
Agricultural Outlook Forum 2004



PROGRAM

Program Preview, see page 3
Exhibits, see page 9

Arlington, Virginia
Feb. 19-20, 2004

United States
Department of Agriculture



Ensuring a
Healthy Food
Supply



General Information

WELCOME TO THE FORUM

The U.S. Department of Agriculture welcomes you to Agricultural Outlook Forum 2004. 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.

Welcome to Agricultural Experts from Africa

Please extend a warm welcome to agricultural marketing officials from Africa who are here to learn more about disseminating agricultural price and marketing statistics. *Please see page 10 for more information.*

Parking

Parking is 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.

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.

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.

Exhibit Hall

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

Seventeen 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 level.

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.

Video Webcast Opening plenary sessions both days will be webcast at www.usda.gov, starting 1 p.m. Eastern time.

Program Preview



WEDNESDAY, FEBRUARY 18, 2004

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



THURSDAY, FEBRUARY 19, 2004



Focus on Food and Health

7:00 a.m. - 5:30 p.m. Registration Pre-registered Guests: *Arlington Ballroom Salon II*; On-site registration: *Arlington Ballroom*

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

8:30 a.m.



Opening Plenary, Arlington Ballroom

Welcome, Deputy Secretary of Agriculture James R. Moseley

2004, Agricultural, Trade and Policy Prospects, USDA Chief Economist Keith Collins and Under Secretary J.B. Penn

Keynote Address, Secretary of Agriculture Ann M. Veneman

Distinguished Speaker, James R. Cantalupo, Chief Executive Officer, McDonald's Corporation



Webcast at www.usda.gov

10:15 a.m.

Refreshment Break

10:45 a.m.

Responding to the Consumer's Quest for a Healthier Lifestyle, Part 1
Arlington Ballroom, Salon III

Farm Income and Farm Finance Outlook
Arlington Ballroom, Salon V

The Importance of Trade for Agriculture
Arlington Ballroom, Salon IV

Implementing New Regulations To Control Biological Agents and Toxins under the Bioterrorism Act of 2002
Arlington Ballroom, Salon VI

New Crop and Livestock Insurance Programs
Grand Ballroom, Salon C

12:30 p.m.

Networking Luncheon *Arlington Ballroom, Salons I and II and Grand Ballroom, Salons J and K*

12:30 p.m. - 6:45 p.m.

Exhibit Hall Open *Grand Ballroom, Salons F, G and H*

1:00 p.m.

The 2004 Food Price Outlook *Lee Room, Lobby Level*

1:45 p.m.

Responding to the Consumer's Quest for a Healthier Lifestyle, Part 2
Arlington Ballroom, Salon III

A First Look at the 2002 Census of Agriculture
Grand Ballroom, Salon C

The Biosafety Protocol and International Trade
Arlington Ballroom, Salon V

Implications for Business of Securing the Food Transportation System
Arlington Ballroom, Salon VI

New Regulations for Confined Animal Feeding Operations
Arlington Ballroom, Salon IV

3:30 p.m. - 3:45 p.m.

Refreshment Break

3:45 p.m.

What's Driving Growth in Organic Foods?
Arlington Ballroom, Salon III

Connecting Agricultural Innovation and Rural Prosperity
Grand Ballroom, Salon C

World Agricultural Resources, Technology and Productivity
Arlington Ballroom, Salon V

Promise and Pitfalls of Plant-Made Pharmaceutical and Industrial Compounds
Arlington Ballroom, Salon VI

Changes in the Meatpacking Industry Following the Discovery of BSE
Arlington Ballroom, Salon IV

5:30 p.m. - 6:45 p.m.

Cash Bar Reception *Arlington Ballroom Foyer and Exhibit Hall Foyer*

6:45 p.m.

Forum Dinner, Franz Fischler, Member, European Commission for Agriculture, Rural Development and Fisheries
Agricultural Policies and Their Reform: Lessons from Europe



FRIDAY, FEBRUARY 20, 2004

7:00 a.m. - 2:00 p.m. Registration *Arlington Ballroom Foyer*

7:15 a.m. - 2:15 p.m. Exhibit Hall Open *Grand Ballroom, Salons F, G and H*

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

8:15 a.m.



Plenary: Promoting Healthy and Nutritious Diets *Arlington Ballroom, Salons IV, V and VI*



Webcast at www.usda.gov

10:00 a.m.

Refreshment Break

10:30 a.m.

Outlook for Grains and Oilseeds
Arlington Ballroom, Salon IV

Outlook for Sugar and Sweeteners: Economics, Science and a Healthy Diet
Arlington Ballroom, Salon V

Cotton and Fibers Outlook: Focus on China
Arlington Ballroom, Salon VI

This Land Is Your Land: Will the U.S. Embrace the Landcare Movement?
Grand Ballroom, Salon B

Outlook for Milk and Dairy Products
Grand Ballroom, Salon C

12:15 p.m.

Cash Bar Reception *Exhibit Hall Foyer*

12:45 p.m. - 2:00 p.m.

Grains, Oilseeds and Livestock Luncheon
Arlington Ballroom, Salons I, II and III

Sugar and Sweeteners Luncheon
Arlington Ballroom, Salon V

Cotton and Fibers Luncheon
Arlington Ballroom, Salon VI



Fruit and Vegetables Luncheon
Grand Ballroom, Salons J and K

2:15 p.m.

Livestock and Poultry Outlook
Arlington Ballroom, Salon IV

Innovative Cooperatives for the 21st Century
Arlington Ballroom, Salons V & VI

Trading Environmental Credits
Grand Ballroom, Salon C

Contracting in the Fruit and Vegetables Sector
Grand Ballroom, Salons J & K

Renewable Energy Opportunities for American Farmers
Grand Ballroom, Salon B

4:00 p.m.

Adjourn



Forum Program

Wednesday, February 18-
Thursday, February 19

WEDNESDAY, FEBRUARY 18, 2004

5:00 p.m. – 8:30 p.m.

Registration

Arlington Ballroom Foyer

THURSDAY, FEBRUARY 19, 2004

7:00 a.m. – 5:30 p.m.

Registration

Pre-registered guests: Arlington Ballroom, Salon II

Onsite registration: Arlington Foyer
Registration Desk

7:15 a.m. – 8:15 a.m.

Continental Breakfast

Arlington Ballroom Foyer

8:30 a.m. – 10:15 a.m.

OPENING PLENARY

Arlington Ballroom

8:30 a.m. Welcome

James Moseley, Deputy Secretary of Agriculture

8:40 a.m. 2004 Agricultural, Trade and Policy Prospects

2004 Agricultural Prospects

Keith Collins, Chief Economist, USDA

U.S. Trade and Agricultural Policy

J.B. Penn, Under Secretary of Farm and Foreign Agricultural Services, USDA

9:15 a.m. Keynote

Keynote Address

Ann M. Veneman, Secretary of Agriculture

The Customer Is Boss

James R. Cantalupo, Chairman and Chief Executive Officer, McDonald's Corporation

10:15 a.m.

Refreshment Break

Arlington Ballroom Foyer

10:45 a.m. – 12:30 p.m.
CONCURRENT SESSIONS

RESPONDING TO THE CONSUMER'S QUEST FOR A HEALTHIER LIFESTYLE, PART 1

Arlington Ballroom, Salon III

Moderator: Eric Hentges, Director, Center for Nutrition Policy and Promotion, USDA

The Costs of Unhealthy Eating and Proposals To Influence Behavior

Eric Finklestein, Health Economist, Division of Health Economics, Research Triangle Institute

WIN the Rockies: A Community-Based, Health-Centered Approach to Obesity Intervention

Sylvia Moore, Professor/Director, Medical Education & Public Health, Assistant Dean, University of Wyoming College of Health Sciences

Healthy Eating Under Age Two

Susan Pac, Manager of Regulatory Affairs, Gerber Products Company

Products, Policies and Programs: An Integrated Consumer Approach

Donna Shields, Senior Manager, Media Relations, Coca-Cola Corporation

FARM INCOME AND FARM FINANCE OUTLOOK

Arlington Ballroom, Salon V

Moderator: Gregory D. Hanson, Professor, Department of Agricultural Economics and Rural Sociology, Penn State University

Globalization Forces Rural America To Blaze a New Trail

Jason Henderson, Economist, Center for the Study of Rural America

Rural Labor Markets: Changing Prospects

Robert Gibbs, Regional Economist, Economic Research Service, USDA

Federal Tax Policy and Farmers: A Current Perspective and Outlook

Ron Durst, Agricultural Economist, Economic Research Service, USDA

Forecast of Income and Wealth for the Farm Sector, Households and the Farms They Operate

Jim Johnson and Mitch Morehart, Agricultural Economists, Economic Research Service, USDA

THE IMPORTANCE OF TRADE TO AGRICULTURE

Arlington Ballroom, Salon IV

Moderator: A. Ellen Terpstra, Administrator, Foreign Agricultural Service, USDA

Importance of Trade to American Agriculture

Charles Kruse, President, Missouri Farm Bureau

Export Views of a Specialty Crop Industry

Christian Schlect, President, Northwest Horticultural Council

Mutual Importance of U.S.-EU Trade to the U.S. and EU Agricultural Sectors

Tassos Haniotis, European Commission, Deputy Head of Cabinet, Cabinet of Franz Fischler

Global Markets and the Future of American Agriculture

Neilson C. Conklin, Director, Market and Trade Economics Division, Economic Research Service, USDA

IMPLEMENTING NEW REGULATIONS TO CONTROL BIOLOGICAL AGENTS AND TOXINS UNDER THE BIOTERRORISM ACT OF 2002

Arlington Ballroom, Salon VI

Moderator: Jeremy Stump, Director, Homeland Security Staff, USDA

Regulatory Overview Panel – Implementing Requirements

What's Required to Possess, Use or Transfer Select Agents

Shannon R. Hamm, Assistant Deputy Administrator, Policy and Program Development Division, Animal and Plant Health Inspection Service, USDA

Regulatory Impacts for Plant Agents and Toxins

Michael Firko, Assistant Director, Plant Health Programs, Animal and Plant Health Inspection Service, USDA

Agricultural Bioterrorism Protection Act of 2002; Possession, Use and Transfer of Biological Agents and Toxins

Lee Ann Thomas, Director, Animals, Organisms and Vectors, and Select Agents, Animal and Plant Health Inspection Service, USDA

Coordinating with APHIS on Overlap Agents and Pathogens

Ted Jones, Acting Director, Select Agent Program, Centers for Disease Control and Prevention

Implications and Interactions with Government, Scientific, and Academic Community

The Role of the Diagnostic Laboratory Network for Select Agents

Gary Cunningham, Associate Administrator, Cooperative State Research, Education, and Extension Service, USDA

Impacts on Federal Laboratories of the Government Select Agent Program

Michael Ruff, Director, Homeland Security, Agricultural Research Service, USDA



Forum Program

Thursday, February 19

Impacts of the Select Agent Rule on Veterinary Laboratories

Randall L. Levings, Director, National Veterinary Services Laboratories, Animal and Plant Health Inspection Service, USDA

How the Research Community Is Responding to the Select Agent Regulations

Rachael E. Levinson, Assistant Director for Life Sciences, White House Office of Science and Technology Policy

NEW CROP AND LIVESTOCK INSURANCE PROGRAMS

Grand Ballroom, Salon C

Moderator: Ross J. Davidson, Jr., Administrator, Risk Management Agency, USDA

Agricultural Index Insurance Products: Strengths and Limitations

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

Implications of Extending Crop Insurance to Livestock

Bruce A. Babcock, Professor, Department of Agricultural Economics, Iowa State University and Director, Center for Agricultural and Rural Development

■ 12:30 p.m. Exhibit Hall Opens

Grand Ballroom, Salons F, G and H

■ 12:30 p.m. Networking Luncheon

Arlington Ballroom, Salons I and II and Grand Ballroom, Salons J and K

■ 1:00 p.m. The 2004 Food Price Outlook

Lee Room, Lobby Level
Ephraim Leibtag, Economist, Economic Research Service, USDA

1:45 p.m. – 3:30 p.m. CONCURRENT SESSIONS

RESPONDING TO THE CONSUMER'S QUEST FOR A HEALTHIER LIFESTYLE, PART 2

Arlington Ballroom, Salon III

Moderator: Timothy Kramer, Acting National Program Leader for Human Nutrition, Agricultural Research Service, USDA

Nutritional Studies of Functional Foods

Joseph Spence, Director, Beltsville Human Nutrition Research Center, Agricultural Research Service, USDA

Functional Foods that Promote Health

Harold H. Schmitz, Director of Technology, M&M/Mars, Masterfoods

Functional Foods: Perspective of the Food Industry

Shirley C. Chen, Principal Nutrition Scientist, Unilever Bestfoods, Inc.

A FIRST LOOK AT THE 2002 CENSUS OF AGRICULTURE

Grand Ballroom, Salon C

Moderator: R. Ronald Bosecker, Administrator, National Agricultural Statistics Service, USDA

How To Interpret New Demographic Information in the Preliminary 2002 Census of Agriculture

Rich Allen, Deputy Administrator for Programs and Products, National Agricultural Statistics Service, USDA

A First Analysis of New Operator and Household Data from the 2002 Census of Agriculture

Jill L. Findeis, Professor of Agricultural, Environmental and Regional Economics, and Demography, Penn State University

Response: Impact on Knowledge about Farm Operators

Bob Hoppe, Agricultural Economist, Economic Research Service, USDA

THE BIOSAFETY PROTOCOL AND INTERNATIONAL TRADE

Arlington Ballroom, Salon V

Moderator: Jim Butler, Deputy Undersecretary for Farm and Foreign Agricultural Services, USDA

What Is the Biosafety Protocol and How Can It Affect Trade?

Gary C. Martin, President, North American Export Grain Association

The Current Status of Trade under the Biosafety Protocol

Mr. Blair Coomber, Director General for International Trade Policy, Agriculture Canada

The Kuala Lumpur Meeting: U.S. Positions

Philip C. Wall, Director, Office of Agriculture, Biotechnology and Textiles Trade Affairs, U.S. Department of State

IMPLICATIONS FOR BUSINESS OF SECURING THE FOOD TRANSPORTATION SYSTEM

Arlington Ballroom, Salon VI

Moderator: Barbara Robinson, Deputy Administrator, Transportation and Marketing Program, Agricultural Marketing Service, USDA
Overview of the U.S. Transportation System

New Safety and Security Guidelines for the Distribution of Meat, Poultry and Egg Products

D.W. Chen, Acting Assistant Administrator for Food Security and Emergency Preparedness, Food Safety and Inspection Service, USDA

Impact of New Regulatory Requirements

Kendell Keith, President, National Grain and Feed Association

The Implications of New Transportation Security Measures on Agricultural Logistics

Diane Eicher, Export Manager (COF), Coppersmith Inc.

NEW REGULATIONS FOR CONFINED ANIMAL FEEDING OPERATIONS

Arlington Ballroom, Salon IV

Moderator: Marc Ribaud, Agricultural Economist, Economic Research Service, USDA

EPA Implementation and Enforcement of the New Rule

George Utting, Water Permits Division, Office of Wastewater Management, Office of Water, U.S. Environmental Protection Agency

USDA's Assessment of the Costs of Managing Manure Nutrients with Land Application

Noel Gollehon, Agricultural Economist, Economic Research Service, USDA

USDA's Assessment of Costs and Implementation of a Comprehensive Nutrient Management Plan

Dan Meyer, Agricultural Economist, Natural Resources Conservation Service, USDA

The Producer's Perspective

Dave Roper, Chairperson, Environmental Committee, National Pork Producers Council

■ 3:30 p.m. Refreshment Break

Arlington Ballroom Foyer and Exhibit Hall Foyer



Forum Program

Thursday, February 19-
Friday, February 20

**3:45 – 5:30
CONCURRENT SESSIONS**

WHAT'S DRIVING GROWTH IN ORGANIC FOODS?

Arlington Ballroom, Salon III

Moderator: Barbara Robinson, Deputy Administrator, Transportation and Marketing Program, Agricultural Marketing Service, USDA

Recent Trends in Organic Production

Cathy Greene, Agricultural Economist, Economic Research Service, USDA

Current Trends in the Retail Market for Organics: A Retailer's Perspective

Mary Mulry, Senior Director of Product Development and Standards, Wild Oats Markets, Inc.

Organic Consumer Profile

Laurie Demeritt, President, The Hartman Group

Growth in Organic Foods: Producers' Perspectives

Kevin Edberg, Executive Director, Cooperative Development Services

CONNECTING AGRICULTURAL INNOVATION AND RURAL PROSPERITY

Grand Ballroom, Salon C

Moderator: Lawrence K. Yee, National Program Leader, Food Marketing Systems Innovations, Cooperative State Research, Education, and Extension Service, USDA; on leave from University of California

Growing a Farmer's Cooperative in Central Appalachia

Co-presenters: Anthony Flaccavento, Appalachian Sustainable Development and Steve Hodges, Jubilee Project, Inc.

New Traditions in Eastern Washington Benefit Farmers, the Environment and Consumers

Read Smith, Past President, National Association of Conservation Districts

The Changing Rural Setting for Agricultural Innovation and Community Prosperity

Linda Ghelfi, Agricultural Economist, Economic Research Service, USDA

WORLD AGRICULTURAL RESOURCES, TECHNOLOGY AND PRODUCTIVITY

Arlington Ballroom, Salon V

Moderator: Carol Kramer-LeBlanc, Director, Research and Exchanges Division, International Cooperation and Development, Foreign Agricultural Service, USDA

Resources, Technology and Agricultural Productivity in a Changing World

Susan Offutt, Administrator, Economic Research Service, USDA

Farmers' Choices, Land Quality and Agricultural Productivity

Keith Wiebe, Deputy Director, Resource Economics Division, Economic Research Service, USDA

New Technologies for Sustained Productivity Growth

Donald Duvick, former VP of Pioneer-HiBred International

Market Access and Information Systems

Naima Nango Dembele, Advisor, Market Information Systems, Michigan State University & U.S. Agency for International Development

PROMISE AND PITFALLS OF PLANT-MADE PHARMACEUTICALS AND INDUSTRIAL COMPOUNDS

Arlington Ballroom, Salon VI

Moderator: Neil E. Hoffman, Director, Regulatory Programs, Biotechnology Regulatory Services, Animal and Plant Health Inspection Services USDA

Moving Products into the Clinic: The Next Stage of Development for the Plant-made Pharmaceuticals Sector

Barry Holtz, CEO, Inflexion Therapeutics

U.S. Food Industry's View on the Development of Plant-made Pharmaceuticals and Industrials

Marialuisa Gallozzi, Partner, Covington & Burling

Plant-made Pharmaceutical Confinement Systems

Rachel G. Lattimore, Attorney, Arent Fox Kintner Plotkin & Kahn, PLLC

CHANGES IN THE MEATPACKING INDUSTRY FOLLOWING THE DISCOVERY OF BSE

Arlington Ballroom, Salon IV

Moderator: Donna Reifschneider, Administrator, Grain Inspection, Packers and Stockyards Administration

State of the Meatpacking Industry

Marvin L. Hayenga, Professor of Economics Emeritus, Iowa State University

FSIS Outreach Efforts To Implement BSE-Related Regulations

Rob Larew, Director, Congressional and Public Affairs, Food Safety and Inspection Service, USDA

New Regulatory Initiatives and a U.S. Animal I.D. Program: APHIS Perspective

Speaker to be announced

Likely Changes in the Structure of Meatpacking in Response to BSE

John Nalivka, President and Owner, Sterling Marketing

5:30 p.m.– 6:45 p.m. Cash Bar Reception

Arlington Foyer and Exhibit Hall Foyer

6:45 p.m. Forum Dinner

Arlington Ballroom, Salons I, II and III

Farm Policies and Their Reform: Lessons from Europe

Franz Fischler, Member of the European Commission Responsible for Agriculture, Rural Development and Fisheries

FRIDAY, FEBRUARY 20, 2004

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 a.m. – 8:15 a.m. Continental Breakfast

Arlington Foyer and Exhibit Hall Foyer

8:15 a.m. – 10:00 a.m. Plenary: Promoting Healthy and Nutritious Diets

Arlington Ballroom, Salons IV, V and VI

Moderator: Sylvia B. Rowe, President and CEO, International Food Information Council and the IFIC Foundation

USDA Initiatives To Promote Healthy Diets

Eric M. Bost, Under Secretary for Food, Nutrition, and Consumer Services, USDA

Promoting Healthy Diets from a Public Health Perspective

Marianne S. Edge, President, American Dietetic Association

PepsiCo: Capturing Growth at the Intersection

Brock Leach, Senior Vice President for New Growth Platforms and Chief Innovation Officer, PepsiCo



Forum Program

Friday, February 20

From Dinner Plate to Farm Gate: How Will New Diet Trends Affect Farming?

Victor L. Lechtenberg, Dean of Agriculture, Purdue University

■ 10:00 a.m.

Refreshment Break

Arlington Ballroom Foyer and Exhibit Hall Foyer

10:30 a.m. – 12:15 p.m.
CONCURRENT SESSIONS

OUTLOOK FOR GRAINS AND OILSEEDS

Arlington Ballroom, Salon IV

Moderator: Keith Menzie, Agricultural Economist, World Agricultural Outlook Board, Office of the Chief Economist, USDA

The Outlook for Wheat, Feedgrains and Oilseeds

William Tierney, Commodity Analyst, World Agricultural Outlook Board, Office of the Chief Economist, USDA

The Outlook for Soybean Processing: A Global Market Perspective

Albert Ambrose, Vice President for Risk Management, Oilseed Processing, CHS Inc.

What's Ahead for China as a Grain Producer and Exporter?

John Wade, Group Leader, Cotton, Oilseeds, Tobacco, and Seed Division, Foreign Agricultural Service, USDA

OUTLOOK FOR SUGAR AND SWEETENERS: ECONOMICS, SCIENCE AND A HEALTHY DIET

Arlington Ballroom, Salon V

Moderator: John Love, Sweeteners Analyst, World Agricultural Outlook Board, Office of the Chief Economist, USDA

Economic Factors Affecting U.S. Sugar Consumption

Margaret Blamberg, Executive Director, American Cane Sugar Refiners' Association

Sound Science and Prospects for Sugar Consumption

Andrew Briscoe III, President and Chief Executive Officer, The Sugar Association, Inc.

Multiple Factors Associated with Obesity

Maureen Storey, Director, Center for Food and Nutrition Policy, Virginia Tech

COTTON AND FIBERS OUTLOOK: FOCUS ON CHINA

Arlington Ballroom, Salon VI

Moderator: Craig Jagger, Chief Economist, Committee on Agriculture, U.S. House of Representatives

The USDA Outlook for 2004/05

Leslie Meyer, Agricultural Economist, Economic Research Service, USDA

Factors Affecting the China Balance Sheet for 2004/05

Hunter Colby, Managing Director of Cotton Economics, Globecot, Inc.

Meeting China's Cotton Mill Demand: A Western Merchant's Perspective

Gary W. Taylor, President and CEO, Cargill Cotton

Safeguards on Textile Imports from China: Process, Outcomes and Prospects for the Future

Jim Leonard III, Deputy Assistant Secretary for Textiles, Apparel and Consumer Goods, International Trade Administration, Department of Commerce

THIS LAND IS YOUR LAND: WILL THE U.S. EMBRACE THE LANDCARE MOVEMENT?

Grand Ballroom, Salon B

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

Landcare—Its Origins, Accomplishments, and Lessons Learned

Fran Freeman, Minister-Counselor, Agriculture, Embassy of Australia

Landcare—An Agribusiness Perspective

John Hickman, Principal Scientist, John Deere Technology Center

Landcare—A Farmer's Perspective

Bill Richards, Farmer, Richards Farms, Circleville, Ohio

Landcare—A Conservationist's Perspective

Gary Mast, President, National Association of Conservation Districts

OUTLOOK FOR MILK AND DAIRY PRODUCTS

Grand Ballroom, Salon C

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

2004 Outlook for Milk and Dairy Products

James Miller, Agricultural Economist, Economic Research Service, USDA

Issues and Challenges Facing the Federal Order System

Larry Hamm, Professor, Department of Agricultural Economics, Michigan State University

Innovating Healthful Milk-based Beverages

Clay Boatright, Vice President, Trade Marketing, Dairy Group, Dean Foods

■ 12:15 p.m. – 12:45 p.m.

Cash Bar Reception

Exhibit Hall Foyer

12:45 p.m. – 2:15 p.m.
LUNCHEONS

GRAINS, OILSEEDS AND LIVESTOCK LUNCHEON

Arlington Ballroom, Salons I, II and III

Moderator: W. Kirk Miller, General Sales Manager, USDA

Beef, Oilseeds & Grains: Brazilian Performance, Trends And Forecasts

Gustavo Marin Monaco, Livestock Consultant, FNP Consultants and Agra-Information, Brazil

SUGAR AND SWEETENERS LUNCHEON

Arlington Ballroom, Salon V

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

EU Sugar Reform and Some Wider Implications

Simon Harris, Adviser to British Sugar and Associated British Foods

COTTON AND FIBERS LUNCHEON

Arlington Ballroom, Salon VI

Moderator: James Little, Administrator, Farm Service Agency, USDA

The Compatibility of Trade Policy and U.S. Domestic Policy: The Case of Cotton

Joseph Glauber, Deputy Chief Economist, USDA



Forum Program

Friday, February 20

FRUIT AND VEGETABLES LUNCHEON

Grand Ballroom, Salons J and K
Moderator: A.J. Yates, Administrator,
Agricultural Marketing Service, USDA

Building Healthy Consumers for a Healthy Industry

Tom Stenzel, President and CEO, United Fresh Fruit & Vegetable Association

2:15 p.m. – 4:00 p.m.
CONCURRENT SESSIONS

LIVESTOCK AND POULTRY OUTLOOK

Arlington Ballroom, Salon IV
Moderator: Chuck Lambert, Deputy Under Secretary for Marketing and Regulatory Programs, USDA

2004 Outlook for Livestock and Poultry

Joel Greene, Agricultural Economist, World Agricultural Outlook Board, Office of the Chief Economist, USDA

A Total Quality Program for Branded Beef

John Stewart, President, Creekstone Farms Premium Beef

An Industry Perspective on Processing Meat Byproducts

Mike Reiser, Valley Proteins, Inc., Second Vice Chairman, National Renderers Association, Inc.

INNOVATIVE COOPERATIVES FOR THE 21ST CENTURY

Arlington Ballroom, Salons V and VI
Moderator: Thomas Dorr, Senior Advisor to the Secretary of Agriculture, USDA

Co-op Financing

Jean-Marie Peltier, President, National Council of Farmer Cooperatives

Co-ops in the Global Marketplace: The Sunkist Example

Claire Smith, Director of Public Affairs, Sunkist Growers, Inc.

Co-op Development Opportunities in Rural America

Jeannine Kenney, Vice President of Public Affairs and Member Services, National Cooperative Business Association

TRADING ENVIRONMENTAL CREDITS

Grand Ballroom, Salon C
Moderator: Bruce I. Knight, Chief, Natural Resources Conservation Service, USDA

Can Farmers Be Suppliers in a Market for Carbon Credits?

Zach Willey, Senior Economist, Climate & Air, Environmental Defense

Lessons Learned in Entergy's Trading Arrangements

Jeffrey L. Williams, Manager, Corporate Environmental Initiatives, Entergy Services, Inc.

How Farmers Can Make Trading Work for Them

Read Smith, Past President, National Association of Conservation Districts

CONTRACTING IN THE FRUIT AND VEGETABLES SECTOR

Grand Ballroom, Salons J and K
Moderator: Neilson C. Conklin, Director, Market and Trade Economics Division, Economic Research Service, USDA

Impact of Contracting in Fresh Produce

John Shelford, President, Global Berry Farms

Contracting Supplies for Food Processing

Douglas Circle, President and CEO, Sunrise Growers, Inc., Frozsun Foods Inc.

Economic and Regulatory Issues Regarding the Use of Grower Contracts

Brent Hueh, Assistant Professor, Department of Economics, Iowa State University

RENEWABLE ENERGY OPPORTUNITIES FOR AMERICAN FARMERS

Grand Ballroom, Salon B
Moderator: Roger K. Conway, Director, Office of Energy Policy and New Uses, Office of the Chief Economist, USDA

The Future of Biodiesel

Jeff Stroburg, CEO, West Central Cooperative

Generating Commercial Electricity from Animal Waste

Patrick Keily, Renewable Energy Project Manager, Office of Energy Options, We Energies

Farming Wind Energy

Lisa Daniels, Executive Director, Windustry

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!

Amber Waves
The Economics of Food, Farming, Natural Resources, and Rural America

Are you reading Amber Waves?
The magazine from USDA's Economic Research Service

Stop by the ERS exhibit and pick up a sample copy.
Subscribe during the Forum—save \$10 off the regular price and receive a free gift!

www.ers.usda.gov/amberwaves



Forum 2004 Exhibits

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.

Farm Service Agency

“America’s Farmers and Ranchers Count on the Farm Service Agency” explores how FSA programs help keep America’s food supply stable, wholesome, and affordable. Staff will be available to discuss FSA program areas and the commodities they support and to direct visitors to publications and the FSA website.

U.S. Trade Database and World Production, Supply and Distribution Database

Try out the Foreign Agricultural Service’s U.S. Trade database and the Production, Supply and Distribution (PS&D) database. The Trade database offers a customized view of U.S. agricultural trade by country, commodity and commodity group from 1989 to the present. The PS&D database is a repository of official USDA historical commodity and country Statistics dating back to 1960 as well as the 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. The forecasters use 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.

Risk Management Agency

The RMA publication “Risk Management Agency, A Compendium of Current Fact Sheets” will be highlighted. This publication is a compilation of factsheets on RMA’s varied programs and services, providing the public with a better understanding of the RMA mission. Experienced staff members will be available to answer questions and provide visitors with information on RMA’s educational and outreach programs.

RMA administers the crop insurance program, which helps farmers survive a major crop loss. 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.

Food Safety and Inspection Service

Stop by to talk with knowledgeable staff about FSIS’ role in securing the nation’s meat, poultry and egg products. 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.

Information on the Food Safety Hotline and guidelines for keeping food safe and secure will also be available.

Natural Resources Conservation Service

“Agriculture and Conservation” highlights NRCS’ partnership with private landowners and land users. More than 70 percent of the continental U.S. is privately owned land. NRCS employees provide information and technical assistance to private landowners and land users. Talk to our expert staff about this partnership and the agricultural and environmental benefits it provides and pick up publications about conservation of our natural resources.

Rural Development

Stop by “Promoting Business in Rural America” to talk with knowledgeable staff about cooperatives and RD’s business loan programs. Copies of the latest “Rural Cooperatives” magazine, “Co-ops 101” and “How to Start a Cooperative” will be available.

Food and Nutrition Service

The Food Stamp and Child Nutrition programs, Food Distribution, and other FNS programs are featured in a display depicting people using nutrition assistance program. Talk with knowledgeable staff about the FNS mission and programs, including nutrition education.

“What Marketing and Regulatory Programs Does” depicts the work and programs of the following three USDA agencies:

Agricultural Marketing Service

AMS includes six commodity programs – Cotton, Dairy, Fruit and Vegetable, Livestock and Seed, Poultry and Tobacco. AMS specialists provide standardization, grading and Market News services for those commodities; enforce such federal laws as the Perishable Agricultural Commodities Act and the Federal Seed Act; administer research and promotion programs; and purchase commodities for federal food programs. Our Science and Technology Program provides centralized scientific support to AMS programs, and the Transportation and Marketing Program works to ensure efficient transportation for our country’s agricultural goods and manages and regulates the National Organic Program.

Animal and Plant Health Inspection Service

APHIS is responsible for protecting and promoting U.S. agricultural health, administering the Animal Welfare Act, and carrying out wildlife damage management activities. APHIS helps protect America’s animal and plant resources from agricultural pests and diseases, threats to our food supply and to the U.S. economy; negotiates science-based standards with other countries; and protects America’s agricultural exports from unjustified trade restrictions.

Forum 2004 Exhibits *(continued)*

Grain Inspection, Packers and Stockyards Administration

GIPSA helps ensure a fair and competitive market system in the merchandising of grain and related products, livestock and poultry, facilitates the marketing of livestock, poultry, meat, cereals, oilseeds and related agricultural products, and promotes fair and competitive trading practices that benefit both consumers and American agriculture. GIPSA also manages the Official Standards for Grain used by sellers and buyers, and provides for the impartial application of grades and standards through a network of federal, state and private inspection agencies. GIPSA's Packers and Stockyards Programs work to ensure open and competitive markets for livestock, meat and poultry.

Cooperative State Research Education and Extension Service

Four agency-supported programs that promote healthy lives and healthy communities are highlighted. Talk with representatives and collect information about nutrition programs, sustainable agriculture programs, projects that meet the needs of small farmers and efforts that build partnerships with rural communities.

Economic Research Service

Representatives will be on hand to discuss the research and analysis done by ERS to help public and private decisionmakers conduct business or formulate policy related to agriculture, food, natural resources and rural economics. ERS is the main source of economic information and research from the U.S. Department of Agriculture.

See a hands-on demonstration of the ERS website and the depth of economic information it provides. ERS' booth will have a variety of publications available. Most publications can also be downloaded from the ERS website at www.ers.usda.gov.

National Agricultural Statistics Service

Visit the NASS exhibit and talk with knowledgeable staff about the 2002 Census of Agriculture. NASS conducts the U.S. census of agriculture every 5 years. The agricultural census is the most comprehensive source of data portraying our Nation's agriculture and is the only source of uniform data on agricultural production and operator characteristics for each county, State, and the United States.

Data collection for the 2002 Census of Agriculture began December 2002. In addition to agricultural structure data, information was collected on topics such as multiple operators on farms, computer/Internet use, production contracts/landlord shares, certified organic production commodities, acres treated with manure and detailed farm-related income.

NASS began releasing preliminary 2002 census data on February 3. Results are available on the Internet at www.usda.gov/nass. Complete tabulated census of agriculture data for the US, States and the 3,000-plus counties will be made available in Spring 2004. Call 800-727-9540 for additional information on all NASS products and services.

National Agricultural Library

NAL is the principal U.S. source for information about food, agriculture and natural resources. Talk with knowledgeable representatives about our extensive collection, including information of relevance to the extension community through the AGRICOLA database and NAL Information Centers (Alternative Farming Systems, Animal Welfare, Food and Nutrition, Rural Information, Water Quality and Technology Transfer).

Agricultural Research Service

Explore the varied activities of USDA's main in-house research agency. ARS is committed to ensuring a safe, abundant and nutritious food supply for the U.S. and the world, maintaining agricultural productivity and preserving the environment. Stop by, talk with our staff and learn more about our programs and research projects in agriculture, nutrition, technology and the environment.

Agricultural Marketing Research Center

Talk with representatives about this collaboration of university research and outreach specialists focused on collecting and interpreting information and creating new research to support value-added agricultural activities. Specific commodity and niche market opportunities, market trends and business development information can be found on the Center's Web site, www.agmrc.org.

Developing Market Information Systems in Africa

In conjunction with the Outlook Forum, USDA and the U.S. Agency for International Development are hosting experts from 10 African nations. They took part in a meeting on February 18 designed to support the establishment and improvement of market information systems on the African continent. The program provided insight into information operations in the United States, a forum for discussing successes and challenges faced by fellow Africans in implementing information systems, and education about ongoing U.S. technical assistance programs. This event builds on the outcomes of the Secretary's Ministerial Conference on Agricultural Science and Technology, held last June in Sacramento, California.

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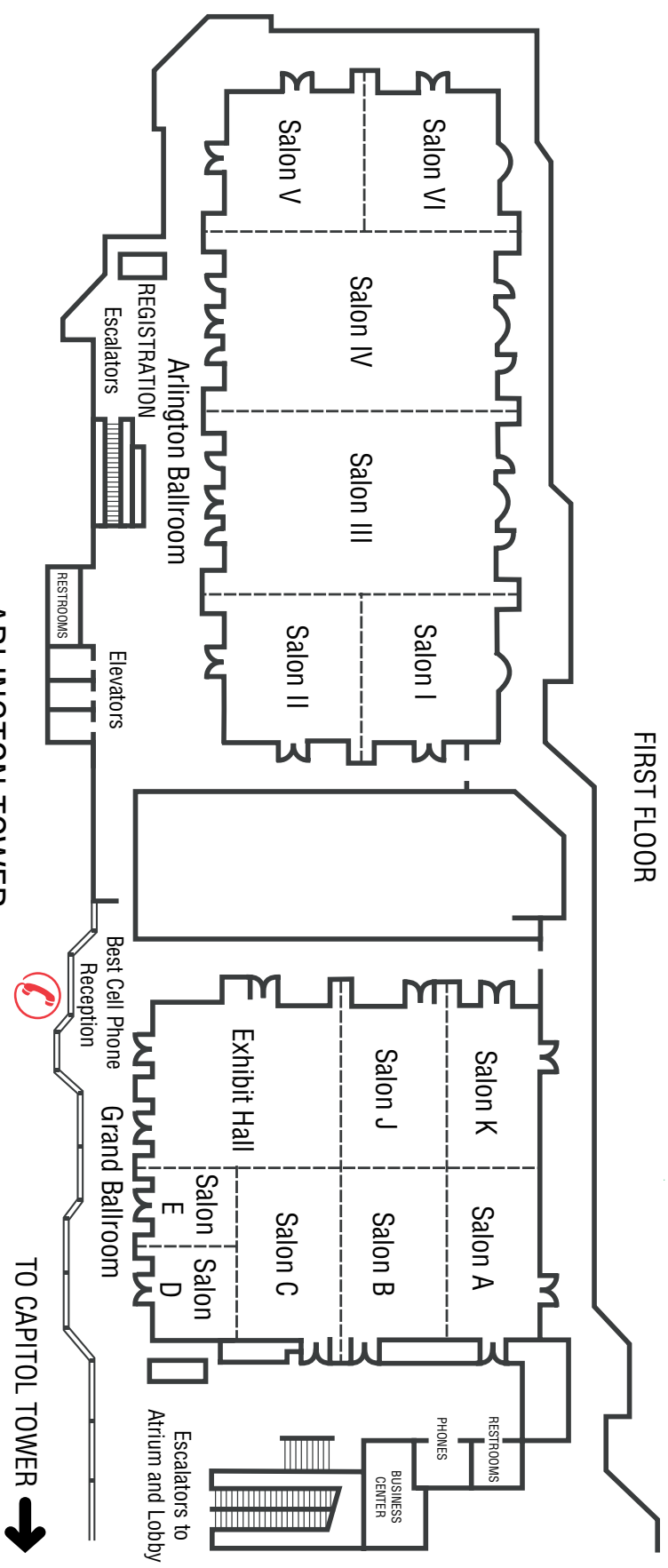
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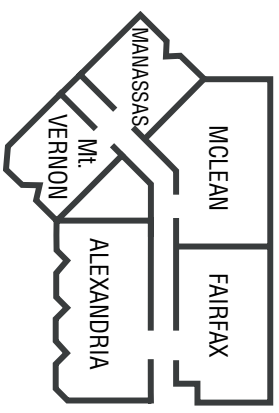


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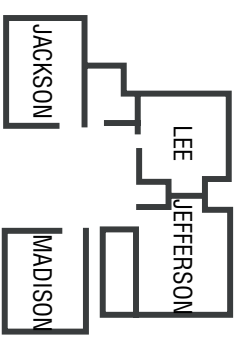


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