



Outlook for U.S. Agricultural Trade

FY 2011 Exports Expected to Rise to \$137 Billion; Imports to Rise to \$93 Billion

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The next release is
August 31, 2011

Approved by the
World Agricultural
Outlook Board.

Fiscal 2011 agricultural exports are forecast at a record \$137 billion, up \$1.5 billion from the February forecast and 26 percent (\$28.3 billion) above 2010. Oilseeds are unchanged as higher prices offset lower volumes. Grain exports are forecast down on lower volume due to increased competition for wheat. Cotton exports are forecast up slightly on strong second quarter shipments. Higher prices and strong Asian demand support increased pork and beef exports. Dairy products and animal by-products are also up. The forecast for China is raised \$1 billion to a record \$21 billion on strong soybean and cotton exports. The forecasts for the Middle East and North Africa are raised due to strong grain shipments, while South Korea is up on larger meat shipments.

Fiscal 2011 imports are forecast up \$5 billion from the February forecast to a record \$93 billion. Both volume and unit values are up year-to-date, indicating strong import demand. The largest increases are for canola oil, olive oil, and palm kernel oil. U.S. import demand is relatively high for products from Southeast Asia, South Asia, and North Africa. Compared with 2010, import values have grown more than 30 percent from these regions, reflecting strong demand for tropical oils, coffee, rubber, sugar, and tree nuts. Higher unit values for sugar, coffee, cocoa, and rubber reflect source country supply problems, smaller stocks, or greater global demand.

With imports expected to rise faster than exports, the trade surplus drops to \$44 billion, down \$3.5 billion from the February forecast, but still well above the 2008 record.

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

Item	2006	2007	2008	2009	2010	Forecast	
						fiscal 2011	
						Feb.	May
<i>Billion dollars</i>							
Exports	68.6	82.2	114.9	96.3	108.7	135.5	137.0
Imports	64.0	70.1	79.3	73.4	79.0	88.0	93.0
Balance	4.6	12.1	35.6	22.9	29.7	47.5	44.0

Reflects forecasts in the May 11, 2011, *World Agricultural Supply and Demand Estimates* report.

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

World Growth Solid; Inflation Up; Dollar Down

The world macroeconomic outlook for 2011 supports continued trade expansion, despite the growth slowdown from 2010 (table 2). World trade volume in 2010 rose 13.6 percent, exactly offsetting the decline in 2009. In 2011, world trade is expected to grow 6.8 percent. The Chinese and Indian economies have continued strong growth, bidding up commodity prices and providing direct and indirect boosts to U.S. farm and raw material exports in both price and volume terms. The current credit environment supports the financing of agricultural trade.

In 2011, world inflation is up and the dollar is down compared with 2010. Asian and Latin American central banks have continued to boost short-term interest rates to deal with rising inflation from higher industrial and agricultural commodity prices and, for some nations, tighter labor markets. The European Central Bank has modestly boosted interest rates to preempt renewed inflationary expectations. Higher rates of return elsewhere have discouraged holding U.S. assets, and the dollar has fallen as a result. This is likely to persist, as considerable slack in the U.S. economy holds down inflation and makes any tightening by the Fed unlikely until 2012.

The 2011 macroeconomic outlook is subject to uncertainty due to commodity price inflation and the European debt problem. A risk from inflation is that increases in short-term interest rates in emerging market economies may not only curb inflation, but also sharply curtail economic growth. Slower domestic demand growth in an emerging market country could slow trade growth and further curtail world GDP growth by the end of 2011. As world commodity and financial markets reflect continued concern about the European debt situation, concerns about world inflation will be increasingly important in the emerging market economies of Asia and Latin America. Crude oil prices have recently fallen, reflecting both the declining dollar and diminished concern about political changes in the Middle East affecting oil supply. Overall, financial and commodity markets, reflect the expectation that the world economic outlook for growth, particularly for Asia and Latin America, will be solid with inflation rising.

The dollar is weak, but its depreciation so far in 2011 has been slow and not disruptive. Interest rates are low, and most major world stock markets, despite recent retrenchment, show gains for the year reflecting expected solid world growth for the year. The recent downturns in U.S. stock prices reflect lower profit growth projections later in 2011 and into 2012. Input price increases are expected to partly offset productivity gains. U.S. economic growth prospects for 2011, although positive, appear more modest than expected earlier in 2011.

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

Region/country	Share of world	GDP		Real exchange rate 2/		CPI		
	GDP (2010)	2010	2011	2010	2011	2010	2011	
		Growth rate		Growth rate		Growth rate		
		<i>Percent</i>						
World	100.0	3.9	3.2	--	--	2.8	3.7	
NAFTA	30.6	2.9	2.7	-10.0	-7.1	1.7	2.8	
Canada	2.6	3.1	3.0	-10.0	-7.1	1.8	2.8	
United States	26.4	2.9	2.7	0.0	0.0	1.6	2.8	
Mexico	1.6	5.5	4.4	-8.7	-10.5	4.2	4.2	
Latin America + Caribbean	6.5	5.6	4.2	-6.9	-6.0	6.5	8.3	
Argentina	0.5	9.2	5.7	-3.4	2.3	10.5	11.6	
Brazil	2.4	7.5	4.4	-14.9	-10.7	5.0	6.0	
Europe	29.9	1.8	1.9	-2.6	8.0	2.1	2.5	
Asia and Oceania	26.6	6.8	4.6	-0.6	-3.6	2.8	3.3	
China	7.5	10.3	9.3	-2.5	-7.2	3.3	5.1	
Japan	8.7	3.9	0.0	-3.9	-6.0	-0.7	0.2	
Korea	2.0	6.2	4.0	-10.5	-8.0	2.8	3.6	
Indonesia	0.8	6.1	6.0	-18.3	-4.5	8.8	6.3	
Vietnam	0.1	6.9	6.5	-2.1	-3.5	6.6	7.3	
India	2.3	8.5	7.9	-14.2	-5.2	11.9	7.7	
Australia	1.6	2.7	2.5	-15.9	-15.3	2.9	3.2	
New Zealand	0.2	2.3	2.5	-13.7	-12.2	2.3	4.0	
Middle East	3.2	4.8	5.0	-5.1	2.3	8.1	8.2	
Turkey	0.8	8.9	5.5	-2.4	-2.3	8.6	5.8	
Africa	2.4	4.6	5.0	-4.6	-2.5	5.9	6.5	

1/ Real values have a 2005 base. 2/ Local currency per U.S. dollar.

Source: Compiled by ERS using data and forecasts from Global Insight, the IMF, and Oxford Economics.

Export Products

Fiscal 2011 grain and feed exports are forecast at \$38.8 billion, down \$100 million from the February forecast. A downward revision in wheat more than offsets higher corn, rice, and feed and fodder values. Wheat is reduced \$600 million to \$11.7 billion, mostly due to lower volume, reflecting expected competition from Australia and Canada in the last quarter. The forecast export value for coarse grains is increased \$300 million to \$14.7 billion. Corn value is boosted \$300 million as tight U.S. supplies and strong domestic demand more than offset renewed competition from Argentina, Brazil, and Ukraine. Feeds and fodders are up \$100 million, with distillers' dried grains (DDG) mostly unchanged. Key markets remain Canada, China, and Mexico. Sorghum exports are forecast down \$50 million to \$935 million due to higher domestic use and greater competition from Argentina and Australia. Rice exports are up \$100 million to \$2.3 billion due to strong sales to Sub-Saharan Africa and the Middle East.

The forecast for oilseeds and products is unchanged at \$30.2 billion. Higher soybean export unit values are expected to offset a 1-million-ton reduction in volume, leaving the forecast nearly unchanged at \$21.3 billion. Slowing imports by China, a result of accelerated early-season purchases leading to a build-up in stocks, is expected to curtail demand for U.S. soybeans in the latter half of the fiscal year. The soybean meal export forecast is reduced \$200 million on mostly lower unit values. The soybean oil export forecast is raised \$120 million in response to stronger-than-expected sales.

The 2011 cotton export forecast is raised \$200 million to \$9 billion, while volume is unchanged. Export unit values were raised slightly to reflect stronger-than-expected shipments during recent months when prices were at record high levels. Sales have slowed considerably, indicating that shipments will taper off soon.

The fiscal 2011 export forecast for livestock, poultry, and dairy is raised \$1.6 billion to a record \$26.5 billion. Beef and pork are raised a combined \$500 million on higher unit values and robust demand from Asia. The export forecast for dairy products is raised \$300 million due to greater-than-anticipated shipments of butterfat and cheese. Global demand remains strong and is expected to keep international prices at relatively high levels. Global economic recovery boosts hides and skins (specifically whole cattle hides) with the forecast raised \$150 million to \$2.9 billion. Poultry exports are raised \$100 million to \$4.9 billion on higher unit values despite slightly lower volumes.

The fiscal 2011 horticultural product export value is unchanged and forecast at a record \$25.0 billion. For most products, expanding exports are due primarily to higher unit values, a driving force over the last several years. Fiscal 2011 exports of sugar and tropical products are forecast at \$5.2 billion, up \$200 million, largely due to higher coffee prices.

Table 3--U.S. agricultural exports: Value and volume by commodity, 2010-11

Commodity	October - March		Fiscal year 2010	Forecast fiscal 2011	
	2010	2011		Feb.	May
VALUE	<i>-- Billion dollars --</i>				
Grains and feeds 1/	12.698	17.352	27.285	38.9	38.8
Wheat 2/	2.547	5.156	5.868	12.3	11.7
Rice	1.198	1.121	2.322	2.2	2.3
Coarse grains 3/	4.540	6.066	9.843	14.4	14.7
Corn	4.140	5.611	9.096	13.4	13.7
Feeds and fodders	2.614	3.125	5.580	6.2	6.4
Oilseeds and products 4/	18.956	21.788	25.369	30.2	30.2
Soybeans	13.790	16.634	16.945	21.2	21.3
Soybean meal 5/	2.649	2.071	3.795	3.6	3.4
Soybean oil	0.906	1.224	1.347	1.7	1.8
Livestock, poultry, and dairy	9.990	12.910	21.535	24.9	26.5
Livestock products	6.334	8.251	13.547	16.4	17.6
Beef and veal 6/	1.375	2.065	3.220	3.9	4.2
Pork 6/	1.889	2.307	3.927	4.7	4.9
Beef and pork variety meats 6/	0.474	0.594	1.000	1.1	1.2
Hides, skins, and furs	0.901	1.212	2.117	2.8	2.9
Poultry and products	2.269	2.590	4.619	4.8	4.9
Broiler meat 6/ 7/	1.494	1.665	3.012	3.1	3.2
Dairy products	1.387	2.068	3.369	3.7	4.0
Tobacco, unmanufactured	0.842	0.668	1.221	1.2	1.2
Cotton	2.048	5.483	4.758	8.8	9.0
Seeds	0.771	0.865	1.232	1.3	1.3
Horticultural products 8/	11.502	13.129	22.610	25.0	25.0
Fruits and vegetables, fresh	2.794	3.192	5.859	6.3	6.3
Fruits and vegetables, processed 8/	2.757	3.064	5.613	6.0	6.0
Tree nuts, whole and processed	2.505	3.072	4.060	4.7	4.7
Sugar and tropical products 9/	2.150	2.541	4.571	5.0	5.2
Major bulk products 10/	24.964	35.127	40.957	60.1	60.1
Total	58.997	74.873	108.664	135.5	137.0
VOLUME	<i>--- Million metric tons ---</i>				
Wheat 2/	11.293	16.304	25.848	36.4	34.8
Rice	2.134	2.093	4.279	4.2	4.3
Coarse grains 3/	24.712	23.469	54.091	54.1	52.3
Corn	22.425	21.649	49.833	50.0	48.5
Feeds and fodders	8.397	9.781	18.779	18.9	18.9
Soybeans	34.081	33.314	41.770	43.3	42.2
Soybean meal 5/	6.937	5.128	10.137	8.3	8.3
Soybean oil	1.036	1.073	1.523	1.3	1.5
Beef and veal 6/	0.326	0.423	0.715	0.8	0.9
Pork 6/	0.737	0.811	1.429	1.6	1.6
Beef and pork variety meats 6/	0.345	0.423	0.711	0.8	0.9
Broiler meat 6/ 7/	1.450	1.580	2.961	3.1	3.0
Tobacco, unmanufactured	0.126	0.105	0.184	0.2	0.2
Cotton	1.214	2.027	2.682	3.4	3.4
Major bulk products 10/	73.560	77.313	128.854	141.6	137.0

Total may not add due to rounding.

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

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

Regional Exports

Revised Outlook for Fiscal 2011

Agricultural exports are forecast up \$1.5 billion from February with \$1 billion of the increase coming in Asia and focused in China and South Korea. Exports to Canada, Mexico, and the EU are unchanged from February. The Middle East and North Africa are raised, due to very strong purchases from Egypt, Turkey, and Saudi Arabia.

Asia

Exports to China for the first half of fiscal 2011 totaled \$15 billion and comprised 20 percent of all U.S. exports. Shipments to China were 43 percent greater than shipments to Canada, which is the next largest market. Exports to China typically follow a strong seasonal pattern with shipments for the first half of the year reaching 70 percent or more of the annual total. The forecast is raised \$1 billion to a record \$21 billion due primarily to the strong pace of soybean and cotton shipments for the first half of the year. However, soybean exports should slow as China draws down stock levels.

No change was made to the forecasts for Japan and Hong Kong with exports to these countries for the first half of the fiscal year running 18 percent and 36 percent ahead of last year, but in line with the February forecasts. Exports to South Korea for the first half of the fiscal year were nearly \$1 billion above the same period last year with beef and pork exports more than double. The forecast is up \$300 million to a record \$6.5 billion due to strong cotton and meat shipments. Taiwan is lowered \$200 million, while the forecast for exports to Southeast Asia is reduced slightly with Vietnam down \$200 million on low soybean oil and meal exports. However, total exports to Vietnam are expected to reach a record high, in part due to strong cotton exports. Meanwhile, exports to Thailand are raised \$100 million, primarily due to cotton shipments.

Western Hemisphere

The forecasts for Canada and Mexico, the number two and three markets, are unchanged. The Dominican Republic is up \$200 million due to higher wheat and soybean oil exports. Exports to South America are raised \$400 million with Brazil, Columbia, and Peru up, while the forecast for Venezuela is revised down. Wheat, soybean oil, and cotton shipments to the region are up with October-March cotton exports 250 percent greater than the same period last fiscal year.

Europe, Africa, and the Middle East

The forecast for exports to the European Union is unchanged at \$10 billion, but is forecast \$1.5 billion greater than last year primarily due to increased grain and feed shipments. Exports to the Middle East are raised \$400 million, largely due to greater purchases from Turkey and Saudi Arabia. Meanwhile, the forecast for North Africa is raised \$300 million on increased exports to Egypt. With less competition from Black Sea supplies, U.S. wheat and corn shipments have soared, and are expected to continue strong for the second half of the fiscal year. The forecast for Sub-Saharan Africa is lowered by \$400 million as shipments of

horticultural products and grains and feeds (other than rice and wheat) have been lower than expected.

Table 4--U.S. agricultural exports: Value by region, 2010-11

Country and region 1/	October - March		Fiscal year 2010	Share of 2010 total Percent	Forecast fiscal 2011	
	2010	2011			Feb.	May
	-- \$ Billion --				-- \$ Billion --	
Asia	26.925	35.244	45.736	42.1	58.5	59.5
East Asia	22.075	29.167	36.932	34.0	46.2	47.3
Japan	5.776	6.817	11.228	10.3	13.0	13.0
China	10.676	15.119	15.070	13.9	20.0	21.0
Hong Kong	1.345	1.829	2.460	2.3	3.3	3.3
Taiwan	1.785	1.935	3.174	2.9	3.7	3.5
South Korea	2.486	3.452	4.982	4.6	6.2	6.5
Southeast Asia	4.064	5.053	7.325	6.7	10.1	10.0
Indonesia	1.171	1.565	2.130	2.0	2.7	2.7
Philippines	0.877	1.012	1.606	1.5	2.0	2.0
Malaysia	0.478	0.469	0.778	0.7	0.9	0.9
Thailand	0.643	0.947	1.082	1.0	1.5	1.6
Vietnam	0.654	0.784	1.230	1.1	1.8	1.6
South Asia	0.786	1.024	1.479	1.4	2.2	2.2
India	0.487	0.352	0.799	0.7	0.8	0.8
Western Hemisphere	19.766	23.125	40.408	37.2	47.8	48.4
North America	14.791	16.843	30.497	28.1	35.5	35.5
Canada	7.952	8.646	16.566	15.2	18.5	18.5
Mexico	6.839	8.197	13.932	12.8	17.0	17.0
Caribbean	1.645	1.746	3.124	2.9	3.5	3.7
Dominican Republic	0.525	0.658	0.957	0.9	1.0	1.2
Central America	1.368	1.795	2.720	2.5	3.5	3.5
South America	1.962	2.741	4.066	3.7	5.3	5.7
Brazil	0.215	0.478	0.527	0.5	0.8	1.0
Colombia	0.436	0.676	0.829	0.8	1.0	1.2
Peru	0.390	0.465	0.737	0.7	0.8	0.9
Venezuela	0.470	0.539	1.072	1.0	1.3	1.2
Europe/Eurasia	6.179	7.081	10.255	9.4	12.2	12.1
European Union-27 2/	5.220	6.000	8.511	7.8	10.0	10.0
Other Europe 3/	0.230	0.214	0.374	0.3	0.5	0.4
FSU-12 4/	0.728	0.867	1.370	1.3	1.7	1.7
Russia	0.572	0.747	1.044	1.0	1.4	1.4
Middle East	2.848	4.380	5.597	5.2	7.3	7.7
Turkey	1.050	1.709	2.012	1.9	2.7	2.9
Saudi Arabia	0.385	0.588	0.836	0.8	1.0	1.2
Africa	2.406	4.065	4.967	4.6	7.8	7.7
North Africa	1.354	2.799	2.787	2.6	4.7	5.0
Egypt	0.652	1.729	1.583	1.5	2.2	2.5
Sub-Saharan Africa	1.051	1.267	2.180	2.0	3.1	2.7
Nigeria	0.425	0.603	0.881	0.8	1.3	1.3
Oceania	0.691	0.735	1.385	1.3	1.5	0.2
Trans-shipments via Canada 5/	0.182	0.243	0.315	0.3	0.2	0.0
Total	58.997	74.873	108.664	100.0	135.5	137.0

Total may not add due to rounding.

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

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

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

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

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

New countries added this quarter include Vietnam, India, Dominican Republic, Peru, and Nigeria

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

Import Products

Shipments of U.S. agricultural imports in the first 6 months of fiscal year 2011 jumped 18 percent from the same period in 2010, from \$38.2 billion to \$45.2 billion. Higher import prices account for more than 13 percent of this jump, part of which is attributed to the dollar's 4-percent depreciation since September 2010. In price-adjusted terms, the dollar has declined 5 percent in value over the past 6 months. As a result of these recent developments, U.S. agricultural imports are projected to increase from \$79 billion in 2010 to \$93 billion in 2011—\$5 billion higher than February's \$88 billion estimate. Since import volume is expected to climb by 5 percent, import price inflation is anticipated at 13 percent for the year.

Household spending on food and beverages increased an average 3 percent quarterly since summer 2010 in price-adjusted terms. Supporting this healthy spending increase was a 4.4-percent boost in disposable personal income over the past year (through March 2011). The sharpest change is the projected \$6.4-billion surge in the value of imported tropical products from 2010 (sugar, coffee, cocoa, rubber). This is followed by the nearly \$4-billion expansion of horticulture imports, then by the \$2-billion leap in imported oilseed products, three-quarters of which are vegetable oils. And almost \$1 billion more imports are expected from livestock and dairy products, whose \$11.7 billion forecast for 2011 is unchanged from the previous estimate.

The \$6.4 billion projected increase of sugar and tropical products is principally due to the combined \$5.1 billion jump in imports of coffee and rubber. Coffee bean harvests have been weak in Brazil, Mexico, Colombia, and Kenya. Dry weather in South America and slow withdrawals from Government stocks are behind the coffee bean price hikes. Meanwhile, cocoa exports from the Ivory Coast have resumed—about 150,000 metric tons are to be shipped in May and June, much of them to the United States. The second largest supplier of cocoa beans, Indonesia, supplanted some of the embargoed shipments from the Ivory Coast. Import demand for Indonesian beans has risen due to their lower unit values.

A significant portion of the price surges for tropical products is due to speculation in the commodity futures markets. Supply disruptions due to bad weather, low yields, or smaller inventories trigger demand in commodity markets. Price volatility is also increasing hedging costs incurred by buyers, traders, and investors. The weakening U.S. dollar shifted demand toward higher-yielding investments, such as gold, silver, crude oil, and other commodities. Nevertheless, some commodity prices have started to fall recently as demand ebbed and stocks were released. Among these commodities are sugar, cocoa, coconut oil, palm oil, and rubber.

Sugar import unit values are up 35 percent year-to-date due to higher import demand as domestic sugar consumption is up, partly reflecting flat demand for corn-based sweeteners in the soft drink sector. The jump in rubber imports reflects the strong rebound of U.S. automobile production. Rubber prices are similarly inflated due to brisk global demand, in part stemming from China's auto industry. China is the world's largest rubber consumer—about 3 million metric tons a year. Supply problems have boosted natural rubber prices as well due to heavy rainfall in the producer countries, including Thailand and India.

For horticultural products, the largest percentage increases in import values are for processed fruits, fruit juices, and tree nuts. Concentrated orange juice prices have risen sharply due to bad harvests in Florida and China. At the same time, strong demand from Asian countries has pushed orange and apple juice prices higher. About \$600 million more of fresh fruit imports are expected in 2011—mainly bananas, berries, avocados, oranges, melons, and mangos. Among fresh vegetables, about \$400 million more is projected for imported tomatoes, peppers, onions, lettuce, and broccoli.

The biggest gains in import value this fiscal year have been seen in canola oil, olive oil, and palm kernel oil. Except for palm kernel oil, import volumes of these vegetable oils have increased from last year. Fast-rising orders for soybean and peanut oil are also boosting the import bill. Import unit values for tropical oils (coconut, palm, and palm kernel oils) are up sharply due to higher demand from Asian consumers and worldwide. In addition to the \$1.6 billion projected rise in the value of imported vegetable oils in 2011, imported oilseeds and other products are up an estimated \$400 million from 2010.

Cattle and beef supplies are tight due to significantly lower cattle inventories in North America. Import volume of processing beef has declined due to smaller cattle inventories worldwide and a weak dollar, both of which make imports more expensive. However, the supply of beef from Oceania is expected to increase as the year progresses, with more import shipments this summer. Beef import value is revised slightly upward to nearly \$3 billion as elevated prices outweigh lower import volumes which reflected tight exporter supplies and a weak dollar. Cattle imports are revised down to \$1.5 billion as lower-than-expected prices more than offset higher volumes. Imported cattle from Mexico continue to be strong, offsetting slower Canadian shipments. The price spread between U.S. and Mexican feeder cattle, combined with drought conditions in the Southwest, are stimulating shipments north of the border. Forecast import volume estimates for swine and pork are largely unchanged.

In value terms, 48 percent of import products were shipped between October and March of fiscal year 2010, and 52 percent arrived from April to September. Among the 20 major product groups, only 6 have more shipments that arrived during the first half of the fiscal year (i.e., roughly in the fall and winter)—cattle and calves, dairy products (cheese), fresh fruits and vegetables, cut flowers and nursery crops, and cocoa and chocolate. For the rest of the imported product groups, more than half of shipments arrived in the last half of the fiscal year. The product groups that split shipments (from 49 to 51 percent) between halves of fiscal year 2010 are grain products, processed vegetables, fruit juices, tree nuts, and wine. These seasonal shipment patterns generally hold each year and are taken into account when forecasting out-year import values. Nevertheless, changes in import prices, whether influenced by exchange-rate fluctuations or commodity price movements, can alter the distribution of imports between halves of the fiscal year or between seasons.

Table 5--U.S. agricultural imports: Value and volume by commodity, fiscal years 2010-11

Commodity	October - March		Fiscal year 2010	Forecast fiscal 2011	
	2010	2011		Feb.	May
	VALUE --- Billion dollars ---				
Livestock and dairy products	5.193	5.756	10.843	11.7	11.7
Livestock and meats	3.742	4.120	7.947	8.5	8.5
Cattle and calves	0.802	0.853	1.546	1.7	1.5
Swine	0.157	0.186	0.344	0.4	0.4
Beef and veal	1.231	1.256	2.851	2.9	3.0
Pork	0.531	0.634	1.162	1.3	1.3
Dairy products	1.237	1.385	2.417	2.7	2.7
Cheese	0.520	0.561	0.963	1.0	1.0
Grains and feed	3.664	4.035	7.484	8.0	8.2
Grain products	2.403	2.623	4.886	5.2	5.3
Oilseeds and products	2.470	3.409	5.269	6.1	7.3
Vegetable oils	1.729	2.471	3.784	4.3	5.4
Horticulture products	17.710	19.695	35.549	38.6	39.4
Fruits, fresh	3.503	3.805	6.803	7.4	7.4
Fruits, processed	1.519	1.976	3.276	3.8	4.2
Fruit juices	0.621	0.844	1.279	1.5	1.7
Nuts, whole and processed	0.650	0.810	1.332	1.5	1.7
Vegetables, fresh	2.916	3.145	5.180	5.7	5.6
Vegetables, processed	1.753	1.939	3.574	3.8	3.9
Wine	2.134	2.326	4.258	4.4	4.6
Malt beer	1.516	1.641	3.452	3.6	3.7
Essential oils	1.154	1.233	2.414	2.6	2.6
Cut flowers and nursery stock	0.746	0.792	1.441	1.6	1.5
Sugar and tropical products	8.489	11.496	18.317	22.0	24.7
Sweeteners and products	1.704	2.223	4.112	4.8	5.3
Confections	0.592	0.660	1.279	1.4	1.4
Cocoa and chocolate	2.398	2.267	4.239	4.4	4.0
Coffee beans and products	1.951	3.346	4.393	5.2	7.4
Rubber, natural	1.003	1.865	2.433	4.2	4.5
Other imports 1/	0.689	0.782	1.492	1.6	1.7
Total agricultural imports	38.216	45.173	78.953	88.0	93.0
VOLUME --- Million metric tons ---					
Wine 2/	0.491	0.513	0.972	1.1	1.0
Malt beer 2/	1.358	1.470	3.112	3.3	3.4
Fruit juices 2/	2.091	2.190	4.162	4.4	4.4
Cattle and calves 3/	1.237	1.274	2.251	2.1	2.3
Swine 3/	2.918	2.867	5.805	5.8	5.8
Beef and veal	0.371	0.302	0.804	0.8	0.7
Pork	0.184	0.182	0.374	0.4	0.4
Fruits, fresh	4.525	4.619	9.128	9.4	9.3
Fruits, processed	0.643	0.712	1.408	1.5	1.6
Vegetables, fresh	3.117	3.124	5.375	5.6	5.4
Vegetables, processed	1.443	1.535	2.927	3.1	3.1
Vegetable oils	1.602	1.765	3.456	3.6	3.8
Cocoa and chocolate	0.710	0.668	1.242	1.3	1.2
Coffee beans	0.589	0.715	1.276	1.5	1.6
Sugar, cane and beet	1.174	1.416	3.010	---	3.6

Totals may not add due to rounding. --- Not previously forecast

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

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

Regional Imports

Both U.S. import volume and import unit values are up year to date, indicating that import demand is strong. The regions where U.S. import demand is relatively high include Southeast Asia, South Asia, and North Africa. Import values have grown more than 30 percent thus far from these regions compared with 2010, reflecting strong demand for tropical oils, coffee, rubber, sugar, and tree nuts. Among major supplying countries, import demand was strongest from Malaysia, Indonesia, Colombia, Brazil, Argentina, India, China, and Thailand. Close to a quarter of U.S. agricultural import value was supplied by these countries in 2010.

Since 2002, the major product groups with the highest average growth in import value are tropical oils, sugar, fresh and processed fruits and vegetables, processed grains, and other vegetable oils. Much of these imports were shipped from developing countries. Among these major developing suppliers are Malaysia, Ivory Coast, China, Indonesia, Thailand, Brazil, Mexico, India, and Chile. These countries are largely in Asia and Latin America, which together supplied 52 percent of U.S. import value in 2010, up from 50 percent in 2009 and 48 percent in 2008. This means that the import share from the developed countries—Canada, the European Union, and Oceania—is declining. From 49 percent in 2008, these developed regions' agricultural exports to the United States dropped to 44 percent in 2010. The import share from Africa and the Middle East climbed from 3 percent in 2008 to 4 percent in 2010.

Table 6--U.S. agricultural imports: Value by region, fiscal years 2010-11

Region and country	October - March		Fiscal year 2010	Share of 2010 total	Forecast fiscal 2011	
	2010	2011			Feb.	May
VALUE	<i>--- Billion dollars ---</i>			<i>Percent</i>	<i>--- Billion dollars ---</i>	
Western Hemisphere	20.989	24.899	42.883	54.3	49.0	50.8
Canada	7.450	8.474	15.682	19.9	17.7	17.8
Mexico	6.391	7.814	12.972	16.4	15.4	15.9
Central America	1.719	2.069	3.763	4.8	3.9	4.5
Costa Rica	0.570	0.663	1.248	1.6	1.5	1.4
Guatemala	0.632	0.758	1.381	1.7	1.4	1.7
Other Central America	0.517	0.648	1.134	1.4	1.1	1.4
Caribbean	0.260	0.265	0.577	0.7	0.6	0.6
South America	5.170	6.275	9.889	12.5	11.5	12.0
Argentina	0.516	0.668	1.088	1.4	1.3	1.4
Brazil	1.295	1.648	2.644	3.3	3.5	3.4
Chile	1.343	1.359	2.274	2.9	2.3	2.3
Colombia	0.916	1.290	1.854	2.3	2.2	2.6
Other South America	1.099	1.311	2.029	2.6	2.2	2.3
Europe and Eurasia	7.405	8.132	14.989	19.0	15.3	16.4
European Union-27 1/	6.969	7.656	14.152	17.9	14.5	15.5
Other Europe	0.403	0.443	0.774	1.0	0.8	0.8
Asia	6.320	8.391	14.055	17.8	16.8	18.5
East Asia	2.032	2.482	4.363	5.5	4.9	5.2
China	1.470	1.865	3.210	4.1	3.7	4.0
Other East Asia	0.562	0.617	1.153	1.5	1.2	1.2
Southeast Asia	3.565	4.955	8.052	10.2	9.8	11.2
Indonesia	1.211	1.703	2.631	3.3	3.5	3.7
Malaysia	0.620	1.015	1.604	2.0	2.1	2.6
Thailand	0.902	1.140	1.917	2.4	2.2	2.4
Other Southeast Asia	0.832	1.097	1.900	2.4	2.1	2.5
South Asia	0.723	0.954	1.640	2.1	2.0	2.1
India	0.658	0.860	1.498	1.9	1.8	1.9
Oceania	1.824	1.937	4.052	5.1	4.0	4.2
Australia	1.071	1.055	2.319	2.9	2.2	2.2
New Zealand	0.691	0.831	1.624	2.1	1.8	1.9
Africa	1.265	1.328	2.222	2.8	2.3	2.3
Sub-Sahara	1.132	1.149	1.947	2.5	2.0	2.0
Ivory Coast	0.685	0.568	0.908	1.1	0.7	0.7
Middle East	0.412	0.486	0.753	1.0	0.7	0.9
Turkey	0.242	0.305	0.422	0.5	0.4	0.5
World total	38.216	45.173	78.953	100.0	88.0	93.0

Totals may not add due to rounding.

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

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

Reliability Tables

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

Commodity	Average forecast errors Fiscal 2005-10					Forecast accuracy Fiscal 2005-10					Forecast accuracy
	Aug ¹	Nov	Feb	May	Aug ²	Aug ¹	Nov	Feb	May	Aug ²	
Export value	<i>Percent</i>					<i>"X" if error < 5%</i>					<i>Percent</i>
Grains and feeds	17	11	8	5	2	-	-	-	X	X	40
Wheat	21	17	15	9	6	-	-	-	-	-	0
Rice	11	15	14	9	4	-	-	-	-	X	20
Coarse grains	24	11	8	3	2	-	-	-	X	X	40
Corn	23	11	8	3	2	-	-	-	X	X	40
Feeds and fodders	15	11	9	6	3	-	-	-	-	X	20
Oilseeds and products	17	16	10	5	2	-	-	-	X	X	40
Soybeans	19	16	11	6	3	-	-	-	-	X	20
Soybean meal	27	24	15	11	3	-	-	-	-	X	20
Soybean oil	34	27	20	6	5	-	-	-	-	X	20
Livestock, poultry, and dairy	17	12	8	5	2	-	-	-	X	X	40
Livestock products	15	10	6	4	1	-	-	-	X	X	40
Beef and veal	19	14	8	10	5	-	-	-	-	X	20
Pork	17	9	8	6	4	-	-	-	-	X	20
Beef and pork variety meats	23	18	12	7	8	-	-	-	-	-	0
Hides, skins, and furs	18	15	12	8	3	-	-	-	-	X	20
Poultry and products	12	11	12	7	5	-	-	-	-	X	20
Broiler meat	13	14	12	8	4	-	-	-	-	X	20
Dairy products	34	25	18	10	4	-	-	-	-	X	20
Tobacco, unmanufactured	5	7	3	6	3	X	-	X	-	X	60
Cotton	26	17	9	6	1	-	-	-	-	X	20
Seeds	11	7	7	5	1	-	-	-	X	X	40
Horticultural products	6	6	3	2	1	-	-	X	X	X	60
Fruits and preparations	6	6	4	3	1	-	-	X	X	X	60
Vegetables and preparations	10	8	6	6	4	-	-	-	-	X	20
Tree nuts, whole/processed	12	10	5	3	3	-	-	X	X	X	60
Sugar and tropical products	8	7	5	3	1	-	-	X	X	X	60
Major bulk products	16	10	8	4	2	-	-	-	X	X	40
Total agricultural exports	14	9	6	4	1	-	-	-	X	X	40
Average error and accuracy	17	13	9	6	3	3%	0%	17%	45%	93%	32
Export volume											
Wheat	11	10	11	7	4	-	-	-	-	X	20
Rice	12	13	10	4	3	-	-	-	X	X	40
Coarse grains	8	5	5	3	2	-	X	X	X	X	80
Corn	8	6	6	4	2	-	-	-	X	X	40
Feeds and fodders	12	15	8	6	4	-	-	-	-	X	20
Soybeans	12	12	8	4	2	-	-	-	X	X	40
Soybean meal	16	12	10	5	4	-	-	-	X	X	40
Soybean oil	26	19	17	5	8	-	-	-	X	-	20
Beef and veal	13	18	8	3	0	-	-	-	X	X	40
Pork	18	8	11	5	3	-	-	-	X	X	40
Beef and pork variety meats	19	9	9	3	8	-	-	-	X	-	20
Broiler meat	9	9	7	7	3	-	-	-	-	X	20
Tobacco, unmanufactured	0	0	0	0	0	X	X	X	X	X	100
Cotton	17	12	8	3	2	-	-	-	X	X	40
Major bulk products	4	3	4	2	1	X	X	X	X	X	100
Average error and accuracy	12	10	8	4	3	13%	20%	20%	80%	87%	44

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

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

Country/region	Average forecast errors Fiscal 2005-10					Forecast accuracy Fiscal 2005-10					Forecast accuracy
	Aug ¹	Nov	Feb	May	Aug ²	Aug ¹	Nov	Feb	May	Aug ²	
Export value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					
Asia	18	11	10	6	1	-	-	-	-	X	20
East Asia	17	10	11	5	2	-	-	-	X	X	40
Japan	14	6	6	5	3	-	-	-	X	X	40
China	17	19	18	5	6	-	-	-	X	-	20
Hong Kong	21	14	13	9	2	-	-	-	-	X	20
Taiwan	19	10	8	7	4	-	-	-	-	X	20
South Korea	30	18	14	10	3	-	-	-	-	X	20
Southeast Asia	22	21	15	13	5	-	-	-	-	X	20
Indonesia	28	17	11	10	5	-	-	-	-	X	20
Philippines	28	21	12	4	6	-	-	-	X	-	20
Malaysia	14	8	13	10	3	-	-	-	-	X	20
Thailand	21	24	15	10	0	-	-	-	-	X	20
South Asia	25	18	17	13	8	-	-	-	-	-	0
Western Hemisphere	12	7	5	3	1	-	-	X	X	X	60
North America	11	6	4	2	1	-	-	X	X	X	60
Canada	10	6	3	2	1	-	-	X	X	X	60
Mexico	14	7	6	4	3	-	-	-	X	X	40
Caribbean	12	10	7	5	4	-	-	-	X	X	40
Central America	12	9	6	6	2	-	-	-	-	X	20
South America	29	15	13	10	7	-	-	-	-	-	0
Brazil	38	15	25	16	7	-	-	-	-	-	0
Colombia	27	18	9	7	7	-	-	-	-	-	0
Venezuela	28	25	12	6	11	-	-	-	-	-	0
Europe and Eurasia	20	9	6	6	3	-	-	-	-	X	20
European Union-27	22	10	9	8	3	-	-	-	-	X	20
Other Europe	36	39	42	42	31	-	-	-	-	-	0
FSU-12	22	21	16	11	11	-	-	-	-	-	0
Russia	22	20	16	17	11	-	-	-	-	-	0
Middle East	23	15	10	8	4	-	-	-	-	X	20
Turkey	29	20	15	11	8	-	-	-	-	-	0
Saudi Arabia	20	14	10	13	7	-	-	-	-	-	0
Africa	29	16	8	7	3	-	-	-	-	X	20
North Africa	50	25	11	11	7	-	-	-	-	-	0
Egypt	33	19	15	14	7	-	-	-	-	-	0
Sub-Saharan	14	11	6	8	7	-	-	-	-	-	0
Oceania	16	18	14	6	4	-	-	-	-	X	20
Transshipments via Canada	46	42	42	25	31	-	-	-	-	-	0
Average error and accuracy	23	16	13	10	6	0%	0%	8%	24%	57%	18

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

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

Commodity	Average forecast errors Fiscal 2005-10					Forecast accuracy Fiscal 2005-10					Forecast accuracy
	Aug ¹	Nov	Feb	May	Aug ²	Aug ¹	Nov	Feb	May	Aug ²	
Import value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Livestock, dairy, and poultry	9	3	4	4	2	-	X	X	X	X	80
Livestock and red meats	9	5	3	5	4	-	X	X	X	X	80
Cattle and calves	22	8	11	5	1	-	-	-	X	X	40
Swine	20	19	13	11	7	-	-	-	-	-	0
Beef and veal	12	7	5	5	2	-	-	X	X	X	60
Pork	9	10	8	8	2	-	-	-	-	X	20
Dairy products	13	8	7	8	4	-	-	-	-	X	20
Cheese	14	9	5	3	3	-	-	X	X	X	60
Grains and feed	10	7	7	4	2	-	-	-	X	X	40
Grain products	5	5	5	2	1	X	X	X	X	X	100
Oilseeds and products	22	14	16	9	4	-	-	-	-	X	20
Vegetable oils	20	12	18	17	8	-	-	-	-	-	0
Horticulture products	4	5	3	2	1	X	X	X	X	X	100
Fruits and preps., and juices	9	9	4	2	11	-	-	X	X	-	40
Fruits, fresh or frozen	26	17	8	5	2	-	-	-	X	X	40
Fruit juices	23	21	15	8	3	-	-	-	-	X	20
Nuts--whole and processed	11	8	7	7	3	-	-	-	-	X	20
Vegetables and preparations	5	6	8	2	0	X	-	-	X	X	60
Vegetables, fresh or frozen	4	3	2	3	1	X	X	X	X	X	100
Wine	6	5	2	2	1	-	X	X	X	X	80
Malt beer	6	4	4	3	3	-	X	X	X	X	80
Essential oils	12	8	7	3	1	-	-	-	X	X	40
Cut flowers & nursery stock	7	6	3	2	1	-	-	X	X	X	60
Sugar and tropical products	7	10	10	7	4	-	-	-	-	X	20
Cane and beet sugar	37	40	31	13	11	-	-	-	-	-	0
Confections	8	7	3	3	2	-	-	X	X	X	60
Cocoa and chocolate	9	7	11	4	3	-	-	-	X	X	40
Coffee beans and products	11	10	6	2	3	-	-	-	X	X	40
Rubber--natural	24	23	29	24	10	-	-	-	-	-	0
Total agricultural imports	6	4	3	3	1	-	X	X	X	X	80
Average error and accuracy	12	10	9	6	3	13%	26%	42%	65%	81%	47
Import volume											
Wine (HL)	10	8	3	3	2	-	-	X	X	X	60
Malt beer (HL)	11	5	3	4	3	-	X	X	X	X	80
Fruit juices (HL)	2	10	5	10	4	X	-	X	-	X	60
Cattle and calves	12	5	15	7	5	-	X	-	-	X	40
Swine	7	4	6	4	1	-	X	-	X	X	60
Beef and veal	19	18	10	6	2	-	-	-	-	X	20
Pork	6	6	13	13	6	-	-	-	-	-	0
Fruits--fresh	5	4	4	5	1	X	X	X	X	X	100
Fruits--processed	10	4	5	3	3	-	X	X	X	X	80
Vegetables--fresh	4	5	5	5	1	X	X	X	X	X	100
Vegetables--processed	9	7	3	3	0	-	-	X	X	X	60
Vegetable oils	7	5	8	8	3	-	X	-	-	X	40
Cocoa and chocolate	13	9	11	6	7	-	-	-	-	-	0
Coffee beans	9	5	5	3	4	-	X	X	X	X	80
Rubber--natural	21	15	13	16	9	-	-	-	-	-	0
Average error and accuracy	10	7	7	6	3	20%	53%	53%	53%	80%	52

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

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

Country/region	Average forecast errors Fiscal 2005-10					Forecast accuracy Fiscal 2005-10					Forecast accuracy
	Aug ¹	Nov	Feb	May	Aug ²	Aug ¹	Nov	Feb	May	Aug ²	
Import value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Western Hemisphere	5	4	3	3	1	X	X	X	X	X	80
Canada	13	8	6	5	2	-	-	-	X	X	40
Mexico	5	5	4	3	2	X	X	X	X	X	80
Central America	3	3	5	4	0	X	X	X	X	X	80
Costa Rica	13	12	7	7	3	-	-	-	-	X	20
Guatemala	6	5	8	9	3	-	X	-	-	X	40
Other Central America	18	10	10	11	5	-	-	-	-	X	20
Caribbean	27	8	8	11	0	-	-	-	-	X	20
South America	4	3	4	3	2	X	X	X	X	X	80
Argentina	36	9	17	13	13	-	-	-	-	-	0
Brazil	4	4	4	4	2	X	X	X	X	X	80
Chile	5	5	7	5	3	X	X	-	X	X	60
Colombia	2	4	5	2	2	X	X	X	X	X	80
Other South America	17	7	3	2	1	-	-	X	X	X	60
Europe and Eurasia	8	4	3	2	1	-	X	X	X	X	80
European Union-27	8	5	2	2	1	-	X	X	X	X	80
Other Europe	21	27	23	15	8	-	-	-	-	-	0
Asia	11	9	10	8	4	-	-	-	-	X	20
East Asia	8	9	6	3	3	-	-	-	X	X	40
China	10	10	6	3	3	-	-	-	X	X	40
Other East Asia	3	5	7	3	5	X	X	-	X	X	60
Southeast Asia	12	11	14	10	5	-	-	-	-	X	20
Indonesia	19	16	18	14	8	-	-	-	-	-	0
Malaysia	13	6	30	29	13	-	-	-	-	-	0
Thailand	11	11	14	11	4	-	-	-	-	X	20
Other Southeast Asia	14	11	10	3	0	-	-	-	X	X	40
South Asia	13	6	13	10	4	-	-	-	-	X	20
India	12	6	12	10	6	-	-	-	-	-	0
Oceania	8	4	8	7	3	-	X	-	-	X	40
Australia	10	7	7	5	3	-	-	-	X	X	40
New Zealand	11	6	10	12	6	-	-	-	-	-	0
Africa	6	10	14	6	6	-	-	-	-	-	0
Sub-Sahara	7	5	15	6	5	-	X	-	-	X	40
Ivory Coast	13	9	24	10	9	-	-	-	-	-	0
Middle East	9	5	5	0	4	-	X	X	X	X	80
Turkey	16	12	12	4	4	-	-	-	X	X	40
Average error and accuracy	11	8	10	7	4	22%	39%	28%	50%	78%	39

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

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Related Websites

Outlook for U.S. Agricultural Trade

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

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

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

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

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