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Electronic Outlook Report from the  
Economic Research Service and Foreign Agricultural Service



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# Outlook for U.S. Agricultural Trade

## FY 2011 Exports Expected to Rise to \$135.5 Billion; Imports to Rise to \$88 Billion

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Approved by the  
World Agricultural  
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Fiscal 2011 agricultural exports are forecast at a record \$135.5 billion, up \$9 billion from the November forecast and \$26.8 billion above 2010. Exports are forecast to exceed the previous record set in 2008 by \$20.6 billion. Sharply higher unit values for grains, soybeans, and cotton account for most of the forecast increase.

Compared to November indications, grain exports are forecast up \$3.5 billion due to higher prices and tightening supplies in other exporting countries. Corn exports are forecast up \$1.1 billion, based primarily on higher unit values given the tight domestic situation. Wheat exports are up \$2.5 billion, due to higher volume and values, as world supplies of milling quality wheat tighten. Oilseeds are up nearly \$2 billion based on higher unit values and increased volumes. Cotton exports are forecast up on higher prices and tight global supplies. Strong global demand is behind a higher forecast for dairy and animal products, which are up a combined \$1 billion. Horticultural exports are forecast up due, in part, to increased tree nut shipments. The forecast for agricultural exports to China is raised to a record \$20 billion as the country becomes the top U.S. market. Canada, Mexico, and the EU are all up significantly from November.

Fiscal 2011 imports are forecast up \$2.5 billion from the November forecast to a record \$88 billion. About \$1.7 billion of the \$2.5 billion increase is from sugar and tropical products. About \$200 million is attributed to imported sugar and sugar products, including confections. Another \$400 million is expected from coffee beans, and more than \$1 billion from rubber. The agricultural trade surplus is forecast at a record \$47.5 billion, up almost \$12 billion from the previous record in 2008.

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

Item	2006	2007	2008	2009	2010	Forecast fiscal 2011	
						Nov.	Feb.
<i>Billion dollars</i>							
Exports	68.6	82.2	114.9	96.3	108.7	126.5	135.5
Imports	64.0	70.1	79.3	73.4	79.0	85.5	88.0
Balance	4.6	12.1	35.6	22.9	29.7	41.0	47.5

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

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

### *World Growth Solid; Inflation Up; Dollar Down*

The world macroeconomic outlook for 2011, as summarized in table 2, supports and depends on continued growth in world trade. World trade volume in 2010 is estimated to have risen 14 percent—largely turning around the decline in trade in 2009. In 2011, world trade is expected to grow 7.5 percent.

In 2011 world growth is expected to be solid, with world inflation up and the dollar down compared to 2010. Asian and Latin American Central banks have been raising short-term interest rates, to deal with rising inflationary expectations induced by higher industrial and agricultural commodity prices and, for some nations, tighter labor markets. In addition, some countries have been restricting commodity exports, to mitigate the impact of rising demand on domestic prices. As higher commodity prices are a relatively small part of U.S. and Eurozone inflation and their labor markets and factory utilization have a good deal of slack, inflation is perceived as less risky than unemployment in Europe and the United States. So the European Central Bank and the Federal Reserve have kept interest rates low.

This world macroeconomic environment supports growing U.S. agricultural exports. Solid world growth and a weaker dollar support U.S. agricultural product export growth through increased demand for U.S. agricultural commodities. The current interest rate and credit environment continues to support the financing of world agricultural product trade.

The 2011 macroeconomic outlook is subject to three publicized risks due to (1) inflation, (2) the European debt and (3) political events in the Middle East. The risk from inflation is that excessive increases in short-term interest rates in developing countries may curtail world GDP growth at the end of 2011. If the European debt problem were to result in lower debt ratings for European sovereign debt that rating change would cause the dollar to rise sharply. The political events in the Middle East could disrupt the transportation of oil and agricultural products causing sharp increases in energy prices. The bell-weather Brent crude oil Price recently exceeded \$108 per barrel reflecting this concern. Nevertheless, the current financial markets, at this writing, reflect little expectation that these three risks will seriously upset the world economic outlook depicted in table 2. The dollar is weak, interest rates are relatively low and stock markets are back to near 2007 highs.

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

Region/country (11/10/2010)	Real GDP (Per Capita)			Current Account		Real Exch Rate 2/		CPI	
	2010	2001-10	2011	2001-100	2011	2001-10	2011	2001-10	2011
	\$	Growth rate		Share of GDP		Growth rate		Growth rate	
World	7,556	1.1	2.3	--	--	--	--	2.9	3.2
NAFTA	39,629	0.6	1.6	-3.9	-2.9	-1.5	-7.5	2.4	2.3
Canada	37,262	1.0	1.5	0.7	-1.7	-3.0	-7.5	2.0	2.3
United States	41,890	0.6	1.6	-4.6	-3.1	0.0	0.0	2.4	2.0
Mexico	7,075	0.1	3.4	-1.1	-2.1	1.0	-11.3	4.6	3.9
Latin America + Caribbean	15,972	1.5	3.4	-0.1	-1.1	0.0	-6.9	6.7	8.2
Argentina	5,411	3.0	3.2	3.2	0.5	12.8	1.9	9.7	9.2
Brazil	5,656	1.7	4.0	-0.6	-1.9	-3.5	-10.5	6.7	5.4
Europe	26,912	1.0	1.6	0.2	0.2	-2.6	-6.5	2.2	2.5
Asia and Oceania	3,320	2.9	4.1	3.3	2.9	-0.6	-7.3	1.9	3.3
China	2,557	9.3	8.6	5.8	4.2	-1.4	-6.5	1.9	4.2
Japan	33,074	0.5	1.5	3.4	3.5	0.8	-6.6	-0.3	0.3
Korea	19,702	3.5	3.5	1.9	4.9	0.0	-8.1	3.2	3.6
Indonesia	1,546	3.8	5.1	2.0	0.2	-4.6	-5.5	8.6	6.3
Vietnam	775	5.9	5.8	-4.9	-7.0	-2.1	-5.3	6.6	7.1
India	902	5.7	5.9	-0.7	-2.7	-3.2	-5.5	6.2	7.0
Australia	37,292	1.7	2.1	-4.6	-3.2	-4.4	-6.3	3.0	2.6
New Zealand	25,036	1.3	1.4	-5.9	-6.4	-4.6	-9.3	2.6	4.5
Middle East	5,395	2.1	3.3	9.8	8.0	-4.4	1.4	8.1	8.2
Turkey	4,775	1.9	3.7	-3.4	-5.5	-4.2	9.8	18.9	5.2
Africa	1,159	2.2	2.8	3.4	0.6	-2.7	-4.3	7.1	6.7

-- = 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, GlobalInsight, and Oxford Economics.

## Export Products

The fiscal 2011 forecast for grain and feed exports is up \$3.5 billion from the November forecast to a record \$38.9 billion. Corn and wheat are boosted significantly with most other categories changed little in aggregate. Corn exports are up \$1.1 billion to \$13.4 billion, largely due to higher unit values arising from tight U.S. supplies and strong domestic demand. U.S. stocks are forecast to be the lowest in 15 years. Competition from Argentina is reduced because of a smaller crop, but is mostly offset by lower global demand. Wheat exports are raised \$2.5 billion to \$12.3 billion on higher unit values and larger volumes. Tightening exportable supplies of milling quality wheat in other exporting countries is providing opportunities for the United States to gain market share in Egypt, the Middle East, and Asia. Rice exports are down \$100 million to \$2.2 billion due to weaker sales to Oceania and South America.

The fiscal 2011 forecast for oilseeds and products is increased to \$30.2 billion, up \$1.9 billion from the November forecast. Higher unit values and larger volumes for soybeans, meal, and oil are key factors strengthening the forecast. Strong early season soybean sales have led to an increase in volume, while unit values have jumped in response to large foreign demand and tightening U.S. stocks. Soybean oil exports are raised as an extremely tight global vegetable oil market looks for additional volume from the United States.

The fiscal 2011 cotton export forecast is raised \$800 million since November to \$8.8 billion. Export volume is unchanged at 3.4 million. Export values were raised to reflect the dramatic rise in unit values in recent weeks. Unit values for cotton have approached \$2.00 per pound as competition drives up unit values for the few remaining stocks of uncommitted cotton.

The fiscal 2011 export forecast for livestock, poultry, and dairy is raised \$1.9 billion to a record \$24.9 billion, with gains across the board but most significantly for dairy and animal by-products. The export forecast for dairy products is raised \$500 million due to rising global unit values and increased export volumes to Mexico and Asia. International dairy prices have been strengthening due to weather-related production concerns in the EU and Oceania. Economic recovery bolsters hides and skins demand, particularly by China and South Korea, driving the forecast \$500 million higher. Soaring feed unit values and tight supplies consequently strengthen other animal by-product (lard, tallow, grease, and meat and bone meal) volumes and unit values. Exports of poultry products and beef are forecast up \$140 million each, as Asian economic recovery generates robust demand. Pork exports are raised \$100 million on higher unit values.

The fiscal 2011 forecast for horticultural products is \$25 billion, up \$700 million from the November forecast. Whole and processed tree nut exports are forecast at \$4.7 billion, up \$400 million as record almond, pistachio, and walnut production boosts trade to most markets. Fresh fruit and vegetable exports are forecast at \$6.3 billion and processed fruit and vegetable exports are forecast at \$6 billion, each up \$100 million due to slightly higher volumes to Japan. Fiscal 2011 exports of sugar and tropical products, including coffee and cocoa products, are forecast unchanged at \$5 billion.

Table 3--U.S. agricultural exports: Value and volume by commodity, 2009-2011

Commodity	October - December		Fiscal year 2010	Forecast fiscal 2011	
	2009	2010		Nov.	Feb.
<b>VALUE</b>	<i>-- Billion dollars --</i>				
Grains and feeds 1/	6.045	7.974	27.285	35.4	38.9
Wheat 2/	1.227	2.098	5.868	9.8	12.3
Rice	0.514	0.549	2.322	2.3	2.2
Coarse grains 3/	2.108	2.867	9.843	13.3	14.4
Corn	1.919	2.658	9.096	12.3	13.4
Feeds and fodders	1.281	1.519	5.580	6.1	6.2
Oilseeds and products 4/	10.359	12.065	25.369	28.3	30.2
Soybeans	8.000	9.612	16.945	20.3	21.2
Soybean meal 5/	1.211	0.939	3.795	3.2	3.6
Soybean oil	0.376	0.603	1.347	1.3	1.7
Livestock, poultry, and dairy	5.061	6.419	21.535	23.0	24.9
Livestock products	3.201	4.043	13.547	15.1	16.4
Beef and veal 6/	0.697	1.016	3.220	3.7	3.9
Pork 6/	0.947	1.101	3.927	4.6	4.7
Beef and pork variety meats 6/	0.237	0.302	1.000	1.0	1.1
Hides, skins, and furs	0.387	0.554	2.117	2.3	2.8
Poultry and products	1.196	1.389	4.619	4.7	4.8
Broiler meat 6/ 7/	0.802	0.921	3.012	3.0	3.1
Dairy products	0.663	0.986	3.369	3.2	3.7
Tobacco, unmanufactured	0.384	0.330	1.221	1.2	1.2
Cotton	0.722	1.710	4.758	8.0	8.8
Seeds	0.367	0.389	1.232	1.3	1.3
Horticultural products 8/	6.109	7.068	22.610	24.3	25.0
Fruits and vegetables, fresh	1.467	1.681	5.859	6.2	6.3
Fruits and vegetables, processed 8/	1.389	1.526	5.613	5.9	6.0
Tree nuts, whole and processed	1.492	1.955	4.060	4.3	4.7
Sugar and tropical products 9/	1.106	1.269	4.571	5.0	5.0
Major bulk products 10/	12.954	17.166	40.957	55.0	60.1
Total	30.163	37.308	108.664	126.5	135.5
<b>VOLUME</b>	<i>--- Million metric tons ---</i>				
Wheat 2/	5.447	7.190	25.848	34.5	36.4
Rice	0.893	1.118	4.279	4.4	4.2
Coarse grains 3/	11.337	12.040	54.091	54.3	54.1
Corn	10.234	11.135	49.833	50.0	50.0
Feeds and fodders	4.117	4.893	18.779	19.3	18.9
Soybeans	19.672	20.227	41.770	42.7	43.3
Soybean meal 5/	3.114	2.427	10.137	8.3	8.3
Soybean oil	0.437	0.575	1.523	1.2	1.3
Beef and veal 6/	0.169	0.214	0.715	0.8	0.8
Pork 6/	0.380	0.389	1.429	1.6	1.6
Beef and pork variety meats 6/	0.174	0.213	0.711	0.7	0.8
Broiler meat 6/ 7/	0.775	0.886	2.961	3.0	3.1
Tobacco, unmanufactured	0.059	0.053	0.184	0.2	0.2
Cotton	0.438	0.717	2.682	3.4	3.4
Major bulk products 10/	37.845	41.346	128.854	139.5	141.6

Total may not add due to rounding.

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

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

## Regional Exports

### *Revised Outlook for Fiscal 2011*

Agricultural exports are forecast up \$9.0 billion from the November forecast with \$3.7 billion of the increase coming in Asia and focused in China and Southeast Asia. Exports to Canada, Mexico, and the EU are also forecast up with EU exports the second highest since 1982. North Africa, particularly Egypt, is up as high unit values spurred record exports in the first quarter of fiscal 2011. Recent political developments there are not expected to significantly dampen U.S. export prospects over the remainder of the year.

### *Asia*

U.S. agricultural exports to Asia in fiscal 2011 are forecast at a record \$58.5 billion, which is up 6.8 percent from the November forecast. Exports to East Asia have been the strongest over the past year followed by Southeast Asia and South Asia. China is now forecast to be the top market for U.S. exports at \$20 billion, surpassing Canada at \$18.5 billion. Exports are expected to follow a similar pattern to last year with very heavy shipments for the first half of the year and a significant slow-down for the second half. Record exports to China for the first quarter of the fiscal year were dominated by soybeans, which made up 77 percent of exports. However, cotton shipments have also been strong at more than \$500 million greater than the first quarter of last year. Soybean oil exports far surpassed the previous first quarter record at \$260 million. For the remainder of the year, increased shipments of soybeans and cotton are expected while tree nut and beef product (hides and skins) exports also support the record forecast.

No change was made to the forecasts for Japan and Hong Kong. Exports to these countries were very high during the first quarter of the year but in line with the November forecasts. Exports to South Korea are up \$200 million on higher corn value and increased unit value and volume shipments of beef and pork. The forecast for exports to Southeast Asia is raised with Vietnam forecast at a record \$1.8 billion due primarily to higher U.S. cotton export unit values. Additionally, exports of horticultural products, distillers' dried grains, and dairy products are expected to rise.

### *Western Hemisphere*

The forecasts for Canada and Mexico—the number two and three markets—are raised. Mexico is forecast up \$1 billion due mostly to higher wheat and meat exports. Canada is forecast up \$500 million primarily due to greater exports and unit values for consumer-oriented products, such as meats and horticultural products. Central America is raised \$300 million. Exports to the region set a first quarter record on high soybean, soybean meal, corn, and wheat exports. The higher export value for corn and wheat is mostly a function of higher unit values, while soybeans and soybean meal have seen significant increases in volume shipments. Exports to South America are up \$300 million as recent increases for grain unit values should spur export values through the rest of the year. The forecasts for Peru, Brazil, and Venezuela are all raised.

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

The forecast for exports to the European Union (EU) is raised \$900 million to \$10 billion due to greater wheat, tree nut, rapeseed oil, and soybean meal exports. Germany, Spain, and the Netherlands remain the top markets. The United States has lost market share in the EU over the past decade, but if the forecast of \$10 billion is realized, it would be the second highest since 1983.

The forecast for exports to the Middle East is raised \$400 million due primarily to greater U.S. wheat shipments as supplies of milling quality wheat are tight in competing exporting countries. Exports to North Africa are raised \$700 million, in part, due to greater exports to Egypt. Agricultural exports to Egypt reached a record high in 2008 at \$2.2 billion before falling in 2009 and 2010. However, exports for the first quarter of fiscal 2011 reached an all-time record, and are forecast at \$2.2 billion for the year. Though competition is increasing from other major exporters, Egypt remains the top U.S. market in Africa. The current political situation is not expected to have a major impact on U.S. exports in 2011, as most U.S. exports are oriented toward either basic human needs, like wheat and dairy, or inputs to the domestic livestock and poultry industry. Demand is expected to continue strong for these products in Egypt. The tourism industry has been impacted by recent events which could impact U.S. high quality beef, fruit juice, and other consumer oriented exports, but these make up a small share of total U.S. exports.

The forecast for Sub-Saharan Africa is raised \$700 million based, in part, on higher unit values for wheat and poultry. Nigeria is the largest U.S. market in the region and the second largest U.S. wheat market globally. With the value of wheat exports up significantly over last year, exports to Nigeria are expected to reach a record.

Table 4--U.S. agricultural exports: Value by region, 2009-2011

Country and region 1/	October - December		Fiscal year 2010	Share of 2010 total	Forecast fiscal year 2011	
	2009	2010			Nov.	Feb.
	-- \$ Billion --			Percent	-- \$ Billion --	
Asia	14.212	18.241	45.736	42.1	54.8	58.5
East Asia	11.839	15.576	36.932	34.0	43.5	46.2
Japan	2.776	3.367	11.228	10.3	13.0	13.0
China	6.225	8.677	15.070	13.9	17.5	20.0
Hong Kong	0.785	1.133	2.460	2.3	3.3	3.3
Taiwan	0.915	0.930	3.174	2.9	3.7	3.7
South Korea	1.136	1.461	4.982	4.6	6.0	6.2
Southeast Asia	2.026	2.280	7.325	6.7	9.1	10.1
Indonesia	0.576	0.693	2.130	2.0	2.5	2.7
Philippines	0.429	0.457	1.606	1.5	1.8	2.0
Malaysia	0.252	0.187	0.778	0.7	0.9	0.9
Thailand	0.366	0.436	1.082	1.0	1.3	1.5
Vietnam	0.280	0.367	1.230	1.1	2/	1.8
South Asia	0.347	0.386	1.479	1.4	2.2	2.2
India	0.204	0.160	0.799	0.7	2/	0.8
Western Hemisphere	9.895	11.277	40.408	37.2	45.7	47.8
North America	7.474	8.408	30.497	28.1	34.0	35.5
Canada	4.091	4.381	16.566	15.2	18.0	18.5
Mexico	3.383	4.027	13.932	12.8	16.0	17.0
Caribbean	0.804	0.872	3.124	2.9	3.5	3.5
Dominican Republic	0.256	0.326	0.957	0.9	2/	1.0
Central America	0.672	0.875	2.720	2.5	3.2	3.5
South America	0.945	1.122	4.066	3.7	5.0	5.3
Brazil	0.111	0.158	0.527	0.5	0.7	0.8
Colombia	0.246	0.249	0.829	0.8	1.0	1.0
Peru	0.150	0.173	0.737	0.7	2/	0.8
Venezuela	0.232	0.269	1.072	1.0	1.2	1.3
Europe/Eurasia	3.102	3.594	10.255	9.4	11.1	12.2
European Union-27	2.531	2.914	8.511	7.8	9.1	10.0
Other Europe 3/	0.096	0.121	0.374	0.3	0.5	0.5
FSU-12 4/	0.475	0.559	1.370	1.3	1.5	1.7
Russia	0.396	0.493	1.044	1.0	1.2	1.4
Middle East	1.367	1.791	5.597	5.2	6.9	7.3
Turkey	0.474	0.574	2.012	1.9	2.7	2.7
Saudi Arabia	0.193	0.196	0.836	0.8	1.0	1.0
Africa	1.030	1.779	4.967	4.6	6.4	7.8
North Africa	0.530	1.159	2.787	2.6	4.0	4.7
Egypt	0.210	0.720	1.583	1.5	2.0	2.2
Sub-Saharan Africa	0.500	0.620	2.180	2.0	2.4	3.1
Nigeria	0.206	0.274	0.881	0.8	2/	1.3
Oceania	0.375	0.384	1.385	1.3	1.4	1.5
Trans-shipments via Canada 5/	0.182	0.243	0.315	0.3	0.2	0.2
<b>Total</b>	<b>30.163</b>	<b>37.308</b>	<b>108.664</b>	<b>100.0</b>	<b>126.5</b>	<b>135.5</b>

Total may not add due to rounding.

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

2/ New countries added this quarter include Vietnam, India, Dominican Republic, Peru, and Nigeria. No forecasts made in November.

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

As food and agricultural commodity prices increased during the second half of 2010, U.S. agricultural imports are forecast to reach \$88 billion in fiscal year 2011, \$2.5 billion more than the preceding forecast. This projection represents an 11-percent gain from 2010, of which 6 to 7 percent is attributed to higher import prices and 4 to 5 percent to greater volume. Real personal consumer spending for food and beverages rose 4.9 percent in the fourth quarter of 2010, while real spending for food services climbed 4.1 percent (in seasonally adjusted terms). These dovetail with real disposable personal income growth of 4.8 percent in the same period. The dollar's depreciation from its recent high in early 2009, however, may have a slowing effect on import demand as effective unit values increase. Commodity prices are exacerbated by higher petroleum prices. Domestic gasoline prices typically peak during driving season in July. The U.S. Energy Information Administration projects gasoline prices to remain above \$3 per gallon in 2011, about 50 cents more than in 2010.

World food prices registered a record high in January 2011, topping the previous high in mid-2008, and rising more than 50 percent since December 2008. Beverage prices are more than twice as high as in 2005, and agricultural raw material prices are now 82 percent higher than in the first half of 2009. Contributing to these significant price gains include rubber, sugar, tropical oils, coffee, cocoa, and tea prices, among other commodities. Sugar futures prices are 90 percent higher than during the first quarter of 2009. Rubber prices (largely from Indonesia) have climbed to three times the level of the first quarter of 2009. Coffee bean prices (from Brazil) reached their highest level since early 1998. And cocoa bean prices are threatening to rise even more if the Ivory Coast's export ban is not lifted soon. Since many commodities sold in the international market are paid for in dollars, the depreciating dollar will induce foreign suppliers to compensate by raising their export unit values.

About \$1.7 billion of the \$2.5 billion forecast adjustment for fiscal 2011 are from sugar and tropical products. Of this gain, about \$200 million are attributed to imported sugar and sugar products, including confections. Another \$400 million are expected from coffee beans. And more than \$1 billion more in rubber imports are projected for the year. Compared with 2010, total import value for sugar and tropical products shows an estimated 20-percent gain, of which 14 percent represents volume gains. Compared with horticultural products as a group, the \$22 billion of imported sugar and tropical products post a bigger gain from 2010, by close to \$600 million. Higher unit values for sugar, coffee, cocoa, and rubber reflect source supply problems, smaller stocks, or greater global demand.

Among imported horticultural products, only processed fruits are expected to post projected gains (of \$300 million) from the November 2010 estimate. The rest of the horticultural product projections remain the same or are lower, but still represent a collective 8-percent gain from 2010. At least \$500 million more of fresh vegetables and \$600 million more fresh fruits are projected to be imported compared with 2010. The exchange-rate-sensitive imports of wine and beer are anticipated to post a combined \$300 million gain from 2010, which is similarly projected for essential oils and nursery products. It should be noted that only fresh fruits, among the major horticultural products, registered consecutive annual gains in import value over the past decade. Despite higher import unit values in the first

quarter of fiscal 2011, there were correspondingly higher import volumes of horticultural products (except fresh fruits). Like sugar and tropical products, the combined unit value and volume gains for horticultural products indicate greater U.S. import demand.

As tropical oil prices have risen—for coconut, palm, and palm kernel oil—the U.S. import bill for these products is expected to jump by more than \$500 million from 2010 and by \$300 million from the November forecast. Larger imports of palm oil by India and a higher tax imposed by Indonesia on domestic palm oil production are partly behind the export price inflation. Since olive oil prices are relatively low and flatter than tropical oils, some substitution is expected over the year. The higher wheat unit values reflected in grain products is projected to push the value of grain product imports to \$5.2 billion, up \$300 million from 2010. An additional \$200 million worth of imported feeds and fodders over the 2010 value is also expected.

The forecast for beef imports is lowered by \$200 million due to a weak dollar and high unit values on tight global supplies. The pork import forecast is revised up \$64 million as unit values have climbed. The per head prices of imported cattle and swine are also up, in part, due to high feed costs, tight supplies, and a weaker dollar.

Table 5--U.S. agricultural imports: Value and volume by commodity, fiscal years 2010-2011

Commodity	October -- December		Fiscal year 2010	Forecast Fiscal year 2011	
	2010	2011		Nov	Feb
	<b>VALUE</b> <span style="float: right;">--- Billion dollars ---</span>				
Livestock, dairy, & poultry	2.577	2.830	10.843	11.5	11.7
Livestock and meats	1.809	1.978	7.947	8.5	8.5
Cattle and calves	0.380	0.439	1.546	1.6	1.7
Swine	0.068	0.087	0.344	0.4	0.4
Beef and veal	0.593	0.575	2.851	3.1	2.9
Pork	0.267	0.319	1.162	1.2	1.3
Dairy products	0.663	0.726	2.417	2.5	2.7
Cheese	0.309	0.312	0.963	1.0	1.0
Grains and feed	1.874	2.048	7.484	8.2	8.0
Grain products	1.274	1.364	4.886	5.4	5.2
Oilseeds and products	1.214	1.478	5.269	5.6	6.1
Vegetable oils	0.880	1.045	3.784	4.0	4.3
Horticulture products	8.249	9.135	35.549	38.5	38.6
Fruits, fresh	1.394	1.538	6.803	7.5	7.4
Fruits, processed	0.753	0.913	3.276	3.5	3.8
Fruit juices	0.305	0.389	1.279	1.4	1.5
Nuts, whole and processed	0.390	0.458	1.332	1.5	1.5
Vegetables, fresh	1.101	1.250	5.180	5.8	5.7
Vegetables, processed	0.887	0.963	3.574	3.8	3.8
Wine	1.207	1.254	4.258	4.5	4.4
Malt beer	0.727	0.767	3.452	3.6	3.6
Essential oils	0.560	0.609	2.414	2.6	2.6
Cut flowers & nursery stock	0.323	0.363	1.441	1.6	1.6
Sugar & tropical products	3.926	5.222	18.317	20.3	22.0
Sweeteners & products	0.840	1.030	4.112	4.6	4.8
Confections	0.308	0.333	1.279	1.4	1.4
Cocoa and chocolate	1.063	1.067	4.239	4.7	4.4
Coffee beans & products	0.911	1.464	4.393	4.8	5.2
Rubber, natural	0.381	0.768	2.433	3.0	4.2
Other imports 1/	0.317	0.344	1.492	1.6	1.6
Total agricultural imports	18.155	21.057	78.953	85.5	88.0
<b>VOLUME</b> <span style="float: right;">--- Million metric tons ---</span>					
Wine 2/	0.274	0.271	0.972	1.1	1.1
Malt beer 2/	0.650	0.685	3.112	3.2	3.3
Fruit juices 2/	1.024	1.132	4.162	4.3	4.4
Cattle and calves 3/	0.630	0.688	2.251	2.1	2.1
Swine 3/	1.472	1.416	5.805	5.9	5.8
Beef and veal	0.181	0.146	0.804	0.9	0.8
Pork	0.097	0.095	0.374	0.4	0.4
Fruits, fresh	1.995	1.978	9.128	9.5	9.4
Fruits, processed	0.318	0.329	1.408	1.5	1.5
Vegetables, fresh	1.222	1.300	5.375	5.7	5.6
Vegetables, processed	0.721	0.752	2.927	3.1	3.1
Vegetable oils	0.815	0.802	3.456	3.6	3.6
Cocoa and chocolate	0.320	0.301	1.228	1.4	1.3
Coffee beans	0.276	0.344	1.276	1.4	1.5
Rubber, natural	0.201	0.232	0.914	1.0	1.1

Totals may not add due to rounding.

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

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

## Regional Imports

For the first time, 2011 U.S. agricultural imports from Asia are likely to exceed those from Europe and Eurasia. As unit values for tropical oils and other tropical products, such as cashew nuts, tea, dried vegetables, spices, and rubber, continue to rise, their export values commensurately expand. Fast emerging exporters in Southeast Asia are also challenging U.S. suppliers in South America in terms of gross export value to the United States. Indeed, Asia may likewise exceed Latin America (except Mexico) as suppliers of agricultural products to the United States in 2011, as in 2008. By itself, Southeast Asia shipped about \$2 billion less worth of agricultural products to the United States in 2010 than South America, but is expected to come closer this year. A total of \$600 million more in agricultural products are estimated to be shipped this year from South America compared with 2010. That amount is dwarfed by the \$1.8 billion more in exports expected from Southeast Asia this year.

By itself, Mexico is projected to export \$2.4 billion more agricultural products to the United States in 2011 than in 2010. Prominent among these exports are sugar, fresh fruits, and fresh vegetables. The projections for fresh fruits and vegetables are lowered by \$200 million this year because of the adverse effect of the worst freeze in the northern part of Mexico in a long time. Part of these lost sales by Mexico will be recovered from higher prices of sugar, coffee, cocoa, and beef exported to the United States. The higher import unit values for horticultural products from Mexico are attributed, in part, to the dollar's depreciation against the Mexican peso in 2010. But since import volumes for these products are up despite their higher prices (except for fruit juices and citrus fruits), U.S. demand for them is highly inelastic, or relatively insensitive to prices.

Table 6--U.S. agricultural imports: Value by region, fiscal years 2010-2011

Region and country	October -- December		Fiscal year 2010	Share of total 2010	Forecast	
	2010	2011			Fiscal year 2011	
					Nov	Feb
<b>VALUE</b>	<i>--- Billion dollars ---</i>			<i>Percent</i>	<i>--- Billion dollars ---</i>	
Western Hemisphere	9.451	11.195	42.883	54.3	47.6	49.0
Canada	3.605	4.166	15.682	19.9	17.5	17.7
Mexico	2.694	3.300	12.972	16.4	15.0	15.4
Central America	0.722	0.762	3.763	4.8	4.1	3.9
Costa Rica	0.231	0.289	1.248	1.6	1.4	1.5
Guatemala	0.280	0.285	1.381	1.7	1.5	1.4
Other Central America	0.210	0.188	1.134	1.4	1.3	1.1
Caribbean	0.098	0.099	0.577	0.7	0.6	0.6
South America	2.332	2.868	9.889	12.5	10.5	11.5
Argentina	0.279	0.350	1.088	1.4	1.3	1.3
Brazil	0.630	0.879	2.644	3.3	2.7	3.5
Chile	0.356	0.375	2.274	2.9	2.4	2.3
Colombia	0.449	0.574	1.854	2.3	2.0	2.2
Other South America	0.617	0.691	2.029	2.6	2.2	2.2
Europe and Eurasia	3.999	4.203	14.989	19.0	16.0	15.3
European Union-27 1/	3.754	3.951	14.152	17.9	15.0	14.5
Other Europe	0.226	0.234	0.774	1.0	0.9	0.8
Asia	3.040	3.909	14.055	17.8	14.9	16.8
East Asia	1.032	1.221	4.363	5.5	4.5	4.9
China	0.741	0.899	3.210	4.1	3.3	3.7
Other East Asia	0.291	0.322	1.153	1.5	1.2	1.2
Southeast Asia	1.662	2.232	8.052	10.2	8.6	9.8
Indonesia	0.517	0.772	2.631	3.3	2.9	3.5
Malaysia	0.297	0.422	1.604	2.0	1.8	2.1
Thailand	0.411	0.523	1.917	2.4	2.0	2.2
Other Southeast Asia	0.436	0.514	1.900	2.4	2.0	2.1
South Asia	0.346	0.456	1.640	2.1	1.8	2.0
India	0.314	0.408	1.498	1.9	1.6	1.8
Oceania	0.949	0.967	4.052	5.1	4.3	4.0
Australia	0.599	0.585	2.319	2.9	2.5	2.2
New Zealand	0.308	0.348	1.624	2.1	1.8	1.8
Africa	0.500	0.564	2.222	2.8	2.4	2.3
Sub-Saharan	0.441	0.485	1.947	2.5	2.0	2.0
Ivory Coast	0.219	0.177	0.908	1.1	0.9	0.7
Middle East	0.216	0.220	0.753	1.0	0.8	0.7
Turkey	0.139	0.139	0.422	0.5	0.5	0.4
World total	18.155	21.057	78.953	100.0	85.5	88.0

Totals may not add due to rounding.

1/ The former EU-25 plus Romania and Bulgaria.

Sources: U.S. Department of Agriculture and Bureau of Census, 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 2008-10					Forecast accuracy Fiscal 2008-10					Forecast accuracy
	Aug <sup>1</sup>	Nov	Feb	May	Aug <sup>2</sup>	Aug <sup>1</sup>	Nov	Feb	May	Aug <sup>2</sup>	
<b>Export value</b>	<i>Percent</i>					<i>"X" if error &lt; 5%</i>					<i>Percent</i>
Grains and feeds	22	13	8	5	1	-	-	-	X	X	40
Wheat	29	23	19	10	4	-	-	-	-	X	20
Rice	17	18	18	12	5	-	-	-	-	X	20
Coarse grains	25	13	7	4	2	-	-	-	X	X	40
Corn	24	13	7	4	1	-	-	-	X	X	40
Feeds and fodders	18	13	12	5	4	-	-	-	X	X	40
Oilseeds and products	23	20	13	6	1	-	-	-	-	X	20
Soybeans	24	21	13	7	2	-	-	-	-	X	20
Soybean meal	28	24	13	6	1	-	-	-	-	X	20
Soybean oil	43	24	26	6	5	-	-	-	-	X	20
Livestock, poultry, and dairy	19	13	9	5	1	-	-	-	X	X	40
Livestock products	17	11	6	4	1	-	-	-	X	X	40
Beef and veal	14	9	8	8	5	-	-	-	-	X	20
Pork	20	14	12	7	6	-	-	-	-	-	0
Beef and pork variety meats	29	26	21	11	12	-	-	-	-	-	0
Hides, skins, and furs	23	22	18	12	7	-	-	-	-	-	0
Poultry and products	12	12	14	6	4	-	-	-	-	X	20
Broiler meat	15	15	15	8	5	-	-	-	-	X	20
Dairy products	43	31	23	7	3	-	-	-	-	X	20
Tobacco, unmanufactured	11	11	0	6	3	-	-	X	-	X	40
Cotton	38	21	11	5	1	-	-	-	X	X	40
Seeds	14	11	10	5	3	-	-	-	X	X	40
Horticultural products	8	7	5	2	1	-	-	X	X	X	60
Fruits and vegetables, fresh	9	8	5	3	1	-	-	X	X	X	60
Fruits & veget., processed	12	7	5	4	2	-	-	X	X	X	60
Tree nuts, whole/processed	11	10	4	2	2	-	-	X	X	X	60
Sugar and tropical products	7	6	6	3	2	-	-	-	X	X	40
Major bulk products	25	13	9	5	1	-	-	-	X	X	40
Total agricultural exports	18	11	7	3	1	-	-	-	X	X	40
Average error and accuracy	21	15	11	6	3	0%	0%	17%	52%	90%	32
<b>Export volume</b>											
Wheat	12	11	13	8	3	-	-	-	-	X	20
Rice	15	13	9	4	3	-	-	-	X	X	40
Coarse grains	7	2	3	4	1	-	X	X	X	X	80
Corn	7	3	3	4	1	-	X	X	X	X	80
Feeds and fodders	18	15	12	6	6	-	-	-	-	-	0
Soybeans	17	16	10	4	3	-	-	-	X	X	40
Soybean meal	11	9	6	2	4	-	-	-	X	X	40
Soybean oil	25	15	20	3	3	-	-	-	X	X	40
Beef and veal	10	10	6	6	0	-	-	-	-	X	20
Pork	23	14	11	5	7	-	-	-	X	-	20
Beef and pork variety meats	19	14	14	5	10	-	-	-	X	-	20
Broiler meat	12	12	11	9	2	-	-	-	-	X	20
Tobacco, unmanufactured	0	0	0	0	0	X	X	X	X	X	100
Cotton	20	13	9	2	1	-	-	-	X	X	40
Major bulk products	6	4	4	2	1	-	X	X	X	X	80
Average error and accuracy	13	10	9	4	3	7%	27%	27%	73%	80%	43

<sup>1</sup> Forecast made for following fiscal year, with 15 months out. <sup>2</sup> 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 2008-10					Forecast accuracy Fiscal 2008-10					Forecast accuracy
	Aug <sup>1</sup>	Nov	Feb	May	Aug <sup>2</sup>	Aug <sup>1</sup>	Nov	Feb	May	Aug <sup>2</sup>	
<b>Export value</b>	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					
Asia	20	15	14	8	1	-	-	-	-	X	20
East Asia	20	14	14	7	2	-	-	-	-	X	20
Japan	14	8	7	6	3	-	-	-	-	X	20
China	21	21	21	7	7	-	-	-	-	-	0
Hong Kong	25	21	16	10	2	-	-	-	-	X	20
Taiwan	21	7	3	4	3	-	-	X	X	X	60
South Korea	33	26	19	13	1	-	-	-	-	X	20
Southeast Asia	22	22	17	14	4	-	-	-	-	X	20
Indonesia	25	21	16	10	3	-	-	-	-	X	20
Philippines	31	24	13	5	5	-	-	-	X	X	40
Malaysia	18	8	25	21	6	-	-	-	-	-	0
Thailand	20	16	10	10	0	-	-	-	-	X	20
South Asia	20	12	9	7	6	-	-	-	-	-	0
Western Hemisphere	13	7	5	4	2	-	-	X	X	X	60
North America	12	6	4	3	1	-	-	X	X	X	60
Canada	11	7	3	2	1	-	-	X	X	X	60
Mexico	15	6	6	5	3	-	-	-	X	X	40
Caribbean	14	14	10	8	4	-	-	-	-	X	20
Central America	11	10	8	7	2	-	-	-	-	X	20
South America	31	18	12	9	5	-	-	-	-	X	20
Brazil	42	29	25	25	5	-	-	-	-	X	20
Colombia	30	26	14	13	11	-	-	-	-	-	0
Venezuela	31	26	16	12	6	-	-	-	-	-	0
Europe and Eurasia	21	10	8	7	2	-	-	-	-	X	20
European Union-27	24	12	13	9	2	-	-	-	-	X	20
Other Europe	15	34	28	29	6	-	-	-	-	-	0
FSU-12	23	16	13	9	9	-	-	-	-	-	0
Russia	26	26	23	20	14	-	-	-	-	-	0
Middle East	23	15	8	7	2	-	-	-	-	X	20
Turkey	29	16	14	13	8	-	-	-	-	-	0
Saudi Arabia	27	22	9	16	3	-	-	-	-	X	20
Africa	30	21	6	7	2	-	-	-	-	X	20
North Africa	53	36	10	10	8	-	-	-	-	-	0
Egypt	31	22	14	14	4	-	-	-	-	X	20
Sub-Saharan	18	15	8	6	7	-	-	-	-	-	0
Oceania	14	13	11	8	0	-	-	-	-	X	20
Transshipments via Canada	39	28	28	28	22	-	-	-	-	-	0
Average error and accuracy	24	18	13	11	5	0%	0%	11%	16%	68%	19

<sup>1</sup> Forecast made for following fiscal year, with 15 months out. <sup>2</sup> 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 2008-10					Forecast accuracy Fiscal 2008-10					Forecast accuracy
	Aug <sup>1</sup>	Nov	Feb	May	Aug <sup>2</sup>	Aug <sup>1</sup>	Nov	Feb	May	Aug <sup>2</sup>	
<b>Import value</b>	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Livestock, dairy, and poultry	10	6	4	4	2	-	-	X	X	X	60
Livestock and red meats	8	6	3	4	3	-	-	X	X	X	60
Cattle and calves	20	6	3	5	0	-	-	X	X	X	60
Swine	29	29	24	18	11	-	-	-	-	-	0
Beef and veal	12	9	6	6	3	-	-	-	-	X	20
Pork	12	12	9	9	3	-	-	-	-	X	20
Dairy products	19	14	9	7	5	-	-	-	-	X	20
Cheese	16	9	7	3	3	-	-	-	X	X	40
Grains and feed	13	9	10	7	2	-	-	-	-	X	20
Grain products	6	6	6	3	1	-	-	-	X	X	40
Oilseeds and products	30	15	24	14	5	-	-	-	-	X	20
Vegetable oils	29	14	23	17	5	-	-	-	-	X	20
Horticulture products	4	5	4	2	1	X	X	X	X	X	100
Fruits--fresh	7	7	3	2	0	-	-	X	X	X	60
Fruits--processed	16	13	9	7	2	-	-	-	-	X	20
Fruit juices	28	21	18	11	3	-	-	-	-	X	20
Nuts--whole and processed	13	11	5	5	3	-	-	X	X	X	60
Vegetables--fresh	8	8	9	1	0	-	-	-	X	X	40
Vegetables--processed	3	3	3	3	0	X	X	X	X	X	100
Wine	9	6	3	3	1	-	-	X	X	X	60
Malt beer	9	5	3	2	4	-	X	X	X	X	80
Essence oils	12	9	8	3	1	-	-	-	X	X	40
Cut flowers & nursery stock	7	5	2	5	2	-	X	X	X	X	80
Sugar and tropical products	7	11	12	8	5	-	-	-	-	X	20
Cane and beet sugar	23	28	28	19	12	-	-	-	-	-	0
Confections	8	8	3	3	0	-	-	X	X	X	60
Cocoa and chocolate	9	9	10	6	4	-	-	-	-	X	20
Coffee beans and products	10	10	7	2	2	-	-	-	X	X	40
Rubber--natural	29	35	37	41	16	-	-	-	-	-	0
Total agricultural imports	7	6	6	5	2	-	-	-	X	X	40
Average error and accuracy	14	11	10	7	3	6%	13%	35%	58%	90%	41
<b>Import volume</b>											
Wine (HL)	15	12	4	4	4	-	-	X	X	X	60
Malt beer (HL)	15	7	3	4	2	-	-	X	X	X	60
Fruit juices (HL)	2	10	5	10	4	X	-	X	-	X	60
Cattle and calves	16	3	3	3	3	-	X	X	X	X	80
Swine	8	4	6	4	0	-	X	-	X	X	60
Beef and veal	21	20	13	8	0	-	-	-	-	X	20
Pork	0	0	8	8	8	X	X	-	-	-	40
Fruits--fresh	5	4	4	6	2	X	X	X	-	X	80
Fruits--processed	10	5	2	2	2	-	X	X	X	X	80
Vegetables--fresh	6	6	7	6	1	-	-	-	-	X	20
Vegetables--processed	8	5	2	1	0	-	X	X	X	X	80
Vegetable oils	7	6	7	6	1	-	-	-	-	X	20
Cocoa and chocolate	12	9	6	3	3	-	-	-	X	X	40
Coffee beans	13	8	5	3	3	-	-	X	X	X	60
Rubber--natural	21	17	14	21	13	-	-	-	-	-	0
Average error and accuracy	11	8	6	6	3	20%	40%	53%	53%	87%	51

<sup>1</sup> Forecast made for following fiscal year, with 15 months out. <sup>2</sup> 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 2008-10					Forecast accuracy Fiscal 2008-10					Forecast accuracy
	Aug <sup>1</sup>	Nov	Feb	May	Aug <sup>2</sup>	Aug <sup>1</sup>	Nov	Feb	May	Aug <sup>2</sup>	
<b>Import value</b>	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Western Hemisphere	6	5	5	4	2	-	X	X	X	X	80
Canada	16	12	10	8	3	-	-	-	-	X	20
Mexico	5	5	4	1	2	X	X	X	X	X	80
Central America	4	5	7	8	1	X	X	-	-	X	40
Costa Rica	14	6	6	9	3	-	-	-	-	X	20
Guatemala	8	5	10	10	5	-	X	-	-	X	40
Other Central America	20	13	13	13	3	-	-	-	-	X	20
Caribbean	29	15	8	6	0	-	-	-	-	X	20
South America	5	3	5	2	1	X	X	X	X	X	80
Argentina	36	9	17	13	13	-	-	-	-	-	0
Brazil	5	3	4	5	4	X	X	X	X	X	80
Chile	7	8	10	5	2	-	-	-	X	X	40
Colombia	0	2	4	2	0	X	X	X	X	X	80
Other South America	22	7	7	2	0	-	-	-	X	X	40
Europe and Eurasia	9	6	4	2	1	-	-	X	X	X	60
European Union-27	9	7	3	2	1	-	-	X	X	X	60
Other Europe	21	13	30	21	8	-	-	-	-	-	0
Asia	12	13	15	13	6	-	-	-	-	-	0
East Asia	6	10	9	5	3	-	-	-	X	X	40
China	8	11	10	4	2	-	-	-	X	X	40
Other East Asia	3	6	6	6	6	X	-	-	-	-	0
Southeast Asia	15	15	20	18	8	-	-	-	-	-	0
Indonesia	18	22	26	24	12	-	-	-	-	-	0
Malaysia	13	6	30	29	13	-	-	-	-	-	0
Thailand	10	12	16	16	6	-	-	-	-	-	0
Other Southeast Asia	17	14	12	7	0	-	-	-	-	X	20
South Asia	17	12	17	13	4	-	-	-	-	X	20
India	17	12	17	17	7	-	-	-	-	-	0
Oceania	10	6	8	10	5	-	-	-	-	X	20
Australia	13	8	7	6	4	-	-	-	-	X	20
New Zealand	12	8	8	16	6	-	-	-	-	-	0
Africa	8	11	10	7	4	-	-	-	-	X	20
Sub-Sahara	9	9	9	6	2	-	-	-	-	X	20
Ivory Coast	17	11	17	7	4	-	-	-	-	X	20
Middle East	8	4	4	0	4	-	X	X	X	X	80
Turkey	15	15	15	8	0	-	-	-	-	X	20
Average error and accuracy	12	9	11	9	4	17%	22%	22%	33%	72%	30

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

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### Related Websites

Outlook for U.S. Agricultural Trade

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

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

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

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

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

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

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