



Outlook for U.S. Agricultural Trade

FY 2011 Exports, Imports, and Trade Surplus Projected At Record Highs

Fiscal 2011 agricultural exports are forecast at a record \$126.5 billion, up \$13.5 billion from the August forecast and \$17.8 billion above final 2010 exports. Exports are forecast to exceed the previous record set in 2008 by more than \$11.5 billion. Sharply higher unit values for leading export commodities account for most of the forecast increase in value.

Soybean exports are forecast up more than \$5 billion from the August forecast due to higher unit values along with strong demand from key markets such as China. Grains are up nearly \$4 billion due mostly to higher corn and wheat export unit values. Wheat exports are also expected to benefit from reduced export competition. Cotton exports are forecast up \$2 billion mostly on higher unit values as U.S. and global stocks tighten. Beef exports are forecast up on strong Asian demand while horticultural exports are expected down slightly. Asia accounts for more than half of the increased forecast, with China up more than any other market (\$2.5 billion) to \$17.5 billion and only half a billion less than the top market of Canada.

The import forecast for 2011 is moved up to \$85.5 billion, an 8.2-percent increase over 2010. Consumer spending for food and beverages has climbed recently, as has disposable personal income. The projected import growth in 2011 reflects about 2-3 percent volume gain and 6 percent increase in import unit values. Major commodities inflating the U.S. import bill include coffee beans, cocoa beans, coconut oil, palm oil, rubber, and sugar.

Table 1--U.S. agricultural trade, fiscal years 2006-2011, year ending September 30

Item	2006	2007	2008	2009	2010	Forecast	
						Aug.	Nov.
<i>Billion dollars</i>							
Exports	68.6	82.2	114.9	96.3	108.7	113.0	126.5
Imports	64.0	70.1	79.3	73.4	79.0	81.5	85.5
Balance	4.6	12.1	36.0	23.0	29.7	31.5	41.0

Reflects forecasts in the November 9, 2010, *World Agricultural Supply and Demand Estimates* report.

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

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Approved by the
World Agricultural
Outlook Board.

Outlook for Modest Dollar Depreciation

The world macroeconomic outlook for 2011, as summarized in the table below, both supports and depends on increasing U.S. exports in general and U.S. farm exports in particular. World trade volume of 2010 is expected to have risen 14.6 percent—almost enough to turn around the shrinking of trade in 2009. In 2011 world trade is expected to grow 7.5 percent.

The 2011 world macroeconomic outlook for growth and exchange rates is beset by uncertainty. First, the effects and effectiveness of the new U.S. Federal Reserve Board program of quantitative easing (QEII) on domestic and world growth prospects is difficult to determine. Second, sovereign debt problems in the eurozone pose a threat to European growth rates. Finally, as China acts to constrain inflation by tightening credit, the impact on growth in China and the rest of Asia remains uncertain.

Some U.S. trading partners worry that the Fed program of buying up more long term treasury bonds will cause the dollar to take a sharp dive. Professional forecasters, while seeing the QEII as a positive stimulus in the near-term, express some concern that QEII will only modestly boost U.S. growth in 2011 and may hinder longer-term prospects. The exchange rate markets seemed to believe the professional forecasters, as the dollar has appreciated 3.7 percent against the yen and 4.3 percent against the euro since QEII was announced.

Some of the dollar appreciation against the Euro will recede in the short-term, if the markets see the bailout of Ireland as a second chapter of the Greek bailout that will likely succeed. The bailout and concerns about European debt may curtail near-term European growth and bring a stronger dollar relative to the euro instead of the forecasted modestly weaker dollar.

If Chinese growth falters, as the banking authorities curtail credit to Chinese state owned enterprises to slow inflation, it may hamper exports. If that happens, growth for much of Asia could slow as well, damping world trade and GDP growth.

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

(11/10/2010) Region/country	Share of World	Real Income Per Capita			Current Account		Real Exch Rate 2/		CPI	
	GDP (2010)	2010	2001-10	2011	2001-100	2011	2001-10	2011	2001-10	2011
		Growth rate			Share of GDP		Growth rate		Growth rate	
	<i>Percent</i>	<i>Dollars</i>	<i>Percent change</i>		<i>Percent</i>		<i>Percent change</i>			
World	100.0	7,556	1.1	2.1	--	--	--	--	2.9	2.8
NAFTA	30.6	39,629	0.6	1.8	-3.9	-2.9	-1.5	-3.2	2.4	1.8
Canada	2.6	37,262	1.0	2.9	0.7	-1.7	-3.0	-2.4	2.0	2.0
United States	26.4	41,890	0.6	1.6	-4.6	-3.1	0.0	0.0	2.4	1.6
Mexico	1.6	7,075	0.1	3.5	-1.1	-2.1	1.0	-4.3	4.6	3.9
Latin America + Caribbean	6.5	15,972	1.5	3.5	-0.1	-1.1	0.0	-1.3	6.7	7.6
Argentina	0.5	5,411	3.0	3.2	3.2	0.5	12.8	0.9	9.7	10.7
Brazil	2.4	5,656	1.7	4.2	-0.6	-1.9	-3.5	0.8	6.7	4.4
Europe	29.9	26,912	1.0	1.4	0.2	0.2	-2.6	8.0	2.2	1.8
Asia and Oceania	26.6	3,320	2.9	3.9	3.3	2.9	-0.6	-3.6	1.9	2.4
China	7.5	2,557	9.3	8.1	5.8	4.2	-1.4	-6.3	1.9	3.2
Japan	8.7	33,074	0.5	1.7	3.4	3.5	0.8	-0.9	-0.3	-0.6
Korea	2.0	19,702	3.5	3.5	1.9	4.9	0.0	-5.3	3.2	3.6
Indonesia	0.8	1,546	3.8	5.1	2.0	0.2	-4.6	-7.5	8.6	5.8
Vietnam	0.1	775	5.9	5.8	-4.9	-7.0	-2.1	-3.5	6.6	7.3
India	2.3	902	5.7	6.8	-0.7	-2.7	-3.2	-4.0	6.2	7.0
Australia	1.6	37,292	1.7	2.1	-4.6	-3.2	-4.4	-6.3	3.0	2.6
New Zealand	0.2	25,036	1.3	1.4	-5.9	-6.4	-4.6	-9.3	2.6	4.5
Middle East	3.2	5,395	2.1	3.3	9.8	8.0	-4.4	-3.7	8.1	8.2
Turkey	0.8	4,775	1.9	3.7	-3.4	-5.5	-4.2	-4.3	18.9	5.2
Africa	2.4	1,159	2.2	2.8	3.4	0.6	-2.7	-4.3	7.1	6.6

-- = Not available.

1/ Real values have a 2005 base. 2/ Local currency per U.S. dollar. A negative value implies a depreciation of the U.S. dollar.

Source: Compiled by ERS using data from the IMF and Global Insight.

Export Products

The fiscal 2011 forecast for grain and feed exports is raised \$3.9 billion from August to \$35.4 billion, the second highest on record. Most of the increase is due to higher forecasts for coarse grain and wheat values along with greater wheat volumes. Corn is raised \$1.7 billion to \$12.3 billion due to sharply higher unit values. Competitors such as Argentina, Brazil, and Ukraine should benefit from greater global demand, while tight U.S. supplies and higher values lower U.S. export volume. Meanwhile, sorghum exports are boosted \$300 million as a result of higher unit values on a reduced U.S. crop and stronger EU demand.

Wheat exports are up by \$1.7 billion to \$9.8 billion on sharply higher volumes and unit values. The combination of increased global demand and tight exportable supplies in other exporting countries, particularly Russia, provides opportunities for U.S. export expansion in key Mediterranean and North African markets. Rice is unchanged at \$2.3 billion as a shift between type and class counter the effect of higher unit values. Volume is raised just 100,000 tons to 4.4 million tons as increased long grain sales to Latin America are nearly offset by weaker medium grain shipments to the Pacific.

The fiscal 2011 forecast for oilseeds and products is increased to \$28.3 billion, up \$6.3 billion from the August forecast. Soybeans account for three-quarters of the increase as record early season sales and a dramatic rise in unit values adds \$5.1 billion to the export forecast. Soybean export volume is expected up 3.6 million tons from the previous forecast and is now forecast ahead of last year. Strong demand for soybeans should push unit values to near record levels with support spilling over into soybean product markets. Forecast meal exports are up \$550 million to \$3.2 billion on mostly higher unit values. The soybean oil export forecast is \$340 million higher on improved volume and unit value.

Fiscal 2011 cotton exports are up \$2 billion to \$8 billion due primarily to higher unit values. Despite increasing world demand and tighter foreign stocks, export volume is up only 100,000 tons to 3.4 million tons due to historically tight U.S. stocks. India has partially eased its ban on exports, but uncertainly regarding its export policy continues to put upward pressure on unit values. In China, less than expected carryover and a smaller crop have dramatically tightened supply. Buyers in China and other markets have sought to secure some of this limited supply through imports, thereby driving unit values up sharply.

The fiscal 2011 horticultural product export forecast is lowered \$200 million from the August forecast, but remains a record at \$24.3 billion. For most products, expanding exports compared to last year are due primarily to higher unit values, a driving force over the last several years. Fresh fruit and vegetable exports are forecast at \$6.2 billion, unchanged from August. Processed fruit and vegetable exports are forecast at \$5.9 billion, reduced \$300 million due mainly to slowing demand from Canada and Japan. Tree nut exports, both whole and processed, are forecast at \$4.3 billion, down \$200 million from August on weaker European demand for almonds.

The fiscal 2011 export forecast for livestock, poultry, and dairy is raised \$1.2 billion to \$23 billion, with gains in all but poultry. Beef exports are forecast at \$3.7 billion, up \$500 million on higher unit values and volumes. Despite lower beef production, strong Asian demand is expected to foster shipments. The export forecast for dairy

products is raised \$300 million as import demand remains robust and global unit values, particularly for butterfat, remain relatively strong. Pork exports are forecast to reach \$4.6 billion, up \$100 million, on higher unit values as demand remains firm in major markets. Modest gains are expected in hides and skins, raised \$300 million, as improving global economic conditions bolster demand. Escalating unit values for feed and lower cattle slaughter should support higher animal fat values, forecast \$300 million higher. Poultry product exports are forecast down \$300 million to \$4.7 billion, primarily on lower broiler meat unit values as domestic production expands.

Table 3--U.S. agricultural exports: Value and volume by commodity, 2007-2011

Commodity	Fiscal year				Forecast	
	2007	2008	2009	2010	fiscal 2011	
					Aug.	Nov.
VALUE	<i>Billion dollars</i>					
Grains and feeds 1/	24.304	38.326	26.278	27.285	31.5	35.4
Wheat 2/	6.579	12.332	5.997	5.868	8.1	9.8
Rice	1.279	2.016	2.250	2.322	2.3	2.3
Coarse grains 3/	9.783	15.750	9.982	9.843	11.4	13.3
Corn	8.933	13.999	9.279	9.096	10.6	12.3
Feeds and fodders	3.493	4.821	4.507	5.580	6.0	6.1
Oilseeds and products 4/	13.669	22.810	20.871	25.369	22.0	28.3
Soybeans	8.483	14.516	13.815	16.945	15.2	20.3
Soybean meal 5/	1.937	3.231	2.951	3.795	2.6	3.2
Soybean oil	0.608	1.532	0.855	1.347	1.0	1.3
Livestock, poultry, and dairy	16.361	21.768	18.625	21.535	21.8	23.0
Livestock products	10.121	12.808	11.521	13.547	13.9	15.1
Beef and veal 6/	1.899	2.683	2.688	3.220	3.2	3.7
Pork 6/	2.625	3.913	3.627	3.927	4.5	4.6
Beef and pork variety meats 6/	0.830	0.879	0.910	1.000	1.0	1.0
Hides, skins, and furs	2.161	2.131	1.507	2.117	2.0	2.3
Poultry and products	3.777	4.928	4.841	4.619	5.0	4.7
Broiler meat 6/ 7/	2.481	3.422	3.364	3.012	3.3	3.0
Dairy products	2.463	4.032	2.263	3.369	2.9	3.2
Tobacco, unmanufactured	1.143	1.280	1.199	1.221	1.2	1.2
Cotton	4.294	4.754	3.514	4.758	6.0	8.0
Seeds	0.943	1.166	1.247	1.232	1.3	1.3
Horticultural products 8/	18.020	20.792	20.634	22.610	24.5	24.3
Fruits and vegetables, fresh	4.786	5.508	5.414	5.859	6.2	6.2
Fruits and vegetables, processed 8/	4.399	5.369	5.379	5.613	6.2	5.9
Tree nuts, whole and processed	3.025	3.487	3.495	4.060	4.5	4.3
Sugar and tropical products 9/	3.471	4.004	3.879	4.571	4.8	5.0
Major bulk products 10/	31.561	50.648	36.757	40.957	44.1	55.0
Total	82.217	114.910	96.295	108.664	113.0	126.5
VOLUME	<i>Million metric tons</i>					
Wheat 2/	29.636	32.847	22.545	25.848	31.0	34.5
Rice	3.316	3.909	3.398	4.279	4.3	4.4
Coarse grains 3/	59.051	68.205	51.442	54.091	56.1	54.3
Corn	54.159	60.593	47.658	49.833	52.0	50.0
Feeds and fodders	11.677	14.475	13.830	18.779	20.0	19.3
Soybeans	30.309	30.784	34.947	41.770	39.1	42.7
Soybean meal 5/	7.987	8.384	7.708	10.137	8.1	8.3
Soybean oil	0.851	1.320	0.995	1.523	1.0	1.2
Beef and veal 6/	0.442	0.628	0.621	0.715	0.7	0.8
Pork 6/	1.004	1.525	1.382	1.429	1.6	1.6
Beef and pork variety meats 6/	0.506	0.609	0.684	0.711	0.7	0.7
Broiler meat 6/ 7/	2.576	3.107	3.107	2.961	3.0	3.0
Tobacco, unmanufactured	0.180	0.184	0.168	0.184	0.2	0.2
Cotton	3.104	2.957	2.737	2.682	3.3	3.4
Major bulk products 10/	125.595	138.886	115.237	128.854	134.0	139.5

Total may not add due to rounding.

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

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

Regional Exports

Revised outlook for fiscal 2011

Agricultural exports are forecast up \$13.5 billion from the August forecast with more than half (\$7.8 billion) of the increase coming in Asia and focused in China, Japan, South Korea, and Southeast Asia. Exports to NAFTA partners Mexico and Canada are up \$2.6 billion. North Africa and the Middle East account for most of the remaining increase.

Asia

U.S. agricultural exports to Asia in 2011 are forecast up 17 percent from the August forecast to \$54.8 billion. China is expected to be the largest importer in the region and second largest U.S. market overall at \$17.5 billion, which is just \$500 million less than forecast exports to Canada (the top market). Oilseeds are again expected to dominate the U.S. export product mix and account for more than half of all exports to China. Cotton demand is also expected to be strong on a reduced domestic crop, though higher unit values for both cotton and soybeans should account for most of the increase in export value.

Japan has been one of the slowest growing major U.S. markets over the past 10 years but the outlook is bright in 2011 with exports forecast up 13 percent. Grains and feeds make up nearly half of total exports and with unit values for both commodities up significantly, the overall forecast is raised \$1.5 billion. A recovery in consumer spending and higher unit values for soybeans and pork should also support export value. Exports to South Korea soared last year, increasing 30 percent over 2009, and the trend is expected to continue in 2011 with exports forecast up 20 percent. Grains and meat account for the majority of exports, and both demand and unit values for these products should be healthy.

Southeast Asia has been one of the fastest growing markets over the past 10 years and is forecast to reach a record \$9.1 billion in 2011. With rapid growth in middle income consumers, meat demand has taken off and resulted in increasing imports of soybeans, soybean meal, feed grains, and distillers dried grains. With strong economic growth expected in 2011, U.S. exports of these products are expected to grow. Higher unit values than last year for these products, along with cotton, should also support an increase in U.S. export value. Much of the growth will be focused in Indonesia, Vietnam, and Thailand. Wheat shipments are also expected to rise to the Philippines, which is the second largest market in Asia.

Western Hemisphere

Though China remains the fastest growing major market, Canada is expected to continue as the top market with exports forecast at a record \$18 billion. High unit values for grains, oilseeds, livestock, and meat support the forecast. Furthermore, a recovering economy is expected to support purchases of horticultural products, which account for more than 40 percent of U.S. exports to Canada. Despite this record forecast, exports to China are expected to grow by more than Canada in 2011 and narrow the gap between the top two U.S. markets. Exports to Mexico are forecast at a record \$16 billion on strong grain, pork, and oilseed demand and unit

values. Increased wheat exports should be a key driver behind exports due to reduced competition from Canada.

Europe, Africa, and the Middle East

Exports to Turkey increased 45 percent from 2009 to 2010 and are again expected to be strong in 2011, with a nearly 30 percent jump. Cotton accounts for nearly half of all exports to Turkey, and record high U.S. unit values and early-season sales indicate that shipments to Turkey this year could reach a record. Strong demand and values for oilseeds also support the record forecast of \$2.7 billion. As is the case with Turkey, exports to other Middle Eastern countries should be supported by high oilseed and cotton unit values along with reduced grain export competition from Russia and the Ukraine.

Reduced exportable grain supplies in Russia and Ukraine are expected to support U.S. wheat and corn sales to North Africa, with especially strong sales to Egypt. Though less impacted by the shortage in Black Sea grain supplies, exports to Sub Saharan Africa are up based, in part, on high U.S. wheat unit values. Nigeria accounted for 40 percent of all U.S. agricultural exports to the region last year and is expected to continue as the top market in 2011.

Table 4--U.S. agricultural exports: Value by region, 2007-2011

Country and region 1/	Fiscal year				Forecast fiscal 2011		Share of 2010 total
	2007	2008	2009	2010	Aug.	Nov.	
	<i>Billion dollars</i>				<i>Percent</i>		
Asia	29.392	43.228	37.628	45.736	47.0	54.8	42.1
East Asia	23.994	34.934	30.731	36.932	37.2	43.5	34.0
Japan	9.739	13.061	11.182	11.228	11.5	13.0	10.3
China	7.051	11.170	11.073	15.070	15.0	17.5	13.9
Hong Kong	1.082	1.598	1.737	2.460	2.5	3.3	2.3
Taiwan	2.917	3.509	2.889	3.174	3.2	3.7	2.9
South Korea	3.190	5.552	3.821	4.982	5.0	6.0	4.6
Southeast Asia	4.366	7.113	5.681	7.325	7.9	9.1	6.7
Indonesia	1.374	2.205	1.667	2.130	2.1	2.5	2.0
Philippines	0.963	1.730	1.247	1.606	1.7	1.8	1.5
Malaysia	0.508	0.631	0.562	0.778	0.8	0.9	0.7
Thailand	0.802	1.144	0.909	1.082	1.1	1.3	1.0
South Asia	1.031	1.181	1.216	1.479	1.9	2.2	1.4
Western Hemisphere	33.268	43.405	38.200	40.408	42.2	45.7	37.2
North America	25.592	31.443	28.865	30.497	31.4	34.0	28.1
Canada	13.261	16.257	15.540	16.566	16.8	18.0	15.2
Mexico	12.331	15.186	13.325	13.932	14.6	16.0	12.8
Caribbean	2.397	3.512	3.150	3.124	3.2	3.5	2.9
Central America	2.186	3.058	2.657	2.720	2.9	3.2	2.5
South America	3.094	5.392	3.528	4.066	4.7	5.0	3.7
Brazil	0.386	0.663	0.382	0.527	0.7	0.7	0.5
Colombia	1.124	1.757	0.955	0.829	0.9	1.0	0.8
Venezuela	0.518	1.451	1.050	1.072	1.0	1.2	1.0
Europe/Eurasia	9.813	13.509	9.919	10.255	10.6	11.1	9.4
European Union-27 2/	8.040	10.660	7.611	8.511	8.6	9.1	7.8
Other Europe 3/	0.331	0.517	0.549	0.374	0.5	0.5	0.3
FSU-12 4/	1.442	2.333	1.759	1.370	1.5	1.5	1.3
Russia	1.124	1.888	1.418	1.044	1.2	1.2	1.0
Middle East	4.219	6.925	4.863	5.597	6.0	6.9	5.2
Turkey	1.363	1.732	1.387	2.012	2.1	2.7	1.9
Saudi Arabia	0.536	0.978	0.686	0.836	0.9	1.0	0.8
Africa	4.338	6.363	4.286	4.967	5.5	6.4	4.6
North Africa	2.698	3.841	2.127	2.787	3.4	4.0	2.6
Egypt	1.685	2.199	1.421	1.583	1.7	2.0	1.5
Sub-Saharan Africa	1.640	2.523	2.159	2.180	2.1	2.4	2.0
Oceania	0.899	1.142	1.239	1.385	1.3	1.4	1.3
Trans-shipments via Canada 5/	0.288	0.336	0.160	0.315	0.2	0.2	0.3
Total	82.217	114.910	96.295	108.664	113.0	126.5	100.0

Total may not add due to rounding.

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

2/ The former EU-25 plus Romania and Bulgaria who acceded in January 2007.

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

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

5/ Trans-shipments through Canada have not been allocated to final destination, but are included in the total.

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

Import Products

Stronger than expected import demand in the last half of fiscal 2010 pushed total U.S. agricultural imports to \$79 billion, a 7.6-percent bounce from 2009. Import gains from April to September 2010 averaged 17 percent per quarter. Driven in part by this momentum, the forecast for 2011 is moved up to \$85.5 billion, an 8.2-percent increase. Consumer spending for food and beverages has climbed by 0.7 percent on average in the past six quarters. Disposable personal income during this period is up by an average 0.5 percent per quarter. At the same time, quarterly growth in world food prices has averaged 1.5 percent since the second quarter of 2009. This indicates that U.S. agricultural import value is being boosted by higher food commodity prices.

The major food commodity prices that are inflating the U.S. import bill include coffee beans, cocoa beans, coconut oil, palm oil, rubber, and sugar. In fiscal 2010, 1.5 percent of the 7.6-percent U.S. import growth was accounted for by import volume (metric tons), which leaves about 6 percent attributable to higher prices. The 8.2-percent projected import growth in 2011 reflects about 2 percent gain in volumes and 6 percent rise in unit values. To date, world food prices are up 8 percent in the past year and a half, while beverage prices are up 24 percent, including coffee, cocoa, tea, wine, and beer prices. These recent price effects are expected to be reflected in the value of U.S. food and beverage imports starting in the fourth quarter of 2010 and into 2011.

Of the additional \$7 billion in agricultural imports expected in 2011, about \$2 billion is projected from sugar and tropical products, \$3 billion from horticultural products, \$700 million from livestock and dairy products, and \$500 million from grain products. These projections are based on U.S. gross domestic product growth of at least 2.5 percent in 2011, down slightly from 2.7 percent in 2010. U.S. consumer spending gained strength starting last summer, even as disposable personal income growth remains weak. Consumer prices for food were up only about 1 percent since last year, a welcome scenario for consumption demand.

For horticultural crops, fresh fruits and vegetables are expected to combine for \$13.3 billion worth of imports in 2011, up from \$12 billion in 2010. This \$1.3-billion worth of additional imported produce comprises 44 percent of the expected \$3 billion projected gain in total horticultural imports for 2011. About 20 percent of U.S. horticultural imports are processed fruits and vegetables, including juices but excluding wine. Combining fresh and processed produce with nuts, these imports comprise more than a quarter of the total value of U.S. agricultural imports. In fact, all fruit and vegetable imports, worth an estimated \$22.1 billion in 2011, are nearly \$2 billion more than all imports of sugar and tropical products, and \$10.3 billion more than livestock and dairy imports.

Coffee bean prices from Brazil this summer exceeded the previous high price of \$1.42 per pound (in early 2008). This pattern closely resembles cocoa bean prices until the latter leveled off this summer. Another major commodity whose prices have dramatically jumped starting in late 2009 is sugar. This is largely due to reduced world production (mainly Brazil and Asia) and higher global sugar consumption. The biggest importers of sugar are the European Union, Russia, Indonesia, and the United States. In fiscal 2010, U.S. import unit values for sugar jumped 23 percent. Rubber import unit values went up even higher—by 26 percent

as U.S. automobile production staged a significant rebound. Import unit values for cocoa, coffee, and tea were up from 11 to 19 percent in 2010, contributing to the \$3-billion addition to U.S. imports of sugar and tropical products in 2010.

The more than \$200-million anticipated rise in U.S. beef imports in 2011 over 2010 is in part due to tight supplies of domestic processing beef. Cattle imports for 2011 are forecast at 2.1 million head, 2 percent lower than in 2010 due to decreased cattle inventories in Canada and Mexico. Overall, livestock and meat imports are projected to increase by \$550 million in 2011.

While still lower than in 2008, imported coconut oil values (from the Philippines) in 2010 are significantly higher than in 2009 and climbing. Palm oil and palm kernel oil prices are also on an upward path, although not as steeply as coconut oil's. These price-led import gains for tropical oils are mirrored partly in processed grain prices, which contribute to the \$700-million projected import bill for grain and feed products in 2011. If Malaysian rubber prices remain around \$1.60 per pound and consumer spending for cars continues its recent pace, the U.S. rubber import bill is expected to rise by \$600 million in 2011.

Table 5--U.S. agricultural imports: Value and volume by commodity, fiscal years 2007-2011

Commodity	Fiscal year				Forecast	
	2007	2008	2009	2010	Fiscal 2011 Aug.	Nov.
VALUE		<i>Billion dollars</i>				
Livestock, dairy, & poultry	12.030	12.175	10.682	10.843	11.0	11.5
Livestock and meats	8.907	8.703	7.615	7.947	8.1	8.5
Cattle and calves	1.698	2.022	1.386	1.546	1.4	1.6
Swine	0.646	0.544	0.332	0.344	0.3	0.4
Beef and veal	3.385	2.965	2.934	2.851	3.3	3.1
Pork	1.210	1.099	1.016	1.162	1.1	1.2
Dairy products	2.661	3.008	2.672	2.417	2.4	2.5
Cheese	1.076	1.172	1.044	0.963	0.9	1.0
Grains and feed	5.993	7.884	7.373	7.484	7.8	8.2
Grain products	3.917	4.603	4.521	4.886	5.1	5.4
Oilseeds and products	4.026	6.587	5.353	5.269	5.4	5.6
Vegetable oils	2.781	4.600	3.748	3.784	3.9	4.0
Horticulture products	32.386	34.707	33.017	35.549	37.5	38.5
Fruits, fresh	5.401	5.544	6.074	6.803	7.4	7.5
Fruits, processed	3.416	3.981	3.375	3.276	3.2	3.5
Fruit juices	1.616	1.932	1.414	1.279	1.3	1.4
Nuts, whole and processed	1.078	1.276	1.151	1.332	1.4	1.5
Vegetables, fresh	4.165	4.441	4.237	5.180	5.6	5.8
Vegetables, processed	3.149	3.520	3.483	3.574	3.7	3.8
Wine	4.543	4.753	4.084	4.258	4.5	4.5
Malt beer	3.686	3.662	3.428	3.452	3.5	3.6
Essential oils	2.431	2.653	2.406	2.414	2.6	2.6
Cut flowers & nursery stock	1.531	1.515	1.357	1.441	1.6	1.6
Sugar & tropical products	14.142	16.357	15.341	18.317	18.3	20.3
Sweeteners & products	2.625	3.049	3.286	4.112	3.7	4.6
Confections	0.174	1.255	1.173	1.279	1.3	1.4
Cocoa and chocolate	2.593	3.046	3.300	4.239	4.5	4.7
Coffee beans & products	3.654	4.349	4.148	4.393	4.5	4.8
Rubber, natural	2.087	2.711	1.569	2.433	2.4	3.0
Other imports 1/	1.486	1.610	1.639	1.492	1.7	1.6
Total agricultural imports	70.063	79.320	73.404	78.953	81.5	85.5
VOLUME		<i>Million metric tons</i>				
Wine 2/	0.869	0.835	0.933	0.972	1.1	1.1
Malt beer 2/	3.535	3.389	3.121	3.112	3.2	3.2
Fruit juices 2/	4.791	4.935	4.399	4.162	4.3	4.3
Cattle and calves 3/	2.320	2.563	2.040	2.251	2.0	2.1
Swine 3/	9.474	10.134	6.976	5.805	5.9	5.9
Beef and veal	1.026	0.820	0.897	0.804	0.9	0.9
Pork	0.423	0.359	0.358	0.374	0.4	0.4
Fruits, fresh	8.787	8.668	8.478	9.128	9.0	9.5
Fruits, processed	1.440	1.447	1.364	1.408	1.5	1.5
Vegetables, fresh	4.384	4.596	4.559	5.375	5.6	5.7
Vegetables, processed	2.953	3.015	2.937	2.927	3.1	3.1
Vegetable oils	2.645	3.255	3.339	3.456	3.5	3.6
Cocoa and chocolate	1.140	1.075	1.134	1.228	1.4	1.4
Coffee beans	1.369	1.350	1.346	1.276	1.4	1.4
Rubber, natural	1.005	1.065	0.739	0.914	1.0	1.0

Totals may not add due to rounding.

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

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

Regional Imports

U.S. imports of farm products are forecast to increase by 8 percent in 2011. Mexico, Canada, and the European Union are the leading contenders to supply most of that import growth. In terms of import volume (metric tons), the largest U.S. suppliers in 2010 were Canada, Mexico, Guatemala, Costa Rica, and Malaysia. By region, Southeast Asian countries export more than twice as much in volume of farm products to the U.S. as the European Union. The EU, however, trails only Canada in terms of value of agricultural exports to the United States. After Mexico, South America is ahead of Southeast Asia in export value to the United States. These top 5 regions supply more than three-quarters of imported U.S. farm products.

The top four exporters of fresh vegetables to the United States are Mexico, Canada, Peru, and China. These countries make up 93 percent of the total imported supply. By itself, Mexico supplies more than two-thirds of imported fresh vegetables. More than a third of U.S. fresh vegetable imports are tomatoes, and 83 percent are shipped north from Mexico. Although the share of imported fresh vegetables is only 18 percent of domestic consumption, 44 percent of tomatoes consumed are imported. The next largest fresh vegetable imports are sweet and chili peppers, two-thirds of which are supplied by Mexico. The third largest vegetable imports are frozen potatoes, largely for French fries, from Canada. About 22 percent of French fries consumed in the United States are imported.

Table 6--U.S. agricultural imports: Value by region, fiscal years 2007-2011

Country and region 1/	Fiscal year				Forecast		Share of 2010 total
	2007	2008	2009	2010	Fiscal 2011		
					Aug.	Nov.	
	<i>Billion dollars</i>						<i>Percent</i>
Western Hemisphere	37.085	41.880	40.087	42.883	44.5	47.6	55.3
Canada	14.703	17.936	15.354	15.682	16.2	17.5	20.3
Mexico	9.916	10.761	11.248	12.972	13.4	15.0	17.4
Central America	3.110	3.548	3.358	3.763	4.0	4.1	4.8
Costa Rica	1.214	1.202	1.128	1.248	1.3	1.4	1.6
Guatemala	1.025	1.259	1.292	1.381	1.5	1.5	1.7
Other Central America	0.870	1.087	0.938	1.134	1.3	1.3	1.5
Caribbean	0.451	0.423	0.525	0.577	0.6	0.6	0.7
South America	8.905	9.212	9.603	9.889	10.3	10.5	12.2
Argentina	1.102	1.176	1.188	1.088	1.1	1.3	1.5
Brazil	2.539	2.598	2.551	2.644	2.6	2.7	3.1
Chile	1.919	1.961	2.135	2.274	2.4	2.4	2.8
Colombia	1.518	1.716	1.771	1.854	2.0	2.0	2.3
Other South America	2.929	1.762	1.958	2.029	2.1	2.2	2.6
Europe and Eurasia	15.547	16.565	14.515	14.989	16.0	16.0	18.6
European Union-27 1/	14.990	15.781	13.642	14.152	15.0	15.0	17.4
Other Europe	0.491	0.706	0.793	0.774	0.8	0.9	1.0
Asia	10.821	14.166	12.040	14.055	14.0	14.9	17.3
East Asia	3.764	4.481	3.949	4.363	4.5	4.5	5.2
China	2.798	3.426	2.915	3.210	3.3	3.3	3.8
Other East Asia	0.966	1.055	1.034	1.153	1.3	1.2	1.4
Southeast Asia	5.840	8.007	6.627	8.052	7.8	8.6	10.0
Indonesia	1.938	2.669	1.999	2.631	2.4	2.9	3.4
Malaysia	1.028	1.710	1.480	1.604	1.5	1.8	2.1
Thailand	1.497	1.831	1.594	1.917	1.9	2.0	2.3
Other Southeast Asia	2.404	1.796	1.554	1.900	2.0	2.0	2.3
South Asia	1.217	1.678	1.465	1.640	1.7	1.8	2.1
India	1.099	1.533	1.319	1.498	1.5	1.6	1.9
Oceania	4.402	4.243	4.313	4.052	4.0	4.0	5.0
Australia	2.610	2.404	2.442	2.319	2.3	2.3	2.9
New Zealand	1.701	1.740	1.779	1.624	1.6	1.7	2.1
Africa	1.392	1.659	1.656	2.222	2.3	2.4	2.8
Sub-Saharan	1.178	1.402	1.357	1.947	2.0	2.0	2.3
Ivory Coast	0.482	0.633	0.603	0.908	1.0	0.9	1.0
Middle East	0.815	0.808	0.792	0.753	0.7	0.8	0.9
Turkey	0.478	0.490	0.484	0.422	0.4	0.5	0.6
World total	70.063	79.320	73.404	78.953	81.5	85.5	100.0

Totals may not add due to rounding.

1/ The former EU-25 plus Romania and Bulgaria which acceded in January 2007.

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

Reliability Tables

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

Commodity	Average forecast errors fiscal 2010					Forecast accuracy fiscal 2010					Forecast accuracy
	Aug ¹	Nov	Feb	May	Aug ²	Aug ¹	Nov	Feb	May	Aug ²	
Export value	<i>Percent</i>					<i>"X" if error < 5%</i>					<i>Percent</i>
Grains and feeds	7	4	9	5	0	-	X	-	X	X	60
Wheat	0	2	15	10	2	X	X	-	-	X	60
Rice	22	22	17	9	4	-	-	-	-	X	20
Coarse grains	2	4	1	0	1	X	X	X	X	X	100
Corn	1	4	1	1	0	X	X	X	X	X	100
Feeds and fodders	20	18	14	5	2	-	-	-	-	X	20
Oilseeds and products	21	20	9	4	3	-	-	-	X	X	40
Soybeans	24	22	9	5	4	-	-	-	-	X	20
Soybean meal	29	26	16	3	3	-	-	-	X	X	40
Soybean oil	8	8	0	0	8	-	-	X	X	-	40
Livestock, poultry, and dairy	8	7	7	6	1	-	-	-	-	X	20
Livestock products	6	5	3	4	1	-	-	X	X	X	60
Beef and veal	19	13	6	6	0	-	-	-	-	X	20
Pork	3	3	8	5	8	X	X	-	-	-	40
Beef and pork variety meats	40	30	30	10	10	-	-	-	-	-	0
Hides, skins, and furs	19	24	29	24	10	-	-	-	-	-	0
Poultry and products	0	2	11	4	4	X	X	-	X	X	80
Broiler meat	3	0	10	0	3	X	X	-	X	X	80
Dairy products	29	24	18	15	9	-	-	-	-	-	0
Tobacco, unmanufactured	0	0	0	0	0	X	X	X	X	X	100
Cotton	35	31	17	4	0	-	-	-	X	X	40
Seeds	8	8	8	8	8	-	-	-	-	-	0
Horticultural products	3	5	5	0	1	X	X	X	X	X	100
Fruits and vegetables, fresh	3	3	3	0	0	X	X	X	X	X	100
Fruits & veget., processed	7	2	2	4	4	-	X	X	X	X	80
Tree nuts, whole/processed	7	12	5	2	2	-	-	X	X	X	60
Sugar and tropical products	7	7	7	4	2	-	-	-	X	X	40
Major bulk products	16	13	9	5	2	-	-	-	X	X	40
Total agricultural exports	11	10	8	4	1	-	-	-	X	X	40
Average error and accuracy	12	11	10	5	3	31%	38%	31%	62%	79%	48
Export volume											
Wheat	1	4	15	7	1	X	X	-	-	X	60
Rice	19	21	19	9	2	-	-	-	-	X	20
Coarse grains	5	5	0	1	1	-	-	X	X	X	60
Corn	6	6	0	2	0	-	-	X	X	X	60
Feeds and fodders	27	21	18	7	2	-	-	-	-	X	20
Soybeans	18	14	9	5	4	-	-	-	-	X	20
Soybean meal	20	14	10	1	3	-	-	-	X	X	40
Soybean oil	0	0	0	0	0	X	X	X	X	X	100
Beef and veal	14	14	0	0	0	-	-	X	X	X	60
Pork	7	7	7	7	7	-	-	-	-	-	0
Beef and pork variety meats	29	14	29	0	0	-	-	-	X	X	40
Broiler meat	7	7	10	10	0	-	-	-	-	X	20
Tobacco, unmanufactured	0	0	0	0	0	X	X	X	X	X	100
Cotton	19	15	7	4	0	-	-	-	X	X	40
Major bulk products	5	4	7	4	1	X	X	-	X	X	80
Average error and accuracy	12	10	9	4	1	27%	27%	33%	60%	93%	48

¹ Forecast made for following fiscal year, with 15 months out. ² Forecast made for current fiscal year, with 3 months remaining in current fiscal year. - = Error exceeds 5 percent.

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

Country/region	Average forecast errors fiscal 2010					Forecast accuracy fiscal 2010					Forecast accuracy
	Aug ¹	Nov	Feb	May	Aug ²	Aug ¹	Nov	Feb	May	Aug ²	
Export value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					
Asia	19	17	15	7	2	-	-	-	-	X	20
East Asia	17	16	14	6	3	-	-	-	-	X	20
Japan	2	1	0	0	0	X	X	X	X	X	100
China	28	26	23	7	7	-	-	-	-	-	0
Hong Kong	32	28	24	20	0	-	-	-	-	X	20
Taiwan	16	9	6	0	0	-	-	-	X	X	40
South Korea	22	22	18	12	0	-	-	-	-	X	20
Southeast Asia	26	22	19	11	0	-	-	-	-	X	20
Indonesia	19	19	19	10	0	-	-	-	-	X	20
Philippines	19	19	19	6	0	-	-	-	-	X	20
Malaysia	38	25	25	13	0	-	-	-	-	X	20
Thailand	18	18	18	9	0	-	-	-	-	X	20
South Asia	27	20	20	13	0	-	-	-	-	X	20
Western Hemisphere	2	3	1	0	0	X	X	X	X	X	100
North America	0	3	1	0	0	X	X	X	X	X	100
Canada	3	5	3	1	1	X	-	X	X	X	80
Mexico	4	1	1	1	1	X	X	X	X	X	100
Caribbean	6	6	6	3	3	-	-	-	X	X	40
Central America	4	0	4	4	0	X	X	X	X	X	100
South America	24	12	10	10	2	-	-	-	-	X	20
Brazil	20	20	20	20	0	-	-	-	-	X	20
Colombia	13	25	25	13	13	-	-	-	-	-	0
Venezuela	0	9	0	9	9	X	-	X	-	-	40
Europe and Eurasia	9	3	1	3	1	-	X	X	X	X	80
European Union-27	14	9	8	2	0	-	-	-	X	X	40
Other Europe	25	50	50	50	0	-	-	-	-	X	20
FSU-12	14	21	29	21	7	-	-	-	-	-	0
Russia	30	40	50	40	20	-	-	-	-	-	0
Middle East	14	13	11	9	2	-	-	-	-	X	20
Turkey	35	30	30	15	5	-	-	-	-	X	20
Saudi Arabia	13	13	13	13	0	-	-	-	-	X	20
Africa	8	12	10	6	2	-	-	-	-	X	20
North Africa	29	29	18	11	0	-	-	-	-	X	20
Egypt	13	13	6	6	6	-	-	-	-	-	0
Sub-Sahara	14	0	5	0	5	-	X	X	X	X	80
Oceania	14	14	14	14	0	-	-	-	-	X	20
Transshipments via Canada	33	33	33	33	33	-	-	-	-	-	0
Average error and accuracy	17	16	15	11	3	19%	19%	24%	30%	81%	35

¹ Forecast made for following fiscal year, with 15 months out. ² Forecast made for current fiscal year, with 3 months remaining in current fiscal year. - = Error exceeds 5 percent.

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

Commodity	Average forecast errors fiscal 2010					Forecast accuracy fiscal 2010					Forecast accuracy
	Aug ¹	Nov	Feb	May	Aug ²	Aug ¹	Nov	Feb	May	Aug ²	
Import value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Livestock, dairy, and poultry	11	5	5	2	1	-	X	X	X	X	80
Livestock and red meats	6	1	1	4	3	-	X	X	X	X	80
Cattle and calves	0	0	0	7	0	X	X	X	-	X	80
Swine	0	0	0	0	0	X	X	X	X	X	100
Beef and veal	14	3	3	7	0	-	X	X	-	X	60
Pork	17	17	17	17	8	-	-	-	-	-	0
Dairy products	29	21	21	4	0	-	-	-	X	X	40
Cheese	20	10	10	0	0	-	-	-	X	X	40
Grains and feed	9	1	1	1	1	-	X	X	X	X	80
Grain products	2	6	6	0	0	X	-	-	X	X	60
Oilseeds and products	25	13	13	11	6	-	-	-	-	-	0
Vegetable oils	21	11	11	13	5	-	-	-	-	-	0
Horticulture products	0	3	3	1	0	X	X	X	X	X	100
Fruits--fresh	6	3	3	3	1	-	X	X	X	X	80
Fruits--processed	12	9	9	9	6	-	-	-	-	-	0
Fruit juices	23	15	15	8	8	-	-	-	-	-	0
Nuts--whole and processed	8	8	8	0	0	-	-	-	X	X	40
Vegetables--fresh	15	17	17	2	0	-	-	-	X	X	40
Vegetables--processed	3	0	0	0	0	X	X	X	X	X	100
Wine	5	2	2	2	0	X	X	X	X	X	100
Malt beer	6	0	0	0	6	-	X	X	X	-	60
Essence oils	8	4	4	0	4	-	X	X	X	X	80
Cut flowers & nursery stock	0	0	0	7	0	X	X	X	-	X	80
Sugar and tropical products	2	10	10	5	5	-	-	-	-	X	20
Cane and beet sugar	51	68	68	12	12	-	-	-	-	-	0
Confections	0	8	8	0	0	X	-	-	X	X	60
Cocoa and chocolate	14	14	14	10	5	-	-	-	-	X	20
Coffee beans and products	2	2	2	2	2	X	X	X	X	X	100
Rubber--natural	0	17	17	33	17	X	-	-	-	-	20
Total agricultural imports	4	2	2	3	3	X	X	X	X	X	100
Average error and accuracy	11	9	9	5	3	35%	48%	48%	61%	74%	54
Import volume											
Wine (HL)	20	0	0	0	0	-	X	X	X	X	80
Malt beer (HL)	10	3	3	6	3	-	X	X	-	X	60
Fruit juices (HL)	2	7	7	5	0	X	-	-	X	X	60
Cattle and calves	4	9	9	9	4	X	-	-	-	X	40
Swine	7	2	2	2	0	-	X	X	X	X	80
Beef and veal	25	13	13	0	0	-	-	-	X	X	40
Pork	0	0	0	0	0	X	X	X	X	X	100
Fruits--fresh	1	3	3	10	3	X	X	X	-	X	80
Fruits--processed	7	0	0	0	0	-	X	X	X	X	80
Vegetables--fresh	15	15	15	15	0	-	-	-	-	X	20
Vegetables--processed	7	3	3	0	0	-	X	X	X	X	80
Vegetable oils	0	3	3	9	3	X	X	X	-	X	80
Cocoa and chocolate	0	0	0	8	8	X	X	X	-	-	60
Coffee beans	15	8	8	0	0	-	-	-	X	X	40
Rubber--natural	11	0	0	11	0	-	X	X	-	X	60
Average error and accuracy	8	4	4	5	1	40%	67%	67%	53%	93%	64

¹ Forecast made for following fiscal year, with 15 months out. ² Forecast made for current fiscal year, with 3 months remaining in current fiscal year. - = Error exceeds 5 percent. HL = hectoliters.

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

Country/region	Average forecast errors fiscal 2010					Forecast accuracy fiscal 2010					Forecast accuracy
	Aug ¹	Nov	Feb	May	Aug ²	Aug ¹	Nov	Feb	May	Aug ²	
Import value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Western Hemisphere	3	2	2	2	3	X	X	X	X	X	100
Canada	10	2	2	7	4	-	X	X	-	X	60
Mexico	6	8	8	2	3	-	-	-	X	X	40
Central America	0	5	5	8	0	X	-	-	-	X	40
Costa Rica	8	0	0	8	0	-	X	X	-	X	60
Guatemala	7	0	0	7	0	-	X	X	-	X	60
Other Central America	9	9	9	18	9	-	-	-	-	-	0
Caribbean	17	0	0	17	0	-	X	X	-	X	60
South America	7	2	2	1	2	-	X	X	X	X	80
Argentina	36	18	18	9	9	-	-	-	-	-	0
Brazil	4	0	0	4	4	X	X	X	X	X	100
Chile	0	4	4	0	0	X	X	X	X	X	100
Colombia	0	0	0	0	0	X	X	X	X	X	100
Other South America	10	5	5	5	0	-	X	X	X	X	80
Europe and Eurasia	7	1	1	0	1	-	X	X	X	X	80
European Union-27	4	1	1	1	1	X	X	X	X	X	100
Other Europe	38	25	25	13	0	-	-	-	-	X	20
Asia	1	6	6	9	6	X	-	-	-	-	20
East Asia	0	7	7	2	2	X	-	-	X	X	60
China	0	6	6	3	3	X	-	-	X	X	60
Other East Asia	0	8	8	0	0	X	-	-	X	X	60
Southeast Asia	0	9	9	14	9	X	-	-	-	-	20
Indonesia	0	15	15	19	12	X	-	-	-	-	20
Malaysia	13	6	6	19	13	-	-	-	-	-	0
Thailand	0	5	5	5	5	X	-	-	-	-	20
Other Southeast Asia	11	11	11	5	0	-	-	-	-	X	20
South Asia	13	6	6	6	0	-	-	-	-	X	20
India	7	0	0	13	7	-	X	X	-	-	40
Oceania	20	10	10	12	7	-	-	-	-	-	0
Australia	17	9	9	4	4	-	-	-	X	X	40
New Zealand	25	19	19	19	6	-	-	-	-	-	0
Africa	18	23	23	9	0	-	-	-	-	X	20
Sub-Saharan	21	26	26	11	0	-	-	-	-	X	20
Ivory Coast	33	33	33	22	11	-	-	-	-	-	0
Middle East	13	0	0	0	13	-	X	X	X	-	60
Turkey	25	25	25	25	0	-	-	-	-	X	20
Average error and accuracy	11	9	9	8	4	36%	39%	39%	39%	67%	44

¹ Forecast made for following fiscal year, with 15 months out. ² Forecast made for current fiscal year, with 3 months remaining in current fiscal year. - = Error exceeds 5 percent.



United States
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Contact Information

Forecast Coordinators (area code 202)

Exports: Oliver Flake/FAS, 720-1226, Oliver.Flake@fas.usda.gov
Tani Lee/FAS, 720-0522, Tani.Lee@fas.usda.gov
Imports: Andy Jerardo/ERS, 694-5266, ajerardo@ers.usda.gov

Commodity Specialist Contacts (area code 202)

Grains and Feeds:

Coarse Grains: Edward W. Allen/ERS, 694-5288
Richard O'Meara/FAS, 720-4933

Wheat: Edward W. Allen/ERS, 694-5288
Teresa McKeivier/FAS, 720-1072

Rice: Nathan Childs/ERS, 694-5292
Nicolas Rubio/FAS, 720-1073

Oilseeds: Mark Ash/ERS, 694-5289
Bill George/FAS, 720-6234

Cotton: James Johnson/FAS, 690-1546
Leslie Meyer/ERS, 694-5307

Livestock, Poultry & Dairy Products:

Beef & Cattle: Claire Mezoughem/FAS, 720-7715

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

Poultry: Dave Harvey/ERS, 694-5177
Anneke Gustafson/FAS, 720-7285

Dairy Products: Paul Kiendl/FAS, 720-8870

Horticultural & Tropical Products:

Deciduous Fresh Fruit: Shari Kosco/FAS, 720-2083

Fresh Citrus: Reed Blauer/FAS, 720-0898

Vegetables & Preparations: Shari Kosco/FAS, 720-2083

Tree Nuts: Tony Halstead/FAS, 690-2312

Sugar and Tropical Products: Bob Knapp/FAS, 720-4620
Sugar: Ron Lord/FAS, 720-6939

Macroeconomics Contact (area code 202)

David Torgerson/ERS, 694-5334, dtorg@ers.usda.gov

Related Websites

Outlook for U.S. Agricultural Trade

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

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

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

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

FAQ & Summary Data: <http://www.ers.usda.gov/data/fatus>

Articles on U.S. Trade: <http://www.ers.usda.gov/briefing/agtrade>

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