feed quality wheat, while the Russian Government is under pressure to reduce storage costs and is determined to reduce the size of those stocks. Wheat feeding is increased in China by 1.0 million tons, reflecting higher use of low quality wheat from government reserves. Wheat feed use is slightly increased in Iraq. Wheat feeding is reduced in Canada by 1.5 million tons to 2.0 million, following wheat production reduction and sluggish livestock-sector development. Wheat feeding is also reduced in EU-27 by 1.0 million tons, in Ukraine by 0.5 million tons, and in Kazakhstan by 0.2 million tons.

Projected foreign food use is increased by a mere 0.1 million tons following slightly higher 2009/10 wheat imports and food consumption in Mexico.

Projected 2010/11 world wheat ending stocks are down 6.9 million tons this month to 187.0 million, while foreign ending stocks declined almost 6 percent, or 9.7 million tons, to 157.3 million; U.S. stocks are projected to increase 2.8 million tons. Russia's wheat ending stocks are down 4.0 million tons to 3.8 million, due to a combination of lower production and exports with increased consumption of feed mentioned above. In the EU-27, ending stocks are forecast down 2.2 million tons this month to 13.9 million, as a result of lower beginning stocks and production and higher exports prospects; in Kazakhstan and India, ending stocks are projected down 2.3 and 1.0 million tons to 2.3 and15.0 million, respectively, reflecting lower projected wheat production; in Canada, ending stocks are reduced by 1.0 million tons to 4.7 million following downward revisions of production, exports, and consumption; and Australia's 2010/11 ending stocks are down 1.0 million tons to 3.9 million due to higher export prospects. Ending stocks are also lowered for Iraq and Mexico. Ending stocks are up 2.0 million tons for China as a result of both higher beginning stocks and production, and despite some increase in feed use. Small increases in ending stocks are made for Croatia and Serbia.

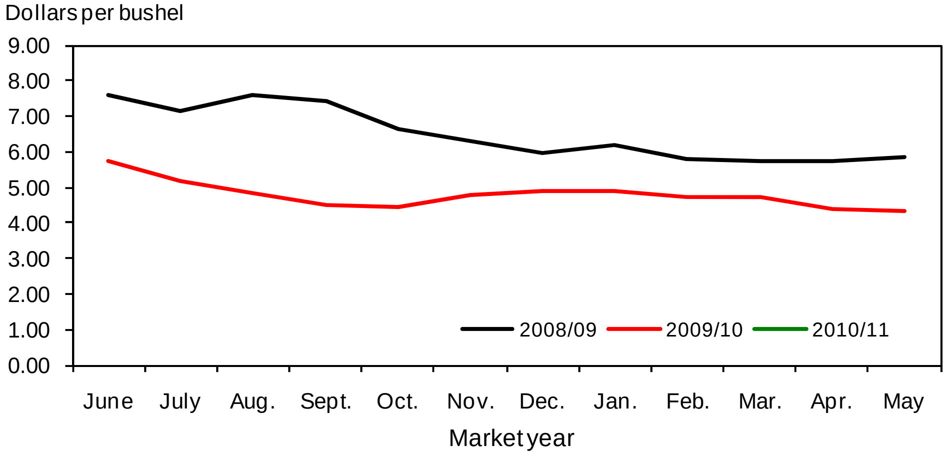
2010/11 U.S. Export Prospects Boosted Due to Increased Supplies and Reduced Competition

World wheat trade for 2010/11 (July-June) is slightly down this month, at 130.6 million tons. A small 0.2-million-ton increase in projected imports for Turkey (smaller domestic wheat production) almost offset a 0.3-million-ton reduction in U.S. import prospects. The reduction is based on a smaller Canadian crop and therefore lower exports into the U.S. The projected 2010/11 wheat export for Canada is cut 2.0 million tons this month, to 15.5 million due to reduced production. Also, lower production prospects in Russia, Kazakhstan, and Turkey contributed to the countries' export reductions of 2.5, 1.5, and 0.3 million tons, respectively. These reductions in production prospects and exports provided additional support for higher export forecasts for the EU-27, Australia, and the United States. Despite lower EU-27 projected wheat production, its wheat stocks are still plentiful and, combined with lower Russian wheat production and stocks, as well as with anticipated depreciation of the euro, EU-27 wheat is expected to be competitive in 2010/11, and its exports are projected to be up 1.0 million tons to 23.0 million. The same is true for Australia, where exports are expected to benefit from smaller wheat crops and stocks among its competitors, and from depreciation of the Australian dollar, such that the country is projected to export 1.0 million tons more reaching 15.0 million. U.S. wheat production is up 4.0 million tons this month to 60.3 million, while wheat supplies are up even more–5.0 million tons–due to increased beginning stocks. U.S. supplies are 8.2 million tons higher year to year. Strong early sales and reduced competition, especially from Canada, boost prospects for U.S. wheat exports in 2010/11. The July-June U.S. exports projection is increased 2.5 million tons this month to 27.0 million, with the June-May local marketing year exports up 100 million bushels to 1.0 billion. According to *U.S. Export Sales* (see www.fas.usda.gov/export-sales/wheat.htm) as of July 1, outstanding sales of U.S. wheat were up 42 percent compared wit a year ago and above the 5-year average, with the biggest increases for Japan, Brazil, Peru, Mexico, Nigeria, Philippines, and Thailand.

World wheat trade in 2009/10 was slightly adjusted to reflect reported trade data, licenses, and sales. EU-27 imports were decreased 0.5 million tons to 5.5 million, based on reported licenses and a slower pace of imports. Partly offsetting are increased imports for Mexico and Nigeria, up 0.2 million tons each.

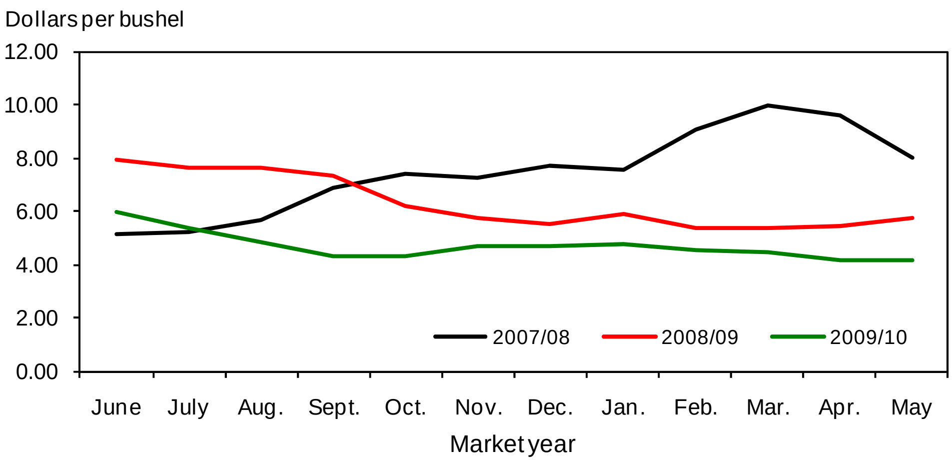
Canada's exports are up 0.5 million tons to 18.5 million as the pace in recent months exceeded expectations. This increase is offset by a reduction for the United States for the international July-June marketing year. U.S. exports were cut 0.4 million tons to 23.6 million as inspections and exports sales shipments in June 2010 were not as strong as expected a month ago. Census data for June are not yet available, and the current number is not finalized. For the local June-May marketing year, U.S. exports are reduced 0.5 million tons to 23.5 million (or 865 million bushels).

Figure 1
All wheat average prices received by farmers



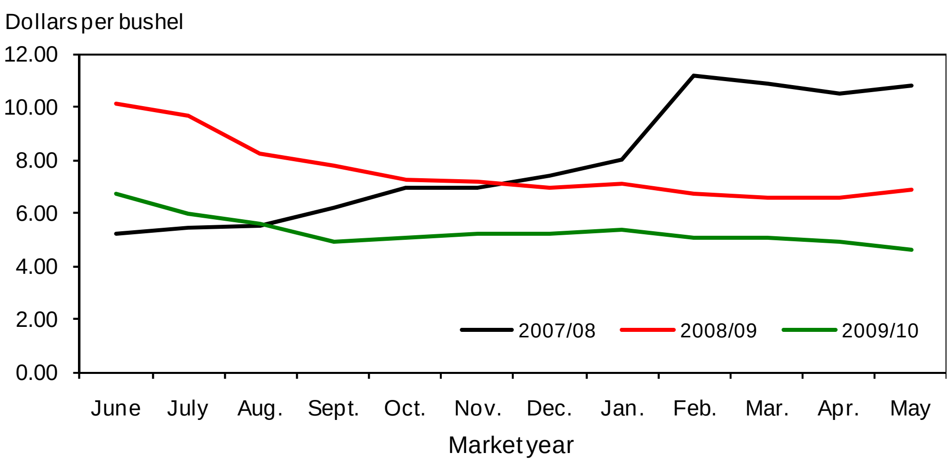
Source: USDA, National Agricultural Statistics Service, *Agricultural Prices*.

Figure 2
Hard red winter wheat average prices received by farmers



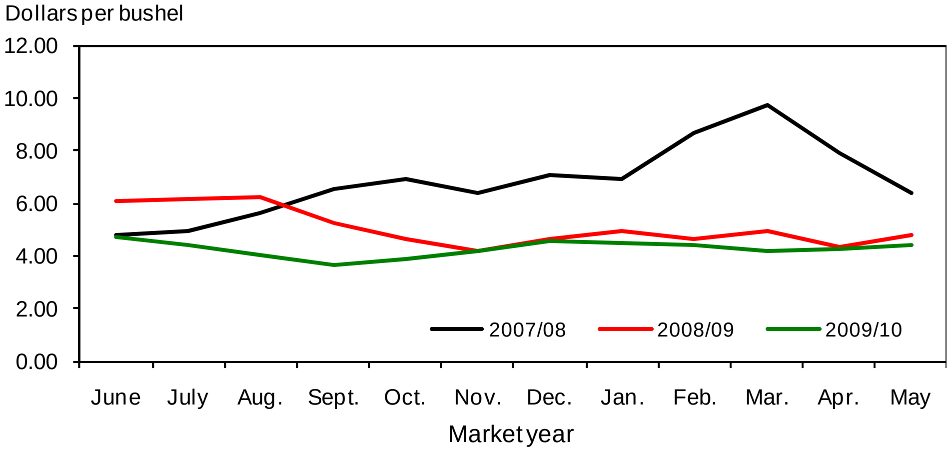
Source: USDA, National Agricultural Statistics Service, *Agricultural Prices*.

Figure 3
Hard red spring wheat average prices received by farmers



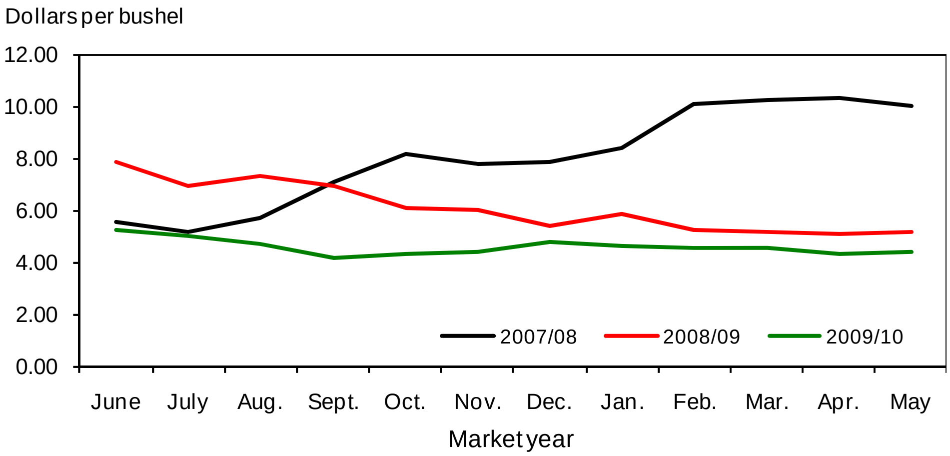
Source: USDA, National Agricultural Statistics Service, *Agricultural Prices*.

Figure 4
Soft red winter wheat average prices received by farmers



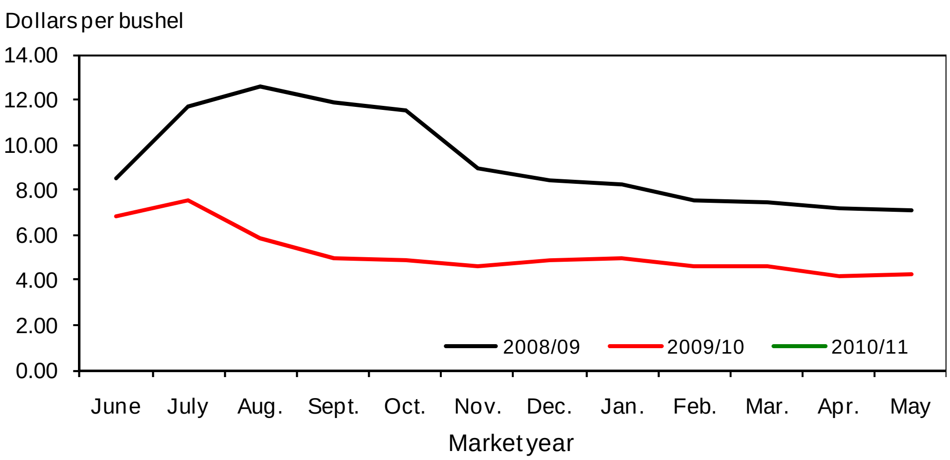
Source: USDA, National Agricultural Statistics Service, *Agricultural Prices*.

Figure 5
Soft white wheat average prices received by farmers



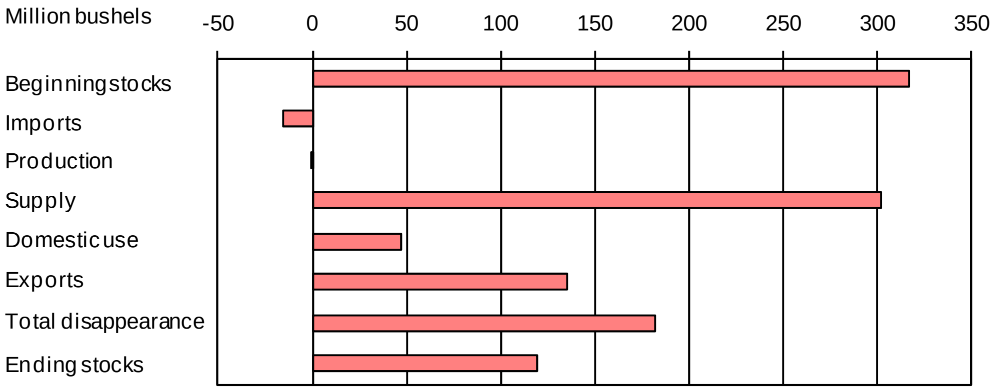
Source: USDA, National Agricultural Statistics Service, *Agricultural Prices*.

Figure 6
Durum wheat average prices received by farmers



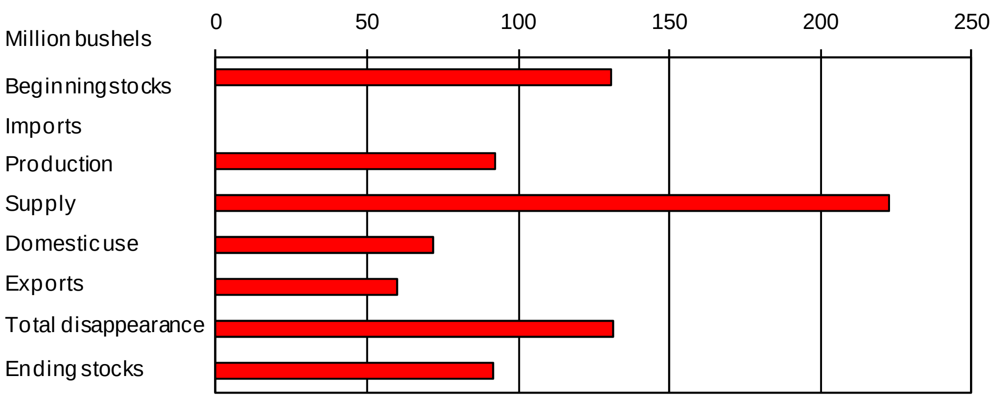
Source: USDA, National Agricultural Statistics Service, *Agricultural Prices*.

Figure 7
All wheat: U.S. supply and disappearance change from prior market year



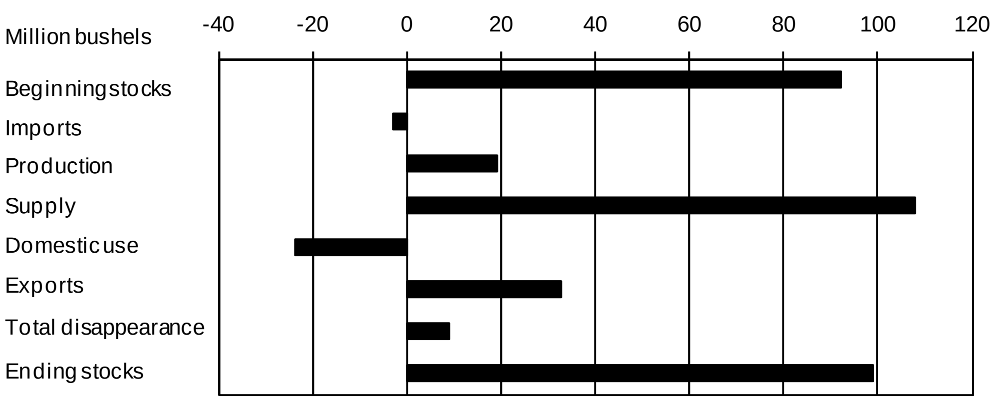
Source: USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates*.

Figure 8
Hard red winter wheat: U.S. supply and disappearance change from prior market year



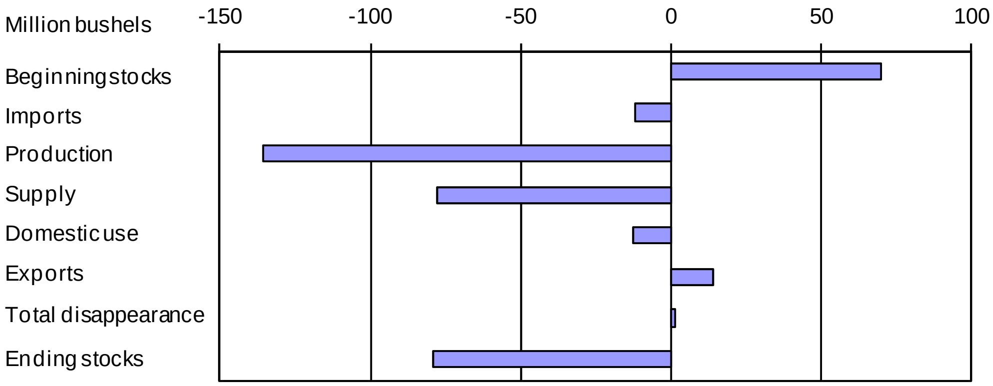
Source: USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates*.

Figure 9
Hard red spring wheat: U.S. supply and disappearance change from prior market year



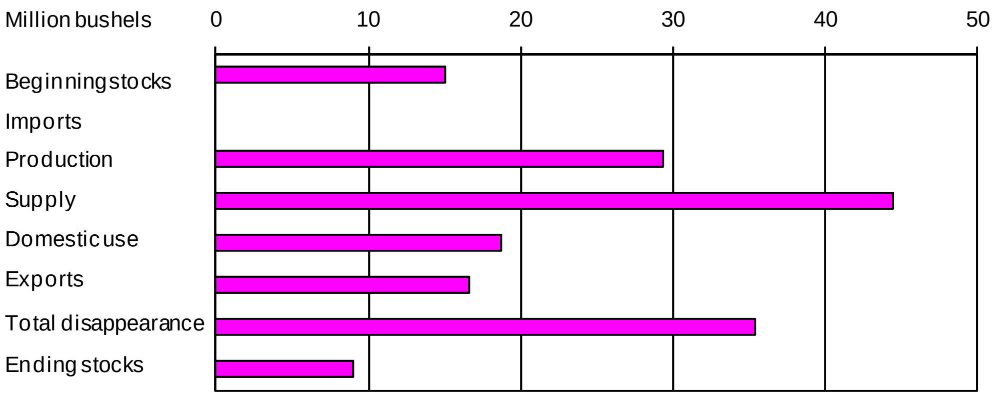
Source: USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates*.

Figure 10
Soft red winter wheat: U.S. supply and disappearance change from prior market year



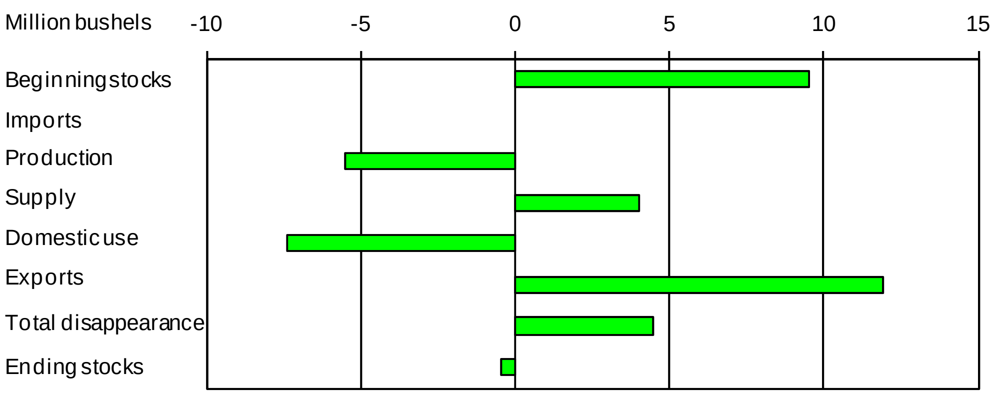
Source: USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates*.

Figure 11
White wheat: U.S. supply and disappearance change from prior market year



Source: USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates*.

Figure 12
Durum: U.S. supply and disappearance change from prior market year



Source: USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates*.

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Data

Monthly tables from *Wheat Outlook* are available in Excel (.xls) spreadsheets at http://www.ers.usda.gov/briefing/wheat/data.htm. These tables contain the latest data on supply and disappearance, monthly food-use estimates, prices, exports, and imports.

Related Websites

Wheat Outlook
http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1293
WASDE
http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1194
Grain Circular, http://www.fas.usda.gov/grain_arc.asp
Wheat Briefing Room, http://www.ers.usda.gov/briefing/wheat/

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Table 1--Wheat: U.S. market year supply and disapperance, 7/13/2010

Item and unit		2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11
Area:								
Planted	Million acres	59.6	57.2	57.3	60.5	63.2	59.1	54.3
Harvested	Million acres	50.0	50.1	46.8	51.0	55.7	49.9	48.3
Yield	Bushels per acre	43.2	42.0	38.6	40.2	44.9	44.4	45.9
Supply:								
Beginning stocks	Million bushels	546.4	540.1	571.2	456.2	305.8	656.5	973.4
Production	Million bushels	2,156.8	2,103.3	1,808.4	2,051.1	2,499.2	2,216.2	2,215.8
Imports 1/	Million bushels	70.6	81.4	121.9	112.6	127.0	115.0	100.0
Total supply	Million bushels	2,773.8	2,724.8	2,501.5	2,619.9	2,932.0	2,987.7	3,289.2
Disappearance:								
Food use	Million bushels	909.6	917.1	937.9	947.9	926.6	920.0	940.0
Seed use	Million bushels	77.6	77.1	81.9	87.6	78.0	70.5	76.0
Feed and residual use	Million bushels	180.6	156.6	117.1	16.0	255.3	158.8	180.0
Total domestic use	Million bushels	1,167.8	1,150.8	1,136.8	1,051.4	1,260.0	1,149.3	1,196.0
Exports 1/	Million bushels	1,065.9	1,002.8	908.5	1,262.6	1,015.5	865.0	1,000.0
Total disapperance	Million bushels	2,233.7	2,153.6	2,045.3	2,314.1	2,275.5	2,014.3	2,196.0
Ending stocks	Million bushels	540.1	571.2	456.2	305.8	656.5	973.4	1,093.2
CCC inventory 2/	Million bushels	54.0	43.0	41.0				
Stocks-to-use ratio		24.2	26.5	22.3	13.2	28.9	48.3	49.8
Contract/direct payment rate	Dollars per bushel	0.52	0.52	0.52	0.52	0.52	0.52	0.52
Farm price 3/	Dollars per bushel	3.40	3.42	4.26	6.48	6.78	4.87	4.20-5.00
Government payments	Million dollars	1,218	1,151	1,120	1,118	1,118		
Market value of production	Million dollars	7,283	7,171	7,695	13,289	16,944	10,793	10,193

Latest market year is projected; previous market year is estimated. Totals may not add due to rounding.
1/ Includes flour and selected other products expressed in grain-equivalent bushels.
2/ Stocks owned by USDA's Commodity Credit Corporation (CCC). Most CCC-owned inventory is in the Bill Emerson Humanitarian Trust.
3/ U.S. season-average price based on monthly prices weighted by monthly marketings. Prices do not include an allowance for loans outstanding and government purchases.
Source: USDA, World Agricultural Outlook Board, World Agricultural Supply and Demand Estimates and supporting materials.

Date run: 7/12/2010

Table 2--Wheat: U.S. market year supply and disappearance, 7/13/2010

Market year, item, and unit			All wheat	Hard red winter 1/	Hard red spring 1/	Soft red winter 1/	White 1/	Durum
2009/10	Area:							
	Planted acreage	Million acres	59.13	31.65	12.61	8.31	4.01	2.55
	Harvested acreage	Million acres	49.87	24.14	12.32	7.19	3.79	2.43
	Yield	Bushels per acre	44.44	38.08	44.48	56.10	62.38	44.91
	Supply:							
	Beginning stocks	Million bushels	656.51	254.43	142.00	171.00	64.00	25.07
	Production	Million bushels	2,216.17	919.02	547.93	403.56	236.62	109.04
	Imports 2/	Million bushels	115.00	1.00	38.00	32.00	9.00	35.00
	Total supply	Million bushels	2,987.68	1,174.45	727.93	606.56	309.62	169.12
	Disappearance:							
	Food use	Million bushels	920.00	363.00	238.00	156.00	83.00	80.00
	Seed use	Million bushels	70.47	31.87	17.73	11.15	5.53	4.19
	Feed and residual use	Million bushels	158.82	29.44	30.93	92.49	-1.26	7.22
	Total domestic use	Million bushels	1,149.28	424.30	286.66	259.64	87.27	91.41
	Exports 2/	Million bushels	865.00	365.35	207.27	105.93	143.35	43.10
	Total disappearance	Million bushels	2,014.28	789.66	493.93	365.56	230.62	134.51
	Ending stocks	Million bushels	973.39	384.79	234.00	241.00	79.00	34.60
2010/11	Area:							
	Planted acreage	Million acres	54.31	28.46	13.26	5.83	4.08	2.68
	Harvested acreage	Million acres	48.26	23.97	12.96	4.83	3.92	2.59
	Yield	Bushels per acre	45.91	42.20	43.74	55.46	67.92	40.00
	Supply:							
	Beginning stocks	Million bushels	973.39	384.79	234.00	241.00	79.00	34.60
	Production	Million bushels	2,215.76	1,011.49	567.00	267.77	265.99	103.51
	Imports 2/	Million bushels	100.00	1.00	35.00	20.00	9.00	35.00
	Total supply	Million bushels	3,289.15	1,397.28	836.00	528.77	353.99	173.12
	Disappearance:							
	Food use	Million bushels	940.00	383.00	237.00	155.00	85.00	80.00
	Seed use	Million bushels	76.00	33.00	21.00	12.00	6.00	4.00
	Feed and residual use	Million bushels	180.00	80.00	5.00	80.00	15.00	.00
	Total domestic use	Million bushels	1,196.00	496.00	263.00	247.00	106.00	84.00
	Exports 2/	Million bushels	1,000.00	425.00	240.00	120.00	160.00	55.00
	Total disappearance	Million bushels	2,196.00	921.00	503.00	367.00	266.00	139.00
	Ending stocks	Million bushels	1,093.15	476.28	333.00	161.77	87.99	34.12

Latest market year is projected; previous market year is estimated. Totals may not add due to rounding.
1/ Area and yield data are unpublished National Agricultural Statistics Service data. Supply and disappearance data, except production, are approximations.
2/ Includes flour and selected other products expressed in grain-equivalent bushels.
Source: USDA, National Agricultural Statistics Service, Crop Production and unpublished data; and USDA, World Agricultural Outlook Board, World Agricultural Supply and Demand Estimates and supporting materials.

Date run: 7/12/2010

Table 3--Wheat: U.S. quarterly supply and disappearance (million bushels), 7/13/2010

Market year and quarter		Production	Imports 1/	Total supply	Food use	Seed use	Feed and residual use	Exports 1/	Ending stocks
2002/03	Jun-Aug	1,606	27	2,410	233	3	185	240	1,749
	Sep-Nov		23	1,772	238	55	-75	235	1,320
	Dec-Feb		13	1,333	219	3	14	190	907
	Mar-May		15	922	229	24	-8	186	491
	Mkt. year	1,606	77	2,460	919	84	116	850	491
2003/04	Jun-Aug	2,344	16	2,852	231	2	315	265	2,039
	Sep-Nov		18	2,057	240	53	-62	305	1,520
	Dec-Feb		13	1,533	216	2	3	291	1,021
	Mar-May		17	1,037	226	22	-54	296	546
	Mkt. year	2,344	63	2,899	912	80	203	1,158	546
2004/05	Jun-Aug	2,157	17	2,721	227	4	264	287	1,938
	Sep-Nov		19	1,957	236	47	-56	300	1,430
	Dec-Feb		18	1,448	218	2	3	240	984
	Mar-May		17	1,001	229	24	-31	239	540
	Mkt. year	2,157	71	2,774	910	78	181	1,066	540
2005/06	Jun-Aug	2,103	19	2,662	231	2	261	244	1,923
	Sep-Nov		20	1,944	238	50	-61	286	1,429
	Dec-Feb		20	1,450	219	1	4	252	972
	Mar-May		22	995	228	24	-49	220	571
	Mkt. year	2,103	81	2,725	917	77	157	1,003	571
2006/07	Jun-Aug	1,808	26	2,406	235	2	205	214	1,751
	Sep-Nov		29	1,780	243	56	-47	212	1,315
	Dec-Feb		32	1,346	225	1	28	235	857
	Mar-May		34	891	234	22	-69	247	456
	Mkt. year	1,808	122	2,501	938	82	117	908	456
2007/08	Jun-Aug	2,051	30	2,538	240	1	257	323	1,717
	Sep-Nov		21	1,738	245	60	-120	421	1,132
	Dec-Feb		24	1,156	227	2	-44	261	709
	Mar-May		37	746	236	25	-77	257	306
	Mkt. year	2,051	113	2,620	948	88	16	1,263	306
2008/09	Jun-Aug	2,499	28	2,833	236	2	393	345	1,858
	Sep-Nov		28	1,886	238	54	-124	295	1,422
	Dec-Feb		36	1,458	219	1	28	170	1,040
	Mar-May		35	1,075	233	21	-41	206	657
	Mkt. year	2,499	127	2,932	927	78	255	1,015	657
2009/10	Jun-Aug	2,216	28	2,900	231	1	259	199	2,209
	Sep-Nov		24	2,234	237	46	-84	253	1,782
	Dec-Feb		30	1,812	220	1	33	202	1,356
	Mar-May		33	1,390	232	22	-49	211	973
	Mkt. year	2,216	115	2,988	920	70	159	865	973
2010/11	Mkt. year	2,216	100	3,289	940	76	180	1,000	1,093

Latest market year is projected; previous market year is estimated. Totals may not add due to rounding.
1/ Includes flour and selected other products expressed in grain-equivalent bushels.
Source: USDA, World Agricultural Outlook Board, World Agricultural Supply and Demand Estimates and supporting materials.

Date run: 7/12/2010

Table 4--Wheat: Monthly food disapperance estimates (1,000 grain-equivalent bushels), 7/13/2010

Mkt year and month 1/		Wheat ground for flour	+	Food imports 2/	+	Nonmilled food use 3/	-	Food exports 2/	=	Food use 4/
2008/09	Jun	73,124		2,436		2,000		1,954		75,605
	Jul	74,811		2,311		2,000		1,995		77,127
	Aug	81,763		2,106		2,000		2,403		83,467
	Sep	78,621		1,848		2,000		2,500		79,969
	Oct	78,898		1,943		2,000		2,402		80,439
	Nov	75,517		2,129		2,000		1,634		78,012
	Dec	70,884		1,999		2,000		1,743		73,140
	Jan	71,473		1,902		2,000		1,865		73,511
	Feb	70,906		1,755		2,000		1,864		72,797
	Mar	75,228		2,120		2,000		1,194		78,153
	Apr	73,708		2,082		2,000		1,257		76,533
	May	75,364		2,068		2,000		1,406		78,026
2009/10	Jun	72,104		2,010		2,000		2,505		73,609
	Jul	74,023		1,984		2,000		2,047		75,960
	Aug	80,902		2,164		2,000		3,420		81,646
	Sep	77,793		1,960		2,000		1,901		79,852
	Oct	78,638		2,302		2,000		2,824		80,115
	Nov	75,269		2,186		2,000		2,450		77,005
	Dec	70,651		2,108		2,000		1,592		73,167
	Jan	72,585		2,038		2,000		1,896		74,727
	Feb	72,009		1,852		2,000		2,222		73,638
	Mar	76,398		2,502		2,000		3,053		77,847
	Apr			2,183				2,316		-132

1/ Current year is preliminary. Previous year is preliminary through August of current year, estimated afterwards.
2/ Food imports and exports used to calculate total food use. Includes all categories of wheat flour, semolina, bulgur, and couscous and selected categories of pasta.
3/ Wheat prepared for food use by processes other than milling.
4/ Estimated food use equals wheat ground for flour plus food imports plus nonmilled food use minus food exports. See http://www.ers.usda.gov/Briefing/Wheat/wheatfooduse.htm for more information.
Sources: Calculated using data from U.S. Department of Commerce, Bureau of the Census, Flour Milling Products (MQ311A) and Foreign Trade Statistics.

Date run: 7/12/2010

Table 5--Wheat: National average price received by farmers (dollars per bushel) 1/, 7/13/2010

Month	All wheat		Winter		Durum		Other spring	
	2009/10	2010/11	2009/10	2010/11	2009/10	2010/11	2009/10	2010/11
June	5.72	3.80	5.47	3.66	6.83	4.21	6.66	4.67
July	5.17		5.02		7.57		5.96	
August	4.85		4.67		5.83		5.54	
September	4.48		4.20		4.95		4.85	
October	4.47		4.27		4.86		5.00	
November	4.79		4.60		4.59		5.19	
December	4.87		4.68		4.91		5.18	
January	4.90		4.67		4.94		5.30	
February	4.73		4.53		4.61		5.04	
March	4.70		4.45		4.57		5.04	
April	4.41		4.19		4.17		4.89	
May	4.33		4.21		4.28		4.61	

1/ Preliminary mid-month, weighted-average price for current month.
Source: USDA, National Agricultural Statistics Service, Agricultural Prices.

Table 6--Wheat: National average prices received by farmers by class (dollars per bushel), 7/13/2010

Month	Hard red winter		Soft red winter		Hard red spring		White	
	2008/09	2009/10	2008/09	2009/10	2008/09	2009/10	2008/09	2009/10
June	7.91	5.96	6.07	4.72	10.10	6.72	7.88	5.23
July	7.59	5.36	6.15	4.37	9.68	6.00	6.89	4.99
August	7.61	4.84	6.19	4.04	8.20	5.59	7.31	4.68
September	7.31	4.32	5.27	3.63	7.80	4.87	6.96	4.14
October	6.20	4.28	4.60	3.86	7.27	5.04	6.10	4.30
November	5.72	4.68	4.17	4.21	7.17	5.24	5.97	4.39
December	5.48	4.68	4.63	4.52	6.97	5.21	5.39	4.74
January	5.86	4.73	4.92	4.49	7.10	5.33	5.83	4.59
February	5.39	4.54	4.61	4.37	6.73	5.06	5.26	4.56
March	5.37	4.48	4.97	4.14	6.57	5.06	5.12	4.52
April	5.47	4.16	4.31	4.26	6.57	4.92	5.10	4.34
May	5.76	4.16	4.75	4.38	6.90	4.62	5.13	4.35

Source: USDA, National Agricultural Statistics Service, Agricultural Prices.

Date run: 7/12/2010

Table 7--Wheat: Average cash grain bids at principal markets, 7/13/2010

Month	No. 1 hard red winter (ordinary protein) Kansas City, MO (dollars per bushel) 2009/10	2010/11	No. 1 hard red winter (13% protein) Kansas City, MO (dollars per bushel) 2009/10	2010/11	No. 1 hard red winter (ordinary protein) Portland, OR (dollars per bushel) 2009/10	2010/11	No. 2 hard red winter (ordinary protein) Gulf ports, LA 1/ (dollars per metric ton) 2009/10	2010/11
June	6.63	4.50	7.07	5.44	6.09	4.50	--	--
July	5.58	--	6.30	--	5.38	--	221.42	--
August	5.15	--	5.68	--	5.03	--	205.48	--
September	4.56	--	5.13	--	4.69	--	--	--
October	5.06	--	5.47	--	4.91	--	--	--
November	5.58	--	5.99	--	5.09	--	--	--
December	5.37	--	5.94	--	5.10	--	--	--
January	5.24	--	5.78	--	--	--	--	--
February	5.10	--	5.61	--	4.61	--	--	--
March	4.99	--	5.61	--	4.60	--	--	--
April	4.86	--	5.70	--	4.69	--	--	--
May	4.78	--	5.68	--	4.76	--	--	--

	No. 1 dark northern spring (13% protein) Minneapolis, MN (dollars per bushel) 2009/10	2010/11	No. 1 dark northern spring (14% protein) Minneapolis, MN (dollars per bushel) 2009/10	2010/11	No. 1 dark northern spring (14% protein) Portland, OR (dollars per bushel) 2009/10	2010/11	No. 1 hard amber durum Minneapolis, MN (dollars per bushel) 2009/10	2010/11
June	7.39	5.61	7.96	6.90	7.99	6.35	--	--
July	6.30	--	6.82	--	7.02	--	--	--
August	5.73	--	6.17	--	6.37	--	--	--
September	5.06	--	6.30	--	6.11	--	--	--
October	5.35	--	6.36	--	6.50	--	--	--
November	5.90	--	7.29	--	6.95	--	--	--
December	5.46	--	6.79	--	7.08	--	--	--
January	6.02	--	7.39	--	6.71	--	--	--
February	6.03	--	7.57	--	6.76	--	--	--
March	5.82	--	7.48	--	6.83	--	--	--
April	5.62	--	6.88	--	6.87	--	--	--
May	5.64	--	6.55	--	6.55	--	--	--

	No. 2 soft red winter St. Louis, MO (dollars per bushel) 2009/10	2010/11	No. 2 soft red winter Chicago, IL (dollars per bushel) 2009/10	2010/11	No. 2 soft red winter Toledo, OH (dollars per bushel) 2009/10	2010/11	No. 1 soft white Portland, OR (dollars per bushel) 2009/10	2010/11
June	5.04	--	4.96	4.26	4.85	4.34	5.91	4.57
July	4.14	--	4.45	--	4.21	--	5.32	--
August	3.33	--	4.18	--	4.09	--	4.90	--
September	2.68	--	3.70	--	3.72	--	4.53	--
October	3.04	--	4.01	--	4.09	--	4.67	--
November	3.69	--	4.53	--	4.54	--	4.89	--
December	3.82	--	4.67	--	4.56	--	4.96	--
January	4.13	--	4.55	--	4.57	--	4.83	--
February	4.18	--	4.37	--	4.29	--	4.76	--
March	4.11	--	4.38	--	4.26	--	4.64	--
April	4.07	--	4.43	--	4.24	--	4.76	--
May	4.38	--	4.49	--	4.24	--	4.76	--

-- = Not available or no quote.
1/ Free on board. Barge delivered to Louisiana gulf.
Source: USDA, Agricultural Marketing Service, State Grain Reports, http://www.ams.usda.gov/AMSv1.0/ams.fetchTemplateData.do?template=TemplateS&navID=MarketNewsAndTransportationData&leftNav=MarketNewsAndTransportationData&page=LSMarketNewsPageStateGrainReports.

Date run: 7/12/2010

Table 8--Wheat: U.S. exports and imports for last 6 months (1,000 bushels), 7/13/2010

Item		Nov 2009	Dec 2009	Jan 2010	Feb 2010	Mar 2010	Apr 2010
Exports	All wheat grain	68,117	54,438	65,060	76,522	73,780	76,958
	All wheat flour 1/	1,609	1,194	1,231	1,722	2,525	1,652
	All wheat products 2/	863	451	670	539	609	755
	Total all wheat	70,589	56,084	66,961	78,783	76,915	79,366
Imports	All wheat grain	4,890	5,082	9,321	9,460	9,671	8,844
	All wheat flour 1/	820	811	798	784	910	837
	All wheat products 2/	1,377	1,310	1,252	1,075	1,605	1,362
	Total all wheat	7,086	7,203	11,372	11,319	12,186	11,044

Totals may not add due to rounding.
1/ Expressed in grain-equivalent bushels. Includes meal, groats, and durum.
2/ Expressed in grain-equivalent bushels. Includes bulgur, couscous, and selected categories of pasta.
Source: U.S. Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics; and ERS calculations using Census trade statistics.

Date run: 7/12/2010

Table 9--Wheat: U.S. exports, Census and export sales comparison (1,000 metric tons),7/12/10

Importing country	2007/08		2008/09		2009/10(as of 7/9/10)		
	Shipments				Shipments	Out-standing	Total
Data source	Census 1/	Export sales 2/	Census 1/	Export sales 2/	Export sales 2/		
Country:							
Japan	3,598	3,319	3,178	3,103	326	444	770
Nigeria	2,504	2,597	2,638	2,661	292	624	916
Mexico	2,575	2,568	2,617	2,423	241	621	862
Egypt	2,908	3,276	1,865	1,928	0	0	0
Iran	0	0	1,764	1,764	0	0	0
Philippines	1,525	1,538	1,461	1,480	213	588	801
Iraq	1,912	1,964	1,162	1,205	307	0	307
South Korea	1,499	1,509	1,131	1,127	213	245	457
Brazil	533	501	753	24	26	190	216
Colombia	949	948	806	749	85	123	208
EU-27	1,774	1,915	654	918	0	78	78
Total grain	33,636	32,564	27,029	25,973	1,927	4,858	6,785
Total (including products)	34,373	32,617	27,624	26,061	1,931	4,862	6,793
USDA forecast of Census							27

1/ Source is U.S. Census Bureau

2/ Source is Foreign Agricultural Service's weekly *U.S. Export Sales* report.

Source: USDA, Foreign Agricultural Service's, U.S. Export Sales: and U.S. Department of Commerce, U.S. Census Bureau.