

AGRICULTURAL OUTLOOK

Economic Research Service
United States Department of Agriculture •

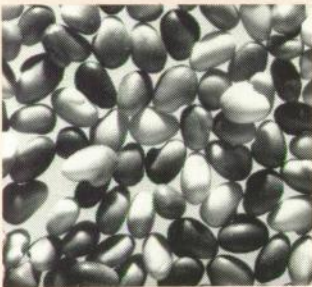
May 1994

FILE COPY



Rules in the Works
for
Enhancing Seafood Safety

AGRICULTURAL OUTLOOK



Nutrition Facts	
Serving Size 1/2 cup (114g)	
Servings Per Container 4	
Amount Per Serving	
Calories 90	Calories from Fat 30
% Daily Value*	
Total Fat 3g	5%
Saturated Fat 0g	0%
Cholesterol 0mg	0%
Sodium 300mg	13%
Total Carbohydrate 13g	4%
Dietary Fiber 3g	12%
Sugars 3g	
Protein 3g	

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1994 Planting Intentions . . . New Seafood Safety Rules . . . Seed Exports . . . & Integrated Pest Management

Planted Acreage Up in 1994

Farmers across the U.S. intend to increase planted acreage of most major field crops in 1994, according to USDA's *Prospective Plantings* report released March 31. Total grain and oilseed area is indicated up about 6 million acres from last year's planted area—to 259.8 million acres. Prospective corn planted area is up 7 percent to 78.6 million acres, in response to a lower ARP and higher prices. Intended soybean area is reported up 3 percent to 61.1 million acres. U.S. cotton and rice producers report increases of 3 and 13 percent in their 1994 acreage—a response to high prices and strong domestic and export demand.

Wheat is the only major field crop expected to show lower planted acreage in 1994—down about 1 percent from last year to 71.5 million acres. Acreage for both winter and spring wheat (excluding durum) is expected to be down slightly.

U.S. producers are also expected to expand acreage of several specialty crops in 1994. Higher prices and larger expected exports to Mexico are behind a 4-percent increase for dry bean acreage in 1994. Expansion of sugarbeet production and steady-to-rising prices have lifted sugarbeet value above sugarcane in recent years, and sugarbeet acreage in 1994 is expected to be the largest since 1976.

Seeds of Trade

For the first time in over two decades, U.S. seed exports are expected to show an annual decline when the 1993/94 marketing year ends in June. Behind this year's drop in seed exports are major changes in agricultural policy and production in the 1990's by two top importers—the European Union (EU) and Saudi Arabia. Changes in EU commodity support prices for soybeans and cuts in Saudi Arabia's wheat subsidies have contracted the markets for these two major U.S. seed exports.



Growth in U.S. exports of planting seed—mostly field crop, vegetable, and grass seed—has been especially rapid during the last decade, with foreign sales of U.S. seed rising from \$323.2 million to \$690.8 million between marketing years 1983 and 1992. For 1994/95, U.S. seed exports will likely resume their steady increase, as seed demand in other parts of the world offsets the impacts of policies in Europe and Saudi Arabia.

Bigger Role for FCS?

With agriculture no longer the dominant industry in rural areas, the Farm Credit System (FCS) is seeking to expand its lending authority. FCS authority currently includes lending to primary agricultural producers and cooperatives, farm-related businesses, buyers of moderate-priced homes in rural communities, export customers, and certain rural utilities. FCS would like to broaden its authority in serving these markets, and to expand into financing rural nonfarm enterprises.

New Rules for Seafood Safety

A nationally mandated seafood safety system recently announced by the Food

and Drug Administration (FDA) is designed to strengthen safety standards as well as to enhance consumer confidence in seafood products. U.S. seafood consumption has fallen in recent years, due partly to declining relative prices for poultry and red meat, but also because of safety concerns.

To address safety concerns, the FDA is proposing to use a Hazard Analysis Critical Control Point system (HACCP) to bolster its seafood safety program. HACCP—a system of safety controls that focuses on prevention of product contamination at strategic points in the production and marketing process—would be added to FDA's current inspection regimen. The FDA published its seafood safety proposal in the *Federal Register* on January 28; the public comment period will run through May 31.

The General Agreement on Tariffs and Trade supports the HACCP system, as many countries move toward HACCP-based standards for domestic and imported seafood. For the U.S.—the world's largest seafood exporter—implementation of HACCP would help keep domestic products competitive on the world market.

Smarter Pest Control

Over half the nation's fruit, vegetable, and major field crop producers are applying some level of integrated pest management (IPM), according to USDA's first comprehensive national study of pest control methods. The new study, based on several ongoing surveys that began in 1991, measures the extent of IPM adoption for over 50 U.S. crops. The IPM approach includes biological and other nonchemical pest control strategies as well as a more efficient use of pesticides through pest monitoring. The new USDA study indicates that pest monitoring for all crops, and crop rotation for corn, are among the most widely practiced IPM strategies, and the use of beneficial insects is among the least widely practiced.

Agricultural Economy



Field Crops Overview

Domestic Outlook—1994 Planting Intentions

U.S. farmers intend to plant 7 percent more corn, 3 percent more soybeans, and 3 percent more cotton in 1994 than last year, according to USDA's March 1994 Prospective Plantings report. Total food grain, feed grain, and oilseed prospective area is expected to rise 6 million acres, to 259.8 million.

Released March 31, the Prospective Plantings report is USDA's first survey-based indication of farmers' acreage intentions for 1994 spring-planted crops, and revises earlier estimates of 1994 winter wheat plantings. The report reflects producers' intentions as of the first 2 weeks in March, and is based on a survey of 70,000 operators. USDA is releasing the first official production and consumption projections for U.S. and global 1994/95 crops on May 10.

U.S. corn area is expected up 7 percent in 1994, but still below earlier expectations. Higher prices this year, and a 0-percent ARP compared with 10 percent in 1993, are behind the expanded area. In the Corn Belt, corn plantings are expected up more than 9 percent, with smaller increases in the Southern Plains and Southeast. Futures prices for new-crop soybeans and corn in February and early March were critical in influencing the planting intentions reported by many producers. While total prospective corn planted area is up substantially from last year—to 78.6 million acres—only in Nebraska is acreage expected to reach a record.

Corn planting in the U.S. generally precedes soybean planting, making soybeans a fallback crop for would-be corn producers who find fields too wet to

plant early in the season. Field conditions during April—when nearly 40 percent of the corn crop is usually planted—were favorable for corn planting.

Soybean planted area is expected to rise 3 percent in 1994, in response to the current season's higher prices. After four consecutive years of season-average prices in the range of \$5.56-\$5.74 per bushel, the 1993/94 season-average price is expected to rise to \$6.40-\$6.50.

Stagnant prices had locked soybean planted area in the range of 59.1 to 59.4 million acres for the 1991-93 crops. Higher soybean prices this year are likely to push 1994 plantings to 61.1 million acres. Prior to the release of the *Prospective Plantings* report, most analysts expected 1994 soybean acreage to be around 60 million acres, based on

Midwest Corn and Soybean Acreage To Rebound

	Corn planted area			Change	
	1992	1993	1994	1992-93	1993-94
	----- Million acres -----			-- Percent --	
Iowa	13.20	12.00	13.10	-9	9
Illinois	11.20	10.50	11.50	-6	10
Nebraska	8.30	8.00	8.40	-4	5
Minnesota	7.20	6.30	6.80	-13	8
South Dakota	3.80	3.35	3.70	-12	10
Wisconsin	3.90	3.40	3.60	-13	6
Missouri	2.50	2.20	2.50	-12	14
Kansas	1.85	2.00	2.15	8	8
North Dakota	1.00	0.78	0.90	-22	15
All states	79.34	73.32	78.63	-8	7

	Soybean planted area			Change	
	1992	1993	1994	1992-93	1993-94
	----- Million acres -----			-- Percent --	
Illinois	9.50	9.10	9.40	-4	3
Iowa	8.15	8.50	8.90	4	5
Minnesota	5.50	5.40	5.60	-2	4
Missouri	4.30	4.20	4.20	-2	0
Nebraska	2.50	2.60	2.70	4	4
South Dakota	2.30	1.80	2.25	-22	25
Kansas	1.90	1.95	2.00	3	3
Wisconsin	0.75	0.61	0.72	-19	18
North Dakota	0.70	0.60	0.68	-14	13
All states	59.13	59.36	61.12	4	3

Source: 1994 Prospective Plantings, USDA.

relatively high corn prices and a large expected increase in corn acreage.

In the Corn Belt, soybean area is expected to total 31.7 million acres, the largest since 1982. Plantings in the Lake States are expected to be a record 7.8 million acres. Record plantings are projected for Indiana, Iowa, Michigan, Minnesota, Nebraska, Ohio, and Pennsylvania. However, soybean acreage in the South is expected to be 12.3 million acres in 1994, down from 12.4 million last year.

The regional distribution of acreage has significant implications for national average yields. Record yields have been set in recent years as soybean acreage has re-concentrated in the higher yielding areas, principally the Corn Belt, and away from the lower yielding South. Indications are that this trend will continue in 1994 as area planted in the South slips below 11 percent of total soybean planted area, down from a previous 5-year average of 15 percent.

Soybean plantings in the U.S. usually begin about the first of May and are typically half complete by the end of the month.

Total U.S. wheat acreage is expected down slightly in 1994, and area for the two larger categories of wheat (winter and spring, excluding durum) is expected to fall. Higher prices for competing crops, and slightly lower average wheat prices, are playing a role in lowering total wheat acreage 1 percent, to 71.5 million acres. A 0-percent ARP is in effect for 1994, unchanged from a year ago.

Winter wheat area for 1994—which was seeded last fall and will be harvested this spring—is expected to total 50.8 million acres, nearly 2 percent below a year earlier. Significant declines are expected in Illinois and Missouri due to unfavorable weather last fall. In Montana, a sharp drop in winter wheat acreage is more than offset by increases in plantings of other classes of wheat. Winter wheat acreage in Kansas and Oklahoma is up 1 percent.

U.S. Field Crops—Market Outlook at a Glance

	Area		Yield	Output	Total supply	Domestic use	Exports	Ending stocks	Farm price
	Planted	Harvested							
	— Mil. acres —	Bu/acre							
Wheat									
1992/93	72.3	62.4	39.4	2,459	3,001	1,118	1,354	529	3.24
1993/94	72.2	62.6	38.3	2,402	3,026	1,237	1,225	564	3.15-3.25
Corn									
1992/93	79.3	72.2	131.4	9,482	10,589	6,813	1,663	2,113	2.07
1993/94	73.3	63.0	100.7	6,344	8,477	6,400	1,250	827	2.50-2.60
Sorghum									
1992/93	13.3	12.2	72.8	884	937	478	277	175	1.89
1993/94	10.5	9.5	59.9	568	743	475	175	85	2.35-2.45
Barley									
1992/93	7.8	7.3	62.5	458	598	366	80	151	2.04
1993/94	7.8	6.8	58.9	400	606	420	65	121	1.95-2.00
Oats									
1992/93	8.0	4.5	65.6	295	477	358	6	113	1.32
1993/94	7.9	3.8	54.4	206	419	305	4	110	1.35-1.40
Soybeans									
1992/93	59.1	58.2	37.6	2,188	2,468	1,406	770	292	5.56
1993/94	59.4	56.4	32.0	1,809	2,106	1,356	590	160	6.40-6.50
			Lb/acre		— — — Mil. cwt (rough equiv.)				\$/cwt
Rice									
1992/93	3.18	3.13	5,736	179.7	213.2	96.7	77.0	39.4	5.89
1993/94	2.92	2.83	5,510	156.1	202.6	98.6	81.0	23.0	8.25-8.75
			Lb/acre		— — — — — Mil. bales				¢/lb
Cotton									
1992/93	13.2	11.1	699	16.2	19.9	10.3	5.2	4.7	54.90
1993/94	13.4	12.8	607	16.2	20.8	10.2	6.7	4.0	58.50*

Based on April 12, 1994 World Agricultural Supply and Demand Estimates; U.S. marketing years for exports.

*Weighted-average price for August 1-April 1; not a season average.

See table 17 for complete definition of terms.

Producers of *spring wheat* (other than durum) indicate plantings of 18.1 million acres in 1994, 1 percent below a year ago. Declines in spring wheat in Minnesota, North Dakota, and South Dakota were offset by larger plantings in Montana, leaving total expected area in the Northern Plains unchanged.

Durum wheat acreage is expected to be 2.6 million acres in 1994, up 18 percent from last year. Tight supplies, low stocks, and relatively high prices for durum compared with other classes of wheat this year are behind the higher durum acreage. North Dakota, which accounts for over 80 percent of durum acreage, is expected to plant 11 percent more

area to durum this year. Durum ending stocks in 1993/94 are expected to total 17 million bushels, the lowest in two decades.

Cotton acreage is expected up 3 percent overall this year, and two mid-size producers—Georgia and North Carolina—are showing their highest levels in the last four decades. High cotton prices and strong domestic and export demand are expected to offset the effects of this year's higher ARP and push up cotton area to 13.8 million acres in 1994. Total cotton use this season (mill use plus exports) is expected to reach 16.9 million bales—the highest since 1926. Faster U.S. and world economic growth, lower

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foreign output, and greater world trade account for the stronger demand for U.S. cotton.

The majority of cotton producing states are expected to show area expansion in 1994. Georgia producers are expecting a 1-million-bale crop, and prospective plantings are up 32 percent from 1993 area to 800,000 acres. North Carolina's planted area is projected up 23 percent to 480,000 acres.

Gains of 7 and 3 percent are expected for cotton acreage in Texas and California, two top cotton producers. Texas is expected to plant 5.7 million acres of cotton in 1994, while California plants 1.2 million.

Cotton area in the Delta is projected 4 percent lower in 1994. Insects, high insect control costs, and dismal yields last year may have dampened Delta growers' enthusiasm for cotton in 1994. Severe late winter ice storms may have provided some relief from insect pressure in 1994 by reducing populations of wintering insects.

Cotton planting in the U.S. generally commences in early April in south Texas and the desert Southwest. Planting progress for the 1994 crop is ahead of last year in south Texas, but trails the 5-year average in California. Smaller winter snow packs, which supply water to California's growers, are causing concern in that state. In the Texas Plains, where planting is yet to start, dry conditions may hinder progress.

Rice area is expected to rise in all six major producing states. U.S. rice producers intend to plant 3.3 million acres in 1994, up 13 percent from 1993, in response to this year's higher prices, increased exports, and a lower ARP. Plantings in Arkansas, California, Louisiana, Mississippi, Missouri, and Texas are expected up between 9 and 24 percent.

Lower production in 1993 and increased domestic and export demand have driven rice prices sharply higher this season. Prices are expected to average between \$8.25 and \$8.75 per cwt in 1994/95, compared with last season's average of \$5.89. Exports are expected to total 81 million cwt this season, up from 77 million last year.

Rice planting—which begins along the lower Texas Gulf Coast and moves north—is underway at a brisk pace. As of April 17, total U.S. rice plantings were 24 percent complete, compared with the 5-year average of 22 percent.

In Texas and Louisiana, plantings were 57 and 51 percent complete, well ahead of both last year and the 5-year averages. Plantings in Mississippi were 40 percent complete, well ahead of last year's 14 percent and a 5-year average of 17 percent. In Arkansas, the largest rice producing state, plantings were 9 percent complete, ahead of last year but below the 5-year average.

[Scott Sanford (202) 219-0840]

Upcoming Reports from USDA's Economic Research Service

The following reports or summaries will be issued at 3 p.m. Eastern time on the release dates shown.

May

- 11 Cattle and Sheep Outlook
Poultry Outlook
- 12 Oil Crops Update
- 18 Agricultural Outlook*
- 19 Former USSR*
- 20 Livestock, Dairy and Poultry
Wheat*
- 23 U.S. Agricultural Trade Update
- 24 Feed*
- 26 Cotton and Wool*
- 27 Agricultural Exports*

*Release of summary

Global Market— 1993/94 Trade Outlook

Japan recently announced intentions to purchase more rice than earlier anticipated. Prospective 1994 imports by Japan have reached 2.4 million tons, up from 107,000 tons in 1993, and negligible amounts in previous years. Import demand in Brazil, another large importer, is also expected higher than earlier anticipated, and total world rice imports are now forecast almost 7 percent above the high level of calendar 1993.

The U.S. export forecast for 1994 is 2.6 million tons, about equal to 1993's large volume. Greater export competition than earlier projected is expected from China, Vietnam, and Burma in 1994, and exports are also projected up from Australia, Argentina, Egypt, India, Pakistan, and Taiwan.

China purchased over 250,000 bales of U.S. cotton in late March. While this was China's first large cotton purchase from the U.S. since the season started last August, further export opportunities are unclear. However, U.S. export opportunities have increased as a result of a drop in foreign production and less export competition. Foreign production is now forecast at 60.6 million bales, 9 percent below last season. And U.S. exports are forecast at 6.7 million bales, up from 5.2 million last year.

U.S. corn and soybean exports are both expected to drop 23 percent in 1993/94. Expectations of U.S. corn exports have been lowered recently, primarily because anticipated world demand is slipping, while U.S. soybean exports are expected lower due to increasing competition from other countries. World corn trade is now forecast 8.5 percent below 1992/93—the lowest since 1985/86—and the forecast for U.S. exports has been reduced to 32 million tons. Imports from all sources are projected lower in southern Africa, Canada, South Korea, Russia, Poland, Egypt, and Taiwan. And competitor exports are expected very high.

U.S. soybean exports continue to lag behind seasonally adjusted expectations. Faced with continued brisk competition

Output, Stocks Down for Oilseeds and Most Grains

	Year ¹	Production	Exports ²	Consumption ³	Carryover
Million tons					
Wheat	1992/93	561.4	110.4	544.3	146.5
	1993/94	560.3	99.0	562.6	144.1
Corn	1992/93	531.0	61.4	507.8	101.9
	1993/94	464.9	56.2	500.6	66.2
Barley	1992/93	165.2	14.9	161.6	35.9
	1993/94	167.7	16.8	168.4	35.2
Rice	1992/93	352.0	14.8	355.6	51.3
	1993/94	348.0	15.8	355.3	44.0
Oilseeds	1992/93	227.0	37.7	184.3	23.3
	1993/94	223.5	36.8	185.5	19.5
Soybeans	1992/93	116.7	29.5	96.2	20.5
	1993/94	113.4	28.3	98.4	16.7
Soybean meal	1992/93	76.2	27.6	75.2	3.7
	1993/94	78.0	29.1	77.1	3.5
Soybean oil	1992/93	17.2	4.3	17.3	1.9
	1993/94	17.7	4.3	18.1	1.5
Million bales					
Cotton	1992/93	82.8	24.8	85.6	38.5
	1993/94	76.7	26.1	84.8	30.5

¹ Marketing years are: wheat, July-June; coarse grains, October-September; oilseeds, soybeans, meal, and oil, local marketing years except Brazil and Argentina adjusted to October-September trade; cotton, August-July. ² Rice trade is for the second calendar year. All trade now has been inflated to include trade among the countries of the former Soviet Union. In addition, rice trade, like other grain trade, excludes intra-EC trade. Oilseed and cotton trade, however, still include intra-EC trade. ³ Crush only for soybeans and oilseeds.

from the record-high South American crop, U.S. soybean exports are expected to fall to 16.1 million tons in 1993/94. Also, forecast 1993/94 world soybean trade is more than 1 million tons below last season.

World import demand for wheat, particularly from the former Soviet Union, continues to weaken. Global 1993/94 wheat trade is forecast 10 percent below the previous season. U.S. exports are still forecast down 11 percent, and competitors' exports are expected to drop 10 percent. Ending stocks are forecast to slip only slightly, and competitors' continued large stocks signal keen export competition in 1994/95.

Area for the Northern Hemisphere 1994/95 winter wheat crop (planted last fall) is down, and weather conditions

through April have been mixed in the Northern Hemisphere. Northern Africa became progressively drier over the winter, reducing crop prospects, and dryness persists in southwestern Ukraine and Spain. However, moisture has been adequate in most of Europe, Russia, and the rest of Ukraine. And timely recent rains have benefited China's winter wheat. [Carol Whitton (202) 219-0824]

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Specialty Crops Overview

USDA's Prospective Plantings report, released March 31, includes farmers' intended annual plantings of dry beans, sugarbeets, sweetpotatoes, and tobacco for 1994. Estimates of fresh and processed vegetable acreage are provided in two USDA vegetable reports published in April. Production and sales estimates for cut flowers, cut greens, potted flowers and foliage plants, and bedding plants are reported in April in USDA's annual floriculture report.

Dry bean plantings are expected up 4 percent from last year, and in North Dakota—a leading producer—are up 12 percent. Substantially higher spring prices for pinto beans, which account for over 40 percent of dry bean output, have helped spur the larger acreage. An expected increase in U.S. dry bean exports to Mexico in 1994 is also playing a role.

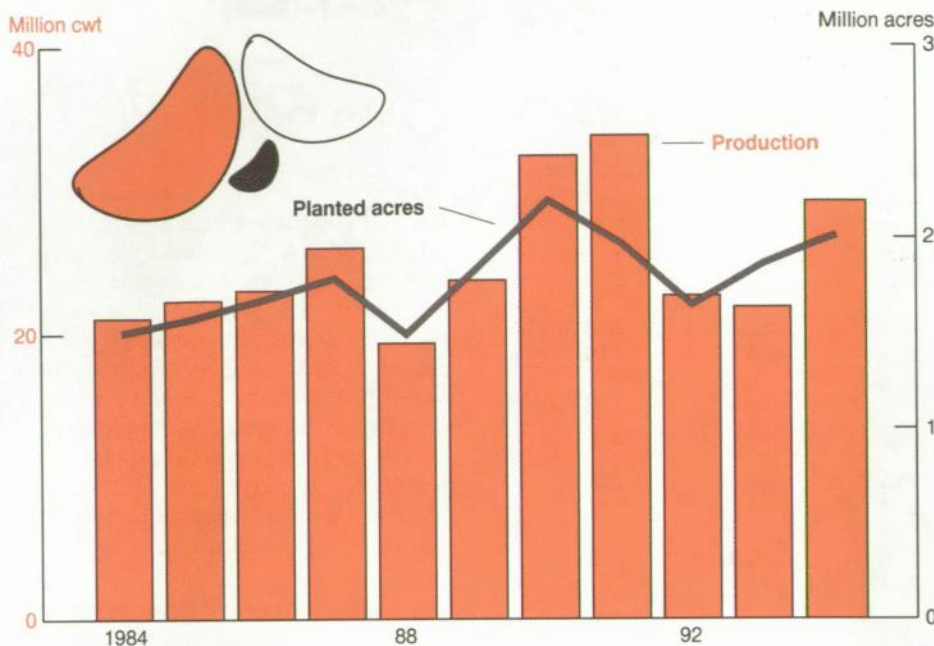
For 1994, the North American Free Trade Agreement (NAFTA) permits the U.S. to export 50,000 metric tons of dry beans to Mexico duty-free. Mexico can impose a 139-percent duty, however, on imports above the 50,000-ton quota. Under the terms of NAFTA, the quota will increase and the duty will be phased out over a 15-year transition period.

Actual dry bean acreage planted this spring will likely go even higher than reported in the March survey. Growers have generally planted about 75,000 acres more, on average, than they indicated in this annual survey.

The biggest increases in dry bean acreage are expected for pintos and Great Northern beans grown in North Dakota and Nebraska, where output was lowered last year by excessive summer rains and early fall frost. Producers in Michigan, where Navy beans dominate, indicated plans to increase acreage only 3 percent. Navy

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Acreage Increase To Boost Dry Bean Production



Includes pinto, Navy, Great Northern, kidney, blackeye, and lima beans.
1994 data are midpoints of estimated ranges.

bean output was up slightly in 1993, and prices this spring have lagged behind those and Great Northern beans.

Sugarbeet acreage is the largest since 1976. U.S. growers intend to plant 1.46 million acres of sugarbeets in 1994, up 1 percent from last year. The largest gains are expected in the North Dakota-Minnesota production area, where acreage is expected up 5 percent.

New processing technology, which recovers sugar formerly lost as molasses, has contributed to increased beet sugar production in the past several years. Around 250,000 tons of additional sugar could be recovered from processing beet sugar molasses in 1994/95.

Beet sugar is expected to account for 54 percent of U.S. sugar output in fiscal 1994. Expansion of sugarbeet production and steady-to-rising prices have pushed the total crop value of sugarbeets higher than sugarcane during the 1990's. USDA's first estimate of 1994/95 sugarcane harvested acreage will be published June 30. Acreage will likely be up marginally this season in Florida, Louisiana, and Texas, and continue to contract in Hawaii.

Fresh and processed vegetable acreage is expected up this spring, and a rebound is continuing for processing tomatoes. In 1994, vegetable processors expect to contract 1.5 million acres of the five major crops—snap beans, green peas, sweet corn, cucumbers, and tomatoes—up 12 percent from last year.

The contracted area of processing tomatoes—about 23 percent of reported processing vegetable acreage in 1993—rose 9 percent from last year. This year's processing tomato area is 24 percent above 1992, when acreage fell in response to large stocks and low prices for processed products. For sweet corn, area contracted by processors rose 9 percent from last year in response to tight supplies of frozen sweet corn.

The acreage of fresh vegetables for harvest during the spring is down 4 percent from 1993, with the biggest changes occurring in snap beans, down 33 percent from last year, and lettuce, up 4 percent. Favorable growing conditions for vegetables in Florida, Texas, and California through mid-April signal abundant spring supplies and lower consumer prices.

Sweetpotato plantings this year are expected up 2 percent from 1993, reflecting higher prices received by farmers for their 1993 crop. The top producers—Louisiana and North Carolina—show most of the increased acreage. Although planting intentions are not reported for Irish potatoes, growers are expected to increase 1994 acreage from last year, in response to higher prices for the 1993 crop.

U.S. grower sales of floricultural crops topped \$3 billion in 1993, down slightly from 1992. Grower sales of floricultural crops, wholesale value, declined 2 percent in 1993 from the previous year, as larger sales of bedding plants and cut cultivated greens failed to offset declines in potted flowering plants, cut flowers, and indoor foliage plants. Sales are expected to grow in 1994 due to increasing domestic demand and slightly higher exports. Floriculture accounts for about one-third of total grower cash receipts for all U.S. greenhouse and nursery crops (which also include ornamental nursery products and ground cover).

Growers plan to increase production area of potted flowering plants in 1994 in response to their growing popularity as year-round indoor and patio plants, holiday decorations, and gifts. Bedding plants are also expected up in 1994 to meet the increased demand for use in home gardens and flower beds. Foliage plant sales were down last year as consumers switched to potted flowering plants. Foliage plant production is expected up about 7 percent in 1994 because of increased export demand.

Domestic cut flower production and sales were down in 1993, and may decline further in 1994 as import competition continues downward pressure on flower prices. The production area of carnations, chrysanthemums, roses, and gladioli intended for harvest in 1994 is about 5 percent lower than in 1993.

Orange juice production is forecast to fall 7 percent from last year. A smaller crop of processing oranges in Florida, the primary producer, is expected to reduce U.S. orange juice production in 1993/94. While grower prices have been up from

1992/93 lows, large carry-in stocks and imports have kept retail prices for frozen concentrate orange juice stable. Favorable weather this spring and summer, and increased tree maturity in Florida groves, could result in a large 1994/95 crop in Florida, which would put downward pressure on prices later this year.

[Glenn Zepp (202) 219-0882]

For further information, contact:

Dennis Shields, and Diane Bertelsen, fruit and tree nuts; Gary Lucier, vegetables; Peter Buzzanell, sweeteners; Doyle Johnson, greenhouse/nursery; Verner Grise, tobacco (202) 219-0882. David Harvey, aquaculture; Lewrene Glaser, industrial crops (202) 219-0085. **AO**

Livestock, Dairy & Poultry Overview

Beef production is expected to be the largest since 1986, given rising slaughter weights and higher slaughter rates than a year earlier. Broiler production in 1994 will reach a record, and turkey production growth will be stronger than last year. In contrast, pork production is forecast to be down from last year.

Per capita consumption of most meats—beef, broilers, and turkeys—is expected to rise in 1994. Pork is a major exception. Broiler consumption continues over two decades of record-setting per capita levels, while beef reverses a near decade of steady decline in per capita consumption.

Cattle slaughter weights, while seasonally lower, are rising at a record-setting pace. Commercial cattle slaughter, especially of steers and heifers, remains ahead of a year earlier. Consequently, beef supplies will likely remain well above a year earlier through the spring.

Beef production in 1994 is expected to be up 4 percent from 1993's weather-reduced level, and the largest since 1986. In addition to a sharp production increase, large quantities of boneless beef in cold storage are limiting seasonal price strength this spring.

Cold storage stocks so far this year, on a carcass-weight basis, have been averaging nearly 50 percent above a year earlier and are the largest since the 1970's. Retailers and some speculative buyers likely built up stocks to guard against possible supply disruptions and price gains similar to those that followed the wet inclement weather during the first half of 1993.

Per capita beef use in 1994 is forecast to be 66.9 pounds (retail basis), 3 percent above last year and the first increase since 1985. Per capita beef consumption peaked in 1976 at 94.4 pounds, as a major herd liquidation began. Except during the first half of the 1980's, cattle herd reductions continued until 1989, and per capita beef consumption declined through 1993, as the beef industry underwent major restructuring.

Fed cattle prices are forecast down nearly 3 percent, averaging \$74 per cwt. The forecast average for retail beef prices in 1994 is \$2.87 per pound, 2 percent below last year.

Pork production is expected to be down 2 percent from last year. This should support higher wholesale and retail pork prices. The production forecast is based on the March 1 *Hogs and Pigs* report, which indicated hog producers intend to have 2 percent fewer sows farrow in March-May than a year earlier while June-August intentions are about the same as last year's. Reduced farrowing in March-May is due to prices hovering near the breakeven point since last fall, and to feed price uncertainties.

Barrow and gilt prices in 1994 will likely average \$47 per cwt, about a dollar higher than last year. The farm-retail spread is expected to widen this year after tightening the past 2 years. Retail pork prices in 1994 are expected to average 2 percent above last year. Per capita

pork consumption is estimated near 51 pounds, down nearly 3 percent from last year.

Broiler production is expected up about 5 percent, setting another record in output. However, continued strength in exports and fast-food sales are keeping broiler prices well above a year ago, and prices will likely continue higher through the spring and summer as demand picks up seasonally.

Broiler production during the second quarter is expected up 6 percent from a year ago, and growth will continue throughout the year. Second-quarter slaughter numbers and average weights are likely to be about 4 and 2 percent higher than a year ago. The hatching-egg flock is averaging over 8 percent larger thus far this year than a year ago.

Wholesale prices for whole birds in the second quarter are forecast about 2 percent higher than a year ago. Returns to broiler producers will remain positive the rest of the year, but higher feed costs are expected to keep first-half returns lower than a year ago. The production cost of a live-weight pound is estimated up 2 cents for the second quarter from a year earlier.

Positive returns to turkey producers in the latter part of last year have prompted stronger production growth in 1994. Turkey production is expected up 3 percent from 1993. This compares with less than 1 percent growth last year.

Production began rising in the first quarter of 1994, and is estimated to be about 5-6 percent higher in the second quarter than a year earlier. Output growth later in the year, however, will be limited by higher feed costs experienced during the first half. Poult placements declined in February after remaining above a year earlier for 3 months, and the decline will show up in slower production growth early in the third quarter.

Stocks at the beginning of the second quarter have remained below a year ago. Relatively low stocks and brisk exports have kept turkey prices above last year thus far. Prices during the second quarter are expected to be slightly above a year

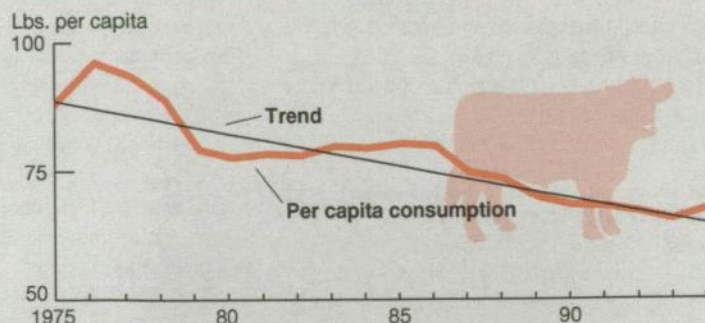
Agricultural Economy

Per Capita Beef Consumption Reverses Its Decline

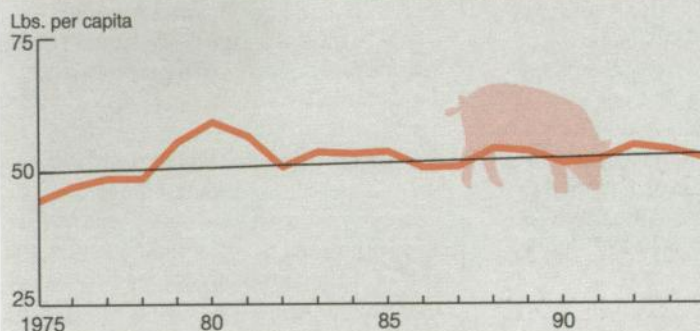
Total consumption, billion lbs.

	1975	1994
Beef	25.7	24.9
Pork	12.0	17.1
Broilers	7.9	21.1

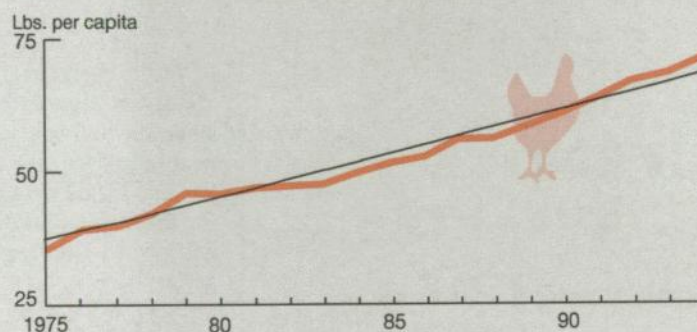
Beef



Pork



Broilers



1994 preliminary.

U.S. Livestock and Poultry Products—Market Outlook at a Glance

		Beginning stocks	Production	Imports	Total supply	Exports	Ending stocks	Consumption		Primary market price
								Total	Per capita	
		— — — — — Million lbs. — — — — —						— — Lbs. — —		\$/cwt
Beef	1993	360	23,049	2,401	25,810	1,275	529	24,006	65.1	76.36
	1994	529	23,932	2,365	26,826	1,425	475	24,926	66.9	71-77
Pork	1993	385	17,088	740	18,213	435	359	17,419	52.3	46.10
	1994	359	16,733	760	17,852	410	375	17,067	50.8	44-50
¢/lb										
Broilers	1993	33	22,017	0	22,050	1,966	27	20,057	68.3	55.2
	1994	27	23,191	0	23,218	2,130	33	21,055	71.0	53-59
Turkeys	1993	272	4,795	0	5,067	212	249	4,606	17.8	62.6
	1994	249	4,940	0	5,189	200	265	4,724	18.1	59-65
— — — — — Million doz. — — — — —										
Eggs*	1993	13.5	5,960.2	4.7	5,978.3	158.9	10.7	5,041.8	234.3	72.5
	1994	10.7	6,035.0	4.5	6,050.2	160.0	12.0	5,078.2	233.6	67-73
¢/doz.										

Based on April 12, 1994 World Agricultural Supply and Demand Estimates. 1993 estimates. 1994 projections.

*Total consumption does not include eggs used for hatching.

See tables 10 and 11 for complete definition of terms.

earlier, while feed costs per liveweight pound are estimated to be 17 percent above last year.

Producer returns in the second quarter are expected to remain below breakeven, compared with breakeven returns a year earlier. For the year, returns are expected to average close to breakeven.

Table-egg production is expected to be up about 0.7 percent, down slightly from 1993's growth rate. Second-quarter table-egg production is expected to be nearly 1 percent above a year earlier due to a larger laying flock. The table-egg flock has been 1-2 percent larger than a year earlier each month for the past year, due to positive returns since August 1992.

First-quarter hen slaughter was higher than last year, helping to maintain positive returns even with lower egg prices. The large layer flock at the beginning of the year and the large numbers of pullets that entered the flock during the first quarter are pressuring prices downward.

Wholesale prices for grade A large eggs are expected to be considerably lower in second-quarter 1994 than last year's 73 cents per dozen. Third-quarter wholesale prices will be slightly lower than a year earlier. Lower egg prices and higher feed costs will push producers' returns to negative in the second quarter. Returns will likely be positive, but slightly below a year ago, in the third quarter as feed prices begin to decline. Returns are expected to be positive for the year. Retail prices during the third quarter are expected to be 85-89 cents per dozen, about 4 percent below a year earlier.

Milk prices for manufacturing use during the first half of 1994 have been stronger than earlier expected. Behind the price gains are weaker milk production and greater than anticipated commercial use of skim solids. Prices for all milk are projected to average 6-8 percent higher than a year earlier during the first half of 1994. Increases in cheese sales and recovery in use of fluid milk and non-fat dry milk have contributed to the recent price increases.

The March Minnesota-Wisconsin (M-W) price of manufacturing-grade milk was \$12.77 per cwt, up 36 cents from February and just above the November seasonal peak. The higher wholesale cheese prices indicate additional April, and possibly May, rises in the M-W price.

Increases in milk production during the second half of 1994 are expected to outstrip gains in commercial use and weaken prices. Milk prices are expected to average slightly below a year earlier during July-December.

However, prices may be as volatile as a year ago, particularly if pipeline stocks are excessive by late spring. Key uncertainties for prices in the second half include the strength of cheese sales and the size and timing of milk production increases. Farm prices for milk in 1994 are expected to average slightly above last year.

For further information, contact:

Agnes Perez, coordinator; Ron Gustafson, cattle; Steve Reed, hogs; Lee Christensen, Larry Witucki, and Milton Madison, poultry; Jim Miller and Sara Short, dairy. All are at (202) 219-1285.

AO

May Releases—USDA's Agricultural Statistics Board

The following reports are issued at 3 p.m. Eastern time on the dates shown.

May

- 2 Crop Progress
Poultry—Production and Value
- 3 Poultry Slaughter
- 4 Broiler Hatchery
- 5 Egg Products
- 6 Dairy Products
Dairy Products—Annual
- 9 Crop Progress*
- 10 Cotton Ginnings—Annual
Crop Production
- 11 Broiler Hatchery
- 12 Potato Stocks
Turkey Hatchery
- 13 Milk Production, Disp.,
and Income
Milk Production
- 16 Crop Progress*
- 17 Farm Labor
- 18 Broiler Hatchery
- 19 Catfish Processing
- 20 Cattle on Feed
Cold Storage
Livestock Slaughter
- 23 Crop Progress*
- 24 Chickens and Eggs
- 25 Broiler Hatchery
- 26 Peanut Stocks and
Processing
- 31 Agricultural Prices
Crop Progress*

*After 4 p.m.

Agricultural Economy

News Watch . . .

USDA's Role in New Antipoverty Plan

In late March, Agriculture Secretary Espy joined Vice President Gore and two other Cabinet secretaries in announcing a new plan to fight poverty. The plan focuses on ways to empower communities to solve problems of jobs, homelessness, and low incomes. USDA's role includes expanding its nutrition programs for women and children. USDA will also participate with other agencies in implementing the rural empowerment and enterprise zones approved last year.

About half of these zones—three empowerment and 30 enterprise zones—are designated for rural areas. Both types will use tax incentives and other economic inducements to encourage businesses to invest or expand in targeted distressed areas. The empowerment zones also include funds for social services, job training, housing, and transportation.

While agriculture-dependent areas are only a small part of the rural economy, they stand to benefit as much as other rural areas from successful enterprise zones (AO April 1993).

Census of Agriculture—A Preview

Initial published statistics from the 1992 Census of Agriculture indicate that farm numbers and farm size are in line with long-term trends. As of April, reports of at least 10 states were available. Each of the first 10 states completed—Delaware, Indiana, Iowa, Maryland, Missouri, Ohio, Oregon, Virginia, Washington, and Wisconsin—had fewer farms in 1992 than in 1987 when the previous census was taken. All 10 states also had less farmland than in 1987, and average farm size increased in all states but Oregon. Previous research indicates that the trend toward fewer, larger farms is likely to continue into the next century but at a slower rate than several decades ago (AO July 1993).

The Bureau of the Census continues to release census volumes. About half the state reports are expected by the summer of 1994. By fall, census volumes on all states, in addition to the U.S. summary volume, will be available. Census results are being published in both printed and CD-ROM format.

Air Pollution May Damage Crops

Continued intensification of ground-level ozone and smog could slowly reduce the amount of food grown in the world over the next three decades, according to a new study from the Georgia Institute of Technology. These pollutants, mostly from auto exhausts and factory smokestacks, may significantly reduce yields of major crops by the year 2025. The study, published in the April issue of *Science*, indicated that about 60 percent of the world's pollutants was produced by North America, Europe, China, and Japan—also the areas where about 60 percent of the world's crops are grown. According to the researcher, wheat and soybeans are the cereal crops most sensitive to air pollut-

ants, but new varieties could be developed which would be less easily damaged by these pollutants.

USDA's Economic Research Service recently used air pollution indexes to identify changes in county air pollution levels between 1980 and 1990 in the U.S. (AO August 1993). While the study found that many areas have seen dramatic improvements in overall air quality during the 1980's, some counties, especially in the Northeast, still experience high levels of certain pollutants which can damage agricultural crops.

Wetlands Signup for Flood-Stressed States

USDA announced a second signup period last month for the Emergency Wetlands Reserve Program (EWRP) in the Midwestern states that were flooded last year. Landowners in these states will have a further opportunity to return cropland to wetlands during this signup period, which began last month and continues through December 30.

Landowners in the Midwest become eligible for the program if the cost of cropland reclamation and/or levee repair exceeds the fair market value of affected cropland. The EWRP will provide at least 75 percent of the cost to restore the land to wetland. The first EWRP signup returned about 25,000 acres to wetlands in the Midwest—Missouri led with 12,300 acres accepted, followed by Iowa with nearly 6,000.

The EWRP meets three objectives (AO September 1993):

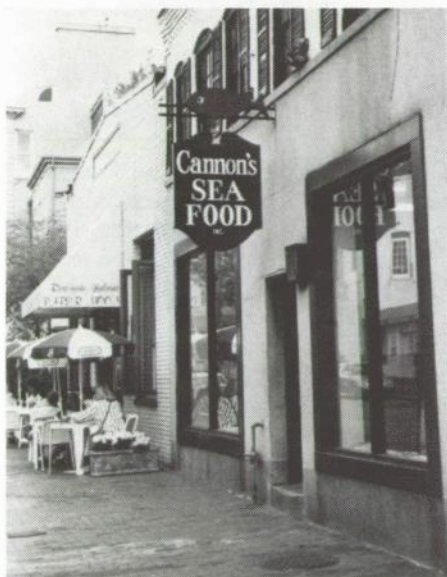
- providing assistance to flood victims while simultaneously increasing restored wetland acreage;
- saving government crop insurance and disaster payments in the future by permanently retiring the most flood-prone farmland along these rivers; and
- avoiding costs for restoring levees and ditches in some areas, as well as reducing wetland restoration costs.

Rapid Test for *Salmonella*

A chemist with USDA's Agricultural Research Service is developing a new test capable of reducing the time for detecting *Salmonella* in poultry from a day to just minutes. The test will use electrical current to determine the number of *Salmonella* cells present in the water used to wash poultry during processing. The design for this *Salmonella* test was adapted from technology developed in Israel and the United Kingdom to test for *Staphylococcus* bacteria.

Salmonella is one of the most frequent bacterial agents of food-borne disease. ERS estimates that salmonellosis caused by all food sources cost the nation \$1.2 billion to \$1.6 billion in medical costs and productivity losses in 1992 (AO July 1993). **AO**

Commodity Spotlight



Stronger Seafood Safety Rules Proposed

A recently announced plan for a nationally mandated seafood safety system is designed to enhance consumer confidence in the safety of seafood products as well as strengthen standards. The Food and Drug Administration (FDA) is making changes in the way seafood—fish, shellfish, and mollusks—is handled and inspected throughout the production and marketing system.

The nutritional qualities of fish—a low-calorie, low-fat source of high-quality protein—helped propel U.S. seafood consumption to a peak of about 16 pounds per person by 1987. But consumption of seafood has fallen off in recent years in the U.S. The decrease is due partly to declining relative prices of poultry and red meat, but is also a response to concerns about seafood safety.

In an effort to address safety concerns, the FDA is proposing to use a Hazard Analysis Critical Control Point system (HACCP) to bolster its seafood safety program. HACCP is a system of safety

controls which shifts the focus from detection of contaminated finished products to prevention of product contamination. Adding HACCP to the FDA's current system of periodic unannounced inspections of processing plants is expected to produce a more effective and efficient system for ensuring the safety of seafood.

The FDA published its seafood safety proposal in the *Federal Register* on January 28, and the public comment period ends on May 31. The FDA will review comments on the proposal before issuing final rules, and has proposed that the rules become effective 1 year after they are published in the *Federal Register*.

The HACCP system has the backing of the seafood industry, and government and industry have already done a considerable amount of work toward applying HACCP to seafood. Also, many other countries are moving toward requiring that both domestic and imported seafood products come from an HACCP-based inspection system. The General Agreement on Tariffs and Trade (GATT) supports the HACCP system.

Focusing on "Critical Control Points"

Once an HACCP system is in place, the FDA would continue to conduct inspections of randomly selected seafood processors. The combined new system would address monitoring needs that are unique to the seafood industry.

Small independent fishermen and small processors still account for much of the harvest and production of seafood. The U.S. fishing fleet alone operates more than 100,000 vessels, according to a recent National Academy of Sciences report. Although the number of aquaculture operations is growing, about 85 percent of domestic seafood production is still harvested from wild resources, and in many cases harvesters may not have advance knowledge of possible safety problems of the catch. For both farm-raised and wild-catch seafood, the wide range of species and product forms adds to the complexity of ensuring safety.

The FDA's proposed safety program is designed to prevent the contamination of seafood at critical control points in the production and marketing system. Under the proposal, all processors are required to develop HACCP plans that relate to the specific nature of their businesses, and processors are responsible for the adherence of their seafood suppliers to the new safety rules.

The first step in the HACCP process involves *identifying the likely hazards* associated with processing a specific product. In the second step, processors *catalog the critical control points* in the harvesting and processing system at which their product could possibly become contaminated. The number and location of these critical control points vary depending on the specific production process.

The third step of the HACCP process is to *establish critical limits for preventive measures* associated with each of these points. For canned products, an example might be the length of time the product has to spend in the retort, or how high to set temperature and pressure.

The fourth step of the process is to *develop a method of monitoring* each critical control point to detect any hazard to the integrity of the product. The fifth step establishes a *corrective action plan* to be activated when a pathogen level is exceeded or proper procedures have not been followed.

In the sixth step, processors are required to *keep records* on the results of the monitoring process. The final step in the HACCP process is to establish procedures to *verify that the new system is working*.

While the new food safety initiative is aimed primarily at seafood processors, the proposed rules apply to almost every sector of the industry, including packers, wholesalers, and importers. Fishermen or aquaculturalists would be affected by the requirements placed on the first-line processors to have knowledge about the product's origin. For retailers, the FDA has developed a "Model Food Code" for states to incorporate in their legislation on methods for maintaining seafood safety in restaurants and stores.

Commodity Spotlight

The Categories of Seafood Hazards

Seafood is processed into a wide range of products and is consumed in many forms—smoked, canned, salted, dried, fresh, frozen, and raw. While thorough cooking destroys most harmful organisms if any are present, raw mollusks (oysters and clams) have been popular in the U.S., and the consumption of raw fish in sushi is gaining popularity in this country.

A recent National Academy of Sciences report indicates that most of the seafood sold in the U.S. is wholesome and unlikely to cause illness. According to the Centers for Disease Control and Prevention (CDC), about 5 percent of reported food-borne illness between 1973 and 1987 was linked to seafood.

Generally the same kinds of contamination can affect both farm-raised and wild-catch seafood. According to the FDA, the six most common seafood hazards are the following.

- A number of different *bacteria* can be found in seafood. Some examples are *C. botulinum* (in canned or controlled-atmosphere products), *listeria*, *salmonella*, and *staphylococcus*.
- Illnesses from *viruses*, such as the Norwalk virus, can be associated with the consumption of raw mollusks or shellfish.
- Some *naturally occurring toxins* can accumulate in fish and mollusks. Some examples include ciguatera, found in some large tropical reef fish; domoic acid, found in shellfish and mollusks; and saxitoxin, also found in shellfish and mollusks.
- A number of fish species are at risk to have *parasites* such as roundworms. This normally becomes a human health problem only when fish are eaten raw or not fully cooked. The FDA Model Food Code requires freezing to destroy these organisms in fish for raw consumption.
- *Chemicals* can be a localized problem in freshwater species, but can also affect ocean fish. Chemical contamination can result from local spills or dumping of pesticides, industrial chemicals, heavy metals, and petroleum by-products.
- For the most part, seafood is more perishable than livestock or poultry. The potential for relatively faster *decomposition* gives seafood a shorter shelf life and makes handling more difficult.

To assist the seafood industry in changing over to an HACCP-based system, the FDA has published a "Fish and Fishery Products Hazards and Controls Guide." This publication provides the information a firm would need to design its HACCP program. Seafood hazards are described by species, with examples of critical control points in the processing system for each species, and techniques

for monitoring them. The safety guide also contains information on testing, record keeping, and corrective actions to take if a problem is identified.

Rules Cover Seafood Imports

The FDA is proposing that foreign processors who export to the U.S., as well as domestic processors, be required to adopt

an HACCP safety system. The U.S. is the second-largest seafood importer in the world, and in 1992 imported over \$5.7 billion worth of edible products.

The FDA currently inspects seafood imported into the U.S., and rejects shipments not meeting U.S. standards. In examining shipments of imported seafood, FDA looks at the documentation, and then determines which shipments might warrant further inspection. Among the factors in this determination are the origin of the product, whether problems have arisen in the past with these types of shipments, and whether the product will undergo further processing in the U.S.

Under this process, shipments at wharfs and airports are selected for examination, and representative samples are taken of the import lots. If the initial examination indicates a potential problem, a more detailed laboratory analysis is made. The FDA also has an automatic detention program that requires products with a history of problems to be subject to laboratory analysis and certification before the shipments can enter the country.

In addition to current FDA inspection procedures, importers will be required to have an HACCP plan of their own and to obtain HACCP plans from their foreign suppliers under the proposal. Importers will also be required to monitor their suppliers for HACCP compliance by inspecting overseas plants themselves, obtaining certification of foreign inspections, or testing the end product. Importers seeking to verify HACCP plans from their suppliers can depend on a memorandum of understanding with the foreign country, if the FDA has established one based on equivalent safety systems in place.

The Benefits of Stronger Rules

The FDA estimates that the cost to seafood processors, importers, repackers, and wholesalers of moving to an HACCP-based inspection program is smaller than the potential benefits of the regulation. Costs would be about \$139 million in the first year and \$79 million each subsequent year for the U.S.

seafood industry, and for foreign firms about \$96 million in the first year and \$44 million per year afterwards.

On the other hand, the safety benefits of the proposed option—a lowering of medical costs and productivity losses due to any seafood contaminants—are estimated at between \$15 million and \$75 million per year. And the FDA estimates that the long-term health benefits from an increase of 1-5 pounds per capita in seafood consumption, due to stronger consumer assurance of a safe product, are between \$3 and \$14 billion over a 10-year period.

An added consumer benefit of the proposal is that it would check economic fraud. Product mislabeling is the most prevalent problem that falls into this category; due to the large number of species, it is difficult for consumers to detect when a lower value species has been substituted for a higher priced one. Other examples of fraud that have been detected include overglazing or overbreading products, and using chemical dips to increase the proportion of water in a product.

The strong safety rules being required by some importers of U.S. seafood products create an additional incentive for the U.S. industry to develop an improved seafood inspection program. Most of the top markets for U.S. exports—Japan, the European Union (EU), and Canada—are moving toward an HACCP-based inspection system. The EU already requires importers to adopt comparable inspection methods—although that requirement has not yet been fully implemented. For the U.S.—the largest seafood exporter in the world—implementation of HACCP would help to keep domestic exports competitive on the world market.

[David Harvey (202) 219-0085] **AO**

Sugarbeet Acreage Up Again In 1994

U.S. sugar production in crop year 1993/94 is forecast to be 7.6 million tons (raw value), second only to last year's record 7.8 million. While roughly equal amounts of sugar were produced from beets and cane a decade ago, beet sugar production has expanded more rapidly in recent years than cane sugar output. Beet sugar now accounts for about 54 percent of total U.S. sugar production, and the share is likely to be even larger by the end of the decade.

Declining sugarcane acreage in Hawaii has accounted for most of the slow growth in cane sugar output in recent years. The decline is due largely to relatively high labor costs, environmental restrictions, high land values, and substantial costs of shipping to the mainland. Two sugarcane processing facilities in Hawaii have announced plans to close operations this year. During the last 5 years, Hawaii has accounted for about 10 percent of sugarcane acreage and around 20 percent of cane sugar production. Both of these shares are expected to continue declining.

In contrast, Florida and Louisiana have set records in recent years for sugarcane acreage and production, limiting the decline in cane sugar's share of sugar production. Further expansion in Florida will be limited due to lack of additional land suitable for growing sugarcane.

Among the 14 states currently growing sugarbeets, Minnesota and North Dakota have experienced the largest expansion in beet sugar production. Sugarbeet planted area in Minnesota increased 50 percent, from about 260,000 acres in the

mid-1980's to an expected 390,000 acres in 1993. In North Dakota, area planted rose from about 140,000 acres in the mid-1980's to 194,000 acres in 1993, a 36-percent increase.

USDA's March 1994 *Prospective Plantings* report indicated Minnesota's 1994 sugarbeet area to be up 5 percent from last year, to 408,000 acres, and North Dakota's up 5 percent to 203,000 acres. These two states together account for 42 percent of total area forecast to be planted to sugarbeets in 1994, up from less than 20 percent two decades ago. Michigan, which accounts for 13 percent of sugarbeet acreage, is forecast to expand plantings 4 percent in 1994. Acreage in Washington, which only accounts for a very small portion of U.S. sugarbeet acreage, is up dramatically.

However, total U.S. sugarbeet acreage is forecast up only 1 percent since most other states are forecast to have fewer acres. For example, planted area in California, which accounted for 10 percent of total sugarbeet acreage in 1993, is forecast to fall by 6,000 acres in 1994 to 135,000, the lowest in decades. Other states forecast to plant fewer acres in 1994 include Colorado, Idaho, Ohio, Texas, and Wyoming.

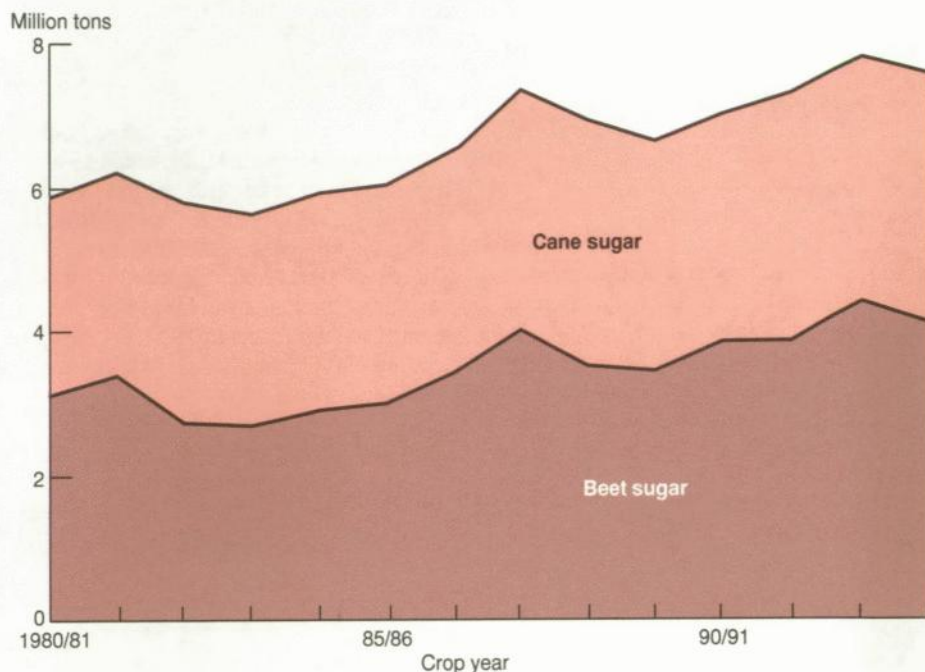
Regional Advantages: Costs, Climate, Co-ops

Sugarbeets are grown in the fertile Red River Valley of Minnesota and North Dakota, and in the Minnesota River Valley in southern Minnesota. Western North Dakota grows a small amount of sugarbeets, which are processed in Montana.

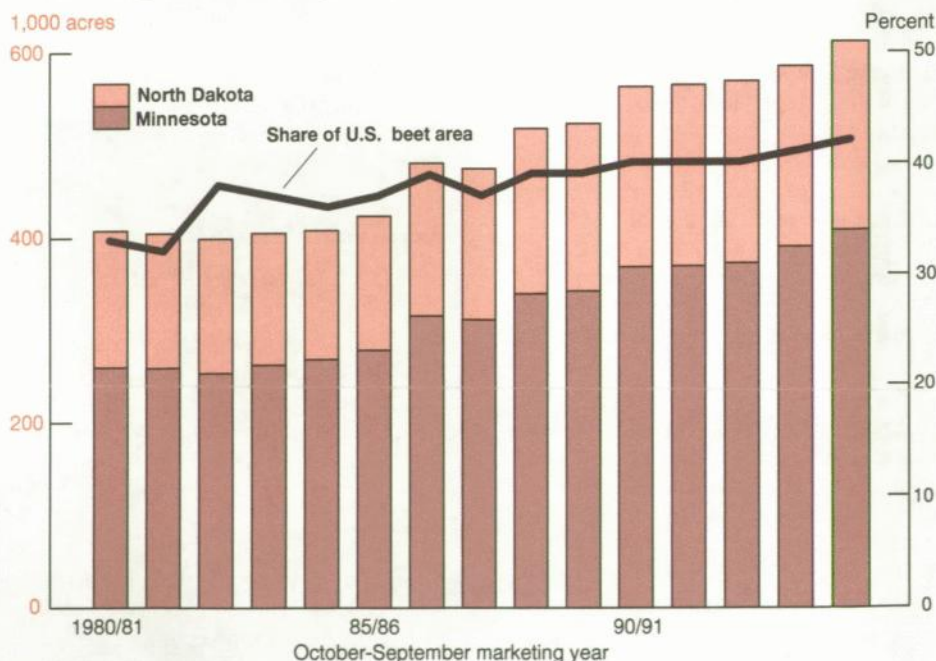
Minnesota and North Dakota have several advantages in sugarbeet production over other parts of the country. Unlike most other states where sugarbeets are grown, these two states grow sugarbeets without irrigation, lowering the per-acre cost of production. The higher yields with irrigation—often 10 tons more per acre than the average of 17 tons on non-irrigated acreage—do not always compensate for greater per-acre production costs.

Commodity Spotlight

Beet Sugar Accounts for More Than Half of U.S. Sugar Production . . .



. . . and Sugarbeet Acreage Continues To Rise in the Upper Midwest



1994/95 preliminary.

A second significant advantage of the upper Midwest is its long, cold winter. Unless frozen, the sugar in sugarbeets deteriorates rapidly after harvest. In some parts of the U.S., beets must be processed by the end of February, and in California beets must be processed within a few days after harvest.

But in the colder regions, sugarbeets can be put into piles to freeze. In the upper Midwest, these piles of sugarbeets remain frozen as late as early April, allowing processors to operate for 7 months or more a year. The longer operating period significantly reduces fixed costs per ton of sugarbeets processed.

Another advantage of the region's sugar-beet industry is that all three processors in the Red River and Minnesota River Valleys are producer-owned cooperatives—the only grower-processor co-ops among the 10 beet sugar processors in the U.S. To produce sugar efficiently, beet farmers must make operating decisions that maximize sugar output by the factory.

While sugarbeet farmers who sell to independent processors under contract have built-in incentives to manage for efficient sugar production, these incentives may not be as strong as incentives for co-op owner/members. Because co-op members own the processing facilities and share directly in the profits from sugar production, they have a direct incentive to manage their farming operations for efficient sugar production.

Two of these co-ops have recently built facilities for recovering sugar from beet molasses, or "desugaring." This process, which was implemented in the late 1980's and early 1990's, allows for recovery of much of the sugar normally lost in molasses. Although the initial capital investment in this process is substantial, it is a very efficient method of producing more sugar from the same amount of beets. One of the cooperatives is considering construction of additional desugaring facilities.

The co-op structure allows for the returns from the sugar recovery process to accrue to the farmer/member. Thus, most of the returns often stay in the local community, which might not be the case for processing companies under other forms of ownership.

On January 1, the three co-ops formed a joint marketing venture to sell sugar and other products domestically and in international markets. The enhanced marketing power of the new venture is likely to boost the competitiveness of all three co-ops.

An indicator of the success of the sugar-beet co-op structure in the Red River and Minnesota River Valleys is the price of a co-op share. Each member is permitted to deliver sugarbeets to the processor from an acreage determined by the

Commodity Spotlight

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number of co-op shares the producer owns. Roughly 1 acre of production is permitted per share, although over time the co-ops may adjust the ratio. Any farmer who wants to expand area must acquire shares from other members, unless the co-op issues new shares or changes the permitted ratio. The price of a co-op share in at least one of the co-ops has risen dramatically, from \$100 when first issued in 1992 to \$800 in the late 1980's, and a share is currently worth about \$2,100.

Beet Production Also Expanding in Washington

When the Utah and Idaho Sugar Company closed in the Moses Lake area of Washington in 1980, it left no other processor operating in the state. All sugarbeet production ceased, except from about 1,500 acres in the Prosser area which was processed in Idaho.

In 1993, farmers in the Moses Lake area formed a cooperative, and began growing—though not processing—sugarbeets. Their 1993 crop was the first sugarbeet production in this area since 1978. This year, the new cooperative plans to grow several thousand acres of sugarbeets, for delivery in both California and Idaho.

All sugarbeets in this area are produced on irrigated land. The 1993 crop indicated a potential for very efficient sugarbeet production, with sugarbeet yields and sucrose content above the national average.

Construction of a beet sugar processing facility in the Moses Lake area is under consideration, but several obstacles exist. First, substantial amounts of capital would have to be raised, as construction of a beet sugar processing facility costs tens of millions of dollars.

Second, while returns to sugar production in this area currently look promising, investors would likely require favorable longrun forecasts of sugar prices. But in new farm legislation in 1995, Congress could alter the sugar program—the government's mechanism to keep sugar prices from falling—and thus possibly affect the long-term price forecast.

Finally, the potential for marketing allotments under the current sugar program creates risk for any new entrant into the beet sugar industry. The amount of a company's allocation, which would limit its ability to sell sugar in the U.S., depends in part on the company's sugar marketings from crop years 1985 through 1989.

A new company, with no marketing history, would risk receiving an allocation well below its current level of production. While no allotments are currently in effect for fiscal 1994, they were triggered in July 1993 for fiscal 1993, and their possible implementation is assessed every quarter.

While moderate to slow growth is forecast for total U.S. sugarbeet production the rest of the decade, strong growth in the Red River and Minnesota River Valleys, and Washington state, is likely to continue and account for most of the total expansion.

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W-L Research, Inc.

Seeds for Export: A Lull In Growth

U.S. seed exports are expected to show an annual decline for the first time in over two decades when the 1993/94 marketing year ends next month. Behind this year's drop in seed exports are major changes in agricultural policy and production in the 1990's by two top importers—the European Union (EU) and Saudi Arabia.

Growth in U.S. exports of planting seed—primarily field crop, vegetable, and grass seeds—has been especially rapid during the last decade, as foreign markets for seeds expanded. Between July-June marketing years 1983/84 through 1992/93, the value of U.S. exports rose from \$323.2 million to \$690.8 million—more than the value of soybean oil exports and approaching dairy product and (sorghum) exports. The U.S. seed trade balance has never been negative, with the surplus standing at \$485 million in marketing year 1992/93.

Despite the overall gains in seed exports, the European market for U.S. soybean seed has fallen dramatically for several years, and wheat seed exports to Saudi

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Arabia have plummeted this marketing year. But the impact of the contracted European soybean seed market should conclude in marketing year 1994/95, while most of the impact of Saudi Arabia's market contraction will be felt this year. For the 1994/95 marketing year, U.S. seed exports will likely resume their steady increase.

Policies Lower Exports Of Field Crop Seeds

Mexico, Canada, Italy, Saudi Arabia, and France are the top markets for U.S. exports of major field crop seeds—corn, soybeans, wheat, and grain sorghum. The value of U.S. field crop seed exports during the 1992/93 marketing year was \$309.5 million, up 2.5 percent despite declining markets for wheat and soybeans. Changes in agricultural policy in some of these key foreign markets have contracted the market for U.S. field crop seeds, and field crop export value is expected to drop in marketing year 1993/94.

EU agricultural policies in the 1980's resulted in rapidly rising soybean seed exports to that market, but policy shifts during the 1990's have caused soybean seed exports to plummet. During the 1980's, the desire to become self-sufficient in food production, as well as to provide comparable returns for all major

domestic commodities, led to heavy support for the EU oilseed sector.

Changes in EU soybean support prices—which ranged from 45 to 170 percent above world prices between 1980 and 1990—resulted in a shift away from cereal acreage to soybean acreage. With support prices well above world soybean prices, and the relative decline in incentives for cereal production, soybean plantings rose dramatically in the EU, particularly in Italy's Po Valley.

A further consequence of the market intervention policies was an increase in inputs needed to grow soybeans in the EU—particularly the high-quality soybean seed produced in the U.S. While the EU has a well-established seed industry for traditional European crops—such as wheat, barley, rye, and rapeseed—soybean production and plant breeding programs have historically been concentrated in the U.S.

Southern Europe and the U.S. Corn Belt have similar growing conditions, and U.S. soybean seed varieties were easily adapted in southern Europe. Also, U.S. trade was facilitated by requirements of the Organization for Economic Cooperation and Development that seed exported to OECD countries be certified as meeting strict standards of quality and variety.

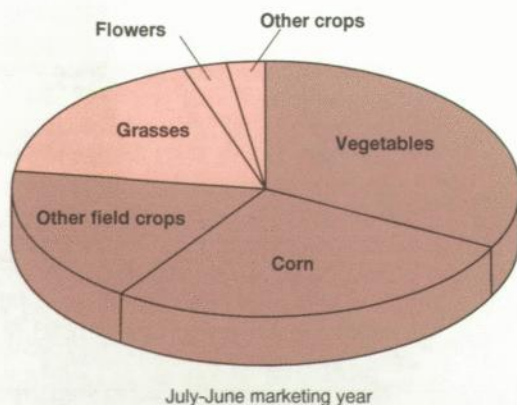
Furthermore, the market interventions introduced by the EU led to incentives to import seed rather than use land to produce the seed. During the 1980's, prices Italian farmers paid for U.S. soybean seed remained near or below the intervention prices except in 1983 and 1985.

But in 1992 the EU's Common Agricultural Policy (CAP) abolished intervention prices and opted for direct payments to producers. As European growers confronted world soybean prices, they responded by reducing soybean plantings.

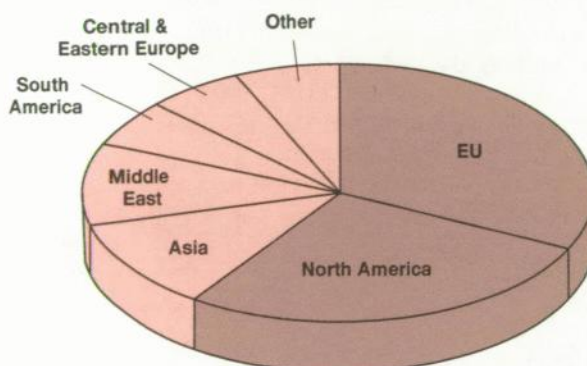
Beginning in marketing year 1990/91, U.S. sales to the EU of soybean seed for planting dropped to 30,000 tons from a high of more than 80,000 as planted area declined from a record 660,000 hectares to 235,000 in 1993. Soybean acreage for 1994/95 is forecast up from last year but remains well below the record in 1990/91.

Current changes in Saudi Arabia's agricultural policy are causing wheat seed exports to that market to plunge. Saudi Arabia's expansionist policy on wheat production during the 1980's generated imports of high-yielding U.S. wheat seed varieties. The government recently cut wheat subsidies and restricted imports of wheat and barley seed in an effort to reduce its swelling national budget. As a result, wheat production has plummeted,

Vegetables and Field Crops Account for Over Three-fourths of U.S. Seed Exports . . .



. . . and North America and the EU Are the Dominant Markets



Total U.S. seed exports, 1992/93
\$690.8 million

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as have U.S. exports of wheat seed to that market.

On a more positive note, new Eastern European and East Asian markets for U.S. seed are on the horizon. Sales of field crop seed to Eastern Europe, especially corn and sunflower seeds, may begin in the near future. Further down the line, markets for corn and sunflower seeds are likely to open in East Asia.

U.S. Exports Maintain Competitive Edge

Most U.S. seed exports are destined for regions of the world with agro-climatic conditions similar to those in the U.S. These areas tend to produce crops that resemble U.S.-grown commodities. While many major importing countries—Canada, Mexico, Italy, France, the Netherlands, and Japan—have developed their own seed industries, U.S.-produced seed continues to be competitive in price and productivity compared with domestic varieties.

Evidence of strength in the U.S. seed export industry includes the strong growth in forage and vegetable seed exports, which accounted for over half of total U.S. seed exports last year, and strong growth in U.S.-produced seed that meets the stringent OECD standards.

U.S. grass and vegetable seed exports have continued to show strong growth during the 1990's. North American and European countries, and Japan, are the primary markets for these types of seeds. Japan's relatively short growing season reduces the potential for producing domestic seed, and the commodity price structure there favors use of land for commodity production over seed production.

Canada and Mexico historically have imported 16-40 percent of all U.S. exports of forage and vegetable seed. Canada imports large volumes of grass and sweet corn seed, while Mexico purchases alfalfa and many types of vegetable seed. Both countries are major producers of vegetables and forage crops and are therefore potential markets for new or old U.S. seed varieties.

Certified exports of U.S. seed are larger than those of foreign-developed seed varieties—another indicator of the growth and competitiveness of U.S.-produced seed varieties. The certification standards of OECD countries are set to meet certain genetic and purity standards. U.S.-produced seed that meets these standards can be exported to any other OECD country.

In recent years, the tonnage of OECD-certified seed amounted to about 15-20 percent of the total seed volume exported from the U.S. Over the last 25 years, the tonnage of U.S.-origin forage, soybean, bean, cereal, and corn seed varieties certified for export has grown much faster than varieties of foreign origin, and since 1981/82 has exceeded the foreign-origin varieties. U.S. varieties of soybeans, corn, and grain sorghum have accounted for most of the growth.

The U.S. seed export industry competes in more markets than any foreign producer. The U.S. also conducts more public and private seed development research on the widest variety of agricultural commodities than any other country. And for growers in Oregon's lush Willamette Valley—the nation's number-one grass seed producer and among the top producers in the world—seed production and export value has continued up during the 1990's, even through this year's interruption in export growth of U.S. seeds.

The competitiveness of U.S. seed exports is tied to public and private resources devoted to the development of new U.S. varieties. Trade agreements such as NAFTA and GATT will likely provide increased opportunities for U.S. seed exporters and importers as new global crop production patterns emerge.

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Farm Finance



FCS Seeks Expanded Role

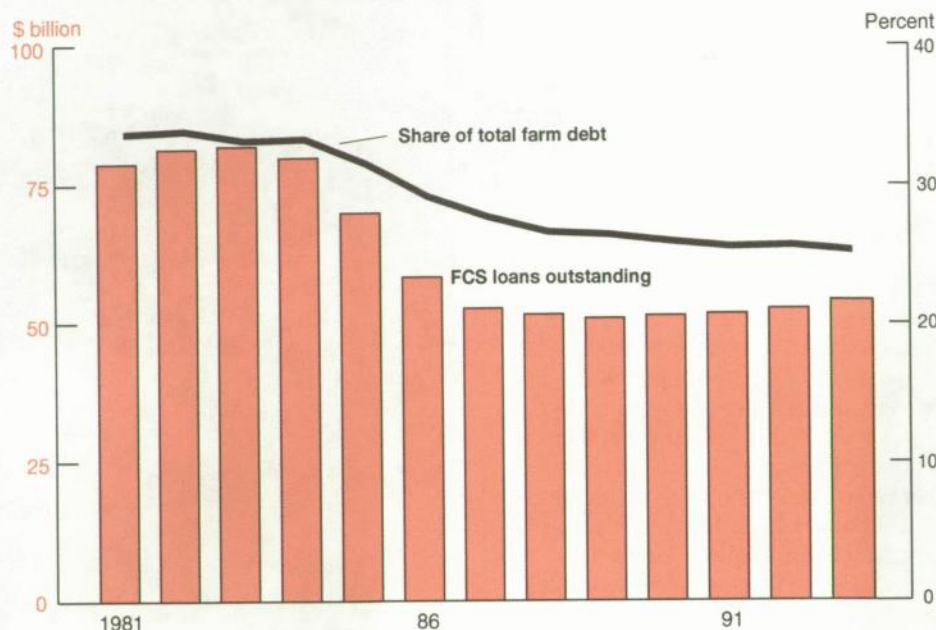
The Farm Credit System (FCS) is seeking to expand its lending authority in response to changes in agriculture and agricultural lending. The Farm Credit Council, the trade association for FCS institutions, favors expanding FCS activities in financing rural housing, infrastructure, and businesses, and commodity exports.

The FCS, like other farm lenders, is confronting changes in the agricultural sector that include a declining farm population, increasing farm size, and the diminishing importance of farming in the nation's economy. In addition, the production side of agriculture is being transformed by greater vertical integration, product specialization, and enterprise consolidation. The numbers of part-time farmers and very large operations continue to increase, while mid-sized family farms decline in number.

Rural America is also undergoing change. Agriculture was the dominant rural industry when the FCS was created, but this is no longer the case. Between 1975 and 1989, farm employment in non-

Farm Finance

FCS Has Lost Market Share of Farm Loans



End of calendar year. Other farm lenders include commercial banks, Farmers Home Administration, insurance companies, equipment dealers, and private individuals.

metro counties fell by almost 600,000, and the number of counties dependent on farm employment (where farming accounts for at least 25 percent of total employment) dropped from 750 to 335. Many rural areas are now economically dependent on manufacturing, tourism, or retirement.

During the 1980's, Congress granted Federal assistance to rescue the FCS, after the farm credit crisis depleted its retained earnings, cut its loan volume from \$78 to \$50 billion, and precipitated the failure of several FCS institutions—including the Federal Land Bank of Jackson. Recently, the FCS has operated profitably and rebuilt its capital base.

However, FCS loan volume has stagnated in nominal terms since 1988, and adjusted for inflation, has actually fallen. And despite the FCS's improved profitability, its operating costs per dollar loaned have increased. The FCS market share of total farm debt is currently about 25 percent, down from 33 percent in 1982. In contrast, commercial banks and input suppliers are expanding their shares of agricultural lending.

Rural & Export Lending Targeted

Set up by Congress in 1916, the Farm Credit System is a network of cooperatively owned financial institutions serving farmers, certain rural businesses, and rural residents. FCS institutions include Farm Credit Banks, Federal Land Bank Associations, Federal Land Credit Associations, Agricultural Credit Associations, Production Credit Associations, and Banks for Cooperatives. FCS institutions obtain their funds from the bond market.

Over the years, Congress has broadened the lending activities of the FCS considerably beyond its initial role of providing long-term, fixed-rate farm mortgages. Current authorities include lending to primary agricultural producers and their cooperatives, harvesters of aquatic products, specified farm-related businesses, buyers of moderate-priced rural homes in communities of less than 2,500, and certain rural utilities. Authorized activities of FCS also include financing specified agricultural exports.

The Farm Credit Council made several proposals in 1993 to expand FCS lending authority in two broad categories—export and rural financing. The Banks for Cooperatives are seeking broader powers to finance agricultural exports, while all FCS institutions are seeking greater authority to provide financing for rural housing, infrastructure, and commercial enterprises.

Exports. Under current law, Banks for Cooperatives may make loans for exports and imports only to eligible farmer-owned cooperatives, parties engaged in international transactions with stockholders of the bank, or to entities in which eligible cooperatives hold a specified minimum ownership interest. A temporary exception to these restrictions exists for commodity export loans guaranteed under Federal programs for former communist countries.

The Banks for Cooperatives are seeking authority to finance any agricultural exports, including value-added products, that originate in the U.S.—without regard to Federal guarantees or cooperative involvement. However, even if the requirement of farm cooperative involvement is eliminated, the Banks for Cooperatives plan to accord priority to financing exports of member cooperatives.

Housing. Specified FCS lending institutions are currently authorized to finance moderately priced, single-family homes in nonmetropolitan areas with populations not exceeding 2,500. These loans may not amount to more than 15 percent of all loans outstanding for any bank or association. The FCS is seeking to increase these limits to 20,000 in population and 20 percent of outstanding loans. Rural housing constitutes, on average, only about 3 percent of total FCS lending, but some FCS institutions are close to the current 15-percent limit.

Infrastructure. The FCS Safety and Soundness Act of 1992 provided Banks for Cooperatives broader authority to finance water and waste disposal facilities in rural areas. The act also removed the prohibition on enhancement of certain municipal tax-exempt debt. However, Internal Revenue Service

regulations still prevent the FCS from providing credit enhancements for tax-exempt municipal debt—a form of guarantee for investors. The FCS is currently seeking administrative changes to these Internal Revenue Service limitations.

The FCS is also proposing that all FCS lending institutions, not just Banks for Cooperatives, be given authority to provide credit services for supporting rural infrastructure. The FCS also wants to permit Banks for Cooperatives' to finance utility services, including purchase of services from nonmunicipal authorities such as electric cooperatives and community water corporations.

Businesses. Currently, farm-related businesses must serve the on-farm operating needs of farmers and ranchers in order to qualify for FCS financing. In addition, loans for purchasing products from farmers and ranchers may qualify for FCS financing only if 80 percent or more of the inputs originate from a member-borrower or cooperative. Often, businesses that process or market the products sold to them by cooperatives or member-borrowers do not meet the 80-percent requirement and therefore are not eligible for farm-related lending.

The FCS is seeking authority to eliminate this 80-percent requirement. As an alternative, the FCS is proposing that businesses be required simply to establish a materially beneficial link to farmer-owned member cooperatives in order to be eligible for financing. The FCS is also seeking authority to purchase and hold rural, nonfarm small business loans originated and serviced by banks and other lenders, such as rural development entities.

Rural Development. To assist in the revitalization of rural America, a priority of the current Administration, the FCS is requesting authority to make investments in rural development institutions to promote economic growth. These development entities would be set up to provide equity capital and financial services to beginning farmers, agricultural producers, and to rural enterprises attempting to comply with environmental mandates.

With expanded authority, the FCS would make equity investments in such organizations and would discount and participate in loans with them. The FCS is requesting that banks and other financial institutions also be allowed to make equity investments in rural development entities.

Lack of Competition In Rural Lending?

The FCS was created in 1916 to correct deficiencies in agricultural credit markets stemming from banking laws and regulations that limited the lending activities and geographic market of banks and thrift institutions. The initial rationale

for creating the FCS was the need to improve market efficiency because competition was restricted. Today, two factors indicate that greater efficiency could be achieved in rural credit markets if lending opportunities were expanded.

First, regulations that hamper competition among lending institutions exist in many states. Some 25 percent of rural counties are served by only one or two commercial banks. Banks in such counties may be able to earn excessive profits, an indication of market inefficiency.

Second, some characteristics of rural banks suggest efficiency gains in rural credit markets are possible. For example, nonmetro banks are on average more

Years of Expansion

1916

Federal Land Banks and Federal Land Bank Associations are created to provide long-term, fixed-rate mortgages to farmers.

1923

Federal Intermediate Credit Banks are created to provide a source of funds for operating credit for farmers.

1933

Production Credit Associations are created to provide short-term operating credit to farmers. Banks for Cooperatives are created to finance purchasing and marketing cooperatives.

1971

Federal Land Banks are allowed to lend up to 85 percent of market value of property (up from the previous limit of 65 percent of "agricultural" use value of property). Federal Land Banks and Production Credit Associations may loan to nonfarm rural homeowners.

FCS institutions, except Banks for Cooperatives, may make commercial

fishing and farm-related business loans.

Banks for Cooperatives are allowed to make rural utility loans.

1980

Banks for Cooperatives are allowed to make loans to finance agricultural exports that benefit U.S. farmer-owned cooperatives.

1990

Banks for Cooperatives may finance rural water and waste disposal systems.

1991

Banks for Cooperatives may make federally guaranteed loans for agricultural exports to newly emerging democracies.

1992

Banks for Cooperatives may provide a form of credit guarantee for tax-exempt municipal debt for rural communities.

Farm Finance

profitable, better capitalized, and smaller, and have lower loan-to-deposit ratios than their metro counterparts. The relatively more conservative lending practices of rural banks may stem from their inability to diversify risk, or to the lack of qualified borrowers in rural areas.

Efficiency gains in credit markets could enhance rural economic activity. If inefficiencies are preventing creditworthy borrowers from obtaining loans, rural communities suffer. Expanding powers of the FCS or removing banking regulations that limit risk diversification or market competition could address these market inefficiencies.

Authority for nonfarm-related lending by the FCS has been limited to financing rural utilities and infrastructure development, aquatic product harvesting operations, and moderately priced rural housing. If the FCS is allowed to make more loans for nonfarm-related business, farmers would share control of the system with other, sometimes competing, rural interests.

Expansion of lending opportunities could dilute farmers' control over the FCS and the System's focus on production agriculture. At a time when agriculture is already losing some of its political clout, some farmers may be uneasy about sharing control of the FCS with nonfarm borrowers.

But if inefficiencies still exist in rural credit markets, expansion of FCS lending authority could yield benefits for rural and national economic growth. An alternative to expanding FCS lending activities that could produce similar results would be the removal by Congress of regulations or other barriers to competition in agricultural credit markets, such as eliminating geographic restrictions on bank branching and interstate banking, and relaxing usury laws.

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Food & Marketing



New Nutrition Labels Make Debut

With many processed foods sporting new nutrition labels this month, consumers should find it easier to monitor their intake of nutrients such as fat, cholesterol, and fiber. Estimates indicate that the health benefits to the consumer of the new labeling rules will exceed the costs.

Beginning on May 8, nutrition labels become mandatory for the first time on almost all processed foods. For bulk processed foods, nutrition information must be displayed near bulk containers.

The new labels represent a rethinking of the kinds of information consumers need. Rather than focusing mainly on vitamins, the labels provide information that addresses other current concerns of consumers, such as saturated fat and cholesterol content. The new labeling regulations also contain strict definitions of "low-fat," "light," and other nutrition claims.

The regulations on nutrition labeling carry out the provisions of the Nutrition Labeling and Education Act of 1990 (NLEA). Before passage of NLEA, nutrition labels on all foods were voluntary, unless a nutrient was added or a nutrition claim was made on a package. The NLEA makes nutrition labels mandatory for processed foods regulated by the Food and Drug Administration, and requires FDA to draft and enforce the new labeling regulations.

While the NLEA covers only FDA-regulated foods, the USDA, which regulates meat and poultry, has developed a program of nutrition labeling for those products as well. USDA's Food Safety and Inspection Service worked closely with FDA, and both agencies issued labeling regulations in January 1993. Both USDA and FDA regulations will be mandatory for processed foods. The USDA regulations will go into effect on July 6, 1994.

The new FDA regulations provide a voluntary labeling program for raw vegetables, fruits, and seafood that covers the 20 most frequently consumed items from each category. USDA's labeling and information program is voluntary for raw meat and poultry, and covers the 20 highest selling cuts of each.

Strong incentives are built into the voluntary programs. FDA has had its voluntary nutrition labeling and information program in place since 1992 for the 20 top-selling raw fruit, vegetable, and seafood items. A recent FDA evaluation concluded that compliance was sufficient to keep the program on a voluntary basis. Both FDA and USDA plan to conduct surveys in 1995 to monitor compliance levels in their voluntary programs.

What's in a Label?

Some food products have already begun carrying the new labels, in advance of the May and July effective dates of the regulations. But because of the lag between the time some foods are processed and packaged and the time they appear on the shelves in food stores, not all food products will have their new labels when the regulations go into effect. Because the

Giving Meaning to the Labels

Under the new labeling regulations, a number of nutrient content terms must conform to specific definitions. Here are some prominent examples.

Calories

Calorie free: fewer than 5 calories per serving

Low calorie: 40 calories or less per serving; if the serving is 30 g or less, or 2 tablespoons or less, 40 calories per 50 g

Reduced or fewer calories: at least 25 percent fewer calories per serving than reference food

Fat

Fat free: less than 0.5 g of fat per serving

Saturated-fat free: less than 0.5 g per serving saturated fat, and less than 0.5 g per serving trans fatty acids

Low fat: 3 g or less of fat per serving; if the serving is 30 g or less or 2 tablespoons or less, 3 g per 50 g of the food

Low saturated fat: 1 g or less per serving, and not more than 15 percent of calories from saturated fatty acids

Reduced or less fat: at least 25 percent less per serving than reference food

Reduced or less saturated fat: at least 25 percent less per serving than reference food

Cholesterol

Cholesterol free: less than 2 mg of cholesterol, and 2 g or less of saturated fat per serving

Low cholesterol: 20 mg or less of cholesterol and 2 g or less of saturated fat per serving; if the serving is 30 g or less, or 2 tablespoons or less, 20 mg per 50 g of the food

Reduced or less cholesterol: at least 25 percent less cholesterol and 2 g or less saturated fat per serving than reference food

Sodium

Sodium free: less than 5 mg per serving

Low sodium: 140 mg or less per serving; if serving is 30 g or less, or 2 tablespoons or less, 140 mg per 50 g of the food

Very low sodium: 35 mg or less per serving; if the serving is 30 g or less, or 2 tablespoons or less, 35 mg per 50 g food

Reduced or less sodium: at least 25 percent less per serving than reference food

Fiber

High fiber: 5 g or more per serving (foods making high-fiber claims must meet the criterion for low fat, or the level of total fat must appear next to the high-fiber claim.)

Good source of fiber: 2.5 g to 4.9 g per serving

More or added fiber: at least 2.5 g more per serving than reference food

Serving size = Reference amount customarily consumed

labels apply to foods packed after the effective dates, fruits and vegetables canned or frozen last summer are not required to bear the new labels.

While interest in healthful diets has grown, many consumers report confusion and lack of clarity on what changes to make in their diets. A recent study by USDA's Economic Research Service (ERS) suggests that consumers may make some changes that cancel out the benefits of others. For example, some women who reduced their intake of red

meats also increased their consumption of dairy products and oils, with little net effect on total fat intake.

The new nutrition labels contain features designed to assist consumers in making healthful food choices and to make it easier to calculate the amounts and proportions of various dietary components. Besides changing the format and content of the nutrition labels, the new regulations standardize serving sizes, define specific nutrient content claims, and specify what health claims are allowed.

Information that did not appear on the old, voluntary labels and which is now mandatory, includes the following:

- number of calories derived from fat;
- amount of saturated fat, cholesterol, and dietary fiber;
- percent of daily value of each nutritional component (e.g., 20 percent of daily value of fat);

Food & Marketing

- standardized serving size; and
- recommended daily amounts of total fat, saturated fat, cholesterol, sodium, total carbohydrates, and dietary fiber in a 2,000- and a 2,500-calorie diet.

In addition, any nutrient content claims—such as “low-fat,” “light,” “reduced fat,” and “low cholesterol”—must follow strict guidelines on definition and use of terms so that consumers are not misled.

Benefits Outweigh Costs

Scientific evidence increasingly makes clear that diet affects long-term health as well as longevity. The average American diet—high in calories, fat, saturated fat, and sodium, and low in fiber-containing foods—is associated with increased risk of heart disease, obesity, hypertension, and certain types of cancer.

The benefits of labeling. The benefits were quantified in regulatory impact analyses by FDA and USDA by estimating the decrease in medical costs and productivity that would result if the incidence of diet-related disease is reduced. Calculation of benefits focused on the expected reduced intake of fat, saturated fat, and cholesterol associated with improvements in nutrition information available to consumers.

Reduction in dietary fat was assumed to result in a decrease in the number of cancer cases and early deaths after a lag of 10 years. Reducing cholesterol and saturated fat intake was assumed to decrease the incidence of heart disease and associated mortality after a lag of 2 years.

Not all consumers are likely to take advantage of the new nutrition labels—survey data suggest that less than half are likely to look for, read, and/or understand nutrition labels. FDA and USDA estimated there would be significant benefits even with limited consumer response.

The regulatory impact analyses expanded on the results of a shelf-labeling study carried out by FDA and Giant Foods, Inc.—a study that measured actual consumer response to new nutrition information. In that study, shelf labels were used to call consumers' attention to products that were low in fat, saturated fat, cholesterol, and/or sodium. Market share changes attributed to the information were estimated. These market share changes were converted into changes in food consumption and nutrient intake for the U.S. population.

The shelf-labeling program was estimated to result in an average reduction in fat intake of slightly more than 1 percent. Considering that the average intake of fat in the U.S. is about 37 percent of calories consumed—more than 20 percent higher than recommended—the change was fairly small. However, according to the impact analyses by FDA and USDA, even this small reduction in fat intake would prevent 18,700 early deaths of cancer or heart disease, saving over 117,900 life-years over a period of two decades. The monetary value associated with life-years saved was estimated to be more than \$4.5 billion over 20 years.

The costs of labeling. Costs to industry include startup expenses as well as some recurring costs. The startup costs of the new nutrition regulations include those associated with formulating management policy on new labels, conducting nutrient content analyses, designing and printing

new labels, and replacing the inventory of old labels. Recurring costs are involved in continuously verifying the nutrient content analyses. FDA and USDA have estimated that the new nutrition labeling regulations would cost industry between \$1.6 and \$2.6 billion over a period of 20 years.

The estimated benefits of the new nutrition label—\$4.5 billion—are significantly larger than the estimated costs to industry of \$1.6-\$2.6 billion. Also, the benefits calculated were based on consumer response to shelf labels, and may underestimate response to food product labels. In addition, food manufacturers may reformulate some products to improve the nutrition profile, given the high visibility of this information under the new labeling regulations, which could further improve dietary intakes.

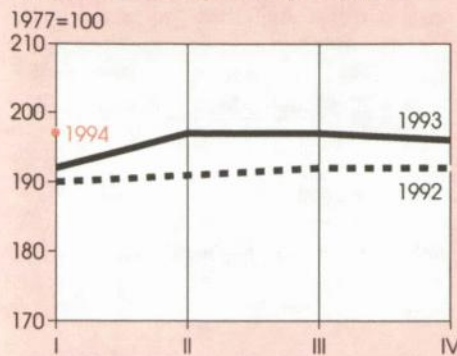
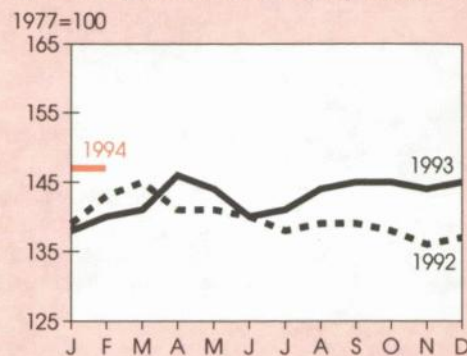
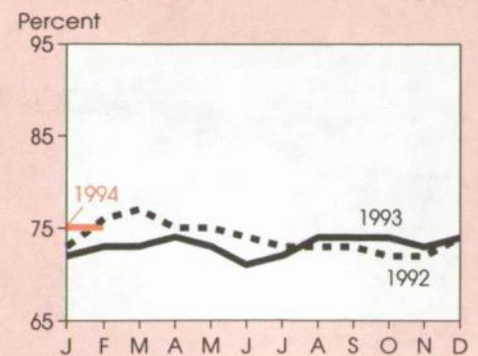
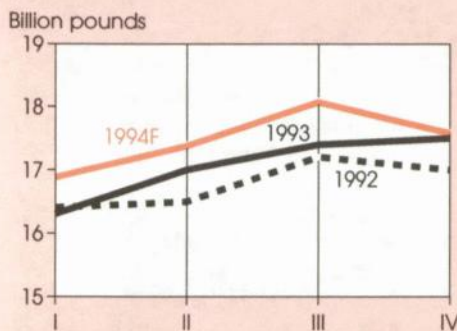
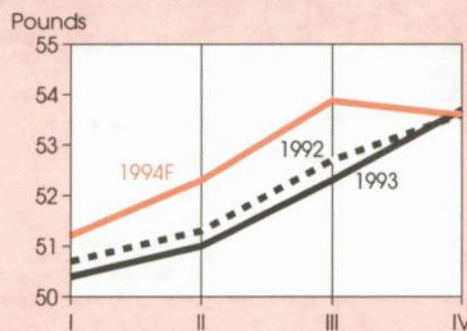
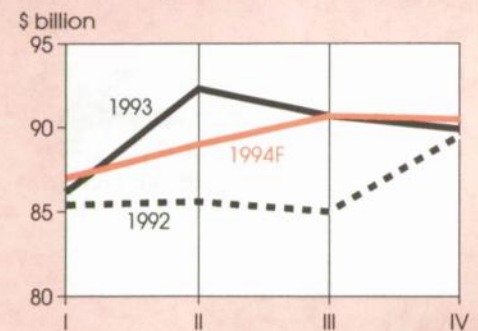
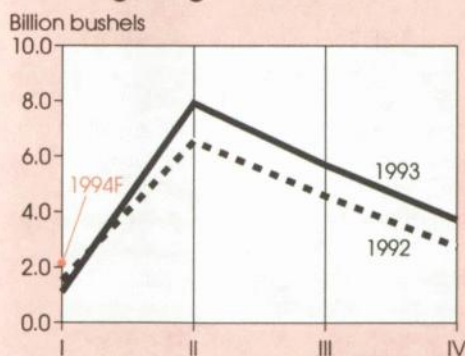
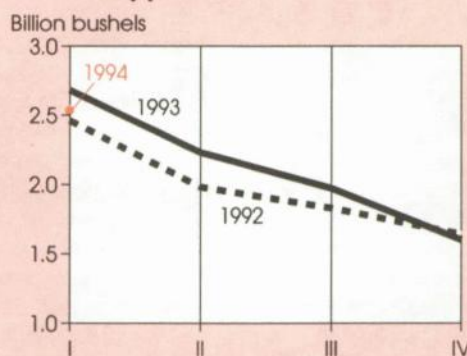
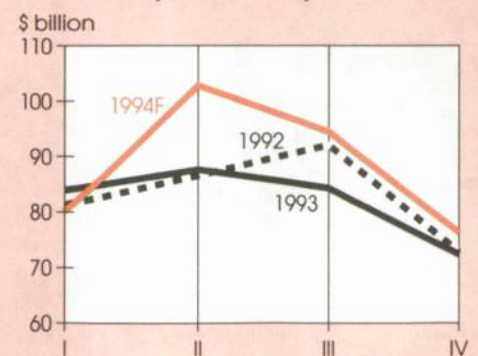
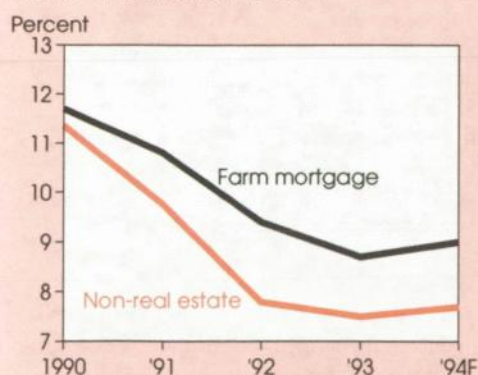
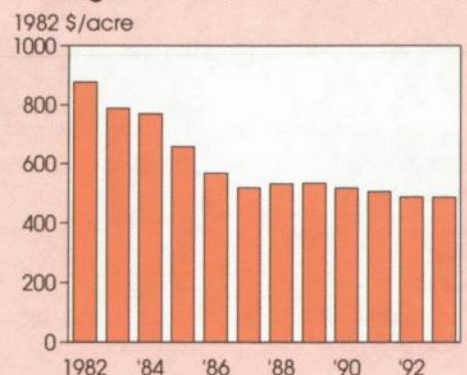
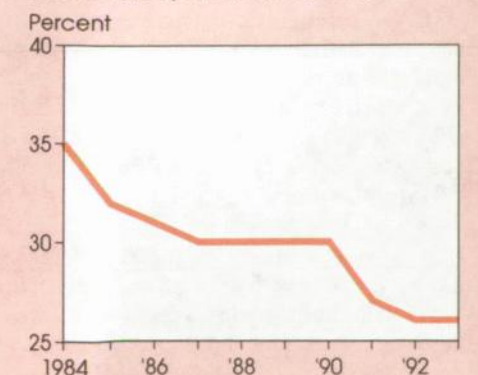
The Next Step: Improving Food Products

USDA and other government agencies are unveiling new programs to educate the general public as well as disadvantaged groups about how best to use the new labels to meet their individual dietary needs. The food industry is collaborating in this effort and has worked with health professionals in developing educational materials.

The food industry is also developing new products through reformulating foods to contain less fats, for example, and by using new technology to enhance the nutrition of traditional foods. The technology to develop traditional foods that are lower in fat or saturated fat is expected to improve the availability and taste of these alternative products in the next few years.

[Betsy Frazao (202) 219-0864] **AO**

Prime Indicators

Index of prices paid by farmers

Index of prices received by farmers ¹

Ratio of prices received/prices paid

Total red meat & poultry production ²

Red meat & poultry consumption, per capita ^{2,3}

Cash receipts from livestock & products ⁴

Corn beginning stocks ⁵

Corn disappearance ⁵

Cash receipts from crops ⁴

Farm loan interest rates

Average real value of farm real estate

Farm value/retail food costs


¹ For all farm products. ² Calendar quarters. Future quarters are forecasts for livestock, corn, and cash receipts. ³ Retail weight.

⁴ Seasonally adjusted annual rate. ⁵ ¹=Sept.-Nov.; ²=Dec.-Feb.; ³=Mar.-May; ⁴=June-Aug. Marketing years ending with year indicated. F=forecast.

Special Article



Jock Kelly Clark courtesy University of California Statewide IPM Project

Integrated Pest Management: How Far Have We Come?

As American farmers begin their spring crop planting and cultivating, many are using alternative methods of pest control. Over half of the nation's fruit, vegetable, and major field crop producers are now applying some level of integrated pest management (IPM), according to results from USDA's first comprehensive national study of pest control methods used in U.S. agriculture.

USDA research and extension programs on the IPM approach have been building for over two decades, along with state and industry efforts. The new study, based on a set of ongoing surveys which began in 1991, is designed to measure the extent of IPM adoption for over 50 U.S. crops. The surveys are being conducted jointly by USDA's Economic Research Service (ERS) and National Agricultural Statistics Service (NASS).

IPM provides more efficient and sustainable pest control, and has been linked with a reduction in pesticide use. The Clinton Administration's pesticide proposal released in April, which focuses on food safety and the protection of public health and the environment, endorses the use of IPM.

The IPM approach has always included a number of biological and other nonchemical pest control strategies as well as more efficient use of pesticides through monitoring pest levels. In response to growing public interest in a cleaner environment and reduced use of chemicals, biological methods are increasingly being scrutinized for use in IPM programs.

The new study indicates that pest monitoring as well as a few specific biological strategies—pheromones for fruit and nut crops, for example, to disrupt pest breeding—were widely adopted. However, few growers used beneficial insects or many of the other biocontrol methods.

The Alternative Approaches To Pest Control

Before the widespread availability of synthetic pesticides, which began in the 1940's for most crops, field sanitation, planting dates, and other physical and cultural methods were used to control pests. Crop rotation and other biological controls, as well as plant-derived pesticides, were also used.

Synthetic pesticides were rapidly adopted by farmers soon after they became available because they were relatively inexpensive, easy to apply, and effective. *Conventional pest control* since that time has generally been defined as the use of these pesticides on a routine (calendar or pest-growth stage) basis to completely eradicate the pest from the environment. In contrast, *organic pest control* is characterized by the complete exclusion of synthetic pesticides from the production process, relying solely on biological and other nonchemical methods.

The IPM approach combines economic use of pesticides—an application is made only when pests reach economically damaging levels—with the use of biological, cultural, and other nonchemical control methods. The objective of pest control under IPM is to limit the growth of pest populations to below economically damaging levels. This approach began evolving in the 1950's as entomologists and other agricultural scientists became concerned about the unintended effects of pesticides—such as killing nontarget species and increasing pest resistance to pesticides.

Federal funding of IPM began in the 1970's, and commodities included crops using high levels of pesticides (cotton, soybeans, citrus, apples, and celery). As demand for IPM consulting services has increased since the mid-1970's, commercial consultants have developed their own IPM programs for many other crops. In addition to hiring private IPM consulting firms, farmers may also use USDA's Extension Service, co-ops, other grower organizations, and chemical company representatives for IPM services, and some farmers implement IPM on their own.

IPM programs have been designed as a more profitable and efficient alternative to conventional chemical control methods, and most have been developed to reduce pesticide use as well. A recent Virginia Tech national analysis of over two decades of

IPM field trials, regional surveys, and other studies indicated that IPM practices reduced pesticide use in seven of the eight commodities studied.

IPM's Spectrum Of Strategies

Information is the most fundamental component of the IPM approach. An IPM program begins with basic research—on the pest biology, ecology, and taxonomy of a local cropping system—which lays the foundation for developing and integrating the control techniques for that particular commodity.

The cornerstone of IPM programs has traditionally been the use of scouting (monitoring pest levels) to make pesticide decisions. Pest population levels are closely monitored and compared with economic thresholds. The *economic threshold*, or pest population level, at which pests are considered damaging depends on crop prices, pesticide cost, the types of pests, pest population densities, and other factors.

Economic thresholds are derived separately for each crop and each crop pest, and require knowledge of agricultural ecosystems, naturally occurring biological controls, and the effects of possible control actions on other organisms in the environment. Newer pesticides which target specific pests, and are less toxic to beneficial insects, are chosen for IPM programs, while conventional pest control has typically used older, broad-spectrum pesticides.

In addition, certain pesticide application methods, particularly for herbicides, may be chosen for IPM programs. *Postemergence application* of herbicide (instead of preemergence application) allows farmers to identify weed species and check infestation levels before treating, and to treat small weeds at application rates lower than the recommended amounts. Also, herbicides are generally either banded over rows or are broadcast, and *banded application* may be chosen for IPM programs since banded rates are substantially lower than *broadcast* rates.

IPM programs may also use *biological controls*, such as natural enemies of crop pests and crop rotation, which have been evolving for over a hundred years. With *crop rotation*, farmers grow the same crop in the same field only every 2 or 3 years to give beneficial soil organisms, such as pest parasites and predators, more time to fight crop pests and to break pest life cycles.

Natural enemies, including beneficial insects such as the *Trichogramma* wasp, are used to fight or inhibit crop pests, and their populations are often augmented with mass-rearing and multiple releases per season in a field. A current example of the use of natural enemies is release of the microscopic predator wasp to control spider mites in strawberry fields in California.

Pheromones—hormonal chemicals produced by the female of a species to attract a mate—are used to disrupt the mating cycles of crop pests, and are another example of biological pest

control. And a number of *biotechnological tools* may hold promise for enhancing the self-defense system of a crop plant. For example, an insect pathogen has been engineered into a tomato plant, and is in the testing phase.

IPM programs also use *physical and cultural controls*, including pruning, field sanitation, and irrigation practices. These strategies are used to control population levels of crop pests. *Strategic controls*, such as planting locations and timing, are used to avoid certain pests and are also among the arsenal of IPM control tactics.

Use of Scouting Method Is Widespread . . .

The ERS-NASS survey asked growers if they used the scouting method—monitoring fields to determine pest population levels and comparing these levels with economic thresholds—in making their pesticide decisions for insecticides, fungicides, and herbicides. More than half the surveyed farmers reported using this technique.

USDA Pest Control Surveys

In 1991, USDA began an ongoing pest control survey program with funding from two initiatives. The objectives of this new program were to collect pesticide use information on fruits and vegetables for the first time in over a decade, and to collect comprehensive information on the use of IPM and its spectrum of control tactics for the first time ever.

The cropping practices surveys, funded under the Water Quality Initiative, cover mainly field crops as well as fall potatoes. USDA's Pesticide Data Program (PDP), funded under the Food Safety Initiative, surveys fruit and vegetable growers with alternate-year surveys (fruit surveys in odd years and vegetables in even years). The data reported in this article from these surveys were collected in 1991 for fruits, in 1992 for vegetables, and in 1993 for field crops.

The 1991 fruit and nut survey targeted 30 different commodities in 13 states. The survey covered a high percentage of fruit and nut acreage, ranging from 79 percent on peaches to 100 percent on 11 commodities. The 1992 vegetable survey covered 20 different commodities in 14 states, accounting for most of U.S. vegetable acreage. The 1993 cropping practices surveys included pest management questions for corn in 10 major producing states (78 percent of acreage), soybeans in eight major producing states (72 percent of acreage), and fall potatoes in four major producing states (Idaho, Maine, Oregon, and Washington, covering 48 percent of U.S. acreage).

Special Article

An IPM Glossary

Economic thresholds—levels of pest population which if left untreated would result in reductions in revenue that exceed treatment costs; the use of economic thresholds in making pesticide treatment decisions requires information on pest infestation levels from scouting.

Field mapping—drawing a map of a field indicating locations where specific weed species were present in the past; when preemergence herbicides are applied, farmers treat only the areas with infestation (spot treatment).

Band pesticide application—the spreading of pesticides (herbicides, insecticides, or fungicides) over, or next to, each row of plants in a field; often requires row cultivation to control weeds in the row middles.

Broadcast pesticide application—the spreading of pesticides (herbicides, insecticides, or fungicides) over the entire surface area of a field.

Pests—insects, diseases, or weeds (uncultivated plants which naturally exist in the environment) that cause damage to crops, resulting in reductions in yield, crop quality, or both.

Pest control—Conventional approach to pest control refers to eradication, completely eliminating an organism from the environment. Pest control in *integrated pest management* (IPM) is to limit the growth of pest populations to below economically damaging levels.

Preemergence herbicides—herbicides applied before weeds emerge, the foundation of row crop weed control for the past 30 years.

Postemergence herbicides—herbicides applied after weeds emerge, considered more environmentally sound than preemergence herbicides because they have little or no soil residual activity.

Scouting—inspecting fields for pests to determine whether pest populations have reached levels that warrant intervention, and to help determine the appropriate method of control.

Trap cropping—planting a small plot of a crop earlier than the rest of the crop in order to attract a particular crop pest; pesticides are used to kill the pest before the rest of the crop becomes susceptible to attack.

Many farmers have been trained by USDA's Extension Service to scout their own fields. Vegetable and field crop producers were asked whether they had their acreage professionally scouted or whether they scouted the acreage themselves. However, estimates for fruit and nut acres using scouting are underestimated because the survey limited scouting for these crops to professional service providers only.

More than 50 percent of most major fruit and nut acreage was professionally scouted for insects, diseases, or weeds. For fruit and nut crops, the scouting method was used extensively on pistachios, tangerines, nectarines, and olives, but rarely on dates, limes, and blackberries. Adoption rates for the three most highly valued U.S. fruit crops—apples, oranges, and grapes—were 43, 64, and 54 percent. Fruit growers were also asked which pests they scouted for, and indicated that scouting for insects was most common, followed by scouting for diseases, and then for weeds.

Almost 60 percent of all vegetable acres used the scouting method for insects, diseases, or weeds. Scouting was adopted at relatively high rates on broccoli, celery, lettuce, and strawberries, and at relatively low rates on green peas and snap beans. The use of the scouting method on vegetable farms ranged from about 40 percent on green peas to over 80 percent on lettuce. For potatoes and tomatoes, the highest valued vegetable crops, about 76 and 66 percent of growers used the scouting method.

As with the vegetable rates, the scouting method was used on a very high percentage of corn and soybean acreage. The scouting method was used to determine herbicide applications on over 50 percent of soybean acres; soybeans are rarely treated with insecticides or fungicides.

For determining herbicide applications on corn, the scouting method was used on over 50 percent of the acreage. Corn is rarely treated with fungicides, so the scouting method is rarely needed for corn fungus. The scouting method was used on only 29 percent of corn acres for determining insecticide applications, because another IPM technique, crop rotation, is frequently used to control corn insects. The majority of corn farmers rotate corn with another crop to effectively alleviate corn rootworm problems and hence reduce the need for insecticide use.

... But Adoption Lags For Biological Controls

The IPM approach to pest management emphasizes the use of multiple tactics—cultural, biological, and other forms of control along with pesticides—to enhance the effectiveness of natural control mechanisms. The study found that the majority of farmers who used the scouting method to apply pesticides were also using one or more other pest control tactics as well, although use of many specific strategies, such as beneficial insects, was

Scouting, the Most Common IPM Method Surveyed...

Selected crops ¹	Surveyed area	Conven- tional pest control	Integrated pest management pracices															
			Scouting ²	Bene- ficial insects	Water manage- ment	Phero- mones	Limit pesticide rate ³	Pesticide selection ³	Adjust planting dates	Rotate pesticide use	Soil testing							
	1,000 acres		—	—	—	—	—	—	Percent of planted acres				—	—	—	—	—	—
Sweet corn	640	41	59		0	7	17	36	26	8	48		15					
Tomatoes	357	34	66		5	21	6	41	38	47	26		42					
Green peas	329	60	40		0	2	0	16	20	7	16		9					
Melons	326	41	59		15	18	0	61	62	15	41		18					
Lettuce	259	17	83		3	4	1	19	34	26	54		39					
Snap beans	224	48	52		0	1	3	36	28	2	47		20					
All vegetables	2,914	41	59		3	11	7	37	38	15	44		26					

¹1992 data.²Top six (by acreage) of the 20 vegetable crops surveyed. Survey covered between 71 and 100 percent of U.S. acreage of these crops. ³Includes use of economic thresholds in pesticide application. ⁴To protect beneficial insects.

...Was Used on Over Half of Fruit and Nut Acreage

Selected crops ¹	Surveyed area	Conven- tional pest control	Integrated pest management practices																
			Scouting ²	Bene- ficial insects	Phero- mones	Water Manage- ment	Pruning/ canopy manage- ment	Field sani- tation	Resistant crop varieties	Planting locations	Trap crops								
	1,000 acres		—	—	—	—	—	—	Percent of planted acres				—	—	—	—	—	—	
Grapes	730	46	54		18		14		41		56		64		31		21		16
Oranges	613	36	64		22		28		27		44		48		21		6		6
Apples	381	57	43		24		66		22		70		73		16		9		10
Almonds	380	46	54		14		62		54		40		82		16		7		5
Peaches	143	73	27		9		28		15		46		66		20		15		6
Plums & prunes	131	66	34		13		52		17		27		53		16		5		10
All fruits & nuts	3,251	49	51		19		37		31		47		60		22		11		9

¹1991 data.²Top six (by acreage) of the 30 fruit and nut crops surveyed. Survey covered between 70 and 100 percent of U.S. acreage of these crops. ³Includes use of economic thresholds in pesticide application.

...and Over Half of Corn and Soybean Acreage

Selected crops ¹	Surveyed area	Conven- tional pest control	Integrated pest management practices								Weed spot treatment
			Scouting ²		Crop rotation to control:		Rotating pesticides to slow resistance to:		Row cultivation to control weeds		
			Weeds	Insects	Weeds	Insects	Herbicides	Insecticides			
Mil. acres			Percent of planted acres								
Corn	57.3	23	53	29	52	52	52	50	52	28	
Soybeans	42.5	41	59	NA	78	NA	55	NA	38	3	

¹1993 data.NA = Not applicable. Survey covered 78 percent of total U.S. corn acreage and 72 percent of U.S. soybean acreage. ²Includes use of economic thresholds in pesticide application.

Special Article

lagging. Only about 16 percent of farmers who were using the scouting method did not use any other pest control strategy, while 22 percent of these farmers were using one or two other strategies and 30 percent were using three or more other strategies.

Pheromones, pruning, and field sanitation were commonly adopted for many fruit and nut crops, and are perhaps better understood and more easily and cheaply adopted than other practices. Less commonly adopted strategies included the use of beneficial insects, pest-resistant crop varieties, and irrigation practices. These approaches may be less documented, more expensive, or require greater managerial input for adoption than other strategies. The use of trap crops and strategic planting locations were also used on only a small portion of most fruit and nut acreage.

For the vegetable industry (excluding potatoes), alternating pesticides to slow pest resistance was the most frequently used strategy in addition to the scouting method, with an adoption rate of 44 percent, followed by protection of beneficial insects through pesticide selection (38 percent), and reduced application rates (37 percent). Soil analysis for pests was also common for certain vegetables, including celery (80 percent) and broccoli (58 percent). For potatoes, use of soil analysis for pests, crop rotation to combat pests, and alternating pesticides to slow down pest resistance were commonly practiced.

Get the full story on IPM in . . .

The Extent of Adoption of Integrated Pest Management in U.S. Agriculture

Based on IPM data from USDA's pest control surveys, and covering:

- field crops
- fruit and nuts
- vegetables

Available this summer from the
Economic Research Service

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However, beneficial insects were purchased and released for only a limited number of vegetables and on few acres—strawberries had the highest rate at 37 percent of acres, followed by melons, with 15 percent. Lower adoption rates may be due to the expense of purchasing beneficials or to uncertainty among growers about their efficacy.

For corn and soybeans, as for potatoes, common practices also included crop rotation and alternating use of pesticides. Additionally, small percentages of corn and soybean acres received spot treatments for weeds.

The postemergence herbicide application method was commonly used on corn, soybeans, and potatoes. And when using preemergence herbicides, farmers sometimes used field mapping to limit herbicides to locations with weed infestation in the past. However, the bulk of herbicides used for these three crops was applied as broadcast treatments.

Barriers & Priorities

As expected, IPM adoption and the intensity of adoption varied widely by crop. Factors in the variation include:

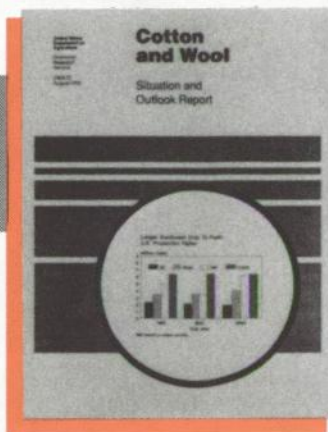
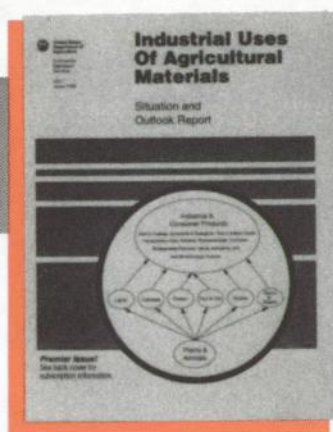
- different levels of IPM research and extension programs—some crops have longstanding private or Federal programs;
- regional differences in the strength of IPM programs; and
- the economic importance of the crop—very small crops tend to show lower rates of IPM adoption.

Also, the reason for some farmers' hesitation to adopt IPM may be that alternative pest management practices are unavailable, economic incentives to adopt alternative practices are lacking, awareness of available practices is inadequate, or managerial demands could be higher for IPM implementation. These reasons may explain why many farmers have not moved to a higher level of IPM use—incorporating nonchemical pest controls into their program.

The ultimate goal shared by USDA, the Food and Drug Administration, and the Environmental Protection Agency is to reduce health and environmental risks associated with pesticide use in agriculture. Given limited resources, the development and implementation of IPM programs for crops with high health or environmental risks will yield the greatest risk reduction benefits. [Biing-Hwan Lin (202) 219-0459, field crops; Ann Vandeman (202) 219-0434, fruit and nut crops; Jorge Fernandez-Cornejo (202) 219-0462 and Sharon Jans (202) 219-0460, vegetable crops] **AO**

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Statistical Indicators

Summary Data

Table 1.—Key Statistical Indicators of the Food & Fiber Sector

	1993				1994				
	II	III	IV	Annual	I	II F	III F	IV F	Annual F
Prices received by farmers (1977=100)	146	141	145	143	147	—	—	—	—
Livestock & products	167	161	159	162	159	—	—	—	—
Crops	125	121	130	123	135	—	—	—	—
Prices paid by farmers, (1977=100)									
Production items	180	179	181	179	182	—	—	—	—
Commodities & services, interest, taxes, & wages	196	195	196	195	197	—	—	—	—
Cash receipts (\$ bil.) 1/	181	176	171	175	—	—	—	—	—
Livestock (\$ bil.)	92	91	89	90	—	—	—	—	—
Crops (\$ bil.)	89	85	81	85	—	—	—	—	—
Market basket (1982-84=100)									
Retail cost	142	142	144	142	—	—	—	—	—
Farm value	107	104	104	105	—	—	—	—	—
Spread	160	162	165	162	—	—	—	—	—
Farm value/retail cost (%)	27	26	25	26	—	—	—	—	—
Retail prices (1982-84=100)									
Food	141	141	142	141	143	—	—	—	—
At home	140	140	141	140	143	—	—	—	—
Away from home	143	144	144	143	145	—	—	—	—
Agricultural exports (\$ bil.) 2/	10.1	9.2	11.9	42.6	11.4	10.0	9.2	—	42.5
Agricultural imports (\$ bil.) 2/	6.3	5.7	6.6	24.5	6.2	5.9	5.8	—	24.5
Commercial production									
Red meat (mil. lb.)	9,992	10,362	10,502	40,568	10,082	10,098	10,523	10,404	41,107
Poultry (mil. lb.)	6,991	7,034	6,973	27,539	6,860	7,375	7,420	7,225	28,880
Eggs (mil. doz.)	1,474	1,490	1,535	5,960	1,490	1,495	1,505	1,545	6,035
Milk (bil. lb.)	39.4	37.4	36.6	151.0	37.3	39.3	37.8	37.3	151.6
Consumption, per capita									
Red meat and poultry (lb.)	51.1	52.4	53.8	207.6	51.1	52.3	53.5	53.8	210.7
Corn beginning stocks (mil. bu.) 3/	7,906.4	5,678.2	3,709.4	1,100.3	2,113.0	5,936.5	3,994.7	—	2,113.0
Corn use (mil. bu.) 3/	2,229.2	1,970.8	1,599.3	8,476.1	2,525.7	1,949.9	—	—	7,650.0
Prices 4/									
Choice steers—Neb. Direct (\$/cwt)	79.78	73.77	71.23	76.36	73.1	72-78	70-76	72-78	71-77
Barrows & gilts—IA, So. MN (\$/cwt)	47.59	48.05	43.93	46.10	45.8	45-51	46-52	43-49	44-50
Broilers—12-city (cts./lb.)	55.8	56.9	54.9	55.2	54.8	54-60	54-60	51-57	53-59
Eggs—NY gr. A large (cts./doz.)	73.4	69.6	71.5	72.5	71.5	62-68	66-72	70-76	67-73
Milk—all at plant (\$/cwt)	12.90	12.67	13.43	12.83	13.57	12.90-13.90	11.85-12.85	12.15-13.15	12.60-13.40
Wheat—KC HRW ordinary (\$/bu.)	3.48	3.36	3.69	3.59	—	—	—	—	—
Corn—Chicago (\$/bu.)	2.27	2.36	2.72	2.38	—	—	—	—	—
Soybeans—Chicago (\$/bu.)	5.95	6.66	6.48	6.18	—	—	—	—	—
Cotton—Avg. spot 41-34 (cts./lb.)	55.6	53.8	56.8	55.4	70.7	—	—	—	—
	1985	1986	1987	1988	1989	1990	1991	1992	1993 F
Farm real estate values 5/									
Nominal (\$ per acre)	713	640	599	632	661	668	681	684	700
Real (1982 \$)	657	568	518	530	533	517	505	487	486

1/ Quarterly data seasonally adjusted at annual rates. 2/ Annual data based on Oct.-Sept. fiscal years ending with year indicated. 3/ Sept.-Nov. first quarter; Dec.-Feb. second quarter; Mar.-May third quarter; Jun.-Aug. fourth quarter; Sept.-Aug. annual. Use includes exports & domestic disappearance. 4/ Simple averages, Jan.-Dec. 5/ 1990-93 values as of January 1. 1986-89 values as of February 1. 1985 values as of April 1. F = forecast, — = not available.

U.S. & Foreign Economic Data

Table 2.—U.S. Gross Domestic Product & Related Data

	Annual			1992	1993			
	1991	1992	1993	IV	I	II	III	IV R
\$ billion (quarterly data seasonally adjusted at annual rates)								
Gross domestic product	5,722.9	6,038.5	6,377.9	6,194.4	6,261.6	6,327.6	6,395.9	6,526.5
Gross national product	5,737.1	6,045.8	6,378.1	6,191.9	6,262.1	6,327.1	6,402.3	6,520.9
Personal consumption expenditures	3,906.4	4,139.9	4,391.8	4,256.2	4,296.2	4,359.9	4,419.1	4,492.0
Durable goods	457.8	497.3	537.9	516.6	515.3	531.6	541.9	562.8
Nondurable goods	1,257.9	1,300.9	1,350.0	1,331.7	1,335.3	1,344.8	1,352.4	1,367.5
Clothing & shoes	213.0	228.2	237.3	236.1	233.1	235.2	238.2	242.7
Food & beverages	621.4	633.7	657.8	647.6	648.2	654.1	660.0	669.1
Services	2,190.7	2,341.6	2,503.9	2,407.9	2,445.5	2,483.4	2,524.8	2,561.8
Gross private domestic investment	736.9	796.5	891.7	833.3	874.1	874.1	884.0	934.5
Fixed investment	745.5	789.1	876.1	821.3	839.5	861.0	876.3	927.6
Change in business inventories	-8.6	7.3	15.6	12.0	34.6	13.1	7.7	6.9
Net exports of goods & services	-19.6	-29.6	-63.6	-38.8	-48.3	-65.1	-71.9	-69.1
Government purchases of goods & services	1,099.3	1,131.8	1,158.1	1,143.8	1,139.7	1,158.6	1,164.8	1,169.1
1987 \$ billion (quarterly data seasonally adjusted at annual rates)								
Gross domestic product	4,861.4	4,986.3	5,136.0	5,068.3	5,078.2	5,102.1	5,138.3	5,225.6
Gross national product	4,874.5	4,994.0	5,138.6	5,068.4	5,080.7	5,104.1	5,145.8	5,223.7
Personal consumption expenditures	3,258.6	3,341.8	3,453.2	3,397.2	3,403.8	3,432.7	3,469.6	3,506.9
Durable goods	426.6	456.6	490.0	473.4	471.9	484.2	493.1	510.9
Nondurable goods	1,048.2	1,062.9	1,088.1	1,081.8	1,076.0	1,083.1	1,093.0	1,100.2
Clothing & shoes	184.7	193.7	199.5	200.0	194.8	197.8	200.6	204.6
Food & beverages	518.7	520.5	531.0	529.3	526.7	528.6	532.6	536.0
Services	1,783.8	1,822.3	1,875.2	1,842.0	1,855.9	1,865.4	1,883.5	1,895.8
Gross private domestic investment	675.7	732.9	820.3	763.0	803.0	803.6	813.4	861.4
Fixed investment	684.1	726.4	806.0	754.3	773.7	790.6	806.9	852.9
Change in business inventories	-8.4	6.5	14.3	8.7	29.3	13.0	6.5	8.5
Net exports of goods & services	-19.1	-33.6	-76.5	-38.8	-59.9	-75.2	-86.3	-84.5
Government purchases of goods & services	946.3	945.2	938.9	946.9	931.3	941.1	941.7	941.7
GDP implicit price deflator (% change)	3.9	2.9	2.6	3.3	3.6	2.3	1.6	1.3
Disposable personal income (\$ bil.)	4,230.5	4,500.2	4,706.7	4,657.6	4,597.5	4,692.2	4,723.7	4,813.5
Disposable per. income (1987 \$ bil.)	3,529.0	3,632.5	3,700.9	3,717.6	3,642.6	3,694.4	3,708.7	3,757.9
Per capita disposable per. income (\$)	16,741	17,615	18,225	18,153	17,876	18,196	18,265	18,561
Per capita dis. per. income (1987 \$)	13,965	14,219	14,330	14,490	14,163	14,326	14,341	14,491
U.S. population, total, incl. military abroad (mil.) 1/	252.6	255.5	258.2	256.5	257.2	257.8	258.5	259.2
Civilian population (mil.) 1/	250.5	253.5	256.4	254.6	255.3	256.0	256.7	257.5
	Annual			1993			1994	
	1991	1992	1993	Feb	Nov	Dec	Jan	Feb P
Monthly data seasonally adjusted								
Industrial production (1987=100)	104.1	106.5	110.9	109.9	112.8	114.0	114.6	115.1
Leading economic indicators (1987=100)	97.1	98.1	98.7	99.1	99.5	100.1	100.5	100.4
Civilian employment (mil. persons) 2/	116.9	117.6	119.3	118.4	120.3	120.7	122.0	122.3
Civilian unemployment rate (%) 2/	6.6	7.3	6.7	7.0	6.5	6.4	6.7	6.5
Personal income (\$ bil. annual rate)	4,850.9	5,144.9	5,388.3	5,249.1	5,511.2	5,548.1	5,529.3	5,600.6
Money stock-M2 (daily avg.) (\$ bil.) 3/	3,455.3	3,509.0	3,563.1	3,494.2	3,556.2	3,563.1	3,569.9	3,566.6
Three-month Treasury bill rate (%)	5.42	3.45	3.02	2.95	3.12	3.08	3.02	3.21
AAA corporate bond yield (Moody's) (%)	8.77	8.14	7.22	7.71	6.93	6.93	6.92	7.08
Housing starts (1,000) 4/	1,014	1,200	1,288	1,194	1,406	1,612	1,258	1,309
Auto sales at retail, total (mil.)	8.4	8.4	8.7	8.0	9.0	8.8	9.2	—
Business inventory/sales ratio	1.54	1.50	1.46	1.46	1.44	1.42	1.43	—
Sales of all retail stores (\$ bil.) 5/	1,863.0	1,959.1	2,081.6	168.8	179.0	180.9	178.6	181.5
Nondurable goods stores (\$ bil.)	1,209.5	1,251.8	1,297.0	107.4	119.4	109.9	109.2	110.8
Food stores (\$ bil.)	379.3	382.4	392.4	32.8	33.1	33.4	33.3	33.6
Eating & drinking places (\$ bil.)	194.1	200.6	211.0	17.1	17.9	18.0	17.3	18.0
Apparel & accessory stores (\$ bil.)	97.3	104.1	106.1	8.8	9.0	8.9	8.6	8.9

1/ Population estimates based on 1990 census. 2/ Data for 1994 are not directly comparable with data for 1993 and earlier years. 3/ Annual data as of December of the year listed. 4/ Private, including farm. 5/ Annual total. P = preliminary. — = not available.

Information contact: Ann Duncan (202) 219-0313.

Table 3.—World Economic Growth

	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992 E	1993 F	1994 F	Average 1984-93
Percent change in real GDP													
World	2.7	4.3	3.3	2.7	3.1	4.4	3.3	2.2	0.7	1.9	1.6	2.6	3.2
World, less U.S.	2.5	3.6	3.4	2.7	3.1	4.6	3.6	2.7	1.2	1.7	1.1	2.3	3.3
Developed	2.6	4.3	3.2	2.7	3.1	4.4	3.3	2.4	0.9	1.7	1.0	2.1	2.7
Developed, less U.S.	2.1	3.2	3.4	2.7	3.2	4.5	3.6	3.5	1.4	1.1	-0.3	1.3	2.5
United States	3.3	6.0	3.0	2.6	3.0	3.9	2.6	0.8	-0.7	2.6	2.9	3.5	3.0
Canada	3.2	6.4	4.7	3.3	4.1	4.7	2.5	0.4	-1.7	0.7	2.5	3.7	4.1
Japan	2.7	4.3	5.0	2.7	4.1	6.2	4.7	5.2	4.4	1.3	-0.5	0.5	2.3
Western Europe	1.6	2.4	2.5	2.7	2.6	3.7	3.2	2.8	0.2	1.0	-0.5	1.4	2.5
European Union	1.5	2.3	2.4	2.7	2.7	3.9	3.3	2.9	0.4	1.1	-0.3	1.4	2.5
Germany	1.5	2.8	1.9	2.2	1.4	3.7	3.3	2.9	0.6	2.1	-1.3	0.8	2.2
Central Europe	2.7	3.5	2.0	3.0	1.5	2.1	-0.3	-8.7	-13.8	-10.2	1.4	4.3	4.5
Former Soviet Union	4.4	4.1	1.7	3.6	2.8	1.5	0.8	-5.8	-12.7	-17.5	-13.3	-6.8	0.5
Russia	—	2.6	3.4	2.1	5.6	2.5	-2.0	-9.0	-19.0	-11.9	-6.0	0.7	-2.9
Developing	4.0	4.4	3.9	3.4	4.1	4.6	3.8	3.7	3.8	5.4	5.3	5.4	5.4
Asia	8.3	7.7	6.4	6.6	7.8	9.5	5.8	6.3	5.2	7.7	7.0	7.0	6.8
Pacific-Asia	8.9	9.4	6.7	7.3	9.0	9.5	6.1	6.6	6.4	9.0	8.1	7.9	7.3
China	10.1	14.4	12.3	8.2	11.0	10.7	4.3	5.4	6.4	12.8	11.0	10.0	8.2
South Asia	7.0	3.9	5.6	4.9	4.8	9.4	5.1	5.5	1.8	4.0	3.9	4.3	5.5
India	7.4	3.7	5.4	4.8	4.7	10.3	5.4	5.6	1.2	4.2	3.8	4.1	5.5
Latin America	-2.6	3.9	3.3	4.5	3.2	0.6	1.3	-0.1	3.1	2.2	3.3	4.5	4.6
Mexico	-4.2	3.7	2.7	-3.9	1.8	1.2	3.4	4.5	3.6	2.6	0.4	3.0	4.0
Caribbean/Central	0.2	0.5	2.2	2.1	2.8	-0.6	2.1	1.4	0.1	0.2	2.2	2.0	2.2
South America	-2.6	4.1	4.0	7.1	3.5	0.4	0.5	-1.7	3.0	1.9	4.2	5.1	5.0
Brazil	-3.4	5.4	7.9	8.0	3.3	-0.2	3.3	-4.2	1.2	-0.2	4.8	5.6	5.5
Middle East	8.5	0.5	-0.6	-6.9	-2.0	-2.1	2.8	3.2	1.9	7.5	5.6	3.6	3.9
Africa	1.2	1.0	3.0	2.4	0.4	2.7	3.0	1.9	2.1	1.2	2.1	2.4	2.6
North Africa	3.6	2.7	3.1	0.4	-0.1	1.3	2.9	1.8	2.8	1.4	1.6	2.3	2.7
Sub-Saharan	-0.4	-0.1	2.9	3.8	0.8	3.7	3.1	2.0	1.6	1.1	2.3	2.5	2.6
Mid-East & N. Africa	7.1	1.1	0.5	-4.7	-1.4	-1.1	2.8	2.8	2.2	5.7	4.5	3.2	3.6

E = estimate. F = forecast.

Information contact: Alberto Jerardo, (202) 219-0782.

Farm Prices

Table 4.—Indexes of Prices Received & Paid by Farmers, U.S. Average

	Annual			1993				1994		
	1991	1992	1993 P	Mar	Oct	Nov	Dec	Jan	Feb R	Mar P
1977 = 100										
Prices received										
All farm products	146	139	143	141	145	144	145	147	148	148
All crops	129	121	123	116	130	128	133	135	135	132
Food grains	115	139	129	132	130	143	150	149	151	143
Feed grains & hay	117	116	115	110	118	125	133	136	138	136
Feed grains	115	114	110	105	113	121	131	133	136	132
Cotton	108	88	89	93	87	89	94	105	109	110
Tobacco	161	154	154	165	157	162	162	162	168	148
Oil-bearing crops	91	86	95	90	94	98	101	106	105	105
Fruit, all	265	175	174	121	285	183	166	150	149	148
Fresh market 1/	289	179	181	117	317	192	171	152	150	150
Commercial vegetables	135	156	159	153	124	139	168	169	157	147
Fresh market	140	156	166	159	120	141	179	177	161	149
Potatoes & dry beans	141	124	151	149	130	164	156	157	164	181
Livestock & products	161	157	162	166	159	158	156	159	161	163
Meat animals	186	176	183	192	177	173	170	175	179	181
Dairy products	126	135	132	126	135	140	140	141	139	139
Poultry & eggs	124	117	127	130	128	129	127	124	127	132
Prices paid										
Commodities & services,										
interest, taxes, & wage rates	187	189	195	192	196	196	196	197	197	197
Production items	172	173	178	176	181	181	181	182	182	182
Feed	123	123	124	—	127	—	—	138	—	—
Feeder livestock	214	202	218	—	216	—	—	211	—	—
Seed	163	162	169	—	169	—	—	171	—	—
Fertilizer	134	131	128	—	127	—	—	127	—	—
Agricultural chemicals	151	159	165	—	166	—	—	166	—	—
Fuels & energy	203	199	201	—	204	—	—	189	—	—
Farm & motor supplies	157	160	160	—	159	—	—	159	—	—
Autos & trucks	244	258	272	—	276	—	—	278	—	—
Tractors & self-propelled machinery	211	219	227	—	237	—	—	237	—	—
Other machinery	226	233	243	—	248	—	—	248	—	—
Building & fencing	146	150	159	—	160	—	—	160	—	—
Farm services & cash rent	171	172	174	—	174	—	—	175	—	—
Int. payable per acre on farm real estate debt	137	129	123	—	123	—	—	130	—	—
Taxes payable per acre on farm real estate	164	171	180	—	180	—	—	189	—	—
Wage rates (seasonally adjusted)	200	209	217	—	206	—	—	205	—	—
Production items, interest, taxes, & wage rates	175	176	178	—	178	—	—	180	—	—
Ratio, prices received to prices paid (%) 2/	77	74	73	73	74	73	74	75	75	75
Prices received (1910-14=100)	665	636	653	646	662	656	662	672	678	676
Prices paid, etc. (parity index) (1910-14=100)	1,285	1,303	1,340	—	1,347	—	—	1,357	—	—
Parity ratio (1910-14=100) (%)2/	51	49	49	—	49	—	—	48	—	—

1/ Fresh market for noncitrus; fresh market & processing for citrus. 2/ Ratio of index of prices received for all farm products to index of prices paid for commodities & services, interest, taxes, & wage rates. Ratio uses the most recent prices paid index. Prices paid data are quarterly & will be published in January, April, July, & October. R = revised. P = preliminary. — = not available.

Information contact: Ann Duncan (202) 219-0313.

Table 5.—Prices Received by Farmers, U.S. Average

	Annual 1/			1993				1994		
	1991	1992	1993 P	Mar	Oct	Nov	Dec	Jan	Feb R	Mar P
CROPS										
All wheat (\$/bu.)	3.00	3.24	3.20	3.30	3.22	3.47	3.60	3.57	3.58	3.37
Rice, rough (\$/cwt)	7.58	5.89	8.50	5.63	6.10	8.06	8.91	8.98	10.10	9.75
Corn (\$/bu.)	2.37	2.07	2.55	2.10	2.28	2.45	2.67	2.70	2.79	2.72
Sorghum (\$/cwt)	4.02	3.38	4.29	3.38	3.81	4.23	4.54	4.70	4.59	4.41
All hay, baled (\$/ton)	71.20	74.30	81.00	78.90	82.50	83.60	84.20	85.70	86.90	90.80
Soybeans (\$/bu.)	5.58	5.56	6.50	5.65	6.01	6.32	6.64	6.72	6.70	6.76
Cotton, upland (cts./lb.)	56.8	53.7	5/ 53.3	56.3	52.8	53.9	57.1	63.7	66.0	66.4
Potatoes (\$/cwt)	4.96	5.52	6.22	6.06	5.01	6.40	6.12	6.05	6.49	7.24
Lettuce (\$/cwt) 2/	11.40	12.40	16.00	14.30	12.20	10.70	8.93	8.03	11.80	11.20
Tomatoes fresh (\$/cwt) 2/	31.80	35.80	31.60	21.20	20.20	32.30	57.50	41.10	18.80	27.30
Onions (\$/cwt)	12.50	13.00	15.80	17.30	12.00	17.20	24.10	31.70	34.50	20.80
Dry edible beans (\$/cwt)	15.60	19.90	23.50	20.00	22.90	26.30	24.90	26.60	25.40	26.40
Apples for fresh use (cts./lb.)	25.1	19.2	—	14.5	22.4	20.5	19.0	19.1	18.7	16.9
Pears for fresh use (\$/ton)	385.00	378.00	371.00	412.00	391.00	361.00	323.00	280.00	256.00	224.00
Oranges, all uses (\$/box) 3/	6.79	5.50	3.11	2.70	11.87	5.25	3.95	3.91	4.14	4.48
Grapefruit, all uses (\$/box) 3/	5.55	6.23	2.60	1.59	8.13	4.19	4.35	3.20	3.20	2.54
LIVESTOCK										
Beef cattle (\$/cwt)	72.90	71.30	73.30	77.20	69.10	69.30	68.50	70.00	70.20	72.20
Calves (\$/cwt)	99.90	89.40	95.80	98.60	93.80	91.50	92.60	94.00	95.00	97.90
Hogs (\$/cwt)	48.80	42.10	45.40	46.50	46.90	42.50	40.60	43.50	47.90	45.00
Lambs (\$/cwt)	52.50	60.80	64.50	76.00	64.50	65.80	66.00	60.80	60.00	59.70
All milk, sold to plants (\$/cwt)	12.27	13.15	12.83	12.20	13.10	13.60	13.60	13.70	13.50	13.50
Milk, manuf. grade (\$/cwt)	11.05	11.91	11.77	11.10	12.40	12.70	12.50	12.30	12.30	12.40
Broilers (cts./lb.)	31.0	30.8	34.2	32.4	35.1	34.7	33.6	33.4	34.0	35.3
Eggs (cts./doz.) 4/	66.0	56.4	62.9	70.7	60.0	62.6	63.1	61.9	63.7	65.9
Turkeys (cts./lb.)	37.7	37.6	38.9	37.2	43.1	42.9	40.9	36.8	37.1	38.4

1/ Season average price by crop year for crops. Calendar year average of monthly prices for livestock. 2/ Excludes Hawaii. 3/ Equivalent on-tree returns.
 4/ Average of all eggs sold by producers including hatching eggs & eggs sold at retail. 5/ Average for Aug. 1 – Dec. 1. P = preliminary. R = revised.
 — = not available.

Information contact: Ann Duncan (202) 219-0313.

Producer & Consumer Prices

Table 6.—Consumer Price Index for All Urban Consumers, U.S. Average (Not Seasonally Adjusted)

	Annual	1993						1994		
	1993	Mar	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar
		1982-84=100								
Consumer Price Index, all items	144.5	143.6	144.8	145.1	145.7	145.8	145.8	146.2	146.7	147.2
Consumer Price Index, less food	145.1	144.2	145.6	145.1	146.4	146.6	146.4	146.6	147.3	148.0
All food	140.9	140.1	140.8	141.1	141.6	141.9	142.7	143.7	142.9	143.2
Food away from home	143.2	142.4	143.6	143.8	144.0	144.2	144.3	144.5	144.6	144.8
Food at home	140.1	139.4	139.7	140.0	140.8	141.2	142.3	143.8	142.6	142.8
Meats 1/	134.6	133.1	135.6	135.5	135.9	136.3	135.9	136.1	136.0	136.4
Beef & veal	137.1	136.3	137.4	137.0	137.2	138.0	137.7	137.3	136.9	138.0
Pork	131.7	129.0	133.8	134.6	134.6	134.4	133.1	133.9	134.1	134.6
Poultry	136.9	135.7	137.5	138.0	139.2	139.7	141.1	140.5	140.4	140.1
Fish	156.6	157.8	154.1	155.4	157.4	158.9	158.7	163.2	160.9	161.8
Eggs	117.1	120.3	117.4	113.4	114.9	118.0	116.0	118.5	117.4	120.5
Dairy products 2/	129.4	128.8	130.5	129.6	129.5	129.5	130.2	131.6	131.8	131.8
Fats & oils 3/	130.0	130.2	130.1	130.0	130.0	129.2	129.4	131.3	131.5	132.6
Fresh fruit	188.8	184.4	184.7	193.3	197.7	194.4	205.4	207.2	194.8	199.1
Processed fruit	132.3	132.0	132.2	132.4	132.8	133.4	133.7	134.6	133.0	133.3
Fresh vegetables	168.4	173.7	156.1	157.4	157.7	166.1	174.9	181.7	168.1	167.0
Potatoes	154.6	142.4	165.8	156.1	152.1	158.3	165.0	169.4	171.3	179.8
Processed vegetables	130.8	130.2	131.4	130.9	131.7	131.7	132.8	135.8	136.1	135.7
Cereals & bakery products	156.6	154.6	157.5	157.7	158.1	157.9	158.9	160.3	161.3	160.4
Sugar & sweets	133.4	132.8	133.7	133.3	134.1	133.7	133.3	134.9	135.6	135.3
Beverages, nonalcoholic	114.6	114.8	114.1	113.8	115.4	115.4	114.8	116.1	116.0	116.0
Apparel										
Apparel, commodities less footwear	131.9	135.2	130.0	133.0	134.7	134.6	130.3	127.5	130.1	134.5
Footwear	125.9	126.3	123.5	126.2	127.3	124.4	125.8	125.9	125.9	127.0
Tobacco & smoking products	228.4	236.3	227.9	215.1	214.0	214.5	215.5	217.6	217.4	217.7
Beverages, alcoholic	149.6	149.4	149.7	149.9	150.1	150.0	150.3	151.0	151.1	151.4

1/ Beef, veal, lamb, pork, & processed meat. 2/ Includes butter. 3/ Excludes butter.

Information contact: Ann Duncan (202) 219-0313.

Table 7.—Producer Price Indexes, U.S. Average (Not Seasonally Adjusted)

	Annual			1993					1994	
	1991	1992	1993	Feb	Sept	Oct R	Nov	Dec	Jan	Feb
	1982 = 100									
All commodities	116.5	117.2	118.9	118.4	118.7	119.1	118.9	118.4	119.0	119.2
Finished goods 1/	121.7	123.2	124.7	124.5	123.8	124.6	124.4	124.1	124.4	124.8
All foods 2/	122.2	120.9	123.6	122.2	123.4	123.4	125.2	125.9	125.5	125.0
Consumer foods	124.1	123.3	125.7	124.5	125.7	125.4	126.7	127.2	127.1	126.7
Fresh fruit & melons	129.9	84.0	84.2	78.7	92.3	89.2	90.3	93.7	81.7	84.4
Fresh & dried vegetables	103.8	115.0	133.5	136.9	116.7	103.2	144.9	160.1	143.0	112.4
Dried fruit	111.8	114.6	118.2	115.7	117.8	120.7	120.8	121.8	121.2	121.5
Canned fruit & juice	128.6	134.5	126.1	127.5	126.3	125.8	126.7	126.3	126.8	126.6
Frozen fruit & juice	116.3	125.9	110.9	105.8	114.1	114.9	117.6	115.8	116.1	113.5
Fresh veg. excl. potatoes	100.2	116.4	126.4	125.8	117.0	89.5	141.1	167.0	146.3	99.4
Canned veg. & juices	112.9	109.5	110.6	109.8	110.4	111.5	113.1	112.3	113.0	115.1
Frozen vegetables	117.6	116.4	121.0	118.0	122.6	123.2	123.7	125.4	126.0	126.7
Potatoes	125.7	118.4	144.9	119.1	134.0	143.7	197.7	178.8	170.5	165.6
Eggs for fresh use (1991=100)	3/	78.6	86.6	87.9	75.7	85.8	88.5	86.0	82.9	88.3
Bakery products	146.6	152.5	156.6	155.7	157.3	157.9	157.9	157.9	158.4	158.9
Meats	113.5	106.7	110.5	109.7	110.5	108.3	107.4	106.3	106.1	108.4
Beef & veal	112.2	109.5	112.9	114.9	110.7	105.9	107.2	107.3	105.0	105.5
Pork	113.4	98.9	105.4	99.9	109.0	109.7	104.2	101.0	103.7	110.4
Processed poultry	109.9	109.0	111.6	108.4	115.4	115.7	113.7	113.0	112.9	112.9
Fish	149.5	156.1	156.7	167.2	147.7	155.1	154.6	156.2	171.7	155.1
Dairy products	114.6	117.9	118.1	115.4	118.4	119.0	120.3	121.0	120.3	119.9
Processed fruits & vegetables	119.6	120.8	118.3	117.0	118.9	119.5	120.7	120.5	120.9	121.4
Shortening & cooking oil	116.5	115.1	123.0	116.7	124.8	124.2	125.3	131.8	139.2	140.2
Soft drinks	125.5	125.6	126.3	127.9	125.4	125.6	125.5	125.1	127.0	127.6
Consumer finished goods less foods	118.7	120.8	121.7	121.8	120.5	121.2	120.3	119.4	119.8	120.5
Beverages, alcoholic	123.7	126.1	126.0	126.3	125.7	125.9	125.8	125.6	125.8	127.7
Apparel	119.6	122.2	123.2	123.1	123.3	123.3	123.2	122.9	123.0	123.5
Footwear	128.6	132.0	134.4	133.8	134.9	134.7	134.7	135.0	135.3	135.6
Tobacco products	249.7	275.3	260.1	292.2	213.2	213.5	213.5	221.2	225.5	224.9
Intermediate materials 4/	114.4	114.7	116.2	115.6	116.8	116.5	116.2	115.9	116.1	116.6
Materials for food manufacturing	115.3	113.9	115.6	112.8	116.3	116.7	117.6	119.0	119.0	119.2
Flour	96.8	109.5	109.3	110.0	104.2	109.2	111.8	116.7	113.2	113.1
Refined sugar 5/	121.6	119.8	118.3	117.6	118.4	118.7	118.8	118.9	118.4	118.3
Crude vegetable oils	103.0	97.1	110.3	101.3	113.3	112.5	117.9	136.6	141.8	138.8
Crude materials 6/	101.2	100.4	102.4	101.4	101.0	102.8	102.5	100.4	102.2	100.9
Foodstuffs & feedstuffs	105.5	105.1	108.3	106.0	107.7	105.7	109.5	111.5	111.5	112.8
Fruits & vegetables & nuts 7/	114.7	96.9	106.0	105.2	102.3	94.6	114.6	121.4	108.4	97.1
Grains	92.0	97.3	94.4	88.1	92.2	96.4	105.9	116.4	118.0	116.8
Livestock	107.9	104.7	107.0	110.0	105.7	100.0	100.5	99.2	100.7	103.6
Poultry, live	111.2	112.6	122.0	110.4	135.1	126.1	127.2	118.4	110.9	119.6
Fibers, plant & animal	115.1	89.8	91.3	89.5	89.4	92.0	88.8	98.1	107.1	119.0
Fluid milk	89.5	96.1	93.8	89.1	94.0	95.6	97.3	98.7	98.8	97.9
Oilseeds	106.4	107.5	115.9	106.7	118.4	114.3	119.1	127.1	127.4	127.4
Tobacco, leaf	101.1	101.0	99.6	110.0	100.9	102.2	98.9	105.5	105.5	109.4
Sugar, raw cane	113.7	112.1	113.2	109.7	115.3	114.7	114.6	115.4	115.2	114.9

1/ Commodities ready for sale to ultimate consumer. 2/ Includes all raw, intermediate, & processed foods (excludes soft drinks, alcoholic beverages, & manufactured animal feeds). 3/ New index beginning Dec. 1991. 4/ Commodities requiring further processing to become finished goods. 5/ All types & sizes of refined sugar. 6/ Products entering market for the first time that have not been manufactured at that point. 7/ Fresh & dried. R = revised.

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Farm-Retail Price Spreads

Table 8.—Farm-Retail Price Spreads

	Annual			1993					1994	
	1991	1992	1993	Feb	Sept	Oct	Nov	Dec	Jan	Feb
Market basket 1/										
Retail cost (1982-84=100)	137.4	138.4	141.9	140.6	142.2	142.8	143.2	144.6	145.8	144.4
Farm value (1982-84=100)	106.1	103.4	104.9	103.8	104.2	102.2	104.2	105.4	106.4	103.7
Farm-retail spread (1982-84=100)	154.2	157.3	161.9	160.5	162.6	164.7	164.2	165.7	167.1	166.3
Farm value-retail cost (%)	27.0	26.2	25.9	25.8	25.7	25.1	25.5	25.5	25.5	25.2
Meat products										
Retail cost (1982-84=100)	132.5	130.7	134.6	132.1	135.5	135.9	136.3	135.9	136.1	136.0
Farm value (1982-84=100)	110.0	104.5	107.2	108.9	105.4	102.0	101.0	97.4	97.1	101.5
Farm-retail spread (1982-84=100)	155.6	157.5	162.8	155.9	166.4	170.7	172.5	175.4	176.2	171.4
Farm value-retail cost (%)	42.0	40.5	40.3	41.8	39.4	38.0	37.5	36.3	36.1	37.8
Dairy products										
Retail cost (1982-84=100)	125.1	128.5	129.4	128.8	129.6	129.5	129.5	130.2	131.6	131.8
Farm value (1982-84=100)	90.0	95.9	93.0	90.0	91.7	92.2	95.7	97.2	98.4	96.5
Farm-retail spread (1982-84=100)	157.5	158.6	162.9	164.6	164.5	163.9	160.7	160.6	162.3	164.4
Farm value-retail cost (%)	34.5	35.8	34.5	33.5	34.0	34.1	35.4	35.8	35.9	35.1
Poultry										
Retail cost (1982-84=100)	131.5	131.4	136.9	133.1	138.0	139.2	139.7	141.1	140.5	140.4
Farm value (1982-84=100)	102.5	104.0	111.5	103.0	118.5	116.0	114.8	110.9	108.3	110.1
Farm-retail spread (1982-84=100)	164.9	163.0	166.2	167.7	160.5	165.9	168.4	175.9	177.5	175.3
Farm value-retail cost (%)	41.7	42.4	43.6	41.4	46.0	44.6	44.0	42.1	41.3	42.0
Eggs										
Retail cost (1982-84=100)	121.2	108.3	117.1	115.6	113.4	114.9	118.0	116.0	118.5	117.4
Farm value (1982-84=100)	100.9	77.8	88.9	88.3	77.9	84.2	89.5	89.2	86.6	89.9
Farm-retail spread (1982-84=100)	157.6	163.2	167.8	164.6	177.2	170.0	169.1	164.2	175.8	166.8
Farm value-retail cost (%)	53.5	46.1	48.8	49.1	44.1	47.1	48.8	49.4	47.0	49.2
Cereal & bakery products										
Retail cost (1982-84=100)	145.8	151.5	156.6	154.9	157.7	158.1	157.9	158.9	160.3	161.3
Farm value (1982-84=100)	85.3	94.7	91.4	91.2	88.2	93.3	101.2	108.0	106.4	106.1
Farm-retail spread (1982-84=100)	154.3	159.4	165.6	163.8	167.4	167.1	165.8	166.0	167.8	169.0
Farm value-retail cost (%)	7.2	7.7	7.1	7.2	6.8	7.2	7.8	8.3	8.1	8.1
Fresh fruits										
Retail cost (1982-84=100)	200.1	189.6	195.8	191.6	203.7	208.1	204.3	216.6	217.0	198.8
Farm value (1982-84=100)	174.4	122.5	134.8	132.0	152.2	142.8	129.7	128.2	135.5	119.8
Farm-retail spread (1982-84=100)	211.9	220.6	224.0	219.1	227.5	238.2	238.7	257.4	254.6	235.3
Farm value-retail cost (%)	27.5	20.4	21.7	21.8	23.6	21.7	20.1	18.7	19.7	19.0
Fresh vegetables										
Retail costs (1982-84=100)	154.4	157.9	168.4	171.1	157.4	157.7	166.1	174.9	181.7	168.1
Farm value (1982-84=100)	110.8	120.5	128.4	132.5	111.1	97.3	120.6	149.7	168.3	136.3
Farm-retail spread (1982-84=100)	176.8	177.2	189.0	191.0	181.2	188.8	189.5	187.9	188.6	184.5
Farm value-retail cost (%)	24.4	25.9	25.9	26.3	24.0	20.9	24.7	29.1	31.5	27.5
Processed fruits & vegetables										
Retail cost (1982-84=100)	130.2	133.7	131.5	131.9	131.6	132.2	132.5	133.2	135.0	134.2
Farm value (1982-84=100)	120.6	129.0	106.3	106.2	106.5	109.1	109.2	118.7	117.0	115.5
Farm-retail spread (1982-84=100)	133.2	135.2	139.4	139.9	139.4	139.4	139.8	137.7	140.6	140.0
Farm value-retail costs (%)	22.0	22.9	19.2	19.2	19.2	19.6	19.6	21.2	20.6	20.5
Fats & oils										
Retail cost (1982-84=100)	131.7	129.8	130.0	130.7	130.0	130.0	129.2	129.4	131.3	131.5
Farm value (1982-84=100)	98.0	93.2	107.5	99.7	110.1	107.1	118.6	128.9	136.9	126.1
Farm-retail spread (1982-84=100)	144.2	143.3	138.3	142.1	137.3	138.4	133.1	129.6	129.2	133.5
Farm value-retail cost (%)	20.0	19.3	22.2	20.5	22.8	22.2	24.7	26.8	28.0	25.8
	Annual			1993				1994		
	1991	1992	1993	Mar	Oct	Nov	Dec	Jan	Feb	Mar
Beef, Choice										
Retail price 2/ (cts./lb.)	288.3	284.6	293.4	295.5	288.5	291.0	288.2	286.8	284.9	288.3
Wholesale value 3/ (cts.)	182.5	179.6	182.5	191.7	171.6	174.2	170.6	172.4	172.7	176.9
Net farm value 4/ (cts.)	160.2	161.8	164.1	178.7	151.0	152.1	152.3	154.4	155.5	160.6
Farm-retail spread (cts.)	128.1	122.8	129.3	116.8	137.5	138.9	135.9	132.4	129.4	127.7
Wholesale-retail 5/ (cts.)	105.8	105.0	110.9	103.8	116.9	116.8	117.6	114.4	112.2	111.4
Farm-wholesale 6/ (cts.)	22.3	17.8	18.4	13.0	20.6	22.1	18.3	18.0	17.2	16.3
Farm value-retail price (%)	56	57	56	60	52	52	53	54	55	56
Pork										
Retail price 2/ (cts./lb.)	211.9	198.0	197.6	193.9	201.2	202.1	201.1	201.2	199.9	201.4
Wholesale value 3/ (cts.)	108.9	98.9	102.8	102.6	106.5	103.7	102.7	106.4	108.1	105.0
Net farm value 4/ (cts.)	78.4	67.8	72.5	74.6	75.0	68.2	64.1	69.7	76.6	70.2
Farm-retail spread (cts.)	133.5	130.2	125.1	119.3	126.2	133.9	137.0	131.5	123.3	131.2
Wholesale-retail 5/ (cts.)	103.0	99.1	94.8	91.3	94.7	98.4	98.4	94.8	91.8	96.4
Farm-wholesale 6/ (cts.)	30.5	31.1	30.3	28.0	31.5	35.5	38.6	36.7	31.5	34.8
Farm value-retail price (%)	37	34	37	38	37	34	32	35	38	35

1/ Retail costs are based on CPI-U of retail prices for domestically produced farm foods, published monthly by BLS. The farm value is the payment for the quantity of farm equivalent to the retail unit, less allowance for byproduct. Farm values are based on prices at first point of sale & may include marketing charges such as grading & packing for some commodities. The farm-retail spread, the difference between the retail price & the farm value, represents charges for assembling, processing, transporting, distributing. 2/ Weighted average price of retail cuts from pork & choice yield grade 3 beef. Prices from BLS. 3/ Value of wholesale (boxed beef) & wholesale cuts (pork) equivalent to 1 lb. of retail cuts adjusted for transportation costs & byproduct values. 4/ Market value to producer for live animal equivalent to 1 lb. of retail cuts, minus value of byproducts. 5/ Charges for retailing & other marketing services such as wholesaling, & in-city transportation. 6/ Charges for livestock marketing, processing, & transportation.

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Table 9.—Price Indexes of Food Marketing Costs

	Annual			1992	1993				1994
	1991	1992	1993	IV	I	II	III	IV	IP
1967=100*									
Labor—hourly earnings & benefits	409.7	418.8	431.9	422.4	426.9	432.6	432.2	435.7	438.2
Processing	420.4	436.7	448.9	439.9	443.5	450.1	450.1	452.1	455.1
Wholesaling	443.8	458.6	475.2	463.9	469.6	475.7	476.1	479.3	483.4
Retailing	383.9	383.4	395.7	386.5	391.6	396.1	395.0	400.2	401.4
Packaging & containers	371.2	370.1	371.1	371.4	370.8	369.3	368.4	376.1	376.9
Paperboard boxes & containers	320.3	324.8	322.9	324.9	324.2	323.5	322.4	321.4	324.4
Metal cans	470.5	478.1	487.7	477.7	478.0	478.2	477.7	516.9	519.5
Paper bags & related products	410.9	387.8	387.3	393.0	392.5	390.6	385.1	381.0	379.7
Plastic films & bottles	310.7	309.9	307.9	313.2	311.2	305.2	304.9	310.3	308.3
Glass containers	446.0	444.4	446.8	443.1	442.8	444.8	450.3	449.1	449.0
Metal foil	251.6	241.0	238.8	240.9	239.4	238.5	238.5	238.9	236.1
Transportation services	422.6	426.1	425.9	424.0	425.4	426.0	426.2	426.0	430.2
Advertising	460.1	484.0	507.6	490.2	500.2	505.8	510.1	514.4	524.0
Fuel & power	655.7	654.6	671.7	673.9	661.2	676.2	676.9	672.3	657.1
Electric	508.3	514.0	522.3	511.8	506.1	520.9	549.4	513.0	506.5
Petroleum	649.8	639.9	638.9	681.1	645.7	664.0	609.5	636.3	585.4
Natural gas	1,065.0	1,061.1	1,132.9	1,101.8	1,108.4	1,119.5	1,139.0	1,164.7	1,185.7
Communications, water & sewage	261.7	266.9	270.0	268.4	269.0	268.4	270.3	272.2	275.0
Rent	282.7	278.3	273.1	276.7	273.8	274.6	272.3	271.5	271.5
Maintenance & repair	442.7	454.8	465.2	458.6	462.6	466.2	467.4	464.5	467.3
Business services	425.4	441.9	459.9	447.7	451.9	457.9	463.1	466.7	467.3
Supplies	319.3	318.1	321.3	320.1	319.6	321.9	321.6	322.1	319.9
Property taxes & insurance	480.5	496.7	512.9	503.2	507.5	510.9	514.8	518.4	522.8
Interest, short-term	114.5	74.4	64.7	69.8	64.3	63.7	64.8	65.9	71.7
Total marketing cost index	409.3	415.8	425.2	419.1	421.4	425.3	425.6	428.5	430.4

* Indexes measure changes in employee earnings & benefits & in prices of supplies & services used in processing, wholesaling, & retailing U.S. farm foods purchased for at-home consumption. P = preliminary.

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Livestock & Products

Table 10.—U.S. Meat Supply & Use

	Beg. stocks	Produc- tion 1/	Imports	Total supply	Exports	Ending stocks	Consumption		Primary market price 3/
							Total	Per capita 2/	
Million pounds 4/							Pounds		
Beef									
1991	397	22,917	2,406	25,720	1,188	419	24,113	66.8	74.28
1992	419	23,086	2,440	25,945	1,324	360	24,261	66.5	75.36
1993	360	23,049	2,401	25,810	1,275	529	24,006	65.1	76.36
1994 F	529	23,932	2,365	26,826	1,425	475	24,926	66.9	71-77
Pork									
1991	296	15,999	775	17,070	283	388	16,399	50.4	49.69
1992	388	17,234	645	18,267	407	385	17,475	53.1	43.03
1993	385	17,088	740	18,213	435	359	17,419	52.3	46.10
1994 F	359	16,733	760	17,852	410	375	17,067	50.8	44-50
Veal 5/									
1991	6	306	0	312	0	7	305	1.0	99.94
1992	7	310	0	317	0	5	312	1.0	89.38
1993	5	285	0	290	0	4	286	0.9	95.92
1994 F	4	289	0	293	0	5	288	0.9	90-96
Lamb & mutton									
1991	8	363	41	412	10	6	396	1.4	53.21
1992	6	348	50	404	8	8	388	1.4	61.00
1993	8	337	53	398	8	8	381	1.3	65.85
1994 F	8	344	52	404	8	9	387	1.3	57-63
Total red meat									
1991	707	39,585	3,223	43,515	1,481	820	41,214	119.6	---
1992	820	40,978	3,135	44,933	1,739	758	42,436	121.9	---
1993	758	40,759	3,194	44,711	1,718	900	42,092	119.7	---
1994 F	900	41,298	3,177	45,375	1,843	864	42,668	119.9	---
Broilers									
1991	26	19,591	0	19,617	1,261	36	18,320	63.7	54.8
1992	36	20,904	0	20,940	1,489	33	19,418	66.8	52.6
1993	33	22,017	0	22,050	1,966	27	20,057	68.3	55.2
1994 F	27	23,191	0	23,218	2,130	33	21,055	71.0	53-59
Mature chicken									
1991	224	508	0	732	28	274	429	1.7	---
1992	274	520	0	794	41	345	408	1.6	---
1993	345	516	0	861	56	339	466	1.8	---
1994 F	339	522	0	861	60	340	461	1.8	---
Turkeys									
1991	306	4,603	0	4,909	103	264	4,541	18.0	61.3
1992	264	4,777	0	5,041	171	272	4,599	18.0	60.2
1993	272	4,795	0	5,067	212	249	4,605	17.8	62.6
1994 F	249	4,940	0	5,189	200	265	4,724	18.1	59-65
Total poultry									
1991	557	24,701	0	25,258	1,392	575	23,291	83.4	---
1992	575	26,201	0	26,775	1,701	650	24,425	86.4	---
1993	650	27,328	0	27,978	2,234	615	25,128	87.9	---
1994 F	615	28,654	0	29,269	2,390	638	26,241	90.8	---
Red meat & poultry									
1991	1,264	64,286	3,223	68,772	2,873	1,395	64,504	202.9	---
1992	1,395	67,179	3,135	71,708	3,440	1,408	66,861	208.3	---
1993	1,408	68,087	3,194	72,688	3,953	1,515	67,221	207.6	---
1994 F	1,515	69,952	3,177	74,644	4,233	1,502	68,909	210.7	---

1/ Total including farm production for red meats & federally inspected plus nonfederally inspected for poultry. 2/ Retail weight basis. (The beef carcass-to-retail conversion factor was 70.5). 3/ Dollars per cwt for red meat; cents per pound for poultry. Beef: Medium # 1, Nebraska Direct 1,100-1,300 lb.; pork: barrows & gilts, Iowa, Southern Minnesota; veal: farm price of calves; lamb & mutton: Choice slaughter lambs, San Angelo; broilers: wholesale 12-city average; turkeys; wholesale NY 8-16 lb. young hens. 4/ Carcass weight for red meats & certified ready-to-cook for poultry. 5/ Beginning 1989 veal trade no longer reported separately. F = forecast. — = not available.

Information contacts: Polly Cochran or Maxine Davis (202) 219-0767.

Table 11.—U.S. Egg Supply & Use

	Beg. stocks	Pro- duc- tion	Im- ports	Total supply	Ex- ports	Hatch- ing use	Ending stocks	Consumption		Wholesale price*
								Total	Per capita	
									No.	
Million dozen										
1987	10.4	5,868.2	5.6	5,884.2	111.2	599.1	14.4	5,159.5	254.9	61.6
1988	14.4	5,784.2	5.3	5,803.9	141.8	605.9	15.2	5,041.0	246.9	62.1
1989	15.2	5,598.2	25.2	5,638.5	91.6	643.9	10.7	4,892.4	237.3	81.9
1990	10.7	5,665.6	9.1	5,685.3	100.5	678.5	11.6	4,894.7	235.0	82.2
1991	11.6	5,779.3	2.3	5,793.3	154.3	708.1	13.0	4,917.9	233.5	77.5
1992	13.0	5,884.8	4.3	5,902.1	157.0	728.4	13.5	5,003.1	235.0	65.4
1993 P	13.5	5,960.2	4.7	5,978.3	158.9	766.9	10.7	5,041.8	234.3	72.5
1994 F	10.7	6,035.0	4.5	6,050.2	160.0	800.0	12.0	5,078.2	233.6	67-73

* Cartoned grade A large eggs, New York. F = forecast. P = preliminary.

Information contact: Maxine Davis (202) 219-0767.

Table 12.—U.S. Milk Supply & Use^{1/}

Production	Farm use	Commercial		Im-ports	Total commercial supply	CCC net re-movals	Commercial		All milk price 1/	CCC net removals		
		Farm market-ings	Beg. stock				Ending stocks	Disap-pear-ance		Skim solids basis	Total solids basis 2/	
		Billion pounds (milkfat basis)								\$/cwt	Billion pounds	
1986	143.1	2.4	140.7	4.5	2.7	147.9	10.8	4.1	133.0	12.51	14.3	12.9
1987	142.7	2.3	140.5	4.1	2.5	147.1	6.8	4.6	135.7	12.54	9.3	8.3
1988	145.2	2.2	142.9	4.6	2.4	149.9	9.1	4.3	136.5	12.26	5.5	6.9
1989	144.2	2.1	142.2	4.3	2.5	149.0	9.4	4.1	135.4	13.56	0.4	4.0
1990	148.3	2.0	146.3	4.1	2.7	153.1	9.0	5.1	138.9	13.68	1.6	4.6
1991	148.5	2.0	146.5	5.1	2.6	154.3	10.4	4.5	139.4	12.24	3.9	6.5
1992	151.6	1.9	149.7	4.5	2.5	156.7	10.0	4.7	142.1	13.09	2.0	5.4
1993	151.0	1.9	149.0	4.7	2.8	156.5	6.7	4.6	145.2	12.83	4.2	5.2
1994 F	151.6	1.9	149.7	4.6	2.6	156.9	4.3	4.6	148.0	13.00	3.7	3.9

1/ Delivered to plants & dealers; does not reflect deductions. 2/ Arbitrarily weighted average of milkfat basis (40 percent) & skim solids basis (60 percent). F = forecast.

Information contact: Jim Miller (202) 219-0770.

Table 13.—Poultry & Eggs

	Annual			1993					1994	
	1991	1992	1993	Feb	Sept	Oct	Nov	Dec	Jan	Feb
Broilers										
Federally inspected slaughter, certified (mil. lb.)	19,727.7	21,052.4	22,178.1	1,659.6	1,914.9	1,872.4	1,810.2	1,877.4	1,885.5	1,749.7
Wholesale price, 12-city (cts./lb.)	52.0	52.6	55.2	53.0	57.6	55.7	55.8	53.2	52.7	54.6
Price of grower feed (\$/ton)	208	208	209	205	203	219	217	217	223	227
Broiler-feed price ratio 1/	3.0	3.1	3.3	3.1	3.6	3.2	3.2	3.1	3.0	3.0
Stocks beginning of period (mil. lb.)	26.1	36.1	32.8	31.6	33.3	36.2	32.7	28.8	26.9	23.4
Broiler-type chicks hatched (mil.) 2/	6,616.5	6,830.9	7,218.3	547.7	582.6	584.0	574.1	623.3	617.7	557.8
Turkeys										
Federally inspected slaughter, certified (mil. lb.)	4,651.9	4,828.9	4,847.7	322.7	436.0	451.4	461.8	375.3	347.3	341.7
Wholesale price, Eastern U.S., 8-16 lb. young hens (cts./lb.)	61.3	60.2	62.6	56.8	66.7	71.3	71.8	68.2	60.1	59.3
Price of turkey grower feed (\$/ton)	230	242	247	240	245	254	252	248	254	258
Turkey-feed price ratio 1/	3.3	3.1	3.2	2.9	3.3	3.4	3.4	3.3	2.9	2.9
Stocks beginning of period (mil. lb.)	306.4	264.1	271.7	314.7	678.6	713.8	683.6	290.6	249.1	279.8
Poults placed in U.S. (mil.)	308.1	307.8	308.9	25.3	21.3	21.0	23.8	25.3	25.4	25.1
Eggs										
Farm production (mil.)	69,352	70,618	71,522	5,432	5,876	6,144	6,037	6,243	6,137	5,559
Average number of layers (mil.)	275	278	283	282	283	285	287	288	288	288
Rate of lay (eggs per layer on farms)	252.4	253.9	252.6	19.2	20.7	21.6	21.1	21.7	21.3	19.3
Cartoned price, New York, grade A large (cts./doz.) 3/	77.5	65.4	72.5	69.9	67.2	70.9	71.5	72.2	68.0	72.1
Price of laying feed (\$/ton)	192	199	202	198	200	207	209	207	217	220
Egg-feed price ratio 1/	6.8	5.7	6.2	6.2	5.6	5.8	6.0	6.1	5.7	5.8
Stocks, first of month										
Shell (mil. doz.)	0.45	0.63	0.45	0.36	0.18	0.45	0.39	0.18	0.30	0.21
Frozen (mil. doz.)	11.2	12.3	13.0	12.7	13.8	10.9	10.7	10.3	10.4	11.2
Replacement chicks hatched (mil.)	420	386	406	34.0	31.8	31.6	30.1	30.4	32.8	31.1

1/ Pounds of feed equal in value to 1 dozen eggs or 1 lb. of broiler or turkey liveweight. 2/ Placement of broiler chicks is currently reported for 15 States only; henceforth, hatch of broiler-type chicks will be used as a substitute. 3/ Price of cartoned eggs to volume buyers for delivery to retailers.

Information contact: Maxine Davis (202) 219-0767.

Table 14.—Dairy

	Annual			1993					1994	
	1991	1992	1993	Feb	Sept	Oct	Nov	Dec	Jan	Feb
Milk prices, Minnesota-Wisconsin, 3.5% fat (\$/cwt) 1/	11.05	11.88	11.80	10.74	11.90	12.46	12.75	12.51	12.41	12.41
Wholesale prices										
Butter, grade A Chi. (cts./lb.)	99.3	82.5	74.4	75.2	74.3	74.2	73.6	69.7	64.0	64.0
Am. cheese, Wis. assembly pt. (cts./lb.) 2/	124.4	131.9	131.5	118.6	137.4	138.9	138.7	133.7	132.2	134.2
Nonfat dry milk (cts./lb.) 2/	94.0	107.1	112.0	113.8	109.2	110.8	112.6	112.7	109.8	109.9
USDA net removals 3/										
Total milk equiv. (mil. lb.) 4/	10,426.0	9,936.2	6,751.7	1,515.9	-507.6	-42.1	-162.0	518.1	1,185.4	1,015.5
Butter (mil. lb.)	442.9	439.5	292.3	66.5	-24.3	-2.6	-9.1	22.8	53.4	46.2
Am. cheese (mil. lb.)	76.9	14.4	8.3	2.7	0.4	0.2	0.2	0.2	0.1	0.2
Nonfat dry milk (mil. lb.)	269.5	136.7	330.1	34.9	20.7	13.1	56.1	25.7	16.6	11.7
Milk										
Milk prod. 21 States (mil. lb.)	125,671	128,223	127,383	9,908	10,138	10,331	9,994	10,461	10,637	9,802
Milk per cow (lb.)	14,977	15,544	15,680	1,209	1,253	1,280	1,239	1,299	1,323	1,222
Number of milk cows (1,000)	8,391	8,249	8,124	8,193	8,090	8,069	8,065	8,054	8,042	8,018
U.S. milk production (mil. lb.)	148,477	151,647	150,954	7/ 11,756	7/ 11,978	7/ 12,272	7/ 11,872	7/ 12,427	7/ 12,703	7/ 11,706
Stock, beginning										
Total (mil. lb.)	13,359	15,841	14,215	15,273	16,050	13,984	11,936	10,438	9,570	10,238
Commercial (mil. lb.)	5,146	4,461	4,688	4,840	5,277	5,038	4,760	4,579	4,550	5,090
Government (mil. lb.)	8,213	11,379	9,526	10,434	10,774	8,947	7,175	5,860	5,020	5,148
Imports, total (mil. lb.)	2,625	2,524	2,807	135	224	293	300	335	209	---
Commercial disappearance (mil. lb.)	139,343	142,087	145,230	10,478	12,792	12,722	12,358	12,110	10,942	---
Butter										
Production (mil. lb.)	1,335.8	1,365.2	1,318.6	138.9	80.4	92.1	95.7	118.2	131.8	119.6
Stocks, beginning (mil. lb.)	416.1	539.4	447.7	489.1	473.3	395.4	341.1	276.3	234.7	251.0
Commercial disappearance (mil. lb.)	903.5	944.2	1,040.5	77.0	107.3	94.3	107.3	98.2	69.1	---
American cheese										
Production (mil. lb.)	2,768.9	2,936.6	2,924.8	222.9	213.5	239.0	223.7	246.1	247.3	221.3
Stocks, beginning (mil. lb.)	347.4	318.7	346.7	352.1	396.7	389.8	368.8	362.5	358.7	381.6
Commercial disappearance (mil. lb.)	2,756.7	2,902.7	2,913.0	237.1	219.7	260.8	232.2	250.4	224.3	---
Other cheese										
Production (mil. lb.)	3,250.0	3,551.7	3,540.1	266.0	303.0	317.1	315.6	315.3	291.2	286.2
Stocks, beginning (mil. lb.)	110.6	97.5	120.9	129.3	122.3	111.3	104.0	100.5	107.0	115.5
Commercial disappearance (mil. lb.)	3,539.2	3,795.4	3,853.5	283.8	339.2	355.9	351.5	349.4	302.2	---
Nonfat dry milk										
Production (mil. lb.)	877.5	872.1	926.5	83.6	51.1	56.3	56.0	91.2	89.2	85.4
Stocks, beginning (mil. lb.)	161.9	214.8	81.2	72.4	133.8	100.0	75.9	66.4	89.6	86.6
Commercial disappearance (mil. lb.)	662.7	720.6	594.9	48.7	68.4	71.6	11.3	41.0	73.5	---
Frozen dessert										
Production (mil. gal.) 5/	1,203.1	1,196.8	1,177.6	81.7	100.0	85.0	75.8	77.6	76.7	86.2

1/ Manufacturing grade milk. 2/ Prices paid f.o.b. Central States production area. 3/ Includes products exported through the Dairy Export Incentive Program (DEIP). 4/ Milk equivalent; fat basis. 5/ Hard ice cream, ice milk, & hard sherbet. 6/ Based on average milk price after adjustment for price support deductions. 7/ Estimated. --- = not available. P = preliminary.

Information contact: LaVerne T. Williams (202) 219-0770.

Table 15.—Wool

	Annual			1993					1994	
	1991	1992	1993	IV	I	II	III	IV	I	P
U.S. wool price, (cts./lb.) 1/	199	204	137	176	146	134	136	132	153	
Imported wool price, (cts./lb.) 2/	187	210	142	189	150	137	128	150	171	
U.S. mill consumption, scoured										
Apparel wool (1,000 lb.)	137,187	136,143	139,941	31,066	35,503	35,462	35,021	33,955	---	
Carpet wool (1,000 lb.)	14,352	14,695	15,665	3,378	4,511	4,341	2,648	4,165	---	

1/ Wool price delivered at U.S. mills, clean basis, Graded Territory 64's (20.60-22.04 microns) staple 2-3/4" & up. 2/ Wool price, Charleston, SC warehouse, clean basis, Australian 60/62's, type 64A (24 micron). Duty since 1982 has been 10.0 cents. --- = not available. P = preliminary.

Information contact: John Lawler (202) 219-0840.

Table 16.—Meat Animals

	Annual			1993					1994	
	1991	1992	1993	Feb	Sept	Oct	Nov	Dec	Jan	Feb
Cattle on feed (7 States)										
Number on feed (1,000 head) 1/	8,992	8,397	9,073	9,050	7,734	8,184	9,016	9,307	9,279	9,142
Placed on feed (1,000 head)	19,704	20,498	102,014	1,262	2,158	2,474	1,858	1,499	1,543	1,346
Marketings (1,000 head)	19,071	18,623	18,988	1,441	1,642	1,566	1,459	1,451	1,609	1,501
Other disappearance (1,000 head)	1,233	1,199	1,199	110	66	76	108	76	71	76
Market prices (\$/cwt)										
Slaughter Cattle										
Choice steers, 1,000–1,300 lb.										
Texas	74.21	75.36	76.36	80.34	73.11	71.14	71.54	71.00	72.01	72.44
Neb. Direct	74.68	75.71	77.02	80.91	73.46	72.13	73.23	72.42	72.88	73.03
Boning utility cows, Sioux Falls	50.66	44.84	47.52	47.25	47.97	46.00	43.12	42.38	42.54	44.06
Feeder steers										
Medium no. 1, Oklahoma City										
600–650 lb.	---	86.47	91.72	90.13	91.60	87.69	86.41	87.42	86.88	88.59
750–800 lb.	---	81.76	86.45	85.35	87.03	85.19	85.28	85.33	83.20	81.91
Slaughter hogs										
Barrows & gilts, 230–250 lb.										
Iowa, S. Minn.	49.69	43.03	46.10	44.81	48.80	47.54	43.37	40.88	44.26	48.50
6 markets	48.88	42.31	45.38	44.28	48.19	46.99	42.58	40.14	43.73	47.87
Feeder pigs										
S. Mo. 40–50 lb. (per head)	44.52	31.71	40.66	48.17	39.78	42.22	34.38	32.60	34.67	45.63
Slaughter sheep & lambs										
Lambs, Choice, San Angelo	53.21	61.00	65.85	73.38	66.08	63.75	65.69	68.44	56.00	62.31
Ewes, Good, San Angelo	31.98	35.24	37.46	43.44	34.94	30.82	34.69	39.06	41.55	44.88
Feeder lambs										
Choice, San Angelo	53.29	62.21	69.32	76.09	68.75	69.96	71.81	72.00	69.85	74.00
Wholesale meat prices, Midwest										
Boxed beef cut-out value										
Choice, 700–800 lb.	117.24	116.02	117.71	121.82	112.10	108.35	110.17	108.06	110.08	110.28
Select, 700–800 lb.	112.73	111.66	113.53	119.73	109.59	104.85	106.21	104.34	107.13	107.93
Canner & cutter cow beef	99.42	93.85	95.39	97.23	94.72	90.02	90.22	89.50	91.51	92.91
Pork cutout, No. 2	67.02	58.37	62.19	58.96	66.11	64.87	61.07	56.98	59.75	64.43
Pork loins, 14–18 lb.	108.39	101.41	107.47	100.05	116.74	111.85	98.68	92.33	103.90	110.75
Pork bellies, 12–14 lb.	47.79	30.39	41.62	33.22	43.82	47.25	47.21	46.21	50.63	51.66
Hams, skinned, 20–26 lb.	73.55	66.67	66.90	68.38	76.06	73.68	66.14	57.45	59.52	67.60
All fresh beef retail price	271.05	266.79	273.43	272.18	271.74	273.50	273.58	273.55	269.29	269.88
Commercial slaughter (1,000 head) 2/										
Cattle	32,689	32,874	33,324	2,467	2,869	2,798	2,698	2,775	2,744	2,558
Steers	16,728	17,138	17,222	1,264	1,477	1,403	1,316	1,411	1,402	1,299
Heifers	9,725	9,236	9,358	690	816	805	760	768	785	743
Cows	5,626	5,845	6,089	466	517	531	567	545	510	470
Bulls & stags	614	653	659	46	60	59	56	51	47	46
Calves	1,436	1,371	1,195	99	97	97	105	106	102	96
Sheep & lambs	5,721	5,496	5,182	395	426	406	418	443	395	419
Hogs	88,169	94,889	93,068	7,088	7,947	8,038	8,139	8,397	7,467	6,949
Barrows & gilts	83,668	89,964	88,387	6,750	7,522	7,653	7,756	7,992	7,101	6,596
Commercial production (mil. lb.)										
Beef	22,800	22,968	22,942	1,677	2,027	1,980	1,891	1,948	1,942	1,801
Veal	296	299	267	21	22	22	23	24	23	22
Lamb & mutton	358	343	329	25	27	25	26	28	25	27
Pork	15,948	17,184	17,030	1,289	1,440	1,472	1,509	1,554	1,377	1,275

	Annual			1992	1993				1994	
	1991	1992	1993	IV	I	II	III	IV	I	II
Cattle on feed (13 States)										
Number on feed (1,000 head) 1/	10,827	10,135	10,884	8,920	10,884	10,452	9,493	9,651	11,095	---
Placed on feed (1,000 head)	23,208	24,241	24,011	7,458	5,321	5,314	6,341	7,035	---	---
Marketings (1,000 head)	22,383	22,056	22,316	5,174	5,314	5,833	5,893	5,276	---	---
Other disappearance (1,000 head)	1,517	1,436	1,484	320	439	460	270	315	---	---
Hogs & pigs (10 States) 3/										
Inventory (1,000 head) 1/	42,900	45,735	46,240	48,270	46,240	45,080	46,420	46,920	45,060	44,240
Breeding (1,000 head) 1/	5,257	5,610	5,515	5,735	5,515	5,470	5,630	5,560	5,450	5,455
Market (1,000 head) 1/	37,643	40,125	40,725	42,535	40,725	39,610	40,790	41,360	39,610	38,785
Farrowings (1,000 head)	9,516	9,695	9,292	2,373	2,210	2,521	2,332	2,229	2,221	*2,352
Pig crop (1,000 head)	75,330	78,520	75,355	19,151	18,093	20,465	18,849	17,948	17,954	---

1/ Beginning of period. 2/ Classes estimated. 3/ Quarters are Dec. of preceding year–Feb. (I), Mar.–May (II), June–Aug. (III), & Sept.–Nov. (IV). --- = not available.
 * = Intentions.

Information contact: Polly Cochran (202) 219-0767.

Crops & Products

Table 17.—Supply & Utilization^{1,2}

	Area				Production	Total supply 4/	Feed and resid- ual	Other domes- tic use	Ex- ports	Total use	Ending stocks	Farm price 5/
	Set aside 3/	Planted	Harves- ted	Yield								
	Mil. acres		Bu./acre					Mil. bu.				\$/bu.
Wheat												
1988/89	22.5	65.5	53.2	34.1	1,812	3,096	150	829	1,415	2,394	702	3.72
1989/90	9.6	76.6	62.2	32.7	2,037	2,762	140	853	1,232	2,225	536	3.72
1990/91	7.5	77.2	69.3	39.5	2,736	3,309	496	879	1,068	2,443	866	2.61
1991/92*	15.9	69.9	57.7	34.3	1,981	2,888	250	887	1,280	2,416	472	3.00
1992/93*	7.3	72.3	62.4	39.4	2,459	3,001	191	927	1,354	2,472	529	3.24
1993/94*	5.3	72.2	62.6	38.3	2,402	3,026	300	937	1,225	2,462	564	3.15-3.25
Rice												
	Mil. acres		Lb./acre					Mil. cwt (rough equiv.)				\$/cwt
1988/89	1.09	2.93	2.90	5,514	159.9	195.1	—	6/ 82.4	85.9	168.3	26.7	6.83
1989/90	1.18	2.73	2.69	5,749	154.5	185.6	—	6/ 82.0	77.2	159.2	26.4	7.35
1990/91	1.02	2.90	2.82	5,529	156.1	187.2	—	6/ 91.7	70.9	162.7	24.6	6.70
1991/92*	0.9	2.88	2.78	5,674	157.5	187.3	—	6/ 93.5	66.4	159.9	27.4	7.58
1992/93*	0.4	3.18	3.13	5,736	179.7	213.2	—	6/ 96.7	77.0	173.7	39.4	5.89
1993/94*	0.7	2.92	2.83	5,510	156.1	202.6	—	6/ 98.6	81.0	179.6	23.0	8.25-8.75
Corn												
	Mil. acres		Bu./acre					Mil. bu.				\$/bu.
1988/89	20.5	67.7	58.3	84.6	4,929	9,191	3,941	1,293	2,026	7,260	1,930	2.54
1989/90	10.8	72.2	64.7	116.3	7,525	9,458	4,389	1,356	2,368	8,113	1,344	2.36
1990/91	10.7	74.2	67.0	118.5	7,934	9,282	4,663	1,373	1,725	7,761	1,521	2.28
1991/92*	7.4	76.0	68.8	108.6	7,475	9,016	4,878	1,454	1,584	7,916	1,100	2.37
1992/93*	5.2	79.3	72.2	131.4	9,482	10,589	5,301	1,511	1,663	8,476	2,113	2.07
1993/94*	10.4	73.3	63.0	100.7	6,344	8,477	4,800	1,600	1,250	7,650	827	2.50-2.60
Sorghum												
	Mil. acres		Bu./acre					Mil. bu.				\$/bu.
1988/89	3.9	10.3	9.0	63.8	577	1,239	466	22	311	800	440	2.27
1989/90	3.3	12.6	11.1	55.4	615	1,055	517	15	303	835	220	2.10
1990/91	3.3	10.5	9.1	63.1	573	793	410	9	232	651	143	2.12
1991/92*	2.4	11.1	9.9	59.3	585	727	374	9	292	674	53	2.25
1992/93*	2.0	13.3	12.2	72.8	884	937	478	8	277	762	175	1.89
1993/94*	2.2	10.5	9.5	59.9	568	743	475	8	175	658	85	2.35-2.45
Barley												
	Mil. acres		Bu./acre					Mil. bu.				\$/bu.
1988/89	2.8	9.8	7.6	38.0	290	622	171	175	79	425	196	2.80
1989/90	2.3	9.1	8.3	48.6	404	614	193	175	84	453	161	2.42
1990/91	2.9	8.2	7.5	56.1	422	596	205	176	81	461	135	2.14
1991/92*	2.1	8.9	8.4	55.2	464	624	225	176	94	496	129	2.10
1992/93*	2.3	7.8	7.3	62.5	458	598	195	172	80	447	151	2.04
1993/94*	2.2	7.8	6.8	58.9	400	606	250	170	65	485	121	1.95-2.00
Oats												
	Mil. acres		Bu./acre					Mil. bu.				\$/bu.
1988/89	0.3	13.9	5.5	39.3	218	392	194	100	1	294	98	2.61
1989/90	0.3	12.1	6.9	54.3	374	538	266	115	1	381	157	1.49
1990/91	0.2	10.4	5.9	60.1	358	578	286	120	1	407	171	1.14
1991/92*	0.5	8.7	4.8	50.7	243	489	235	125	2	362	128	1.21
1992/93*	0.6	8.0	4.5	65.6	295	477	233	125	6	364	113	1.32
1993/94*	0.8	7.9	3.8	54.4	206	419	180	125	4	309	110	1.35-1.40
Soybeans												
	Mil. acres		Bu./acre					Mil. bu.				\$/bu.
1988/89	0	58.8	57.4	27.0	1,549	1,855	7/ 88	1,058	527	1,673	182	7.42
1989/90	0	60.8	59.5	32.3	1,924	2,109	7/ 101	1,146	623	1,870	239	5.69
1990/91	0	57.8	56.5	34.1	1,926	2,168	7/ 95	1,187	557	1,839	329	5.74
1991/92*	0	59.2	58.0	34.2	1,987	2,319	7/ 103	1,254	684	2,041	278	5.58
1992/93*	0	59.1	58.2	37.6	2,188	2,468	7/ 127	1,279	770	2,176	292	5.56
1993/94*	0	59.4	56.4	32.0	1,809	2,106	7/ 106	1,250	590	1,946	160	6.40-6.50
Soybean oil												
								Mil. lbs.				8/ Cts./lb.
1988/89	—	—	—	—	11,737	13,967	—	10,591	1,661	12,252	1,715	21.10
1989/90	—	—	—	—	13,004	14,741	—	12,083	1,353	13,436	1,305	22.30
1990/91	—	—	—	—	13,408	14,730	—	12,164	780	12,944	1,786	21.00
1991/92*	—	—	—	—	14,345	16,132	—	12,245	1,648	13,893	2,239	19.10
1992/93*	—	—	—	—	13,778	16,027	—	13,053	1,419	14,472	1,555	21.40
1993/94*	—	—	—	—	13,565	15,175	—	13,150	1,100	14,250	925	27.0-29.0
Soybean meal												
								1,000 tons				9/ \$/ton
1988/89	—	—	—	—	24,943	25,100	—	19,657	5,270	24,927	173	252.40
1989/90	—	—	—	—	27,719	27,900	—	22,263	5,319	27,582	318	186.48
1990/91	—	—	—	—	28,325	28,688	—	22,934	5,469	28,403	285	181.40
1991/92*	—	—	—	—	29,831	30,183	—	23,008	6,945	29,953	230	189.20
1992/93*	—	—	—	—	30,364	30,687	—	24,251	6,232	30,483	204	193.75
1993/94*	—	—	—	—	29,571	29,875	—	24,700	4,900	29,600	275	190-200

See footnotes at end of table.

Table 17.—Supply & Utilization, continued

	Area			Yield	Production	Total supply 4/	Feed and residual	Other domestic use	Ex- ports	Total use	Ending Stocks	Farm price 5/
	Set Aside 3/	Planted	Harves- ted									
	Mil. acres		Lb./acre		Mil. bales							Cts./lb.
Cotton 10/												
1988/89	2.2	12.5	11.9	619	15.4	21.2	—	7.8	6.1	13.9	7.1	56.60
1989/90	3.5	10.6	9.5	614	12.2	19.3	—	8.8	7.7	16.5	3.0	66.20
1990/91	2.0	12.3	11.7	634	15.5	18.5	—	8.7	7.8	16.5	2.3	67.10
1991/92*	1.2	14.1	13.0	652	17.6	20.0	—	9.6	6.6	16.3	3.7	58.10
1992/93*	1.7	13.2	11.1	699	16.2	19.9	—	10.3	5.2	15.5	4.7	54.90
1993/94*	1.4	13.4	12.8	607	16.2	20.8	—	10.2	6.7	16.9	4.0	11/ 58.50

* April 12, 1994 Supply & Demand Estimates. 1/ Marketing year beginning June 1 for wheat, barley, & oats, August 1 for cotton & rice, September 1 for soybeans, corn, & sorghum, October 1 for soybean meal & soybean oil. 2/ Conversion factors: Hectare (ha.) = 2.471 acres, 1 metric ton = 2204.622 pounds, 36.7437 bushels of wheat or soybeans, 39.3679 bushels of corn or sorghum, 45.9296 bushels of barley, 68.8944 bushels of oats, 22.046 cwt of rice, & 4.59 480-pound bales of cotton. 3/ Includes diversion, acreage reduction, 50-92, & 0-92 programs. 0/92 & 50/92 set-aside includes idled acreage & acreage planted to minor oilseeds, sesame, and crambe. 4/ Includes imports. 5/ Marketing-year weighted average price received by farmers. Does not include an allowance for loans outstanding & Government purchases. 6/ Residual included in domestic use. 7/ Includes seed. 8/ Simple average of crude soybean oil, Decatur. 9/ Simple average of 48 percent, Decatur. 10/ Upland & extra long staple. Stocks estimates based on Census Bureau data, resulting in an unaccounted difference between supply & use estimates & changes in ending stocks. 11/ Weighted average for August 1–March 31; not a projection for the marketing year. — = not available or not applicable.

Note: Set-aside data for 1993 are from June 15 sign-up report.

Information contacts: Wheat, rice & feed grains, Jenny Gonzales (202) 219-0840; Soybeans, soybean products & cotton, Mae Dean Johnson (202) 219-0840.

Table 18.—Cash Prices, Selected U.S. Commodities

	Marketing year 1/				1993				1994	
	1989/90	1990/91	1991/92	1992/93	Feb	Oct	Nov	Dec	Jan	Feb
Wheat, No. 1 HRW, Kansas City (\$/bu.) 2/	4.22	2.94	3.77	3.67	3.75	3.52	3.39	4.15	4.00	3.80
Wheat, DNS, Minneapolis (\$/bu.) 3/	4.16	3.06	3.82	3.91	3.87	5.17	5.50	5.45	5.32	5.29
Rice, S.W. La. (\$/cwt) 4/	15.55	15.25	16.50	13.30	13.40	15.20	23.75	26.25	26.25	25.40
Corn, no. 2 yellow, 30 day, Chicago (\$/bu.)	2.54	2.41	2.52	2.22	2.14	2.43	2.77	2.96	3.02	2.99
Sorghum, no. 2 yellow, Kansas City (\$/cwt)	4.21	4.08	4.36	3.74	3.66	4.03	4.60	4.91	4.93	4.81
Barley, feed, Duluth (\$/bu.) 5/	2.20	2.13	2.17	2.11	2.08	2.01	2.16	2.14	2.15	2.16
Barley, malting, Minneapolis (\$/bu.)	3.28	2.42	2.38	2.37	2.32	2.26	2.48	2.57	2.55	2.63
U.S. price, SLM, 1-1/16 in. (cts./lb.) 6/	69.8	74.8	56.7	54.1	55.4	54.6	55.6	60.3	66.5	72.7
Northern Europe prices index (cts./lb.) 7/	82.3	82.9	62.9	56.9	60.8	54.7	55.1	59.8	69.3	80.5
U.S. M 1-3/32 in. (cts./lb.) 8/	83.6	88.2	66.3	62.5	66.1	56.9	58.6	64.6	73.2	82.5
Soybeans, no. 1 yellow, 30 day, Chicago (\$/bu.)	5.86	5.76	5.75	5.96	5.68	6.06	6.55	6.84	6.92	6.77
Soybean oil, crude, Decatur (cts./lb.)	22.30	21.00	19.10	21.40	20.72	22.98	24.22	26.75	29.39	28.73
Soybean meal, 48% protein, Decatur (\$/ton) 9/	186.50	181.40	189.20	193.75	179.87	194.50	209.40	206.00	198.30	198.37

1/ Beginning June 1 for wheat & barley; Aug. 1 for rice & cotton; Sept. 1 for corn, sorghum & soybeans; Oct. 1 for soybean meal & oil. 2/ Ordinary protein. 3/ 14% protein. 4/ Long grain, milled basis. 5/ Beginning Mar. 1987 reporting point changed from Minneapolis to Duluth. 6/ Average spot market. 7/ Liverpool Cotlook "A" Index; average of five lowest prices of 13 selected growths. 8/ Memphis territory growths. 9/ Note change to 48% protein.

Information contacts: Wheat, rice, & feed grains, Jenny Gonzales (202) 219-0840; Soybeans, soybean products, & cotton, Mae Dean Johnson (202) 219-0840.

Table 19.—Farm Programs, Price Supports, Participation & Payment Rates

	Target price	Basic loan rate	Findley or announced loan rate 1/	Payment rates			Effective base acres 2/	Program 3/	Participation rate 4/
				Paid land diversion					
				Total deficiency	Mandatory	Optional			
				\$/bu.			Mil. acres	Percent of base	Percent of base
Wheat									
1988/89	4.23	2.76	2.21	0.69	---	---	84.8	27.5/0/0	86
1989/90	4.10	2.58	2.06	0.32	---	---	82.3	10/0/0	78
1990/91 5/	4.00	2.44	1.95	1.28	---	---	80.5	6/ 5/0/0	83
1991/92	4.00	2.52	2.04	*1.35	---	---	79.2	15/0/0	85
1992/93	4.00	2.58	2.21	0.81	---	---	78.9	5/0/0	83
1993/94	4.00	2.86	2.45	**1.03	---	---	78.4	0/0/0	87
1994/95	4.00	2.72	2.58	***0.85	---	---	---	0/0/0	---
				\$/cwt					
Rice									
1988/89	11.15	6.63	7/ 6.50	4.31	---	---	4.2	25/0/0	94
1989/90	10.80	6.50	7/ 6.00	3.56	---	---	4.2	25/0/0	94
1990/91 5/	10.71	6.50	7/ 5.40	4.16	---	---	4.2	20/0/0	95
1991/92	10.71	6.50	7/ 5.85	3.07	---	---	4.2	5/0/0	95
1992/93	10.71	6.50	---	4.21	---	---	4.1	0/0/0	96
1993/94	10.71	6.50	---	**3.98	---	---	4.1	5/0/0	96
1994/95	10.71	6.50	---	***0.94	---	---	---	0/0/0	---
				\$/bu.					
Corn									
1988/89	2.93	2.21	1.77	0.36	---	1.75	82.9	20/0/10	87
1989/90	2.84	2.06	1.65	0.58	---	---	82.7	10/0/0	79
1990/91 5/	2.75	1.96	1.57	0.51	---	---	82.6	10/0/0	78
1991/92	2.75	1.89	1.62	0.41	---	---	82.7	7.5/0/0	77
1992/93	2.75	2.01	1.72	0.73	---	---	82.1	5/0/0	76
1993/94	2.75	1.99	1.72	**0.72	---	---	81.8	10/0/0	81
1994/95	2.75	1.99	1.89	***0.40	---	---	---	0/0/0	---
				\$/bu.					
Sorghum									
1988/89	2.78	2.10	1.68	0.48	---	1.65	16.8	20/0/10	82
1989/90	2.70	1.96	1.57	0.66	---	---	16.2	10/0/0	71
1990/91 5/	2.61	1.86	1.49	0.56	---	---	15.4	10/0/0	70
1991/92	2.61	1.80	1.54	0.37	---	---	13.5	7.5/0/0	77
1992/93	2.61	1.91	1.63	0.70	---	---	13.6	5/0/0	79
1993/94	2.61	1.89	1.63	**0.70	---	---	13.5	5/0/0	81
1994/95	2.61	1.89	1.80	***0.46	---	---	---	0/0/0	---
				\$/bu.					
Barley									
1988/89	2.51	1.80	1.44	0.00	---	1.40	12.5	20/0/10	79
1989/90	2.44	1.68	1.34	0.00	---	---	12.3	10/0/0	67
1990/91 5/	2.36	1.60	1.28	0.20	---	---	11.9	10/0/0	68
1991/92	2.36	1.54	1.32	0.62	---	---	11.5	7.5/0/0	76
1992/93	2.36	1.64	1.40	0.56	---	---	11.1	5/0/0	75
1993/94	2.36	1.62	1.40	**0.67	---	---	10.8	0/0/0	82
1994/95	2.36	1.62	1.54	***0.52	---	---	---	0/0/0	---
				\$/bu.					
Oats									
1988/89	1.55	1.14	0.91	0.00	---	---	7.9	5/0/0	30
1989/90	1.50	1.06	0.85	0.00	---	---	7.6	5/0/0	18
1990/91 5/	1.45	1.01	0.81	0.32	---	---	7.5	5/0/0	09
1991/92	1.45	0.97	0.83	0.35	---	---	7.3	0/0/0	38
1992/93	1.45	1.03	0.88	0.17	---	---	7.2	0/0/0	40
1993/94	1.45	1.02	0.88	**0.11	---	---	7.1	0/0/0	46
1994/95	1.45	1.02	0.97	***0.00	---	---	---	0/0/0	---
				\$/bu.					
Soybeans 9/									
1988/89	---	---	4.77	---	---	---	---	---	---
1989/90	---	---	4.53	---	---	---	---	---	---
1990/91 5/	---	---	4.50	---	---	---	---	---	---
1991/92	---	---	5.02	---	---	---	---	---	---
1992/93	---	---	5.02	---	---	---	---	---	---
1993/94	---	---	5.02	---	---	---	---	---	---
1994/95	---	---	4.92	---	---	---	---	---	---
				Cts./lb.					
Upland cotton									
1988/89	75.9	51.80	11/ 51.80	19.4	---	---	14.5	12.5/0/0	89
1989/90	73.4	50.00	11/ 50.00	13.1	---	---	14.6	25/0/0	89
1990/91 5/	72.9	50.27	11/ 50.27	7.3	---	---	14.4	12.5/0/0	86
1991/92 12/	72.9	50.77	11/ 47.23	10.1	---	---	14.6	5/0/0	84
1992/93	72.9	52.35	11/ ---	20.3	---	---	14.9	10/0/0	89
1993/94	72.9	52.35	11/ ---	**18.6	---	---	15.1	7.5/0/0	91
1994/95	72.9	50.00	11/ ---	***12.9	---	---	---	11/0/0	---

1/ There are no Findley loan rates for rice or cotton. See footnotes 7/ & 11/. 2/ National effective crop acreage base as determined by ASCS. Net of CRP.

3/ Program requirements for participating producers (mandatory acreage reduction program/mandatory paid land diversion/optional paid land diversion). Acres idled must be devoted to a conserving use to receive program benefits. 4/ Percentage of effective base acres enrolled in acreage reduction programs. 5/ Payments & loans were reduced by 1.4 percent in 1990/91 due to Gramm-Rudman-Hollings. Budget Reconciliation Act reductions to deficiency payments rates were also in effect in that year. Data do not include these reductions. 6/ Under 1990 modified contracts, participating producers plant up to 105 percent of their wheat base acres. For every acre planted above 95 percent of base, the acreage used to compute deficiency payments was cut by 1 acre. 7/ A marketing loan has been in effect for rice since 1985/86. Loans may be repaid at the lower of: a) the loan rate or b) the adjusted world market price (announced weekly). However, loans cannot be repaid at less than a specified fraction of the loan rate. Data refer to market-year average loan repayment rates. 8/ The sorghum, oats, & barley programs are the same as for corn except as indicated. 9/ There are no target prices, base acres, acreage reduction programs, or deficiency payment rates for soybeans. 10/ Nominal percentage of program crop base acres permitted to shift into soybeans without loss of base. 11/ A marketing loan has been in effect for cotton since 1986/87. In 1987/88 & after, loans may be repaid at the lower of: a) the loan rate or b) the adjusted world market price (announced weekly; Plan B). Starting in 1991/92, loans cannot be repaid at less than 70 percent of the loan rate. Data refer to annual average loan repayment rates. 12/ A marketing certificate program was implemented on Aug. 1, 1991. — = not available.

* For wheat, the 1991/92 rate is the total deficiency payment rate for the "regular" program. For the winter wheat option, the rate is \$1.25.

** For wheat, barley, and oats, regular deficiency payment rate based on the 5-month price. For rice and upland cotton, total deficiency payment rate. For corn and sorghum, rate was projected at sign-up. 5-month regular deficiency payment rate for corn and sorghum is due to be released in March 1994.

*** Estimated total deficiency payment rate. Minimum guaranteed payment rate for 0/85 (wheat & feed grains) & 50/85 (rice and upland cotton) programs. Sign-up for 1994 programs was March 1–April 29, 1994.

Note: 1993 effective base acres and participation rates are from November 30 preliminary compliance report.

Information contact: Agricultural Stabilization and Conservation Service (202) 690-0445.

Table 20.—Fruit

	1985	1986	1987	1988	1989	1990	1991	1992	1993 P
Citrus 1/ Production (1,000 ton)	10,525	11,058	11,993	12,761	13,186	10,860	11,285	12,452	15,338
Per capita consumpt. (lbs.) 2/	21.5	24.2	23.9	25.4	23.5	21.4	19.1	24.3	—
Noncitrus 3/ Production (1,000 tons)	14,191	13,874	16,011	15,893	16,365	15,657	15,748	17,116	15,936
Per capita consumpt. (lbs.) 2/	65.1	68.7	73.4	71.7	73.0	70.8	70.8	74.4	—
1993									
	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb
F.o.b. shipping point prices									
Apples (\$/carton) 4/	11.50	11.50	12.78	13.34	12.33	12.00	12.00	12.00	13.00
Pears (\$/box) 5/	18.28	—	—	—	12.07	11.04	10.05	9.97	10.08
Grower prices									
Oranges (\$/box) 6/	3.83	4.87	7.27	10.52	11.87	5.25	3.95	3.91	4.14
Grapefruit (\$/box) 6/	1.45	3.53	2.44	3.51	8.13	4.19	4.38	3.20	3.20
Stocks, ending									
Fresh apples (mil. lbs.)	488.9	201.2	28.4	3,256.8	5,423.4	5,179.4	4,427.9	3,747.3	2,937.8
Fresh pears (mil. lbs.)	1.6	7.1	146.5	556.8	552.1	41.8	358.5	297.3	238.9
Frozen fruits (mil. lbs.)	710.3	831.3	939.8	997.9	1,179.0	1,110.8	1,008.8	935.7	851.3
Frozen orange juice (mil. lbs.)	1,351.8	1,147.0	1,029.6	875.7	817.2	890.9	955.5	1,229.0	1,410.8

1/ 1992 indicated 1991/92 season. 2/ Fresh per capita consumption. 3/ Calendar year. 4/ Red delicious, Washington, extra fancy, carton tray pack, 125's. 5/ D'Anjou, Washington, standard box wrapped, U.S. no. 1, 135's. 6/ U.S. equivalent on-tree returns. P = preliminary. — = not available.

Information contact: Wynne Napper (202) 219-0884.

Table 21.—Vegetables

	Calendar year									
	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993 P
Production										
Total vegetables (1,000 cwt)	456,334	453,030	448,629	478,381	468,779	542,437	561,704	564,581	538,637	532,109
Fresh (1,000 cwt) 1/ 3/	201,817	203,549	203,165	220,539	228,397	239,281	239,104	229,505	245,752	237,027
Processed (tons) 2/ 3/	12,725,880	12,474,040	12,273,200	12,892,100	12,019,110	15,157,790	16,130,020	16,753,820	14,644,260	14,754,080
Mushrooms (1,000 lbs.) 4/	595,681	587,956	614,393	631,819	667,759	714,992	749,151	746,832	776,357	—
Potatoes (1,000 cwt)	362,039	406,609	361,743	389,320	356,438	370,444	402,110	417,622	425,367	419,415
Sweetpotatoes (1,000 cwt)	12,902	14,573	12,368	11,611	10,945	11,358	12,594	11,203	12,005	11,791
Dry edible beans (1,000 cwt)	21,070	22,298	22,960	26,031	19,253	23,729	32,379	33,765	22,615	21,842
1993										1994
	Jan	Feb	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Shipments (1,000 cwt)										
Fresh	19,087	18,977	19,416	16,292	18,424	16,281	15,287	19,306	17,281	17,809
Iceberg lettuce	4,287	4,172	3,715	3,971	4,971	4,110	3,263	4,187	3,376	3,407
Tomatoes, all	2,927	3,109	2,742	2,183	2,944	2,885	2,408	2,200	2,568	3,074
Dry-bulb onions	2,856	2,747	2,877	2,793	3,639	2,859	2,776	2,960	2,363	2,282
Other 5/	9,017	8,949	10,082	7,345	6,870	6,427	6,840	9,959	8,974	9,046
Potatoes, all	13,376	11,180	9,393	8,622	13,504	11,563	12,404	14,952	13,141	12,953
Sweetpotatoes	291	270	178	154	343	244	565	353	172	211

1/ Includes fresh production of asparagus, broccoli, carrots, cauliflower, celery, sweet corn, lettuce, honeydews, onions, & tomatoes. 2/ Includes processing production of snap beans, sweet corn, green peas, tomatoes, cucumbers (for pickles), asparagus, broccoli, carrots, & cauliflower. 3/ Excludes estimates reinstated in 1992 to preserve series comparability. 4/ Fresh & processing agaricus mushrooms only. Excludes specialty varieties. Crop year July 1 - June 30. 5/ Includes snap beans, broccoli, cabbage, carrots, cauliflower, celery, sweet corn, cucumbers, eggplant, bell peppers, squash, cantaloupes, honeydews, & watermelons. P = preliminary. — = not available.

Information contacts: Gary Lucier or John Love (202) 219-0884.

Table 22.—Other Commodities

	Annual					1992	1993			
	1989	1990	1991	1992	1993	Oct-Dec	Jan-Mar	Apr-June	July-Sept	Oct-Dec
Sugar										
Production 1/	6,841	6,334	7,145	7,492	7,824	3,919	2,351	825	735	3,902
Deliveries 1/	8,340	8,661	8,693	8,936	9,023	2,303	2,067	2,201	2,491	2,264
Stocks, ending 1/	2,947	2,729	3,039	3,225	3,486	3,225	3,904	2,957	1,599	3,486
Coffee										
Composite green price N.Y. (cts./lb.)	95.17	76.93	70.09	55.30	64.31	61.94	60.48	55.07	69.47	72.21
Imports, green bean equiv. (mil. lbs.) 2/	2,685	2,715	2,553	2,989	2,498	705	757	596	575	570
1993										1994
	1990	1991	1992	Nov	June	July	Aug	Sept	Oct	Nov
Tobacco										
Prices at auctions 3/										
Flue-cured (\$/lb.)	167.3	172.3	172.7	170.5	—	158.0	160.0	173.0	175.0	169.5
Burley (\$/lb.)	175.3	178.8	181.5	183.0	—	—	—	—	—	—
Domestic consumption 4/										
Cigarettes (bil.)	523.1	516.3	509.5	44.2	41.0	37.5	39.2	37.4	32.1	38.5
Large cigars (mil.)	2,343.5	2,231.9	2,217.1	189.6	227.7	154.5	211.6	192.8	174.4	160.0

1/ 1,000 short tons, raw value. Quarterly data shown at end of each quarter. 2/ Net imports of green & processed coffee. 3/ Crop year July-June for flue-cured, Oct.-Sept. for burley. 4/ Taxable removals. — = not available.

Information contacts: Sugar, Peter Buzzanell (202) 219-0886, Coffee, Fred Gray (202) 219-0888, Tobacco, Verner Grise (202) 219-0890.

World Agriculture

Table 23.—World Supply & Utilization of Major Crops, Livestock & Products

	1987/88	1988/89	1989/90	1990/91	1991/92	1992/93 P	1993/94 F
Million units							
Wheat							
Area (hectares)	219.7	217.4	225.8	231.5	222.4	223.0	222.3
Production (metric tons)	496.0	495.0	533.2	588.2	542.6	561.4	560.3
Exports (metric tons) 1/	112.1	102.3	102.3	101.2	108.7	110.4	99.0
Consumption (metric tons) 2/	525.3	524.3	532.2	563.5	559.3	544.3	562.6
Ending stocks (metric tons) 3/	149.8	120.5	121.5	146.2	129.5	146.5	144.1
Coarse grains							
Area (hectares)	323.3	323.2	320.8	314.2	317.8	318.3	311.0
Production (metric tons)	784.2	721.1	791.0	821.8	803.4	860.7	784.3
Exports (metric tons) 1/	88.2	95.3	103.8	88.2	93.8	88.9	83.8
Consumption (metric tons) 2/	807.2	785.0	814.1	809.5	809.6	831.6	825.5
Ending stocks (metric tons) 3/	215.0	151.0	128.0	140.3	134.1	163.2	122.0
Rice, milled							
Area (hectares)	141.7	145.5	146.6	146.7	145.7	145.2	142.8
Production (metric tons)	314.5	330.1	343.1	350.7	348.3	352.0	348.0
Exports (metric tons) 4/	11.2	13.9	11.7	12.0	14.1	14.8	15.8
Consumption (metric tons) 2/	319.9	327.7	336.4	345.8	352.8	355.6	355.2
Ending stocks (metric tons) 3/	45.5	47.8	54.5	59.4	54.9	51.3	44.1
Total grains							
Area (hectares)	684.7	686.1	693.2	692.4	685.9	686.5	676.1
Production (metric tons)	1,594.7	1,546.2	1,667.3	1,760.7	1,694.3	1,774.1	1,692.6
Exports (metric tons) 1/	211.5	211.5	217.8	201.4	216.6	214.1	198.6
Consumption (metric tons) 2/	1,652.4	1,637.0	1,682.7	1,718.8	1,721.7	1,731.5	1,743.3
Ending stocks (metric tons) 3/	410.3	319.3	304.0	345.9	318.5	361.0	310.2
Oilseeds							
Crush (metric tons)	168.4	164.5	171.7	176.7	184.3	184.3	185.5
Production (metric tons)	210.5	201.6	212.4	215.8	223.5	227.0	223.5
Exports (metric tons)	39.5	31.5	35.6	33.4	37.7	37.7	36.8
Ending stocks (metric tons)	24.0	22.1	23.7	23.4	21.8	23.3	19.5
Meals							
Production (metric tons)	115.4	111.1	116.8	119.3	124.7	125.5	127.1
Exports (metric tons)	35.8	37.4	39.8	40.7	43.1	42.5	43.6
Oils							
Production (metric tons)	53.3	53.3	57.1	58.1	60.3	61.0	62.7
Exports (metric tons)	17.5	18.1	20.4	20.6	20.8	20.7	21.2
Cotton							
Area (hectares)	30.6	33.8	31.6	33.1	34.8	32.8	31.5
Production (bales)	81.0	84.4	79.7	87.0	96.0	82.8	76.7
Exports (bales)	29.9	33.4	31.3	29.7	28.1	24.8	26.1
Consumption (bales)	84.2	85.3	86.6	85.5	84.5	85.6	84.8
Ending stocks (bales)	32.6	31.4	25.8	28.2	40.6	38.5	30.5
	1988	1989	1990	1991	1992	1993 P	1994 F
Red meat							
Production (metric tons)	112.8	114.2	116.3	117.7	118.1	118.9	120.7
Consumption (metric tons)	110.8	112.8	114.2	115.8	116.5	117.6	119.3
Exports (metric tons) 1/	6.9	7.0	7.1	7.4	7.0	6.6	6.9
Poultry 5/							
Production (metric tons)	32	33.1	35.0	36.8	39	40.5	42.1
Consumption (metric tons)	31.4	32.6	34.3	36.2	38.5	39.8	41.4
Exports (metric tons) 1/	1.7	1.7	1.9	2.2	2.3	2.6	2.9
Dairy							
Milk production (metric tons) 6/	—	387.4	395.3	385.3	379.6	379.9	380.3

1/ Excludes intra-EC trade. 2/ Where stocks data not available (excluding USSR), consumption includes stock changes. 3/ Stocks data are based on differing marketing years & do not represent levels at a given date. Data not available for all countries; includes estimated change in USSR grain stocks but not absolute level. 4/ Calendar year data. 1988 data correspond with 1987/88, etc. 5/ Poultry excludes the Peoples Republic of China before 1986. 6/ Data prior to 1989 no longer comparable. P = preliminary. F = forecast. — = not available.

Information contacts: Crops, Carol Whitton (202) 219-0824; red meat & poultry, Linda Bailey (202) 219-1285; dairy, Sara Short (202) 219-0770.

U.S. Agricultural Trade

Table 24.—Prices of Principal U.S. Agricultural Trade Products

	Annual			1993					1994	
	1991	1992	1993	Feb	Sept	Oct	Nov	Dec	Jan	Feb
Export commodities										
Wheat, f.o.b. vessel, Gulf ports (\$/bu.)	3.52	4.13	3.83	4.06	3.58	3.72	3.99	4.33	4.22	4.01
Corn, f.o.b. vessel, Gulf ports (\$/bu.)	2.75	2.66	2.62	2.42	2.59	2.71	2.97	3.10	3.23	3.15
Grain sorghum, f.o.b. vessel, Gulf ports (\$/bu.)	2.69	2.63	2.56	2.42	2.52	2.57	2.93	3.07	3.14	3.07
Soybeans, f.o.b. vessel, Gulf ports (\$/bu.)	6.05	6.01	6.53	6.03	6.69	6.40	6.88	7.18	7.30	7.12
Soybean oil, Decatur (cts./lb.)	20.14	19.16	22.83	20.61	23.51	22.90	25.42	28.19	29.89	28.73
Soybean meal, Decatur (\$/ton)	172.90	177.79	199.18	179.87	202.13	195.43	211.31	206.81	198.44	198.37
Cotton, 7—market avg. spot (cts./lb.)	69.69	53.90	55.36	55.38	54.01	54.57	55.61	60.29	66.53	72.69
Tobacco, avg. price at auction (cts./lb.)	179.23	172.58	171.20	186.53	173.08	174.92	181.01	181.47	181.01	188.03
Rice, f.o.b. mill, Houston (\$/cwt)	16.46	16.80	16.12	15.00	13.50	16.13	23.50	25.50	25.50	25.5
Inedible tallow, Chicago (cts./lb.)	13.26	14.37	14.89	14.69	14.47	14.67	14.50	14.74	15.33	15.14
Import commodities										
Coffee, N.Y. spot (\$/lb.)	0.71	0.50	0.59	0.54	0.68	0.66	0.65	0.63	0.64	0.68
Rubber, N.Y. spot (cts./lb.)	45.73	46.25	45.00	48.30	44.54	44.23	44.91	44.75	44.91	46.12
Cocoa beans, N.Y. (\$/lb.)	0.52	0.47	0.47	0.42	0.53	0.53	0.54	0.57	0.53	0.51

Information contact: Mary Teymourian (202) 219-0824.

Table 25.—Indexes of Real Trade-Weighted Dollar Exchange Rates^{1/}

	1993									1994	
	Apr	May	June	July	Aug	Sept P	Oct P	Nov P	Dec P	Jan P	Feb P
	1985 = 100										
Total U.S. trade 2/	66.0	67.4	66.8	68.8	68.8	67.1	68.2	69.7	69.9	70.6	70.1
Agricultural trade											
U.S. markets	76.1	77.3	76.1	77.1	76.8	76.0	76.6	77.4	77.7	78.2	77.4
U.S. competitors	76.9	79.2	77.6	78.5	78.6	78.0	78.2	78.4	78.4	79.1	79.4
Wheat											
U.S. markets	95.1	94.1	93.6	94.0	93.2	92.4	92.9	93.0	93.1	93.6	93.0
U.S. competitors	73.2	82.7	74.9	75.7	76.8	76.8	77.1	77.1	77.2	77.0	77.2
Soybeans											
U.S. markets	63.6	63.9	64.3	65.8	65.5	64.2	65.0	66.4	66.6	67.3	66.4
U.S. competitors	51.5	51.1	50.3	50.1	49.6	49.3	49.3	49.0	49.1	50.0	50.8
Corn											
U.S. markets	66.7	66.7	66.4	67.3	66.8	66.4	67.1	67.9	68.2	68.7	67.4
U.S. competitors	57.5	57.2	57.8	59.2	59.7	58.2	58.7	59.6	59.3	59.9	59.8
Cotton											
U.S. markets	71.6	72.2	71.1	72.0	71.7	71.3	72.0	72.6	72.9	73.2	72.1
U.S. competitors	105.7	105.4	104.4	105.7	105.9	105.2	104.8	105.8	109.3	111.0	111.9

^{1/} Real indexes adjust nominal exchange rates for differences in rates of inflation, to avoid the distortion caused by high-inflation countries. A higher value means the dollar has appreciated. See the October 1988 issue of Agricultural Outlook for a discussion of the calculations and the weights used. ^{2/} Federal Reserve Board Index of trade-weighted value of the U.S. dollar against 10 major currencies. Weights are based on relative importance in world financial markets. P = preliminary.

Information contact: Douglas Rhoades or Tim Baxter (202) 219-0782.

Table 26.—Trade Balance

	Fiscal year 1/								Jan
	1987	1988	1989	1990	1991	1992	1993	1994 F	1994
	\$ million								
Exports									
Agricultural	27,876	35,316	39,590	40,220	37,609	42,430	42,590	42,500	3,737
Nonagricultural	202,911	258,656	301,269	326,059	356,682	383,517	390,770	—	31,895
Total 2/	230,787	293,972	340,859	366,279	394,291	425,947	433,360	—	35,632
Imports									
Agricultural	20,650	21,014	21,476	22,560	22,588	24,323	24,454	24,500	2,173
Nonagricultural	367,374	409,138	441,075	458,101	463,720	488,556	537,584	—	43,904
Total 3/	388,024	430,152	462,551	480,661	486,308	512,879	562,038	—	46,077
Trade balance									
Agricultural	7,226	14,302	18,114	17,660	15,021	18,107	18,136	18,000	1,564
Nonagricultural	-164,463	-150,482	-139,806	-132,042	-107,038	-105,039	-146,814	—	-12,009
Total	-157,237	-136,180	-121,692	-114,382	-92,017	-86,932	-128,678	—	-10,445

^{1/} Fiscal years begin October 1 & end September 30. Fiscal year 1993 began Oct. 1, 1992 & ended Sept. 30, 1993. ^{2/} Domestic exports including Department of Defense shipments (F.A.S. value). ^{3/} Imports for consumption (customs value). F = forecast. — = not available.

Information contact: Joel Greene (202) 219-0822.

Table 27.—U.S. Agricultural Exports & Imports

	Fiscal year*			Jan	Fiscal year*			Jan
	1992	1993	1994 F	1994	1992	1993	1994 F	1994
	1,000 units				\$ million			
EXPORTS								
Animals, live (no.) 1/	1,476	1,107	—	98	567	358	—	44
Meats & preps., excl. poultry (mt)	1,107	1,160	2/ 1,000	92	3,236	3,349	—	246
Dairy products (mt) 1/	174	211	—	18	641	762	900	73
Poultry meats (mt)	794	986	1,100	85	915	1,031	—	89
Fats, oils, & greases (mt)	1,392	1,362	1,300	92	498	519	—	35
Hides & skins incl. furskins	—	—	—	—	1,336	1,288	—	118
Cattle hides, whole (no.) 1/	20,803	19,784	—	1,738	1,106	1,062	—	95
Mink pelts (no.) 1/	3,160	3,119	—	174	52	56	—	3
Grains & feeds (mt)	100,881	103,743	—	7,575	13,873	14,104	3/ 13,700	1,152
Wheat (mt)	34,322	36,078	31,500	2,976	4,323	4,737	4/ 4,300	393
Wheat flour (mt)	813	1,075	1,100	116	165	217	—	24
Rice (mt)	2,279	2,710	2,700	179	757	766	1,100	70
Feed grains, incl. products (mt)	50,752	50,705	39,100	3,102	5,801	5,261	4,700	398
Feeds & fodders (mt)	11,267	11,500	5/ 12,000	1,055	2,019	2,147	—	187
Other grain products (mt)	1,448	1,676	—	147	807	976	—	81
Fruits, nuts, & preps. (mt)	3,505	3,398	—	291	3,514	3,409	3,900	278
Fruit juices incl.	—	—	—	—	—	—	—	—
froz. (1,000 hectoliters) 1/	7,767	7,845	—	409	427	423	—	29
Vegetables & preps. (mt)	2,703	2,790	—	214	2,790	3,220	—	264
Tobacco, unmanufactured (mt)	246	231	—	16	1,568	1,443	1,200	111
Cotton, excl. linters (mt)	1,494	1,125	1,500	161	2,183	1,526	2,000	207
Seeds (mt)	612	533	—	66	650	648	700	92
Sugar, cane or beet (mt) 1/	492	337	—	26	154	106	—	9
Oilseeds & products (mt)	28,671	29,190	—	2,599	7,162	7,211	7,000	745
Oilseeds (mt)	19,939	21,049	—	1,982	4,735	4,982	—	556
Soybeans (mt)	19,277	20,400	16,500	1,932	4,318	4,606	4,300	514
Protein meal (mt)	7,082	6,539	—	493	1,445	1,261	—	104
Vegetable oils (mt)	1,651	1,601	—	124	982	968	—	85
Essential oils (mt)	13	13	—	1	184	185	—	18
Other	91	92	—	6	2,733	3,011	—	229
Total	142,175	145,171	127,100	11,242	42,430	42,590	42,500	3,737
IMPORTS								
Animals, live (no.) 1/	2,830	3,461	—	220	1,275	1,569	1,600	81
Meats & preps., excl. poultry (mt)	1,134	1,128	—	128	2,684	2,726	—	290
Beef & veal (mt)	813	793	780	98	1,933	1,919	1,900	222
Pork (mt)	263	276	315	25	625	663	800	55
Dairy products (mt) 1/	232	231	—	20	816	860	900	73
Poultry & products 1/	—	—	—	—	132	137	—	11
Fats, oils, & greases (mt)	46	44	—	4	26	30	—	2
Hides & skins, incl. furskins 1/	—	—	—	—	185	181	—	22
Wool, unmanufactured (mt)	54	60	—	6	167	173	—	15
Grains & feeds (mt)	5,446	4,942	7,100	79,819	1,548	1,639	2,100	167
Fruits, nuts, & preps., excl. juices (mt)	5,883	6,089	5,980	545	2,919	2,988	—	273
Bananas & plantains (mt)	3,626	3,737	3,700	300	1,083	1,083	1,000	80
Fruit juices (1,000 hectoliters) 1/	26,049	27,053	22,000	2,418	871	640	—	54
Vegetables & preps. (mt)	2,171	2,733	—	318	2,125	2,440	2,500	295
Tobacco, unmanufactured (mt)	364	386	250	9	1,299	1,101	700	31
Cotton, unmanufactured (mt)	11	12	—	1	10	11	—	1
Seeds (mt)	174	189	220	32	214	214	200	22
Nursery stock & cut flowers 1/	—	—	—	—	578	629	—	57
Sugar, cane or beet (mt)	1,623	1,569	—	72	633	591	—	31
Oilseeds & products (mt)	2,330	2,484	—	343	1,124	1,204	1,400	142
Oilseeds (mt)	429	373	—	84	135	130	—	24
Protein meal (mt)	629	618	—	67	84	89	—	10
Vegetable oils (mt)	1,273	1,492	—	192	904	985	—	108
Beverages excl. fruit juices (1,000 hectoliters) 1/	13,739	14,014	—	905	2,044	1,975	—	116
Coffee, tea, cocoa, spices (mt)	2,391	2,244	2,300	195	3,415	3,018	—	295
Coffee, incl. products (mt)	1,330	1,185	1,250	95	1,798	1,502	1,600	154
Cocoa beans & products (mt)	773	770	750	67	1,122	1,028	1,000	90
Rubber & allied gums (mt)	920	981	1,200	89	756	839	900	73
Other	—	—	—	—	1,503	1,488	—	120
Total	—	—	—	—	24,323	24,454	24,500	2,173

*Fiscal years begin Oct. 1 & end Sept. 30. Fiscal year 1993 began Oct. 1, 1992 & ended Sept. 30, 1993. 1/ Not included in total volume.

2/ Forecasts for footnoted items 2/–5/ are based on slightly different groups of commodities. Totals for fiscal 1993 forecast commodities were 2/ 903 million tons. 3/ \$14,332 million. 4/ \$4,954 million, includes flour. 5/ \$11,885 million. F = forecast. — = not available.

Information contact: Joel Greene (202) 219–0822.

Table 28.—U.S. Agricultural Exports by Region

Region & country	Fiscal year*			Jan	Change from year* earlier			Jan
	1992	1993	1994 F	1994	1992	1993	1994 F	1994
	\$ million				Percent			
WESTERN EUROPE	7,740	7,499	7,300	742	6	-3	-3	-15
European Community (EC-12)	7,193	7,022	6,800	705	6	-2	-3	-16
Belgium-Luxembourg	461	482	—	49	-1	5	—	-9
France	618	613	—	36	8	-1	—	-63
Germany	1,091	1,146	—	107	-4	5	—	11
Italy	684	568	—	59	1	-17	—	-30
Netherlands	1,812	1,801	—	208	16	-1	—	-2
United Kingdom	882	916	—	70	0	4	—	-19
Portugal	240	223	—	19	-4	-7	—	-22
Spain, incl. Canary Islands	951	829	—	103	11	-13	—	-6
Other Western Europe	546	477	500	38	2	-13	5	3
Switzerland	187	152	—	11	-4	-19	—	-9
EASTERN EUROPE	222	468	400	32	-27	111	-15	-20
Poland	49	230	—	5	7	368	—	-84
Former Yugoslavia	50	47	—	26	-32	-6	—	2,558
Romania	76	107	—	1	-7	42	—	-78
Former Soviet Union	2,704	1,561	1,300	98	54	-42	-17	45
ASIA	17,782	17,832	16,400	1,580	10	0	-8	-5
West Asia (Mideast)	1,770	1,922	2,000	148	24	9	4	-1
Turkey	344	369	—	17	54	7	—	39
Iraq	0	1	0	0	0	150	0	0
Israel, incl. Gaza & W. Bank	346	382	400	45	21	10	5	259
Saudi Arabia	549	463	500	47	2	-16	8	17
South Asia	536	641	—	72	43	20	—	-35
Bangladesh	123	52	—	20	84	-58	—	945
India	117	226	—	14	24	93	—	-64
Pakistan	226	236	300	37	57	4	27	-35
China	690	322	300	18	3	-53	-7	-55
Japan	8,383	8,461	9,100	719	8	1	8	10
Southeast Asia	1,470	1,551	—	157	19	6	—	22
Indonesia	353	327	—	32	27	-7	—	56
Philippines	443	512	600	48	19	16	17	29
Other East Asia	4,934	4,935	5,000	467	6	0	1	11
Taiwan	1,916	1,999	2,100	204	10	4	5	32
Korea, Rep.	2,200	2,041	1,900	197	2	-7	-7	-5
Hong Kong	817	880	900	66	10	8	2	12
AFRICA	2,304	2,671	2,400	243	22	16	-10	3
North Africa	1,411	1,659	1,600	186	2	18	-4	38
Morocco	156	310	—	19	21	98	—	-26
Algeria	478	458	500	89	0	-4	9	125
Egypt	709	756	700	65	2	7	-7	22
Sub-Saharan	893	1,012	800	57	80	13	-21	-44
Nigeria	31	158	—	4	-30	413	—	-62
Rep. S. Africa	328	383	—	13	343	17	—	-74
LATIN AMERICA & CARIBBEAN	6,438	6,883	6,900	615	17	7	0	16
Brazil	143	231	200	33	-47	61	-13	88
Caribbean Islands	970	1,015	—	70	-4	5	—	-7
Central America	587	675	—	53	18	15	—	3
Colombia	142	234	—	25	15	65	—	58
Mexico	3,676	3,660	3,900	346	27	0	7	17
Peru	179	172	—	14	19	-4	—	40
Venezuela	394	502	400	39	28	27	-20	8
CANADA	4,812	5,220	5,400	382	9	8	3	-2
OCEANIA	428	456	400	45	23	6	-12	43
TOTAL	42,430	42,590	42,500	3,737	13	0	0	2
Developed countries	21,968	22,337	22,600	1,940	9	2	1	-3
Developing countries	19,771	19,918	—	1,779	17	1	—	9
Other countries	691	335	—	18	3	-51	—	-55

* Fiscal years begin Oct. 1 & end Sept. 30. Fiscal year 1993 began Oct. 1, 1992 & ended Sept. 30, 1993. F = forecast. — = not available.
 Note: Adjusted for transshipments through Canada.

Information contact: Joel Greene (202) 219-0822.

Farm Income

Table 29.—Farm Income Statistics

	Calendar year										
	1984	1985	1986	1987	1988	1989	1990	1991	1992 P	1993 F	1994 F
	\$ billion										
1. Farm receipts	147.7	150.1	140.0	148.5	158.4	168.9	177.5	176.5	178.8	179	183 to 190
Crops (incl. net CCC loans)	69.9	74.3	63.7	65.9	71.7	77.0	80.1	81.9	84.8	82	87 to 91
Livestock	72.9	69.8	71.6	76.0	79.4	84.1	89.8	86.8	86.4	90	87 to 91
Farm related 1/	4.9	6.0	5.7	6.6	7.3	7.8	7.6	7.8	7.6	7	7 to 9
2. Direct Government payments	8.4	7.7	11.8	16.7	14.5	10.9	9.3	8.2	9.2	11	10 to 12
Cash payments	4.0	7.6	8.1	6.6	7.1	9.1	8.4	8.2	9.2	11	10 to 11
Value of PIK commodities	4.5	0.1	3.7	10.1	7.4	1.7	0.9	0.0	0.0	0	0 to 1
3. Gross cash income (1+2) 2/	156.1	157.9	152.8	165.1	172.9	179.8	186.8	184.7	187.9	190	193 to 201
4. Nonmoney income 3/	5.9	5.6	5.5	5.6	6.3	6.3	6.2	5.9	6.1	6	6 to 7
5. Value of inventory change	6.0	-2.3	-2.2	-2.3	-3.4	4.8	3.4	-0.3	3.8	-3	3 to 7
6. Total gross farm income (3+4+5)	168.0	161.2	156.1	168.5	175.8	190.9	196.4	190.3	197.7	194	204 to 213
7. Cash expenses 4/	118.7	110.7	105.0	109.4	118.4	125.1	130.9	131.4	130.2	131	130 to 138
8. Total expenses	141.9	132.4	125.1	128.8	137.0	144.0	149.9	150.3	149.1	151	150 to 159
9. Net cash income (3-7)	37.4	47.1	47.8	55.8	54.5	54.7	55.9	53.3	57.7	59	58 to 66
10. Net farm income (6-8)	26.1	28.8	31.0	39.7	38.8	46.9	46.5	40.0	48.6	43	50 to 58
Deflated (1987\$)	28.7	30.5	32.0	39.7	37.3	43.3	41.1	34.0	40.2	35	40 to 46

1/ Income from machine hire, custom work, sales of forest products, & other miscellaneous cash sources. 2/ Numbers in parentheses indicate the combination of items required to calculate a given item. 3/ Value of home consumption of self-produced food & imputed gross rental value of farm dwellings. 4/ Excludes capital consumption, perquisites to hired labor, & farm household expenses. Total may not add because of rounding. P = preliminary. F = forecast.

Note: 1988-92 accounts (primarily expenses) have been revised to reflect improved methods for estimating farm income. Call contact for information.

Information contact: Robert McElroy (202) 219-0800.

Table 30.—Average Income to Farm Operator Households

	Calendar year					
	1989	1990	1991	1992 P	1993 F	1994 F
	\$ per operator household					
Farm income to household 1/	5,796	5,742	4,397	4,882	4,900	4,500 to 5,500
Self-employment farm income	4,723	4,973	2,283	3,677	n/a	n/a
Other farm income to household	1,073	768	2,114	1,205	n/a	n/a
Plus: Total off-farm income	26,223	33,265	31,638	35,731	35,000	31,500 to 41,500
Income from wages, salaries, and non-farm businesses	19,467	24,778	23,551	27,022	n/a	n/a
Income from interest, dividends, transfer payments, etc.	6,756	8,487	8,087	8,709	n/a	n/a
Equals: Farm operator household income	32,019	39,007	36,035	40,613	39,800	36,000 to 47,000

1/ Farm income to the household equals self-employment income plus amounts that operators pay themselves & family members to work on the farm, income from renting out acreage, & net income from a farm business other than the one being surveyed. Data for 1989-90 are based on surveys that did not fully account for small farms. Data for 1991 include an additional 350,000 farms, many with gross sales under \$10,000 & negative net farm incomes. P = preliminary. F = forecasts. n/a = not available at this time.

Information contact: Janet Perry (202) 219-0807.

Table 31.—Balance Sheet of the U.S. Farming Sector

	Calendar year 1/										
	1984	1985	1986	1987	1988	1989	1990	1991	1992 P	1993 F	1994 F
	\$ billion										
Assets											
Real estate	661.8	586.2	542.3	578.9	595.5	615.7	628.2	623.2	633.1	648	660 to 670
Non-real estate	195.2	186.5	182.1	193.7	205.6	214.1	220.2	219.1	228.4	230	230 to 240
Livestock & poultry	49.5	46.3	47.8	58.0	62.2	66.2	70.9	68.1	71.3	71	72 to 76
Machinery & motor vehicles	85.0	82.9	81.5	80.0	81.2	85.1	85.4	85.8	85.6	86	85 to 89
Crops stored 2/	26.1	22.9	16.3	17.5	23.3	23.4	22.8	22.0	24.1	25	24 to 28
Purchased inputs	2.0	1.2	2.1	3.2	3.5	2.6	2.8	2.6	3.9	3	2 to 4
Financial assets	32.6	33.3	34.5	35.1	35.4	36.8	38.3	40.6	43.4	45	45 to 49
Total farm assets	857.0	772.7	724.4	772.6	801.1	829.7	848.4	842.2	861.5	878	895 to 905
Liabilities											
Real estate debt 3/	106.7	100.1	90.4	82.4	77.6	75.4	74.1	74.6	75.6	76	76 to 80
Non-real estate debt 4/	87.1	77.5	66.6	62.0	61.7	61.9	63.2	64.3	63.6	65	64 to 68
Total farm debt	193.8	177.6	157.0	144.4	139.4	137.2	137.4	138.9	139.3	141	141 to 147
Total farm equity	663.3	595.1	567.5	628.2	661.7	692.4	710.9	703.3	722.2	737	750 to 760
	Percent										
Selected ratios											
Debt-to-assets	22.6	23.0	21.7	18.7	17.4	16.5	16.2	16.5	16.2	16	15 to 17
Debt-to-equity	29.2	29.8	27.7	23.0	21.1	19.8	19.3	19.7	19.3	19	18 to 20
Debt-to-net cash income	518	377	328	259	256	251	246	260	241	237	240 to 250

1/ As of Dec. 31. 2/ Non-CCC crops held on farms plus value above loan rates for crops held under CCC. 3/ Excludes debt on operator dwellings, but includes CCC storage and drying facilities loans. 4/ Excludes debt for nonfarm purposes. F = forecast.

Information contacts: Ken Erickson or Jim Ryan (202) 219-0798.

Table 32.—Cash Receipts From Farm Marketings, by State

Region & State	Livestock & products				Crops 1/				Total 1/			
	1992	1993	Dec 1993	Jan 1994	1992	1993	Dec 1993	Jan 1994	1992	1993	Dec 1993	Jan 1994
	\$ million 2/											
NORTH ATLANTIC												
Maine	301	316	27	26	213	202	18	21	513	517	45	47
New Hampshire	65	65	6	6	79	79	6	6	144	144	11	12
Vermont	389	378	37	32	63	61	3	3	452	439	40	35
Massachusetts	135	135	11	11	356	360	36	19	491	495	47	31
Rhode Island	13	13	1	1	60	59	7	3	72	72	8	4
Connecticut	240	274	23	24	249	242	16	33	489	517	40	57
New York	1,914	1,886	187	162	1,032	1,032	107	61	2,946	2,918	294	224
New Jersey	192	192	16	16	465	465	28	16	657	657	44	32
Pennsylvania	2,554	2,576	241	208	1,064	1,079	99	111	3,618	3,655	340	319
NORTH CENTRAL												
Ohio	1,580	1,632	134	132	2,587	2,548	248	199	4,167	4,180	382	331
Indiana	1,821	1,918	158	156	2,684	3,185	328	319	4,505	5,103	486	475
Illinois	2,202	2,259	193	186	5,431	5,814	483	846	7,634	8,073	676	1,032
Michigan	1,325	1,353	124	116	1,962	2,396	303	194	3,286	3,749	427	310
Wisconsin	4,313	4,300	462	336	1,186	1,113	127	116	5,499	5,414	589	452
Minnesota	3,622	3,721	308	295	3,460	2,816	355	202	7,082	6,537	663	497
Iowa	5,614	5,898	526	454	4,716	4,213	395	420	10,330	10,111	921	873
Missouri	2,188	2,303	178	159	1,935	1,797	180	229	4,123	4,100	359	388
North Dakota	755	771	69	89	2,339	2,264	263	279	3,094	3,035	331	368
South Dakota	1,966	2,057	140	186	1,263	1,181	138	103	3,229	3,238	278	289
Nebraska	5,674	5,852	353	395	3,109	3,096	480	411	8,783	8,949	833	806
Kansas	4,558	4,675	530	414	2,442	2,621	341	286	7,000	7,295	870	701
SOUTHERN												
Delaware	451	501	38	42	184	170	9	7	636	671	47	48
Maryland	804	855	88	67	587	548	35	28	1,391	1,402	124	95
Virginia	1,353	1,417	110	88	781	687	56	34	2,134	2,105	166	123
West Virginia	267	258	19	18	75	75	8	6	343	334	27	25
North Carolina	2,795	3,132	245	230	2,386	2,225	140	87	5,181	5,357	385	318
South Carolina	545	550	48	44	632	594	43	33	1,177	1,144	91	77
Georgia	2,309	2,495	199	202	1,764	1,603	133	100	4,073	4,098	332	302
Florida	1,160	1,171	96	99	4,985	4,748	418	496	6,145	5,919	513	595
Kentucky	1,641	1,686	91	117	1,580	1,675	441	285	3,221	3,361	533	403
Tennessee	1,061	1,076	86	70	1,042	1,002	191	138	2,103	2,078	277	208
Alabama	2,063	2,152	152	163	768	738	81	51	2,830	2,890	233	214
Mississippi	1,355	1,507	121	123	1,247	1,041	200	117	2,602	2,548	321	240
Arkansas	2,702	2,855	221	219	1,901	1,516	241	180	4,602	4,370	462	399
Louisiana	587	614	47	42	1,259	1,095	262	142	1,846	1,709	309	184
Oklahoma	2,498	2,683	123	184	1,137	1,096	101	93	3,635	3,780	224	277
Texas	7,523	8,221	466	588	4,097	4,202	614	601	11,620	12,423	1,080	1,188
WESTERN												
Montana	921	986	90	80	821	818	108	124	1,742	1,804	198	204
Idaho	1,173	1,231	95	98	1,643	1,714	198	118	2,816	2,945	293	216
Wyoming	606	634	43	34	167	158	29	10	773	792	72	44
Colorado	2,955	3,051	198	234	1,083	1,184	170	138	4,038	4,235	368	372
New Mexico	1,040	1,104	67	83	490	486	48	26	1,530	1,590	115	108
Arizona	892	1,003	72	64	943	1,072	153	137	1,835	2,074	225	201
Utah	556	555	53	43	182	188	19	18	738	743	72	61
Nevada	202	202	14	18	71	94	10	7	273	295	23	25
Washington	1,532	1,520	128	125	2,922	2,899	246	242	4,454	4,419	374	367
Oregon	795	801	66	65	1,695	1,718	153	114	2,490	2,519	219	180
California	5,055	5,355	523	450	13,179	12,755	1,347	669	18,234	18,110	1,870	1,119
Alaska	6	6	0	1	20	20	2	1	25	25	3	2
Hawaii	88	89	7	7	476	405	34	32	564	494	41	40
UNITED STATES	86,358	90,283	7,232	7,001	84,810	83,150	9,450	7,917	171,168	173,433	16,681	14,919

1/ Sales of farm products include receipts from commodities placed under nonrecourse CCC loans, plus additional gains realized on redemptions during the period. 2/ Estimates as of end of current month. Totals may not add because of rounding.

Information contact: Roger Strickland (202) 219-0806. To receive current monthly cash receipts via postal mail or e-mail contact Bob Dubman at (202) 219-0804.

Table 33.—Cash Receipts From Farming

	Annual						1993					1994
	1988	1989	1990	1991	1992	1993	Jan	Sept	Oct	Nov	Dec	Jan
	\$ million											
Farm marketings & CCC loans*	151,154	161,163	169,973	168,721	171,168	173,433	15,259	14,702	19,393	17,688	16,681	14,919
Livestock & products	79,434	84,122	89,843	86,780	86,358	90,283	6,869	7,653	8,587	7,671	7,232	7,001
Meat animals	46,492	46,857	51,911	51,089	48,427	51,353	3,855	4,541	5,239	4,237	3,706	3,855
Dairy products	17,641	19,396	20,149	18,037	19,848	19,619	1,580	1,499	1,578	1,599	1,934	1,686
Poultry & eggs	12,868	15,372	15,243	15,122	15,441	16,661	1,225	1,382	1,580	1,519	1,408	1,251
Other	2,433	2,498	2,540	2,531	2,642	2,650	209	231	190	316	183	210
Crops	71,720	77,040	80,130	81,942	84,810	83,150	8,390	7,048	10,806	10,017	9,450	7,917
Food grains	7,469	8,247	7,517	7,410	8,890	7,985	853	535	886	803	732	887
Feed crops	14,283	17,054	18,671	19,491	20,073	19,526	2,725	1,300	1,737	2,407	2,495	2,332
Cotton (lint & seed)	4,546	5,033	5,489	5,236	5,207	5,181	809	239	754	1,154	1,552	874
Tobacco	2,083	2,415	2,741	2,886	2,961	2,956	471	471	432	343	571	345
Oil-bearing crops	13,500	11,866	12,258	12,700	12,996	13,055	1,438	1,170	3,498	1,419	1,026	1,413
Vegetables & melons	9,818	11,596	11,449	11,552	11,436	11,631	775	1,196	1,157	640	574	714
Fruits & tree nuts	9,027	9,173	9,440	9,888	10,183	9,917	508	1,040	1,195	1,415	1,069	519
Other	10,993	11,657	12,566	12,778	13,065	12,899	811	1,096	1,147	1,837	1,430	833
Government payments	14,480	10,887	9,298	8,214	9,169	13,174	227	225	828	1667	1731	620
Total	165,582	171,914	179,218	175,506	179,338	186,607	15,486	14,927	20,221	19,355	18,412	15,539

* Sales of farm products include receipts from commodities placed under nonrecourse CCC loans, plus additional gains realized on redemptions during the period. — = not available.

Information contact: Roger Strickland (202) 219-0806. To receive current monthly cash receipts via mail contact Bob Dubman at (202) 219-0804.

Table 34.—Farm Production Expenses

	Calendar year									
	1985	1986	1987	1988	1989	1990	1991	1992 P	1993 F	1994 F
	\$ million									
Feed purchased	16,949	17,472	17,463	20,246	20,744	20,387	19,330	19,832	20,000	19,000 to 23,000
Livestock & poultry purchased	9,184	9,758	11,842	12,764	13,138	14,833	14,272	13,780	15,000	12,000 to 16,000
Seed purchased	3,128	3,188	3,259	4,062	4,400	4,521	5,119	4,918	5,000	4,000 to 6,000
Farm-origin inputs	29,261	30,418	32,564	37,071	38,281	39,742	38,722	38,531	40,000	39,000 to 43,000
Fertilizer & lime	7,512	6,820	6,453	7,681	8,177	8,210	8,671	8,340	8,000	7,000 to 11,000
Fuels & oils	6,436	5,310	4,957	4,800	4,772	5,790	5,599	5,311	5,000	4,000 to 7,000
Electricity	1,878	1,795	2,156	2,360	2,648	2,607	2,634	2,611	3,000	2,000 to 4,000
Pesticides	4,334	4,324	4,512	4,146	5,013	5,364	6,324	6,475	7,000	6,000 to 8,000
Manufactured inputs	20,159	18,249	18,078	18,987	20,610	21,971	23,229	22,736	23,000	22,000 to 26,000
Short-term interest	8,735	7,367	6,767	6,674	6,660	6,528	6,124	5,793	5,000	4,000 to 7,000
Real estate interest 1/	9,878	9,131	8,205	7,581	7,190	6,740	5,963	5,592	5,000	5,000 to 7,000
Total interest charges	18,613	16,498	14,972	14,255	13,850	13,268	12,088	11,385	11,000	10,000 to 14,000
Repair & maintenance 1/	6,370	6,426	6,759	7,717	8,407	8,553	8,630	8,469	9,000	8,000 to 10,000
Contract & hired labor	10,008	9,484	9,975	10,954	11,928	13,950	13,926	14,060	14,000	12,000 to 16,000
Machine hire & custom work	2,354	2,099	2,105	2,510	2,937	2,959	3,085	3,317	3,000	3,000 to 5,000
Marketing, storage, & transportation	4,127	3,652	4,078	3,516	4,206	4,211	4,719	4,542	4,000	4,000 to 6,000
Misc. operating expenses 1/ 2/	10,010	9,759	11,171	12,001	12,003	12,727	13,539	12,844	13,000	11,000 to 15,000
Other operating expenses	32,868	31,420	34,088	36,697	39,481	42,400	43,899	43,232	44,000	42,000 to 47,000
Capital consumption 1/	19,299	17,788	17,091	17,378	17,863	17,662	17,645	17,769	18,000	17,000 to 21,000
Taxes 1/	4,542	4,612	4,853	4,955	5,214	5,690	5,613	5,838	6,000	5,000 to 7,000
Net rent to nonoperator landlords	7,690	6,099	7,124	7,684	8,731	9,164	9,112	9,603	9,000	9,000 to 11,000
Other overhead expenses	31,531	28,499	29,069	30,016	31,807	32,517	32,370	33,210	33,000	33,000 to 36,000
Total production expenses	132,433	125,084	128,772	137,026	144,029	149,897	150,307	149,094	151,000	150,000 to 159,000

1/ Includes operator dwellings. 2/ Beginning in 1982, miscellaneous operating expenses include other livestock purchases, dairy assessments & feeding fees paid by nonoperators. Totals may not add because of rounding. P = preliminary. F = forecast.

Information contacts: Chris McGath (202) 219-0804, Robert McElroy (202) 219-0800.

Table 35.—CCC Net Outlays by Commodity & Function

	Fiscal year									
	1986	1987	1988	1989	1990	1991	1992	1993	1994 E	1995 E
	\$ million									
COMMODITY/PROGRAM										
Feed grains										
Corn	10,524	12,346	8,227	2,863	2,450	2,387	2,105	5,143	568	1,322
Grain sorghum	1,185	1,203	764	467	361	243	190	410	120	154
Barley	471	394	57	45	-93	71	174	186	191	132
Oats	26	17	-2	1	-5	12	32	16	7	4
Corn & oat products	5	7	7	8	8	9	9	10	11	0
Total feed grains	12,211	13,967	9,053	3,384	2,721	2,722	2,510	5,765	897	1,612
Wheat	3,440	2,836	678	53	806	2,958	1,719	2,185	1,806	1,924
Rice	947	906	128	631	667	867	715	887	820	314
Upland cotton	2,142	1,786	666	1,461	-79	382	1,443	2,239	1,670	1,160
Tobacco	253	-346	-453	-367	-307	-143	29	235	403	-183
Dairy	2,337	1,166	1,295	679	505	839	232	253	256	264
Soybeans	1,597	-476	-1,676	-86	5	40	-29	109	-147	-57
Peanuts	32	8	7	13	1	48	41	-13	97	32
Sugar	214	-65	-246	-25	15	-20	-19	-35	-24	-33
Honey	89	73	100	42	47	19	17	22	8	-4
Wool	123	152	1/ 5	93	104	172	191	179	198	137
Operating expense 3/	457	535	614	620	618	625	6	6	7	8
Interest expenditure	1,411	1,219	425	98	632	745	532	129	134	111
Export programs 4/	102	276	200	-102	-34	733	1,459	2,193	1,985	1,520
1989/95 Disaster/Tree/										
livestock assistance	0	0	0	3,919	2/ 161	121	1,054	944	2,702	1,000
Other	486	371	1,665	110	609	2	-162	949	1,306	1,192
Total	25,841	22,408	12,461	10,523	6,471	10,110	9,738	16,047	12,118	8,997
FUNCTION										
Price-support loans (net)	13,628	12,199	4,579	-926	-399	418	584	2,065	443	-71
Direct payments 5/										
Deficiency	6,166	4,833	3,971	5,798	4,178	6,224	5,491	8,607	4,347	4,733
Diversion	64	382	8	-1	0	0	0	0	0	0
Dairy termination	489	587	260	168	189	96	2	0	0	0
Loan Deficiency	27	60	0	42	3	21	214	387	423	9
Other	0	0	0	0	0	0	140	149	153	123
Disaster	0	0	6	4	0	0	0	0	0	0
Total direct payments	6,746	5,862	4,245	6,011	4,370	6,341	5,847	9,143	4,923	4,865
1988-95 crop disaster	0	0	0	3,386	2/ 5	6	960	872	2,646	1,000
Emergency livestock/tree/										
forage assistance	0	0	31	533	156	115	94	72	56	0
Purchases (net)	1,670	-479	-1,131	116	-48	646	321	525	484	203
Producer storage										
payments	485	832	658	174	185	1	14	9	35	23
Processing, storage,										
& transportation	1,013	1,659	1,113	659	317	394	185	136	120	115
Operating expense 3/	457	535	614	620	618	625	6	6	7	8
Interest expenditure	1,411	1,219	425	98	632	745	532	129	134	111
Export programs 4/	102	276	200	-102	-34	733	1,459	2,193	1,985	1,520
Other	329	305	1,727	-46	669	86	-264	897	1,285	1,223
Total	25,841	22,408	12,461	10,523	6,471	10,110	9,738	16,047	12,118	8,997

1/ Fiscal 1988 wool & mohair program outlays were \$130,635,000 but include a one-time advance appropriation of \$126,108,000, which was recorded as a wool program receipt by Treasury. 2/ Approximately \$1.5 billion in benefits to farmers under the Disaster Assistance Act of 1989 were paid in generic certificates in FY 90 & were not recorded directly as disaster assistance outlays. 3/ Does not include CCC Transfers to General Sales Manager. 4/ Includes Export Guarantee Program, Direct Export Credit Program, CCC Transfers to the General Sales Manager, Market Promotion Program, starting in fiscal 1991 & starting in fiscal 1992 the Export Guarantee Program - Credit Reform, Export Enhancement Program, Dairy Export Incentive Program, and Technical Assistance to Emerging Democracies. 5/ Includes cash payments only. Excludes generic certificates in FY 86-93. E = Estimated in the FY 1995 President's Budget which was released February 7, 1994 based on November/December, 1993 supply & demand estimates. Minus (-) indicates a net receipt (excess of repayments or other receipts over gross outlays of funds).

Information contact: Richard Pazdalski (202) 720-5148.

Food Expenditures

Table 36.—Food Expenditures

	Annual			1994			1994 year-to-date	
	1991 R	1992 R	1993 R	Jan R	Feb R	Mar P	Feb R	Mar P
\$ billion								
Sales 1/ Off-premise use 2/ Meals & snacks 3/	317.2 229.7	318.4 237.5	328.0 250.5	26.2 18.6	25.0 19.0	27.8 21.2	51.3 37.6	79.1 58.8
1993 \$ billion								
Sales 1/ Off-premise use 2/ Meals & snacks 3/	328.3 238.3	325.5 341.7	328.0 250.5	25.5 18.4	24.5 18.8	27.2 21.0	50.0 37.3	77.2 58.2
Percent change from year earlier (\$ bil.)								
Sales 1/ Off-premise use 2/ Meals & snacks 3/	4.3 3.1	0.4 3.4	3.0 5.5	2.4 -0.1	2.5 5.7	4.9 5.8	2.5 2.7	3.3 3.8
Percent change from year earlier (1993 \$ bil.)								
Sales 1/ Off-premise use 2/ Meals & snacks 3/	1.4 -0.3	-0.9 1.4	0.8 3.6	-1.3 -2.0	-0.5 3.9	2.0 3.9	-0.9 0.9	0.1 1.9

1/ Food only (excludes alcoholic beverages). Not seasonally adjusted. 2/ Excludes donations & home production. 3/ Excludes donations, child nutrition subsidies, & meals furnished to employees, patients, & inmates. R = revised. P = preliminary.

NOTE: This table differs from Personal Consumption Expenditures (PCE), table 2, for several reasons: (1) this series includes only food excluding alcoholic beverages & pet food which are included in PCE; (2) this series is not seasonally adjusted, whereas PCE is seasonally adjusted at annual rates; (3) this series reports sales only, but PCE includes food produced & consumed on farms & food furnished to employees; (4) this series includes all sales of meals & snacks. PCE includes only purchases using personal funds, excluding business travel & entertainment. For a more complete discussion of the differences, see "Developing an Integrated Information System for the Food Sector," Agr. Econ. Rpt. No. 575, Aug 1987.

Information contact: Alden Manchester (202) 219-0880.

Transportation

Table 37.—Rail Rates; Grain & Fruit-Vegetable Shipments

	Annual			1993					1994	
	1991	1992	1993	Feb	Sept	Oct	Nov	Dec	Jan	Feb
Rail freight rate index 1/ (Dec. 1984=100)										
All products	109.3	109.9	110.9	110.5	111.2	111.3	111.1 P	111.1 P	111.2 P	111.5 P
Farm products	111.4	111.1	113.7	113.4	113.3	114.6	115.0 P	114.7 P	115.1 P	114.5 P
Grain	111.2	111.4	114.7	114.4	114.2	115.8	116.3 P	115.8 P	116.4 P	115.6 P
Food products	108.1	108.7	108.8	108.7	108.7	109.8	108.5 P	108.5 P	108.5 P	110.2 P
Grain shipments										
Rail carloadings (1,000 cars) 2/	26.6	27.4	27.4	30.4	26.9 P	28.8 P	27.4 P	26.2 P	26.0 P	25.1 P
Barge shipments (mil. ton) 3/	3.3	3.4	2.4	1.7	3.6	3.5	3.0	2.8	1.5	1.7
Fresh fruit & vegetable shipments 4/ 5/										
Piggy back (mil. cwt)	1.5	1.6	1.4	1.4	1.4	1.0	1.5	1.2	1.2	1.1
Rail (mil. cwt)	2.1	2.6	2.2	2.2	1.3	1.7	2.6	2.8	2.4	2.0
Truck (mil. cwt)	41.9	44.0	44.8	39.2	37.9	42.6	41.6	42.7	42.0	37.3
Cost of operating trucks hauling produce 4/										
Fleet operation (cts./mile)	126.5	124.1	127.2	127.0	125.8	129.2	128.8	127.4	127.0	128.3

1/ Department of Labor, Bureau of Labor Statistics. 2/ Weekly average; from Association of American Railroads. 3/ Shipments on Illinois & Mississippi waterways, U.S. Corps of Engineers. 4/ Agricultural Marketing Service, USDA. 5/ Preliminary data for 1994. P = preliminary. — = not available.

Information contact: T.Q. Hutchinson (202) 219-0840.

Indicators of Farm Productivity

Table 38.—Indexes of Farm Production, Input Use & Productivity

	1983	1984	1985	1986	1987	1988	1989	1990	1991 1/	1992 2/
	1982=100									
Farm output	84	101	105	102	104	97	108	112	112	—
All livestock products	102	100	103	103	106	108	110	112	114	—
Meat animals	102	100	99	99	100	102	102	102	105	—
Dairy products	103	99	105	106	105	107	106	109	109	—
Poultry & eggs	100	103	108	112	122	125	130	138	144	—
All crops	71	100	106	99	101	88	105	112	109	—
Feed crops	31	108	125	119	101	63	116	113	113	—
Food grains	84	93	87	77	77	70	77	99	76	—
Oil crops	75	87	96	88	88	71	87	87	92	—
Cotton and cotton seed	68	111	113	83	127	133	103	138	140	—
Tobacco	75	89	77	58	61	69	71	83	85	—
Vegetables and melons	97	103	109	110	117	111	114	123	122	—
Fruits and nuts	100	100	99	95	109	117	111	113	105	—
Other crops	101	110	111	120	132	137	141	141	148	—
Farm input	96	98	95	92	89	87	87	89	89	—
Farm Labor	95	97	89	87	84	86	82	87	88	—
Farm real estate	92	97	97	94	91	90	91	90	89	—
Durable equipment	95	91	86	80	74	70	67	65	63	—
Energy	97	100	90	84	93	93	91	90	89	—
Agricultural chemicals	93	106	101	111	100	90	93	90	94	—
Feed, seed, and livestock purchases	99	101	106	105	101	98	99	105	104	—
Other purchased inputs	107	108	99	89	92	90	96	97	100	—
Farm output per unit of input	88	103	111	111	117	112	124	127	126	—
Output per unit of labor										
Farm 3/	88	104	118	117	123	114	131	129	127	—
Nonfarm 4/	102	105	106	108	109	110	109	109	110	114

1/ New data and methods were used to calculate the 1991 indexes and to revise them back to 1948. 2/ Preliminary. 3/ Economic Research Service.
4/ Bureau of Labor Statistics. — = not available.

Information contact: Rachel Evans (202) 219-0433.

Food Supply & Use

Table 39.—Per Capita Consumption of Major Food Commodities^{1/}

Commodity	1985	1986	1987	1988	1989	1990	1991	1992	1993 P
Pounds									
Red meats 2/3/4/	124.9	122.2	117.4	119.5	115.9	112.3	111.9	114.1	112.2
Beef	74.6	74.4	69.6	68.6	65.4	64.0	63.1	62.8	61.7
Veal	1.5	1.6	1.3	1.1	1.0	0.9	0.8	0.8	0.7
Lamb & mutton	1.1	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
Pork	47.7	45.2	45.6	48.8	48.4	46.4	46.9	49.5	48.7
Poultry 2/3/4/	45.2	47.1	50.7	51.7	53.6	56.0	58.0	60.0	61.2
Chicken	36.1	37.0	39.1	39.3	40.5	42.2	43.9	45.9	47.2
Turkey	9.1	10.2	11.6	12.4	13.1	13.8	14.1	14.2	14.0
Fish & shellfish 3/	15.0	15.4	16.1	15.1	15.6	15.0	14.8	14.7	—
Eggs 4/	32.9	32.6	32.7	31.6	30.4	30.1	30.0	30.2	—
Dairy products									
Cheese (excluding cottage) 2/5/	22.5	23.1	24.1	23.7	23.8	24.6	25.0	26.0	—
American	12.2	12.1	12.4	11.5	11.0	11.1	11.1	11.3	—
Italian	6.5	7.0	7.6	8.1	8.5	9.0	9.4	10.0	—
Other cheese 6/	3.9	4.0	4.1	4.1	4.3	4.6	4.6	4.7	—
Cottage cheese	4.1	4.1	3.9	3.9	3.6	3.4	3.3	3.1	—
Beverage milks 2/	229.7	228.6	226.5	222.4	224.3	221.7	221.2	218.5	—
Fluid whole milk 7/	123.4	116.5	111.9	105.7	97.6	90.4	87.4	84.1	—
Fluid lowfat milk 8/	93.7	98.6	100.6	100.5	106.5	108.4	109.9	109.4	—
Fluid skim milk	12.6	13.5	14.0	16.1	20.2	22.9	23.9	25.0	—
Fluid cream products 9/	6.7	7.0	7.1	7.1	7.3	7.1	7.3	7.5	—
Yogurt (excluding frozen)	4.1	4.4	4.4	4.7	4.3	4.1	4.2	4.3	—
Ice cream	18.1	18.4	18.4	17.3	16.1	15.8	16.3	16.4	—
Ice milk	6.9	7.2	7.4	8.0	8.4	7.7	7.4	7.1	—
Frozen yogurt	—	—	—	—	2.0	2.8	3.5	3.1	—
All dairy products, milk equivalent, milkfat basis 10/	593.8	591.5	601.3	582.9	565.2	569.7	565.2	564.6	—
Fats & oils — Total fat content	64.3	64.4	62.9	63.0	60.4	62.2	63.8	65.6	—
Butter & margarine (product weight)	15.7	16.0	15.2	14.8	14.6	15.3	14.8	15.2	—
Shortening	22.9	22.1	21.4	21.5	21.5	22.2	22.4	22.4	—
Lard & edible tallow (direct use)	3.7	3.5	2.7	2.6	2.1	2.5	3.1	4.1	—
Salad & cooking oils	23.5	24.2	25.4	25.8	24.0	24.2	25.2	25.6	—
Fresh fruits 11/	110.6	117.4	121.6	120.7	123.1	116.8	113.2	122.7	—
Canned fruit 12/	12.7	12.9	13.6	13.3	13.3	13.5	12.3	14.4	—
Dried fruit	2.9	2.7	3.1	3.3	3.2	3.6	3.1	3.2	—
Frozen fruit	3.3	3.6	3.9	3.8	4.6	4.3	3.9	4.7	—
Selected fruit juices 13/	66.9	65.0	70.0	64.7	67.0	59.6	63.8	59.6	—
Vegetables 11/									
Fresh	103.0	100.5	107.0	111.5	115.5	113.3	110.4	109.3	—
Canning	95.1	95.6	95.1	91.2	98.7	101.7	103.4	106.3	—
Freezing	19.6	18.5	19.3	21.1	20.7	20.5	21.6	20.8	—
Potatoes, all 11/	122.4	126.0	125.9	122.5	127.1	127.8	130.6	133.5	—
Sweetpotatoes 11/	5.4	4.4	4.4	4.1	4.1	4.6	4.0	4.3	—
Peanuts (shelled)	6.3	6.4	6.4	6.9	7.0	6.0	6.5	6.2	—
Tree nuts (shelled)	2.3	2.2	2.2	2.3	2.4	2.6	2.3	2.4	—
Flour & cereal products 14/	156.1	162.1	170.8	173.7	175.4	183.5	185.4	187.0	—
Wheat flour	124.7	125.7	130.0	130.0	129.6	135.8	136.5	138.3	—
Rice (milled basis)	9.0	11.6	14.0	14.3	15.2	16.2	16.8	16.8	—
Caloric sweeteners 15/	131.3	129.6	133.7	135.1	137.3	140.7	141.7	143.3	—
Coffee (green bean equiv.)	10.5	10.5	10.2	9.8	10.1	10.3	10.5	10.6	—
Cocoa (chocolate liquor equiv.)	3.7	3.8	3.8	3.8	4.0	4.3	4.6	4.6	—

1/ In pounds, retail weight unless otherwise stated. Consumption normally represents total supply minus exports, nonfood use, & ending stocks. Calendar-year data except fresh citrus fruits, peanuts, tree nuts, & rice, which are on crop-year basis. 2/ Totals may not add due to rounding. 3/ Boneless, trimmed weight. Chicken series revised to exclude amount of ready-to-cook chicken going to pet food as well as some water leakage that occurs when chicken is cut up before packaging. 4/ Excludes shipments to the U.S. territories. 5/ Whole & part-skim milk cheese. 6/ Natural equivalent of cheese & cheese products. 7/ Includes Swiss, Brick, Munster, cream, Neufchatel, Blue, Gorgonzola, Edam, & Gouda. 8/ Plain & flavored. 9/ Plain & flavored & buttermilk. 10/ Heavy cream, light cream, half & half, & sour cream & dip. 11/ Includes condensed & evaporated milk & dry milk products. 12/ Excludes pineapples & berries. 13/ Single strength equivalent. 14/ Includes rye, corn, oat, & barley products. Excludes quantities used in alcoholic beverages, corn sweeteners, & fuel. 15/ Dry weight equivalent. — = not available. P = preliminary.

Information contact: Judy Jones Putnam (202) 219-0862.

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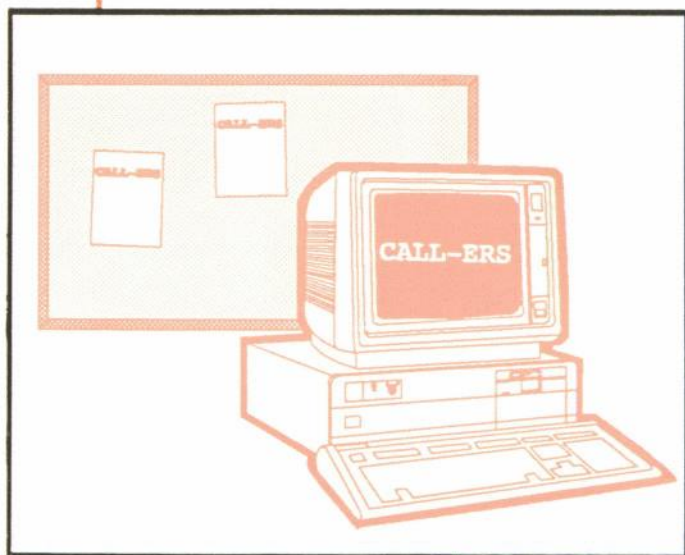
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