

Outlook for U.S. Agricultural Trade

FY 2017 Exports Forecast Up \$1.0 Billion to \$137.0 Billion; Imports Unchanged at \$114.5 Billion

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The next release is
August 29, 2017

Approved by the
World Agricultural
Outlook Board.

Fiscal year 2017 agricultural exports are projected at \$137.0 billion, up \$1.0 billion from the February forecast, as increases are expected in livestock, grain/feed, and cotton exports. Livestock, poultry, and dairy exports are raised \$600 million to \$28.7 billion due to an expected increase in red meat shipments that more than offsets slight declines in the poultry and dairy forecasts. Grain and feed exports are forecast at \$29.0 billion, up \$400 million, driven by a larger volume for wheat and higher unit values for rice. Cotton is forecast up \$400 million to \$5.4 billion as the United States continues to gain market share across major markets. Oilseed and product exports are forecast at \$31.7 billion, up \$100 million due to expected increased soybean product exports. The export forecast for horticultural products is down \$500 million to \$33.5 billion on the basis of lower unit values of tree nuts.

U.S. agricultural imports in fiscal year 2017 are forecast at \$114.5 billion, unchanged from February and \$1.4 billion above their total value in fiscal year 2016. The U.S. agricultural trade surplus is expected to increase \$1 billion to \$22.5 billion.

Table 1--U.S. agricultural trade, fiscal years 2011-17, year ending September 30

Item	2011	2012	2013	2014	2015	2016	Forecast fiscal year*	
							2017	
							Feb.	May
Billion dollars								
Exports	137.5	135.9	141.1	152.3	139.7	129.7	136.0	137.0
Imports	94.5	103.4	103.9	109.3	114.2	113.1	114.5	114.5
Balance	43.0	32.5	37.3	43.1	25.5	16.6	21.5	22.5

*Reflect forecasts in the May 10, 2017, *World Agricultural Supply and Demand Estimates* report.

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

Upward pressure on dollar abates as the global economy recovers

World per capita GDP growth is expected to reach 1.6 percent in 2017 compared with 1.2 percent in 2016. This increase reflects a broad-based upswing in the world economy across both developed and developing countries. In the key emerging markets of Brazil, Russia, India, Indonesia, and China, per capita GDP growth is expected to accelerate to 4.3 percent, on average, after growth of 3.7 percent in 2016, largely due to the end of recessions in Russia and Brazil. Growth in global trade volume, at 1.8 percent in 2016, is expected to rebound to 5 percent in 2017. Year-to-year trade growth of 5 percent in February was the fastest since 2011.

After strengthening 4 percent between October 2016 and January 2017, the dollar has begun to weaken in recent weeks. It is expected to trend weaker by almost 2 percent in 2017, but to remain strong relative to the period before the dollar's dramatic strengthening at the end of 2015. The weaker dollar reflects improvements in the economic outlook of key U.S. trading partners and reduced expectations for fiscal stimulus in the United States.

The stronger-than-expected performance of the Mexican economy in early 2017 and an improved outlook for its relationship with the United States have reversed earlier expectations of continued dollar strengthening relative to the peso. Expectations for the dollar to strengthen relative to the euro and the Chinese renminbi have likewise been scaled back due to the strong performance of these economies in late 2016 and early 2017. While sources of upward pressure on the dollar remain, notably expected increases in U.S. interest rates, they are assumed to be fully reflected in the dollar's market value and are thus not expected to drive further dramatic strengthening.

Oil prices are expected to remain stable in 2017. OPEC production limits (plus cuts by its non-OPEC partners) have brought oil's price up from the 2016 average of \$43.74 per barrel. The U.S. Energy Information Administration forecasts a Brent crude spot price of \$52.60 per barrel for 2017, about equal to current levels. However, this forecast was made before the recent announcement from Saudi Arabia and Russia that they intend to extend production limits through March 2018—an action that other OPEC members are expected to take as well. This may put some upward pressure on prices but is not expected to result in dramatic increases.

Per capita income growth is expected to increase across North America in 2017. U.S. income growth is expected to be 1.5 percent in 2017 as the employment picture continues to improve, consumption expands, and fiscal stimulus increases investment. The rebound in oil prices is expected to lift Canadian per capita economic growth to 1.3 percent in 2017, compared to 0.6 percent in 2016. Despite concerns early in the year, Mexican income growth is expected to remain unchanged at 0.6 percent in 2017.

Per capita income growth in Asia and Oceania is expected to be stable at 3.5 percent in 2016 and 2017. Government policy support in China facilitated 6.3-percent income growth in 2016; as support is withdrawn, growth is expected to slow to 5.9

percent in 2017. Continued modest dollar strengthening relative to the renminbi is anticipated as the Chinese economy slows; however, the government is expected to continue intervening as necessary to prevent a dramatic depreciation. Indian income growth is likewise expected to be robust at over 6 percent in 2017. Demonetization measures slowed the Indian economy at the end of 2016, resulting in 5.7-percent growth for the year as a whole. Continued growth is expected in the rest of South and Southeast Asia, despite some political risks and slowing growth in commodity demand from China.

Although Latin America is expected to emerge from recession, economic growth will be very slow in 2017. The dollar is expected to weaken on average against the Brazilian real and Argentine peso in 2017 as these currencies regain value lost since 2015. However, developments in Brazilian politics may slow or possibly reverse the appreciation of the real in 2017. While positive aggregate GDP growth is expected in 2017, it is not projected to be strong enough to reverse declining per capita incomes. Unlike its neighbors, Venezuela remains in an extremely precarious economic situation as political unrest continues.

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

Region/Country 3/	Real exchange rate 2/		Real GDP per capita		Share of World		Share of U.S.
	2016	2017	2016	2017	GDP	Population	Ag. exports
	Percent change		Growth rate		2013-15 Average		
World	1.0	0.1	1.2	1.6	100.0	100.0	100.0
NAFTA	8.2	0.1	0.7	1.3	26.5	6.7	28.0
United States	--	--	0.8	1.5	22.4	4.5	--
Canada	3.4	1.4	0.6	1.3	2.4	0.5	15.0
Mexico	16.0	-1.9	0.6	0.6	1.6	1.7	12.9
Emerging Markets	2.7	-2.5	3.7	4.3	21.2	44.9	20.4
Brazil	-2.3	-7.7	-4.2	-0.3	3.3	2.8	0.9
Russia	4.1	-15.8	-0.5	1.1	2.3	2.0	0.6
India	1.1	-4.5	5.7	6.0	3.0	17.4	0.7
Indonesia	-2.8	-1.5	4.1	4.2	1.3	3.6	1.8
China	6.1	4.8	6.3	5.9	11.3	19.1	16.3
Europe & Central Asia	3.8	1.0	1.3	1.4	28.7	11.6	9.8
Euro Zone	0.9	2.1	1.4	1.3	17.6	9.0	6.7
Ukraine	3.9	1.2	1.6	2.9	0.2	0.6	0.1
Turkey	4.3	12.6	0.9	1.5	1.2	1.1	1.3
Asia & Oceania	0.3	2.9	3.5	3.5	31.0	55.0	44.4
Japan	-8.9	6.6	1.2	1.3	7.8	1.8	8.5
South Korea	2.9	-2.2	2.2	2.0	1.7	0.7	4.3
Australia	1.0	-0.2	1.2	0.9	1.8	0.3	1.0
Other SE Asia 4/	4.0	1.6	3.5	3.4	1.5	4.0	5.1
Latin America	5.1	-2.5	-2.3	0.2	8.1	8.6	10.1
Argentina	14.7	-15.2	-3.2	1.6	0.7	0.6	0.1
Other S. America 5/	3.3	-5.9	1.3	1.7	3.2	1.6	2.9
Middle East & N. Africa	3.1	20.2	0.8	1.4	5.2	5.1	6.0
Sub-Saharan Africa	7.9	-1.2	-0.2	0.7	2.2	13.1	1.6

1/ Real values have a 2010 base year.

2/ Local currency per U.S. dollar. A negative growth rate indicates a depreciation of the dollar. World real exchange rate is a U.S. agricultural exports-weighted index.

3/ Regional values for Real Exchange rates are growth in GDP-weighted average of country real exchange rate index.

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

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

Source: Calculations and compilation by U.S. Dept. of Agriculture, Economic Research Service using data and forecasts from Global Insight, the IMF, and Oxford Economics.

Export Products

U.S. grain and feed exports in fiscal 2017 are forecast at \$29.0 billion, up \$400 million from the February forecast, driven by a larger volume for wheat and higher unit values for rice. Exports of coarse grains are forecast down \$100 million from the previous projection to \$10.3 billion, as corn is forecast down \$100 million to \$9.4 billion based on lower volume. Record exportable supplies of corn in South America are expected to erode U.S. competitiveness this summer. Sorghum exports remain unchanged at \$900 million, based on steady demand from China and Mexico. Feeds and fodders are forecast up \$200 million to \$6.2 billion based on larger volume, primarily for DDGS (Distillers' Dried Grains with Solubles). DDGS exports to Mexico, Turkey, South Korea, and Thailand have strengthened, more than offsetting the decrease in exports to China following that country's imposition of punitive duties on DDGS from the United States.

U.S. wheat exports are forecast at \$6.2 billion in fiscal 2017, up \$100 million from the February forecast on larger volumes despite lower unit values. Volume is up based on strong exports in recent months, particularly to Mexico. Unit value is down slightly on weaker new-crop prices. The size of the upcoming U.S. wheat crop is still forecast to be smaller than last year's, but abundant carryin supplies in the United States and other exporting countries are expected to restrain prices. Rice exports are forecast at \$1.8 billion, up \$100 million due to higher anticipated unit values. Value is up on prices that are higher than previously expected and expectations of increased prices on a smaller U.S. crop in 2017.

Oilseed and oilseed product exports are forecast at \$31.7 billion in fiscal 2017, up \$100 million from the February forecast, mainly on increased soybean products trade. The soybean export value is expected to be unchanged at \$22.6 billion, while soybean meal and soybean oil are expected to see gains in export value. The generally stronger Brazilian real and Argentine peso so far this year have supported U.S. competitiveness in the soybean and products markets. Buoyed by increased sales to China, Brazilian soybean exports are ahead of last year's pace.

Cotton exports are forecast at \$5.4 billion, up \$400 million from February. Export volume is forecast up 300,000 tons to 3.1 million. With global demand projected slightly higher, import demand has risen in China and Indonesia, while exports are projected lower for Australia and Uzbekistan. The U.S. share of world trade is also supported by the lingering effects of India's demonetization policy, which have resulted in both higher imports and lower exports than expected previously.

Livestock, poultry, and dairy exports are raised \$600 million to \$28.7 billion, almost entirely due to higher anticipated shipments of red meat and products. Beef exports are raised \$200 million to \$6.0 billion and pork exports are raised \$400 million to \$5.4 billion due to growth in export volumes to several countries in Asia and Mexico. Unit values are slightly higher than last month on improved demand. Variety meat exports are forecast \$100 million higher to \$1.9 billion due to a surge in shipments to Hong Kong and China. Lard, tallow, and grease shipments continue to benefit from robust global demand, driving volumes higher. Greater volumes of live animal shipments are expected. U.S. exports of poultry and poultry products are forecast \$100 million lower to \$4.7 billion due to lower unit values for broiler meat. Although dairy exports have been growing in volume, the dairy export forecast is

lowered slightly by \$100 million this month to \$5.4 billion as forecasted prices for such key commodities as nonfat dry milk and cheese have been reduced.

The forecast for exports of U.S. horticultural products is lowered \$500 million to \$33.5 billion for fiscal 2017. Forecast exports of whole and processed tree nuts are cut \$500 million to \$8.5 billion. Record almond stocks and ample pistachio inventories have pressured unit values lower, more than offsetting higher overseas demand from top markets Europe and China. Fresh fruit and vegetable exports are forecast unchanged at \$6.8 billion, with top markets including Canada, Europe, and Japan. Processed fruit and vegetable exports are forecast unchanged at \$7.3 billion.

Table 3--U.S. agricultural exports: Value and volume by commodity, fiscal years 2016-2017

Commodity	October -March		Fiscal year 2016	Forecast	
	2016	2017		Fiscal year 2017	
				Feb.	May
VALUE					
	---Billion dollars---				
Grains and feeds 1/	13.097	15.197	29.703	28.6	29.0
Wheat 2/	2.180	2.719	5.138	6.1	6.2
Rice	0.926	1.005	1.900	1.7	1.8
Coarse grains 3/	4.175	5.603	10.791	10.4	10.3
Corn	3.126	4.959	9.154	9.5	9.4
Feeds and fodders	3.597	3.669	7.454	6.0	6.2
Oilseeds and products 4/	19.231	23.057	29.485	31.6	31.7
Soybeans	14.665	18.058	20.435	22.6	22.6
Soybean meal 5/	2.133	2.301	4.173	4.0	4.1
Soybean oil	0.471	0.568	0.842	0.8	0.9
Livestock, poultry, and dairy	12.416	14.190	25.563	28.1	28.7
Livestock products	7.964	9.233	16.445	17.8	18.6
Beef and veal 6/	2.453	2.962	5.186	5.8	6.0
Pork 6/	2.260	2.667	4.748	5.0	5.4
Beef and pork variety meats 6/	0.750	0.920	1.585	1.8	1.9
Hides, skins, and furs	0.945	0.967	1.889	2.0	2.0
Poultry and products	2.166	2.353	4.543	4.8	4.7
Broiler meat 6/ 7/	1.299	1.428	2.777	2.9	2.8
Dairy products	2.286	2.604	4.576	5.5	5.4
Tobacco, unmanufactured	0.726	0.622	1.046	1.1	1.0
Cotton	1.458	3.035	3.443	5.0	5.4
Seeds	0.978	1.115	1.601	1.5	1.8
Horticultural products 8/	16.480	17.371	32.867	34.0	33.5
Fruits and vegetables, fresh	3.191	3.264	6.993	6.8	6.8
Fruits and vegetables, processed 8/	3.641	3.724	7.400	7.3	7.3
Tree nuts, whole and processed	4.364	4.821	7.542	9.0	8.5
Sugar and tropical products 9/	2.944	2.886	6.010	6.0	6.0
Major bulk products 10/	24.130	31.042	42.754	47.0	47.3
Total	67.334	77.480	129.726	136.0	137.0
VOLUME					
	---Million metric tons---				
Wheat 2/	9.029	12.194	22.458	27.0	28.0
Rice	1.777	2.351	3.900	4.1	4.1
Coarse grains 3/	22.229	31.843	59.195	62.5	62.0
Corn	17.236	28.182	51.135	56.5	56.0
Feeds and fodders	10.524	11.193	22.277	20.8	21.8
Soybeans	40.169	44.492	54.105	55.8	55.8
Soybean meal 5/	5.862	6.070	10.853	10.5	11.0
Soybean oil	0.567	0.683	1.016	1.0	1.0
Beef and veal 6/	0.377	0.460	0.800	0.9	0.9
Pork 6/	0.856	0.980	1.732	1.9	2.0
Beef and pork variety meats 6/	0.368	0.442	0.764	0.9	0.9
Broiler meat 6/ 7/	1.392	1.562	2.908	3.1	3.1
Tobacco, unmanufactured	0.103	0.090	0.157	0.2	0.1
Cotton	0.911	1.728	2.191	2.8	3.1
Major bulk products 10/	74.219	92.698	142.005	152.4	153.1
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. Note: February forecast figure has been corrected to reflect sum of products

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

Regional Exports

U.S. agricultural exports in fiscal year 2017 are forecast at \$137.0 billion, \$1.0 billion higher than the February forecast, in large part due to an expected increase in Asian demand.

Asia

U.S. agricultural exports to East Asia were strong in the first half of the 2017 fiscal year. Supported by increased demand for beef, pork, and other consumer-oriented products, U.S. exports to Japan are forecast up \$300 million this month to \$11.5 billion. Exports to South Korea are forecast up \$300 million to \$6.7 billion due to strong demand for beef, pork, and DDGS.

In Southeast Asia, export forecasts for Indonesia and Vietnam are up \$200 million and \$300 million, respectively. U.S. agricultural exports to Indonesia are forecast at \$2.9 billion due to strong sales of cotton and feeds/fodders. Corresponding exports to Vietnam are forecast at \$2.7 billion based on increased cotton and tree nut shipments.

The forecast for South Asia was increased by \$100 million to \$2.6 billion on strong cotton sales.

Western Hemisphere

Forecast exports to North America are lowered \$100 million this month to \$39.5 billion. Forecast exports to Canada are reduced by \$300 million to \$21.0 billion, as demand for consumer-oriented products was not as strong as previously expected. This decline is partially offset by a \$200-million increase in forecast exports to Mexico, now at \$18.5 billion, based on stronger demand for red meats, wheat, and DDGS.

In South America, U.S. agricultural exports to Colombia are forecast up \$200 million to \$2.5 billion due to continued strong sales of bulk commodities and further growth in consumer-oriented products.

Europe, Africa, and the Middle East

The U.S. export forecast for the European Union (EU) is down \$200 million this month to \$11.7 billion, based on lower unit values for tree nuts. The forecasts for Turkey and Saudi Arabia are both raised by \$100 million to \$1.4 billion and \$1.3 billion, respectively. DDGS sales to Turkey are expected to push overall exports higher, while bulk commodity shipments to Saudi Arabia have been stronger than anticipated. The U.S. export forecast for Africa remains unchanged at \$3.2 billion.

Table 4--U.S. agricultural exports: Value by region, fiscal years 2016-2017

Country and region 1/	October - March		Fiscal year 2016	Share of	Forecast	
	2016	2017		2016	Fiscal year 2017	
				total	Feb.	May
	-- \$ Billion --			Percent	-- \$ Billion --	
VALUE						
Asia	29.992	38.017	54.854	42.3	59.9	61.1
East Asia	24.062	29.888	42.087	32.4	46.8	47.4
Japan	4.848	5.813	10.614	8.2	11.2	11.5
China	13.211	16.228	19.171	14.8	22.3	22.3
Hong Kong	1.871	2.291	3.505	2.7	3.6	3.6
Taiwan	1.518	1.858	3.080	2.4	3.3	3.3
South Korea	2.611	3.695	5.708	4.4	6.4	6.7
Southeast Asia	4.862	6.487	10.273	7.9	10.7	11.2
Indonesia	1.059	1.573	2.386	1.8	2.7	2.9
Philippines	1.177	1.358	2.461	1.9	2.5	2.5
Malaysia	0.393	0.454	0.800	0.6	0.9	0.9
Thailand	0.835	1.054	1.470	1.1	1.6	1.6
Vietnam	1.040	1.570	2.355	1.8	2.4	2.7
South Asia	1.068	1.642	2.494	1.9	2.5	2.6
India	0.524	0.706	1.246	1.0	1.3	1.3
Western Hemisphere	24.859	26.283	51.463	39.7	52.7	52.8
North America	18.549	18.980	37.994	29.3	39.6	39.5
Canada	9.883	9.804	20.338	15.7	21.3	21.0
Mexico	8.666	9.176	17.656	13.6	18.3	18.5
Caribbean	1.633	1.826	3.278	2.5	3.4	3.4
Dominican Republic	0.542	0.676	1.110	0.9	1.1	1.1
Central America	1.876	1.987	3.809	2.9	3.7	3.7
South America	2.800	3.490	6.382	4.9	6.2	6.4
Brazil	0.280	0.426	0.803	0.6	0.9	0.9
Colombia	1.114	1.447	2.251	1.7	2.3	2.5
Peru	0.514	0.602	1.138	0.9	1.0	1.0
Venezuela	0.187	0.188	0.653	0.5	0.4	0.4
Europe/Eurasia	7.250	7.027	12.797	9.9	13.0	12.8
European Union-28 2/	6.549	6.582	11.645	9.0	11.9	11.7
Other Europe 3/	0.353	0.259	0.614	0.5	0.7	0.7
FSU-12 4/	0.348	0.186	0.537	0.4	0.4	0.4
Russia	0.273	0.101	0.370	0.3	0.3	0.3
Middle East	2.899	3.302	5.480	4.2	5.5	5.7
Turkey	0.793	0.908	1.366	1.1	1.3	1.4
Saudi Arabia	0.633	0.923	1.296	1.0	1.2	1.3
Africa	1.436	1.923	3.315	2.6	3.2	3.2
North Africa	0.662	0.978	1.635	1.3	1.5	1.5
Egypt	0.377	0.377	0.776	0.6	0.8	0.8
Sub-Saharan Africa	0.774	0.945	1.680	1.3	1.7	1.7
Nigeria	0.183	0.227	0.396	0.3	0.4	0.4
Oceania	0.142	0.157	1.817	1.4	1.9	1.9
Trans-shipments via Canada 5/	0.000	0.000	0.000	0.0	0.0	0.0
Total	67.334	77.480	129.726	100.0	136.0	137.0

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, which acceded in January 2007, and Croatia which acceded in July 2013.

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

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

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

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

Import Products

U.S. agricultural imports in fiscal year 2017 are forecast at \$114.5 billion, unchanged from February and \$1.4 billion above the fiscal year 2016 total. Expected increases in imports of oilseeds and sugar/tropical products are offset by lower imports of horticultural and livestock/dairy products.

Horticultural product imports are expected to reach a new record of \$54.1 billion in fiscal year 2017, though this represents a downward adjustment of \$300 million from the previous forecast. Fresh vegetable imports are reduced \$300 million, as falling average import unit values drag down total values despite higher expected volumes. Processed fruit imports are expected to fall short of last quarter's expectations by \$100 million due to an expected slowdown in import volumes from foreign suppliers. However, import demand for processed vegetables is expected to rise, resulting in a projected \$100-million increase for current fiscal year 2017. Increased projected imports of wine have led to an adjusted value of \$100 million above the previous wine import forecast.

U.S. imports of sugar and tropical products are forecast to reach \$23.3 billion in fiscal year 2017, a \$300-million upward adjustment from the February forecast and \$1.1 billion above the fiscal year 2016 level. Coffee product imports are expected to total \$6.4 billion, up \$200 million from the last projection, due to larger than expected volume. Imports of sweeteners and products are forecast to equal \$4.7 billion, a \$100-million decrease from the previous forecast, because of diminished expectations for products such as confections. Natural rubber imports are projected to increase \$200 million to \$1.5 billion in response to slightly higher shipments and unit values.

The fiscal year 2017 livestock, dairy, and poultry import forecast is lowered \$200 million from the February forecast to \$15.6 billion. Higher domestic beef and cattle production has reduced demand for imported beef from Oceania and cattle from Canada and Mexico. Although import volumes remain steady, unit values for imported beef have fallen, reducing the forecast by \$100 million. The forecast for dairy imports is lowered by \$100 million to \$3.4 billion due to reductions across a range of dairy products.

Imports of oilseeds and oilseed products are forecast at \$8.8 billion, \$200 million more than the previous forecast, due to projected increases in both U.S. demand and world production of vegetable oils. Total grains and feed imports for fiscal year 2017 are expected to remain unchanged from the February forecast at \$10.9 billion.

Table 5--U.S. agricultural imports: Value and volume by commodity, fiscal years 2016-2017

Commodity	October - March		Fiscal year 2016	Forecast	
	2016	2017		Fiscal year 2017	
				Feb.	May
VALUE					
	---Billion dollars---				
Livestock, dairy, & poultry	8.575	7.877	16.609	15.8	15.6
Livestock and meats	6.311	5.801	12.372	11.4	11.3
Cattle and calves	0.977	0.829	1.747	1.5	1.5
Swine	0.180	0.155	0.336	0.3	0.3
Beef and veal	2.569	2.249	5.380	4.8	4.7
Pork	0.882	0.842	1.706	1.6	1.6
Dairy products	1.754	1.703	3.371	3.5	3.4
Cheese	0.698	0.616	1.275	1.4	1.4
Grains and feed	5.474	5.495	10.935	10.9	10.9
Grain products	3.553	3.809	7.288	7.4	7.4
Oilseeds and products	4.013	4.540	8.453	8.6	8.8
Vegetable oils	2.547	2.972	5.420	5.6	5.8
Horticulture products	27.085	28.624	53.075	54.4	54.1
Fruits, fresh	5.947	6.702	11.228	11.7	11.7
Fruits, processed	2.524	2.528	5.123	5.2	5.1
Fruit juices	0.907	0.992	1.761	1.8	1.8
Nuts, whole and processed	1.338	1.578	2.607	2.9	2.9
Vegetables, fresh	4.619	4.211	7.999	7.9	7.6
Vegetables, processed	2.316	2.561	4.650	4.8	4.9
Wine	2.767	2.968	5.623	5.7	5.8
Malt beer	2.252	2.314	4.812	4.9	4.9
Essential oils	1.615	1.750	3.359	3.5	3.5
Cut flowers & nursery stock	0.927	0.954	1.813	1.8	1.8
Sugar & tropical products	10.733	11.729	22.217	23.0	23.3
Sweeteners & products	2.176	2.251	4.649	4.8	4.7
Confections	0.869	0.851	1.734	1.8	1.7
Cocoa and products	2.513	2.804	4.879	5.3	5.3
Coffee and products	2.815	3.203	5.934	6.2	6.4
Rubber, natural	0.629	0.726	1.306	1.3	1.5
Other imports 1/	0.926	0.946	1.819	1.8	1.8
Total agricultural imports	56.806	59.212	113.109	114.5	114.5
VOLUME					
	---Million metric tons---				
Wine 2/	0.607	0.648	1.200	1.2	1.2
Malt beer 2/	1.786	1.856	3.859	3.9	3.9
Fruit juices 2/	2.358	2.370	4.514	4.5	4.5
Cattle and calves 3/	0.978	0.999	1.737	1.7	1.7
Swine 3/	2.995	2.862	5.775	5.8	5.8
Beef and veal	0.473	0.454	1.005	0.9	0.9
Pork	0.263	0.239	0.493	0.5	0.5
Fruits, fresh	5.750	6.014	11.642	11.9	11.9
Fruits, processed	0.916	0.890	1.924	1.9	1.9
Vegetables, fresh	4.023	4.143	7.181	7.2	7.2
Vegetables, processed	1.787	1.924	3.601	3.7	3.7
Vegetable oils	2.322	3.402	4.701	4.9	5.0
Cocoa and products	0.682	0.803	1.299	1.4	1.4
Coffee and products	0.780	0.840	1.638	1.6	1.7

Totals may not add due to rounding.

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

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

Regional Imports

Projected U.S. imports from the Western Hemisphere are reduced \$200 million this month from the February forecast. Mexico is expected to remain the United States' largest supplier of agricultural imports, followed by Canada. The forecast for agricultural imports from Mexico is unchanged at \$22.5 billion, as imports of sugar and tropical products are expected to remain stable, while decreases in fresh vegetable imports are offset by increases in fresh fruit imports. The forecast total of U.S. agricultural imports from Canada decreased by \$100 million to \$21.7 billion, as downward adjustments to U.S. imports of livestock and meats outweigh strong imports of oilseed products.

Imports from South America are forecast down \$100 million from the February forecast to \$13.6 billion. Imports from Chile are forecast \$200 million less than in the previous forecast due to lower expected imports of horticultural products, such as fresh fruits. Colombia's shipments to the United States of sugar and tropical products, particularly coffee products, motivate an upward adjustment of \$100 million in the forecast level of imports.

Imports from Asia are forecast up \$200 million from the previous projection to \$17.8 billion. U.S. imports from China, the largest U.S. supplier in the region, are forecast to increase by \$100 million due to higher expected imports of processed vegetables that more than offset downward adjustments for processed fruit products. The forecast for imports from Indonesia is increased by \$200 million due to higher sales of products such as palm oil, coconut oil, and natural rubber. The forecast for India is raised by \$100 million due to stronger-than-expected U.S. imports of horticultural and tropical products from India.

Forecasted U.S. imports from Oceania are reduced \$400 million this month. Projections from Australia are lowered by \$300 million due to reductions in the projected volume of beef and other meat products. Imports from New Zealand are forecast at \$2.6 billion, a \$100-million decrease from February, due to a small drop in expected sales of beef and dairy products.

Fiscal year 2017 imports from the EU are unchanged from the February forecast at \$21.0 billion, remaining collectively the third-largest agricultural supplier to the United States. This rank reflects the EU's continued strength in supplying horticultural products, such as wine and essential oils, to the United States. The forecasts of U.S. agricultural imports from Africa and the Middle East are also unchanged.

Table 6--U.S. agricultural imports: Value by region, fiscal years 2016-17

Region and country	October - March		Fiscal year	Forecast	
				Fiscal year 2017	
	2016	2017		2016	Feb.
---Billion dollars---					
VALUE					
Western Hemisphere	32.288	33.422	63.161	63.7	63.5
Canada	10.486	10.587	21.461	21.8	21.7
Mexico	11.763	12.357	22.514	22.5	22.5
Central America	2.362	2.520	5.098	5.1	5.1
Costa Rica	0.756	0.734	1.596	1.6	1.6
Guatemala	0.910	1.013	1.877	1.9	1.9
Other Central America	0.696	0.774	1.625	1.6	1.6
Caribbean	0.221	0.274	0.565	0.6	0.6
South America	7.456	7.685	13.524	13.7	13.6
Argentina	0.749	0.703	1.419	1.3	1.3
Brazil	1.709	1.768	3.302	3.3	3.3
Chile	1.799	1.767	3.022	3.2	3.0
Colombia	1.214	1.385	2.291	2.3	2.4
Peru	1.035	1.208	1.742	1.9	1.9
Other South America	0.950	0.855	1.748	1.7	1.7
Europe and Eurasia	10.853	11.183	22.185	22.6	22.6
European Union-28	9.958	10.350	20.407	21.0	21.0
Other Europe	0.810	0.738	1.530	1.5	1.5
Asia	8.371	9.394	17.570	17.6	17.8
East Asia	2.846	3.049	5.791	5.7	5.8
China	2.105	2.237	4.249	4.2	4.3
Other East Asia	0.741	0.812	1.542	1.5	1.5
Southeast Asia	4.331	5.028	9.380	9.5	9.7
Indonesia	1.393	1.707	2.804	2.8	3.0
Malaysia	0.535	0.447	1.070	0.9	0.9
Thailand	1.047	1.138	2.299	2.3	2.3
Vietnam	0.788	1.058	1.996	2.3	2.3
Other Southeast Asia	0.568	0.679	1.210	1.2	1.2
South Asia	1.194	1.318	2.399	2.2	2.3
India	1.048	1.158	2.098	1.9	2.0
Oceania	3.066	2.692	6.087	6.3	5.9
Australia	1.776	1.440	3.386	3.6	3.3
New Zealand	1.231	1.189	2.590	2.7	2.6
Africa	1.475	1.789	2.747	2.9	2.9
Sub-Sahara	1.243	1.594	2.333	2.5	2.5
Ivory Coast	0.607	0.808	1.005	1.1	1.1
Middle East	0.752	0.731	1.446	1.4	1.4
Turkey	0.508	0.476	0.984	0.9	0.9
World total	56.806	59.212	113.109	114.5	114.5

Totals may not add due to rounding.

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

Reliability Tables

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

Commodity	Average absolute forecast errors Fiscal 2012-16					Forecast accuracy Fiscal 2012-16					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
Export value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Grains and feeds	15	11	7	4	2	-	-	-	X	X	40
Wheat	20	10	4	4	4	-	-	X	X	X	60
Rice	6	4	8	5	3	-	X	-	-	X	40
Coarse grains	38	33	20	8	2	-	-	-	-	X	20
Corn	37	32	20	8	2	-	-	-	-	X	20
Feeds and fodders	10	13	12	7	2	-	-	-	-	X	20
Oilseeds and products	11	9	8	5	2	-	-	-	-	X	20
Soybeans	10	11	9	7	3	-	-	-	-	X	20
Soybean meal	23	18	15	9	3	-	-	-	-	X	20
Soybean oil	20	18	12	9	4	-	-	-	-	X	20
Livestock, poultry, and dairy	11	9	4	4	2	-	-	X	X	X	60
Livestock products	7	5	3	3	2	-	X	X	X	X	80
Beef and veal	12	10	6	5	2	-	-	-	X	X	40
Pork	8	6	4	4	2	-	-	X	X	X	60
Beef and pork variety meats	5	5	8	8	4	-	-	-	-	X	20
Hides, skins, and furs	16	15	5	3	2	-	-	X	X	X	60
Poultry and products	10	10	5	4	2	-	-	-	X	X	40
Broiler meat	12	11	5	4	2	-	-	-	X	X	40
Dairy products	24	21	14	9	3	-	-	-	-	X	20
Tobacco, unmanufactured	8	6	6	10	5	-	-	-	-	X	20
Cotton	6	10	8	6	2	-	-	-	-	X	20
Planting seeds	9	8	9	8	4	-	-	-	-	X	20
Horticultural products	5	5	4	2	1	-	-	X	X	X	60
Fruits and vegetables, fresh	6	6	4	3	2	-	-	X	X	X	60
Fruits and veget., processed	5	5	4	3	2	-	-	X	X	X	60
Tree nuts	10	10	6	2	1	-	-	-	X	X	40
Sugar and tropical products	9	8	6	3	2	-	-	-	X	X	40
Major bulk products	10	10	7	4	2	-	-	-	X	X	40
Total agricultural exports	5	4	3	2	1	X	X	X	X	X	100
Average error & accuracy	13	11	8	5	2	3%	10%	31%	55%	100%	40
Export volume											
Wheat	12	6	7	6	3	-	-	-	-	X	20
Rice	7	7	9	5	4	-	-	-	-	X	20
Coarse grains	37	32	24	16	9	-	-	-	-	-	0
Corn	30	24	17	8	3	-	-	-	-	X	20
Feeds and fodders	11	16	14	11	7	-	-	-	-	-	0
Soybeans	11	9	8	6	2	-	-	-	-	X	20
Soybean meal	15	11	9	6	2	-	-	-	-	X	20
Soybean oil	21	21	9	9	5	-	-	-	-	-	0
Beef and veal	8	7	4	4	3	-	-	X	X	X	60
Pork	5	6	2	1	2	-	-	X	X	X	60
Beef and pork variety meats	9	8	11	10	4	-	-	-	-	X	20
Broiler meat	7	6	2	2	1	-	-	X	X	X	60
Tobacco, unmanufactured	23	23	20	13	23	-	-	-	-	-	0
Cotton	5	8	7	6	3	X	-	-	-	X	40
Major bulk products	10	9	6	4	2	-	-	-	X	X	40
Average error & accuracy	14	13	10	7	5	7%	0%	20%	27%	73%	25

- = Error exceeds 5 percent.

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

Country/region	Average absolute forecast errors Fiscal 2012-16					Forecast accuracy Fiscal 2012-16					Forecast accuracy Percent
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
Export value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					
Asia	6	5	5	3	2	-	-	X	X	X	60
East Asia	8	7	6	3	3	-	-	-	X	X	40
Japan	9	7	4	3	1	-	-	X	X	X	60
China	14	13	10	8	6	-	-	-	-	-	0
Hong Kong	11	10	6	6	8	-	-	-	-	-	0
Taiwan	8	8	8	6	7	-	-	-	-	-	0
South Korea	15	15	14	11	5	-	-	-	-	X	20
Southeast Asia	8	6	6	5	4	-	-	-	X	X	40
Indonesia	17	13	13	8	4	-	-	-	-	X	20
Philippines	10	10	9	7	3	-	-	-	-	X	20
Malaysia	10	10	5	7	9	-	-	-	-	-	0
Thailand	18	18	15	5	6	-	-	-	X	-	20
Vietnam	5	5	6	13	15	-	-	-	-	-	0
South Asia	23	23	23	18	12	-	-	-	-	-	0
India	8	8	8	10	9	-	-	-	-	-	0
Western Hemisphere	4	3	2	2	1	X	X	X	X	X	100
North America	4	4	3	2	1	X	X	X	X	X	100
Canada	3	3	2	1	1	X	X	X	X	X	100
Mexico	6	5	4	2	1	-	-	X	X	X	60
Caribbean	4	4	4	5	3	X	X	X	X	X	100
Dominican Republic	13	13	9	9	7	-	-	-	-	-	0
Central America	13	13	13	6	5	-	-	-	-	X	20
South America	17	15	14	9	4	-	-	-	-	X	20
Brazil	32	40	36	29	10	-	-	-	-	-	0
Colombia	33	33	19	10	3	-	-	-	-	X	20
Peru	26	24	24	18	18	-	-	-	-	-	0
Venezuela	22	22	23	18	7	-	-	-	-	-	0
Europe and Eurasia	10	9	6	4	3	-	-	-	X	X	40
European Union-27	13	12	9	5	3	-	-	-	X	X	40
Other Europe	18	18	18	20	10	-	-	-	-	-	0
FSU-12	14	14	14	11	8	-	-	-	-	-	0
Russia	13	13	13	13	4	-	-	-	-	X	20
Middle East	14	10	8	5	4	-	-	-	-	X	20
Turkey	23	16	13	12	11	-	-	-	-	-	0
Saudi Arabia	10	13	13	6	7	-	-	-	-	-	0
Africa	27	20	13	12	6	-	-	-	-	-	0
North Africa	36	29	18	18	10	-	-	-	-	-	0
Egypt	37	24	12	11	8	-	-	-	-	-	0
Sub-Saharan Africa	18	16	12	8	5	-	-	-	-	X	20
Nigeria	26	10	8	8	7	-	-	-	-	-	0
Oceania	26	13	13	11	6	-	-	-	-	-	0
Average error and accuracy	15	13	11	9	6	10%	10%	17%	29%	49%	23

- = Error exceeds 5 percent.

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

Commodity	Average absolute forecast errors Fiscal 2012-16					Forecast accuracy Fiscal 2012-16					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
Import value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Livestock, poultry, and dairy	8	8	5	4	2	-	-	-	X	X	40
Livestock and meats	10	9	6	5	2	-	-	-	X	X	40
Cattle and calves	26	19	5	6	3	-	-	-	-	X	20
Swine	14	16	14	9	9	-	-	-	-	-	0
Beef and veal	15	16	12	8	4	-	-	-	-	X	20
Pork	11	6	9	9	2	-	-	-	-	X	20
Dairy products	5	6	1	3	2	X	-	X	X	X	80
Cheese	6	5	7	8	6	-	X	-	-	-	20
Grains and feed	2	5	4	2	1	X	-	X	X	X	80
Grain products	2	2	2	2	2	X	X	X	X	X	100
Oilseeds and products	10	10	8	5	2	-	-	-	X	X	40
Vegetable oils	9	7	2	2	4	-	-	X	X	X	60
Horticulture products	3	2	3	3	1	X	X	X	X	X	100
Fruits, fresh	3	2	1	5	1	X	X	X	X	X	100
Fruits, preserved	10	11	9	6	2	-	-	-	-	X	20
Fruit juices	21	17	11	8	5	-	-	-	-	-	0
Nuts and preparations	18	14	10	7	6	-	-	-	-	-	0
Vegetables, fresh	6	7	9	4	2	-	-	-	X	X	40
Vegetables, processed	10	8	8	7	5	-	-	-	-	-	0
Wine	4	4	5	2	0	X	X	-	X	X	80
Malt beer	5	6	3	3	2	-	-	X	X	X	60
Essential oils	7	4	4	4	4	-	X	X	X	X	80
Cut flowers and nursery stock	4	4	3	2	2	X	X	X	X	X	100
Sugar and tropical products	19	16	14	6	3	-	-	-	-	X	20
Sweeteners and products	14	10	8	6	3	-	-	-	-	X	20
Confections	10	7	5	3	4	-	-	-	X	X	40
Cocoa and products	11	11	11	7	4	-	-	-	-	X	20
Coffee beans and products	20	15	15	11	4	-	-	-	-	X	20
Natural rubber	60	55	44	17	8	-	-	-	-	-	0
Other imports	20	23	20	9	5	-	-	-	-	X	20
Total agricultural imports	6	5	4	3	1	-	-	X	X	X	60
Average error and accuracy	12	11	8	6	3	23%	23%	32%	52%	81%	42
Import volume											
Wine (HL)	11	10	6	4	2	-	-	-	X	X	40
Malt beer (HL)	4	4	2	2	2	X	X	X	X	X	100
Fruit juices (HL)	14	15	9	3	2	-	-	-	X	X	40
Cattle and calves	11	12	6	9	2	-	-	-	-	X	20
Swine	9	6	5	4	1	-	-	X	X	X	60
Beef and veal	13	12	11	7	3	-	-	-	-	X	20
Pork	13	13	8	11	5	-	-	-	-	-	0
Fruits--fresh	3	3	2	2	1	X	X	X	X	X	100
Fruits--processed	11	10	8	7	3	-	-	-	-	X	20
Vegetables--fresh	4	3	4	2	2	X	X	X	X	X	100
Vegetables--processed	14	13	11	11	10	-	-	-	-	-	0
Vegetable oils	4	4	4	5	2	X	X	X	X	X	100
Cocoa and products	10	7	5	7	2	-	-	-	-	X	20
Coffee beans and products	7	5	4	2	2	-	-	X	X	X	60
Average error and accuracy	9	8	6	5	3	29%	29%	43%	57%	86%	49

- = Error exceeds 5 percent. HL = hectoliters.

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

Country/region	Average absolute forecast errors Fiscal 2012-16					Forecast accuracy Fiscal 2012-16					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
Import value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Western Hemisphere	5	4	4	4	1	X	X	X	X	X	100
Canada	6	5	4	3	1	-	X	X	X	X	80
Mexico	4	5	3	3	1	X	X	X	X	X	100
Central America	9	8	10	6	2	-	-	-	-	X	20
Costa Rica	9	6	6	5	2	-	-	-	-	X	20
Guatemala	10	9	10	7	3	-	-	-	-	X	20
Other Central America	14	16	16	8	6	-	-	-	-	-	0
Caribbean	20	21	19	12	8	-	-	-	-	-	0
South America	7	6	7	5	3	-	-	-	-	X	20
Argentina	13	12	10	8	5	-	-	-	-	-	0
Brazil	11	9	12	12	6	-	-	-	-	-	0
Chile	6	5	5	4	2	-	-	X	X	X	60
Colombia	13	13	11	5	3	-	-	-	X	X	40
Other South America	54	51	34	36	37	-	-	-	-	-	0
Europe and Eurasia	3	2	1	2	1	X	X	X	X	X	100
European Union-27	3	2	1	2	1	X	X	X	X	X	100
Other Europe	7	5	3	8	5	-	X	X	-	X	60
Asia	15	13	10	4	2	-	-	-	X	X	40
East Asia	7	6	4	4	1	-	-	X	X	X	60
China	9	8	6	4	1	-	-	-	X	X	40
Other East Asia	5	4	3	4	2	X	X	X	X	X	100
Southeast Asia	16	14	10	6	2	-	-	-	-	X	20
Indonesia	18	15	12	7	3	-	-	-	-	X	20
Malaysia	33	32	22	11	4	-	-	-	-	X	20
Thailand	13	13	9	6	2	-	-	-	-	X	20
Other Southeast Asia	95	93	73	57	56	-	-	-	-	-	0
South Asia	45	43	48	18	7	-	-	-	-	-	0
India	49	47	46	18	8	-	-	-	-	-	0
Oceania	19	19	24	13	8	-	-	-	-	-	0
Australia	23	23	29	15	10	-	-	-	-	-	0
New Zealand	14	12	20	12	6	-	-	-	-	-	0
Africa	11	10	11	10	4	-	-	-	-	X	20
Sub-Saharan Africa	14	14	12	9	4	-	-	-	-	X	20
Ivory Coast	21	28	33	17	7	-	-	-	-	-	0
Middle East	7	9	16	7	5	-	-	-	-	-	0
Turkey	11	16	22	10	8	-	-	-	-	-	0
Average error & accuracy	17	17	16	10	6	14%	19%	25%	31%	61%	30

- = Error exceeds 5 percent.

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Related Websites

Outlook for U.S. Agricultural Trade

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

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

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

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

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

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