

# Agricultural Outlook Forum 2000



February 24-25, 2000  
Crystal Gateway Marriott Hotel  
Arlington, Virginia



CONFERENCE PROGRAM

## General Information

### WELCOME TO THE FORUM

The U.S. Department of Agriculture welcomes you to Agricultural Outlook Forum 2000. We hope you enjoy the Forum and your visit to the Nation's Capital. If you need assistance, ask a volunteer wearing a "staff" ribbon.

### FACILITIES



The Crystal Gateway Marriott Hotel is a Three Diamond Hotel, with several restaurants, an indoor pool, and a fitness facility.

The Hotel is located on the Blue and Yellow lines at the Crystal City Station of the Metro subway system. It is convenient to underground shops and to the Fashion Center Mall at Pentagon

City. Check your portfolio for guides to the Metro system and the Fashion Center.

### PARKING

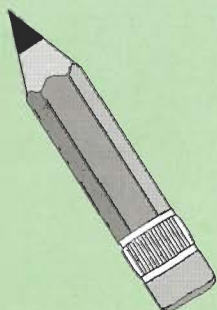
Parking will be discounted to \$7.00 per day for all Forum attendees and hotel guests. Inform the parking attendant that you are attending the Outlook Forum when you exit the garage.

### REGISTRATION

The Forum registration desk will be located in Salon II of the Arlington Ballroom on Thursday from 7:00 a.m. to 11:00 a.m. For the rest of Thursday and on Friday starting at 7:00 a.m., the registration desk will be located at the counter in the Arlington Foyer.

If you did not pay the advance registration fee, you will be asked to pay an on-site registration fee of \$230 for full registration, or \$155 for partial registration. The registration fee covers conference materials including speech texts, a portfolio, a copy of new long-term baseline projections, and refreshment breaks.

**W**e appreciate your candid assessment of the Outlook Forum. An evaluation form is in your portfolio. Please complete it and place in the bowls provided or return to any staff member. *Thank You!*



Telephone calls to the Forum should be directed to the Crystal Gateway Marriott Hotel at (703) 920-3230; ask the operator for the Outlook Forum registration desk.

### DINNERS AND LUNCHEONS

Prepaid tickets are necessary for the Thursday networking luncheon and dinner, and the luncheons on Friday. If you preregistered and ordered meals, you will receive tickets with your name badge. A limited number of unreserved tickets may be available for purchase on Thursday and Friday—check at the conference registration desk.

### SPEECH TEXTS

Copies of advance texts provided by speakers will be placed on the "speech" tables near Salons II and V of the Arlington Ballroom. Speeches will be available on the day they are given. Copies of any late speeches received will be placed on the tables as they become available. After the Forum, speeches will be posted on the Internet. See page 10 for instructions.

### PROCEEDINGS

All speeches submitted by speakers will be published after the Forum in an electronic Proceedings. See page 10 for more information.

### EXHIBITS

Exhibits in the Arlington Ballroom foyer will be open Thursday afternoon and all day Friday. Many USDA agencies are displaying information about their resources and programs; see page 10 for details.



### PRESS ROOM

An equipped and staffed press room for journalists covering the Forum is located in the McLean Room, one floor above the Ballroom.



# Program Preview

## THURSDAY, FEBRUARY 24

- 7:00 **Registration Opens** *Arlington Ballroom, Salon II*
- 8:30 - **PLENARY SESSIONS**  
12:30 *Arlington Ballroom*
- 8:30 **Opening Plenary**  
*Secretary of Agriculture Dan Glickman*  
*Keynote Speaker*
- 9:30 **Farm and Trade Prospects for 2000**  
**U.S. and World Agricultural Prospects**  
*USDA Chief Economist Keith Collins*  
**Agricultural Trade Prospects**  
*USDA Under Secretary August Schumacher, Jr.*
- 10:15 **Coffee Break**  
*Arlington Ballroom Foyer*
- 10:30 **The Future of Bio-Engineered Farm Products**
- 12:00 **Farming In the New Millennium**
- 1:00 **Networking Luncheon**  
*Salons I and II and Salon K, Grand Ballroom*
- 1:00 **Food Price Briefing**  
*Salon V*
- 2:15 **EXHIBITS OPEN**
- 2:15 **CONCURRENT SESSIONS**  
**Long-Term Commodity Prospects**  
*Salon III*  
**The Pros and Cons of Production and Marketing Contracts**  
*Salon IV*  
**Farm Income and Finance Outlook**  
*Salon V*  
**Rural America in the New Millennium**  
*Salon VI*
- 3:45 **Refreshment Break** *Arlington Ballroom Foyer*
- 4:00 **CONCURRENT SESSIONS**  
**Biotechnology Issues for U.S. Agriculture**  
*Salon III*  
**Concentration and Structural Change in Agriculture**  
*Salon IV*  
**World Trade Organization Outlook: New Negotiations and New Member Nations**  
*Salon V*  
**Farming Strategies for Weathering Tough Times**  
*Salon VI*
- 5:30 **Cash Bar**  
*Arlington Ballroom Foyer*
- 6:30 **FORUM DINNER**  
*Salons I, II, and III*  
**The Outlook for Farm and Trade Policy**  
*William G. Leshner*

## FRIDAY, FEBRUARY 25

- 7:00 **Registration Opens** *Arlington Ballroom Foyer*
- 7:15 **Continental Breakfast** *Arlington Ballroom Foyer*
- 8:00 **CONCURRENT SESSIONS**  
**The Outlook for Cotton and Fibers, Part 1: Domestic and Foreign Prospects**  
*Salon I*  
**The Outlook for Grains and Oilseeds**  
*Salon III*  
**The Outlook for Labor-Intensive Agriculture**  
*Salon IV*  
**The Trade Potential of Sub-Saharan Africa**  
*Salon V*  
**The Dairy Outlook**  
*Alexandria Room, Second Floor*
- 9:30 **Coffee Break** *Arlington Ballroom Foyer*
- 10:00 **CONCURRENT SESSIONS**  
**The Outlook for Cotton and Fibers, Part 2: Focus on Stocks**  
*Salon I*  
**New Markets for Bio-Based Energy and Industrial Products**  
*Salon III*  
**Mandatory Livestock Price Reporting: Implementation and Impact**  
*Salon IV*  
**Produce Marketing Information in the Internet Age**  
*Salon V*  
**The Global Food Market in the 21st Century**  
*Salons H and J, Grand Ballroom*  
**The Outlook for Sugar and Sweeteners**  
*Alexandria Room, Second Floor*
- 11:30 **Cash Bar** *Arlington Ballroom Foyer*
- 12:10 **LUNCHEONS**  
**Grains and Oilseeds Luncheon**  
*Salons I and II*  
**Livestock and Poultry Luncheon**  
*Salon IV*  
**Sugar and Sweeteners Luncheon**  
*Salon V*  
**Cotton Luncheon**  
*Salon VI*  
**Fruit and Vegetables Luncheon**  
*Salons H and J, Grand Ballroom*
- 2:00 **CONCURRENT SESSIONS**  
**The Potential Impact of Electronic Commerce on Agriculture and Rural America**  
*Salon III*  
**Nutrient Management Policies: Balancing Livestock Production with Environmental Quality**  
*Salon IV*  
**The Changing Market for Organic Foods**  
*Salon V*  
**U.S. and International Tobacco Outlook**  
*Alexandria Room, Second Floor*
- 3:30 **Adjourn**

Check the insert for any late changes in speakers or meeting locations. A hotel diagram is on the back cover of this program.

- 7:00 **REGISTRATION OPENS**  
*Arlington Ballroom, Salon II*
- 8:30- **OPENING PLENARY**  
9:30 *Arlington Ballroom*  
**Moderator: Deputy Secretary of Agriculture**  
**Richard Rominger**
- Keynote Address**  
*Secretary of Agriculture Dan Glickman*
- Featured Speaker, to be announced**
- 9:30- **FARM AND TRADE PROSPECTS FOR 2000**  
10:15 *Arlington Ballroom*  
**Moderator: Deputy Secretary of Agriculture**  
**Richard Rominger**
- U.S. and World Agricultural Prospects**  
**Keith Collins, Chief Economist, USDA**
- Agricultural Trade Prospects**  
**August Schumacher, Under Secretary for Farm and Foreign Agricultural Services, USDA**
- 10:15 **COFFEE BREAK**  
*Arlington Ballroom Foyer*
- 10:30- **THE FUTURE OF BIO-ENGINEERED FARM**  
12:00 **PRODUCTS**  
*Arlington Ballroom*  
**Moderator: Rick Weiss, Washington Post Science Writer**
- Consumer and Environmental Concerns**  
**Jane F. Rissler, Senior Staff Scientist, Agriculture and Biotechnology Program, Union of Concerned Scientists**
- Perspective from Europe**  
**Willy De Greef, Head of Regulatory and Government Affairs, Novartis Seeds, AG**
- International Trade Issues**  
**Carole L. Brookins, Chaiman and Chief Executive Officer, World Perspectives, Inc.**
- How Grain Shipping and Processing Firms Are Handling Genetically Enhanced Crops**  
**Daniel P. Dye, Vice President, North American Grain Group, Cargill, Inc.**
- A Farmer's Perspective on Biotechnology Issues**  
**Douglas D. Boisen, President, Boisen Farms, Inc., Minden, Nebraska**
- Federal Government Perspective on Regulatory Issues**  
**Michael V. Dunn, Under Secretary for Marketing and Regulatory Programs, USDA**
- 12:00- **FARMING IN THE NEW MILLENNIUM**  
1:00 *Arlington Ballroom*  
**Moderator: Max Armstrong, U.S. Farm Report, WGN Agriculture Broadcaster**
- Crop Farming in the New Millennium**  
**Don B. Villwock, Crop Producer; President, Villwock Farms, Edwardsport, Indiana**
- Livestock Production in the New Millennium**  
**J. David Nichols, Livestock Producer; Managing Partner; Nichols Farms, Bridgewater, Iowa**
- 1:00 **NETWORKING LUNCHEON**  
*Salons I and II, and Salon K, Grand Ballroom*
- 1:00- **FOOD PRICE BRIEFING**  
1:45 *Salon V*  
**The 2000 Outlook for Retail Food Prices**  
**Annette L. Clauson, Agricultural Economist, Economic Research Service, USDA**
- 2:15 **EXHIBITS OPEN**
- CONCURRENT SESSIONS**
- 2:15- **LONG-TERM COMMODITY PROSPECTS**  
3:45 *Salon III*  
**Moderator: I. Miley Gonzalez, Under Secretary for Research, Education, and Economics, USDA**
- USDA Baseline Projections**  
**Neilson C. Conklin, Director, Market and Trade Economics Division, Economic Research Service, USDA**
- Issues with U.S. Long-Term Projections**  
**Gary Mitchell Adams, Program Director for Crops Analysis, Food and Agricultural Policy Research Institute, University of Missouri**
- Comment on the International Food Situation**  
**Mark W. Rosegrant, Senior Research Fellow, Environmental and Production Technology, International Food Policy Research Institute**
- 2:15- **THE PROS AND CONS OF PRODUCTION AND**  
3:45 **MARKETING CONTRACTS**  
*Salon IV*  
**Moderator: Joseph W. Glauber, Deputy Chief Economist, USDA**
- Legal Issues in Negotiating Production Contracts**  
**Neil D. Hamilton, Ellis and Nelle Levitt Distinguished Professor of Law and Director, Agricultural Law Center, Law School, Drake University**
- Poultry Growers Needs in Contracts**  
**Alfred R. Million, Owner, Million Farms, Tahlequah, Oklahoma**

**Production and Marketing Agreements – Do They Work?**

**Wayne N. Snyder**, *Vice President, Refrigerated Meats and Livestock Production, Farmland Industries*

**Pros and Cons of Production Marketing Contracts**

**Doug A. McNeely**, *Director of Operations, Optimum Quality Grains L.L.C.*

**Lessons from the Hog Industry’s Experience with Contracting**

**Jon D. Caspers**, *Pork Producer and Board Member, National Pork Producers Council*

**2:15- 3:45 FARM INCOME AND FINANCE OUTLOOK**

Salon V

**Moderator: James C. Webster**, *Editor, The Webster Agricultural Letter*

**Farm Financial Prospects: What’s Ahead for Farm Businesses by Type and Region of the Country**

**Mitchell J. Morehart**, *Agricultural Economist, Economic Research Service, USDA*

**Structural Change: Farm and Financial Dimensions**

**David H. Harrington** and **Steven R. Koenig**, *Agricultural Economists, Economic Research Service, USDA*

**Rural Credit Markets of the Future: Obstacles and Opportunities**

**Alan Dean Barkema**, *Vice President and Economist, Center for the Study of Rural America, Federal Reserve Bank of Kansas City*

**2:15- 3:45 RURAL AMERICA IN THE NEW MILLENNIUM**

Salon VI

**Moderator: Betsey A. Kuhn**, *Director, Food and Rural Economics Division, Economic Research Service, USDA*

**Where Is Rural America Heading?**

**John B. Cromartie**, *Geographer, Economic Research Service, USDA*

**Panel Discussion: Policies and Programs for the Future**

**Bo Beaulieu**, *Director, Southern Rural Development Center*

**William S. Patrie**, *Rural Development Director, North Dakota Association of Rural Electric Cooperatives*

**Priscilla Salant**, *Adjunct Faculty, Department of Agricultural Economics, Washington State University*

**3:45 REFRESHMENT BREAK**

*Arlington Ballroom Foyer*

**CONCURRENT SESSIONS**
**4:00- 5:30 BIOTECHNOLOGY ISSUES FOR U.S. AGRICULTURE**

Salon III

**Moderator: Michael V. Dunn**, *Under Secretary for Marketing and Regulatory Programs, USDA*

**Scientific Issues for Growing Genetically Engineered Crops**

**Clifford J. Gabriel**, *Deputy to the Associate Director for Science, White House Office of Science and Technology*

**Regulatory Issues**

**James White**, *Senior Operations Officer, Plant Protection and Quarantine, Animal and Plant Health Inspection Service, USDA*

**Testing for Biotechnology-Enhanced Grains and Oilseeds**

**David R. Shipman**, *Deputy Administrator, Grain Inspection, Packers and Stockyards Administration, USDA*

**Requirements and Limitations for Bt Crops in 2000**

**Phil Hutton**, *Chief, Microbial Pesticides Branch, Biopesticide and Pollution Prevention Division, Environmental Protection Agency*

**4:00- 5:30 CONCENTRATION AND STRUCTURAL CHANGE IN AGRICULTURE**

Salon IV

**Moderator: Enrique E. Figueroa**, *Deputy Under Secretary for Marketing and Regulatory Programs, USDA*

**Concentration in Agribusiness**

**James M. MacDonald**, *Agricultural Economist, Economic Research Service*

**Role and Limitations of Antitrust in Addressing Concerns about Consolidation**

**Douglas Ross**, *Special Counsel for Agriculture, Antitrust Division, U.S. Department of Justice*

**Beyond Antitrust – The Case for Change**

**Peter C. Carstensen**, *Associate Dean and Young-Bascom Professor of Law, University of Wisconsin Law School*

**Beyond Antitrust – The Case for the Status Quo**

**Frederick R. Warren-Boulton**, *Principal, Microeconomic Consulting and Research Associates, Inc.*

**4:00- 5:30 WORLD TRADE ORGANIZATION OUTLOOK: NEW NEGOTIATIONS AND NEW MEMBER NATIONS**

Salon V

**Moderator: Timothy J. Galvin**, *Administrator, Foreign Agricultural Service, USDA*  
**Conclusions to the Seattle Ministerial and the Opportunities for New Negotiations**



**U.S. Permanent Normal Trade Relations for China and Opportunities of Expanded WTO Membership**  
**The Honorable Joseph W. Prueher, U.S. Ambassador to the Peoples Republic of China**

**The Perspectives of the Americas on New Negotiations and New Member Nations**  
**Jose Andres Casco Flores, Under Secretary of Agriculture for Policy and Planning, Secretariat of Agriculture and Rural Development of Mexico**

**Panel on the U.S. Agribusiness Perspective**

**Ann M. Veneman, Partner, Nossaman, Guthner, Knox and Elliott; and former Secretary of Food and Agriculture for California**

**Janet A. Nuzum, Vice President and General Council, International Dairy Foods Association**

4:00-5:30 **FARMING STRATEGIES FOR WEATHERING TOUGH TIMES**  
*Salon VI*  
**Moderator: Charles W. Laughlin, Administrator, Cooperative State Research, Education, and Extension Service, USDA**

**Positive Aspects of Value-Added Agriculture**  
**Steven H. Core, General Manager, Corn Plus**

**The Impact of Precision Agriculture Strategies**  
**John B. Solie, Professor, Biosystems and Agricultural Engineering Department, Oklahoma State University**

**Building Markets for Small, Black, Independent Farmers**  
**Anjanette Billups, Assistant Outreach Coordinator for Alabama, Natural Resources Conservation Service, USDA**

**Improving Financial Performance by Crop Diversification**  
**Richard H. Wahl, Extension Association Economist, Kansas Farm Management Association, N.W.**

5:30 **CASH BAR**  
*Arlington Ballroom Foyer*

6:30 **FORUM DINNER**  
*Salons I, II and III*  
**Farm and Trade Policy: The Outlook for the Year 2000 and Beyond**  
**William G. Leshner, President, Leshner & Russell, Inc.**

**FRIDAY, FEBRUARY 25**

7:00 **REGISTRATION OPENS**  
*Arlington Ballroom Foyer*

7:15 **CONTINENTAL BREAKFAST**  
*Arlington Ballroom Foyer*

**EXHIBITS OPEN ALL DAY**

**CONCURRENT SESSIONS**

8:00-9:30 **THE OUTLOOK FOR COTTON AND FIBERS, PART 1: DOMESTIC AND FOREIGN PROSPECTS**  
*Salon I*  
**Moderator: David C. Camp, Domestic Sales Manager, Staple Cotton Cooperative Association**

**USDA Outlook for Cotton**  
**Andrew Levin, Agricultural Economist, Foreign Agricultural Service, USDA; and Stephen A. MacDonald and Leslie A. Meyer, Agricultural Economists, Economic Research Service, USDA**

**Trends in Foreign Production and Consumption**  
**Ray Butler, Chief Editor, Cotton Outlook**

**The Outlook for U.S. Cotton Consumption**  
**Mark A. Messura, Senior Director, Corporate Planning and Program Development, Cotton Incorporated**

**The Outlook for U.S. Cotton Production: Indications from AFPC's Representative Farms**  
**Edward G. Smith, Distinguished Roy B. Davis Professor of Agricultural Cooperation and Extension Economist, Texas A&M University**

8:00-9:30 **THE OUTLOOK FOR GRAINS AND OILSEEDS**  
*Salon III*  
**Moderator: David C. Lyons, Vice President for Government Relations, Louis Dreyfus Corporation**

**USDA Outlook for Grains and Oilseeds**  
**Thomas F. Tice, Agricultural Economist, Farm Service Agency, USDA**

**Industry Analyst Outlook**  
**William G. Lapp, Vice President of Economic Research, ConAgra, Inc.**

**The Economic Environment for U.S. Soybean Growers**  
**Richard C. Pottorff, Vice President and Chief Economist, Doane Agricultural Services**

8:00-9:30 **THE OUTLOOK FOR LABOR-INTENSIVE AGRICULTURE**  
*Salon IV*  
**Moderator: Juan Martinez, National Farm Worker Coordinator, Office of Outreach, USDA**

**The Outlook for Farm Workers**

**Delores Huerta**, *Vice President, United Farm Workers of America*

**Labor Shortages and Proposed Legislation**

**Robert Phillip Roy**, *President and General Counsel, Ventura County Agricultural Association*

**INS Interior Enforcement and Operation Vanguard**

**Carl W. Hampe**, *Attorney, Paul, Weiss, Riskind, Wharton & Garrison; Washington Representative, IBP, Inc.*

**Transformation of Rural America: New Latino Communities in Agricultural Regions**

**Victor Garcia**, *Associate Professor, Department of Anthropology, Indiana University of Pennsylvania*

**8:00-9:30 THE TRADE POTENTIAL OF SUB-SAHARAN AFRICA**

*Salon V*

**Moderator: James W. Schroeder**, *Deputy Under Secretary for Farm and Foreign Agricultural Services, USDA*

**A Legislative Perspective: Growth and Opportunity in Africa**

**The Honorable Jim McDermott**, *Representative of the Seventh District of Washington*

**Panel on Market Development Prospects in Sub-Saharan Africa**
**African Economic Progress**

**His Excellency Kobina Arthur Koomson**, *Ambassador of Ghana to the United States*

**Partnership for Economic Growth and Opportunity in Africa**

**Rosa Whitaker**, *U.S. Trade Representative for Africa, Office of the United States Trade Representative*

**Successful Trading and Investment in Africa**

**Ralph Moss**, *Director of Government Affairs, Seaboard Corporation*

**Leveraging U.S. Government Investment and Development Funds for Market Development**

**Mark Condon**, *Vice President, American Seed Trade Association*

**8:00-9:30 THE DAIRY OUTLOOK**

*Alexandria Room, Second Floor*

**Moderator: Bob Yonkers**, *Chief Economist and Director of Policy Analysis, International Dairy Foods Association*

**The U.S. Dairy Outlook**

**James J. Miller**, *Agricultural Economist, Economic Research Service, USDA*

**U.S. Top Dairies: Benchmarks for Success**

**Mark W. Stephenson**, *Senior Extension Associate, Agricultural, Resource and Managerial Economics, Cornell University*

**9:30 COFFEE BREAK**  
*Arlington Ballroom Foyer*

**CONCURRENT SESSIONS**

**10:00-11:30 THE OUTLOOK FOR COTTON AND FIBERS, PART 2: FOCUS ON CHINA**

*Salon I*

**Moderator: David C. Camp**, *Domestic Sales Manager, Staple Cotton Cooperative Association*

**The Effects of China's Cotton Reforms on Price Formation, Production and Trade**

**Ding Haowu**, *Executive Manager for Marketing, China National Cotton Exchange; translation provided by Hsu Hsin-Hui, Economic Research Service, USDA*

**10:00-11:30 NEW MARKETS FOR BIO-BASED ENERGY AND INDUSTRIAL FEED STOCKS**

*Salon III*

**Moderator: Roger Conway**, *Director, Office of Energy Policy and New Uses, USDA*

**Looking to the Future of Bio-based Products**

**Henry C. Kelly**, *White House Office of Science and Technology Policy*

**Bio-diesel: Will There Be Enough?**

**John B. Campbell**, *Vice President, Industrial Products, Ag Processing, Inc.*

**Prospects for the Ethanol Industry in the New Millennium**

**Eric Vaughan**, *President, Renewable Fuels Association*

**Bio-based Fuels Initiative: Blue Sky or Opportunity?**

**Lynn Jensen**, *President, National Corn Growers Association*

**A Skeptical View of Prospects for Energy from Bio-mass**

**Bob Slaughter**, *General Counsel, National Petrochemicals and Refiners Association*

**10:00-11:30 MANDATORY LIVESTOCK PRICE REPORTING: IMPLEMENTATION AND IMPACT**

*Salon IV*

**Moderator: James G. Robb**, *Center Director, Livestock Marketing Information Center*

**USDA's Implementation of New Livestock Price Reporting Rules**

**Kenneth C. Clayton**, *Associate Administrator, Agricultural Marketing Service, USDA*



**The Potential Benefits of Mandatory Price Reporting**

**Jon D. Caspers**, *General Manager, Pleasant Valley Pork Corporation*

**The Potential Drawbacks of Mandatory Price Reporting**

**John S. Nalivka**, *President and Owner, Sterling Marketing, Inc.*

10:00-11:30 **PRODUCE MARKETING INFORMATION IN THE INTERNET AGE**

*Salon V*

**Moderator: Darla K. Amstein**, *Managing Editor, The Packer*

**Re-inventing the Produce Industry**

**Charles H. James III**, *Chief Executive Officer, ProduceOnline.Com, Inc.*

**New Markets through Electronic Commerce**

**Henry R. Lambert**, *President, North America, efdex inc.*

**The Role of AMS in Facilitating Electronic Commerce**

**Terry C. Long**, *Chief, Market News Branch, Agricultural Marketing Service, USDA*

10:00-11:30 **THE OUTLOOK FOR SUGAR AND SWEETENERS**

*Alexandria Room, Second Floor*

**Moderator: Carol M. Brick-Turin**, *President, CBT Consulting*

**Sweeteners in the World Trade Organization Negotiations**

**Dale E. McNeil**, *Partner, Ablondi, Foster, Sobin and Davidow, P.C.*

**USDA Outlook for U.S. Sugar in 2000/01**

**Dan Colacicco**, *Agricultural Economist, Farm Service Agency, USDA*

**The Future of the U.S. Sugar Industry in a Changing Policy Environment**

**Benjamin A. Goodwin**, *Executive Manager, California Beet Growers Association, Ltd.*

10:00-11:30 **THE GLOBAL FOOD MARKET IN THE 21ST CENTURY**

*Salons H and J, Grand Ballroom*

**Moderator: John R. Block**, *President, Food Distributors International*

**Consolidation of the U.S. Food Export Industry**

**Lance Pierce**, *Manager, Global Business Development, Roper Starch Worldwide, Inc.*

**Trends in the Retail Food Industry**

**Tony Palazzo**, *Key Account Retail Analyst, Management Ventures, Inc.*

**Changes in the Food Chain**

**Colby Horn**, *Product Manager, Wal-Mart Supercenter Division, Wal-Mart Stores, Inc.*

**Challenges to Exports from a Senate Agriculture Committee Perspective**

**Keith Luse**, *Staff Director, Senate Committee on Agriculture, Nutrition and Forestry*

11:30 **CASH BAR**

*Arlington Ballroom Foyer*

12:10-1:45 **LUNCHEONS**

**GRAINS AND OILSEEDS LUNCHEON**

*Salons I and II*

**Moderator: Patrick A. Packnett**, *Agricultural Economist, Foreign Agricultural Service, USDA*

**Challenges Facing the U.S. Oilseeds and Grain Industries in 2000 and Beyond - Global Market Access**

**Albert J. Ambrose**, *Vice President, Oilseeds Product Line - Aligned Grain Group, Cenex Harvest States, and Chairman, National Oilseeds Processors Association*

**LIVESTOCK AND POULTRY LUNCHEON**

*Salon IV*

**Moderator: James R. Baker**, *Administrator, Grain Inspection, Packers and Stockyards Administration, USDA*

**The Livestock and Poultry Outlook for 2000 and Beyond**

**Shayle D. Shagam**, *Senior Livestock Analyst, World Agricultural Outlook Board, USDA*

**SUGAR AND SWEETENERS LUNCHEON**

*Salon V*

**Moderator: Keith Kelly**, *Administrator, Farm Service Agency, USDA*

**Sugar Trade Policy: A View from the Hill**

**Tom Mahr**, *Legislative Director for Senator Kent Conrad of North Dakota*

**COTTON LUNCHEON**

*Salon VI*

**Moderator: Charles V. Cunningham**, *President, Cunningham & Associates*

**Marketing Cotton in the Year 2000: Reflections of an Independent Merchant**

**Stuart H. Frazer**, *President, Production Marketing, L.L.C.*

**FRUIT AND VEGETABLES LUNCHEON**

*Salons H and J, Grand Ballroom*

**Moderator: Kathleen A. Merrigan**, *Administrator, Agricultural Marketing Service, USDA*



**Organics...Yesterday, Today, and Tomorrow**  
**Lawrence Jacobs**, *CEO, Jacobs Farm/Del Cabo, Inc.*

2:00- **THE CHANGING MARKET FOR ORGANIC**  
 3:30 **FOODS**  
*Salon V*

**CONCURRENT SESSIONS**

**Moderator: Robert J. Scowcroft**, *Executive Director, Organic Farming Research Foundation*  
**Organic Agriculture Meets the 21st Century**

2:00- **THE POTENTIAL IMPACT OF ELECTRONIC**  
 3:30 **COMMERCE ON AGRICULTURE AND RURAL**  
**AMERICA**

*Salon III*  
**Moderator: Randall E. Torgerson**, *Deputy Administrator for Cooperative Services, Rural Business-Cooperative Service, USDA*

**Organic Producers and Cooperatives Respond to Changing Consumer Demand**  
**Tonya A. Pavich**, *Vice President, Organic Sales, Natural Selection Foods*

**Electronic Commerce and Rural Economic Development**  
**William A. Bomash**, *Information Technology Leader, Communications and Technical Services, University of Minnesota*

**Retail Innovation in Organic Marketing**  
**J.B. Pratt**, *Chief Executive Officer, Pratt Foods*

**Selling Produce on the Internet**  
**Gordon Hunt**, *Executive Vice President, eFruit International, Inc.*

**Venture Capital in Organic Marketing**  
**Brooks Browne**, *President, Environmental Enterprises*

**The Electronic Exchange: Marketplace of the Future**  
**Frank Tomasino**, *Chief Executive Officer, Foodtrader.com*

2:00- **U.S. AND INTERNATIONAL TOBACCO**  
 3:30 **OUTLOOK**  
*Alexandria Room, Second Floor*  
**Moderator: Daniel J. Stevens**, *Agricultural Economist, Farm Service Agency, USDA*

**E-Commerce and the 21st Century Agribusiness Leader**  
**Mary Thompson**, *Features Editor, Farm Journal* and  
**Matthew J. Christoff**, *Co-director of the Global Agribusiness Practice of Spencer Stuart*

**The Outlook for Tobacco**  
**Thomas C. Capehart, Jr.**, *Agricultural Economist, Economic Research Service, USDA*

2:00- **NUTRIENT MANAGEMENT POLICIES:**  
 3:30 **BALANCING LIVESTOCK PRODUCTION WITH ENVIRONMENTAL QUALITY**

*Salon IV*  
**Moderator: Thomas W. Christensen**, *Director, Animal Husbandry and Clean Water Programs Division, Natural Resources Conservation Service, USDA*

**The Future of U.S. Tobacco Production**  
**Arnold Hamm**, *Assistant General Manager, Flue-Cured Tobacco Cooperative Stabilization Corporation*

**The Policy Context for Animal Waste Management**  
**Patricia E. Norris**, *Associate Professor, Natural Resource Economics, Michigan State University*

**USDA Outlook for Tobacco Trade**  
**Peter W. Burr**, *Agricultural Economist, Foreign Agricultural Service, USDA*

**USDA Initiatives**  
**Glenda Humiston**, *Deputy Under Secretary for Natural Resources and Environment, USDA*

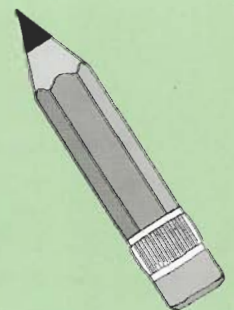
**Industry Outlook for Tobacco Trade**  
**J.T. Bunn**, *Executive Vice President, Leaf Tobacco Exporters Association and Executive Vice President, Tobacco Association of United States*

**State Initiatives**  
**Thomas W. Simpson**, *Coordinator, Chesapeake Bay Agricultural Programs, University of Maryland and Maryland Department of Agriculture*

**Private Sector Initiatives**  
**Thomas R. Hebert**, *Partner, Capitolink LLC*

3:30 **ADJOURN**

**W**e appreciate your candid assessment of the Outlook Forum. An evaluation form is in your portfolio. Please complete it and place in the bowls provided or return to any staff member. *Thank You!*



**USDA's Marketing and Regulatory Programs**  
Specialists from the Agricultural Marketing Service, the Animal and Plant Health Inspection Service, and the Grain Inspection, Packers and Stockyards Service will discuss their programs and answer your questions.

#### Economic Research Service

Publications and data from USDA's Economic Research Service. ERS is a primary source of economic analysis on issues related to agriculture, food, the environment, and rural development. Reports on the Internet will be featured.

#### National Agricultural Statistics Service

Statistical data relate to crop production forecasts, livestock inventories and production, prices of farm inputs and products sold. The 1997 Census of Agriculture provides comprehensive, detailed information for the agriculture sector at the county, state and national levels. Special census studies on irrigation, aquaculture, horticulture and economics are featured.

#### Foreign Agricultural Service

Current publications on the services and activities of the Foreign Agricultural Service. FAS has a wide-ranging mission related to farm trade and international agriculture. Crop condition assessment reports from satellite imagery and remote sensing will be featured.

#### Risk Management Agency

Features the Agency's new website and latest publications to assist producers and agribusinesses in managing production, marketing

and financial risks. For more information on crop insurance or risk management education, check out these resources and chat with our staff.

#### Cooperative State Research, Education, & Extension Service

The National Ag Risk Education Library gives producers and agricultural professionals Internet access to over 1,100 documents providing information, tools, and assistance on specific risk management topics. The Library's developer, University of Minnesota's Center for Farm Financial Management, will also display FINPACK farm financial planning software and Marketeer, new market planning software.

#### National Agricultural Library

The National Agricultural Library is the largest agricultural library in the world and a primary resource within the United States.

#### Rural Business-Cooperative Service

The exhibit features popular publications on successful creation and operation of rural cooperatives, including "Cooperatives 101," "How to Start a Cooperative," and "Sample Legal Documents for Cooperatives."

#### EPA Agriculture Compliance Assistance Center

The Ag Center provides comprehensive, easy-to-understand information about approaches to compliance that are both environmentally protective and agriculturally sound.

 Get Timely News from Agricultural Outlook Forum 2000

#### Web



Starting March 1, speeches presented at the Forum will be posted on the Internet and distributed by e-mail. New long-term projections will be published on the Internet and in print.

#### Download Speeches from the Web:

Starting March 1, go to <http://www.usda.gov/oce>, click on the Forum logo, then click "Read Forum Speeches" to view or download speech texts and slide presentations.

**Get Speeches By E-Mail:** Sign up now for this free service – missed speeches will not be resent. Delivery will begin about March 1 and continue as additional speeches are received from presenters. Speeches will be mailed in text format without tables or illustrations.

**Signup by Web:** Go to <http://usda.mannlib.cornell.edu>. Click "Reports by E-mail" button. Click "Go to subscription page," enter your e-mail

address, click "Continue," scroll to bottom of page and check box next to "Proceedings of the agricultural outlook forum." Click "Submit."

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**Full Proceedings:** When all speeches have been posted, a full proceedings will be published electronically in Adobe Acrobat format at AgEcon Search, a literature library at the University of Minnesota. Go to: <http://agecon.lib.umn.edu> and browse "Select an institution" for the Forum proceedings.

**Long-Term Projections Report:** USDA will release USDA Agricultural Baseline Projections to 2009 at the Forum. To access the report on the Internet, go to <http://www.usda.gov/oce/waob/oc2000/projections.htm>  
To order a printed copy call 1-800-999-6779 or write to ERS-NASS, 5285 Port Royal Road, Springfield, VA 22161. Request advance purchase Item WAOB-2000-1. \$26.00, shipping included to U.S., Canada, Mexico. Off press about March 1.

#### E-Mail



#### Reports



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