

# PROGRAM

## Agricultural Outlook Forum 2003



February 20-21, 2003  
Crystal Gateway Marriott Hotel  
Arlington, Virginia

*Program Preview, see page 3  
Exhibits, see page 9*

*Streaming video of plenary  
sessions will be webcast at  
[www.usda.gov/oce](http://www.usda.gov/oce)*

# Competing in the 21<sup>ST</sup> Century

*Regulations*  
*Urbanization*  
*Market Access*  
*Farm Programs*  
*Foreign Competition*  
*Biotechnology*  
*Diets*  
*Changing*  
*Safely*  
*Food*



# General Information

## Welcome to the Forum

The U.S. Department of Agriculture welcomes you to Agricultural Outlook Forum 2003. 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 convenient to underground shops and to the Fashion Center Mall at Pentagon City.

## Parking

Parking will be discounted to \$8.00 per day for hotel guests and Forum attendees. When you exit each day, you must show your conference badge and request the discounted rate.

## Calls to the Conference

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.

## Registration

The Forum registration desk will be located in the Arlington Ballroom Foyer.

If you did not pay the advance registration fee, you will be asked to pay an on-site registration fee of \$295 for full registration, or \$220 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.

## Dinner and Luncheon Tickets

Prepaid tickets are required for the Thursday networking luncheon and dinner, and the luncheons on Friday. If you preregistered and ordered meals, your tickets will be 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.*

## Video Webcast

A delayed video webcast of Thursday morning plenary sessions and the Thursday afternoon Roundtable of Farm Organizations will be available for viewing at [www.usda.gov/oce](http://www.usda.gov/oce).

## Cell Phone Users Please Note

As a courtesy to other guests, please turn cell phones off during sessions and refrain from placing calls outside of meeting rooms. *The Grand Ballroom foyer in front of the Exhibit Hall, by the windows, has good cell phone reception.*

## Speech Texts and Proceedings

Copies of advance texts provided by speakers will be placed on tables outside 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 11.

## Magazine Debut Thursday

Thursday, 1:10 p.m., Arlington Ballroom, Salon V. USDA's Economic Research will unveil a new flagship publication. Stop by to learn more and pick up a free copy of the premier issue.

## Exhibit Hall

Take a break at the Exhibit Hall, located in Salons F, G and H of the Grand Ballroom. Network or visit over complimentary refreshments, and watch the Beagle Brigade in action.

Eighteen agencies are displaying information about their programs and many are demonstrating Internet resources. See page 9 for details. The Exhibit Hall is open Thursday afternoon and evening, and Friday.



## Press Room

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

## Give Us Your Feedback

We appreciate your candid assessment of the Outlook Forum. Complete the evaluation form in your portfolio and return it on Friday to the registration desk for a thank-you gift.



# Program Preview



## WEDNESDAY, FEBRUARY 19, 2003

5:00 p.m. - 8:30 p.m. Registration *Arlington Ballroom Foyer*



## THURSDAY, FEBRUARY 20, 2003

7:00 a.m. - 5:30 p.m. Registration Pre-registered guests: *Arlington Ballroom, Salon II*; Onsite registration: *Arlington Ballroom Foyer*

7:15 - 8:15 a.m. Continental Breakfast *Arlington Ballroom Foyer*

8:30 a.m. **Welcome** **Plenary Sessions, Arlington Ballroom**

8:40 a.m. **2003 Market and Policy Prospects**

9:30 a.m. **Secretary's Keynote Address**

10:00 a.m. **International Economic and Financial Conditions**

10:30 a.m. Refreshment Break *Arlington Foyer*

11:00 a.m. **Distinguished Panel: Competing in the 21st Century**

12:30 p.m. Networking Luncheon *Arlington Ballroom, Salons I-II, and Atrium (Lobby Level)*

12:30 p.m. - 6:30 p.m. Exhibit Hall Open *Grand Ballroom, Salons F, G, and H*

1:10 p.m. **ERS** The Economic Research Service will unveil a new magazine covering food, agriculture, rural America, and the environment. Complimentary copies will be available. *Arlington Ballroom, Salon V*

1:45 p.m.	Central and Eastern Europe: Impact of EU Enlargement on the Export Competitiveness of Agriculture and Food Industries <i>Arlington Ballroom, Salon III</i>	Farm Organization Roundtable on Competing in the 21st Century <i>Arlington Ballroom, Salon IV</i>	Rural Economic Outlook and Implications for Farm Households <i>Arlington Ballroom, Salon VI</i>	Emerging Food Safety Issues in U.S. and Foreign Markets <i>Arlington Ballroom, Salon V</i>	El Niño's Impact on Agriculture <i>Grand Ballroom, Salon A</i>	
3:30 p.m.	Refreshment Break <i>Arlington Foyer and Exhibit Hall Foyer</i>					
3:45 p.m.	Brazil : Competition in Global Markets <i>Arlington Ballroom, Salon III</i>	Livestock Producer Initiatives To Compete in the 21st Century <i>Arlington Ballroom, Salon IV</i>	Putting New Crop Insurance Programs to the Test <i>Arlington Ballroom, Salon VI</i>	Forces Shaping America's Eating Habits <i>Arlington Ballroom, Salon V</i>	Controlling New Invasive and Exotic Pests and Diseases <i>Grand Ballroom, Salon A</i>	The Effects of Transportation on Competitiveness of U.S. Agriculture <i>Grand Ballroom, Salon B</i>
5:30 p.m.	Cash Bar Reception <i>Arlington Foyer and Exhibit Hall Foyer</i>					
6:30 p.m.	Forum Dinner <i>Arlington Ballroom, Salons I, II and III</i> Betsey D. Holden, Co-CEO, Kraft Foods, Inc.					



## FRIDAY, FEBRUARY 21, 2003

7:00 a.m. - 4:00 p.m. Registration *Arlington Foyer*

7:15 a.m. Continental Breakfast *Arlington Ballroom Foyer and Exhibit Hall Foyer*

8:15 a.m.	Outlook for Grains and Oilseeds <i>Arlington Ballroom, Salon III</i>	New Marketable Products from Animal Waste <i>Arlington Ballroom, Salon I</i>	Building Trade Capacity in Developing Countries <i>Arlington Ballroom, Salon V</i>	International Trade Agreements and U.S. Sugar Policy <i>Arlington Ballroom, Salon IV</i>	What's Happening in the Retail Food Sector? <i>Grand Ballroom, Salon B</i>
10:00 a.m.	Refreshment Break <i>Arlington Foyer and Exhibit Hall Foyer</i>			Retail Food Price Briefing, <i>Grand Ballroom, Salon B</i>	
10:30 a.m.	World Trade Organization Agriculture Negotiations: Modalities and Beyond <i>Arlington Ballroom, Salon III</i>	New Conservation Programs and Partnerships <i>Arlington Ballroom, Salon I</i>	Outlook for Cotton and Fibers <i>Arlington Ballroom, Salon V</i>	Outlook for Livestock and Poultry <i>Arlington Ballroom, Salon IV</i>	Transitions in Markets for Agricultural Information <i>Grand Ballroom, Salon B</i>
12:15 p.m.	Cash Bar Reception <i>Arlington Foyer and Exhibit Hall Foyer</i>				
12:45 p.m.	Grains and Oilseeds Luncheon <i>Arlington Ballroom, Salons I and II</i>	Sugar and Sweeteners Luncheon <i>Arlington Ballroom, Salon VI</i>	Cotton and Fibers Luncheon <i>Arlington Ballroom, Salon V</i>	Livestock and Poultry Luncheon <i>Arlington Ballroom, Salon IV</i>	Horticulture Luncheon <i>Grand Ballroom, Salons J and K</i>
2:00 p.m.	Break				
2:15 p.m.	Competition in the Asian Marketplace: Prospects and Constraints <i>Arlington Ballroom, Salon III</i>	Challenges of Complying with Air and Water Quality Regulations <i>Arlington Ballroom, Salon IV</i>	Outlook for Tobacco <i>Grand Ballroom, Salon A</i>	Outlook for Milk and Dairy Products <i>Grand Ballroom, Salon B</i>	Outlook for the Floriculture, Greenhouse and Nursery Industries <i>Grand Ballroom, Salon J and K</i>
4:00 p.m.	Adjourn				

# Forum Program

Wednesday, February 19-  
Thursday, February 20

## WEDNESDAY, FEBRUARY 19, 2003

■ 5:00 ~ 8:30 p.m.  
**REGISTRATION**  
*Arlington Ballroom Foyer*

## THURSDAY, FEBRUARY 20, 2003

■ 7:00 a.m. ~ 5:30 p.m.  
**REGISTRATION**  
*Pre-registered guests: Arlington Ballroom, Salon II*  
*Onsite registration: Arlington Foyer Registration Desk*

■ 7:15 ~ 8:15 a.m.  
**CONTINENTAL BREAKFAST**  
*Arlington Ballroom Foyer*

■ 8:30 a.m. ~ 12:30 p.m.  
**PLENARY SESSIONS**

■ 8:30 a.m.  
**WELCOME**  
*Arlington Ballroom*  
■ James Moseley, Deputy Secretary of Agriculture, USDA

■ 8:40 ~ 9:30 a.m.  
**2003 MARKET AND POLICY PROSPECTS**  
*Arlington Ballroom*

**Moderator**  
■ James Moseley, Deputy Secretary of Agriculture, USDA

**2003 Agricultural Prospects**  
■ Keith Collins, Chief Economist, USDA

**U.S. Trade and Agricultural Policy**  
■ J. B. Penn, Under Secretary for Farm and Foreign Agricultural Services, USDA

■ 9:30 ~ 10:00 a.m.  
**KEYNOTE ADDRESS**  
*Arlington Ballroom*

**Moderator**  
■ James Moseley, Deputy Secretary of Agriculture, USDA

**Keynote Address**  
■ Secretary of Agriculture Ann M. Veneman

■ 10:00 ~ 10:30 a.m.  
**INTERNATIONAL ECONOMIC AND FINANCIAL CONDITIONS**  
*Arlington Ballroom*

■ John Taylor, Under Secretary of Treasury for International Affairs, invited

■ 10:30 ~ 11:00 a.m.  
**REFRESHMENT BREAK**  
*Arlington Ballroom Foyer*

■ 11:00 a.m. ~ 12:30 p.m.  
**DISTINGUISHED PANEL: COMPETITION IN THE 21ST CENTURY**  
*Arlington Ballroom*

### **Moderator**

■ Dan Kelley, Chairman of the Board and President, GROWMARK, Inc.

### **Trade Policy and International Competition**

■ Greg Estep, Senior Vice President and General Manager of International Grain, ConAgra Foods, Inc.

### **Opportunities Created by Changing Consumer and Market Demands**

■ Bruce T. Peterson, Jr., Senior Vice President and Merchandise Manager of Perishables, Wal-Mart Stores, Inc.

### **The Impact of Demands for Environmental Quality in the United States and Elsewhere**

■ Nancy Bryson, General Counsel, USDA

### **How Is the Changing Structure of Farming and Agribusiness Affecting Competitiveness?**

■ John Johnson, CEO, CENEX Harvest States Cooperatives

■ 12:30 p.m.  
**EXHIBIT HALL OPENS**  
*Grand Ballroom, Salons F, G and H*

■ 12:30 ~ 1:45 p.m.  
**NETWORKING LUNCHEON**  
*Arlington Ballroom, Salons I, II, and Atrium (Lobby Level)*

■ 1:10 ~ 1:35 p.m.  
**ERS MAGAZINE DEBUT**  
*Arlington Ballroom, Salon V*  
USDA's Economic Research Service unveils a new publication.

■ 1:45 ~ 3:30 p.m.  
**CONCURRENT SESSIONS**

### **CENTRAL AND EASTERN EUROPE: IMPACT OF EU ENLARGEMENT ON THE EXPORT COMPETITIVENESS OF AGRICULTURE AND FOOD INDUSTRIES**

*Arlington Ballroom, Salon III*

### **Moderator**

■ Robert Curtis, U.S. Agricultural Counselor, U.S. Embassy, Vienna, Austria  
**Profile of a Larger European Community**

### **Overview of EU Enlargement and Its Impact on Primary Commodity Markets**

■ Chris Horseman, News Editor, Agra Europe

### **Changes in Agricultural Production and Trade after Enlargement: The View from Central and Eastern Europe**

■ László Vajda, Director, Department of European Integration, Hungarian Ministry of Agriculture and Rural Development

### **Future Competitiveness of CEEC Packaged Food and Beverage Manufacturers**

■ Anne Nugent, Account Manager, Euromonitor Plc.

### **FARM ORGANIZATION ROUNDTABLE ON COMPETING IN THE 21ST CENTURY**

*Arlington Ballroom, Salon IV*

### **Moderator**

■ Charles Lambert, Deputy Under Secretary for Marketing and Regulatory Programs, USDA

### **PANELISTS:**

■ David J. Frederickson, President, National Farmers Union  
■ Ron Warfield, President, Illinois Farm Bureau  
■ Dan Kelley, Chairman of the Board and President, GROWMARK, Inc.

### **EMERGING FOOD SAFETY ISSUES IN U.S. AND FOREIGN MARKETS**

*Arlington Ballroom, Salon V*

### **Moderator**

■ Elsa Murano, Under Secretary for Food Safety, USDA

### **Emerging Strategies for Managing Food Safety**

■ Frank Busta, Professor of Food Science and Nutrition, University of Minnesota, Retired

### **Food Safety Standards: Trade Barrier or Trade Enhancement?**

■ Laurian J. Unnevehr, Professor, Department of Agricultural and Consumer Economics, University of Illinois

### **Emerging Food Safety Issues and Emerging Global Markets**

■ Ewen C.D. Todd, Director, National Food Safety & Toxicology Center, Michigan State University

### **RURAL ECONOMIC OUTLOOK AND IMPLICATIONS FOR FARM HOUSEHOLDS**

*Arlington Ballroom, Salon VI*

### **Moderator**

■ Thomas D. Rowley, Freelance Writer and Fellow, Rural Policy Research Institute

## Rural America Entering the 21<sup>st</sup> Century: Forces of Change

- Rodney J. Brown, Deputy Under Secretary for Research, Education and Economics, USDA

## Economic Outlook for Farm Households and Their Farming Establishments

- Ashok Mishra, Agricultural Economist, Economic Research Service, USDA

## New Programs To Benefit Rural Households and Businesses

- Thomas C. Dorr, Under Secretary for Rural Development, USDA

## Critical Development Issues in Rural Economies

- Stephan J. Goetz, Professor, Agricultural and Regional Economics, The Pennsylvania State University, and Director of the Northeast Regional Center for Rural Development

## EL NIÑO'S IMPACT ON AGRICULTURE

Grand Ballroom, Salon A

- Thomas Puterbaugh, Deputy Chief Meteorologist, World Agricultural Outlook Board, Office of the Chief Economist, USDA

## The Impact of the El Niño Phenomenon on the United States

- Jim Laver, Director, Climate Prediction Center, National Oceanographic and Atmospheric Administration, U.S. Department of Commerce

## El Niño's Effects on Major World Crop Areas

- Chester Ropelewski, Director of Monitoring and Dissemination, International Research Institute for Climate Prediction, Columbia University

## Monitoring in Real Time: El Niño's Impact on Crops and Commodity Markets

- Gail Martell, President, Martellcropprojections.com

## 3:30 ~ 3:45 p.m. REFRESHMENT BREAK

Arlington Ballroom Foyer and Exhibit Hall Foyer

## 3:45 ~ 5:30 p.m. CONCURRENT SESSIONS

## BRAZIL: COMPETITION IN GLOBAL MARKETS

Arlington Ballroom, Salon III

### Moderator

- William W. Westman, Agricultural Counselor, U.S. Embassy, Brasilia, Brazil

## Paying the Bills in Brazil: Does the IMF's Math Add Up?

- Dean Baker, Co-Director, Center for Economic and Policy Research

## A Private Sector View on Brazil's Competitive Position

- Antonio Sartori, President, BRASOJA Corretora de Cereias Consulting

## Transportation and Logistics in Brazilian Agriculture

- José Vicente Caixeta-Filho, Professor, Department of Agricultural Economics, University of Sao Paulo

## Competitiveness of Brazil's Beef, Pork and Poultry Industries

- Eduardo Leao de Sousa, Head of Agricultural and Agro-industrial Products, Ministry of Finance, Brazil

## LIVESTOCK PRODUCER INITIATIVES FOR COMPETING IN THE 21ST CENTURY

Arlington Ballroom, Salon IV

### Moderator

- Randall Torgerson, Agricultural Economist, USDA, Retired

## Iowa Quality Beef Supply Cooperative Initiative

- Joel Brinkmeyer, President, Iowa Quality Beef Supply Cooperative

## Swine Producers Add a Marketing Department

- Brian Watkins, Chairman, Great Lakes Cooperative

## The Creation of Dakota Lamb Growers Cooperative

- David Merwin, CEO, Dakota Lamb Growers Cooperative

## Establishing Protocols for Certified Organic and Natural Beef

- Diana S. Endicott, Marketing Director, Rainbow Organic Farms

## 2002: PUTTING NEW CROP INSURANCE PROGRAMS TO THE TEST

Arlington Ballroom, Salon VI

### Moderator

- Ross J. Davidson, Jr., Administrator, Risk Management Agency, USDA

## The Federal Crop Insurance Program: Opportunities and Challenges

- Barry J. Barnett, Associate Professor, Department of Agricultural & Applied Economics, University of Georgia

## If Crop Insurance Is Working, Why Do Farmers Need Disaster Assistance?

- G. A. (Art) Barnaby, Jr., Professor, Department of Agricultural Economics, Kansas State University

## Paving the Way for New Livestock Risk Management Tools

- Peter W. Griffin, President, Applied Analytics Group, Inc.

## CONTROLLING NEW INVASIVE AND EXOTIC PESTS AND DISEASES

Grand Ballroom, Salon A

### Moderator

- Anne Vidaver, Head of the Department of Plant Pathology, University of Nebraska

## Invasive Diseases in Animals and Prevention

- Carole Bolin, Section Chief for Bacteriology and Mycology, Diagnostic Center for Animal Health, Michigan State University

## Establishing a Disease Diagnostic Network

- Terry McElwain, College of Veterinary Medicine, Washington State University; Executive Director of the Washington Animal Disease Diagnostic Laboratory; Director of the Animal Health Research Center; and President, Association of American Veterinary Laboratory Diagnosticians

## Invasive Plant Diseases and Pests

- Jacqueline Fletcher, Sarkeys Distinguished Professor, Oklahoma State University, and President, The American Phytopathological Society

## The U.S. Wheat and Barley Scab Initiative: An Unprecedented Multi-lateral Partnership

- Richard Ward, Associate Professor and Wheat Breeder, Michigan State University, and Co-Chair of the U.S. Wheat and Barley Scab Initiative

## THE EFFECTS OF TRANSPORTATION ON COMPETITIVENESS OF U.S. AGRICULTURE

Grand Ballroom, Salon B

### Moderator

- Barbara C. Robinson, Deputy Administrator, Transportation and Marketing Programs, Agricultural Marketing Service, USDA

## Transportation's Role in Competing in Global Agricultural Markets

- Bill Motes, Senior Vice President, Sparks Companies, Inc.

## The Role of Water Transportation in U.S. Competitiveness

- Christopher J. Brescia, President, Midwest Area River Coalition 2000 (MARC 2000)

## Rail Services and Capacity Effects on Agriculture

- Gene Griffin, Director, Upper Great Plains Transportation Institute, North Dakota State University

## Importance of Intermodal Connectivity and Bottleneck Elimination

- Barry Prentice, Director, Transport Institute, and Associate Professor, Department of Agricultural Economics, University of Manitoba

## FORCES SHAPING AMERICA'S EATING HABITS

Arlington Ballroom, Salon V

### Moderator

- Brenda S. Lisi, Assistant to the Deputy Administrator for Special Nutrition Programs, Food and Nutrition Service, USDA

## Food Consumption in America: Looking Ahead to 2020

- James Blaylock, Associate Director, Food and Rural Economics Division, Economic Research Service, USDA

## Food Politics: How the Food Industry Influences Obesity

- Marion Nestle, Professor and Chair, Department of Nutrition and Food Studies, New York University

## Initiatives and Partnerships in Influencing America's Diet

- Barbara T. Berry, Vice President for Programs, Produce for Better Health Foundation

## How Is the Food Service Sector Responding to Health and Demographic Trends?

- Sheila R. Cohn, Manager, Nutrition Policy, Health and Safety Regulatory Affairs, National Restaurant Association

## 5:30 - 6:30 p.m. CASH BAR RECEPTION

Arlington Foyer and Exhibit Hall Foyer

## 6:30 p.m. FORUM DINNER

Arlington Ballroom, Salons I, II, and III

### Introduction

- Ann M. Veneman, Secretary of Agriculture

## Competing in the 21st Century

- Betsy D. Holden, Co-CEO of Kraft Foods, Inc. and President and CEO of Kraft Foods North America



## FRIDAY, FEBRUARY 21, 2003

### 7:00 a.m. - 4:00 p.m. REGISTRATION

Arlington Foyer Registration Desk

### 7:15 a.m. - 2:15 p.m. EXHIBIT HALL OPEN

Grand Ballroom, Salons F, G, and H

### 7:15 - 8:15 a.m. CONTINENTAL BREAKFAST

Arlington Ballroom Foyer and Exhibit Hall Foyer

### 8:15 - 10:00 a.m. CONCURRENT SESSIONS

## NEW MARKETABLE PRODUCTS FROM ANIMAL WASTE

Arlington Ballroom, Salon I

### Moderator

- Lawrence E. Clark, Deputy Chief for Science and Technology, Natural Resources Conservation Service, USDA

## Potentials for Energy from Animal Manure Digesters

- Dennis D. Haubenschild, President, Haubenschild Farm, Inc., Princeton, Minnesota

## Commercial Fertilizer from Poultry Litter: The Case of Harmony Products

- Vernon Meacham, Vice President of Technology, Harmony Products, Inc.

## Thinking Outside the Box: Building Materials and other Products from Animal Processed Fiber

- Tom L. Richard, Professor, Agricultural and Biosystems Engineering, Iowa State University

## OUTLOOK FOR GRAINS AND OILSEEDS

Arlington Ballroom, Salon III

### Moderator

- Verle Lanier, Associate Administrator for Operations and Management, Farm Service Agency, USDA

## USDA Outlook for Grains and Oilseeds in 2003

- Peter Riley, Agricultural Economist, Farm Service Agency, USDA

## Private Sector Outlook for Grains and Oilseeds in 2003

- Dale Gustafson, Senior Grain and Oilseed Analyst, Salomon Smith Barney

## The Impact of Growing Ethanol Byproduct Production on Livestock Feed Markets

- John Urbanchuk, Director, Agriculture S&O, LEGC, LLC

## INTERNATIONAL TRADE AGREEMENTS AND U.S. SUGAR POLICY

Arlington Ballroom, Salon IV

### Moderator

- James Grueff, Assistant Deputy Administrator, International Trade Policy, Foreign Agricultural Service, USDA

## Implementation of U.S. Sugar Policy and Trade Agreement Effects

- Jack Roney, Director of Economics and Policy Analysis, American Sugar Alliance

## Trade Agreements: Impact on U.S. Sugar

- Donald M. Phillips, Trade Advisor, American Sugar Alliance

## U.S.-Mexican Sweeteners Issues for Sugar Producers

- Donald W. Carson, Executive Vice President, Florida Crystals Corporation, and Vice Chairman, American Sugar Refining Co. (Domino)

## U.S.-Mexican Sweeteners Issues for Corn Refiners

- J. Patrick Mohan, Chairman, Corn Refiners Association, Inc., and President of Support Services, Tate & Lyle North America, Inc.

## BUILDING TRADE CAPACITY IN DEVELOPING COUNTRIES

Arlington Ballroom, Salon V

### Moderator

- Ellen Terpstra, Administrator, Foreign Agricultural Service, USDA

## Meeting the Challenges in Developing Countries: The Asian Perspective

- Karunathilaka J. Weerasinghe, Minister of Economics and Commerce and Permanent Representative to the World Trade Organization for Sri Lanka

## A Multilateral Development Bank's Role: Latin America and the Caribbean

- Ennio Rodriguez, Principal Economist, Integration and Regional Programs Department, Inter-American Development Bank

## Private Sector Benefits from Trade Capacity Building: A South African Case Study

- R. Brinkley Seward, Director of Membership Development, International Association of Refrigerated Warehouses and the World Food Logistics Organization

## Lessons Learned from U.S. Government Trade Capacity Building Programs

- Suzanne Heinen, Deputy Administrator for International Cooperation and Development, Foreign Agricultural Service, USDA

## WHAT'S HAPPENING IN THE RETAIL FOOD SECTOR?

Grand Ballroom, Salon B

### Moderator

- Ephraim Leibtag, Economist, Economic Research Service, USDA

## Retail Food Stores: Current Practices and Future Trends

- Glen A. Terbeek, Founder, Breakaway Strategies, Inc.

## Technologies for Food Efficiency

- Alan A. Couch, Director of Food Industry Marketing, NCR Corporation

## The Response of U.S. Retail Trends to Changing Consumer Behavior

- Joseph Hall, Former COO of Food Lion and Founder and Director, Joseph Hall Marketing LLC

## ■ 10:00-10:30 a.m.

### BRIEFING ON 2003 RETAIL FOOD PRICES

Grand Ballroom, Salon B

- Ephraim Leibtag, Economist, Economic Research Service, USDA

## ■ 10:00 ~ 10:30 a.m.

### REFRESHMENT BREAK

Arlington Foyer and Exhibit Hall Foyer

## ■ 10:30 a.m. - 12:15 p.m.

### CONCURRENT SESSIONS

## NEW CONSERVATION PROGRAMS AND PARTNERSHIPS

Arlington Ballroom, Salon I

### Moderator

- Bruce Knight, Chief, Natural Resources Conservation Service, USDA

## How Public Sector Technical Service Providers Will Participate

- Gary Mast, First Vice President, National Association of Conservation Districts

## How Private Sector Technical Service Providers Will Participate

- Luther B. Smith, Executive Director, Certified Crop Advisers

## The Promise and Perils of Technical Service Providers

- Craig Cox, Executive Vice President, Soil and Water Conservation Society

## Practical Experiences with the New Programs and Partnerships

- Vanessa L. Bogenholm, Owner, VB Agricultural Services and Farms

## WORLD TRADE ORGANIZATION AGRICULTURE NEGOTIATIONS: MODALITIES AND BEYOND

Arlington Ballroom, Salon III

### Moderator

- To be announced

## U.S. Position and Perspective

- David Hegwood, Special Counsel to the Secretary of Agriculture

## Cairn's Group Position and Perspective: It's Broke. Let's Fix It.

- Derek Leask, Chief Agriculture Negotiator, Ministry of Foreign Affairs and Trade, New Zealand

## Developing Countries' Position and Perspective

- Karunathilaka J. Weerasinghe, Minister of Economics and Commerce and Permanent Representative to the World Trade Organization for Sri Lanka

## OUTLOOK FOR LIVESTOCK AND POULTRY

Arlington Ballroom, Salon IV

### Moderator

- William Hawks, Under Secretary of Agriculture for Marketing and Regulatory Programs, USDA

## The 2003 Outlook for Livestock and Poultry

- Shayle Shagam, Agricultural Economist, World Agricultural Outlook Board, Office of the Chief Economist, USDA

## U.S. Livestock Traceability Developments

- John F. Wiemers, National Animal Identification Coordinator, Animal and Plant Health Inspection Service, USDA

## Canada's Experience with Cattle Identification

- Brad Wildeman, Chairman, Canadian Cattle Identification Agency

## OUTLOOK FOR COTTON AND FIBERS

Arlington Ballroom, Salon V

### Moderator

- Patrick T. McClatchy, Director, Rosenthal Collins Group

## The U.S. and World Cotton Outlook

- Stephen MacDonald, Agricultural Economist, Economic Research Service, USDA

## U.S. Cotton Supply Response under the 2002 Farm Act

- Paul C. Westcott, Agricultural Economist, Economic Research Service, USDA

## Focusing on the Demand Side of the Equation

- Allen A. Terhaar, Executive Director, Cotton Council International

## Trade Policy Developments Affecting Cotton

- Mechel S. Paggi, Director, Center for Agricultural Business, California State University, Fresno

## TRANSITIONS IN MARKETS FOR AGRICULTURAL INFORMATION

Grand Ballroom, Salon B

### Moderator

- Susan Offutt, Administrator, Economic Research Service, USDA

## Farmers' Information Choices: The More Things Change ...

- Steve Custer, Publisher, Farm Journal and Top Producer, Farm Journal Media

## Are Futures Markets More or Less Important in Generating Price Information?

- Scott Irwin, Professor, Department of Agricultural and Consumer Economics and Director of Agricultural Market Advisory Services, University of Illinois

## Integrating Hemispheric Market Information

- Sandra Cuellar, Executive Committee Member and Delegate of Colombia, Market Information Organization of the Americas

## ■ 12:15 ~ 12:45 p.m.

### CASH BAR RECEPTION

Arlington Foyer and Exhibit Hall Foyer

## ■ 12:45 ~ 2:00 p.m.

### LUNCHEONS

## GRAINS AND OILSEEDS LUNCHEON

Arlington Ballroom, Salons I and II

### Moderator

- Margaret Thursland, Agricultural Attache, United States Embassy, Kiev, Ukraine

## The Future of Ukraine's Grain Sector

- Leonid Kozachenko, President, Ukrainian Agrarian Confederation

## LIVESTOCK AND POULTRY LUNCHEON

Arlington Ballroom, Salon IV

### Moderator

- Howard Wetzel, Director, Dairy, Livestock and Poultry Division, Foreign Agricultural Service, USDA

## Dynamics of the Global Poultry Industry

- Eric J. Joiner, President, AJC International, Inc.

## COTTON AND FIBERS LUNCHEON

Arlington Ballroom, Salon V

### Moderator

- Keith Collins, Chief Economist, USDA

## The Changing Landscape of World Textile Trade: Challenges and Opportunities for U.S. Cotton

- Julia Hughes, Vice President, International Trade and Government Relations, U.S. Association of Importers of Textiles and Apparel

## SUGAR AND SWEETENERS LUNCHEON

Arlington Ballroom, Salon VI

### Moderator

- Beth Bechdol, Special Assistant to the Under Secretary for Farm and Foreign Agricultural Services, USDA

## Challenges for Sugar in International Trade Agreements

- Jose A. Orive, Executive Director, Central American Sugar Association

## HORTICULTURE LUNCHEON

Grand Ballroom, Salons J and K

### Moderator

- Neil Conklin, Director, Market, Trade and Economics Division, Economic Research Service, USDA

## Produce Safety: What Impact Does It Have on Your Lunch?

- Jack Guzewish, Director, Emergency Coordination and Response Center for Food Safety and Applied Nutrition, U.S. Food and Drug Administration

■ 2:00 ~ 2:15 p.m.  
BREAK

■ 2:15 ~ 4:00 p.m.  
CONCURRENT SESSIONS

## COMPETITION IN THE ASIAN MARKETPLACE: PROSPECTS AND CONSTRAINTS

Arlington Ballroom, Salon III

### Moderator

- Walter J. Armbruster, President, Farm Foundation

## China Goes Shopping: Do Transportation and Infrastructure Matter?

- William Hall, Partner, Seaport Consultants

## India: Food Markets and the Agribusiness Environment

- Hardeep Singh, President, Indian Sub-Continent, Cargill, Inc.

## Southeast Asia: Globalization of the Retail Sector

- Dee Richmond, Deputy Director, Food Export USA-Northeast

## CHALLENGES OF COMPLYING WITH AIR AND WATER QUALITY REGULATIONS

Arlington Ballroom, Salon IV

### Moderator

- Jean-Mari Peltier, Counselor to the Administrator, U.S. Environmental Protection Agency

## Agriculture: Operating in an Era of Regulation

- Mark D. Jekanowski, Vice President, Sparks Companies, Inc.

## Comparative Standards for Intensive Livestock Operations in Canada, Mexico and the United States

- Timothy P. Whitehouse, Head, Law and Policy Program, North American Commission for Environmental Cooperation

## Air Emissions from Animal Feeding Operations

- Robert Flocchini, Professor, Crocker Nuclear Laboratory, University of California at Davis

## Water Quality Regulation Challenges for Agriculture

- Sandra Batie, Elton R. Smith Professor in Food & Agricultural Policy, Department of Agricultural Economics, Michigan State University

## OUTLOOK FOR TOBACCO

Grand Ballroom, Salon A

### Moderator

- Darryl Jayson, Vice President, Tobacco Merchants Association

## Opportunities for U.S. Tobacco Exports

- Tommy Bunn, Executive Vice President, Leaf Tobacco Exporters Association and Tobacco Association of United States

## Issues Facing U.S. Tobacco Growers

- Will M. Snell, Extension Professor and Agricultural Economist, University of Kentucky

## U.S. Tobacco Situation and Outlook

- Tom Capehart, Senior Economist, Economic Research Service, USDA

## The USDA Tobacco Program

- Dan Stevens, Agricultural Economist, Farm Service Agency, USDA

## OUTLOOK FOR MILK AND DAIRY PRODUCTS

Grand Ballroom, Salon B

### Moderator

- Archie J. Yates, Administrator, Agricultural Marketing Service, USDA

## The 2003 Outlook for Milk and Dairy Products

- Howard McDowell, Senior Economist, Dairy Programs, Agricultural Marketing Service, USDA

## A Producer's Outlook on Competing in a Changing Dairy Sector

- Donald Bennink, North Florida Holsteins, Bell, Florida

## A Cheese Maker's Outlook on Competing in Changing Dairy Markets

- Sue Taylor, Vice President for Dairy Policy and Procurement, Leprino Foods

## OUTLOOK FOR THE FLORICULTURE, GREENHOUSE AND NURSERY INDUSTRIES

Grand Ballroom, Salons J and K

### Moderator

- Steven D. Wiyatt, Director, Statistics Division, National Agricultural Statistics Service, USDA

## Labor Issues in the Floriculture and Nursery and Industries

- Craig J. Reggelbrugge, Senior Director of Government Relations, American Nursery & Landscape Association

## Opportunities and Challenges to Floricultural Producers: Selling to a Changing Marketplace

- Marvin N. Miller, Market Research Manager, Ball Horticultural Company

## Economic and Marketing Issues from a Grower's Perspective

- Robin G. Brumfield, Professor and Extension Specialist in Farm Management, Rutgers, The State University of New Jersey

■ 4:00 p.m.  
ADJOURN



Complete the evaluation form in your portfolio and return it on Friday to the registration desk for a thank-you gift. Or, place the form in a silver bowl or give it to anyone wearing a staff ribbon. THANK YOU!





# Forum 2003 Exhibitors

**Take a break in the Exhibit Hall, located in Salons F, G and H of the Grand Ballroom, where you can network or visit over complimentary refreshments. The Exhibit Hall is open Thursday afternoon and evening, and Friday.**

## **U.S. Trade Database and World Production, Supply, and Distribution (PS&D) Database**

Try out the Foreign Agricultural Service's U.S. Trade database and the Production, Supply, and Distribution (PS&D) database. The trade database is a customized view of U.S. agricultural trade by country, commodity and commodity groups from 1989 to the present. The PS&D database is a repository of official USDA historical commodity and country data, dating back to 1960, as well as a current source for estimates, forecasts of production, supply, and utilization.

## **Foreign Production Estimates and Crop Assessments**

Meet the USDA specialists who prepare foreign crop assessments and production forecasts. The Production Estimates and Crop Assessment Division of USDA's Foreign Agricultural Service is responsible for global crop condition assessments and estimates of area, yield, and production. PECAD uses a convergence of evidence to minimize error and maximize reliability by incorporating information from USDA agricultural attaches, satellite imagery, vegetative indices, daily weather data, crop models, and economic data.

See *Crop Explorer* in action. This free, web-based tool provides crop analysts with timely agro-meteorological data such as precipitation, temperature, and vegetative vigor. Examine worldwide data and research crop conditions in any region of interest.

## **When it Comes to Trade, Think Outside the Borders**

The Foreign Agricultural Service, using the theme "Think Outside the Borders," is conducting outreach to enlist agricultural community interest in exporting, and in USDA export programs and services.

## **Farm Service Agency**

"Preserving the Past, Ensuring the Future of Agriculture" depicts the FSA's move into the 21st century. For more than 70 years, FSA has offered practical, supportive and effective tools aimed at finding a successful balance of profitability and productivity for farmers and ranchers while conserving our land. Staff will be available to answer questions and provide information.

## **Risk Management Agency**

RMA administers the crop insurance program, which helps farmers survive a major crop loss. About two-thirds of the acreage planted to major U.S. crops is insured, and more than 76 crops and many of their varieties are insurable. Coverage is also available on a number of specialty crops and livestock.

With their public and private partners, RMA works to find improved risk management strategies, develop educational curricula and materials, and train producers in effective use of risk management tools.

## **Economic Research Service**

ERS is launching a new magazine at a special event Thursday, February 20 at 1:10 p.m. in Salon V of the Arlington Ballroom. Come get your free copy of the premier issue! Also, stop by the ERS exhibit to subscribe to the print edition of the magazine – the first 100 subscribers receive a free robotic calculator/alarm clock and get \$10 off the annual subscription price.

ERS is the main source of economic information and research from the U.S. Department of Agriculture. ERS provides more than just the economic facts; the agency brings the perspective of economic analysis to many critical issues facing farmers, agribusiness, consumers, and policymakers.

## **National Agricultural Statistics Service and Census of Agriculture**

NASS administers USDA's program for collecting and publishing timely agricultural statistics, releasing more than 400 statistical reports each year. NASS also conducts the 5-year U. S. census of agriculture

—the only source of uniform data on agricultural production and operator characteristics for each county, state, and the United States.

The 2002 Census of Agriculture data collection began December 2002. In addition to agricultural structure data, information will be collected on topics such as multiple operators, computer/Internet use, production contracts/landlord shares, certified organic production, acres treated with manure, and more detailed farm-related income. The 2002 Census will be available on the Internet at [www.usda.gov/nass](http://www.usda.gov/nass) in February 2004.



## **Drought Monitoring and Forecasting at NOAA's Climate Prediction Center**

NOAA's Climate Prediction Center has been producing the consolidated depiction of national drought since the fall of 1999, and the Seasonal Drought Outlook since spring of 2000. The Drought Monitor combines the best available set of drought indices and tweaks the results to reflect ground truth as reported by a nationwide network of drought experts.

To depict drought conditions that better reflect crop conditions over the current growing season, the Drought Monitor consortium has recently developed a blend of shorter-term indicators. The agencies that author the Drought Monitor, NDMC, NOAA/CPC, NOAA/NCDC, and USDA, have recently begun to work with meteorologists from Canada and Mexico to produce monthly demonstration maps of North American drought coverage.

## Forum 2003 Exhibitors (continued)

### USDA Economics and Statistics System at Albert Mann Library, Cornell University

The USDA Economics and Statistics System contains more than 300 reports and datasets from USDA's economics agencies. *The System will soon expand its coverage and introduce new features.* Mann Library staff will be present to discuss new services and to collect your feedback on this popular resource.

### One-Stop Commodity Information Portal Project

How many hours do you spend every month searching the Internet for commodity market information to help you do your job? And when you do find it, how much longer does it take you to download and format the information? *If you've been frustrated by this process, we are interested in hearing from you.*

The World Agricultural Outlook Board, in cooperation with five other USDA agencies, has initiated a project to develop a *One-Stop Commodity Information Portal* that will bring together USDA's commodity-related data and analysis into a single publicly accessible and easy-to-use website. *We need your help to understand the kind of information and tools that will be most valuable to you.* Stop by, complete a brief survey on your commodity information needs, and talk with the project team.

### Natural Resources Conservation Service

*See a demonstration of on-line access to NRCS natural resource conservation technology, especially the Electronic-Field Office Technical Guide.* Internal and external users can access conservation practice standards, guidance documents, databases, computer programs, and other electronic-based materials associated with the Field Office Technical Guides. Publications about conservation of natural resources also will be available.

### Rural Development Mission Area

Stop by to talk with knowledgeable staff and examine a variety of publications about cooperatives. Topics range from "How to Start a Cooperative" to "Agricultural Cooperatives in the 21<sup>st</sup> Century." The latest issue of USDA's "Rural Cooperatives" magazine and brochures on the Business & Industry Guaranteed Loan Program and other USDA Rural Development programs will also be available.

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

CSREES provides program leadership to identify, develop, and manage programs to support university-based and other institutional research, education, and extension. *The National Rural Funders Collaborative (NRFC) is a new initiative to expand the sustainable resource base for rural communities and families over the next 10 years.* CSREES and NRFC are working together in ways that will expand the resources available to rural communities and families and thereby increase the impact and leverage of community-based strategies for rural development.

### Agricultural Marketing Service

AMS administers programs that facilitate the efficient, fair marketing of U.S. agricultural products, including food, fiber, and specialty crops. AMS programs promote a strategic marketing perspective that adapts product and marketing practices and technologies to the issues of today and the challenges of tomorrow.

### Agricultural Research Service – Visions of Agricultural Research

"Visions of Agricultural Research" explores the varied research

activities of USDA's main in-house research agency. Talk with our staff about programs and research projects in agriculture, nutrition, technology, and the environment.



### National Agricultural Library

The National Agricultural Library serves the United States, and USDA, by affording access to agricultural information from around the world. Our exhibit features the DigiTop system - a digital desktop library, accessible to the desks of USDA employees. DigiTop offers access to vital resources, including: databases, journals, newspapers, statistical sources and reference materials.

### Animal and Plant Health Inspection Service

APHIS safeguards U.S. agricultural and natural resources against threats visible and invisible. APHIS monitors and promotes animal health, plant health, wildlife management, and animal welfare. APHIS employees in the United States and in foreign countries use cutting-edge technology, science, and risk-mitigation measures to improve agricultural productivity and competitiveness and protect public health.

### Food Safety and Inspection Service

*Talk with staff members and pick up information on USDA and FSIS biosecurity efforts.* FSIS protects consumers by ensuring that meat, poultry, and egg products are safe, wholesome, and accurately labeled. Over nearly a century of protecting the Nation's food supply, FSIS has developed the infrastructure needed to confront new biosecurity challenges. FSIS has more than 7,600 inspectors and veterinarians in meat, poultry, and egg product plants every day, and at ports-of-entry to prevent, detect, and respond to food safety emergencies.

### National Food Safety and Toxicology Center, Michigan State University

*Introducing the Online Professional Master of Science in Food Safety Program.* The National Food Safety and Toxicology Center at MSU will address the need to improve the food safety educational process through the development of an online Master of Science in Food Program. The goal will be to provide an educational opportunity for future leaders in industry and government who are assuming or desiring additional food safety responsibilities. An important addition to the faculty will be internationally recognized guest contributors, made possible by the advent of online programming. For more information contact Dr. Ed Mather at (517) 432-3100 or e-mail [mather@cvm.msu.edu](mailto:mather@cvm.msu.edu).

### Food and Nutrition Service

FNS increases food security and reduces hunger in partnership with cooperating organizations by providing children and low-income people access to food, a healthful diet, and nutrition education in a manner that supports American agriculture, and inspires public confidence. The 15 food assistance programs FNS administers serve 1 in 6 Americans, and represent our Nation's commitment to the principle that no one should fear hunger or experience want.

# Acknowledgments

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### Office of the Chief Economist

- Keith Collins, Chief Economist, Chair of the Steering Committee
- Gerald A. Bange, Chairperson, World Agricultural Outlook Board, OCE, Chair of the Program Committee

### Agricultural Marketing Service

- A.J. Yates, Administrator

### Animal and Plant Health Inspection Service

- Bobby R. Acord, Administrator

### Cooperative State Research, Education and Extension Service

- Colien Hefferan, Administrator

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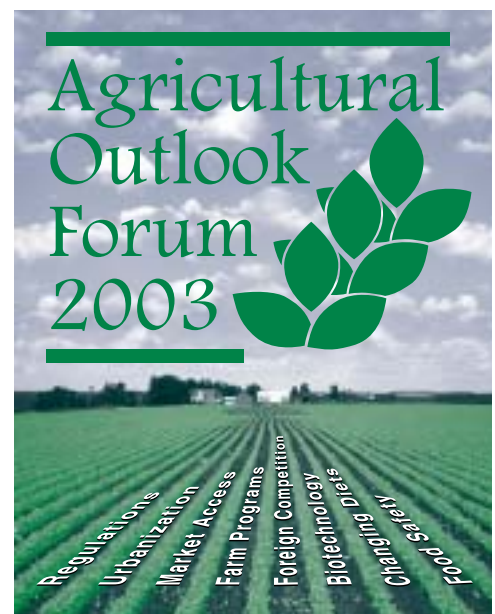
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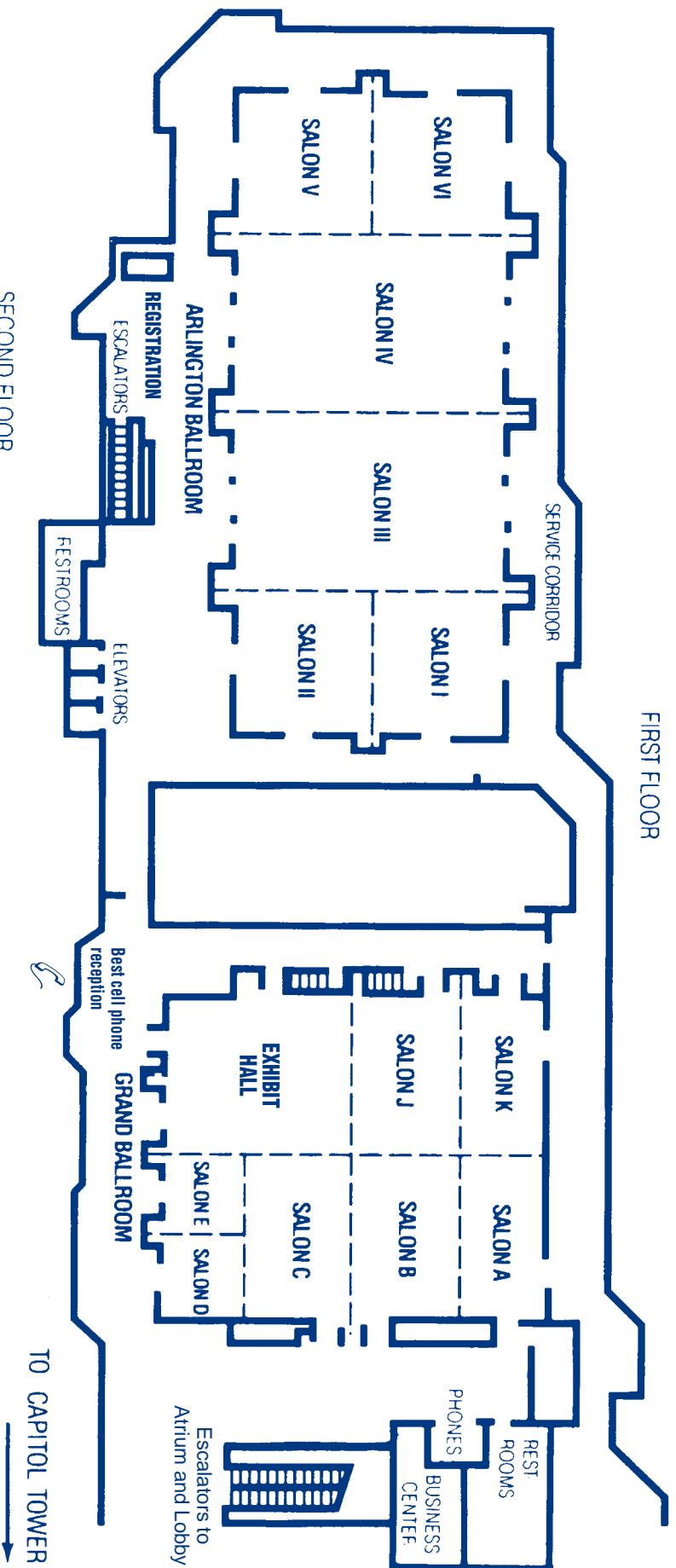
## ■ USDA's Latest Long-Term Projections

*USDA Agricultural Baseline Projections to 2012* is available on the Internet at: <http://www.ers.usda.gov/briefing/baseline>

To order a printed copy, call 1-800-999-6779 or write to ERS-NASS, 5285 Port Royal Road, Springfield, VA 22161. Request item WAOB-2003-1.



# CRYSTAL GATEWAY Marriott



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- Refreshments will be served in the Grand Ballroom hallway as well as the Arlington Ballroom Hallway.
- Please be considerate of others. Turn off cell phone and pager ringers in meeting rooms. Make cell phone calls in the hallway in front of the Grand Ballroom exhibit area, rather than outside rooms where sessions are in progress.

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