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Outlook for U.S. Agricultural Trade

Record Agricultural Trade Levels Forecast for Fiscal 2006

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World Agricultural
Outlook Board,
the Economic
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and the Foreign
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Agriculture.

The export forecast for 2006 is raised to a record \$67 billion—\$2.5 billion above February. A 5-million-ton increase in corn and sorghum shipments and higher unit values raise coarse grain exports to \$6.5 billion. U.S. corn faces less competition from China and Argentina, and prices are rising due to strong domestic demand for animal feed and ethanol production. Sorghum exports are raised due to strong feed grain demand from Mexico. Wheat export volume is lower, but higher unit values leave export value unchanged.

Compared with 2005, the export outlook reflects a sharp increase for horticultural products, mostly due to strong foreign demand and higher prices for fruits and tree nuts. Coarse grains are up due to large domestic crops, reduced foreign competition, and higher unit prices. Higher values for corn and soybeans are supported by strength in domestic demand for animal feeds and biofuel production. An increase in U.S. cotton exports is supported by a record U.S. crop, strong global consumption, and record demand from China. Beef exports are up, with increased sales to Canada and Mexico.

Forecast fiscal 2006 agricultural imports are raised to a record \$65 billion, up 13 percent from 2005 and continuing the faster pace that began in 2003. Fresh produce, wine, and beer continue to drive much of the growth, and vegetable oils and live cattle are also sharply higher. Beef imports are flat with more cattle crossing the border. Tropical products, especially rubber, coffee, and sugar, are up although their share of imports has fallen over the longer term.

Table 1--U.S. agricultural trade, fiscal years 2001-2006, year ending September 30

Item	2001	2002	2003	2004	2005	Forecast Fiscal 2006	
						Feb.	May
Exports	52.7	53.3	56.0	62.4	62.4	64.5	67.0
Imports	39.0	41.0	45.7	52.7	57.7	63.5	65.0
Balance	13.7	12.3	10.3	9.7	4.7	1.0	2.0

Reflects forecasts in the May 12, 2006 *World Agricultural Supply and Demand Estimates* report.
Sources: U.S. Department of Agriculture and Bureau of Census, U.S. Department of Commerce.

Economic Outlook

Growth in U.S. real gross domestic product (GDP) will continue at 3.5 percent in 2006—the same as in 2005. World GDP growth is forecast at 3.6 percent in 2005 and for 2006, making 2004-06 the strongest period since the late 1980s. Overall, rapid world growth balances modest growth in Europe and Japan against above-average economic performance in Asia, the transition economies, and the Western Hemisphere. Despite uncertain impact on world growth, high energy prices will add significantly to U.S. farm costs.

The World Energy and Industrial Material Situation

The spot West Texas Intermediate Crude oil has been near \$70 per barrel for several months. Gasoline and diesel prices are above \$3 per gallon. Farm fuel expenses in 2006 will likely be above the 2005 expenses even if crude prices fall. Largely due to the fast growth in India and China, non-energy raw material prices soared in late 2005. Material prices are up from mid-2005, putting upward pressure on inflation.

The major risk to strong world growth stems from high crude oil and industrial commodity prices, which are projected to remain high. The inflationary consequences will require central banks to raise interest rates. The question is how much monetary authorities have to raise interest rates to tame inflation. How will the economies respond to higher interest rates? Then what will happen to the dollar? How these factors will play out in the next 2 years is the largest variable in sustaining growth.

Developed Economies

U.S. interest rates continue to rise in 2006 from the near-record lows of 2004-05, reflecting strong world credit demand, higher short-term U.S. interest rates, and a higher inflation risk premium in long-term rates. The Consumer Price Index (CPI) inflation rose, largely due to higher energy and industrial commodity prices, to 3.4 percent in 2005. With increased inflationary pressures, the Federal Reserve Board may need to further raise short-term interest rates above the current 5-percent federal funds rate target. The dollar is expected to appreciate modestly on average in 2006 against the yen, stabilize against the euro, while depreciating slightly against the currencies of less-developed countries.

Canada, our leading trade partner, had GDP growth of 3 percent in 2005, which is slated to continue in 2006. The boom in industrial commodity prices has boosted the Canadian dollar to levels last seen in September 1991.

Japan's GDP grew 2.7 percent in 2005, and is expected to grow 3 percent in 2006. The yen is expected to continue to depreciate modestly against the dollar in 2006, despite tighter Japanese monetary policy.

Growth in the European Union-25 (EU-25) is expected to rise from 1.5 percent in 2005 to 2.3 percent in 2006. As the euro has strengthened from early 2006, the competitiveness of European exports should modestly decline. The dollar should stabilize against the euro in 2006, as the U.S. and European interest rate gap narrows.

World Growth Prospects for 2006 Highly Dependent on China

China's economic growth has been central to robust world economic growth. Its 2006 growth is estimated at 9.5 percent, slightly below the near-10 percent of 2005. Surging growth continues to keep demand for raw materials high, supporting prices for oil, industrial materials, and some agricultural commodities.

China's growth in total imports in the first quarter of 2006 was phenomenal with a 10-percent growth in oil demand helping power the 36-percent auto production growth. Strong import growth makes prospects for world growth and high commodity prices solid for 2006. High energy prices could have already subdued global growth, if Japan and Europe had not benefited from growing Chinese import demand. With the more flexible exchange rate regime instituted by the Chinese, the dollar is expected to depreciate modestly against the yuan in 2006.

Developing Economies

Economic growth in developing countries in 2006 is forecast to be over 6 percent—the same rate as in 2005. Developing Asia continues to be the fastest growing region. Asian growth is likely to hit 7 percent in 2006, similar to 2004 and 2005. India's GDP grew 8 percent in 2005 and is expected to continue at that pace into 2006 despite high oil prices. Growth in South Korea and Southeast Asia will be 5 percent. Most of the non-Chinese Asian economies should see their currencies continue to strengthen against the dollar.

The five major economies in Latin America—Argentina, Brazil, Mexico, Venezuela, and Chile—are all experiencing strong growth. The region is estimated to have grown 4.5 percent in 2005, and is projected to grow as fast in 2006. Growth in Brazil is estimated at 2.3 percent in 2005, and is forecast to grow 4 percent in 2006. The use of biofuels in Brazil has mitigated the impact of high oil prices. Argentina is likely to have grown over 9 percent in 2005, but is projected to slow into the high 6-percent range in 2006. Depreciation of the peso will keep Argentina a strong agricultural export competitor through 2006. As Mexico's economy is strongly tied to the United States, GDP growth in Mexico was 4.5 percent in 2005, and this growth rate is expected to continue in 2006. Chile, which has followed a strong export-oriented policy, had GDP growth of around 6 percent in 2005 and is projected to continue strong growth into 2006. The major currencies of this region should appreciate relative to the dollar in real terms in 2006.

GDP growth rates continue to be substantial for most countries of the former Soviet Union. While Africa's growth has improved markedly in recent years to an average rate exceeding 4 percent, growth varies considerably among countries there.

Exchange Rates

The agricultural trade-weighted dollar for high-valued products depreciated around 5 percent in 2005 compared with 2004. As the dollar stabilizes against the euro, appreciates against the yen, and weakens against developing nations' currencies, there is likely to be a mild decline for the farm trade-weighted dollar in 2006. Thus, the value of the dollar will continue to support U.S. farm and manufacturing export growth in 2006, as it did in 2005.

Export Products

Fiscal 2006 grain and feed exports are forecast at \$18.1 billion, up \$1.6 billion from February and \$1.9 billion above fiscal 2005. This improved outlook is due to an increase of 4.5 million tons in corn shipments and a 500,000-ton increase for sorghum. Larger volumes, coupled with higher unit values, boost coarse grain value \$1.3 billion, to \$6.5 billion. Corn shipments soared in the absence of significant competition from China and Argentina, and unit values are rising with strong domestic demand for feed and ethanol production. Sorghum exports are forecast at 5 million tons, the highest in 4 years due to strong feed grain demand from Mexico.

Since February, a 700,000-ton reduction in wheat shipments, offset by higher unit values, leaves wheat export value unchanged at \$4.4 billion. Wheat shipments are reduced because the 2006/07 domestic wheat crop estimate was lower than expected. Rice export volume is down 200,000 tons to 4.1 million tons, but higher unit values leaves export value unchanged. Lower rice shipments result from higher U.S. rice prices, which reduce U.S. competitiveness, unresolved import restrictions in Turkey and the slow pace of shipments and sales to Iraq.

Compared with the previous year, the outlook for 2005/06 global grain markets reflects continued large U.S. and global grain supplies, as well as strong domestic and global demand. The 2005/06 U.S. rice and corn crops are expected to be the second largest on record. The increase in export volume forecast for corn (up 6.9 million tons in fiscal 2006) is largely due to reduced competition from major suppliers. Export unit values for coarse grains, wheat, and rice are higher.

The fiscal 2006 export forecast for oilseeds and products is raised \$300 million from February to \$10.1 billion, but remains \$900 million below 2005. Soybean and soybean oil shipments are reduced from February, but unit prices are higher, leaving value unchanged. Larger shipments and stronger prices for soybean meal raise the value of exports. Larger shipments of rapeseed and products and protein isolates and concentrates raise their export values.

Fiscal 2006 soybean and soybean oil shipments are lower than in February due to competition from South America, particularly in Europe. European demand for imported soybeans and oil is lower this year as EU-25 rapeseed production increased. Brazilian sales to the EU-25 remain relatively firm, lowering the U.S. share of the EU-25 import market. The EU-25 became a net soybean oil importer this year due to increased demand from the energy sector and lower internal supplies. Stronger U.S. soybean meal exports are forecast, given strong sales to Mexico and Canada.

Compared with the previous year, the fiscal 2006 export outlook for U.S. oilseeds and products reflects both abundant U.S. soybean supplies and a record South American crop. The second-largest domestic soybean crop was produced in 2005/06, but export volumes are forecast lower due to South American competition. Despite these conditions, higher U.S. soybean and product unit values are expected due to record demand from China and demand in global energy and domestic feed markets.

The fiscal 2006 forecast for U.S. cotton exports is up slightly from the February forecast to record levels—3.7 million tons valued at \$4.6 billion. An increase in

expected U.S. cotton exports is supported by the record crop and strong global consumption. China's consumption and imports show the strongest growth.

Fiscal 2006 exports of livestock, poultry, and dairy products are forecast to reach a record \$12.8 billion, up slightly from February, and \$700 million above 2005. Most of the \$200 million increase since February is due to larger expected broiler meat exports, but hides and skins exports are also edging up. A sharp decline in broiler parts prices since last fall has spurred shipments to Russia and China. In addition, larger shipments to price-sensitive markets like Mexico and some Caribbean countries, support a \$100-million increase in the value of broiler meat exports. Concerns over avian influenza (AI) remain a major factor in Central Europe as evidenced by a sharp drop in sales to Turkey, a major transshipment point.

The fiscal 2006 beef export forecast remains unchanged from February at roughly 300,000 tons valued at \$1.2 billion. U.S. exports of beef are still constrained by concerns over bovine spongiform encephalopathy (BSE). Beef trade with Hong Kong, Taiwan, and Singapore resumed during the second quarter of the fiscal year and there were some beef shipments to Japan prior to the suspension in January. This forecast assumes shipments resume to Japan during the last quarter of the fiscal year, but no shipments to South Korea are included. The increase in the beef forecast from fiscal 2005 to 2006 is largely due to increased sales to Canada and Mexico. Pork shipments are up 55,000 tons to 990,000 tons, but lower unit value leaves export value unchanged at \$2.3 billion. A weaker U.S. dollar is keeping U.S. pork price-competitive, while BSE and AI concerns keep foreign demand strong.

The export forecast for U.S. horticultural products is up slightly from February to a record \$16.4 billion, or \$1.9 billion above fiscal 2005. A competitive U.S. dollar, strong foreign demand, and higher prices support this outlook. At \$3.1 billion, tree nuts are forecast to rise \$700 million and account for about 40 percent of the annual increase in horticulture. Supported by strong European demand, almond exports are responsible for most of this increase. During the first half of fiscal 2006, tree nut export volume is up 12 percent and value is up 27 percent.

The forecast for fruit and preparations is increased \$100 million to \$4.5 billion, up \$400 million from 2005. Apple exports to Mexico are reaching levels not seen since 2001, and shipments to Taiwan are rising. Apples are also moving well to Canada, the United Kingdom and China. Fresh table grape exports to Asian markets are up sharply, with record sales expected. Fresh citrus exports remain strong. Despite Hurricane Wilma, Florida's grapefruit crop is still forecast above last year's hurricane-ravaged crop.

The vegetable and preparations export forecast remains at \$3.7 billion, up \$230 million from fiscal 2005. Fresh vegetable (including potato) exports to Canada and Japan, the two largest U.S. markets, are down so far this year due to cold weather crop delays and flooding in California, but are expected to fully recover in the coming months. With the exception of wine, exports of other horticultural products such as essential oils, beer and other food preparations, are expected to increase. The wine value forecast is largely unchanged, but year-to-date volume is down about 10 percent. Bulk wine shipments to Italy have increased, to supply a new bottling facility, which ships the wine elsewhere in Europe.

Table 2--U.S. agricultural exports: Value and volume by commodity, 2005-2006

Commodity	October-March		Fiscal year 2005	Forecast Fiscal 2006	
	2005	2006		Feb.	May
---Billion dollars---					
VALUE					
Grains and feeds 1/	7.984	9.042	16.194	16.5	18.1
Wheat 2/	2.108	2.241	4.236	4.4	4.4
Rice	0.593	0.723	1.241	1.4	1.4
Coarse grains 3/	2.688	3.059	5.299	5.2	6.5
Corn	2.385	2.732	4.730	4.8	5.8
Feeds and fodders	1.333	1.530	2.706	2.8	2.9
Oilseeds and products	7.432	6.697	11.031	9.8	10.1
Soybeans	5.313	4.480	7.019	5.9	5.9
Soybean meal 4/	0.782	0.852	1.488	1.3	1.4
Soybean oil	0.217	0.173	0.351	0.3	0.3
Livestock products	3.698	4.244	7.439	8.1	8.2
Beef and veal	0.378	0.603	0.832	1.2	1.2
Pork	1.096	1.186	2.236	2.3	2.3
Beef and pork variety meats	0.324	0.385	0.687	0.8	0.8
Hides and skins, incl. furs	0.843	0.936	1.746	1.8	1.8
Poultry and products	1.390	1.537	3.011	2.9	3.0
Broiler meat 5/	0.932	1.016	2.025	1.9	2.0
Dairy products	0.893	0.793	1.685	1.6	1.6
Tobacco, unmanufactured	0.649	0.715	0.983	1.1	1.1
Cotton and linters	1.798	2.321	3.872	4.5	4.6
Seeds	0.572	0.563	0.925	0.9	0.9
Horticultural products	7.224	8.127	14.524	16.3	16.4
Fruits and preparations	1.888	2.181	4.087	4.4	4.5
Vegetables and preparations	1.744	1.777	3.468	3.7	3.7
Tree nuts and preparations	1.358	1.725	2.418	3.1	3.1
Sugar and tropical products	1.293	1.439	2.701	2.9	2.9
Major bulk products 6/	14.768	15.025	22.667	22.5	23.9
Total	32.933	35.479	62.385	64.5	67.0
---Million metric tons---					
VOLUME					
Wheat 2/	12.965	13.476	26.406	27.2	26.5
Rice	1.942	2.279	4.230	4.3	4.1
Coarse grains 3/	26.031	28.388	50.382	52.3	57.4
Corn	23.203	25.471	45.138	47.5	52.0
Feeds and fodders	5.334	5.912	10.934	11.0	11.4
Oilseeds and products	28.861	24.251	39.558	34.4	34.5
Soybeans	23.275	18.650	29.607	24.8	24.5
Soybean meal 4/	3.798	3.758	6.709	6.0	6.3
Soybean oil	0.387	0.297	0.600	0.6	0.5
Beef, pork & variety meats	0.767	0.892	1.567	1.8	1.8
Beef and veal	0.095	0.143	0.204	0.3	0.3
Pork	0.431	0.501	0.882	0.9	1.0
Beef and pork variety meats	0.241	0.249	0.481	0.5	0.5
Broiler meat 5/	1.220	1.190	2.427	2.4	2.4
Tobacco, unmanufactured	0.097	0.112	0.151	0.2	0.2
Cotton and linters	1.518	1.807	3.368	3.6	3.7
Major bulk products 6/	65.828	64.712	114.213	112.4	116.4

Total may not add due to rounding. 1/ Includes pulses and processed grain products. 2/ Excludes wheat flour.

3/ Includes corn, barley, sorghum, oats, and rye. 4/ Includes soy flours made from protein meals. 5/ Includes only

Federally inspected product. 6/ Includes wheat, rice, coarse grains, soybeans, cotton and linters, and tobacco.

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

Regional Exports

With the fiscal 2006 export total rising by \$2.5 billion from the February forecast, exports will continue to expand most in East Asia, Canada, and Mexico. Exports are forecast lower for Southeast Asia and the EU-25, and remain largely unchanged for the Middle East.

China moves ahead of the EU-25 in the rankings of the top five destination countries for U.S. agricultural exports to take the fourth position in fiscal 2006. Canada remains the top destination, with U.S. exports estimated at \$11.4 billion. U.S. exports to Mexico are estimated at \$10.4 billion. Japan remains the third-largest export destination taking \$8 billion, followed by China at \$6.8 billion and the EU-25 at \$6.6 billion.

Exports to Canada are forecast up \$400 million from February's forecast with trade in fresh fruit, processed fruits and vegetables, and poultry accounting for most of the increase. The forecast for Mexico is up \$600 million supported by stronger sales of feed grains and soybean meal, and to a smaller amount by meats and fruit.

Exports to Asia are increased \$1.5 billion from the February forecast. This is largely due to higher forecasts of export volume and unit prices for corn shipped to Japan, Korea and Taiwan. Increases in the export estimates for fruits, cotton, soybean meal, animal feeds, and broiler meat support the higher estimate to Asia as well. The forecast for U.S. exports to China is raised \$1.4 billion to \$6.8 billion. Exports for the first half of fiscal 2006 are running well ahead of the fiscal 2005 pace, with an especially large gain for cotton. Sales of hides, tobacco leaf, poultry meat, and fresh fruit to China are up as well. Exports to Japan are increased \$400 million over the February forecast to \$8 billion largely due to higher corn unit values, but shipments are also up for animal feeds, fruits, and tree nuts. Export estimates to South Korea and Taiwan were raised on increased corn exports, but sales are also stronger than expected for pork, poultry meat and fruits.

Exports to Europe/Eurasia are down \$300 million from February, to \$8.4 billion. The forecast for the EU-25 is reduced to \$6.6 billion because EU demand for imported soybeans is somewhat weaker and competition with Brazil is stiff. Partly offsetting, wheat and tree nut exports are up. The forecast for Russia was raised to \$1.1 billion largely on the strength of broiler meat sales.

Exports to the Middle East are revised down slightly from the February forecast to \$2.9 billion. Reduced broiler meat sales to Turkey, Turkey's unresolved import restrictions on rice, and slower pace of rice sales and shipments elsewhere to the region impact the outlook. The forecast for Africa is raised on increased coarse grain and wheat exports, some increase in red meat and broiler meat sales, and record soybean shipments to North Africa.

Table 3--U.S. agricultural exports: Value by region, 2005-2006

Country and region 1/	October-March		Fiscal year 2005	Share of total	Forecast Fiscal year 2006	
	2005	2005			Feb.	May
	<i>Billion dollars</i>			<i>Percent</i>	<i>Billion dollars</i>	
Asia	12.365	13.431	22.540	36.1	22.6	24.1
East Asia	9.994	11.390	18.395	29.5	18.1	20.5
Japan	4.012	4.196	7.832	12.6	7.6	8.0
China	3.274	4.183	5.290	8.5	5.4	6.8
Hong Kong	0.469	0.474	0.882	1.4	0.8	0.9
Taiwan	1.095	1.268	2.197	3.5	2.2	2.5
South Korea	1.133	1.261	2.179	3.5	2.1	2.3
Southeast Asia	1.961	1.673	3.450	5.5	3.6	3.0
Indonesia	0.560	0.464	0.982	1.6	1.0	0.8
Philippines	0.457	0.438	0.836	1.3	0.9	0.8
Malaysia	0.213	0.219	0.382	0.6	0.4	0.4
Thailand	0.486	0.310	0.759	1.2	0.8	0.5
South Asia	0.410	0.367	0.695	1.1	0.9	0.6
Western Hemisphere	12.047	13.607	24.710	39.6	26.3	27.8
North America	9.396	10.486	19.549	31.3	20.8	21.8
Canada	4.978	5.481	10.350	16.6	11.0	11.4
Mexico	4.416	5.005	9.197	14.7	9.8	10.4
Caribbean	0.959	1.066	1.848	3.0	1.9	2.1
Central America	0.758	0.895	1.511	2.4	1.6	1.8
South America	0.935	1.161	1.802	2.9	2.0	2.1
Brazil	0.115	0.136	0.220	0.4	0.3	0.3
Colombia	0.302	0.414	0.598	1.0	0.7	0.8
Venezuela	0.181	0.251	0.351	0.6	0.3	0.4
Europe/Eurasia	5.097	4.928	8.601	13.8	8.7	8.4
European Union-25 2/	4.260	4.032	6.932	11.1	6.8	6.6
Other Europe 3/	0.222	0.282	0.468	0.8	0.5	0.6
FSU-12 4/	0.614	0.614	1.201	1.9	1.4	1.2
Russia	0.430	0.514	0.901	1.4	0.9	1.1
Middle East	1.514	1.522	2.879	4.6	3.0	2.9
Turkey	0.533	0.487	1.022	1.6	1.1	0.9
Saudi Arabia	0.180	0.188	0.345	0.6	0.4	0.4
Africa	1.390	1.505	2.668	4.3	2.8	3.0
North Africa	0.736	0.751	1.273	2.0	1.4	1.4
Egypt	0.457	0.483	0.808	1.3	0.8	0.9
Sub-Saharan Africa	0.654	0.754	1.395	2.2	1.4	1.6
Oceania	0.382	0.364	0.745	1.2	0.9	0.7
Transshipments via Canada 5/	0.140	0.120	0.242	0.4	0.2	0.1
Total	32.933	35.479	62.385	100.0	64.5	67.0

Total may not add due to rounding.

1/ Projections are based primarily on trend or recent average growth analysis.

2/ The former EU-15 plus 10 new states that acceded in May 2004.

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

4/ The Former 15 Republics of the Soviet Union minus the three Baltic Republics.

5/ Transshipments through Canada have not been allocated to final destinations after 1999, but are included in the total.

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

Import Products

The forecast for U.S. agricultural imports in fiscal year 2006 is raised to \$65 billion—a \$1.5-billion boost from February. This jump is attributed largely to higher-than-expected imports of fresh or frozen vegetables, raw and refined sugar, and cattle and calves in both value and volume. The recent depreciation of the dollar is expected to push up import prices in the second half of the current fiscal year. In addition, higher petroleum and other fuel prices increase transport and production costs of imports. These factors are already evident in imported processed vegetables, tree nuts, and dairy products as their volumes declined and prices rose from last year. However, the strong U.S. economy is expected to more than offset higher import costs and keep overall import volumes up.

Imports of fresh or frozen fruit climbed 16 percent in value in the first half of fiscal 2006 as their import prices rose 18 percent. The leading imports are berries, pineapples, grapes, and bananas. Except for strawberries, prices of all imported fruit were up compared with last year. Processed fruit and fruit juices were up in both volume and price. Orange juice import prices were 15 percent higher, while prices of imported apple juice fell significantly.

By contrast, imports of tree nuts were down 11 percent in volume in the first half of fiscal 2006. Cashew nuts, pecans, and macadamias posted lower volumes and prices than in 2005. But imported fresh and frozen vegetables registered healthy gains in volume and price, including tomatoes, potatoes, and cucumbers. An additional \$500 million in vegetable imports is projected to arrive in the current fiscal year. Among all horticulture or produce imports, vegetables are the most seasonal—56 percent of value arrives during the first half of the fiscal year, and 44 percent in the second half. Tree nuts are the next-highest seasonal imports, as they are consumed more in the winter months and during the holidays.

Beef import volume is unchanged at 1.1 million metric tons for 2006, but value is raised to near \$3.7 billion. Stronger import prices for beef, particularly South American beef, raise the value for beef imports. Shipments from New Zealand have only partially offset lower shipments from Australia and Canada so far in fiscal 2006. Pork shows strong gains thus far, particularly for fresh and frozen pork. Similarly, import demand for mutton, goat, and lamb meat, as well as variety meats, is robust, registering double-digit gains from 2005.

Appreciation of the euro and the Canadian dollar has caused import volumes of cheese, casein, and processed vegetables such as olives to fall. Also, imported confections, cocoa, and coffee products have weaker or flat gains thus far this year. Subdued U.S. demand for other imports from Europe and Canada are likely to follow, such as for wine, beer, olive oil, grain products, and processed fruit and vegetables.

U.S. purchases of sugar, especially of cane sugar from Mexico, are up sharply due to storm damage from last summer to cropland and refining capacity in Louisiana. World sugar prices are also significantly higher this year, due largely to curtailed supply from Brazil, Thailand, and other suppliers. Moreover, higher fuel prices have raised production and refining costs, as well as transport costs of raw and refined sugar. Lower U.S. domestic supply, and a higher tariff rate quota, also plays a role in boosting world sugar prices. Brazil's domestic use of cane sugar for

ethanol production tightened its own supply and export volume. U.S. import prices for sugar are at levels comparable to 1995 when they exceeded 24 cents per pound.

The import forecast for vegetable oils was raised to reflect greater rapeseed, coconut, and palm oil purchases, and continued strong demand for olive oil despite higher prices. Coconut and rapeseed oil prices are lower, thereby raising import volumes. The new U.S. labeling requirements that mandate disclosure of transfat content in foods in 2006 increased imports of palm oil by food manufacturers. As an alternative to hydrogenated oils and to transfat-containing oils such as coconut and palm kernel, imports of palm oil have more than doubled so far in 2006. In total, U.S. import volume of vegetable oils jumped 38 percent in volume, and 28 percent in value, during the first half of 2006.

Most farm commodity prices are higher in the first half of 2006 than the last half of 2005, such as for olive oil, bananas, cocoa, coffee, and rubber. Natural rubber prices are 20 percent higher than in late 2005 as world demand continues to outstrip supply. The combination of depreciation of the dollar, higher petroleum costs, and higher commodity prices are likely to affect U.S. consumer demand for high-value import products.

Table 4--U.S. agricultural imports: Value and volume by commodity, 2005-2006

Commodity	October-March		Fiscal year 2005	Forecast Fiscal year 2006	
	2005	2006		Feb.	May
	VALUE --- Billion dollars ---				
Livestock and products	5.507	6.245	11.139	11.6	12.2
Live animals, except poultry	0.778	1.505	1.577	2.2	2.5
Red meat and products	2.745	2.675	5.717	5.4	5.7
Beef and veal	1.777	1.691	3.772	3.5	3.7
Dairy products	1.354	1.409	2.609	2.7	2.7
Grains and feeds	2.200	2.452	4.429	4.8	4.9
Grain products	1.620	1.752	3.262	3.5	3.5
Oilseeds and products	1.346	1.629	2.947	3.2	3.4
Vegetable oils	1.056	1.354	2.368	2.7	2.9
Horticulture products	12.985	14.131	25.794	28.2	28.3
Fruits--fresh and frozen	2.324	2.706	4.486	5.2	5.2
Fruits--prepared or preserved, and juices	1.027	1.119	2.170	2.4	2.4
Nuts and preparations	0.662	0.558	1.194	1.3	1.1
Vegetables--fresh and frozen	2.516	2.912	4.499	4.7	5.2
Vegetables--prepared or preserved	1.530	1.590	3.044	3.2	3.2
Wine	1.812	1.930	3.691	4.0	4.0
Malt beer	1.305	1.518	2.994	3.5	3.5
Essential oils	1.089	1.066	2.335	2.4	2.3
Cut flowers and nursery stock	0.721	0.733	1.380	1.5	1.4
Sugar and related products	1.051	1.477	2.306	2.8	3.2
Confections	0.556	0.557	1.158	1.3	1.2
Cocoa and products	1.373	1.369	2.633	3.1	2.7
Coffee and products	1.270	1.492	2.828	3.4	3.3
Natural rubber and gums	0.750	0.920	1.505	1.7	1.9
Spices, natural drugs, tea	0.729	0.836	1.494	1.8	1.7
Tobacco, seeds, other veg. products	0.767	0.927	1.571	1.7	1.9
Other beverages	0.502	0.660	1.073	1.3	1.4
Total agricultural imports	28.478	32.138	57.716	63.5	65.0
VOLUME --- Million metric tons ---					
Wine 1/	3.441	3.765	7.070	7.6	7.7
Malt beverages 1/	12.786	14.364	29.301	32.0	33.0
Cattle and calves 2/	0.803	1.497	1.494	2.2	2.3
Beef and veal	0.573	0.530	1.218	1.1	1.1
Dairy products 3/	0.188	0.172	0.356	0.4	0.4
Grains and products	2.380	2.526	4.636	4.8	4.9
Fruits--fresh and frozen	4.172	4.108	8.189	8.4	8.2
Fruits--prepared or preserved 4/	0.520	0.575	1.064	1.1	1.2
Nuts and preparations	0.188	0.166	0.344	0.4	0.3
Vegetables--fresh and frozen	2.888	3.092	4.958	5.3	5.3
Vegetables--prepared or preserved 4/	0.708	0.653	1.387	1.4	1.4
Vegetable oils	0.967	1.332	2.230	2.6	2.8
Sugar and related products	1.237	2.020	2.788	4.1	4.6
Cocoa and products	0.653	0.656	1.238	1.6	1.3
Coffee and products	0.683	0.648	1.318	1.4	1.3

Totals may not add due to rounding.

1/ Liquid products are measured in million hectoliters. 2/ Million heads. 3/ Cheese, casein, and butter. 4/ Excludes juices.

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

Regional Imports

As U.S. food and agriculture imports shift gradually in favor of processed foods, beverages, and other high-value products, the market share of their sources shift as well. Although more than half of U.S. agricultural import value comes from the Western hemisphere, gains by the EU-25 in recent years come at the expense of Canada. Also, the growing share of the U.S. market claimed by China, Australia, and New Zealand is at the expense of other Southeast Asian countries. In the Western hemisphere, Mexico is supplanting market share losses by Canada, Central and South America. Only Chile is gaining or at least maintaining its share of the U.S. market, attributed in large part to its off-season produce exports.

Based on market share, the competition to supply agricultural products to the United States appears to have few gainers and many losers. Among the losers are many countries in Africa, the Middle East, Eurasia, and Asia. Distance to U.S. ports becomes an important factor because of transport costs. Also, year-round demand by Americans for produce gives suppliers in the Southern Hemisphere (Chile, Argentina, Australia, New Zealand, and South Africa) a key advantage during the U.S. winter months. The level of technology available to produce processed foods and beverages is another factor. This level of technology is more common in developed countries such as Europe and Canada.

While developing countries have a competitive disadvantage in producing processed foods and beverages, this makes them better prospects and candidates for free trade agreements with the U.S. As witnessed recently in Central America and the Dominican Republic, a free trade agreement with the U.S. provides export opportunities as well as incentives for inflows of foreign direct investment. The prime example for developing countries is Mexico, whose membership in NAFTA expanded its market by more than 300 million consumers. Besides Central America, the U.S. has signed free trade agreements with Chile, Israel, Jordan, Malaysia, Singapore, Australia, Morocco, Bahrain, Oman, and South Africa. Other free trade agreements are being negotiated with Thailand, South Korea, and the United Arab Emirates. In addition, trade promotion agreement discussions are ongoing with Colombia and Peru.

Outside of NAFTA, imports from countries with bilateral free trade agreements with the U.S. amounted to \$7.8 billion in fiscal 2005, or 14 percent of total U.S. agricultural imports, twice the level of a decade ago. This trend of free U.S. access to more foreign agricultural production and markets expands both export and import opportunities for American farmers and food manufacturers.

Table 5--U.S. agricultural imports: Value by region, 2005-2006

Region and country	October-March		Fiscal year 2005	Share of total 2005	Forecast	
	2005	2006			Fiscal year 2006	
	--- Billion dollars ---			Percent	--- Billion dollars ---	
					Feb.	May
Western Hemisphere	14.794	17.424	29.843	51.7	33.0	35.1
Canada	5.678	6.567	11.817	20.5	13.0	13.7
Mexico	4.063	4.983	8.097	14.0	8.6	9.9
Central America	1.147	1.326	2.465	4.3	2.9	2.8
Costa Rica	0.419	0.539	0.880	1.5	1.1	1.1
Guatemala	0.387	0.425	0.895	1.5	1.0	1.0
Other Central America	0.341	0.362	0.690	1.2	0.8	0.7
Caribbean	0.147	0.194	0.360	0.6	0.5	0.5
South America	3.759	4.354	7.104	12.3	8.0	8.2
Brazil	0.876	1.106	1.838	3.2	2.1	2.3
Chile	0.999	1.091	1.531	2.7	1.7	1.7
Colombia	0.698	0.777	1.379	2.4	1.6	1.5
Other South America	1.185	1.380	2.357	4.1	2.6	2.7
Europe and Eurasia	6.847	7.064	13.703	23.7	14.2	14.2
European Union-25	6.584	6.816	13.236	22.9	13.6	13.7
Other Europe	0.238	0.221	0.421	0.7	0.5	0.4
Asia	3.860	4.438	8.023	13.9	9.0	9.2
East Asia	1.285	1.447	2.662	4.6	3.1	3.0
China	0.850	0.990	1.790	3.1	2.1	2.1
Other East Asia	0.435	0.457	0.873	1.5	1.0	0.9
Southeast Asia	2.080	2.460	4.377	7.6	4.8	5.2
Indonesia	0.758	0.942	1.604	2.8	1.8	2.0
Thailand	0.545	0.614	1.086	1.9	1.1	1.2
Other Southeast Asia	0.777	0.903	1.687	2.9	1.9	2.0
South Asia	0.495	0.531	0.984	1.7	1.1	1.1
India	0.452	0.486	0.902	1.6	1.0	1.0
Oceania	1.949	2.094	4.177	7.2	4.8	4.5
Australia	1.124	1.190	2.487	4.3	2.6	2.6
New Zealand	0.784	0.852	1.618	2.8	2.1	1.8
Africa	0.682	0.717	1.330	2.3	1.8	1.4
Sub-Sahara	0.628	0.629	1.205	2.1	1.6	1.2
Ivory Coast	0.350	0.310	0.565	1.0	0.8	0.6
Middle East	0.346	0.401	0.641	1.1	0.7	0.7
Turkey	0.193	0.234	0.360	0.6	0.5	0.4
World total	28.478	32.138	57.716	100.0	63.5	65.0

Totals may not add due to rounding.

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

Reliability Tables

Table 6--Reliability of May U.S. export projections, by commodity, assorted fiscal years

Commodity	Fiscal year	Differences between May projections and final data						
		Average	Average	Max below	Max above	Below	Equal	Above
VALUE		Percent	-----Billion dollars-----			Number of years		
Grains and feeds	1982-05	4.3	0.6	-1.1	2.0	3	0	21
Wheat	1/	NA	NA	NA	NA	NA	NA	NA
Rice	1982-05	5.6	0.0	-0.1	0.1	8	12	4
Coarse grains	1982-05	5.4	0.3	-1.0	1.1	8	5	11
Corn	1982-05	4.9	0.3	-1.0	0.8	6	8	10
Feeds and fodders	1993-05	6.1	0.2	-0.3	0.3	6	1	6
Oilseeds and products	1982-05	8.9	0.8	-1.8	0.1	22	1	1
Soybeans	1982-05	4.5	0.2	-0.5	0.7	15	4	5
Soybean meal	1982-05	7.1	0.1	-0.4	0.2	13	9	2
Soybean oil	1982-05	11.3	0.0	-0.1	0.1	4	14	6
Livestock products	1982-05	4.3	0.3	-0.8	0.7	10	5	9
Beef and veal	1/	NA	NA	NA	NA	NA	NA	NA
Pork	1/	NA	NA	NA	NA	NA	NA	NA
Beef and pork variety meats	1/	NA	NA	NA	NA	NA	NA	NA
Hides and skins, incl. furs	1993-05	3.0	0.0	-0.1	0.1	4	7	2
Poultry and products	1982-05	4.3	0.1	-0.3	0.2	6	14	4
Broiler meat	2002-05	6.0	0.1	-0.2	0.1	1	1	2
Dairy products	1982-05	8.7	0.1	-0.2	0.2	6	12	6
Tobacco, unmanufactured	1982-05	6.8	0.1	-0.2	0.2	7	7	10
Cotton and linters	1982-05	7.2	0.2	-0.3	0.5	5	5	14
Seeds	1982-05	5.7	0.0	-0.2	0.1	3	16	5
Horticultural products	1982-05	4.9	0.3	-0.7	0.3	16	3	5
Fruits and preparations	1993-05	2.2	0.1	-0.1	0.2	3	4	6
Vegetables and preparations	1993-05	2.2	0.1	-0.1	0.1	3	5	5
Tree nuts and preparations	1993-05	3.9	0.1	-0.2	0.1	3	7	3
Sugar and tropical products	1982-05	35.9	0.2	-0.2	1.1	3	6	15
Major bulk	1999-05	1.7	0.4	-0.8	0.2	6	0	1
Total ag. exports	1982-05	2.5	1.0	-3.1	2.9	15	1	8
VOLUME		Percent	-----Million metric tons-----			Number of years		
Wheat	1982-05	5.0	1.5	-4.0	6.5	11	1	12
Rice	1982-05	7.9	0.2	-0.7	0.2	17	3	4
Coarse grains	1982-05	4.9	2.6	-7.2	7.1	11	0	13
Corn	1983-05	5.0	2.3	-7.1	5.2	12	0	12
Feeds and fodders	1982-05	4.6	0.5	-1.2	1.5	10	2	12
Oilseeds and products	1993-05	2.8	1.0	-2.9	0.6	10	0	3
Soybeans	1982-05	4.0	0.9	-2.3	2.0	13	1	10
Soybean meal	1982-05	6.8	0.4	-1.3	0.9	18	2	4
Soybean oil	1982-05	12.0	0.1	-0.2	0.3	10	9	5
Beef, pork, & variety meats	1982-05	3.3	0.0	-0.2	0.1	6	15	3
Beef and veal	1/	NA	NA	NA	NA	NA	NA	NA
Pork	1/	NA	NA	NA	NA	NA	NA	NA
Beef and pork variety meats	1/	NA	NA	NA	NA	NA	NA	NA
Broiler meat	2003-05	3.0	0.1	-0.1	0.1	1	1	2
Tobacco, unmanufactured	1982-05	8.3	0.0	0.0	0.1	0	16	2
Cotton and linters	1982-05	8.4	0.1	-1.0	0.2	6	10	8
Major bulk	1993-05	2.7	3.1	-8.6	4.6	7	0	6

1/ First projection in August 2006. NA=not available.

Table 7--Reliability of May U.S. export value projections, by country, assorted fiscal years

Country/region	Fiscal years	Differences between May projections and final data						
		Average	Average	Max below	Max above	Below	Equal	Above
		Percent	-----Billion dollars-----			Number of years		
Asia	1982-05	7.2	1.3	-2.9	3.5	13	1	10
East Asia	2005	7.6	1.4	-1.4	-1.4	1	0	0
Japan	1982-05	5.2	0.4	-1.1	0.8	12	3	9
China	1982-05	32.2	0.4	-1.2	1.1	9	3	12
Hong Kong	1988-05	7.0	0.1	-0.2	0.2	4	8	6
Taiwan	1988-05	7.2	0.1	-0.5	0.4	10	5	3
South Korea	1988-05	8.9	0.3	-0.9	0.9	6	3	9
Southeast Asia	1985-87 & 1996-05	9.5	0.2	-0.5	0.4	7	1	5
Indonesia	1999-05	11.9	0.1	-0.2	0.1	4	2	1
Philippines	1988-05	12.2	0.1	-0.2	0.1	7	9	2
Malaysia	1999-05	7.4	0.0	0.0	0.0	0	7	0
Thailand	1999-05	10.7	0.1	-0.1	0.1	4	2	1
South Asia	1982-87 & 1996-05	20.5	0.1	-0.3	0.4	5	2	9
Western Hemisphere	2005	4.5	1.1	-1.1	-1.1	1	0	0
North America	2005	4.3	0.8	-0.8	-0.8	1	0	0
Canada	1982-05	6.0	0.2	-1.5	0.4	14	3	7
Mexico	1982-05	14.1	0.5	-1.2	1.0	15	0	9
Caribbean	2002-05	8.5	0.1	-0.2	0.1	2	1	1
Central America	2002-05	3.6	0.0	-0.1	0.1	1	2	1
South America	1982-87 & 2002-05	10.5	0.2	-0.2	0.5	4	1	5
Brazil	1988-05	30.5	0.1	-0.1	0.2	6	6	6
Colombia	2002-05	9.7	0.1	-0.1	0.0	2	2	0
Venezuela	1988-05	14.1	0.1	-0.2	0.1	5	9	4
Europe/Eurasia	2005	1.1	0.1	0.1	0.1	0	0	1
European Union-25 1/	2005	1.0	0.0	0.0	0.0	0	1	0
FSU-12 2/	2005	8.2	0.1	0.1	0.1	0	0	1
Russia	1995-05	31.5	0.2	-0.2	0.6	5	1	5
Middle East	1982-05	13.2	0.3	-0.5	0.6	10	0	14
Turkey	1999-05	16.7	0.1	-0.1	0.2	4	0	3
Saudi Arabia	1988-05	12.2	0.1	-0.1	0.1	5	8	5
Africa	1997-05	9.3	0.2	-0.5	0.4	11	2	11
North Africa	1982-05	8.7	0.1	-0.3	0.5	9	6	9
Egypt	1988-05	9.6	0.1	-0.3	0.2	5	5	8
Sub-Sahara	1982-05	16.2	0.1	-0.4	0.2	13	2	9
Oceania	1982-05	12.6	0.1	-0.3	0.1	7	14	3
World	1982-05	4.4	1.8	-6.1	4.3	14	1	9

1/ The EU is now defined as EU-25; past estimates were for EU-6, EU-9, EU-10, EU-12, and EU-15. 2/ The former Soviet Union is now defined as FSU-12 and excludes the Baltic States; past estimates were for USSR or FSU-15.

Table 8--Reliability of May U.S. import projections, by commodity, assorted fiscal years

Commodity	Fiscal years	Differences between May projections and final data							
		Avg.	Avg.	Max below	Max above	Below	Equal	Above	
VALUE		Percent	-----Billion dollars-----				Number of years		
Livestock and products	1986-05	3.7	0.3	-1.4	0.6	8	5	6	
Live animals, except poultry	1982-05	8.5	0.1	-0.4	0.2	10	7	7	
Red meats and products	1982-86 & 96-05	5.1	0.2	-0.7	0.4	6	5	4	
Beef and veal	1986-96 & 2004-05	9.8	0.2	-0.7	0.6	3	3	5	
Dairy products	1986-05	6.3	0.1	-0.2	0.3	10	7	2	
Grains and feeds	1987-05	4.5	0.1	-0.2	0.2	8	6	5	
Grain products	2004-05	0.0	0.0	0.0	0.0	0	2	0	
Oilseeds and products	1983-05	6.7	0.1	-0.3	0.3	7	10	7	
Vegetable oils	2005	4.2	0.1	0.1	0.1	0	0	1	
Horticulture products	1987-05	2.7	0.3	-0.9	0.9	10	3	6	
Fruits, fresh and frozen	2004-05	4.6	0.2	-0.2	-0.1	2	0	0	
Fruits, prep. or pres., & juices	2004-05	2.8	0.0	0.0	0.1	0	1	1	
Nuts and preparations	1987-05	7.3	0.0	-0.1	0.2	1	12	6	
Vegetables, fresh and frozen	2004-05	1.1	0.0	-0.1	0.0	1	1	0	
Vegetables, prep. or pres.	2004-05	1.7	0.1	0.0	0.1	0	1	1	
Wine	2004-05	3.0	0.1	0.0	0.2	0	1	1	
Malt beverages	2004-05	5.2	0.2	-0.1	0.2	1	0	1	
Essential oils	2004-05	7.7	0.2	-0.2	0.1	1	0	1	
Nursery stock & cut flowers	1996-05	2.8	0.0	-0.1	0.1	1	7	2	
Sugar and related products	1983-05	7.8	0.1	-0.3	0.3	12	6	6	
Cocoa and products	1982-05	4.3	0.1	-0.2	0.1	4	13	7	
Coffee and products	1982-05	5.9	0.2	-0.5	0.6	6	8	10	
Natural rubber and gums	1982-05	9.0	0.1	-0.3	0.2	4	9	11	
Spices, natural drugs, tea	2003-05	10.8	0.2	-0.2	0.2	2	0	1	
Total agricultural imports	1983-05	2.5	0.7	-1.9	1.2	17	2	5	
VOLUME		Percent	-----Million metric tons-----				Number of years		
Wine (HL)	1982-86 & 2004-05	64.1	3.2	-4.7	0.0	6	1	0	
Malt beverages (HL)	2004-05	1.7	0.5	-0.8	0.2	1	0	1	
Cattle & calves	2004-05	20.0	0.3	-0.2	0.4	1	0	1	
Beef & veal	1987-95 & 2005	5.2	0.0	-0.1	0.1	3	6	1	
Dairy products	1987-92 1/	47.8	0.1	-0.1	0.2	4	0	2	
Grains and products	1995-05	3.6	0.2	-0.2	0.4	3	1	7	
Fruits, fresh and frozen	2004-05	1.4	0.1	-0.1	0.0	1	1	0	
Fruits, prep. or pres.	2/	NA	NA	NA	NA	NA	NA	NA	
Nuts & preparations	1987-05	10.8	0.0	-0.1	0.1	2	14	1	
Vegetables, fresh & frozen	1993-96 & 2002-05	2.9	0.1	-0.2	0.1	4	3	1	
Vegetables, prep. or pres.	2/	NA	NA	NA	NA	NA	NA	NA	
Vegetable oils	1983-86 & 2002-05	5.1	0.1	-0.3	0.2	2	4	3	
Sugar and related prod.	2004-05	13.4	0.4	-0.5	-0.3	2	0	0	
Cocoa beans & products	1984-05	8.4	0.1	-0.1	0.1	7	8	7	
Coffee & products	1984-05	7.6	0.1	-0.2	0.5	5	11	6	

HL = Million hectoliters. NA=not available.

1/ Continued in 2006. 2/ First projection in August 2006.

Table 9--Reliability of May U.S. import value projections, by country, assorted fiscal years

Country/region	Fiscal year	Differences between May projections and final data						
		Average	Average	Max below	Max above	Below	Equal	Above
		Percent	-----Billion dollars-----			Number of years		
Western Hemisphere	2004-05	3.2	0.9	-1.7	0.0	1	1	0
Canada	1995-05	4.5	0.3	-0.9	0.4	12	2	2
Mexico	1995-05	2.9	0.1	-0.3	0.4	6	5	5
Central America	1999-05	4.4	0.1	-0.2	0.1	4	2	2
Costa Rica	1999-05	2.7	0.0	-0.1	0.0	1	6	0
Caribbean	2000-05	11.3	0.0	-0.1	0.1	1	4	1
South America	2002-05	3.9	0.2	-0.3	0.3	3	0	1
Brazil	1995-05	13.3	0.2	-0.5	1.2	7	3	6
Chile	1996-05	7.2	0.1	-0.1	0.1	1	2	4
Colombia	1999-05	3.3	0.0	0.0	0.1	0	7	1
Europe and Eurasia	2005	2.2	0.3	0.3	0.3	0	0	1
European Union-25 1/	2005	1.2	0.2	0.2	0.2	0	0	1
Asia	1995-05	4.2	0.2	-0.6	0.7	6	4	6
East Asia	2004-05	18.5	0.5	-0.9	0.0	1	1	0
China	1995-05	6.1	0.0	-0.1	0.1	3	12	1
Southeast Asia	1996-05	3.6	0.1	-0.4	0.2	1	4	5
Indonesia	1999-05	5.6	0.1	-0.1	0.1	2	3	2
Thailand	1999-05	8.5	0.1	-0.1	0.1	2	3	3
South Asia	1996-05	11.3	0.1	-0.1	0.2	4	3	2
Oceania	1995-05	4.1	0.1	-0.3	0.1	5	8	3
Australia	1999-05	2.5	0.0	-0.1	0.1	2	4	1
New Zealand	1999-05	6.3	0.1	-0.1	0.2	1	3	3
Africa	1995-05	7.1	0.1	-0.1	0.1	6	8	2
Ivory Coast	1999-05	20.5	0.1	-0.1	0.2	1	5	2
Middle East	1995-05	15.2	0.1	-0.4	0.3	3	9	3
Turkey	1999-05	9.1	0.0	0.0	0.1	0	6	1
World	1995-05	2.5	0.8	-1.9	1.2	11	1	4

1/ The European Union is now defined as EU-25; past estimates were for EU-6, EU-9, EU-10, EU-12, and EU-15.

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

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