
Agricultural
Outlook
Forum
2005



PROGRAM

Arlington, Virginia
Feb. 24-25, 2005



***Science, Policy, Markets—
What's Ahead?***

United States Department of Agriculture



General Information

WELCOME TO THE FORUM

The U.S. Department of Agriculture welcomes you to Agricultural Outlook Forum 2005. 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.

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.

Parking

Parking is \$10.00 per day for hotel guests and Forum attendees. When you exit each day, you must show your conference badge and request this 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.

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. The Exhibit Hall is open Thursday afternoon and evening, and all day Friday. Network or visit over complimentary refreshments.

USDA agencies and partner organizations are displaying information about their programs and many are demonstrating Internet resources.

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 will be webcast at www.usda.gov/oce, starting 1:30 p.m. on February 24.

Program Preview


WEDNESDAY, FEBRUARY 23, 2005

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

THURSDAY, FEBRUARY 24, 2005

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

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

8:30 a.m. **Opening Plenary** *Arlington Ballroom*
Welcome, Dale Moore, Chief of Staff, USDA
2005 Agricultural, Trade and Policy Prospects, Chief Economist and Under Secretary for Farm and Foreign Agricultural Affairs
Opening Address, Secretary of Agriculture Mike Johanns
Keynote Address, Norman E. Borlaug, 1970 Nobel Peace Prize Laureate and Distinguished Professor for International Agriculture, Texas A&M University  Webcast at www.usda.gov/oce

10:15 a.m. Coffee Break *Arlington Ballroom Foyer*

10:45 a.m. **Plenary Panel: A 360-Degree View of Science and Agricultural Policy** *Arlington Ballroom*  Webcast at www.usda.gov/oce

12:30 p.m. Networking Luncheon *Arlington Ballroom, Salons I and II and Grand Ballroom, Salons J and K*

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

1:15 p.m. The 2005 Food Price Outlook *Grand Ballroom, Salon A*

	Science and Agriculture	Farm and Trade Policy	Renewable Energy	Farming and Rural America	Food and Consumers
1:45 p.m.	New Challenges To Safeguarding Animal and Human Health <i>Arlington Ballroom, Salon III</i>	Globalization and the Role of the WTO <i>Arlington Ballroom, Salon IV</i>	Long-term Energy Supply and Price Prospects <i>Arlington Ballroom, Salon V</i>	2005 Farm Finance Outlook <i>Arlington Ballroom, Salon VI</i>	The New Dietary Guidelines and Food Guidance System <i>Grand Ballroom, Salons J and K</i>

3:30 p.m. Refreshment Break *Arlington Ballroom Foyer and Exhibit Hall Foyer*

3:45 p.m.	Forging Harmonized International Safeguards <i>Arlington Ballroom, Salon III</i> Shaping Science and Technology Policies in Developing Countries To Facilitate Trade <i>Arlington Ballroom, Salon VI</i>	Forces Shaping the Next Farm Policy Debate <i>Arlington Ballroom, Salon IV</i>	Bio-fuel Issues—Local Economic Benefits, Co-product Supplies, and Future Technologies <i>Arlington Ballroom, Salon V</i>	New Dimensions in Risk Management <i>Grand Ballroom, Salon A</i>	Impact of Alternative Retail Outlets on Supply, Demand and Prices <i>Grand Ballroom, Salons J and K</i>
-----------	---	--	--	--	---

5:30 p.m. Cash Bar Reception *Arlington Ballroom Foyer and Exhibit Hall Foyer*

6:30 p.m. **Forum Dinner, Kathleen M. Bader, Chairman, President and Chief Executive Officer, NatureWorks LLC** *Arlington Ballroom, Salons I, II and III*

FRIDAY, FEBRUARY 25, 2005

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*

	Science and Agriculture	Farm and Trade Policy	2005 Market Outlook	Farming and Rural America	Food and Consumers
8:15 a.m.	Enhancing and Harmonizing Science-Based Food Safety Policies in the Hemisphere <i>Arlington Ballroom, Salon III</i>	Conservation Programs in the Next Farm Bill <i>Arlington Ballroom, Salon V</i>	Grains and Oilseeds Outlook <i>Arlington Ballroom, Salon IV</i> Which Avenue for Sugar Trade Reform? <i>Arlington Ballroom, Salon VI</i>	Succession Planning for an Aging Farm Population <i>Grand Ballroom, Salon B</i>	Celebrating 90 years of USDA Market News Reporting <i>Grand Ballroom, Salon C</i>

10:00 a.m. Coffee Break *Arlington Ballroom Foyer and Exhibit Hall Foyer*

10:30 a.m.		The Future of North American Market Integration <i>Arlington Ballroom, Salon III</i>	Livestock and Poultry Outlook <i>Arlington Ballroom, Salon IV</i> Cotton and Fibers Outlook <i>Arlington Ballroom, Salon V</i>	Rural Development Programs in the Next Farm Bill <i>Arlington Ballroom, Salon VI</i>	Direct and Niche Marketing Brings Local Food to Local People <i>Grand Ballroom, Salon C</i>
------------	--	--	---	--	---

12:15 p.m. Cash Bar Reception *Arlington Ballroom Foyer and Exhibit Hall Foyer*

12:45 p.m.	Grains, Oilseeds and Livestock Luncheon <i>Arlington Ballroom, I, II and III</i>	Sugar and Sweeteners Luncheon <i>Arlington Ballroom, Salon VI</i>	Cotton and Fibers Luncheon <i>Arlington Ballroom, Salon V</i>		Horticulture Luncheon <i>Grand Ballroom, Salons J and K</i>
------------	--	---	---	--	---

	Science and Agriculture	Farm and Trade Policy	2005 Market Outlook		Food and Consumers
2:15 p.m.	Responding to the Challenge of Invasive Species (until 4:30) <i>Arlington Ballroom, Salons V and VI</i>	The Biosafety Protocol and the WTO—Trade Conflict or Compatible? <i>Arlington Ballroom, Salon IV</i>	Milk and Dairy Products <i>Grand Ballroom, Salon C</i>		Preparing for Food Chain Disruptions <i>Grand Ballroom, Salon J and K</i>

4:00 p.m. Adjourn



Forum Program

Wednesday, February 23-
Thursday, February 24

WEDNESDAY, FEBRUARY 23, 2005

■ 5:00 p.m. – 8:30 p.m.

Registration

Arlington Ballroom Foyer

THURSDAY, FEBRUARY 24, 2005

■ 7:00 a.m. – 5:30 p.m.

Registration

Pre-registered guests:
Arlington Ballroom, Salon II

On-site registration:
Arlington Ballroom Foyer

■ 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

Dale W. Moore, Chief of Staff,
Office of the Secretary, USDA

■ 8:40 a.m.
**2005 Agricultural, Trade and Policy
Prospects**

2005 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

Opening Address

Secretary of Agriculture Mike Johanns

From the Green to the Gene Revolution—A 21st-Century Challenge

Norman E. Borlaug, 1970 Nobel Peace
Prize Laureate and Distinguished Professor
for International Agriculture, Texas A&M
University

■ 10:15 a.m.

Coffee Break

Arlington Ballroom Foyer

10:45 a.m. – 12:30 p.m.

PLENARY PANEL

Arlington Ballroom

A 360-DEGREE VIEW OF SCIENCE AND AGRICULTURAL POLICY

Moderator: Otto Doering, Professor of
Agricultural Economics, Purdue University;
Senior University Fellow, Natural Resources
Conservation Service, USDA

Federal Science and Technology Policy and its Role in Enhancing Agriculture

Kathie Olsen, Associate Director, White House
Office of Science and Technology Policy

The Impact of Science and Technology on Consumer Preferences

Michael J. Engler, President and CEO,
Cactus Feeders

Agriculture, Science, and Food Safety

Elsa Murano, Vice Chancellor and Dean of
Agriculture, Texas A&M University

Science and the Consumer: Working with Retail Corporations To Develop Policy

Linda Detwiler, Adjunct Professor, Virginia-
Maryland Regional College of Veterinary
Medicine, University of Maryland

■ 12:30 p.m.
Networking Luncheon

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

■ 12:30 p.m.
Exhibit Hall Opens

Grand Ballroom, Salons F, G and H

■ 1:15 p.m.
2005 Retail Food Price Outlook

Grand Ballroom, Salon A
Ephraim Leibtag, Economist, Economic
Research Service, USDA

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

NEW CHALLENGES TO SAFEGUARDING ANIMAL AND HUMAN HEALTH

Arlington, Ballroom, Salon II
Moderator: Ron DeHaven, Administrator,
Animal and Plant Health Inspection Service,
USDA

BSE and Strategies for Testing

Juergen Richt, Veterinary Medical Officer,
National Animal Disease Center, Agricultural
Research Service, USDA

Challenges in Safeguarding against Avian Influenza

Thomas J. Myers, Co-Director, National
Center for Animal Health Programs, Animal
and Plant Health Inspection Service, USDA

The Role of Risk Assessments in Managing Risk

Tsegaye Habtemariam, Director, Center for
Computational Epidemiology, Bioinformatics
and Risk Analysis, Tuskegee University

Balancing Science and Risk Management Policies

Will Hueston, Director, Center for Animal
Health and Food Safety, University of
Minnesota

GLOBALIZATION AND THE ROLE OF THE WTO

Arlington Ballroom, Salon IV
Moderator: Ann Tutwiler, Chief Executive,
International Food and Agricultural Trade
Policy Council

Why Pursue Trade Liberalization?

Kym Anderson, Lead Economist, Development
Research Group, World Bank

U.S. Perspectives on the WTO and the Doha Negotiations

Joe O'Mara, President, O'Mara & Associates

Developing Country Issues within the Doha Development Agenda

Marcos Sawaya Jank, President, Brazilian
Institute for International Trade Negotiations
(ICONE)

LONG-TERM ENERGY SUPPLY AND PRICE PROSPECTS

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

World Oil and Gas Markets: Implications for U.S. Agriculture

Kevin Lindemer, Director of Strategy and
Business Development, Irving Oil

Energy Demand and Capacity To Adjust in U.S. Agricultural Production

John Miranowski, Professor, Department of
Economics, Iowa State University

Implications of Energy Market Dynamics for the U.S. Agricultural Supply Industries

Harry Baumes, Managing Director, Global
Insight, Inc.

Energy Uncertainty—Implications for the U.S. Food Supply Chain

Thomas Sporleder, Professor of Agribusiness,
Department of Agricultural, Environmental
and Development Economics, The Ohio State
University



Forum Program

Thursday, February 24

2005 FARM FINANCE OUTLOOK

Arlington Ballroom, Salon VI

Moderator: John Blanchfield, Director, Center for Agriculture and Rural Banking, American Bankers Association

Farmers' Income and Contribution to National Economic Output in 2005

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

Changing Prospects for the Financial Status of Farms: A View from Mid-America

Gary D. Schnitkey, Department of Agricultural and Consumer Economics, University of Illinois

Rising Farm Debt: Income and Asset Value Considerations

James Ryan, Senior Economist, Economic Research Service, USDA

The Income and Wealth of Households Who Operate U.S. Farms

Mary Ahearn, Senior Economist, Economic Research Service, USDA

THE NEW DIETARY GUIDELINES AND FOOD GUIDANCE SYSTEM

Grand Ballroom, Salons J and K

Moderator: Joseph Spence, Deputy Administrator for Nutrition Food Safety and Quality, Agricultural Research Service, USDA

What Are the New Dietary Guidelines for Americans?

Eric J. Hentges, Executive Director, Center for Nutrition Policy and Promotion, USDA

Implementing Nutritional Guidance through Government Programs

Joan M.G. Lyon, Nutritionist, Center for Nutrition Policy and Promotion, USDA

Transformations in the Food Industry: Reducing Trans Fat in the Diet

Robert Reeves, President, Institute of Shortening and Edible Oils

General Mills: Committed to Whole Grain

Susan J. Crockett, Senior Director, Bell Institute of Health and Nutrition, General Mills

Promoting and Positioning Products for Good Nutrition

Anne Banville, Vice President of Domestic Promotion, USA Rice Federation

3:30 p.m. Refreshment Break

Arlington Ballroom Foyer and Exhibit Hall Foyer

3:45 p.m. – 5:30 p.m. CONCURRENT SESSIONS

FORGING HARMONIZED INTERNATIONAL SAFEGUARDS

Arlington Ballroom, Salon III

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

Role of International Standard-Setting Bodies

Lee Ann Jackson, Economic Affairs Officer, Agriculture and Commodities Division, World Trade Organization

How International Plant and Animal Standards Work

Robert Griffin, Director, Plant Epidemiology and Risk Analysis Laboratory, Center for Plant Health Science and Technology, Animal and Plant Health Inspection Service, USDA

Michael David, Co-Director, National Center for Import and Export, Animal and Plant Health Inspection Service, USDA

Harmonizing International Agreements with Respect to Integrated Agricultural Markets: BSE Case Study

David Sparling, Associate Professor, Department of Agricultural Economics and Business, University of Guelph

FORCES SHAPING THE NEXT FARM POLICY DEBATE

Arlington Ballroom, Salon IV

Moderator: Jim Wiesemeyer, Vice President of Farm and Trade Policy, Informa Economics

Key Issues for the Next Farm Bill: Is a Buyout a Possibility?

David Orden, Senior Research Fellow, Markets, Trade and Institutions Division, International Food Policy Research Institute

Budget and the Political Process

Chip Conley, Minority Staff Economist, House Committee on Agriculture

Views from the Country

Bob Young, Chief Economist, American Farm Bureau Federation

Ag Lender Perspective on the Rural Economy

Tim Ohlde, President, Elk State Bank

Exhibit Hall Highlights

Exhibits are open today from 12:15 p.m. to 6:30 p.m. • Grand Ballroom, Salons F, G and H



Visions of Agricultural Research

Explores the varied research activities of the Agricultural Research Service, USDA's main in-house research agency.



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.



Online Services for Farmers

Applying for electronic loan deficiency payments and other online services from the Farm Service Agency provides 24-hour convenience for thousands of farmers and ranchers.



FAS Online Public Web Data Resources

These e-tools from the Foreign Agricultural Service provide access to information about global supply and demand, trade trends, and market opportunities while improving market access for U.S. products.



Economic Research Service

Come to the Economic Research Service exhibit for the latest issue of *Amber Waves* magazine and a web demo of the updated Food Consumption Data System. Subscribers to *Amber Waves* will receive a prize.



National Agricultural Library and Nutrition.gov

NAL is the world's largest resource for agricultural information. Nutrition.gov is a web-based resource that points users to databases, recipes, fact sheets and more.



Forum Program

Thursday, February 24-
Friday, February 25

BIO-FUEL ISSUES—LOCAL ECONOMIC BENEFITS, CO-PRODUCT SUPPLIES AND FUTURE TECHNOLOGIES

Arlington Ballroom, Salon V

Moderator: William F. Hagy III, Deputy Administrator, Business Programs, RB-CS, Rural Development, USDA

Biofuel Production: Implications for the Grain Industry and Consumers

Hosein Shapouri, Senior Agricultural Economist, Office of Energy Policy and New Uses, Office of the Chief Economist, USDA

The Effects of Biofuel Production on the Local Economy

Douglas A. Durante, Executive Director, Clean Fuels Development Coalition

Todd Sneller, Administrator, Nebraska Ethanol Board

Issues and Opportunities Related to the Production and Marketing of Ethanol Co-products

Gerald Shurson, Professor, Department of Animal Science, University of Minnesota

New Technologies in Biofuel Production

Rodney J. Bothast, Director of Research, National Corn-To-Ethanol Research Center, Southern Illinois University

SCIENCE AND TECHNOLOGY POLICIES IN DEVELOPING COUNTRIES TO FACILITATE TRADE

Arlington Ballroom, Salon VI

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

Video: Ministerial Conference and Expo on Agricultural Science and Technology

Emerging Marketing Opportunities and Challenges from the Rise of Supermarkets: Implications for Trade and Technology

Thomas Reardon, Professor, International Development and Agribusiness, Michigan State University

Shaping Science and Technology Policies for Agricultural Productivity and Growth in Developing Countries

Joachim Von Braun, Director General, International Food Policy Research Institute

Raising Economic Growth and Trade Through Science and Technology

Felipe Manteiga, Managing Director, Markets and Sectoral Assessment, Millennium Challenge Corporation

NEW DIMENSIONS IN RISK MANAGEMENT

Grand Ballroom, Salon A

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

The Big Picture—Satellite Remote Sensing Applications in Range Land Assessment and Crop Insurance

Tim Watts, President, Watts and Associates

Kevin P. Price, Professor of Geography and Associate Director, Kansas Applied Remote Sensing Program, University of Kansas

New Non-Insurance Risk Management Tools: Decision Support for Freeze Protection Using Artificial Neural Networks

Ron McClendon, Professor, Department of Biological and Agricultural Engineering, University of Georgia

Managing Price Risk—Conventional Methods in Unconventional Times

Jerry Gulke, President, Strategic Marketing Services, Inc.

IMPACT OF ALTERNATIVE RETAIL OUTLETS ON SUPPLY, DEMAND AND PRICES

Grand Ballroom, Salons J and K

Moderator: Phil Kaufman, Senior Agricultural Economist, Economic Research Service, USDA

The U.S. Retail Food Landscape

Understanding the Consumer and the Retailer Response

Mike Sansolo, Director, Industry Relations, the Food Marketing Institute

Producer Response to Changes in the Retail Food Market

Amy Philpott, Vice President, Marketing and Industry Relations, United Fresh Fruit and Vegetable Association

Traditional Food Store Response to Changes in the Retail Food Market

Jim Hertel, Senior Vice President, Willard Bishop Consulting

The Impact of Non-traditional Retail Outlets on Food Prices and Consumer Spending

Ephraim Leibtag, Economist, Economic Research Service, USDA

■ 5:30 p.m. – 6:45 p.m.

Cash Bar Reception

Arlington Ballroom Foyer and Exhibit Hall Foyer

■ 6:30 p.m. FORUM DINNER

Arlington Ballroom, Salons I, II and III

The Promise of Technology for Farmers, Consumers and the Environment

Kathleen M. Bader, Chairman, President and Chief Executive Officer, NatureWorks LLC

FRIDAY, FEBRUARY 25, 2005

■ 7:00 a.m. – 4:00 p.m.

Registration

Arlington Ballroom Foyer

■ 7:15 a.m. – 8:15 a.m.

Continental Breakfast

Arlington Ballroom Foyer and Exhibit Hall Foyer

■ 7:15 a.m. – 2:15 p.m.

Exhibit Hall Open

Grand Ballroom, Salons F, G and H

8:15 a.m. – 10:00 a.m.

CONCURRENT SESSIONS

ENHANCING AND HARMONIZING SCIENCE-BASED FOOD SAFETY POLICIES IN THE HEMISPHERE

Arlington Ballroom, Salon III

Moderator: Linda Swacina, Executive Director, Food Safety Institute of the Americas, Food Safety and Inspection Service, USDA

Food Safety for the Americas, an Argentinean Perspective

Claudio Sabsay, Under Secretary of Agricultural Policy and Food, Secretariat of Agriculture, Livestock, Fisheries and Food, Argentina

A Central American Perspective

The Honorable Mariano Jimenez, Minister of Agriculture and Livestock, Honduras

A North American Perspective

Amada Velez Mendez, Director of Food Safety Programs, Department of Agriculture, Mexico

PAHO and Food Safety in the Americas

Genaro Garcia, Regional Food Safety Advisor, Pan American Health Organization (PAHO)

A Food Safety Perspective

Oscar Gutierrez, Executive Director, Organization of International and Regional Food Safety (OIRSA)

Enhancing Science-Based Food Safety Policies and Actions in the Americas

Kevin D. Walker, Director, Agricultural Health and Food Safety Directorate, Inter-American Institute for Cooperation on Agriculture (IICA)



Forum Program

Friday, February 25

GRAINS AND OILSEEDS OUTLOOK

Arlington Ballroom, Salon IV

Moderator: Michael Yost, Associate Administrator of Programs, Farm Service Agency, USDA

Grains and Oilseeds Outlook for 2005

Jerry Norton, Agricultural Economist, Farm Service Agency, USDA

China's Grains and Oilseeds Situation

Funing Zhong, Professor and Dean, College of Economics and Management, Nanjing Agricultural University

How Would the Spread of Soybean Rust Affect U.S. Crops?

Rick Bennett, National Program Leader-Plant Health, Agricultural Research Service, USDA

Potential Market Impacts of Soybean Rust

Stan Daberkow, Agricultural Economist, Economic Research Service, USDA

CONSERVATION PROGRAMS IN THE NEXT FARM BILL

Arlington Ballroom, Salon V

Moderator: Mark Rey, Under Secretary for Natural Resources and Environment, USDA

Getting More Conservation "Bang for the Buck" Out of Conservation Programs

Timothy D. Searchinger, Director for the Center for Conservation Incentives, Environmental Defense

Rural America, Global Economic Challenges and Conservation Policy

Tom Hebert, Partner, C&M Capitolink LLC

Maintaining Conservation Programs' Strengths in the Future

Krysta Harden, CEO, National Association of Conservation Districts

The Conservation Reserve Program: Looking to the Future

John A. Johnson, Deputy Administrator of Farm Programs, Farm Service Agency, USDA

Designing Conservation Programs to Mitigate Climate Change

Catherine Kling, Professor of Economics and Head of the Resources and Environmental Policy Division, Center for Agricultural and Rural Development, Iowa State University

WHICH AVENUE FOR SUGAR TRADE REFORM?—WTO, REGIONAL OR BILATERAL?

Arlington Ballroom, Salon VI

Moderator: Robert Curtis, Director of Economics and Policy Analysis, Foreign Agricultural Service, USDA

Sugar Trade Agreements and Global Liberalization: A U.S. Producers' Perspective

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

A Caribbean Producers' Perspective

R. Karl James, Chairman of the Sugar Association of the Caribbean

An EU Perspective

Patrick Chatenay, Member of the Executive Board and Director of Strategy and Business Development, Saint Louis Sucre (Südzucker Group)

SUCCESSION PLANNING FOR AN AGING FARM POPULATION

Grand Ballroom, Salon B

Moderator: Jane Schuchardt, National Program Leader, Cooperative State Research, Education and Extension Service, USDA

Who Will Get Grandpa's Farm?

Sharon DeVaney, Professor, Department of Consumer Sciences and Retailing, Purdue University

What We Know about the Demographics of Farm Operators

Rich Allen, Deputy Administrator, National Agricultural Statistics Service, USDA

Succession Decisions and Retirement Income of Farm Households

Ashok K. Mishra, Agricultural Economist, Economic Research Service, USDA

All in the Family: The Decision to Take Up Farming

Paul Lasley, Professor and Chair, Department of Sociology, Iowa State University

Exhibit Hall Highlights

Exhibits are open today from 7:15 a.m. to 2:15 p.m. • *Grand Ballroom, Salons F, G and H*



Risk Management at USDA

The Risk Management Agency demonstrates how technology is helping improve the crop insurance program.



USDA Partner: National Weather Service

NOAA's National Weather Service monitors and forecasts weather, water and climate variability.

Food Safety and Inspection Service

Talk with knowledgeable staff about FSIS' role as the USDA's public health regulatory agency, responsible for ensuring that the Nation's commercial supply of meat, poultry, and egg products is safe, wholesome, and correctly labeled and packaged.



Electronic Access to Soils Information

The new Web Soil Survey from the Natural Resources Conservation Service delivers complete soil survey information online.



Commodity Market Information System

A one-stop portal for agricultural commodity market information is being developed by six partner USDA agencies — AMS, ERS, FAS, FSA, NASS, and OCE.



2002 Census of Agriculture

The National Agricultural Statistics Service conducts this census, the most comprehensive source of data on U.S. agriculture, every 5 years. An abundance of information from the 2002 Census is being made available in print, CD-ROM, and on the Internet.



Forum Program

Friday, February 25

CELEBRATING 90 YEARS OF USDA MARKET NEWS REPORTING

Grand Ballroom, Salon C

Moderator: George Chartier, Public Affairs Specialist, Agricultural Marketing Service, USDA

Current Market News Services: New Market News Web Portal

John Okoniewski, Assistant Chief, Market News Branch, Fruit and Vegetable Programs, Agricultural Marketing Service, USDA

New Livestock Mandatory Reporting Data-Mart Public Database

John VanDyke, Chief, Livestock and Grain Market News, Agricultural Marketing Service, USDA

Using Market News Information in the Private Sector

Rob D. Murphy, Vice President, Informa Economics, Inc.

■ 10:00 a.m. Coffee Break

Arlington Ballroom Foyer and Exhibit Hall Foyer

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

THE FUTURE OF NORTH AMERICAN MARKET INTEGRATION

Arlington Ballroom, Salon III

Moderator: Ronald Knutson, Professor, Department of Agricultural Economics, Texas A & M University

A Canadian Perspective

Michael Keenan, Director General of Research and Analysis, Agriculture and Agri-food Canada

A Mexican Perspective

Francisco Meré Palafox, Chief Executive Officer, Trust Funds for Agricultural Development, Bank of Mexico

A U.S. Perspective

Gary Blumenthal, President, World Perspectives, Inc.

LIVESTOCK AND POULTRY OUTLOOK

Arlington Ballroom, Salon IV

Moderator: Joe Glauber, Deputy Chief Economist, Office of the Chief Economist, USDA

2005 Outlook for Livestock and Poultry

Shayle Shagam, Agricultural Economist, World Agricultural Outlook Board, USDA

USDA's National Animal Identification Program

Neil Hammerschmidt, Coordinator, National Animal Identification System, Animal and Plant Health Inspection Service, USDA

State of the Industry—An Editor's View

Steve Bjerklic, Editorial Director, Meat Processing Magazine

RURAL DEVELOPMENT PROGRAMS IN THE NEXT FARM BILL

Arlington Ballroom, Salon VI

Moderator: Gilbert Gonzalez, Acting Under Secretary for Rural Development, USDA

Population Changes in Rural America Relevant to Rural Development

Calvin Beale, Rural Demographer, Economic Research Service, USDA

Potential for Co-op Development To Assist Seniors

Elizabeth Bailey, Executive Director, Cooperative Development Foundation

Are Knowledge-Based Government Assistance Programs to Rural Businesses Correctly Targeted?

Thomas G. Giessel, President, Pawnee County Farmers Union

Rural Development Issues: A Capitol Hill Perspective

Richard Bender, Senior Legislative Assistant to Senator Tom Harkin

The Future of Rural America

Peter Thomas, Administrator, Rural Business-Cooperative Service, Rural Development, USDA

COTTON AND FIBERS OUTLOOK

Arlington Ballroom, Salon V

Moderator: Wendell Kruse, Vice President, Cargill Cotton

2005 Outlook for Cotton

James W. Johnson, Agricultural Economist, Foreign Agricultural Service, USDA

Debut of the Zhengzhou Futures Market and Its Role in World Price Discovery

Ed Jernigan, Chairman and CEO, Globecot, Inc.

India's Cotton Textile and Retail Consumption in the Post-MFA Era

David B. Collins, Assistant Executive Director and Regional Director-South Asia, Cotton Council International

A Producer's Perspective on Factors Affecting Brazil's Cotton Expansion

Christopher Ward, Cotton and Soybean Producer, Matto Grosso, Brazil

DIRECT AND NICHE MARKETING BRINGS LOCAL FOOD TO LOCAL PEOPLE

Grand Ballroom, Salon C

Moderator: Debra Tropp, Team Leader, Market Channel and Postharvest Research and Development, Agricultural Marketing Service, USDA

Impact of Local Food Marketing in the U.S. Food System

Mary Hendrickson, Extension Assistant Professor, Department of Rural Sociology, University of Missouri

Direct and Niche Marketing in Northern New Mexico

Don Bustos, President of the Board, Santa Fe Farmers Market Institute and New Mexico Coordinator, American Friends Service Committee

Shore to Store Niche Marketing Campaign in the Mid-Atlantic

Marilyn Bassford, Marketing Specialist, Maryland Department of Agriculture

Generating Farmer Direct Sales to Restaurants and Foodservice Institutions in Iowa

Robert Karp, Executive Director, Practical Farmers of Iowa

■ 12:15 p.m. – 12:45 p.m. Cash Bar Reception

Arlington Ballroom Foyer and Exhibit Hall Foyer

12:45 p.m. – 2:00 p.m. LUNCHEONS

GRAINS, OILSEEDS AND LIVESTOCK LUNCHEON

Arlington Ballroom, Salons I, II, and III

Moderator: William Tierney, Agricultural Economist, World Agricultural Outlook Board, Office of the Chief Economist, USDA

Distillers Dried Grains and Their Impact on Corn, Soymeal, and Livestock

Steve Markham, Senior Merchandiser, Commodity Specialists Company

COTTON AND FIBERS LUNCHEON

Arlington Ballroom, Salon V

Moderator: John Maguire, Senior Vice President for Washington Operations, National Cotton Council of America

The View from Texas, The World's Fifth Largest Cotton Producer

Woody Anderson, Texas Cotton Producer and Past Chairman, National Cotton Council



Forum Program

Friday, February 25

SUGAR AND SWEETENERS LUNCHEON

Arlington Ballroom, Salon VI

Moderator: John Love, Agricultural Economist, World Agricultural Outlook Board, USDA

The Role of Science in Setting Nutritional Guidelines for Sweeteners

Andrew Briscoe, President and CEO, The Sugar Association

HORTICULTURE LUNCHEON

Grand Ballroom, Salons J and K

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

The Renaissance of Regional Produce Distributors

Chris Fullerton, Manager, Tuscarora Organic Growers Cooperative, Inc.

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

THE BIOSAFETY PROTOCOL AND THE WTO—TRADE CONFLICT OR COMPATIBLE?

Arlington Ballroom, Salon IV

Moderator: Ken Roberts, Associate Administrator, Foreign Agricultural Service, USDA

The Biosafety Protocol and its Obligations

Xueman Wang, Programme Officer—Legal and Policy Affairs, Biosafety Unit, Secretariat of the Convention on Biological Diversity

The Interface Between the WTO, the Biosafety Protocol and other Multilateral Environmental Agreements

Gabrielle Marceau, Counsellor, Legal Affairs Division, World Trade Organization

Trade Implications and How Countries Can Comply with Both BSP and WTO Obligations

Richard D. White, Director, Sanitary and Phytosanitary Affairs, Office of the U.S. Trade Representative

RESPONDING TO THE CHALLENGE OF INVASIVE SPECIES

Arlington Ballroom, Salons V and VI (ends 4:30 p.m.)

Moderator: Silvia Ziller, President and Founder of the Horus Institute

The Call to Action in the United States and the Present Situation

Lori Williams, Executive Director, National Invasive Species Council

Effects Upon Pollinators and Potential Ramifications

Kimberly Winter, District of Columbia Coordinator, North American Pollinator Protection Campaign

How Is USDA Responding to the Invasive Species Challenges?

Hilda Diaz-Soltero, Senior Invasive Species Coordinator, USDA

Biological Control as a Sustainable Control Mechanism

Ernest Delfosse, Director, National Biological Control Institute, Agricultural Research Service, USDA

Response from the National Association of Conservation Districts

Bill Wilson, President Elect, National Association of Conservation Districts

Global Actions To Address Invasive Species Risk

Jeff Fisher, American Association for the Advancement of Science Scholar, Ecology and Terrestrial Conservation, U.S. Department of State

Response from Australia

Ernest Delfosse, Director, National Biological Control Institute, Agricultural Research Service, USDA

Response from Brazil

Silvia Ziller, President and Founder, Horus Institute for Environmental Conservation

Response from Canada

Karen Frange, Strategies and Initiatives Coordinator, Animal Products Directorate, Canadian Food Inspection Agency

Exhibit Hall Highlights

Exhibits are open today from 7:15 a.m. to 2:15 p.m. • Grand Ballroom, Salons F, G and H

Marketing and Regulatory Programs

Find out how three USDA marketing and regulatory agencies—Agricultural Marketing Service, Animal and Plant Health Inspection Service and Grain Inspection, Packers and Stockyards Administration—work together to ensure a continuous supply of safe, good-quality food and fiber for consumers here and abroad. Also, learn about USDA Market News' 90th Anniversary celebration.

USDA Economics, Statistics and Marketing Information System

Three USDA agencies and the Mann Library, Cornell University provide an online archive of USDA crop reports. The system also offers e-mail delivery of crop reports and daily market news reports.

Rural Development Programs

Useful publications and information on farmer-owned cooperatives and USDA financial programs that promote business, housing and utilities development in rural areas.

USDA Responds to the Invasive Species Challenge

Seven USDA agencies are responding through prevention, early detection and rapid response, control and management, research, restoration, international cooperation, information management, education and public outreach.





Forum Program

Friday, February 25

MILK AND DAIRY PRODUCTS OUTLOOK

Grand Ballroom, Salon C

Moderator: Peter Vitaliano, Vice President, Economic Policy and Market Research, National Milk Producers Federation

2005 Outlook for Milk and Dairy Products

Jim Miller, Agricultural Economist, Economic Research Service, USDA

Global Dairy Trade Issues and Policies

Donald B. Learmonth, President, Fonterra (USA) Inc.

PREPARING FOR FOOD CHAIN DISRUPTIONS

Grand Ballroom, Salon J and K

Moderator: Perfecto Santiago, Deputy Assistant Administrator, Office of Food Security and Emergency Preparedness, Food Safety and Inspection Service, USDA

How Prepared Are We? An Assessment of Current Preparedness

Mark Nelson, Vice President, Science and Regulatory Policy, Grocery Manufacturers of America

Bioterrorism and Food System Disruptions

David Franz, Chief Biological Scientist, Midwest Research Institute

Enhancing Supply Chain Visibility through RFID

Ashraf Eisa, Senior Strategy Manager, Wal-Mart Stores, Inc.

Food Chain Disruptions and Trade

C. Parr Rosson III, Professor and Extension Economist, Department of Agricultural Economics, Texas A & M University

■ 4:00 p.m. Adjourn

Exhibit Hall Highlights

Exhibits are open today from 7:15 a.m. to 2:15 p.m. • Grand Ballroom, Salons F, G and H



USDA Partner: Environmental Protection Agency

Talk with EPA staff about the Agency's federal permit regulations and guidance covering concentrated animal feeding operations (CAFOs).



Professional Master of Science in Food Safety

The College of Veterinary Medicine, Michigan State University, enables graduates from around the world to further their careers without leaving their place of employment or being confined by time restraints.



USDA Partner: Agricultural Marketing Resource Center

An electronically based informational resource in value-added agriculture at www.agmrc.org.



Food Stamp Program Pre-Screening Tool

This e-tool from the Food and Nutrition Service helps citizens to determine eligibility for Food Stamp benefits. Applications for Food Stamps must be made at a local Food Stamp Office.

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

Agricultural Outlook Forum 2005



Acknowledgments

SPONSORING AGENCIES AND OUTLOOK FORUM STEERING COMMITTEE

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

- Ken Clayton, Acting Administrator

Animal and Plant Health Inspection Service

- Ron DeHaven, Administrator

Cooperative State Research, Education and Extension Service

- Colien Hefferan, Administrator

Economic Research Service

- Susan Offutt, Administrator

Farm Service Agency

- James R. Little, Administrator

Foreign Agricultural Service

- A. Ellen Terpstra, Administrator

Grain Inspection, Packers and Stockyards Administration

- Donna Reifschneider, Administrator

Natural Resources Conservation Service

- Bruce I. Knight, Chief

Risk Management Agency

- Ross J. Davidson, Jr., Administrator

Rural Development

- Gilbert G. Gonzalez, Jr., Acting Under Secretary

PROGRAM COMMITTEE

Jaime Adams	James Miller
Rich Allan	Jerry Namken
Gerald Bange	Alan Ott
Alex Barbarika	Renne Owens
Ernest Carter	Susan Owens
Mark Denbaly	J.P. Passino
Sharon Drumm	Marianne Plaus
Marvin Duncan	Donna Roberts
Eric Edgington	Andrew Rude
Lewrene Glaser	Christopher Salisbury
Catherine Greene	Renee Schwartz
Shannon Hamm	Shayle Shagam
James Haskell	Michae Sheats
Robert Heckert	Dennis Shields
Eric Hentges	Carol Skelly
Doug Holy	James Spurling
Carol House	Thomas Stafford
Linda Hutton	David Stallings
James Johnson	Linda Swacina
Phil Kaufman	William Tierney
Doug Lawrence	Debra Tropp
Ephraim Leibtag	Dorothea Vafiadis
John Love	Trang Vo
Aileen Mannix	Marca Weinberg
Chuck Martin	Leslie Whitener
Keith Menzie	Steven Zahniser

INFORMATION COMMITTEE

Janet Allen	Ellery Gumbs-Trotman
Wayne Baggett	Bethany Jones
David Black	Ted Kupelian
Anthony Bouldin	Nancy McNiff
Raymond Bridge	Eric Parsons
Jennifer Callahan	John Rice
James Callan	James Spurling
Dan Campbell	Leah Tahiry
Savonne Caughey	Becky Unkenholz
Ruth Coy	John Webster

EXHIBITORS

Dan Campbell	Douglas LeComte
Savonne Caughey	Maria Lloyd
Hunter Colby	Pattie McNiel
Patty Gibler	Nancy McNiff
Ellery Gumbs-Trotman	Eric Parsons
Doug Holy	Paul Reich
Rufino Hurtado	Deborah Richardson
Nan Hyland	Dennis Smith
Jillien Johnson	Crystal Straughn
Pat Joyce	George Uffing
Ted Kupelian	Nadine Watkins
Art Latterner	Damonica Williams

CONFERENCE STAFF

Raymond Bridge, Coordinator
Jennifer Callahan, Coordinator
Stacey Harley, Assistant
Vanessa Brown-Harrold
Susan Bickford

PRESS OPERATIONS

Martha Evans, Coordinator
Janice Phillips
Gwendolyn Coleman
Coco Clayton

COMPUTER SUPPORT

Dan Deprey
Brian Morris
Monica Tran

CONFERENCE SERVICES

Farm Service Agency
Terry Martz, Forum Planner
Arlene Hicks
Mary Tjeerdsma

REGISTRATION SERVICES

A Meeting Place

Lisa Hurlly
Julie Beamer
Barbara Diaz
Dawn Hopkin
Jennifer Pruitt

GRAPHIC DESIGN

Chris Lozos, OC
Janet Conley, FSA
Gene Hansen Creative Services, Inc.

AUDIO-VISUAL

Marriott On-Site Services

COPIER AND FAX MACHINES

Canon, USA, Inc.

SPECIAL THANKS

Edward Akerley
Cynthia McNeil
Charles Wilbur
Mail & Reproduction Management Division:
Annette James
Ray Lawrence
Stephanie Stewart
Dwight Redd

Get Forum Speeches and Reports Online

■ Sign Up Now To Receive Speeches by E-Mail

Sign up now for this free service. Delivery will begin about March 11 and continue as additional speeches are received from presenters. Speeches will be mailed in text format without tables or illustrations.

- To subscribe, go to <http://usda.mannlib.cornell.edu/usda>
- Click on Reports by E-mail and follow signup instructions.
- When prompted for your report selection, scroll to WAOB at the bottom and select speeches from the Forum.

■ Download Forum Speeches after March 7

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

■ USDA's Latest Long-Term Projections

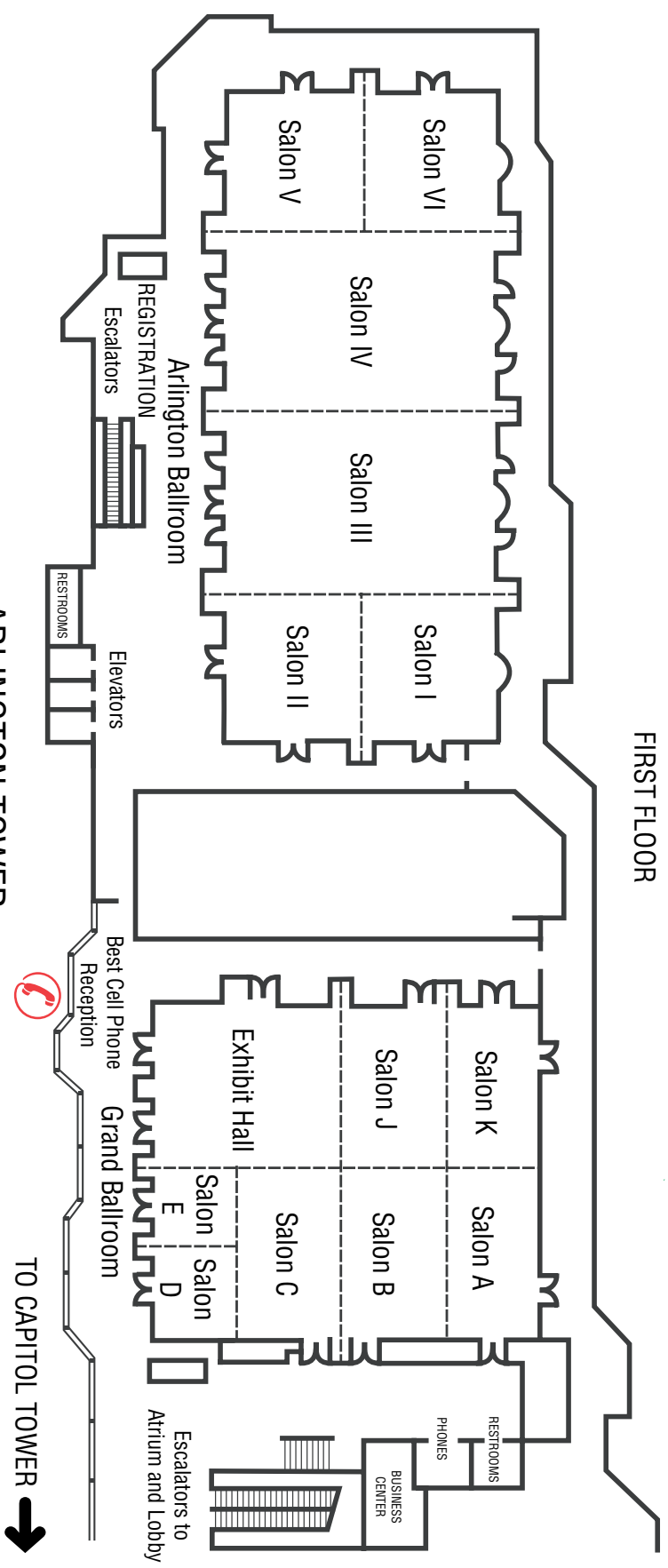
USDA Agricultural Baseline Projections to 2014 is available on the Internet at: <http://www.usda.gov/oce/waob/commodity-projections/proj.htm>

To order a printed copy, call 1-800-999-6779 or write to ERS-NASS, 5285 Port Royal Road, Springfield, VA 22161. Request item OCE-2005-1.

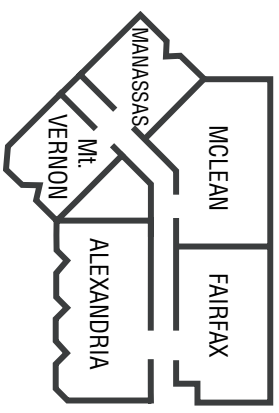


CRYSTAL GATEWAY Marriott.

FIRST FLOOR

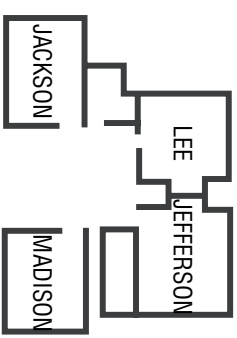


SECOND FLOOR



ARLINGTON TOWER

LOBBY LEVEL



Cell Phones

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.

1700 Jefferson Davis Highway, Arlington, VA 22202 ■ (703) 920-3230 ■ FAX (703) 271-5131
 The Outlook Forum takes place in the Arlington Ballroom and the Grand Ballroom.