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Outlook for U.S. Agricultural Trade

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Fiscal 2006 Records Continue—Exports at \$64.5 Billion, Imports at \$63.5 Billion; Trade Surplus Falls to \$1 Billion

The 2006 outlook for agricultural exports remains at a record \$64.5 billion. Since November, higher horticultural product sales and an improved beef outlook are offset by reductions in soybeans, broiler meat, and dairy products. Higher almond and tree crop prices raise horticultural products to a record \$16.3 billion. Beef exports rise as BSE-related bans are removed, but record South American supplies lower prospects for U.S. soybean exports. Canada, Mexico, Japan, the EU-25, and China remain the top five destination markets.

Compared with fiscal year 2005, the export outlook reflects a \$1.8-billion increase for horticultural products due to generally higher prices and strong foreign demand. Tree nut exports rise to a record \$3.1 billion, pork is forecast at a record \$2.3 billion, and beef exports are up as former markets reopen. Cotton exports are up with a record U.S. crop and strong demand from China. Abundant U.S. grain supplies support corn and wheat exports despite stiff competition. Soybeans and products fall \$1.4 billion reflecting strong South American competition.

Fiscal 2006 agricultural imports are raised to a record \$63.5 billion, up 10 percent from last year, continuing the accelerated pace which began in 2003. Strong demand for fresh fruits and vegetables, sugar, cocoa, coffee, beer, and wine drive imports. Steady gains for many other products are also expected. The EU-25, Canada, Mexico, Australia, and Brazil remain the top suppliers.

Table 1--U.S. agricultural trade, fiscal years 2001-2006, year ending September 30

Item	2001	2002	2003	2004	2005	Forecast	
						Fiscal 2006	
						Nov.	Feb.
---Billion dollars---							
Exports	52.7	53.3	56.0	62.4	62.4	64.5	64.5
Imports	39.0	41.0	45.7	52.7	57.7	61.5	63.5
Balance	13.7	12.3	10.3	9.7	4.7	3.0	1.0

Reflects forecasts in the February 9, 2006, *World Agricultural Supply and Demand Estimates* report.

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

Contents

[Economic Outlook](#)
[Export Products](#)
[Regional Exports](#)
[Import Products](#)
[Regional Imports](#)
[Contacts and Links](#)

Tables

[Ag. Exports](#)
[Regional Exports](#)
[Ag. Imports](#)
[Regional Imports](#)
[Reliability Tables](#)

Web Sites

[U.S. Trade Data](#)
[FAQ & Summary Data](#)
[Articles on U.S. Trade](#)

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Economic Outlook

U.S. real gross domestic product (GDP) growth is projected to continue above trend in 2006—estimated at 3.7 percent in 2005 and projected to be 3.5 percent in 2006. World GDP growth is estimated at 3.25 percent in 2005 and projected at that rate for 2006. Thus we have seen strong, continuing U.S. and world growth in spite of slow growth in Europe, modest growth in Japan, and crude oil prices which are projected to remain high into the foreseeable future. High oil and natural gas prices will add significantly to U.S. farm fuel and fertilizer costs in 2006 and beyond. High oil and industrial commodity prices have the potential to raise worldwide inflation.

Developed Economies

Long-term U.S. interest rates continue to rise in 2006 from the near-record lows of 2004 and the first half of 2005, reflecting increased world credit demand and higher short-term U.S. interest rates. The Federal Reserve Board is expected to continue to raise short-term interest rates to prevent future run-ups in inflation. While consumer price index (CPI) inflation, largely due to higher energy and industrial commodity prices, was 3.6 percent in 2005, no further increases are expected in 2006 as energy prices stabilize at or slightly below the high level of late 2005 and early 2006. The dollar is expected to depreciate modestly on average in 2006.

Canada, our leading trade partner, had GDP growth in excess of 3 percent in 2005, which is likely to continue in 2006. The boom in industrial commodity prices, strong oil and natural gas demand, and excellent investment prospects have resulted in the Canadian dollar being the strongest it has been since late 1991. Despite the expectation for a stronger Canadian dollar in 2006, Canada will continue to have a large trade surplus with the United States.

Japan's GDP growth is estimated to have been above 2 percent in 2005, and is projected to continue growing at around 2 percent in 2006. The yen is expected to continue to appreciate modestly against the dollar in 2006 due to Japan's perennial high trade surplus with the United States.

The European Union-25 (EU-25) continued to have sluggish growth of just over 1 percent in 2005, and is expected to grow at 1.5 percent in 2006. Rapid appreciation of the euro has reduced the competitiveness of European exports. The euro has strongly appreciated against the dollar and is close to its original issue rate of 1.3 dollars per euro. The dollar should appreciate modestly against the euro in 2006 as the gap narrows between U.S. and European long-term interest rates.

World Growth Prospects for 2005 Highly Dependent on China

Given lackluster European and modest Japanese growth, China's economic growth is increasingly important to world economic growth. In 2005, China continued strong growth, registering an estimated 10 percent annual rate. This continues the second straight year of around 10 percent real GDP growth. Surging Chinese growth continues to put upward pressure on demand for raw materials, supporting prices for oil, industrial materials, and some agricultural commodities.

Preliminary estimates of China's growth in total imports were comparable with that of the United States in 2005. This strong import growth makes prospects for world growth solid for 2006, despite some constraints from high commodity prices. High commodity prices, especially energy, are slowing global growth. While there are efforts by the government of China to curtail China's rapid GDP growth, there are still no signs of a slowdown in 2006. While the Chinese have instituted a more flexible exchange rate regime, the dollar is expected to depreciate only modestly against the yuan in 2006.

Developing Economies

Economic growth in developing countries is estimated to be almost 6 percent in 2005. Developing Asia continues to be the fastest growing region. Overall growth in Asia is likely to exceed 6 percent in 2005 and 2006. India's GDP grew nearly 7 percent in 2004 and 2005 and is expected to continue at this pace into 2006 despite high oil prices. Growth in South Korea and Southeast Asia will be above 5 percent. Most of the non-Chinese Asian economies should see their currencies continue to strengthen against the dollar.

The five major economies in Latin America—Argentina, Brazil, Mexico, Venezuela, and Chile—are all experiencing strong growth. The region is estimated to have grown 4.25 percent in 2005, and is projected to grow nearly 4 percent in 2006. Growth in Brazil is estimated at 3.6 percent in 2005, and is projected to continue at that rate in 2006. Widespread use of biofuels in Brazil has mitigated the impact of high oil prices. Argentina is likely to have grown about 6 percent in 2005, but is projected to slow into the high 3-percent range in 2006. Depreciation of the peso will keep Argentina a strong agricultural export competitor through 2006. As Mexico's economy is strongly tied to the United States, GDP growth in Mexico is estimated to have been nearly 4 percent in 2005 and 2006. Chile, which has followed a strong export-oriented policy, had GDP growth of around 6 percent in 2005 and is projected to continue strong growth into 2006. The major currencies of this region should appreciate relative to the dollar in real terms in 2005 and 2006, with the possible exception of Argentina.

GDP growth rates continue to be substantial for most countries of the former Soviet Union. While Africa's growth has improved markedly in recent years to an average rate exceeding 4 percent, growth varies considerably among countries there.

Exchange Rates

The agricultural trade-weighted dollar for high-valued products depreciated around 20 percent from February 2002 to April 2005, but appreciated 5 percent between April and November 2005. The dollar is expected to appreciate against the euro and yen in 2006. However, we anticipate that the dollar will weaken against developing country currencies in 2006. The net result is likely to be a modest depreciation of the trade-weighted dollar in 2006. The value of the dollar will continue to support U.S. farm and manufacturing export growth in 2006.

Export Products

The forecast for fiscal 2006 grain and feed exports is \$16.5 billion, up \$200 million from the November estimate and \$300 million above fiscal 2005. Since November, a downward revision in corn shipments is more than offset by higher export unit values for corn and wheat. The forecast for wheat volume is unchanged at 27.2 million tons, but sales increase to \$4.4 billion on higher unit values. Average export unit value for hard wheat is up, due to concerns over poorer U.S. growing conditions and continued strong foreign demand, especially from Iraq.

The fiscal 2006 corn export forecast is down 4 million tons from the November estimate due to renewed competition from China—China's export forecast was raised 3 million tons to 6 million tons—and weaker foreign demand, especially from Canada and the Middle East. However, corn export unit value is increased due to strong domestic demand for feed and ethanol production. Sorghum is reduced 200,000 tons to 4.5 million tons, the lowest in 19 years, mainly due to slow shipments to Mexico. The overall forecast for rice remains unchanged.

Compared with the previous year, the outlook for fiscal 2006 grain exports reflects continued large U.S. and global grain supplies. The 2005/06 U.S. rice and corn crops are expected to be the second largest on record. Relative to fiscal 2005, export volumes are forecast to increase for corn (up 2.4 million tons) and wheat (up 800,000 tons) despite stiff competition. Little change in export unit values is expected. Rice volume and unit values are higher in fiscal 2006 than in 2005, reflecting stronger sales to the Middle East and tighter supplies.

The fiscal 2006 export forecast for oilseeds and products is \$9.8 billion, or \$500 million lower than the November estimate and \$1.2 billion below the previous year. Soybeans are lowered 4.5 million tons from November's estimate, but an upward revision in unit value to \$240 per ton (roughly equal to fiscal 2005's average) means export value falls by only \$600 million to \$5.9 billion. In the first quarter of fiscal 2006, 40 percent of expected soybean exports had been shipped at an export unit value 8 percent higher than a year earlier. The U.S. share of the import market in Europe and China is down due to large South American shipments. However, the forecast for China's soybean imports remains at a record 27.5 million tons for 2005/06. Soybean meal and oil forecasts are adjusted slightly.

Compared with the previous year, the 2006 outlook reflects abundant U.S. soybean supplies and a record South American crop. The second largest domestic soybean crop is expected, but export volumes are forecast lower due to South American competition. Despite these conditions, U.S. soybean export unit value is forecast to remain largely unchanged from fiscal 2005 in the face of record demand from China and developments in the energy and animal feed markets. Foreign demand for vegetable oils is strong in part due to rising demand for bio-diesels.

The fiscal 2006 forecast for U.S. cotton exports is unchanged from the November estimate of 3.6 million tons valued at \$4.5 billion. Since November, the 2005/06 U.S. crop estimate is increased 560,000 bales due to favorable weather, and China's crop was increased 1.7 million bales. Compared with the previous year, the export outlook for U.S. cotton has improved, reflecting a record U.S. cotton crop and a very large increase in China's imports.

Fiscal 2006 exports of livestock, poultry, and dairy products are forecast to reach \$12.6 billion, up slightly from the November forecast and \$500 million higher than the previous year. Beef shipments are raised 75,000 tons and \$330 million from November to 287,000 tons valued at about \$1.2 billion, due to resumption of exports to several previously closed markets. However, lower expected shipments of pork and poultry meat and some reduction in dairy exports offset the gains for beef. The outlook for beef is improved as beef shipments resume in the second quarter of fiscal 2006 to Hong Kong, Taiwan, and Singapore. Exports to Japan, which resumed in December 2005, were temporarily suspended last month, but are assumed to resume in the second half of fiscal 2006. Markets which are closed to U.S. beef due to BSE import bans, most notably S. Korea, are assumed to remain closed during the forecast period. Beef offal exports are increased \$100 million due to higher unit values and stronger shipments to Egypt.

The outlook for U.S. pork export shipments in fiscal 2006 is reduced from November estimates as the pace of shipments slowed somewhat. Pork exports remain strong to Mexico and Canada due a favorable exchange rate but could be slightly lower to Japan as beef exports resume. Broiler meat exports are lowered to \$1.9 billion, due mainly to reduced shipments to countries in Eastern Europe and Central Asia because of Avian Influenza (AI) concerns. Slightly lower broiler cut prices could spur sales to price-sensitive markets. The forecast for dairy products is lowered as competitor supplies increase slightly.

The export forecast for U.S. horticultural products is increased \$400 million from the November estimate to a record \$16.3 billion, or \$1.8 billion above the previous year. A competitive U.S. dollar, strong foreign demand, and high prices for many products support this outlook. Forecast at \$3.1 billion, tree nuts are up \$700 million over 2005, and account for 40 percent of the annual increase in the entire category. Supported by higher prices, strong European demand, and reduced competition from Spain, U.S. almond exports are responsible for most of the increase in tree nut exports. Smaller 2005/06 crops and higher prices for pistachios and hazelnuts are also expected. Walnut production is up 5 percent and trade is expected to remain brisk.

The fiscal 2006 export forecast for fruit and preparations is increased to \$4.4 billion. Fresh citrus fruit exports are set at \$700 million. Florida citrus crops suffered hurricane damage this past fall lowering estimates of the production recovery from last season's hurricane-damaged crop. Fresh deciduous fruit exports are forecast to rise 14 percent to \$1.6 billion, partly due to improved apple and table grape sales. Export increases are expected for fresh berries and melons. Juice exports are forecast at \$800 million. The export forecast for vegetables and preparations remains at \$3.7 billion. Fresh vegetables (including potatoes) are forecast at \$1.7 billion. With the exception of wine, exports of other horticultural products, such as essential oils, beer, and other food preparations, are expected to increase. The wine forecast is lowered to \$700 million, or slightly below last year's level. Three-fourths of U.S. horticultural exports are shipped to Canada, Japan, the EU-25, and Mexico. Canada alone accounted for one-third of all sales in fiscal 2005.

Table 2--U.S. agricultural exports: Value and volume by commodity, 2004-2005

Commodity	October-December		Fiscal year	Forecast	
	2004	2005	2005	Fiscal 2006	
				Nov.	Feb.
---Billion dollars---					
VALUE					
Grains and feeds 1/	4.141	4.511	16.210	16.3	16.5
Wheat 2/	1.095	1.184	4.236	4.2	4.4
Rice	0.273	0.309	1.257	1.4	1.4
Coarse grains 3/	1.466	1.508	5.299	5.4	5.2
Corn	1.338	1.363	4.730	4.9	4.8
Feeds and fodders	0.675	0.751	2.706	2.7	2.8
Oilseeds and products	4.181	3.485	11.031	10.3	9.8
Soybeans	3.071	2.358	7.019	6.5	5.9
Soybean meal 4/	0.388	0.401	1.488	1.2	1.3
Soybean oil	0.128	0.092	0.351	0.4	0.3
Livestock products	1.961	2.198	7.439	7.8	8.1
Beef and veal	0.209	0.295	0.832	0.8	1.2
Pork	0.542	0.586	2.236	2.4	2.3
Beef and pork variety meats	0.180	0.201	0.687	0.7	0.8
Hides and skins, incl. furs	0.394	0.423	1.746	1.8	1.8
Poultry and products	0.751	0.856	3.011	3.0	2.9
Broiler meat 5/	0.509	0.580	2.025	2.0	1.9
Dairy products	0.446	0.386	1.685	1.7	1.6
Tobacco, unmanufactured	0.317	0.317	0.983	1.1	1.1
Cotton and linters	0.708	0.764	3.872	4.5	4.5
Seeds	0.289	0.282	0.925	0.9	0.9
Horticultural products	3.874	4.380	14.524	15.9	16.3
Fruits and preparations	0.808	0.945	4.087	4.3	4.4
Vegetables and preparations	1.410	1.579	3.468	3.7	3.7
Tree nuts and preparations	0.849	1.145	2.418	3.0	3.1
Sugar and tropical products	0.537	0.605	2.701	2.8	2.9
Major bulk products 6/	6.930	6.441	22.667	23.1	22.5
Total	17.350	17.923	62.385	64.5	64.5
---Million metric tons---					
VOLUME					
Wheat 2/	25.814	27.184	26.406	27.2	27.2
Rice	6.805	7.255	4.299	4.4	4.3
Coarse grains 3/	0.878	1.016	50.382	56.5	52.3
Corn	14.254	14.367	45.138	51.5	47.5
Feeds and fodders	13.061	13.058	10.934	11.0	11.0
Oilseeds and products	2.703	3.038	39.558	38.8	34.4
Soybeans	16.934	12.740	29.607	29.3	24.8
Soybean meal 4/	13.979	9.975	6.709	6.1	6.0
Soybean oil	1.966	1.786	0.600	0.6	0.6
Beef, pork & variety meats	0.220	0.153	1.567	1.7	1.8
Beef and veal	0.054	0.071	0.204	0.2	0.3
Pork	0.216	0.240	0.882	1.0	0.9
Beef and pork variety meats	0.136	0.128	0.481	0.5	0.5
Broiler meat 5/	0.676	0.583	2.427	2.5	2.4
Tobacco, unmanufactured	0.049	0.051	0.151	0.2	0.2
Cotton and linters	0.565	0.612	3.368	3.6	3.6
Major bulk products 6/	51.045	48.857	114.213	121.2	112.4

Total may not add due to rounding. 1/ Includes pulses and processed grain products. 2/ Excludes wheat flour.

3/ Includes corn, barley, sorghum, oats, and rye. 4/ Includes soy flours made from protein meals. 5/ Includes only

Federally inspected product. 6/ Includes wheat, rice, coarse grains, soybeans, cotton and linters, and tobacco.

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

Regional Exports

With the fiscal 2006 export total remaining unchanged from the November forecast, only minor changes were made to individual country forecasts. In general, U.S. exports will continue to expand in Canada, Mexico, and Taiwan, while lower for the EU-25, China, and the Middle East.

There is also no change in the rankings of the top 5 destination countries for U.S. agricultural exports. Canada remains the top export destination with an estimated \$11 billion going there; Mexico will take an estimated \$9.8 billion. Japan will remain the third largest export destination (taking \$7.6 billion), followed by the EU-25 (\$6.8 billion), and China (\$5.4 billion).

Exports to Canada and Mexico are forecast up \$100 million each from the November forecast supported by rising horticultural sales. Exports to Mexico for the first quarter of fiscal 2006 are ahead of the 2005 pace in most commodity categories. Exports to Canada in the first quarter of 2006 are ahead of the 2005 pace for animals and products and grains and feeds. Cotton shipments to both countries are down in the first quarter compared with last year.

Exports to Asia are unchanged from the November forecast. Rising beef and horticulture sales are offset by declines in soybeans. At \$22.6 billion, they are the second largest regional destination. The forecast for U.S. exports to China is lowered by \$100 million from the November forecast mainly due to reduced soybean shipments. Cotton shipments continue strong. Offsetting this regional loss, exports to Taiwan are forecast to rise \$100 million from November due to increasing demand for feed grains and fruits and some beef sales. The export forecast for Japan remains unchanged at \$7.6 billion.

Exports to Europe/Eurasia are down \$100 million from November to \$8.7 billion. Lower soybean sales more than offset rising horticulture exports. The forecast for the EU-25 is reduced to \$6.8 billion. The United States will continue to satisfy demand for nuts in the European market. Soybean shipments during the first quarter of fiscal 2006 are well behind the 2005 level.

Exports to the Middle East are revised down slightly from the November forecast to \$3 billion. Declining oilseed shipments account for most of the losses.

Table 3--U.S. agricultural exports: Value by region, 2004-2005

Country and region 1/	October-December		Fiscal year	Forecast	
	2004	2005	2005	Fiscal year 2006	
				Nov.	Feb.
---Billion dollars---					
Asia	6.379	6.316	22.540	22.6	22.6
East Asia	5.227	5.337	18.395	18.1	18.1
Japan	1.983	2.025	7.832	7.6	7.6
China	1.903	1.838	5.290	5.5	5.4
Hong Kong	0.258	0.244	0.882	0.8	0.8
Taiwan	0.562	0.665	2.197	2.1	2.2
South Korea	0.512	0.559	2.179	2.1	2.1
Southeast Asia	0.936	0.803	3.450	3.6	3.6
Indonesia	0.260	0.234	0.982	1.0	1.0
Philippines	0.208	0.170	0.836	0.9	0.9
Malaysia	0.103	0.110	0.382	0.4	0.4
Thailand	0.251	0.153	0.759	0.8	0.8
South Asia	0.215	0.177	0.695	0.9	0.9
Western Hemisphere	6.294	6.914	24.710	26.1	26.3
North America	4.961	5.346	19.549	20.6	20.8
Canada	2.533	2.753	10.350	10.9	11.0
Mexico	2.427	2.593	9.197	9.7	9.8
Caribbean	0.486	0.529	1.848	1.9	1.9
Central America	0.394	0.455	1.511	1.6	1.6
South America	0.453	0.584	1.802	2.0	2.0
Brazil	0.055	0.062	0.220	0.3	0.3
Colombia	0.131	0.210	0.598	0.7	0.7
Venezuela	0.079	0.137	0.351	0.3	0.3
Europe/Eurasia	2.875	2.807	8.601	8.8	8.7
European Union-25 2/	2.403	2.309	6.932	6.9	6.8
Other Europe 3/	0.110	0.132	0.468	0.5	0.5
FSU-12 4/	0.361	0.366	1.201	1.4	1.4
Russia	0.261	0.315	0.901	0.9	0.9
Middle East	0.776	0.758	2.879	3.1	3.0
Turkey	0.192	0.248	1.022	1.1	1.1
Saudi Arabia	0.100	0.108	0.345	0.4	0.4
Africa	0.698	0.815	2.668	2.8	2.8
North Africa	0.377	0.402	1.273	1.4	1.4
Egypt	0.233	0.261	0.808	0.8	0.8
Sub-Saharan Africa	0.321	0.413	1.395	1.4	1.4
Oceania	0.188	0.194	0.745	0.9	0.9
Transshipments via Canada 5/	0.140	0.120	0.242	0.2	0.2
Total	17.350	17.923	62.385	64.5	64.5

Total may not add due to rounding.

1/ Projections, other than to the 10 largest destination countries, are based primarily on trend or recent average growth analysis.

2/ The former EU-15 plus 10 new states which acceded in May 2004.

3/ Major countries include Switzerland, Norway, Iceland, Bulgaria, Romania, and former Yugoslav States.

4/ The Former 15 Republics of the Soviet Union minus the three Baltic Republics.

5/ Transshipments through Canada have not been allocated to final destinations after 1999, but are included in the total.

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

Import Products

As the U.S. economy expanded at a healthy 3.5-percent pace in 2005, U.S. agricultural imports more than kept pace. Total import value for fiscal year 2006 is projected at \$63.5 billion, up \$2 billion from \$61.5 billion in the November 2005 forecast. Except for horticulture, which is unchanged, all other import value forecasts have risen. Increased commodity prices for sugar and related products, rubber, coffee, and olive oil are driving up their import values. The dollar's exchange rate has recovered closer to its 2004 levels after depreciating in early 2005, helping Americans' purchasing power remain relatively strong.

Although projected imports of horticultural crops and products remain at \$28.2 billion, there are a number of changes in individual item forecasts. Imported fresh and frozen fruits are expected to amount to \$5.2 billion in 2006, up from \$4.9 billion in the November forecast. Fresh and frozen vegetable import estimates, however, are projected to drop from \$4.8 billion to \$4.7 billion. Nuts and preparations are also lower, by \$200 million to \$1.3 billion, and essential oils lose \$200 million. But imported malt beer is rising to \$3.5 billion from \$3.3 billion. These new forecasts are based on early indications of import growth and on historical seasonal patterns.

Seasonal horticulture imports depend on the respective commodities. Imports of fresh or frozen produce typically peak during the winter months when U.S. production is low or is not in season. Thus, imports of grapes, oranges, and temperate-climate fruits and vegetables from the Southern Hemisphere increase during the cold months of the year. Beer imports are sensitive to weather changes. At a time when large U.S. brewers have sought to counteract the slide in domestic beer sales by cutting prices, younger consumers and aging baby boomers continue to increase purchases of premium-priced beer, wine, and spirits. The same trend holds for other high-value products such as chocolate, coffee, dairy, grain products, and confections.

Imported wine and wine products, including bulk wine, bottled wine, sparkling wine, vermouth, wine must, cider, and other fermented beverages keep rising largely in response to consumer demand for increased variety. Higher world sugar prices, combined with expanded U.S. import quotas for raw sugar, raised the value and volume of sugar imports. Thus, the value of imported confections is expected to be boosted by higher sugar prices. Similarly, the import value of cocoa products such as sweet chocolate are also projected to rise. Other imports, such as natural rubber, are subject to upward price pressures from increased world demand, especially from China. Just as demand for crude oil keeps world petroleum prices high, world demand for sugar as a base for ethanol production raises prices of products that use caloric sweeteners like candy, cookies, and ice cream.

U.S. imports of cattle and calves are anticipated to increase from 1.5 million head in fiscal 2005 to about 2.2 million head in fiscal 2006. Shipments from Canada could be about 1 million head, up from 212,000 in fiscal 2005. Imports from Canada are limited to cattle under 30 months of age for placement in feedlots or immediate slaughter. The balance of cattle imports will be feeder cattle from Mexico. Total U.S. beef imports are estimated at 1.1 million tons, valued at \$3.5 billion. Both beef import value and volume are down due lower beef prices and smaller expected imports from several markets. Import value and volume for swine and pork are up from the previous forecast, bringing imports closer to fiscal 2005 levels.

Vegetable oil imports are forecast higher as the values of olive oil and palm oil rise. Palm oil volume from October to December 2005 is more than double that of a year ago. Olive oil prices are up due to reduced production in Europe. The required food content labeling of transfat starting in 2006 is partly responsible for the rise in palm oil imports.

Table 4--U.S. agricultural imports: Value and volume by commodity, 2005-2006

Commodity	Forecast				
	October-December		Fiscal year	Fiscal year 2006	
	2004	2005	2005	Nov.	Feb.
VALUE --- Billion dollars ---					
Livestock and products	2.865	3.196	11.139	11.7	11.6
Live animals, except poultry	0.444	0.792	1.577	2.2	2.2
Red meat and products	1.451	1.346	5.717	5.6	5.4
Beef and veal	0.954	0.833	3.772	3.7	3.5
Dairy products	0.658	0.734	2.609	2.7	2.7
Grains and feeds	1.184	1.281	4.429	4.7	4.8
Grain products	0.886	0.944	3.262	3.5	3.5
Oilseeds and products	0.656	0.766	2.947	3.1	3.2
Vegetable oils	0.520	0.634	2.368	2.6	2.7
Horticulture products	6.266	6.641	25.794	28.2	28.2
Fruits--fresh and frozen	0.897	1.046	4.486	4.9	5.2
Fruits--prep. or pres., and juices	0.495	0.540	2.170	2.4	2.4
Nuts and preparations	0.384	0.313	1.194	1.5	1.3
Vegetables--fresh and frozen	1.192	1.223	4.499	4.8	4.7
Vegetables--prepared or preserved	0.784	0.821	3.044	3.2	3.2
Wine	1.022	1.094	3.691	4.0	4.0
Malt beer	0.641	0.744	2.994	3.2	3.5
Essential oils	0.524	0.528	2.335	2.6	2.4
Nursery stock and cut flowers	0.325	0.332	1.380	1.5	1.5
Sugar and related products	0.529	0.715	2.306	2.4	2.8
Confections	0.285	0.301	1.158	1.2	1.3
Cocoa and products	0.594	0.712	2.633	2.7	3.1
Coffee and products	0.559	0.706	2.828	3.1	3.4
Natural rubber and gums	0.375	0.422	1.505	1.6	1.7
Spices, natural drugs, tea	0.352	0.413	1.494	1.5	1.8
Tobacco, seeds, other veg. products	0.351	0.388	1.571	1.6	1.7
Other beverages	0.251	0.307	1.073	1.2	1.3
Total agricultural imports	13.980	15.545	57.716	61.5	63.5
VOLUME --- Million metric tons ---					
Wine 1/	1.890	2.083	7.070	7.6	7.6
Malt beverages 1/	6.379	7.026	29.301	30.1	32.0
Cattle and calves 2/	0.467	0.788	1.494	2.2	2.2
Beef and veal	0.304	0.258	1.218	1.2	1.1
Dairy products 3/	0.093	0.092	0.356	0.4	0.4
Grains and products	1.224	1.305	4.636	4.7	4.8
Fruits--fresh and frozen	1.810	1.766	8.189	8.5	8.4
Fruits--prepared or preserved 4/	0.256	0.276	1.064	1.2	1.1
Nuts and preparations	0.110	0.094	0.344	0.4	0.4
Vegetables--fresh and frozen	1.267	1.353	4.958	5.1	5.3
Vegetables--prepared or preserved 4/	0.359	0.337	1.387	1.5	1.4
Vegetable oils	0.504	0.639	2.230	2.4	2.6
Sugar and related products	0.625	0.968	2.788	3.0	4.1
Cocoa and products	0.259	0.329	1.238	1.3	1.6
Coffee and products	0.326	0.315	1.318	1.3	1.4

Totals may not add due to rounding.

1/ Liquid products are measured in million hectoliters. 2/ Million heads. 3/ Cheese, casein, and butter. 4/ Excludes juices.

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

Regional Imports

The principal sources of high-value imports are the developed countries and Mexico. The top suppliers of confectionery imports are Canada, Mexico, and the EU-25. These same countries are also top suppliers of beer and wine, dairy and grain products, and vegetable oils. China is an emerging supplier of confections and horticultural products.

The \$2-billion increase in total agricultural imports from the November forecast will be earned largely by suppliers of tropical commodities, including sugar, cocoa, coffee, rubber, tea, spices, and other tropical crops. Fresh tropical fruits such as mangoes, pineapples, and melons will benefit exporters in Central and South America.

In 2005, the EU-25 surpassed Canada as the principal supplier of agricultural products to the United States. Together with Mexico, these countries account for nearly 60 percent of U.S. agricultural imports, up from 30 percent in the early 1980s. The EU-25 is projected to export \$13.6 billion to the U.S. in 2006, supplying processed foods and beverages such as wine and beer, fruit and vegetable products, cheese, olive oil, and snack foods. Canada's shipments to the U.S. is forecast at \$13 billion in 2006, consists largely of snack foods, red meat, fresh and processed vegetables, canola oil, and live farm animals.

Imports from Mexico are expected to be \$8.6 billion in 2006, led by beer, fresh and processed fruit and vegetables, snack foods, and live animals. The next largest suppliers are Australia at \$2.6 billion, followed by New Zealand, Brazil, and China at \$2 to \$2.1 billion. Australia ships beef, wine, and beer. Brazil supplies tropical fruits, juices, and coffee beans. China exports processed fruits and vegetables, juices, snack foods, fresh vegetables, tree nuts, spices, and tea.

Table 5--U.S. agricultural imports: Value by region, 2005-2006

Region and country	October-December		Fiscal year 2005	Share of total 2005	Forecast	
	2004	2005			Fiscal year 2006	
	--- Billion dollars ---			Percent	--- Billion dollars ---	
Western Hemisphere	7.017	8.075	29.843	51.7	31.8	33.0
Canada	2.954	3.405	11.817	20.5	12.1	13.0
Mexico	1.859	2.095	8.097	14.0	8.8	8.6
Central America	0.483	0.571	2.465	4.3	2.7	2.9
Costa Rica	0.188	0.223	0.880	1.5	0.9	1.1
Guatemala	0.166	0.189	0.895	1.5	1.0	1.0
Other Central America	0.130	0.158	0.690	1.2	0.8	0.8
Caribbean	0.068	0.079	0.360	0.6	0.4	0.5
South America	1.652	1.924	7.104	12.3	8.0	8.0
Brazil	0.467	0.596	1.838	3.2	2.0	2.1
Chile	0.287	0.277	1.531	2.7	1.7	1.7
Colombia	0.291	0.349	1.379	2.4	1.6	1.6
Other South America	0.608	0.702	2.357	4.1	2.6	2.6
Europe and Eurasia	3.649	3.743	13.703	23.7	14.6	14.2
European Union-25	3.520	3.618	13.236	22.9	14.0	13.6
Other Europe	0.114	0.112	0.421	0.7	0.5	0.5
Asia	1.884	2.134	8.023	13.9	8.7	9.0
East Asia	0.624	0.723	2.662	4.6	2.9	3.1
China	0.398	0.481	1.790	3.1	2.0	2.1
Other East Asia	0.226	0.242	0.873	1.5	0.9	1.0
Southeast Asia	1.026	1.157	4.377	7.6	4.7	4.8
Indonesia	0.352	0.450	1.604	2.8	1.8	1.8
Thailand	0.277	0.280	1.086	1.9	1.1	1.1
Other Southeast Asia	0.397	0.427	1.687	2.9	1.9	1.9
South Asia	0.235	0.254	0.984	1.7	1.1	1.1
India	0.211	0.232	0.902	1.6	1.0	1.0
Oceania	1.015	1.056	4.177	7.2	4.3	4.8
Australia	0.693	0.627	2.487	4.3	2.6	2.6
New Zealand	0.295	0.388	1.618	2.8	1.7	2.1
Africa	0.257	0.347	1.330	2.3	1.4	1.8
Sub-Sahara	0.230	0.314	1.205	2.1	1.2	1.6
Ivory Coast	0.087	0.141	0.565	1.0	0.6	0.8
Middle East	0.158	0.191	0.641	1.1	0.7	0.7
Turkey	0.090	0.115	0.360	0.6	0.4	0.5
World total	13.980	15.545	57.716	100.0	61.5	63.5

Totals may not add due to rounding.

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

Reliability Tables

Table 6--Reliability of U.S. February export value projections, by commodity, assorted fiscal years

Commodity	Fiscal year	Differences between Feb. projections and final data						
		Average	Average	Max below	Max above	Below	Equal	Above
		Percent	-----Billion dollars-----			Number of years		
Grains and feeds	1978-05	6.7	0.9	-1.8	2.9	13	0	15
Wheat and flour	1982-05	7.7	0.4	-0.7	1.7	14	0	10
Rice	1982-05	11.1	0.1	-0.3	0.2	14	0	10
Coarse grains	1982-05	9.9	0.5	-1.4	1.7	11	0	13
Corn	1983-05	9.9	0.5	-1.3	1.2	12	0	11
Feeds and fodders & corn gluten	1993-05	6.6	0.2	-0.4	0.4	6	0	7
Oilseeds and products	1978-05	10.9	1.0	-2.4	0.9	26	0	2
Soybeans	1982-05	6.8	0.3	-0.9	1.0	15	0	9
Soybean meal	1982-05	10.6	0.1	-0.5	0.1	17	0	7
Soybean oil	1982-05	19.4	0.1	-0.2	0.2	12	0	12
Livestock products	1978-05	7.1	0.4	-1.1	0.9	16	0	12
Beef, pork, and variety meats	1993-05	6.5	0.3	-0.6	0.7	6	0	7
Hides and skins, incl. furs	1993-05	12.4	0.2	-0.4	0.3	7	0	6
Poultry and products	1978-05	9.9	0.1	-0.3	0.3	17	0	11
Broiler meat	2003-05	11.6	0.2	-0.2	0.2	1	0	2
Dairy products	1978-05	13.8	0.1	-0.3	0.2	10	0	18
Tobacco, unmanufactured	1978-05	6.6	0.1	-0.2	0.3	11	0	17
Cotton and linters	1978-05	10.4	0.2	-0.5	0.4	15	0	13
Planting seeds	1982-05	10.4	0.1	-0.2	0.1	13	0	11
Horticultural products	1978-05	6.5	0.4	-1.3	0.5	24	0	4
Fruits and preparations	1993-05	3.9	0.1	-0.4	0.2	3	0	10
Vegetables and preparations	1993-05	3.4	0.1	-0.2	0.2	7	0	6
Tree nuts and preparations	1993-05	8.1	0.1	-0.2	0.2	9	0	4
Sugar and tropical products	1978-05	6.4	0.1	-0.3	0.3	7	0	9
Total ag. exports	1978-05	5.1	2.1	-6.1	4.3	18	0	10

Table 7--Reliability of U.S. February export volume projections, by commodity, assorted fiscal years

Commodity	Fiscal years	Differences between Feb. projections and final data						
		Average	Average	Max below	Max above	Below	Equal	Above
		Percent	-----Million metric tons-----			Number of years		
Wheat flour	1980-05	23.8	0.2	-0.3	0.5	5	5	15
Wheat	1980-05	7.1	2.2	-4.4	10.0	14	0	12
Rice	1978-05	9.1	0.3	-0.8	0.4	17	5	6
Coarse grains	1978-05	8.1	4.2	-9.7	13.1	13	0	15
Corn	1983-05	8.2	3.6	-10.7	10.2	7	2	14
Feeds, fodders, & corn gluten	1980-05	7.5	0.7	-1.8	1.8	12	1	13
Oilseeds and products	1993-05	3.1	1.1	-3.5	0.5	9	1	3
Soybeans	1978-05	6.2	1.3	-3.1	3.9	16	0	12
Soybean meal	1980-05	8.4	0.5	-1.7	0.9	19	0	7
Soybean oil	1980-05	15.3	0.1	-0.3	0.4	9	7	10
Beef, pork, & variety meats	1980-05	7.5	0.1	-0.3	0.2	8	12	6
Broiler meat	2003-05	7.1	0.2	0.0	0.3	1	0	2
Animal fats	1978-05	12.8	0.2	-0.4	0.7	11	9	7
Tobacco, unmanufactured	1978-05	9.8	0.0	0.0	0.1	0	17	4
Cotton and linters	1978-05	9.3	0.2	-0.8	0.2	14	8	6
Horticultural products	1982-05	9.3	0.4	-1.2	0.5	13	2	8
Sugar and tropical products	2000-05	5.5	0.1	0.0	0.2	0	3	2
Major bulk	1993-05	3.5	3.9	-10.1	7.9	7	1	5

Table 8--Reliability of U.S. February export value projections, by country, assorted fiscal years

Country/region	Fiscal years	Differences between Feb. projections and final data						
		Average	Average	Max below	Max above	Below	Equal	Above
		Percent	-----Billion dollars-----			Number of years		
Asia	1979-05	6.8	1.2	-2.9	3.5	14	1	12
East Asia	2005	7.6	1.4	-1.4	-1.4	1	0	0
Japan	1978-05	5.6	0.4	-1.1	0.8	15	3	10
China	1978-05	31.7	0.4	-1.2	1.1	11	3	14
Hong Kong	1988-05	7.0	0.1	-0.2	0.2	4	8	6
Taiwan	1988-05	7.2	0.1	-0.5	0.4	10	5	3
South Korea	1988-05	8.9	0.3	-0.9	0.9	6	3	9
Southeast Asia	1985-87 & 1996-05	9.5	0.2	-0.5	0.4	7	1	5
Indonesia	1999-05	11.9	0.1	-0.2	0.1	4	2	1
Philippines	1988-05	12.2	0.1	-0.2	0.1	7	9	2
Malaysia	1999-05	7.4	0.0	0.0	0.0	0	7	0
Thailand	1999-05	10.7	0.1	-0.1	0.1	4	2	1
South Asia	1978-87 & 1996-05	21.7	0.2	-0.3	0.4	6	2	12
Western Hemisphere	2005	4.5	1.1	-1.1	-1.1	1	0	0
North America	2005	4.3	0.8	-0.8	-0.8	1	0	0
Canada	1978-05	5.9	0.2	-1.5	0.4	16	4	8
Mexico	1981-05	13.6	0.4	-1.2	1.0	15	1	9
Caribbean	2002-05	8.5	0.1	-0.2	0.1	2	1	1
Central America	2002-05	3.6	0.0	-0.1	0.1	1	2	1
South America	1981-87 & 2002-05	9.7	0.2	-0.2	0.5	4	2	5
Brazil	1988-05	30.5	0.1	-0.1	0.2	6	6	6
Colombia	2002-05	9.7	0.1	-0.1	0.0	2	2	0
Venezuela	1988-05	14.1	0.1	-0.2	0.1	5	9	4
European Union-25 1/	2005	1.0	0.0	0.0	0.0	0	1	0
FSU-12 2/	2005	8.2	0.1	0.1	0.1	0	0	1
Russia	1995-05	31.5	0.2	-0.2	0.6	5	1	5
Middle East	1978-05	12.4	0.2	-0.5	0.6	12	1	15
Turkey	1999-05	16.7	0.1	-0.1	0.2	4	0	3
Saudi Arabia	1988-05	12.2	0.1	-0.1	0.1	5	8	5
Africa	1997-05	8.6	0.2	-0.5	0.4	13	2	13
North Africa	1978-05	8.9	0.1	-0.3	0.5	10	7	11
Egypt	1988-05	9.6	0.1	-0.3	0.2	5	5	8
Sub-Saharan	1978-05	15.1	0.1	-0.4	0.2	16	3	9
Oceania	1978-05	13.7	0.0	-0.3	0.1	8	17	3
World	1978-05	5.1	2.0	-6.1	4.3	17	1	10

1/ The EU is now defined as EU-25; past estimates were for EU-6, EU-9, EU-10, EU-12, and EU-15. 2/ The former Soviet Union is now defined as FSU-12 and excludes the Baltic States; past estimates were for USSR or FSU-15.

Table 9--Reliability of U.S. February import value projections, by commodity, assorted fiscal years

Commodity	Fiscal years	Differences between Feb. projections and final data						
		Avg.	Avg.	Max below	Max above	Below	Equal	Above
		Percent	-----Billion dollars-----			Number of years		
Animals and products	1986-05	5.5	0.4	-2.0	0.8	14	0	5
Live animals, except poultry	1978-05	15.5	0.2	-0.4	0.4	21	0	7
Red meats and products	1978-86 & 96-05	7.3	0.2	-1.0	0.3	10	0	9
Beef and veal	1987-95 & 2004-05	10.9	0.2	-0.7	0.6	7	0	4
Pork	1987-95 & 2004-05	11.4	0.1	-0.1	0.2	4	0	6
Dairy products	1986-05	7.6	0.1	-0.4	0.1	14	0	5
Grains and feeds	1987-05	8.1	0.2	-0.5	0.3	15	0	4
Grains	1995-05	14.7	0.1	-0.3	0.2	3	0	7
Grain products	2004-05	0.7	0.0	0.0	0.0	0	0	2
Horticulture products	1987-05	3.8	0.5	-1.7	0.8	13	0	6
Fruits, fresh and frozen	2004-05	7.4	0.3	-0.4	-0.2	2	0	0
Fruits, prep. or pres., & juices	2004-05	4.3	0.1	-0.1	0.1	1	0	1
Nuts and preparations	1987-05	12.0	0.1	-0.2	0.2	8	0	11
Vegetables, fresh and frozen	2004-05	6.6	0.3	-0.1	0.5	1	0	1
Vegetables, prep. or pres.	2004-05	2.0	0.1	-0.1	0.1	1	0	1
Wines & malt beverages	1978-03	5.4	0.1	-0.5	0.3	19	0	7
Wine	2004-05	4.0	0.1	-0.1	0.2	1	0	1
Malt beverages	2004-05	6.8	0.2	-0.3	-0.1	2	0	0
Cut flowers & nursery stock	1996-05	7.1	0.1	-0.1	0.1	4	0	6
Essential oils	2004-05	9.1	0.2	-0.2	-0.1	2	0	0
Tobacco, unmanufactured	1978-05	18.7	0.1	-0.6	0.6	18	0	9
Oilseeds and products	1978-05	11.2	0.1	-0.3	0.4	14	0	14
Vegetable oils	2005	5.6	0.1	0.1	0.1	0	0	1
Sugar and related products	1978-05	10.7	0.2	-0.5	0.5	14	0	14
Coffee and products	1980-05	12.2	0.3	-0.6	1.0	11	0	15
Cocoa and products	1980-05	9.8	0.1	-0.4	0.3	15	0	11
Rubber and gums	1978-05	19.3	0.2	-0.5	0.6	14	0	14
Tea, spices, natural drugs	2003-05	5.7	0.1	-0.2	0.0	2	0	1
Nonalcoh. bevgs, seeds, oth.	2003-05	6.5	0.1	-0.1	-0.1	2	0	0
Total agricultural imports	1978-05	4.1	1.1	-3.2	1.2	20	0	8

Table 10--Reliability of U.S. February import volume projections, by commodity, assorted fiscal years

Commodity	Fiscal year	Differences between Feb. projections and final data						
		Average	Average	Max below	Max above	Below	Equal	Above
		Percent	-----Million metric tons-----			Number of years		
Cattle & calves	2004-05	39.7	0.6	-0.2	1.0	1	0	1
Meat & preparations	1978-04	4.5	0.0	-0.1	0.1	2	5	2
Beef & veal	1987-95 & 2005	8.2	0.1	-0.1	0.2	4	4	2
Pork	1987-95 & 2005	94.1	0.5	0.0	3.9	0	6	3
Cheese & casein	1993-04	7.1	0.0	-0.1	0.1	2	9	1
Grains	1995-04	10.2	0.5	-1.5	0.6	4	1	5
Feeds & fodders	1999-04	10.1	0.1	-0.2	0.2	2	2	2
Fruits & preparations	1986-04	52.8	1.9	-0.2	4.3	6	2	8
Fruits, fresh or frozen	1996 & 2004-05	1.9	0.1	-0.2	0.1	1	1	1
Nuts & preparations	1987-05	11.1	0.0	-0.1	0.1	2	14	2
Vegetables, fresh & frozen	1993-96 & 2002-05	7.9	0.3	-0.7	0.2	7	0	2
Wine (HL)	1978-86 & 2004-05	57.7	2.7	-4.7	0.5	8	2	1
Malt beverages (HL)	2004-05	6.0	1.7	-2.3	-1.2	2	0	0
Vegetable oils & waxes	1978-86 & 2002-05	11.5	0.1	-0.3	0.3	3	4	6
Coffee & products	1984-05	9.7	0.1	-0.2	0.3	9	5	8
Cocoa beans & products	1984-05	12.6	0.1	-0.2	0.2	10	4	8

HL = Million hectoliters.

Table 11--Reliability of U.S. February import value projections, by country, assorted fiscal years

Country/region	Fiscal year	Differences between Feb. projections and final data						
		Average	Average	Max below	Max above	Below	Equal	Above
		Percent	-----Billion dollars-----		Number of years			
Western Hemisphere	2004-05	2.7	0.8	-1.2	-0.3	2	0	0
Canada	1995-05	5.4	0.4	-0.7	0.4	8	0	3
Mexico	1995-05	5.0	0.2	-0.7	0.2	6	3	2
South America	2002-05	4.5	0.2	-0.4	-0.1	4	0	0
Brazil	1995-05	20.9	0.3	-0.3	1.3	4	1	6
Colombia	1999-05	5.9	0.1	-0.1	0.1	2	3	2
Chile	1996-05	9.8	0.1	-0.2	0.3	4	5	1
Central America	1999-05	9.0	0.2	-0.3	0.4	3	2	2
Costa Rica	1999-05	5.6	0.0	0.0	0.1	0	4	3
Caribbean	2000-05	11.0	0.0	-0.1	0.1	1	4	1
European Union-25 1/	2005	18.8	0.2	-0.2	-0.2	1	0	0
FSU-12 2/	2005	117.4	0.0	0.0	0.0	0	1	0
Asia	1995-05	7.9	0.5	-0.8	0.8	5	1	5
China	1995-05	4.7	0.0	-0.2	0.0	3	8	0
Southeast Asia	1996-05	9.3	0.3	-0.7	0.4	4	0	6
Indonesia	1999-05	15.2	0.2	-0.2	0.3	3	0	4
Thailand	1999-05	10.8	0.1	-0.2	0.2	1	3	3
South Asia	1996-05	13.5	0.1	-0.2	0.2	5	2	3
Oceania	1995-05	6.7	0.2	-0.6	0.4	4	3	4
Australia	1999-05	7.6	0.1	-0.3	0.3	2	3	2
New Zealand	1999-05	7.1	0.1	-0.3	0.1	2	2	3
Africa	1995-05	9.0	0.1	-0.2	0.1	6	3	2
Ivory Coast	1999-05	20.8	0.1	-0.2	0.1	2	3	2
Middle East	1995-05	17.0	0.1	-0.2	0.2	3	3	5
Turkey	1999-05	12.9	0.0	-0.1	0.1	1	4	2
World	1995-05	3.9	1.5	-3.2	1.2	7	0	4

1/ The European Union is now defined as EU-25; past estimates were for EU-6, EU-9, EU-10, EU-12, and EU-15.

2/ The former Soviet Union is now defined as FSU-12 and excludes the Baltic States; past estimates were for USSR or FSU-15.

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Horticultural & Tropical Products: Debbie Pumpfrey/FAS, 720-8899
Fruits & Preparations
Deciduous Fresh Fruit: Heather Vethuis/FAS, 720-9792
Fresh Citrus and Juices: Debbie Pumpfrey/FAS, 720-8899
Other Fruits: Dwight Wilder/FAS, 690-2702
Vegetables & Preparations
Fresh Vegetables: Shari Kosco/FAS, 720-2083
Prepared/Preserved Vegetables: Edwin Lewis/FAS, 720-1863
Tree Nuts, Nursery/Cut Flowers: Kyle Cunningham/FAS, 720-0875
Wine: Dorsey Luchok/FAS, 720-3083
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