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Economic Research Service and Foreign Agricultural Service*

# Outlook for U.S. Agricultural Trade

## FY 2014 Exports Forecast at \$137.0 Billion; Imports at a Record \$109.5 Billion

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The next release is  
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Fiscal 2014 agricultural exports are forecast at \$137 billion, up \$2.0 billion from the August forecast but \$3.9 billion below fiscal 2013's record high. Compared with the August forecast, grain and feed exports are forecast down \$700 million, mostly due to lower unit values for wheat and certain feed products. The fiscal 2014 forecast for oilseed exports is up \$2.4 billion on higher unit values and record early-season sales of soybeans and soybean meal. Cotton exports are forecast down \$700 million this quarter as market reactions to expected changes in China's reserve policy have resulted in lower prices. Horticultural exports are unchanged at a record \$34.5 billion. The forecast for combined livestock, poultry, and dairy is raised \$700 million to a record \$31.8 billion on higher pork, dairy, and beef exports.

U.S. agricultural imports are forecast at a record \$109.5 billion, down \$3.7 billion from August, but \$5.7 billion higher than in fiscal 2013. Increases in import value are expected for most products in 2014, with the largest gains in horticultural products and sugar and tropical products. The U.S. agricultural trade surplus is expected to fall by \$9.6 billion in fiscal 2014, to \$27.5 billion. This would be the smallest surplus since 2009.

Table 1--U.S. agricultural trade, fiscal years 2008-14, year ending September 30

Item	2008	2009	2010	2011	2012	2013	Forecast fiscal year	
							2014	
							Aug.	Nov.
	<i>Billion dollars</i>							
Exports	114.9	96.3	108.5	137.4	135.8	140.9	135.0	137.0
Imports	79.3	73.4	79.0	94.5	103.4	103.8	113.0	109.5
Balance	35.6	22.9	29.6	42.9	32.4	37.1	22.0	27.5

Reflects forecasts in the November 8, 2013, *World Agricultural Supply and Demand Estimates* report.

Source: Compiled by USDA using data from U.S. Census Bureau, U.S. Department of Commerce.

Approved by the  
World Agricultural  
Outlook Board.

### *World Growth Expected To Pick Up in 2014 as Dollar Sees Mild Depreciation*

World income growth, estimated at 2.1 percent in 2013, is projected to rise to 2.8 percent in 2014. Trade growth is estimated at 2.5 percent in 2013, and is likely to double in 2014 to become a key factor in improved prospects for higher world growth. Asian GDP growth in 2013, at about 4 percent, will continue at the same pace in 2014. China and other emerging Asian economies, in pursuing policies of more consumer-oriented and sustainable growth, have become less export-growth dependent. Developing Asia is expected to see a rising share of domestic demand growth driven by consumer spending, boosted by rising wages. Housing growth will rise due to easier and sounder credit. Japan and China saw higher than expected growth in 2013, which will continue into 2014 with no acceleration. However, Korea, India, Thailand, and Malaysia can expect higher growth in 2014. Several economies in Asia are likely to slow in 2014, such as the storm-ravaged Philippines.

Higher Western Hemisphere, European, and African growth is expected in 2014, boosting world growth. In particular, North American growth is expected to move up in 2014 as the U.S. recovery accelerates in the last two quarters of 2013 and into next year. The pickup in Latin American growth in 2014 comes as higher growth prospects for Brazil, Chile, and Mexico offset slower growth prospects in Argentina. Europe is expected to continue out of its recession as growth moves from 2013's no growth to about 1.4 percent in 2014.

World trade growth is expected to accelerate in 2014 as the end of Europe's recession, coupled with a speed-up of North American, Japanese, Latin American, and African growth boost higher exports to and imports from those areas. The dollar is projected to depreciate by a weighted-average of 1.0 percent in 2014 on top of 2013's 4 percent depreciation, aiding North America's export prospects. The dollar's fall in 2013 was the result of the boost in the euro as the likelihood of either a double dip European recession or an incipient breakup of the Eurozone fell sharply. As growth in Europe and Asia becomes more balanced in 2014, their currencies are expected to appreciate with an inflow of financial assets. The continued low-valued dollar and higher growth in Europe and Latin America will further support U.S. exports. The stronger U.S. economy in 2014 will lift U.S. import demand even as U.S. exports rise, providing a boost to world growth beyond North America.

Lower U.S. energy prices and more available credit at continued low interest rates make the U.S. agricultural trade outlook promising in 2014. Expanding U.S. energy supplies from natural gas and oil fields in 2014 means that fossil fuels will be available at a discount on domestic U.S. markets, albeit a smaller discount than in 2013. Farmers will benefit from lower fuel costs in 2014, facilitating higher agricultural output and export volumes.

The main, but low probability, downside risk to higher world growth in 2014 is a BRIC (Brazil, Russia, India, and China) growth slowdown.

Table 2--Macroeconomic variables affecting U.S. agricultural exports 1/

Region/country	Share of world GDP (2012)	Income		Real exchange rate 2/		Prices	
		2013	2014	2013	2014	2013	2014
		Growth rate				Growth rate	
World (U.S. trade-weighted)	100.0	2.1	2.8	-4.7	-1.0	2.5	2.7
NAFTA	29.6	1.7	2.5	-0.1	0.2	1.6	2.1
Canada	2.3	1.6	2.8	3.2	3.5	1.0	1.6
United States	25.4	1.7	2.5	0.0	0.0	1.5	2.0
Mexico	1.9	2.0	2.9	-5.9	-1.1	3.7	3.3
Latin American and Caribbean	6.7	2.6	2.9	1.1	4.2	5.5	5.3
Argentina	0.5	4.5	1.5	9.7	7.7	10.6	11.0
Brazil	2.2	2.5	3.0	5.1	8.2	6.2	6.0
Chile	0.3	4.4	4.7	0.9	2.9	1.7	1.9
Europe	28.7	0.0	1.4	-23.5	-4.4	1.4	1.1
Asia and Oceania	28.2	4.1	4.2	7.2	0.1	2.7	3.3
China	7.5	7.6	7.7	-4.1	-3.9	2.6	2.9
Japan	8.8	1.8	1.7	22.0	3.5	0.4	1.9
South Korea	2.0	2.5	3.1	-3.0	-1.9	1.3	2.2
Indonesia	0.8	5.8	5.3	4.7	-3.5	7.0	6.8
Malaysia	0.4	4.5	4.8	0.6	-0.8	2.0	3.0
Philippines	0.3	6.3	5.5	-1.2	-0.5	2.9	3.7
Thailand	0.4	2.2	4.5	-2.8	1.2	2.2	2.7
Vietnam	0.2	4.9	5.2	-3.1	-1.7	4.9	5.3
India	2.6	4.1	4.3	-0.5	1.8	11.0	9.0
Australia	1.7	2.5	2.3	12.9	2.1	2.3	2.9
New Zealand	0.2	2.3	3.1	0.0	2.0	1.0	2.0
Middle East	3.8	2.9	3.5	1.0	0.6	6.9	7.3
Turkey	1.2	3.9	3.6	-5.8	-5.7	7.5	6.8
Africa	2.5	4.3	4.9	-1.6	-0.9	8.7	7.8

1/ Real values have a 2005 base year.

2/ Local currency per U.S. dollar. A negative growth rate indicates a depreciation of the dollar. (World is U.S.-trade-weighted estimate.)

Source: Calculations and compilation by USDA, Economic Research Service using data and forecasts from Global Insight, the IMF, and Oxford Economics.

## Export Products

Fiscal year 2014 grain and feed exports are forecast at \$28.1 billion, down \$700 million from the August estimate due to lower values for wheat and certain feed products. Coarse grain exports are forecast at \$8.3 billion, down slightly on lower unit values that more than offset sharply higher volumes. Corn volume is forecast at 36.0 million tons, up 3.5 million from August on a record crop and strong early-season sales. Feeds and fodders are down nearly \$500 million as sharply lower corn prices boost corn feeding.

Fiscal 2014 wheat exports are forecast at \$7.2 billion, a decrease of \$500 million due to both lower value and volume. Competition with Canada is projected to intensify as it tries to move its record crop. Demand from both Brazil and China has declined for U.S. wheat. Good planting conditions in the Northern Hemisphere for next year's crop, coupled with abundant global feed grain supplies, are expected to pressure prices downward. Rice exports are virtually unchanged as strong shipments to the Middle East are offset by weak shipments to Latin America.

Fiscal 2014 oilseed and product exports are forecast at \$28.8 billion, up \$2.4 billion from the August forecast following record early season-sales of soybeans and soybean meal. Improved U.S. soybean yields and larger production have boosted the outlook for exportable supplies. Unit values are also raised based on the strong demand and current price trends. The combined effect led to a \$1.5 billion increase in soybeans and a \$900 million rise in soybean meal export value. With improved global vegetable oil supplies lowering unit values, the U.S. soybean oil export forecast is lowered \$130 million.

Fiscal 2014 cotton exports are forecast at \$4.3 billion, down \$700 million from the August estimate. Unit value is lowered as the market reacts to expected changes in China's reserve policy. Export volume is forecast to remain at 2.3 million despite larger exportable supplies in competitors like India and Brazil.

Fiscal 2014 livestock, poultry, and dairy exports are raised \$700 million to a record \$31.8 billion as growth in pork, dairy, and beef offset slightly lower poultry. Pork is forecast nearly \$400 million higher to \$5.5 billion, mostly on higher prices, with strong demand expected from Mexico and some Asian markets. Dairy is raised \$300 million to \$5.9 billion on strong global prices and growing international demand, particularly from Asia. Beef is raised nearly \$100 million to \$5.0 billion, with higher prices due to strong global demand and tight other-exporter supplies. However, U.S. exports will be constrained by tight domestic supplies due to lower production. Poultry is forecast nearly \$100 million lower to \$6.4 billion on lower broiler meat prices.

The fiscal 2014 export forecast for horticultural products is unchanged at a record \$34.5 billion. Fresh fruit and vegetable exports are forecast at \$8.1 billion. Exports to Canada, Europe, and Japan are expected to continue expanding. Processed fruit and vegetable exports are forecast at \$8.0 billion. Unit values for several processed products are expected to continue rising with demand from major markets. Whole and processed tree nuts are forecast at \$7.8 billion.

Table 3—U.S. agricultural exports: Value and volume, by commodity, 2010-14

Commodity	Fiscal year				Forecast fiscal year 2014	
	2010	2011	2012	2013	Aug.	Nov.
<b>VALUE</b>	-- Billion dollars --					
Grains and feeds 1/	27.203	37.963	33.424	31.300	28.8	28.1
Wheat 2/	5.840	11.504	8.374	10.086	7.7	7.2
Rice	2.307	2.127	1.974	2.235	2.1	2.1
Coarse grains 3/	9.806	13.960	11.739	6.194	8.4	8.3
Corn	9.065	12.873	11.242	5.574	7.5	7.4
Feeds and fodders	5.586	6.411	6.922	8.246	6.6	6.1
Oilseeds and products	25.310	29.232	28.679	32.058	26.4	28.8
Soybeans	16.889	20.379	19.836	20.887	18.4	19.9
Soybean meal 4/	3.788	3.358	3.877	5.475	3.3	4.2
Soybean oil	1.348	1.734	0.830	1.148	0.7	0.5
Livestock, poultry, and dairy	21.528	27.333	29.789	31.491	31.1	31.8
Livestock products	13.547	17.344	18.462	18.868	19.0	19.4
Beef and veal 5/	3.219	4.554	4.771	5.207	4.9	5.0
Pork 5/	3.926	4.905	5.550	5.170	5.1	5.5
Beef and pork variety meats 5/	1.000	1.233	1.405	1.495	1.5	1.5
Hides, skins, and furs	2.117	2.626	2.761	3.056	3.1	3.3
Poultry and products	4.614	5.480	6.154	6.496	6.5	6.4
Broiler meat 5/ 6/	3.006	3.540	4.109	4.303	4.2	4.2
Dairy products	3.367	4.510	5.173	6.126	5.6	5.9
Tobacco, unmanufactured	1.223	1.116	1.051	1.196	1.1	1.1
Cotton	4.753	8.820	6.535	5.600	5.0	4.3
Seeds	1.230	1.370	1.468	1.598	1.4	1.4
Horticultural products 7/	22.625	25.908	28.641	31.352	34.5	34.5
Fruits and vegetables, fresh	5.868	6.642	6.998	7.330	8.1	8.1
Fruits and vegetables, processed 7/	5.608	6.310	6.831	7.146	8.0	8.0
Tree nuts, whole and processed	4.061	5.142	6.109	7.162	7.8	7.8
Sugar and tropical products 8/	4.574	5.485	6.211	6.295	6.9	6.9
Major bulk products 9/	40.818	57.906	49.509	46.199	46.7	42.9
Total	108.529	137.389	135.815	140.936	135.0	137.0
<b>VOLUME</b>	--- Million metric tons ---					
Wheat 2/	25.698	34.583	26.970	30.992	27.2	26.1
Rice	4.274	3.932	3.590	3.867	3.6	3.6
Coarse grains 3/	53.849	49.147	40.103	20.458	36.6	40.8
Corn	49.642	45.082	38.368	18.189	32.5	36.0
Feeds and fodders	18.824	18.893	17.578	18.740	18.3	17.1
Soybeans	41.588	40.398	38.487	35.020	37.7	39.5
Soybean meal 4/	10.125	8.238	8.838	10.083	8.8	9.3
Soybean oil	1.523	1.466	0.664	0.982	0.6	0.5
Beef and veal 5/	0.714	0.909	0.833	0.835	0.8	0.8
Pork 5/	1.428	1.644	1.836	1.694	1.7	1.8
Beef and pork variety meats 5/	0.711	0.822	0.753	0.752	0.7	0.7
Broiler meat 5/ 6/	2.956	3.195	3.296	3.346	3.4	3.4
Tobacco, unmanufactured	0.185	0.174	0.167	0.165	0.2	0.2
Cotton	2.680	3.011	2.710	2.860	2.3	2.3
Major bulk products 9/	128.274	131.245	112.027	93.362	107.6	112.5

Totals may not add due to rounding.

1/ Includes corn gluten feed and meal 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 chilled, frozen, and processed meats.

6/ Includes only federally inspected product. 7/ Includes juices. 8/ Includes coffee and cocoa products, tea, and spices.

9/ Includes wheat, rice, coarse grains, soybeans, cotton, and unmanufactured tobacco.

Source: Compiled by USDA using data from U.S. Census Bureau, U.S. Department of Commerce.

## Regional Exports

Agricultural exports in fiscal 2014 are at \$137.0 billion, which is \$3.9 billion below final fiscal 2013 exports of \$140.9 billion. The forecast for fiscal 2014 is raised \$2.0 billion from the August forecast, with most of the increase expected in China, Mexico, and the Philippines due to greater soybean and soybean meal demand.

### *Asia*

Exports to **China** are forecast up \$1.0 billion to \$21.5 billion. The soybean export value is expected up on strong Chinese demand coupled with higher U.S. prices. Although the total forecast is raised from the initial fiscal 2014 forecast issued in August, exports are expected down from the fiscal 2013 record of \$23.5 billion. Pork and dairy exports are expected up in fiscal 2014, but wheat shipments should fall as demand falls for imported feed wheat. Higher expected sorghum imports help offset demand for feed wheat. Cotton exports are also forecast to decline as expected changes in China's reserve policy have depressed prices. China is forecast to be the second largest U.S. market just after Canada.

**Japan** is forecast up \$100 million from the August forecast to \$13.1 billion, primarily due to greater pork unit values. The **Philippines** is raised \$200 million based on strong soybean meal sales. This new forecast is now even with the record fiscal 2013 exports of \$2.4 billion.

### *Western Hemisphere*

**Mexico** is forecast up \$600 million to \$18.6 billion. A sharply higher corn export volume will more than offset falling U.S. corn prices, as Mexican feed compounders substitute corn for sorghum. In addition, soybeans, pork, and dairy are also expected up.

Exports to **Canada** are forecast up \$100 million based on higher pork prices. Its new forecast of \$21.6 billion barely surpasses China to become the expected top U.S. market.

**Brazil** is forecast down \$100 million to \$700 million as a result of reduced demand for U.S. wheat as they shift to alternative suppliers.

### *Europe, Africa, and the Middle East*

Exports to the **EU** are forecast up \$100 million to \$10.1 billion due to strong early season soybean meal sales and higher soybean meal prices.

**Turkey** is forecast down \$100 million from the August forecast to \$1.9 billion, due to lower cotton prices, as the market reacts to expected changes in China's reserve policy.

Table 4--U.S. agricultural exports: Value by region, 2010-14

Country and region 1/	Fiscal year				Share of 2013 total	Forecast fiscal year 2014	
	2010	2011	2012	2013		Aug.	Nov.
		-- Billion dollars --			Percent	-- Billion dollars --	
Asia	45.663	58.920	60.386	60.004	42.6	57.3	58.6
East Asia	36.854	47.446	49.832	47.943	34.0	45.3	46.4
Japan	11.206	13.910	13.772	12.406	8.8	13.0	13.1
China	15.003	19.919	23.378	23.477	16.7	20.5	21.5
Hong Kong	2.460	3.224	3.377	3.629	2.6	3.3	3.3
Taiwan	3.176	3.609	3.088	3.185	2.3	3.3	3.3
South Korea	4.992	6.755	6.196	5.223	3.7	5.2	5.2
Southeast Asia	7.329	9.631	9.151	10.319	7.3	10.0	10.2
Indonesia	2.131	2.989	2.471	2.614	1.9	2.4	2.4
Philippines	1.607	2.014	2.306	2.399	1.7	2.2	2.4
Malaysia	0.788	0.938	0.876	1.022	0.7	0.9	0.9
Thailand	1.083	1.475	1.301	1.445	1.0	1.4	1.4
Vietnam	1.225	1.586	1.500	2.065	1.5	1.9	1.9
South Asia	1.479	1.843	1.403	1.741	1.2	2.0	2.0
India	0.797	0.695	0.763	0.970	0.7	1.0	1.0
Western Hemisphere	40.408	48.603	50.810	53.327	37.8	52.1	52.7
North America	30.520	36.257	38.953	39.335	27.9	39.5	40.2
Canada	16.595	18.618	20.049	21.419	15.2	21.5	21.6
Mexico	13.925	17.639	18.903	17.916	12.7	18.0	18.6
Caribbean	3.104	3.396	3.417	3.649	2.6	3.7	3.7
Dominican Republic	0.957	1.173	1.043	1.132	0.8	1.1	1.1
Central America	2.714	3.611	3.557	3.307	2.3	3.2	3.2
South America	4.070	5.339	4.884	7.035	5.0	5.7	5.6
Brazil	0.531	0.816	0.509	1.557	1.1	0.8	0.7
Colombia	0.830	1.198	0.843	1.412	1.0	1.4	1.4
Peru	0.735	0.855	0.577	0.666	0.5	0.5	0.5
Venezuela	1.074	1.229	1.527	1.602	1.1	1.5	1.5
Europe/Eurasia	10.265	12.369	11.280	13.992	9.9	12.3	12.4
European Union-28 2/	8.527	10.268	8.881	11.536	8.2	10.0	10.1
Other Europe 3/	0.362	0.453	0.448	0.652	0.5	0.7	0.7
FSU-12 4/	1.377	1.648	1.951	1.804	1.3	1.6	1.6
Russia	1.035	1.361	1.504	1.316	0.9	1.3	1.3
Middle East	5.566	7.927	5.802	6.311	4.5	6.1	6.0
Turkey	1.991	2.509	1.882	2.182	1.5	2.0	1.9
Saudi Arabia	0.836	1.223	1.135	1.132	0.8	1.1	1.1
Africa	4.932	7.674	5.688	5.441	3.9	5.6	5.6
North Africa	2.772	4.748	2.980	2.776	2.0	2.9	2.9
Egypt	1.569	2.974	1.788	1.668	1.2	1.8	1.8
Sub-Saharan Africa	2.160	2.926	2.707	2.665	1.9	2.7	2.7
Nigeria	0.870	1.315	1.086	1.104	0.8	1.1	1.1
Oceania	1.380	1.549	1.728	1.861	1.3	1.8	1.8
Trans-shipments via Canada 5/	0.315	0.346	0.122	0.000	0.0	0.0	0.0
<b>Total</b>	<b>108.529</b>	<b>137.389</b>	<b>135.815</b>	<b>140.936</b>	<b>100.0</b>	<b>135.0</b>	<b>137.0</b>

Totals may not add due to rounding.

1/ Projections are based primarily on trend or recent average growth analysis.

2/ The former EU-27 and Croatia, which acceded in July 2013.

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

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

5/ Trans-shipments through Canada have not been allocated to final destination, but are included in the total.

Source: Compiled by USDA using data from U.S. Census Bureau, U.S. Department of Commerce.

## Import Products

As world food commodity prices appear to have stabilized in recent months and the U.S. economy continues to recover, agricultural imports in fiscal 2014 are projected to rise to \$109.5 billion, 5.4 percent higher than in fiscal 2013. This forecast is \$3.5 billion lower than the August estimate, which assumed a more robust economic recovery in 2014.

In fiscal year 2013, despite the relatively weak recovery of the domestic economy, U.S. consumers continued their strong demand for imported foods, beverages, and other farm products and import volume rose 11 percent. However, lower prices for tropical commodities limited the increase in import value. Import volume averaged an 8.4-percent growth rate during fiscal 2011-13, compared to only 2.2 percent during the previous 4 years.

Real disposable income grew by an average of 1.8 percent in fiscal year 2013, close to 2012's 1.3-percent growth. A somewhat stronger income outlook is expected heading into fiscal 2014. Nevertheless, given currently subdued farm commodity prices, which are also generally linked to lower energy prices (petroleum and natural gas), U.S. agricultural import value in 2014 is expected to grow moderately at a 5.4-percent rate, which largely represents projected import volume growth.

Tropical commodity prices in 2013 were mostly lower than in 2012 and even lower than in 2011. Prices for coffee, coconut oil, palm oil, rubber, and sugar are all moderately lower than in 2012, but significantly lower than in 2011. However, prices for cocoa beans and olive oil are now higher on average than in 2012, but still lower than in 2011. Food commodity prices were generally flat during recent months. Lower petroleum prices are helping to keep transport costs in check, which is a factor in holding import costs down. Also, the dollar's exchange value has been stable over the past 2 years, which, to some extent, is preventing imported crude oil prices from rising again.

The new import projection of \$109.5 billion in 2014 reflects gains from 2013 except for grains and oilseeds, whose U.S. production is expected up from last year. Import value projections were reduced for coffee, rubber, cocoa, sugar, oilseeds and oilmeal, and grains. Imports of feed grains, especially corn, are behind the sharp downward correction for bulk grains. Larger domestic production of corn underlies the smaller U.S. import projection for corn. Imports of other feed grains are largely unchanged from 2013. However, import estimates for wheat and rice are both higher than in 2013. U.S. imports of oilseeds and oilmeal are projected to be lower as domestic soybean production is anticipated higher in 2013/14.

The import estimate for total livestock and dairy products in 2014 is reduced by \$500 million from the preceding forecast, with lower beef and dairy imports offsetting higher pork and cattle imports. The reduction stems from the \$700-million cut in beef and veal imports as supplier volume is expected to decline sharply, by 140,000 tons. Still, the \$3.9 billion forecast for beef is \$220 million higher than the level in 2013. The import projection for pork is raised by \$170 million as 17,000 more tons of the meat is expected, mostly from Canada. Relatively high hog prices and moderating feed costs are likely to increase farrowings in Canada next year, supporting higher exports by Canada. The dairy import forecast is cut as domestic milk production is expected to be larger. Feed



prices are expected to moderate in 2014, which help boost herd size for dairy, meat, and poultry.

Imports of horticultural crops and products are projected to increase by \$4 billion in 2014 as import demand for fresh fruits and vegetables, processed fruit, wine, and essential oils continue their healthy year-to-year growth. Indeed, all the other imported horticulture products show projected increases from 2013. Horticulture's share of total imports is anticipated at 44 percent, up from 42 percent in 2013. Overall, import demand for horticulture products was up 6.6 percent in 2013, compared to only 2 percent for livestock and dairy imports. Beer imports fell in fiscal 2013 as three major foreign brewers relocated production facilities to the United States.

For tropical oils, import volume is up 13 percent from 2013, versus a 13-percent decline for other vegetable oils. Palm oil is in demand as the main replacement for trans fat in processed foods. Lower prices for these food oils and other tropical commodities—sugar, natural rubber, coffee, cocoa—were largely responsible for the minuscule 0.5-percent growth of U.S. farm imports in 2013. If these low prices remain stable through 2014, and import demand responds accordingly, the total import bill is anticipated to easily exceed 2013's very modest expansion. As consumer spending keeps pace with recent income growth, imports are projected to increase at least moderately. Additionally, if U.S. interest rates rise next year and the dollar follows upward, import volume is expected to continue its strong growth.

Table 5--U.S. agricultural imports: Value and volume, by commodity, 2010-14

Commodity	Fiscal year				Forecast fiscal year	
	2010	2011	2012	2013	2014	
					Aug.	Nov.
<b>VALUE</b>						
--- Billion dollars ---						
Livestock and dairy products	10.845	11.847	13.281	13.742	15.1	14.6
Livestock and meats	7.950	8.620	9.652	10.091	11.2	10.7
Cattle and calves	1.546	1.483	1.704	1.808	1.8	1.9
Swine	0.344	0.355	0.348	0.329	0.3	0.3
Beef and veal	2.852	3.015	3.623	3.679	4.6	3.9
Pork	1.162	1.288	1.334	1.416	1.3	1.5
Dairy products	2.415	2.706	3.014	2.998	3.2	3.1
Cheese	0.963	1.061	1.059	1.148	1.3	1.3
Grains and feed	7.484	8.350	9.514	11.281	10.8	9.3
Grain products	4.885	5.384	5.749	6.175	6.7	6.7
Oilseeds and products	5.268	7.663	8.654	8.833	9.3	8.9
Vegetable oils	3.784	5.589	5.759	5.231	5.5	5.5
Horticulture products	35.559	39.407	41.557	44.115	47.8	48.1
Fruits, fresh	6.792	7.126	7.617	8.343	9.0	9.1
Fruits, processed	3.276	4.263	4.360	4.714	5.4	5.3
Fruit juices	1.280	1.840	1.763	1.894	2.3	2.1
Nuts, whole and processed	1.331	1.714	1.802	1.811	2.0	2.0
Vegetables, fresh	5.181	5.722	5.829	6.540	7.0	7.2
Vegetables, processed	3.574	3.915	4.203	4.220	4.4	4.4
Wine	4.258	4.777	5.084	5.356	5.8	5.8
Malt beer	3.452	3.512	3.722	3.581	3.9	3.7
Essential oils	2.434	2.534	2.569	2.789	3.1	3.2
Cut flowers and nursery stock	1.441	1.522	1.622	1.666	1.8	1.8
Sugar and tropical products	18.315	25.594	28.312	23.460	27.0	25.3
Sweeteners & products	4.112	5.078	5.223	4.611	5.0	4.9
Confections	1.279	1.391	1.461	1.541	1.8	1.9
Cocoa and chocolate	4.239	4.633	4.117	4.020	4.3	4.2
Coffee beans and products	4.389	7.337	7.782	6.057	6.9	6.4
Rubber, natural	2.433	4.430	3.791	2.673	3.4	3.0
Other imports 1/	1.492	1.650	2.050	2.414	3.0	3.4
Total agricultural imports	78.963	94.511	103.367	103.845	113.0	109.5
<b>VOLUME</b>						
--- Million metric tons 2/---						
Wine 3/	0.972	1.003	1.202	1.183	1.3	1.3
Malt beer 3/	3.112	3.159	3.287	3.133	3.3	3.2
Fruit juices 3/	4.163	4.407	3.591	4.518	5.1	5.1
Cattle and calves 4/	2.251	2.146	2.327	2.032	2.0	2.0
Swine 4/	5.805	5.703	5.784	5.263	5.2	4.8
Beef and veal	0.804	0.683	0.744	0.733	0.9	0.7
Pork	0.374	0.352	0.354	0.371	0.4	0.4
Fruits, fresh	9.101	9.268	9.600	10.420	11.1	11.3
Fruits, processed	1.408	1.481	1.503	1.685	1.9	2.0
Vegetables, fresh	5.378	5.513	5.694	6.030	6.4	6.4
Vegetables, processed	2.925	3.027	3.202	3.200	3.4	3.4
Vegetable oils	3.456	3.746	3.976	3.961	4.3	4.2
Cocoa and chocolate	1.242	1.319	1.235	1.258	1.3	1.3
Coffee beans	1.276	1.465	1.538	1.525	1.6	1.6

Totals may not add due to rounding.

1/ Largely tobacco and planting seeds. 2/ With exceptions footnoted. 3/Liquid volume is in billion liters.

4/ Million head.

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

## Regional Imports

Imports from most supplying countries are expected to be higher in fiscal 2014 than in the year before, with Canada, Mexico, and the European Union accounting for most of the gains. Slightly lower imports are expected from India and Indonesia.

Among the suppliers of U.S. agricultural imports, the regions that have gained the most over the past decade are South Asia (India), Other Europe (Switzerland, Norway, the Balkan countries), the Former Soviet Union (Russia, Ukraine, Central Asian countries), North Africa (Tunisia, Morocco, Egypt), East and Southeast Asia, and South America. Although many of these countries started from a small base, they pursued export opportunities in the rich and diverse market of the United States. In Southeast Asia, Vietnam and the Philippines are fast on Malaysia's trail. In South America, Argentina, Peru, and Ecuador are inching up on Colombia. These countries largely supply off-season horticulture crops stateside.

In terms of import volume growth, the top supplier countries to the United States since 2004 are Brazil, Argentina, Malaysia, Mexico, India, and China. With respect to imported food groups, the fastest growing in import value over the past decade (2003-2012) were vegetable oils, coffee and tea, tree nuts, cereals and bakery products, sugar and candy, cocoa and chocolate. These imports together accounted for a third of total U.S. food import value in fiscal 2012. The principal suppliers of these imported high-value products are the same countries that have dominated export growth to the United States in the past 10 years.

Table 6--U.S. agricultural imports: Value by region, 2010-14

Region and country	Fiscal year				Forecast fiscal year	
	2010	2011	2012	2013	2014	
					Aug.	Nov.
<b>VALUE</b>	<i>-- Billion dollars--</i>				<i>-- Billion dollars--</i>	
Western Hemisphere	42.871	50.818	55.215	57.284	61.5	60.3
Canada	15.682	17.946	19.986	21.557	23.3	23.0
Mexico	12.972	15.428	16.277	17.215	18.4	18.2
Central America	3.753	4.746	5.179	4.693	5.1	4.9
Costa Rica	1.238	1.433	1.524	1.469	1.6	1.6
Guatemala	1.381	1.767	1.985	1.866	1.9	1.9
Other Central America	1.134	1.546	1.670	1.358	1.5	1.5
Caribbean	0.577	0.589	0.630	0.473	0.5	0.5
South America	9.887	12.109	13.143	13.345	14.2	13.8
Argentina	1.087	1.493	1.731	1.820	2.0	1.9
Brazil	2.644	3.460	3.791	3.751	3.9	3.9
Chile	2.274	2.324	2.499	2.843	3.1	3.0
Colombia	1.852	2.343	2.336	2.141	2.3	2.2
Other South America	2.029	2.489	2.786	2.789	2.9	2.9
Europe and Eurasia	15.008	16.624	17.665	18.656	20.2	19.5
European Union-28 1/	14.188	15.675	16.635	17.332	18.6	18.1
Other Europe	0.757	0.886	0.933	1.210	1.4	1.3
Asia	14.056	19.022	22.250	19.399	21.7	20.5
East Asia	4.363	5.191	5.692	5.864	6.4	6.1
China	3.208	3.916	4.350	4.458	4.8	4.6
Other East Asia	1.154	1.275	1.342	1.406	1.5	1.5
Southeast Asia	8.053	11.386	10.916	9.597	10.4	10.1
Indonesia	2.632	3.954	3.666	3.127	3.3	3.3
Malaysia	1.604	2.286	2.032	1.684	1.9	1.8
Thailand	1.917	2.574	2.458	2.216	2.4	2.4
Other Southeast Asia	1.901	2.571	2.759	2.570	2.8	2.7
South Asia	1.640	2.445	5.642	3.938	5.0	4.4
India	1.498	2.251	5.392	3.695	4.6	4.1
Oceania	4.053	4.389	4.887	4.989	5.6	5.3
Australia	2.319	2.360	2.558	2.719	3.0	2.9
New Zealand	1.626	1.926	2.174	2.177	2.5	2.4
Africa	2.222	2.787	2.415	2.405	2.7	2.6
Sub-Saharan Africa	1.947	2.427	2.108	2.063	2.3	2.2
Ivory Coast	0.908	1.052	0.837	0.890	1.0	1.0
Middle East	0.754	0.872	0.935	1.113	1.2	1.2
Turkey	0.423	0.520	0.550	0.714	0.8	0.8
<b>World total</b>	<b>78.963</b>	<b>94.511</b>	<b>103.367</b>	<b>103.845</b>	<b>113.0</b>	<b>109.5</b>

Totals may not add due to rounding.

1/ The former EU-27 and Croatia, which acceded in July 2013.

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

# Reliability Tables

Table 7--Reliability of quarterly U.S. export projections, by commodity and quarter

Commodity	Absolute forecast errors Fiscal 2013					Forecast accuracy Fiscal 2013					Forecast accuracy
	Aug 2012	Nov 2012	Feb 2013	May 2013	Aug 2013	Aug 2012	Nov 2012	Feb 2013	May 2013	Aug 2013	
<b>Export value</b>	<i>Percent</i>					<i>"X" if error &lt; 5%</i>					<i>Percent</i>
Grains and feeds	25	19	5	4	3	-	-	X	X	X	60
Wheat	22	15	1	11	5	-	-	X	-	X	40
Rice	14	5	5	0	5	-	X	X	X	X	80
Coarse grains	110	87	35	8	2	-	-	-	-	X	20
Corn	116	91	39	7	2	-	-	-	-	X	20
Feeds and fodders	7	11	9	7	2	-	-	-	-	X	20
Oilseeds and products	12	2	1	2	1	-	X	X	X	X	80
Soybeans	5	8	6	6	0	X	-	-	-	X	40
Soybean meal	38	31	22	13	4	-	-	-	-	X	20
Soybean oil	36	36	18	9	0	-	-	-	-	X	20
Livestock, poultry, and dairy	5	5	4	4	2	-	-	X	X	X	60
Livestock products	0	1	1	2	1	X	X	X	X	X	100
Beef and veal	4	8	4	2	2	X	-	X	X	X	80
Pork	8	8	4	4	2	-	-	X	X	X	60
Beef and pork variety meats	7	7	7	7	0	-	-	-	-	X	20
Hides, skins, and furs	6	10	10	3	0	-	-	-	X	X	40
Poultry and products	5	6	3	3	2	X	-	X	X	X	80
Broiler meat	7	5	2	5	0	-	X	X	X	X	80
Dairy products	21	18	18	13	5	-	-	-	-	X	20
Tobacco, unmanufactured	8	8	8	8	0	-	-	-	-	X	20
Cotton	14	18	11	2	2	-	-	-	X	X	40
Planting seeds	6	6	6	6	6	-	-	-	-	-	0
Horticultural products	2	2	2	2	2	X	X	X	X	X	100
Fruits and vegetables, fresh	4	4	4	4	4	X	X	X	X	X	100
Fruits and veget., processed	4	4	4	4	4	X	X	X	X	X	100
Tree nuts	3	3	3	3	3	X	X	X	X	X	100
Sugar and tropical products	16	16	11	3	0	-	-	-	X	X	40
Major bulk products	15	16	6	1	1	-	-	-	X	X	40
Total agricultural exports	2	3	1	1	1	X	X	X	X	X	100
Average error & accuracy	18	16	9	5	2	31%	31%	52%	62%	97%	54
<b>Export volume</b>											
Wheat	3	2	7	13	6	X	X	-	-	-	40
Rice	13	8	5	0	3	-	-	-	X	X	40
Coarse grains	77	64	26	6	4	-	-	-	-	X	20
Corn	84	70	32	7	4	-	-	-	-	X	20
Feeds and fodders	0	8	11	6	3	X	-	-	-	X	40
Soybeans	14	5	5	5	1	-	X	X	X	X	80
Soybean meal	37	29	21	11	2	-	-	-	-	X	20
Soybean oil	50	50	0	0	0	-	-	X	X	X	60
Beef and veal	13	0	0	0	0	-	X	X	X	X	80
Pork	6	6	6	0	0	-	-	-	X	X	40
Beef and pork variety meats	0	13	13	13	13	X	-	-	-	-	20
Broiler meat	6	3	0	0	3	-	X	X	X	X	80
Tobacco, unmanufactured	0	0	0	0	0	X	X	X	X	X	100
Cotton	10	14	7	0	0	-	-	-	X	X	40
Major bulk products	12	16	5	1	3	-	-	X	X	X	60
Average error & accuracy	22	19	9	4	3	27%	33%	40%	60%	87%	49

- = Error exceeds 5 percent.

Table 8--Reliability of quarterly U.S. export projections, by country and quarter

Country/region	Average forecast errors Fiscal 2013					Forecast accuracy Fiscal 2013					Forecast accuracy
	Aug. 2012	Nov. 2012	Feb. 2013	May 2013	Aug. 2013	Aug. 2012	Nov. 2012	Feb. 2013	May 2013	Aug. 2013	
<b>Export value</b>	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					
Asia	34	3	1	0	1	-	X	X	X	X	80
East Asia	2	4	3	1	2	X	X	X	X	X	100
Japan	15	17	9	2	2	-	-	-	X	X	40
China	13	10	6	4	4	-	-	-	X	X	40
Hong Kong	11	11	3	6	8	-	-	X	-	-	20
Taiwan	13	13	13	3	3	-	-	-	X	X	40
South Korea	27	31	21	10	0	-	-	-	-	X	20
Southeast Asia	10	5	7	2	5	-	X	-	X	X	60
Indonesia	23	4	4	4	0	-	X	X	X	X	80
Philippines	0	0	0	0	0	X	X	X	X	X	100
Malaysia	20	20	0	0	0	-	-	X	X	X	60
Thailand	36	36	36	7	7	-	-	-	-	-	0
Vietnam	24	24	24	0	0	-	-	-	X	X	40
South Asia	6	6	6	18	18	-	-	-	-	-	0
India	20	20	20	0	0	-	-	-	X	X	40
Western Hemisphere	1	1	1	3	1	X	X	X	X	X	100
North America	2	2	1	1	0	X	X	X	X	X	100
Canada	2	2	2	2	0	X	X	X	X	X	100
Mexico	6	6	3	1	1	-	-	X	X	X	60
Caribbean	8	8	3	3	3	-	-	X	X	X	60
Dominican Republic	18	18	0	0	0	-	-	X	X	X	60
Central America	30	30	30	0	3	-	-	-	X	X	40
South America	23	23	21	17	7	-	-	-	-	-	0
Brazil	56	56	56	56	13	-	-	-	-	-	0
Colombia	43	43	21	0	0	-	-	-	X	X	40
Peru	0	0	29	29	29	1	1	-	-	-	40
Venezuela	6	6	6	6	6	-	-	-	-	-	0
Europe and Eurasia	11	9	9	9	5	-	-	-	-	X	20
European Union-27	13	11	11	11	4	-	-	-	-	X	20
Other Europe	43	43	43	43	0	-	-	-	-	X	20
FSU-12	17	17	17	17	11	-	-	-	-	-	0
Russia	38	38	38	38	0	-	-	-	-	X	20
Middle East	25	25	21	13	5	-	-	-	-	X	20
Turkey	14	14	5	5	5	-	-	X	X	X	60
Saudi Arabia	0	0	0	0	0	X	X	X	X	X	100
Africa	48	44	26	19	9	-	-	-	-	-	0
North Africa	68	61	32	32	14	-	-	-	-	-	0
Egypt	65	53	18	18	18	-	-	-	-	-	0
Sub-Saharan Africa	22	22	15	0	0	-	-	-	X	X	40
Nigeria	18	18	0	0	0	-	-	X	X	X	60
Oceania	84	21	21	21	5	-	-	-	-	-	0
Transshipments via Canada	22	19	14	10	5	X	X	X	X	X	41
Average error and accuracy	19	20	17	14	11	24%	24%	26%	45%	52%	34

- = Error exceeds 5 percent.

Table 9--Reliability of quarterly U.S. import projections, by commodity and quarter

Commodity	Average forecast errors Fiscal 2013					Forecast accuracy Fiscal 2013					Forecast accuracy
	Aug. 2012	Nov. 2012	Feb. 2013	May 2013	Aug. 2013	Aug. 2012	Nov. 2012	Feb. 2013	May 2013	Aug. 2013	
<b>Import value</b>			<i>Percent</i>					<i>"X" if error ≤ 5%</i>			<i>Percent</i>
Livestock, poultry, and dairy	3	4	4	8	2	X	X	X	-	X	80
Livestock and meats	2	2	2	7	2	X	X	X	-	X	80
Cattle and calves	28	28	17	6	0	-	-	-	-	X	20
Swine	33	33	33	0	0	-	-	-	X	X	40
Beef and veal	14	11	11	11	3	-	-	-	-	X	20
Pork	0	7	7	7	7	X	-	-	-	-	20
Dairy products	3	7	3	7	3	X	-	X	-	X	60
Cheese	0	0	0	9	9	X	X	X	-	-	60
Grains and feed	6	3	3	2	3	-	X	X	X	X	80
Grain products	0	0	0	2	0	X	X	X	X	X	100
Oilseeds and products	19	14	10	5	1	-	-	-	X	X	40
Vegetable oils	25	17	8	4	0	-	-	-	X	X	40
Horticulture products	3	1	4	7	0	X	X	X	-	X	80
Fruits, fresh	4	4	1	8	0	X	X	X	-	X	80
Fruits, preserved	2	4	21	21	2	X	X	-	-	X	60
Fruit juices	5	0	0	16	5	-	X	X	-	-	40
Nuts and preparations	28	11	11	11	6	-	-	-	-	-	0
Vegetables, fresh	3	5	8	0	2	X	X	-	X	X	80
Vegetables, processed	17	10	7	5	0	-	-	-	X	X	40
Wine	0	0	6	6	0	X	X	-	-	X	60
Malt beer	11	11	8	6	0	-	-	-	-	X	20
Essential oils	7	4	4	4	0	-	X	X	X	X	80
Cut flowers and nursery stock	0	0	0	0	0	X	X	X	X	X	100
Sugar and tropical products	45	37	20	11	3	-	-	-	-	X	20
Sweeteners and products	30	20	0	9	0	-	-	X	-	X	40
Confections	7	7	7	7	7	-	-	-	-	-	0
Cocoa and products	18	13	13	2	3	-	-	-	X	X	40
Coffee beans and products	48	36	21	5	0	-	-	-	X	X	40
Natural rubber	78	63	44	15	4	-	-	-	-	X	20
Other imports	4	4	17	4	4	X	X	-	X	X	80
Total agricultural imports	13	11	8	7	1	-	-	-	-	X	20
Average error and accuracy	15	12	10	7	2	42%	45%	39%	39%	84%	50
<b>Import volume</b>											
Wine (HL)	17	17	8	8	0	-	-	-	-	X	20
Malt beer (HL)	6	6	6	3	3	-	-	-	X	X	40
Fruit juices (HL)	16	16	11	11	4	-	-	-	-	X	20
Cattle and calves	5	5	0	10	0	X	X	X	-	X	80
Swine	8	4	4	2	0	-	X	X	X	X	80
Beef and veal	29	14	14	14	14	-	-	-	-	-	0
Pork	0	0	25	25	0	X	X	-	-	X	60
Fruits--fresh	8	4	1	2	1	-	X	X	X	X	80
Fruits--processed	6	6	6	6	0	-	-	-	-	X	20
Vegetables--fresh	2	2	2	2	0	X	X	X	X	X	100
Vegetables--processed	6	6	6	3	0	-	-	-	X	X	40
Vegetable oils	13	8	0	5	3	-	-	X	X	X	60
Cocoa and products	8	0	0	8	8	-	X	X	-	-	40
Coffee beans and products	7	7	7	0	0	-	-	-	X	X	40
Average error and accuracy	9	7	6	7	2	21%	43%	43%	50%	86%	49

- = Error exceeds 5 percent. HL = hectoliters.

Table 10--Reliability of quarterly U.S. import projections, by country and quarter

Country/region	Average forecast errors Fiscal 2013					Forecast accuracy Fiscal 2013					Forecast accuracy
	Aug. 2012	Nov. 2012	Feb. 2013	May 2013	Aug. 2013	Aug. 2012	Nov. 2012	Feb. 2013	May 2013	Aug. 2013	
<b>Import value</b>	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Western Hemisphere	7	7	2	5	0	-	-	X	X	X	60
Canada	5	12	5	6	1	-	-	X	-	X	40
Mexico	21	6	23	19	0	-	-	-	-	X	20
Central America	7	7	7	13	0	-	-	-	-	X	20
Costa Rica	21	5	16	11	5	-	-	-	-	-	0
Guatemala	29	21	43	21	0	-	-	-	-	X	20
Other Central America	40	20	40	40	0	-	-	-	-	X	20
Caribbean	17	3	5	1	1	-	X	-	X	X	60
South America	17	6	6	6	6	-	-	-	-	-	0
Argentina	26	3	5	5	5	-	X	-	-	-	20
Brazil	4	14	4	4	4	X	-	X	X	X	80
Chile	19	5	19	0	0	-	X	-	X	X	60
Colombia	18	0	4	0	4	-	X	X	X	X	80
Other South America	3	12	1	2	1	X	-	X	X	X	80
Europe and Eurasia	5	11	1	1	0	X	-	X	X	X	80
European Union-27	8	17	8	25	8	-	-	-	-	-	0
Other Europe	28	11	23	11	4	-	-	-	-	X	20
Asia	5	8	12	10	0	-	-	-	-	X	20
East Asia	4	7	16	11	0	X	-	-	-	X	40
China	0	14	0	7	0	X	-	X	-	X	60
Other East Asia	32	11	19	5	1	-	-	-	-	X	20
Southeast Asia	39	13	23	3	0	-	-	-	X	X	40
Indonesia	41	18	24	6	6	-	-	-	-	-	0
Malaysia	32	9	18	9	0	-	-	-	-	X	20
Thailand	23	8	12	0	0	-	-	-	X	X	40
Other Southeast Asia	54	41	51	26	18	-	-	-	-	-	0
South Asia	54	41	51	24	16	-	-	-	-	-	0
India	14	0	18	18	4	-	X	-	-	X	40
Oceania	15	0	15	15	4	-	X	-	-	X	40
Australia	9	0	18	18	5	-	X	-	-	X	40
New Zealand	25	4	8	8	4	-	X	-	-	X	40
Africa	24	0	5	0	0	-	X	X	X	X	80
Sub-Saharan Africa	22	0	0	0	0	-	X	X	X	X	80
Ivory Coast	9	18	9	9	0	-	-	-	-	X	20
Middle East	29	29	14	14	0	-	-	-	-	X	20
Turkey	20	11	15	10	3	-	-	-	-	X	20
Average error & accuracy	20	11	15	10	3	14%	28%	25%	31%	81%	36

- = Error exceeds 5 percent.



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### Related Websites

Outlook for U.S. Agricultural Trade

<http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1196>

Foreign Agricultural Service homepage: <http://www.fas.usda.gov/>

Economic Research Service homepage: <http://www.ers.usda.gov/>

U.S. Trade Data: <http://www.fas.usda.gov/gats>

FAQ & Summary Data: [http://www.ers.usda.gov/data-products/foreign-agricultural-trade-of-the-united-states-\(fatus\).aspx](http://www.ers.usda.gov/data-products/foreign-agricultural-trade-of-the-united-states-(fatus).aspx)

Articles on U.S. Trade: <http://www.ers.usda.gov/topics/international-markets-trade/us-agricultural-trade.aspx>

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