



# Sugar and Sweeteners Outlook

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## Projections of Early 2016/17 Sugarbeet Crop Production and Increased Florida Cane Sugar Lead to Larger Projected Stocks for 2015/16

The next release is  
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Approved by the  
World Agricultural  
Outlook Board.

U.S. sugar production in 2016/17 is projected to decline 2.6 percent, totaling 8.710 million short tons, raw value (STRV). Beet sugar production is projected to increase 0.5 percent, as the reported early planting should result in higher than average sugarbeet yields. Cane sugar production is projected to decline 6.9 percent to 3.620 million STRV, as cane-producing regions are expected to return to trend yields. Florida is projected to decline 10.0 percent, while production in Louisiana is projected to increase 4.8 percent. Hawaii is projected to produce only 40,000 STRV in 2016/17, as the State's sole remaining sugar mill ceases production at the end of the calendar year. Total sugar use in 2016/17 is projected to total 12.275 million STRV, a 0.3-percent increase from the previous year. This is mostly due to domestic deliveries for food and beverage use, projected to increase 0.7 percent to 12.080 million STRV. Imports are projected to total 3.479 million STRV, a 7.1-percent increase from the 2015/16 estimate. Imports from Mexico are projected to increase 26.1 percent to 1.758 million STRV due to a higher expected Export Limit.

U.S. ending stocks for 2015/16 are projected to be 1.743 million STRV, a 124,000-STRV increase from the April projection. As a result, the stocks-to-use ratio is estimated to increase to 14.2 percent compared with 13.3 percent in April. Estimated supplies for 2015/16 are increased 169,000 STRV, as beet sugar production is increased 65,000 STRV to 5.064 million STRV, primarily due to early planting of the 2016/17 crop that will result in a higher proportion of that crop's production coming at the end of the 2015/16 fiscal year. Estimated cane sugar production is increased 75,000 STRV to 2.166 million STRV based on higher estimated production in Florida. Estimated imports for 2015/16 are 22,000 STRV higher than the previous month due to the increase in the specialty sugar quota announced by the USDA on May 5, 2016. Total sugar use in 2015/16 is increased 45,000 STRV due to more deliveries for food and beverage use, based on reported data from the first half of the fiscal year.

Estimated 2015/16 sugar production in Mexico is increased 128,000 metric tons, actual weight (MT), in May to 6.184 million MT. Deliveries to domestic users are estimated to be 70,000 MT less than the previous month, totaling 4.586 million MT, of which 4.331 million MT are expected to be for human consumption. Ending stocks for 2015/16 are raised to 1.358 million MT, resulting in a relatively high stocks-to-consumption ratio of 31.4 percent. Production in 2016/17 is projected to decline slightly to 6.100 million MT, and domestic deliveries are projected to increase to 4.652 million MT. Mexican sugar exports are projected to increase 35.1 percent from the previous year to 1.515 million MT, primarily due to increased shipments to the United States. Ending stocks for 2016/17 are projected to decline from the previous year to 1.301 million MT, but the stocks-to-consumption ratio will remain at a relatively large 29.6 percent.

## Early Planting for 2016/17 Sugarbeet Crop Increases Estimated Early-Season Production

Total sugar supplies for the 2016/17 U.S. sugar market are projected to total 13.932 million short tons, raw value (STRV) in the May *World Agricultural Supply and Demand Estimates* (WASDE), a 0.3-percent decrease from estimated 2015/16 supplies. Beginning stocks in 2016/17 are projected to be 1.743 million STRV, 4.1-percent lower than the carryover from the previous year. Beginning stocks in 2015/16 are increased 7,000 STRV to 1.815 million STRV due to production revisions made by cane processors to the 2014/15 balance sheet.

U.S. sugar production in 2016/17 is projected to total 8.710 million STRV, a 2.6-percent decrease from the current 2015/16 estimate. Beet sugar production is projected to total 5.090 million STRV, which would represent a 0.5-percent increase from the prior year. Crop year (August to July) production is projected to total 5.218 million STRV, which is 2.1 percent higher than current 2015/16 crop year production estimates. The *National Agricultural Statistics Service* (NASS) *Prospective Plantings* report published in March shows that planted sugarbeet area is expected to be 1.159 million acres, only a 200-acre decline from the previous year. The 2016/17 beet sugar production projection assumes that sugarbeet yields follow trend and are positively adjusted for the early planting progress seen through May and that sugar extraction yields are in line with historical relationships with sugarbeet yields.

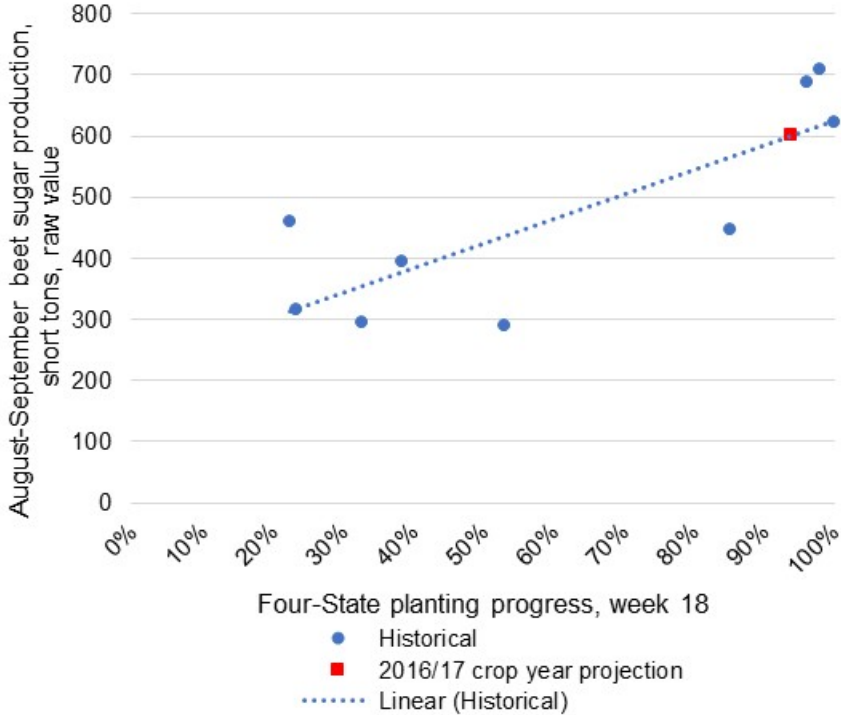
Table 1 -- U.S. sugar: supply and use, by fiscal year (Oct./Sept.), May 2016.

Items	2014/15			2015/16			2016/17		
	2014/15	2015/16 (estimate)	2016/17 (forecast)	2014/15	2015/16 (estimate)	2016/17 (forecast)	2014/15	2015/16 (estimate)	2016/17 (forecast)
	1,000 Short tons, raw value			1,000 Metric tons, raw value					
Beginning stocks	1,810	1,815	1,743	1,642	1,647	1,582			
Total production	8,656	8,933	8,710	7,853	8,103	7,901			
Beet sugar	4,893	5,064	5,090	4,439	4,594	4,617			
Cane sugar	3,763	3,869	3,620	3,414	3,510	3,284			
Florida	1,981	2,166	1,970	1,797	1,965	1,787			
Louisiana	1,513	1,423	1,495	1,372	1,291	1,356			
Texas	123	115	115	112	104	104			
Hawaii	146	165	40	132	150	36			
Total imports	3,553	3,231	3,479	3,223	2,931	3,156			
Tariff-rate quota imports	1,536	1,617	1,531	1,393	1,467	1,389			
Other program imports	471	300	175	427	272	159			
Non-program imports	1,546	1,314	1,773	1,403	1,192	1,609			
Mexico	1,532	1,299	1,758	1,389	1,178	1,595			
Total supply	14,019	13,978	13,932	12,718	12,681	12,639			
Total exports	185	100	50	168	91	45			
Miscellaneous	0	0	0	0	0	0			
Deliveries for domestic use	12,019	12,135	12,225	10,903	11,009	11,090			
Transfer to sugar-containing products for exports under re-export program	103	100	110	93	91	100			
Transfer to polyhydric alcohol, feed, other alcohol	28	35	35	25	32	32			
Commodity Credit Corporation (CCC) sale for ethanol, other	0	0	0	0	0	0			
Deliveries for domestic food and beverage use	11,888	12,000	12,080	10,785	10,886	10,959			
Total Use	12,204	12,235	12,275	11,071	11,099	11,136			
Ending stocks	1,815	1,743	1,657	1,647	1,582	1,503			
Private	1,815	1,743	1,657	1,647	1,582	1,503			
Commodity Credit Corporation (CCC)	0	0	0	0	0	1			
Stocks-to-use ratio	14.87	14.25	13.50	14.87	14.25	13.50			

Source: U.S. Dept. of Agriculture, Economic Research Service, Sugar and Sweetener Outlook.

There has been a historical relationship between early plantings of sugarbeets and the early harvesting and beet sugar production from the new crop in August and September. This early-season production for the 2016/17 crop would be accounted for as production in the 2015/16 balance sheet, with the remaining production from the crop accounted for in 2016/17 production. Through May 8, total U.S. planting of sugarbeets is 94 percent complete. Additionally, the top four sugarbeet producing States—Minnesota, North Dakota, Idaho, and Michigan—are also 94-percent planted through the same period, which is only slightly behind last year’s pace of 96 percent. Early planting in these States often leads to higher sugarbeet yields and a larger proportion of beet sugar production in August and September—assuming that normal weather conditions occur during the growing season. The current projection assumes August and September 2017 beet sugar production from the 2017/18 crop to be in line with historical averages.

Figure 1  
**Planting progress and early beet sugar production, crop year,  
 2007/08 to 2016/17**



Source: Economic Research Service, U.S. Dept. of Agriculture; National Agricultural Statistics Service, USDA.

Beet sugar production for 2015/16 is estimated at 5.064 million STRV, a 65,000-STRV increase from the April projection. The 2015/16 crop year production figure was reduced by 61,000 STRV from the previous month. The reduction is due to processors’ increase in forecast shrink and an adjusted sugar-extracted projection based on pace-to-date data from processors, but it is slightly offset by higher expected production from molasses compared with the previous month’s report. The crop year decline is more than offset by the increase in early-season production forecast from the 2016/17 crop.

Table 2: Beet sugar production projection calculation, 2015/16

	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16 April	2015/16 May
Sugarbeet production (1,000 short tons) 1/	29,783	32,034	28,896	35,224	32,789	31,285	35,280	35,280
Sugarbeet shrink 2/	5.7%	5.9%	5.9%	4.8%	6.8%	5.4%	7.6%	8.1%
Sugarbeets sliced (1,000 short tons)	28,097	30,137	27,184	33,532	30,545	29,595	32,599	32,422
Sugar extraction rate from slice	14.3%	15.4%	15.0%	15.3%	14.3%	14.6%	14.7%	14.6%
Sugar from beets slice (1,000 STRV)	4,023	4,631	4,086	5,142	4,325	4,325	4,786	4,723
Sugar from molasses (1,000 STRV) 2/	325	357	401	327	324	341	388	390
Crop year sugar production (1,000 STRV) 3/	4,348	4,987	4,487	5,469	4,648	4,667	5,174	5,113
August-September sugar production (1,000 STRV)	396	623	294	708	315	461	688	688
August-September sugar production forecast (1,000 STRV) 4/	--	--	--	--	--	--	473	600
Sugar from imported beets (1,000 STRV) 5/	--	--	--	--	--	--	40	39
Fiscal year sugar production (1,000 STRV)	4,575	4,659	4,900	5,076	4,794	4,893	4,998	5,064

Notes: 1/ NASS, USDA. 2/Projections based on processor forecasts published by FSA. 3/ August-July basis. 4/ Based on 2016/17 production. 5/ Sugar from imported beets split out for projections only. They are incorporated into total production in historical data.

Source: Economic Research Service, USDA; World Agricultural Outlook Board, USDA.

### ***Cane Sugar Production in 2016/17 Projected To Decline as Yields Return to Trend Levels; Hawaii Production Ceases***

Cane sugar production in 2016/17 is projected to total 3.620 million STRV, a 6.9-percent decline from the 2015/16 estimate. Florida production is projected to total 1.970 million STRV, a decrease of 10.0 percent from the previous year, as cane yields and recovery rates are projected to be in line with historical averages after 2 consecutive years of favorable weather conditions that allowed for large sugarcane crops. Louisiana production is projected to be 1.495 million STRV, an increase of 4.8 percent, as yields and recovery rates are expected to improve from the 2015/16 crop that experienced detrimental weather early in the harvest period. Hawaii production is projected to total 40,000 STRV, compared with the previous year's estimate of 165,000 STRV, as the State's sole remaining sugar mill has announced its closure at the end of the calendar year. Texas production is projected to total 115,000 STRV, unchanged from the 2015/16 estimate.

For 2015/16, cane sugar production is estimated at 3.869 million STRV, a 75,000-STRV increase from the April projection. Florida, estimated at 2.166 million STRV, represents the entirety of the change. The increase for the State is predicated on processors' reports as they come to a conclusion in their harvest campaign, which was extended into May for the first time since 2008 due to wet weather in February that delayed the harvest. Louisiana, Hawaii, and Texas production estimates remain unchanged from the previous month's totals.

### ***U.S. Sugar Imports Projected To Increase in 2016/17 with More Supplies from Mexico***

In 2016/17, U.S. sugar imports are projected to total 3.479 million STRV, a 7.1-percent increase from the 2015/16 estimate. Imports under quota programs are projected to be 1.531 million STRV, a 5.6-percent decline from 2015/16. The WTO raw sugar TRQ was announced by USDA on May 5, and the current projection reflects that amount less a 99,000-STRV expected shortfall.

Imports for re-export are projected to total 175,000 STRV, a reduction from the current 2015/16 estimate of 300,000 STRV. The decline of these imports is primarily the result of changes made to the IMMEX sugar program in Mexico in February 2016 that no longer qualify U.S. sugar that is part of the re-export program. As a result of the Mexican program change, U.S. sugar exports are projected lower than in previous years, which means fewer re-export credits will be generated and available for imports under the program.

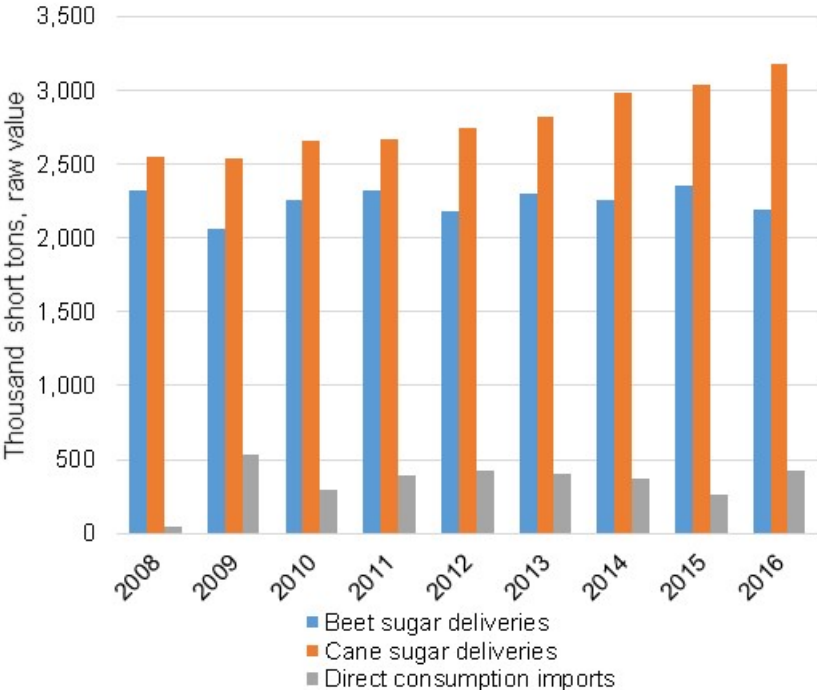
Imports from Mexico are projected to be 1.758 million STRV, which would be a 26.1-percent increase from the current 2015/16 estimate. The projection is based on the terms of the suspension agreement for the countervailing duty investigation against Mexico that was signed between the U.S. Department of Commerce (USDOC) and the Government of Mexico in December 2014.

U.S. sugar imports in 2015/16 are projected to total 3.231 million STRV, a 22,000-STRV increase from the previous month's figure. The increase is entirely accounted for by an increase in the specialty sugar quota that was announced by USDA on May 5, 2016. Imports from Mexico remain unchanged at 1.299 million STRV, as Mexico is projected to fill the entirety of the volume set by the Export Limit announced by the USDOC, as laid out by the countervailing duty investigation suspension agreement signed by the USDOC and the Government of Mexico

**Domestic Deliveries in 2015/16 Raised on Strong Pace through First Half of Year**

U.S. domestic sugar deliveries for 2015/16 are projected to be 12.000 million STRV, a 45,000-STRV increase from the previous month. Through March, fiscal year sugar deliveries for human consumption have totaled 5.789 million STRV, a 2.4-percent increase over the same period in 2014/15. This is primarily due to the 4.7-percent increase in cane sugar deliveries, which have more than offset the 6.9-percent decrease in beet sugar deliveries. Imports from non-reporters, also referred to as direct consumption imports, have also been strong through the first half of the year, reaching the highest total since 2008/09 and accounting for 7.3 percent of total deliveries.

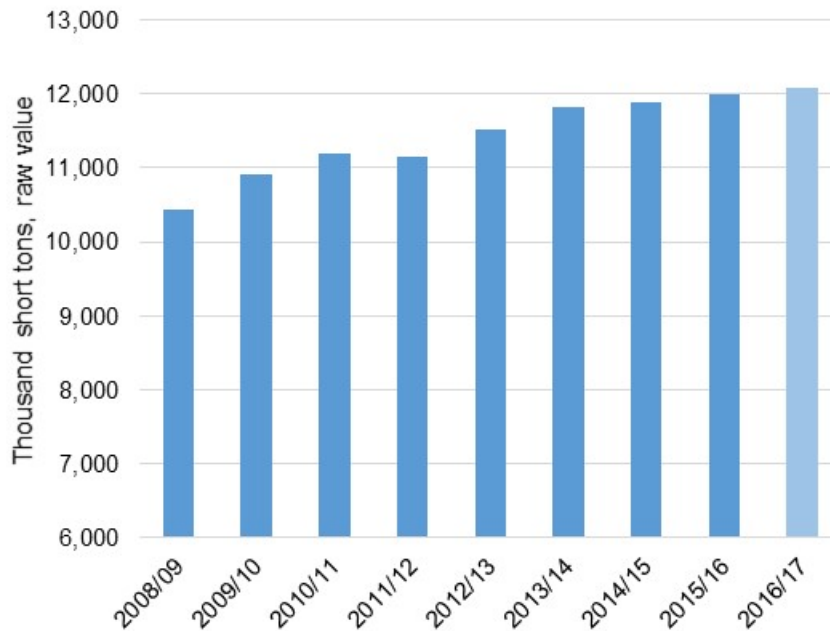
Figure 2  
**Sugar deliveries for human consumption, fiscal year, October through March, FY2008 to FY2016**



Source: Economic Research Service, USDA; Farm Service Agency, USDA.

Deliveries for human consumption are projected to total 12.080 million STRV, a 0.7-percent increase from the 2015/16 estimate. The increase follows trends for the caloric sweetener complex in recent years. Caloric sweetener consumption has remained relatively stable, even declining slightly on a per capita basis, although refined sugar has accounted for a larger share of total caloric sweeteners, primarily at the expense of corn sweeteners. This appears to be the primary factor driving sugar consumption trends.

Figure 3  
**Sugar deliveries for human consumption, fiscal year**



Source: Economic Research Service, USDA.

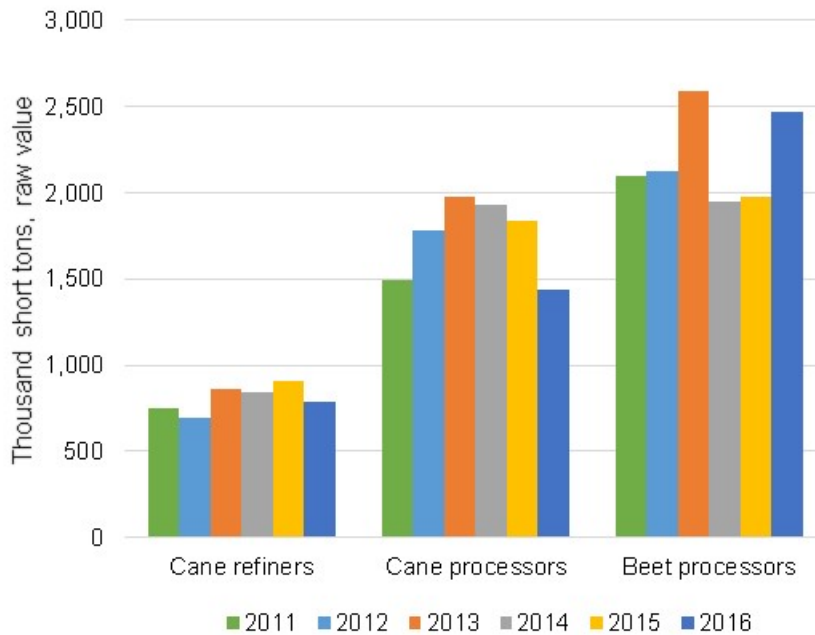
Deliveries for non-food uses in 2016/17 are projected to be 145,000 STRV, a 10,000-STRV increase from the current 2015/16 estimate. The increase is accounted for by higher projected deliveries for re-export products.

***Estimated Ending Stocks for 2015/16 Raised as Increase in Supplies Exceeds Higher Deliveries***

Ending stocks for 2015/16 are estimated to be 1.743 million STRV, a 124,000-STRV increase from the previous month's figure, as the increased estimate in production and imports outpaced the increase in deliveries. As a result, the estimated stocks-to-use ratio is 14.2 percent, compared with 13.3 percent projected in April.

Through the first half of the fiscal year, total sugar inventories are 4.699 million STRV, which is a decrease of 0.4 percent from the previous year. However, there are significant differences between the situation for cane sugar and beet sugar inventories. Beet processor inventories in March were 2.467 million STRV, which is 24.7 percent larger than at the same period in 2014/15. Total cane inventories were 2.232 million STRV, a decrease of 18.6 percent compared with the previous year. Cane processors' inventories have declined by 21.4 percent in 2015/16, as a strong pace of deliveries for cane sugar has exceeded the increase in domestic cane sugar production. Beet inventories have risen sharply after large production levels from the 2015/16 crop and a decline in the pace of deliveries for beet sugar through the first half of 2015/16.

Figure 4  
**Sugar inventories by industry segment, fiscal year, March 31**



Source: Economic Research Service, USDA; Farm Service Agency, USDA.

Ending stocks for 2016/17 are projected to be 1.657 million STRV, resulting in a 13.5-percent stocks-to-use ratio. This would represent a 5-percent decline from the 2015/16 estimate.

***Favorable Weather Conditions Raise Mexico Production in 2015/16***

Sugar production in Mexico is estimated to total 6.184 million metric tons, actual weight (MT) in 2015/16, a 199,000 MT increase from the April projection. The change reflects the updated crop estimate released by Mexico’s *Comité Nacional para el Desarrollo Sustentable de la Caña de Azúcar* (Conadesuca). The updated estimates show less area harvested than in the initial estimates but higher sugarcane yields and sugarcane production.

Table 3 -- Mexico sugar supply and use, 2014/15 - 2015/16 and projected 2016/17, May 2016

Items	2014/15	2015/16 (estimate)	2016/17 (forecast)
	1,000 metric tons, actual weight		
Beginning stocks	831	811	1,358
Production	5,985	6,184	6,100
Imports	128	70	10
Imports for consumption	8	10	10
Imports for sugar-containing product exports (IMMEX) 1/	121	60	0
Total supply	6,944	7,065	7,468
Disappearance			
Human consumption	4,408	4,331	4,398
For sugar-containing product exports (IMMEX)	337	255	255
Statistical adjustment	-54		
Total	4,691	4,586	4,652
Exports	1,442	1,121	1,515
Exports to the United States & Puerto Rico	1,311	1,111	1,505
Exports to other countries	131	10	10
Total use	6,134	5,707	6,167
Ending stocks	811	1,358	1,301
	1,000 metric tons, raw value		
Beginning stocks	881	859	1,439
Production	6,344	6,555	6,466
Imports	136	74	11
Imports for consumption	8	11	11
Imports for sugar-containing product exports (IMMEX)	128	64	0
Total supply	7,361	7,489	7,916
Disappearance			
Human consumption	4,673	4,591	4,661
For sugar-containing product exports (IMMEX)	357	270	270
Statistical adjustment	-57	0	0
Total	4,973	4,861	4,931
Exports	1,529	1,189	1,606
Exports to the United States & Puerto Rico	1,389	1,178	1,595
Exports to other countries	139	11	11
Total use	6,502	6,050	6,537
Ending stocks	859	1,439	1,379
Stocks-to-human consumption (percent)	18.4	31.3	29.6
Stocks-to-use (percent)	13.2	23.8	21.1
High fructose corn syrup (HFCS) consumption (dry weight)	1,444	1,474	1,474

1/ IMMEX = Industria Manufacturera, Maquiladora y de Servicios de Exportación.

Source: USDA, *World Agricultural Supply and Demand Estimates* and Economic Research Service, *Sugar and Sweeteners Outlook*; Conadesuca.

Table 4: Conadesuca sugar production estimates for 2015/16 sugar

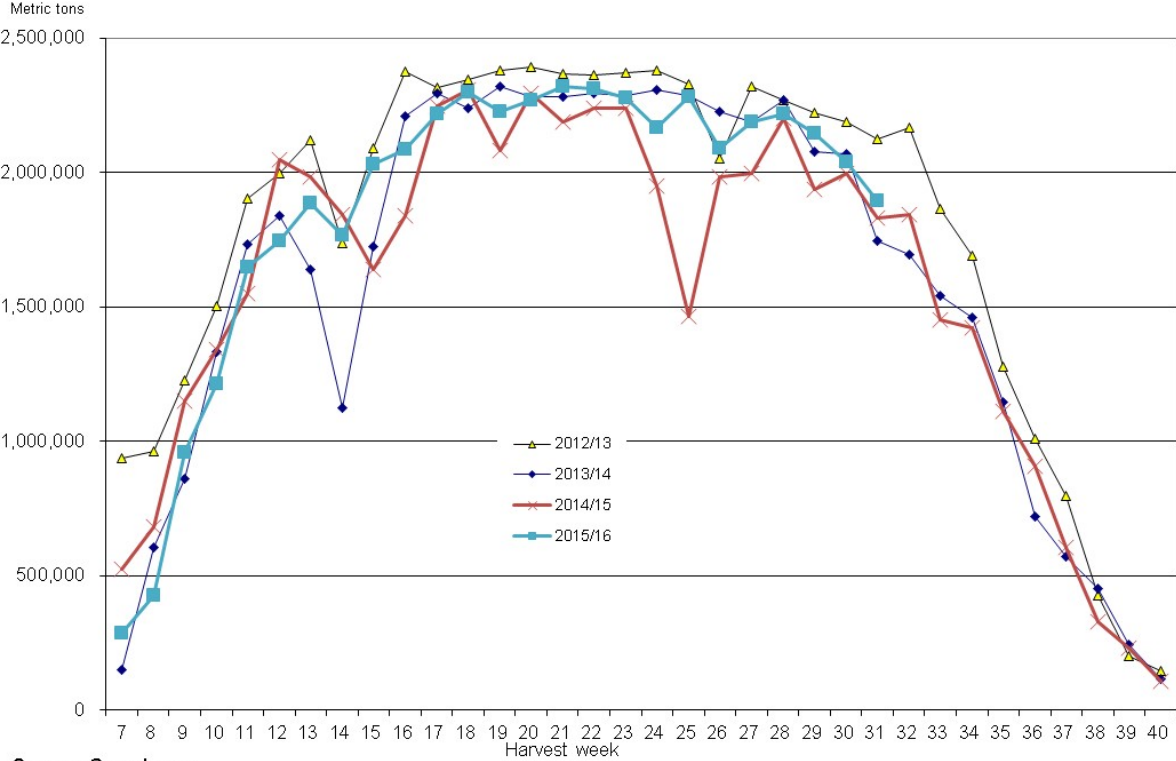
	First Estimate	April Estimate
Harvested cane area (ha)	801,745	790,281
Cane harvested (MT)	54,275,824	55,714,811
Cane yield (MT/ha)	67.70	70.50
Recovery rate (percent)	11.16%	11.10%
Sugar production	6,056,025	6,184,344

Source: Conadesuca.



Through April 30, Mexico has harvested 642,000 hectares of sugarcane, a 0.3-percent decline from the previous year. Area harvested remains behind the previous year, despite strong storms in the State of Veracruz, Mexico’s leading producing State, during winter and early spring. Cumulative yields, however, have been 3.0-percent higher than in 2014/15. Cumulative recovery rates through the 31st harvest week were 11.19 percent, slightly behind the previous year’s rate of 11.21 percent, and remain on track with recent years’ trajectories.

Figure 5  
**Mexican sugarcane production, by week of harvest, 2012/13-2015/16**



Source: Conadesuca.

Figure 5  
**Cumulative Mexican sugarcane yield in metric tons (mt) per hectare (ha) during harvest season**

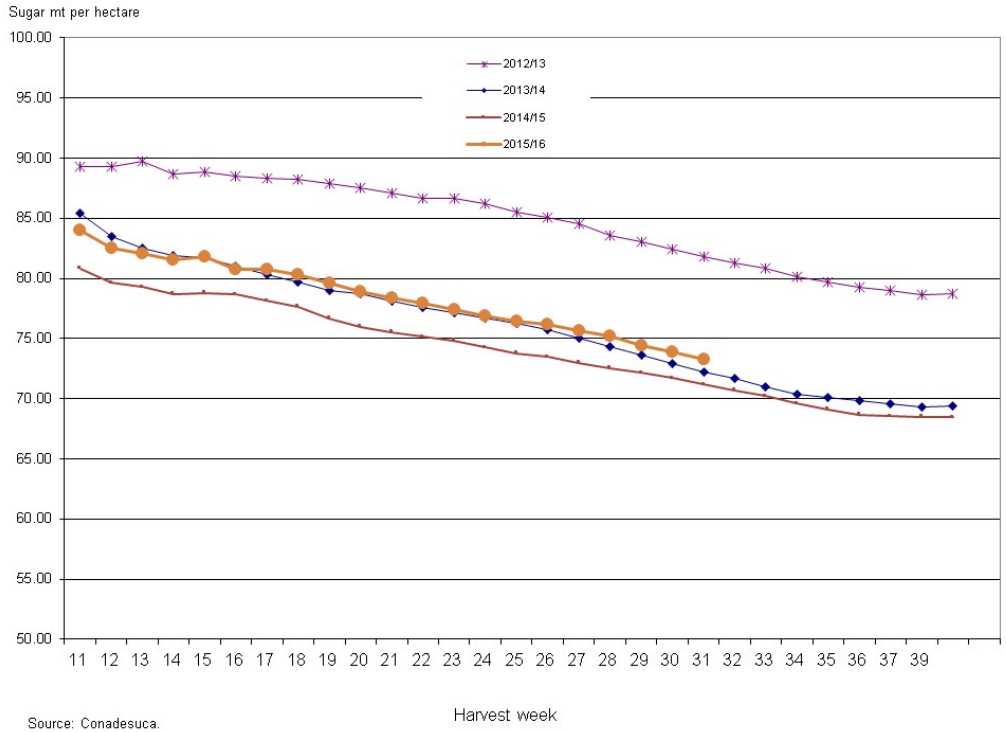
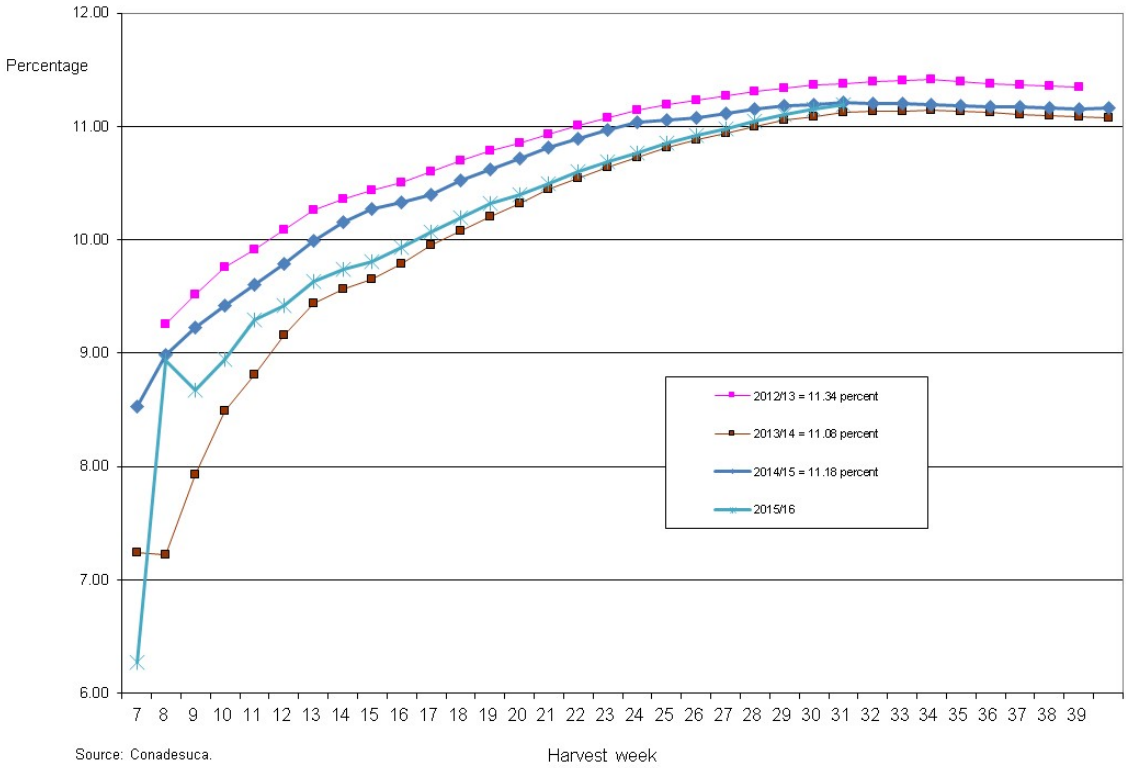
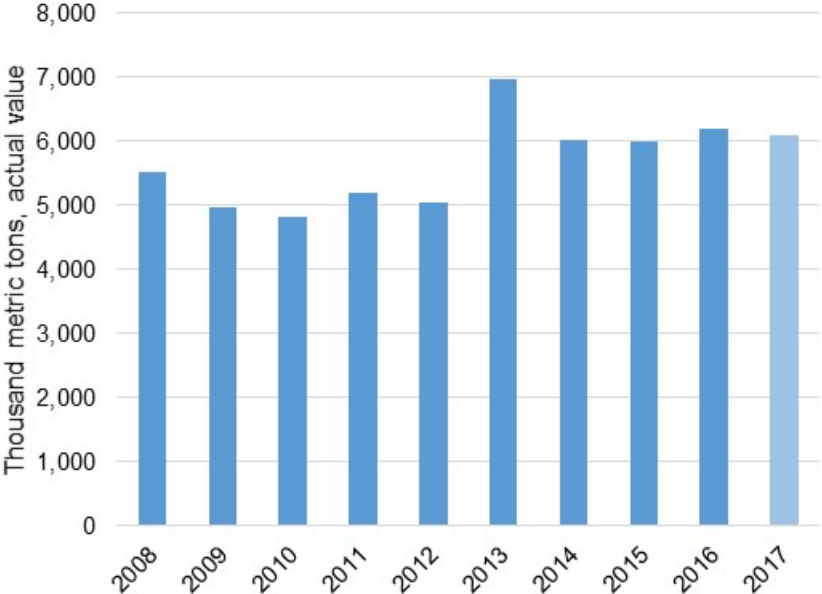


Figure 6  
**Intra-seasonal, cumulative sugar recovery rates in Mexico, recent crop years**



Mexico’s Sugar production in 2016/17 is projected to be 6.100 million MT, a 1.4-percent decline from the 2015/16 estimate. The projection is based on a return to trend yields and recovery rates. No official estimates or data have been released yet for the 2016/17 crop by Conadesuca or the Government of Mexico. Conadesuca typically releases its first estimate for the upcoming crop in the fall.

Figure 7  
**Mexico sugar production, fiscal year, FY2008 to FY2017**



Source: Economic Research Service, USDA.

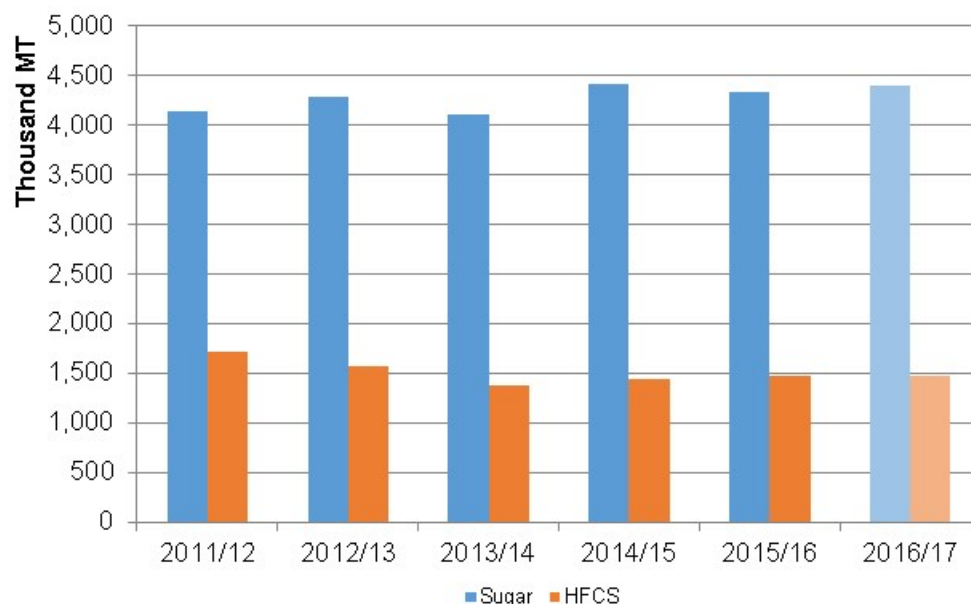
Mexican imports for 2016/17 are projected to be 10,000 STRV, 60,000 MT less than the current 2015/16 estimate. All projected imports for 2015/16 are for human consumption, with no imports for the IMMEX program. Changes in the program that went into effect in February 2016 made imported sugar from the United States that is from the U.S. re-export program ineligible for IMMEX benefits. As a result, sugar in the IMMEX is projected to come primarily from domestic Mexican supplies.

***Projected Mexican Domestic Deliveries for 2015/16 Reduced***

Mexico deliveries for domestic users in 2015/16 is estimated at 4.586 million MT, a 70,000-MT decrease from the previous month. Deliveries for domestic consumption are estimated at 4.331 million MT, a 12,000-MT increase from the previous month’s projection, which matches the updated April forecast released by Conadesuca. Likewise, deliveries for IMMEX are reduced 82,000 MT to 255,000 MT, also matching the updated Conadesuca forecast. The reduction in the expected deliveries for IMMEX implies that program changes disqualifying U.S. sugar that benefits from the U.S. re-export program will reduce the total size of the program for sugar, rather than domestic sugar substituting for imported sugar.

Deliveries for domestic users in 2016/17 are projected to be 4.652 million MT, a 1.4-percent increase from the 2015/16 estimate. Deliveries for domestic consumption are projected to total 4.398 million MT, a 1.5-percent increase from the previous year. Projected high-fructose corn syrup deliveries are equal to the previous year’s estimate of 1.478 million MT. Total per capita sweetener consumption is projected to remain constant, which means that increased consumption due to population growth will be captured by higher sugar deliveries. Deliveries to the IMMEX are projected to remain unchanged from 2015/16 at 255,000 MT.

Figure 8:  
**Mexican sweetener consumption October to September, fiscal year**



Source: Conadesuca.

***Mexican Sugar Exports Projected To Increase in 2016/17 with Increased Shipments to the United States***

Mexican sugar exports in 2016/17 are projected to total 1.515 million MT, of which 1.505 million MT are projected to be shipped to the United States, a 35.1-percent and 35.4-percent increase, respectively, from the previous year's estimated levels. The increase in shipments to the United States is due to the projected Export Limit increase, with lower projected beginning stocks, production, and imports from quota programs, as well as slightly larger projected total use.

Exports to other countries in 2016/17 are projected to remain unchanged from the previous-year estimate at 10,000 MT. Although world prices have increased and domestic prices in Mexico have been relatively stable over the past few months, Mexico does not appear to be in a competitive position in the world market compared to other exporting countries, Brazil in particular. This is expected to result in few export opportunities other than the United States for Mexican mills.

Ending stocks in 2016/17 are projected to total 1.301 million MT, compared with the 2015/16 estimate of 1.358 million MT. As a result, the stocks-to-consumption ratio in 2016/17 is projected to be 29.6 percent, is large by historical standards but below the 2015/16 estimate of 31.4 percent.

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