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*Electronic Outlook Report from USDA's  
Economic Research Service and Foreign Agricultural Service*

## Outlook for U.S. Agricultural Trade

### FY 2015 Exports Forecast Down \$11 Billion From Record; Imports at a Record \$119 Billion

Fiscal 2015 agricultural exports are forecast at \$141.5 billion, down \$2.0 billion from the November forecast and \$11.0 billion from fiscal 2014. Most of the decline from the last forecast is a result of lower exports of high-value products (non-bulk), especially livestock, poultry and dairy, as well as horticultural products. The forecast for livestock, poultry and dairy is down \$1.9 billion on lower expected exports of pork, poultry, dairy and hides and skins. Exports of horticultural products are lowered \$1.0 billion primarily due to smaller-than-expected shipments of tree nuts and fresh fruits and vegetables. Cotton exports are unchanged this month. Oilseed exports are raised \$1.2 billion due to very strong sales and shipments of soybeans and soybean meal. The grain and feed export forecast is unchanged, as higher coarse grain exports offset lower wheat and rice exports.

U.S. agricultural imports are forecast at a record \$119.0 billion, up \$3.0 billion from November, and \$10.0 billion higher than in fiscal 2014.

The U.S. agricultural trade surplus is forecast at \$22.5 billion, down from \$43.3 billion in fiscal 2014, and the smallest surplus since fiscal 2007.

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The next release is  
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Table 1--U.S. agricultural trade, fiscal years 2009-15, year ending September 30

Item	2009	2010	2011	2012	2013	2014	Forecast fiscal year	
							2015	
							Nov.	Feb.
	<i>Billion dollars</i>							
Exports	96.3	108.5	137.5	135.9	141.0	152.5	143.5	141.5
Imports	73.4	79.0	94.5	103.4	103.9	109.2	116.0	119.0
Balance	22.9	29.6	43.0	32.5	37.1	43.3	27.5	22.5

Reflects forecasts in the February 10, 2015, *World Agricultural Supply and Demand Estimates* report.

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

Approved by the  
World Agricultural  
Outlook Board.

### *Dollar Up Sharply, Oil Prices Down, World Growth Up in 2015*

World economic growth is expected to accelerate from 2.6 percent in 2014 to 3.1 percent in 2015, driven by faster economic growth in North America and continued solid growth in Developing Asia. The JP Morgan real effective dollar index averaged 99 in January 2015—a level last exceeded in April 2003. The real dollar in 2015 is expected to rise by more than 6 percent over 2014—the fastest appreciation since 1997. Since August, the dollar has appreciated significantly in the largest U.S. agricultural export markets. For example, it has appreciated almost 13 percent against the euro and 15 percent against the yen. The dollar has also strengthened relative to other competitors, by 15 percent against the Brazilian real and 12 percent against the Canadian dollar. Notably, the dollar's value is expected to fall 3.4 percent in real terms relative to the Argentine peso in 2015, based on recent trends.

The dollar's appreciation of recent months reflects the relatively strong and stable U.S. economy and expected central bank policies over the next year. Political instability along with economic weakness and uncertainty due to geopolitical events in Europe, Japan, China and Latin America makes the United States a relatively attractive destination for investors around the world, increasing the value of the dollar. Recent interest rate cuts in many countries add to the attractiveness of the United States as a destination for financial and business investment. These trends are expected to continue, and along with increases in U.S. interest rates expected in late 2015, support our forecast of continued dollar strength through 2015.

The dollar's strength is expected to be a significant damper on U.S. export growth into 2015. Movements in exchange rates are a leading driver of movements in U.S. exports, since they are a key determinant of the relative price of U.S. agricultural products in global markets. ERS research has demonstrated that, while long-term growth in agricultural exports is largely driven by growth in foreign income, changes in exchange rates are the primary factors determining year-to-year variation in exports. While the dollar value is high relative to recent history, it remains well below the highs of the early 2000's. After a period of relatively consistent strengthening beginning in the early 1990's, the agricultural trade-weighted dollar depreciated more than 20 percent between 2002 and 2011, supporting record agricultural export growth between 2010 and 2013. However, lower energy prices and stronger world growth will mitigate the impact of a strengthening dollar on U.S. agriculture.

Higher North American and Iraqi supplies are principally responsible for the downward pressure on oil prices in 2014. The expansion in North American oil supply leading to the recent sharp drop in crude oil prices is likely to continue at a slower pace into 2015. Due to bottlenecks in the U.S. energy refining and transport system, U.S. prices for crude oil and natural gas are expected to continue to be below world levels in 2015. The U.S. energy infrastructure situation and stronger dollar is expected to provide U.S. oil refiners, farmers, manufacturers, fertilizer producers, and farm product exporters a lower cost environment in 2015. Due to improved world growth and low energy and commodity prices overall, global trade volume is forecasted to grow about 4 percent in 2015. Low U.S. energy costs, expanding international trade, and improved world growth are expected to mute the

overall domestic economic impact of falling U.S. agricultural exports in 2015. Brent crude oil peaked in June at \$112 per barrel falling to \$63 in December. The futures market for Brent crude implies that the 2015 average crude price will be lowest since 2005.

Gross domestic product (GDP) in Asia and Oceania minus Japan is expected to grow over 5 percent in 2015. Japan and Europe are expected to avoid recession and deflation as easing credit conditions support domestic demand and export expansion. China's structural reforms to enhance long-term growth—such as those underway in banking—will slow growth to 6.5 percent in 2015. Loosening credit, low oil prices, and a weak yuan will slow the effective pace of reform but support 2015 GDP growth. India will likely get a large boost from low oil prices enabling them to surpass China's growth rate in late 2015. For both economies, the reforms to reorient industrial production and services to serve domestic consumers will have no net impact on 2015's GDP. Growth in the rest of South and Southeast Asia is expected to also be strong in 2015 despite widespread potential medium term problems with debt and inflation.

Overall, economic growth in North America is projected to improve through 2015. In the United States, strong labor market indicators in late 2014 and early 2015 point to more jobs and rising wages through 2015, lifting consumer spending. As a result, both housing and business investment will respond favorably. Business and consumer credit conditions are expected to continue to ease, even as short-term interest rates are likely to rise modestly in late 2015. A stronger U.S. economy in 2015 boosts the growth environment for Canadian and Mexican exports. Lower oil and commodity prices in 2015 should moderate the gains in these economies from higher export volumes as oil and gas revenues fall in 2015. The recessions in Argentina, Brazil and Venezuela will slow growth in South America in 2015. Europe is expected to grow faster in 2015 as consumer and business spending modestly recovers. However, the expected 1.7-percent growth in 2015 is still a drag on world growth.

Expected strong U.S. growth—and the associated rising imports—and falling oil prices provide insurance against a world recession in 2015. Nevertheless, a debt default by Greece or a spillover of current geopolitical events to neighboring countries could trigger a world growth slowdown and a sharp rise in the dollar, hurting U.S. farm exports. A large emerging economy such as Venezuela defaulting on its debt would likely cause significant capital outflows out of other countries. Global growth would slow due to effects on world trade and financial markets and a flight to the safety of the dollar.

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

Region/country	World GDP share (2012)	GDP growth		Real exchange rate growth 2/		Inflation	
		2014	2015	2014	2015	2014	2015
				<i>Percent</i>			
World (U.S. trade-weighted)	100.0	2.6	3.1	1.6	6.1	2.5	2.1
NAFTA	27.0	2.4	3.2	0.8	1.0	1.9	1.4
Canada	2.5	2.5	2.4	7.0	6.1	1.9	1.2
United States	22.9	2.4	3.3	0.0	0.0	1.7	1.2
Mexico	1.7	2.2	3.3	1.8	6.7	4.0	3.7
South America	6.0	1.5	0.7	3.6	9.7	8.3	8.8
Argentina	0.8	-0.6	-1.2	16.9	-3.4	28.6	31.5
Brazil	3.3	0.0	0.1	4.3	9.9	6.3	6.6
Chile	0.3	1.6	2.9	12.3	4.6	4.2	3.7
Colombia	0.5	4.5	4.3	5.8	10.1	2.9	3.4
Venezuela	0.6	-4.0	-4.6	-20.7	25.8	62.0	66.4
Europe	28.7	1.2	1.7	NA	NA	1.4	1.8
Eurozone	16.8	0.9	1.5	1.4	15.4	0.4	0.1
United Kingdom	3.4	2.6	2.9	-5.2	5.2	1.5	0.5
Asia and Oceania	29.8	4.2	4.1	2.6	5.1	2.9	2.1
China	10.3	7.4	6.5	-0.1	0.0	2.0	1.3
Japan	8.2	0.7	0.9	7.2	14.5	2.8	1.5
South Korea	1.7	3.4	3.5	-3.4	2.2	1.4	1.9
Taiwan	0.7	3.5	3.7	2.5	4.3	1.2	0.3
Indonesia	1.2	5.0	5.4	8.3	-3.5	6.4	6.9
Malaysia	0.4	5.2	4.1	2.2	1.1	3.3	4.0
Philippines	0.3	5.9	6.4	2.0	-1.4	4.2	3.1
Thailand	0.5	0.4	3.9	5.5	2.9	1.9	0.5
Vietnam	0.2	5.9	6.2	-1.4	-1.8	4.2	4.0
India	2.8	5.3	6.3	-1.4	-2.6	7.2	5.7
Australia	1.8	2.8	2.8	6.2	16.3	2.5	2.0
New Zealand	0.2	3.5	3.1	-1.1	7.0	1.6	2.0
Middle East	4.4	3.1	3.2	1.5	7.2	4.8	3.9
Turkey	1.4	2.6	3.1	7.2	6.9	8.9	8.0
Africa	3.0	3.5	4.6	3.6	2.7	6.8	6.4
South Africa	0.6	1.5	2.4	7.6	-0.5	6.2	6.1

1/ Real values have a 2005 base year.

2/ Local currency per U.S. dollar. A negative growth rate indicates a depreciation of the U.S. dollar. World is U.S. trade-weighted average.

Source: Calculations and compilation by USDA, Economic Research Service using data and forecasts from IHS Global Insight, the International Monetary Fund (IMF), and Oxford Economics.

## Export Products

Fiscal year 2015 grain and feed exports are forecast at \$29.9 billion. This is unchanged from the November estimate and occurs despite changes in most categories. Coarse grain exports are forecast at \$10.3 billion, up \$800 million, led mostly by higher sorghum volumes and values. Sorghum shipments are forecast at 7.5 million tons, the highest in nearly 25 years, resulting from continued strong purchases by China. Corn volume is unchanged at 44.5 million tons, but the unit value is raised slightly reflecting firmer prices with tighter supplies. Feeds and fodders are down \$200 million as higher unit values for distiller's dried grains with solubles (DDGS) and other products are more than offset by slightly lower volumes.

Wheat is forecast at \$6.4 billion, down \$200 million on lower volume, which more than offsets slightly higher unit values. Abundant competitor supplies continue to constrain export opportunities. Expectations for large global production in 2015/16 limit prospects for early season exports. Rice exports are forecast at \$1.9 billion, down \$200 million from November. Large global supplies continue to weigh on prices lowering unit values, while volumes are reduced due to greater competition in Africa and the Middle East from Asian exporters.

Oilseed and product exports are forecast at \$30.9 billion, up \$1.2 billion from the November forecast. Soybeans and soybean meal continue to ship at a record pace, buoyed by strong demand and minimal competition from South America. This has kept unit values stronger than expected. Partially offsetting these gains are reductions in soybean oil and other oilseeds where reduced export volumes and weaker unit values prevail, in part due to falling petroleum prices.

Fiscal 2015 cotton exports are forecast at \$3.7 billion, unchanged from the November estimate. Export volume is forecast up 100,000 tons to 2.3 million, despite a smaller crop than previously expected as U.S. exports capture a rising share of world trade. Unit values are reduced due to expected lower world consumption pushing world prices down.

Fiscal 2015 livestock, poultry, and dairy exports are reduced \$1.9 billion to \$31.8 billion as fewer shipments are expected for beef, pork, poultry, and dairy. Beef is lowered \$100 million to \$6.5 billion on weaker demand due to higher U.S. prices and a stronger dollar. Pork is forecast down \$700 million to \$4.8 billion as a strong dollar reduces competitiveness, more than offsetting the impact of a moderation in prices. Poultry and products are cut \$300 million to \$6.1 billion due to weaker prices and demand. Dairy is reduced \$200 million to \$6.5 billion as global prices remain weak and the strong U.S. dollar makes exports less competitive.

Fiscal 2015 horticultural product exports are forecast at \$36.0 billion, down \$1.0 billion from the November forecast. Fresh fruit and vegetable exports are forecast at \$7.7 billion, down \$200 million from November on lower fruit shipments to Canada, Japan and Hong Kong as well as reduced vegetable exports to Mexico. Processed fruit and vegetable exports are forecast at \$8.0 billion, down \$100 million from November due to reduced dried fruit exports to Europe. Whole and processed tree nuts are forecast at \$9.0 billion, down \$500 million from November as demand in Europe and China slows.

Table 3--U.S. agricultural exports: Value and volume, by commodity, 2014-15

Commodity	October-December		Fiscal 2014	Forecast fiscal year 2015	
	2013	2014		Nov.	Feb.
<b>VALUE</b>					
<i>-- Billion dollars --</i>					
Grains and feeds 1/	8.382	7.127	36.491	29.9	29.9
Wheat 2/	1.903	1.351	8.240	6.6	6.4
Rice	0.563	0.562	2.050	2.1	1.9
Coarse grains 3/	2.471	2.322	12.527	9.5	10.3
Corn	2.325	1.837	11.110	8.3	8.5
Feeds and fodders	2.269	1.724	9.050	7.1	6.9
Oilseeds and products	15.574	15.289	35.051	29.7	30.9
Soybeans	12.534	12.492	24.243	19.8	21.3
Soybean meal 4/	1.747	1.535	5.706	4.7	4.9
Soybean oil	0.237	0.239	0.810	0.8	0.8
Livestock, poultry, and dairy	8.366	8.284	33.815	33.7	31.8
Livestock products	4.963	5.123	19.995	20.6	19.2
Beef and veal 5/	1.452	1.712	6.038	6.6	6.5
Pork 5/	1.386	1.345	5.678	5.5	4.8
Beef and pork variety meats 5/	0.390	0.485	1.610	1.7	1.7
Hides, skins, and furs	0.679	0.616	2.988	3.2	2.8
Poultry and products	1.608	1.666	6.408	6.4	6.1
Broiler meat 5/ 6/	1.042	1.007	4.098	4.1	3.9
Dairy products	1.795	1.495	7.412	6.7	6.5
Tobacco, unmanufactured	0.357	0.329	1.113	1.1	1.1
Cotton	0.948	0.748	4.595	3.7	3.7
Seeds	0.502	0.448	1.723	1.7	1.7
Horticultural products 7/	9.536	9.430	33.433	37.0	36.0
Fruits and vegetables, fresh	1.989	1.929	7.420	7.9	7.7
Fruits and vegetables, processed	1.895	1.845	7.610	8.1	8.0
Tree nuts, whole and processed	3.083	3.046	8.133	9.5	9.0
Sugar and tropical products 8/	1.645	1.607	6.277	6.7	6.5
Major bulk products 9/	18.776	17.804	52.768	42.8	44.7
Total	45.314	43.267	152.513	143.5	141.5
<b>VOLUME</b>					
<i>--- Million metric tons ---</i>					
Wheat 2/	6.169	4.517	27.057	25.7	24.2
Rice	0.978	1.111	3.360	3.8	3.7
Coarse grains 3/	10.962	11.347	56.718	50.4	52.3
Corn	10.317	9.258	50.565	44.5	44.5
Feeds and fodders	5.729	4.434	27.860	20.0	18.2
Soybeans	23.845	28.533	45.420	46.8	48.7
Soybean meal 4/	3.366	3.235	10.478	11.6	11.6
Soybean oil	0.239	0.283	0.851	1.0	0.9
Beef and veal 5/	0.227	0.216	0.869	0.9	0.8
Pork 5/	0.450	0.392	1.711	1.8	1.6
Beef and pork variety meats 5/	0.197	0.220	0.796	0.8	0.9
Broiler meat 5/ 6/	0.850	0.809	3.354	3.3	3.2
Tobacco, unmanufactured	0.050	0.048	0.152	0.2	0.2
Cotton	0.435	0.425	2.176	2.2	2.3
Major bulk products 9/	42.438	45.980	134.882	129.1	131.4

Totals 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/ Includes soy flours made from protein meals. 5/ Includes chilled, frozen, and processed meats.

6/ Includes only federally inspected product. 7/ Includes food preparations, essential oils, and wine. 8/ Includes coffee and cocoa products, tea, and spices. 9/ Includes wheat, rice, coarse grains, soybeans, cotton, and unmanufactured tobacco.

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

## Regional Exports

Agricultural exports in fiscal 2015 are forecast at \$141.5 billion, which is \$2.0 billion below the November forecast and \$11 billion below the record fiscal 2014 exports. The forecast is down primarily due to **Japan, China** and the **European Union**, and is also impacted by the stronger dollar.

### *Asia*

Exports to **China** are forecast down \$400 million to \$23.6 billion. This decline is primarily a result of weaker U.S. exports of hides and skins (of which China accounts for half of all U.S. shipments), as well as softening Chinese demand for U.S. pork, poultry and dairy products. U.S. exports of most horticultural products (especially tree nuts) to China have also slowed. However, exports and sales of soybeans to China have continued to be very strong, as well as a very large increase in sales of sorghum. U.S. agricultural exports to China in the first quarter of fiscal year 2015 (October-December) were down \$1.3 billion compared to the same period last year. China is still forecast to remain the largest global export market for U.S. agricultural products.

**Japan** is down \$400 million to \$12.3 billion as a result of expected lower U.S. shipments of pork and beef (Japan is the largest U.S. market for both of these products). Exports to **South Korea** are down \$100 million to \$6.0 billion on weaker demand for U.S. pork and poultry. **Malaysia** is also down \$100 million to \$900 million.

### *Western Hemisphere*

**Canada** is unchanged as stronger sales of soybeans and corn are expected to offset expected weaker export values of livestock products.

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

Exports to **the European Union** are down \$400 million to \$12.1 billion as demand, especially for U.S. horticultural products, is expected to weaken due to the stronger dollar.

Exports to **North Africa** are down \$200 million to \$2.3 billion (including **Egypt**, which is down \$100 million to \$1.4 billion) because of a sluggish early-season pace of U.S. exports, especially of dairy in light of increased competition from the European Union. Exports to **Sub-Saharan Africa** are also down \$200 million to \$2.2 billion and exports to the **Middle East** are down \$100 million to \$5.9 billion.

Table 4--U.S. agricultural exports: Value by region, 2014-15

Country and region 1/	October-December		Fiscal 2014	Share of 2014 total	Forecast fiscal year 2015	
	2013	2014			Nov.	Feb.
	-- Billion dollars --			Percent	-- Billion dollars --	
Asia	22.803	21.437	66.856	43.8	63.1	62.1
East Asia	19.400	17.958	53.706	35.2	50.2	49.3
Japan	3.038	2.840	13.382	8.8	12.7	12.3
China	12.383	11.058	25.884	17.0	24.0	23.6
Hong Kong	1.465	1.503	4.058	2.7	4.2	4.2
Taiwan	0.956	0.969	3.498	2.3	3.2	3.2
South Korea	1.555	1.583	6.867	4.5	6.1	6.0
Southeast Asia	3.068	3.043	11.468	7.5	11.1	11.0
Indonesia	0.742	0.676	2.986	2.0	2.8	2.8
Philippines	0.709	0.664	2.784	1.8	2.7	2.7
Malaysia	0.276	0.233	0.998	0.7	1.0	0.9
Thailand	0.450	0.496	1.610	1.1	1.5	1.5
Vietnam	0.668	0.759	2.236	1.5	2.0	2.0
South Asia	0.335	0.436	1.682	1.1	1.8	1.8
India	0.197	0.230	0.996	0.7	0.9	0.9
Western Hemisphere	14.102	14.342	56.629	37.1	53.8	53.7
North America	10.244	10.258	41.242	27.0	40.5	40.5
Canada	5.309	5.457	21.744	14.3	21.8	21.8
Mexico	4.934	4.800	19.497	12.8	18.7	18.7
Caribbean	0.888	0.905	3.648	2.4	3.6	3.6
Dominican Republic	0.324	0.332	1.282	0.8	1.1	1.1
Central America	0.989	1.075	3.766	2.5	3.3	3.3
South America	1.981	2.104	7.973	5.2	6.4	6.3
Brazil	0.492	0.262	1.660	1.1	0.9	0.9
Colombia	0.527	0.676	2.271	1.5	2.0	2.0
Peru	0.167	0.413	0.939	0.6	0.8	0.8
Venezuela	0.369	0.331	1.322	0.9	1.3	1.2
Europe/Eurasia	4.632	4.187	14.842	9.7	13.8	13.4
European Union-28	3.895	3.788	12.707	8.3	12.5	12.1
Other Europe 2/	0.177	0.175	0.569	0.4	0.6	0.6
FSU-12 3/	0.561	0.224	1.565	1.0	0.7	0.7
Russia	0.413	0.147	1.174	0.8	0.4	0.4
Middle East	1.869	1.774	6.660	4.4	6.0	5.9
Turkey	0.597	0.656	2.071	1.4	1.9	1.9
Saudi Arabia	0.359	0.314	1.401	0.9	1.2	1.2
Africa	1.207	0.962	5.236	3.4	4.9	4.5
North Africa	0.614	0.438	2.851	1.9	2.5	2.3
Egypt	0.337	0.203	1.878	1.2	1.5	1.4
Sub-Saharan Africa	0.592	0.524	2.385	1.6	2.4	2.2
Nigeria	0.194	0.141	0.893	0.6	0.9	0.8
Oceania	0.529	0.564	2.119	1.4	2.1	2.1
Trans-shipments via Canada 4/	0.172	0.000	0.172	0.1	0.0	0.0
<b>Total</b>	<b>45.314</b>	<b>43.267</b>	<b>152.513</b>	<b>100.0</b>	<b>143.5</b>	<b>141.5</b>

Totals may not add due to rounding.

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

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

3/ The former 15 Republics of the Soviet Union, not including the 3 Baltic Republics.

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

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

## Import Products

Import unit values in the first quarter of fiscal year 2015 were up 10 percent on average, boosting U.S. agricultural import value by 10 percent with volume growth of only 0.3 percent from 2014. The stronger domestic economy, which is reflected in the average 2.9-percent growth in real disposable personal income during the last half of 2014 and 3.1 percent for the whole of 2014, is expected to boost import demand for food and other farm products. The last U.S. agricultural import projection of \$116 billion for 2015 is raised \$3 billion to \$119 billion, representing 9 percent more imports than in 2014. Prices for imported commodities are expected to stabilize based partly on the dollar's strength, lower fuel prices, and because of relatively slower economic growth in the rest of the world.

The volatility of tropical commodity prices from 2012 to 2014, including vegetable oil prices, makes it difficult to estimate the value of U.S. tropical imports (except horticulture crops), which comprise about a quarter of total U.S. import value. Higher prices for coffee beans, cocoa beans, and coconut oil in 2014 contrast with lower prices for sugar (compared to 2012), palm oil, and rubber. Since most of these traded commodities are priced in dollars, the dollar's appreciation reduces their prices in terms of foreign currencies and limits their price volatility. While these commodities' source supply conditions influence their export price fluctuations, generally weaker import demand in major global markets dampens any sharp price swings.

Imports of sugar and tropical products are projected to climb to \$26.6 billion in 2015 from \$23.2 billion in 2014, a 15-percent expansion. Led by coffee beans, cocoa beans, and sugar products, these tropical imports' growth accounts for 34 percent of the projected \$9.8 billion additional total U.S. agricultural import value from 2014. More stable prices for tropical oils, which account for 35 percent of U.S. vegetable oil imports, will keep total vegetable oil import value at around \$5.4 billion, the same level as in 2014 despite higher prices for imported olive oil. However, imported oilseeds and other oilseed products, estimated at \$4.3 billion in 2015, will be lower than in 2014 because of their lower average prices.

Prices for horticultural crops and products are not as volatile as tropical commodity prices and their annual import growth rates have been more consistent. Part of the reason for this contrast is the dominant role of NAFTA partners Mexico and Canada as well as the European Union as principal sources of U.S. horticulture imports, together accounting for 61 percent of total import value. More advanced agricultural infrastructure and less weather-related disruptions in these countries contribute to highly reliable supply conditions. For tropical imports such as coffee beans, cocoa beans, sugar, rubber, and spices, supply from Mexico, Canada, and the EU account for only a third of total value, and the rest of suppliers are distributed widely around the world. These tropical crops are more vulnerable to changes in weather and yield which lead to sharp price swings. The combined \$7.8 billion import increase of these two groups in 2015 account for 80 percent of the total \$9.8 billion projected increase in U.S. agricultural imports.

US imports of fresh fruits are projected to exceed \$10 billion for the first time. This amount exceeds imports of oilseeds and products, and is just under the import value for grains and feeds. Led by bananas, avocados, and grapes, demand for these fresh fruits is driven by higher consumer incomes and healthier diets. The value of

imported fresh vegetables is also expected to reach a record high of \$7.5 billion in 2015. Led by tomatoes and bell peppers, a good portion of these vegetables are grown in greenhouses, enhancing their quality and reducing price volatility. In contrast, imported coffee beans, which are projected to also exceed \$7 billion in 2015, are grown in open fields in various countries where yields can vary widely between years and between suppliers, making prices less predictable.

Cattle and calve imports in 2015 are projected to increase by \$440 million from \$2.2 billion in 2014 to \$2.6 billion in 2015. Demand for cattle is expected to remain strong as domestic herd recovery continues. However, smaller inventories in Canada and Mexico will limit import growth. Beef imports are raised on strong demand for processing-type beef. Greater pork production and lower domestic prices will also limit pork imports in 2015 as well as swine imports. Despite lower expected dairy product prices, a strong dollar will support demand for dairy products.

Although bulk grain imports are projected to be lower in 2015 because of ample domestic supply, imported grain products and feeds have higher initial-year volumes than in 2014 since import unit values are lower. The import estimate for processed grain products in 2015 is \$6.9 billion, up \$400 million from 2014. For feeds and fodder, imports are anticipated to climb \$200 million to \$1.8 billion in 2015. The situation for oilseeds and products is not unlike that of grains and feeds where large domestic supplies will reduce import volumes for oilseeds and oilmeal. For vegetable oils, however, diminished beginning stocks in 2015, larger export shipments, and lower import unit values for rapeseed, palm, and olive oils together encourage a bigger import quantity in 2015.

Table 5--U.S. agricultural imports: Value and volume, by commodity, 2014-15

Commodity	October-December		Fiscal 2014	Forecast fiscal year 2015	
	2013	2014		Nov.	Feb.
	<b>VALUE</b> <span style="float:right">--- Billion dollars ---</span>				
Livestock and dairy products	3.589	5.218	16.029	16.8	17.8
Livestock and meats	2.558	4.075	12.053	12.9	13.7
Cattle and calves	0.528	0.896	2.124	2.6	2.6
Swine	0.078	0.107	0.408	0.4	0.4
Beef and veal	0.860	1.752	4.729	5.3	6.1
Pork	0.389	0.489	1.686	1.7	1.5
Dairy products	0.858	0.967	3.276	3.2	3.4
Cheese	0.354	0.398	1.229	1.3	1.4
Grains and feed	2.813	2.840	10.850	11.0	11.0
Grain products	1.683	1.786	6.507	6.8	6.9
Oilseeds and products	2.172	2.142	9.880	9.3	9.7
Vegetable oils	1.298	1.306	5.376	5.6	5.4
Horticulture products	11.068	11.732	46.975	50.9	51.4
Fruits, fresh	2.016	2.170	9.457	10.3	10.0
Fruits, processed	1.095	1.182	4.731	5.0	5.2
Fruit juices	0.443	0.469	1.839	2.0	2.0
Nuts, whole and processed	0.534	0.714	2.073	2.4	2.7
Vegetables, fresh	1.631	1.742	6.651	7.1	7.5
Vegetables, processed	1.085	1.111	4.341	4.6	4.7
Wine	1.440	1.403	5.488	5.8	5.9
Malt beer	0.870	0.904	4.084	4.5	4.4
Essential oils	0.692	0.772	2.989	3.3	3.4
Cut flowers and nursery stock	0.391	0.401	1.711	1.8	1.8
Sugar and tropical products	5.242	5.575	23.218	25.3	26.6
Sweeteners & products	1.092	1.095	4.727	4.5	4.4
Confections	0.406	0.418	1.664	1.8	1.8
Cocoa and chocolate	1.067	1.046	4.698	5.1	5.2
Coffee beans and products	1.214	1.528	6.009	6.5	7.2
Rubber, natural	0.587	0.400	2.141	2.5	2.2
Other imports 1/	0.517	0.442	2.231	2.5	2.4
Total agricultural imports	25.401	27.950	109.184	116.0	119.0
<b>VOLUME</b> <span style="float:right">--- Million metric tons 2/---</span>					
Wine 3/	0.299	0.285	1.144	1.2	1.2
Malt beer 3/	0.737	0.747	3.424	3.7	3.6
Fruit juices 3/	1.070	1.121	4.325	4.4	4.5
Cattle and calves 4/	0.654	0.781	2.233	2.3	2.3
Swine 4/	1.075	1.272	4.752	4.8	4.9
Beef and veal	0.172	0.275	0.887	0.9	1.0
Pork	0.102	0.133	0.413	0.4	0.4
Fruits, fresh	2.422	2.389	10.852	11.4	11.0
Fruits, processed	0.387	0.411	1.673	1.8	1.8
Vegetables, fresh	1.549	1.626	6.404	6.8	6.8
Vegetables, processed	0.813	0.824	3.325	3.5	3.5
Vegetable oils	1.038	1.071	4.178	4.3	4.4
Cocoa and chocolate	0.307	0.262	1.332	1.4	1.3
Coffee beans	0.353	0.336	1.589	1.7	1.6

Totals may not add due to rounding.

1/ Largely tobacco and planting seeds. 2/ With exceptions footnoted. 3/ Liquid volume is in billion liters.

4/ Million head.

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

## Regional Imports

During the first quarter of fiscal 2015, the imports that registered the largest gains include livestock and meat products led by beef, pork, and cattle. Beef and veal are mostly shipped from Australia, Canada, New Zealand, and Mexico. Top pork sources include Canada, Denmark, Italy, and Poland. Cattle are shipped mainly from Canada and Mexico, attributed to lower transport costs. Horticulture products also posted large import gains—led by Mexico, the European Union, Canada, China, and Chile. Vegetables and fruits are shipped from Mexico; wine, beer, and essential oils come from Europe; vegetables from Canada and China; and fruits from Chile, China, and Canada. The dollar's higher exchange rate will foster competition among these suppliers based more on prices.

Among the top 20 sources of U.S. agricultural imports that have rising market shares are Vietnam, Peru, and the Philippines with \$1.8, \$1.6, and \$1.1 billion in import values, respectively in 2014. Vietnam's top shipments include tree nuts, largely cashews, coffee beans, and spices. From Peru are vegetables, fruits, and coffee. The Philippines shipped coconut oil, fruits, and other coconut products. In recent years, these countries have grabbed US market share from Malaysia, Costa Rica, and Colombia. While commodity price fluctuations influence these relative market shares, the long-term trend in capturing a larger share of the US market favors developing countries at the expense of developed countries over the past decade.

Table 6--U.S. agricultural imports: Value by region, 2014-15

Region and country	Forecast fiscal year				
	October-December		Fiscal 2014	2015	
	2013	2014		Nov.	Feb.
	<b>VALUE</b>				
	<i>-- Billion dollars--</i>				
Western Hemisphere	13.868	15.146	60.568	63.3	66.1
Canada	5.569	5.872	22.816	23.7	24.1
Mexico	4.289	4.698	18.862	19.6	20.7
Central America	0.898	1.105	4.770	5.2	5.7
Costa Rica	0.318	0.351	1.559	1.7	1.7
Guatemala	0.379	0.445	1.827	2.0	2.1
Other Central America	0.201	0.308	1.384	1.5	1.8
Caribbean	0.098	0.105	0.504	0.5	0.6
South America	3.014	3.365	13.615	14.3	15.2
Argentina	0.409	0.379	1.542	1.7	1.5
Brazil	0.747	0.956	3.674	3.8	4.3
Chile	0.408	0.421	2.745	2.9	3.0
Colombia	0.563	0.636	2.358	2.5	2.7
Other South America	0.434	0.500	1.559	---	1.8
Europe and Eurasia	0.454	0.473	1.738	3.4	1.9
European Union-28	5.059	5.367	20.122	21.7	21.4
Other Europe	4.737	4.961	18.735	20.3	19.6
Asia	0.299	0.339	1.273	1.3	1.4
East Asia	4.448	4.692	18.700	20.3	20.1
China	1.483	1.431	5.754	6.3	5.9
Other East Asia	1.120	1.060	4.338	4.8	4.4
Southeast Asia	0.363	0.370	1.417	1.5	1.5
Indonesia	2.294	2.361	9.722	10.6	10.0
Malaysia	0.781	0.704	3.094	3.4	2.9
Thailand	0.349	0.341	1.500	1.7	1.5
Other Southeast Asia	0.553	0.539	2.242	2.5	2.3
South Asia	0.329	0.446	1.658	---	2.0
India	0.281	0.330	1.228	3.0	1.3
Oceania	0.672	0.900	3.223	3.4	4.2
Australia	0.617	0.828	2.968	3.2	3.9
New Zealand	1.230	1.946	5.902	6.4	7.6
Africa	0.740	1.296	3.341	3.6	4.4
Sub-Saharan Africa	0.462	0.612	2.460	2.7	3.1
Ivory Coast	0.530	0.509	2.677	2.9	2.6
Middle East	0.446	0.423	2.337	2.5	2.2
Turkey	0.204	0.111	1.146	1.4	0.6
World total	0.166	0.188	0.786	0.9	0.9

Totals may not add due to rounding.

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

# Reliability Tables

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

Commodity	Average absolute forecast errors Fiscal 2012-14					Forecast accuracy Fiscal 2012-14					Forecast accuracy
	Aug	Nov	Feb	May	Aug	Aug	Nov	Feb	May	Aug	
<b>Export value</b>	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Grains and feeds	21	16	7	3	3	-	-	-	X	X	40
Wheat	17	10	4	5	5	-	-	X	X	X	60
Rice	6	2	6	2	3	-	X	-	X	X	60
Coarse grains	59	47	25	8	2	-	-	-	-	X	20
Corn	60	48	26	7	2	-	-	-	-	X	20
Feeds and fodders	12	15	12	5	2	-	-	-	X	X	40
Oilseeds and products	13	10	8	4	2	-	-	-	X	X	40
Soybeans	10	10	10	6	2	-	-	-	-	X	20
Soybean meal	32	26	18	11	3	-	-	-	-	X	20
Soybean oil	20	25	19	11	0	-	-	-	-	X	20
Livestock, poultry, and dairy	7	6	4	3	1	-	-	X	X	X	60
Livestock products	3	2	3	3	1	X	X	X	X	X	100
Beef and veal	11	9	6	4	1	-	-	-	X	X	40
Pork	8	5	4	3	2	-	X	X	X	X	80
Beef and pork variety meats	7	7	9	4	2	-	-	-	X	X	40
Hides, skins, and furs	3	8	4	2	1	X	-	X	X	X	80
Poultry and products	7	6	4	3	2	-	-	X	X	X	60
Broiler meat	10	6	3	3	2	-	-	X	X	X	60
Dairy products	23	20	16	10	3	-	-	-	-	X	20
Tobacco, unmanufactured	6	3	3	9	0	-	X	X	-	X	60
Cotton	8	11	7	3	2	-	-	-	X	X	40
Planting seeds	12	10	10	10	2	-	-	-	-	X	20
Horticultural products	2	2	2	1	1	X	X	X	X	X	100
Fruits and vegetables, fresh	5	5	4	3	3	X	X	X	X	X	100
Fruits and veget., processed	4	4	2	2	2	X	X	X	X	X	100
Tree nuts	4	4	4	2	2	X	X	X	X	X	100
Sugar and tropical products	11	8	7	3	2	-	-	-	X	X	40
Major bulk products	16	12	7	2	1	-	-	-	X	X	40
Total agricultural exports	5	5	4	1	0	X	X	X	X	X	100
Average error & accuracy	14	12	8	5	2	24%	31%	45%	72%	100%	54
<b>Export volume</b>											
Wheat	5	3	6	7	4	X	X	-	-	X	60
Rice	7	6	7	3	1	-	-	-	X	X	40
Coarse grains	44	34	20	9	3	-	-	-	-	X	20
Corn	46	35	21	9	3	-	-	-	-	X	20
Feeds and fodders	16	19	13	8	9	-	-	-	-	-	0
Soybeans	10	8	7	5	2	-	-	-	X	X	40
Soybean meal	21	16	12	7	2	-	-	-	-	X	20
Soybean oil	28	31	17	17	8	-	-	-	-	-	0
Beef and veal	12	8	8	8	0	-	-	-	-	X	20
Pork	4	6	2	0	2	X	-	X	X	X	80
Beef and pork variety meats	8	13	13	8	4	-	-	-	-	X	20
Broiler meat	5	3	0	1	2	X	X	X	X	X	100
Tobacco, unmanufactured	0	0	17	17	0	X	X	-	-	X	60
Cotton	5	9	8	4	3	X	-	-	X	X	60
Major bulk products	14	11	5	3	2	-	-	X	X	X	60
Average error & accuracy	15	13	10	7	3	33%	20%	20%	40%	87%	40

- = Error exceeds 5 percent.

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

Country/region	Average absolute forecast errors Fiscal 2012-14					Forecast accuracy Fiscal 2012-14					Forecast accuracy Percent
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
<b>Export value</b>	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					
Asia	17	7	5	2	1	-	-	X	X	X	60
East Asia	8	10	7	2	2	-	-	-	X	X	40
Japan	8	8	6	3	3	-	-	-	X	X	40
China	15	15	13	15	11	-	-	-	-	-	0
Hong Kong	11	11	6	4	7	-	-	-	X	-	20
Taiwan	10	10	10	7	8	-	-	-	-	-	0
South Korea	19	20	19	14	5	-	-	-	-	X	20
Southeast Asia	10	8	5	2	3	-	-	X	X	X	60
Indonesia	21	15	9	3	3	-	-	-	X	X	40
Philippines	11	9	7	4	1	-	-	-	X	X	40
Malaysia	14	14	7	7	7	-	-	-	-	-	0
Thailand	21	21	16	2	8	-	-	-	X	-	20
Vietnam	12	12	9	2	0	-	-	-	X	X	40
South Asia	27	27	27	21	17	-	-	-	-	-	0
India	7	7	7	0	3	-	-	-	X	X	40
Western Hemisphere	4	4	3	3	1	X	X	X	X	X	80
North America	4	4	3	1	1	X	X	X	X	X	80
Canada	3	2	2	1	0	X	X	X	X	X	80
Mexico	8	7	5	2	1	-	-	X	X	X	60
Caribbean	4	4	4	7	5	X	X	X	-	X	60
Dominican Republic	18	18	12	9	9	-	-	-	-	-	0
Central America	16	16	16	5	5	-	-	-	X	X	40
South America	21	21	16	9	3	-	-	-	-	X	20
Brazil	50	52	44	34	6	-	-	-	-	-	0
Colombia	44	44	26	16	1	-	-	-	-	X	20
Peru	31	31	34	10	10	-	-	-	-	-	0
Venezuela	14	14	14	14	5	-	-	-	-	X	20
Europe and Eurasia	15	14	10	6	4	-	-	-	-	X	20
European Union-27	19	18	14	7	3	-	-	-	-	X	20
Other Europe	27	27	27	27	7	-	-	-	-	-	0
FSU-12	11	11	11	11	7	-	-	-	-	-	0
Russia	18	18	18	18	2	-	-	-	-	X	20
Middle East	19	14	13	9	6	-	-	-	-	-	0
Turkey	20	11	8	5	3	-	-	-	X	X	40
Saudi Arabia	10	16	16	5	5	-	-	-	X	X	40
Africa	29	23	14	13	7	-	-	-	-	-	0
North Africa	43	32	18	21	12	-	-	-	-	-	0
Egypt	36	23	8	11	11	-	-	-	-	-	0
Sub-Saharan Africa	12	14	12	8	5	-	-	-	-	X	20
Nigeria	20	13	7	7	4	-	-	-	-	X	20
Oceania	37	16	16	16	7	-	-	-	-	-	0
<b>Average error and accuracy</b>	18	16	13	9	5	10%	10%	17%	41%	61%	26

- = Error exceeds 5 percent.

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

Commodity	Average absolute forecast errors Fiscal 2012-14					Forecast accuracy Fiscal 2012-14					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
<b>Import value</b>	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Livestock, poultry, and dairy	4	6	4	5	2	X	-	X	X	X	80
Livestock and meats	5	7	5	5	2	X	-	X	X	X	80
Cattle and calves	21	18	11	10	5	-	-	-	-	X	20
Swine	31	31	31	11	11	-	-	-	-	-	0
Beef and veal	6	14	11	10	5	-	-	-	-	X	20
Pork	8	6	6	7	4	-	-	-	-	X	20
Dairy products	4	6	2	4	2	X	-	X	X	X	80
Cheese	6	3	3	6	6	-	X	X	-	-	40
Grains and feed	2	7	6	2	2	X	-	-	X	X	60
Grain products	3	2	3	2	1	X	X	X	X	X	100
Oilseeds and products	8	10	7	3	2	-	-	-	X	X	40
Vegetable oils	11	12	5	4	2	-	-	X	X	X	60
Horticulture products	3	2	4	4	1	X	X	X	X	X	100
Fruits, fresh	3	3	1	5	1	X	X	X	X	X	100
Fruits, processed	13	12	14	11	2	-	-	-	-	X	20
Fruit juices	24	19	9	9	4	-	-	-	-	X	20
Nuts and preparations	18	13	9	7	7	-	-	-	-	-	0
Vegetables, fresh	4	6	7	4	2	X	-	-	X	X	60
Vegetables, processed	7	5	4	4	2	-	X	X	X	X	80
Wine	3	3	5	3	0	X	X	X	X	X	100
Malt beer	8	8	3	3	1	-	-	X	X	X	60
Essential oils	6	3	3	2	4	-	X	X	X	X	80
Cut flowers and nursery stock	2	2	2	0	0	X	X	X	X	X	100
Sugar and tropical products	20	17	12	7	3	-	-	-	-	X	20
Sweeteners and products	20	13	8	8	3	-	-	-	-	X	20
Confections	6	6	2	2	2	-	-	X	X	X	60
Cocoa and products	12	13	11	7	6	-	-	-	-	-	0
Coffee beans and products	24	17	12	10	4	-	-	-	-	X	20
Natural rubber	55	49	45	22	11	-	-	-	-	-	0
Other imports	17	24	21	11	4	-	-	-	-	X	20
Total agricultural imports	6	4	4	4	1	-	X	X	X	X	80
Average error and accuracy	12	11	9	6	3	32%	29%	48%	55%	84%	50
<b>Import volume</b>											
Wine (HL)	14	14	9	6	3	-	-	-	-	X	20
Malt beer (HL)	5	4	3	2	2	X	X	X	X	X	100
Fruit juices (HL)	22	22	13	4	2	-	-	-	X	X	40
Cattle and calves	9	10	9	13	3	-	-	-	-	X	20
Swine	6	2	1	2	1	-	X	X	X	X	80
Beef and veal	14	12	8	13	13	-	-	-	-	-	0
Pork	0	0	17	17	8	X	X	-	-	-	40
Fruits--fresh	3	3	1	2	1	X	X	X	X	X	100
Fruits--processed	13	12	6	4	0	-	-	-	X	X	40
Vegetables--fresh	1	1	1	2	1	X	X	X	X	X	100
Vegetables--processed	4	3	3	1	1	X	X	X	X	X	100
Vegetable oils	6	3	4	6	2	-	X	X	-	X	60
Cocoa and products	8	6	8	11	8	-	-	-	-	-	0
Coffee beans and products	7	4	4	0	0	-	X	X	X	X	80
Average error and accuracy	8	7	6	6	3	36%	57%	50%	57%	79%	56

- = Error exceeds 5 percent. HL = hectoliters.

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

Country/region	Average absolute forecast errors Fiscal 2012-14					Forecast accuracy Fiscal 2012-14					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
<b>Import value</b>	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Western Hemisphere	5	4	4	4	2	X	X	X	X	X	80
Canada	3	3	2	3	2	X	X	X	X	X	80
Mexico	5	9	4	5	1	X	-	X	X	X	60
Central America	10	4	11	8	1	-	X	-	-	X	40
Costa Rica	7	4	2	4	0	-	X	X	X	X	80
Guatemala	9	5	10	7	5	-	X	-	-	X	40
Other Central America	14	11	16	10	2	-	-	-	-	X	20
Caribbean	19	12	19	13	0	-	-	-	-	X	20
South America	7	3	6	5	4	-	X	-	X	X	60
Argentina	17	13	15	12	6	-	-	-	-	-	0
Brazil	11	4	9	15	9	-	X	-	-	-	20
Chile	7	10	5	4	1	-	-	X	X	X	60
Colombia	15	10	12	3	1	-	-	-	X	X	40
Other South America	11	4	5	3	5	-	X	X	X	X	80
Europe and Eurasia	3	5	1	2	1	X	X	X	X	X	80
European Union-27	3	5	1	2	1	X	X	X	X	X	80
Other Europe	5	6	5	11	5	X	-	X	-	X	40
Asia	16	8	12	7	2	-	-	-	-	X	20
East Asia	7	6	6	6	1	-	-	-	-	X	20
China	8	7	8	6	2	-	-	-	-	X	20
Other East Asia	5	10	5	5	0	X	-	X	X	X	60
Southeast Asia	19	11	14	9	3	-	-	-	-	X	20
Indonesia	21	13	19	10	3	-	-	-	-	X	20
Malaysia	34	24	25	15	5	-	-	-	-	X	20
Thailand	19	11	14	9	3	-	-	-	-	X	20
Other Southeast Asia	10	6	6	5	2	-	-	-	X	X	40
South Asia	55	43	44	26	7	-	-	-	-	-	0
India	55	44	44	25	7	-	-	-	-	-	0
Oceania	7	4	11	10	6	-	X	-	-	-	20
Australia	8	5	12	10	7	-	X	-	-	-	20
New Zealand	5	1	9	10	4	X	X	-	-	X	40
Africa	15	11	11	8	6	-	-	-	-	-	0
Sub-Saharan Africa	16	11	11	6	5	-	-	-	-	X	20
Ivory Coast	19	20	8	19	11	-	-	-	-	-	0
Middle East	7	10	10	7	0	-	-	-	-	X	20
Turkey	10	10	14	10	6	-	-	-	-	-	0
Average error & accuracy	14	10	11	9	4	22%	36%	28%	33%	75%	34

- = Error exceeds 5 percent.

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### Related Websites

Outlook for U.S. Agricultural Trade

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

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

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

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

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

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