



# Wheat Outlook

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## Ending Stocks Nearly Unchanged From Previous Report As Higher Domestic Use Offset Higher Production

Projected U.S. wheat supplies for 2013/14 are raised 26 million bushels with higher estimated production and an increase in expected imports. Production was raised 14 million bushels in the September 30 *Small Grains* report. Production is further raised 2 million bushels for hard red spring (HRS) wheat and slightly for durum, based on the resurvey of North Dakota and Montana producers who had not finished harvesting when the September survey was completed for *Small Grains*. Imports are projected 10 million bushels higher with larger supplies in Canada and stronger food use expected for HRS wheat. Food use for all wheat, however, is lowered 8 million bushels reflecting the latest flour production data reported by the North American Millers' Association. Feed and residual use is projected 30 million bushels higher based on indicated June-August disappearance from the September 1 stocks. Projected ending stocks are raised 4 million bushels.

The projected range for the 2013/14 season-average wheat farm price is narrowed 20 cents on each end to \$6.70 to \$7.30 per bushel. The midpoint of the range is unchanged from September at \$7.00 per bushel.

The global wheat production forecast is lowered 2.5 million tons, with deteriorating prospects for Russia, Kazakhstan, and Argentina that are partly offset by the record-high Canadian crop. Foreign wheat feed use is projected lower, while ending stocks increase. Global wheat trade is almost unchanged, but the shifts in competitiveness affect expected exports by country. The projection for U.S. wheat exports is unchanged this month.

Wheat Chart  
Gallery will be  
updated on  
Nov. 13, 2013

The next release is  
Dec. 12, 2013

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Approved by the  
World Agricultural  
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## Domestic Outlook

### *Winter Wheat Areas and Production Are Updated With Small Grains 2013 Summary*

**Hard red winter** (HRW) production is estimated at 744 million bushels, down 47 million bushels from the previous forecast and down 256 million bushels from a year ago. Production is down from 2012 due partially to the lower planted area for the 2013 crop, and both a higher abandonment rate and a lower yield because of severe drought and spring freeze damage. The HRW yield is estimated at 36.8 bushels per acre, down 2.1 bushels from the previous forecast and down from last year's 40.7 bushels. Harvested area is 20.2 million acres, down 0.1 million from the previous forecast and down 4.4 million from 2012. The harvest-to-planted ratio for 2013 is .684 compared to .826 for 2012.

**Soft red winter** (SRW) production is estimated at 565 million bushels, up 23 million bushels from the previous forecast and up 145 million bushels from last year. SRW production is higher than 2012 because of larger harvested area and higher yield. The SRW yield is 63.7 bushels per acre, up 1.6 bushels from the previous forecast and up from last year's 60.3 bushels. Harvested area is 8.9 million acres, up 0.2 million from the previous forecast and up 1.9 million from 2012.

**White winter wheat** production for 2013 is estimated to total 225 million bushels, up 16 million from the previous forecast and up 4 million from 2012. The planted and harvested areas, production, and yield for white winter wheat are as follows (hard white winter = HWW and soft white winter = SWW):

2013	HWW	SWW
Planted area (million acres)	0.37	3.13
Harvested area (million acres)	0.28	3.03
Yield (bushels/acre)	39.4	70.7
Production (million bushels)	11.2	214.2

2012	HWW	SWW
Planted area (million acres)	0.34	3.01
Harvested area (million acres)	0.29	2.91
Yield (bushels/acre)	46.1	71.6
Production (million bushels)	13.2	208.3

### *Spring Wheat Areas and Production Are Updated With Small Grains 2013 Summary and a Resurvey of North Dakota and Montana*

**Hard red spring** (HRS) production is estimated at 490 million bushels, up 15 million bushels from the August forecast, but 15 million bushels below 2012. The yield is higher than in 2012, but the harvested area is down. HRS yield is 45.8 bushels per acre, up 4.1 bushels from the August forecast and up from last year's 44.0 bushels. Harvested area is 10.7 million acres, down 0.7 million from the August forecast and down 0.8 million from 2012.

**White spring** production is estimated to total 43.1 million bushels, up 6.6 from the previous forecast and up 5.7 million from 2012. The planted and harvested areas, production, and yield for white spring wheat are as follows (hard white spring = HWS and soft white spring = SWS):

2013	HWS	SWS
Planted area (million acres)	0.15	0.51
Harvested area (million acres)	0.14	0.50
Yield (bushels/acre)	74.5	65.9
Production (million bushels)	10.5	32.6

2012`	HWS	SWS
Planted area (million acres)	0.12	0.48
Harvested area (million acres)	0.11	0.46
Yield (bushels/acre)	74.3	62.7
Production (million bushels)	8.5	29.0

**Durum** wheat production is estimated at 61.9 million bushels, up 1.7 million from the previous forecast, but down 20.9 million from a year ago. Durum production is estimated lower compared to 2012 because of lower area. Harvested area is 1.42 million acres, down 0.08 million acres from the August forecast and down 0.71 million acres from 2012. Durum yield for 2013/14 is estimated at 43.6 bushels per acre, up 3.5 bushels from the previous forecast and higher than last year's 38.8 bushels per acre.

### ***2012/13 and 2011/12 Changes***

There are some relatively minor area and production updates for HRW, HWW, and durum for 2012 this month, which result in minor seed use changes for 2012/13 and 2011/12.

### ***Projected 2013/14 Supplies Raised 26 Million Bushels This Month***

Projected 2013/14 supplies are raised 26 million bushels this month. Production is up 16 million bushels to 2,130 million bushels. Imports are raised to 10 million bushels to 150 million bushels with expected higher hard red spring (HRS) and durum imports from Canada, up 8 million bushels and 2 million bushels, respectively.

### ***Projected 2013/14 Supplies Down From 2012/13***

Total U.S. wheat supply for 2013/14 is down 133 million bushels from 2012/13 to 2,998 million bushels. Supplies of HRW and durum are down year to year, while supplies are up for the other classes. HRW supplies decreased the most, as smaller production and imports more than offset higher beginning stocks. Durum supply also decreased sharply percentagewise as smaller production and beginning stocks more than offset higher expected imports. SRW supplies were up the most year to year as higher production more than offset lower beginning stocks.

### ***Projected Total 2013/14 Utilization Raised This Month***

Projected 2013/14 total U.S. wheat use is raised from September. Exports, at 1,100 million bushels, are unchanged, but domestic use is raised 22 million bushels to 1,333 million bushels. A 30-million-bushel increase in feed and residual use is partially offset by an 8-million-bushel decrease in food use. The increased feed and residual use is based on the latest NASS Grain Stocks report. The decreased food use is based on a milling report from the North American Millers' Association.

The class changes for projected feed and residual use from September are: HRW, -20 million bushels; HRS, +5 million bushels; SRW, +30 million bushels; and white, +15 million bushels.

The by-class food use changes HRW is projected 24 million bushels lower than in September while HRS use is raised 16 million bushels. These class changes are driven by expected substitution of HRS for HRW in blends for some products.

### ***Projected 2013/14 Use Is Up Slightly From 2012/13***

Projected total use for 2013/14 is 2,433 million bushels, up 19 million bushels from 2012/13. Domestic use is expected to be down 73 million bushels from 2012/13 while exports are projected up 93 million bushels. Domestic use is down because feed and residual use is expected to fall 78 million bushels from 2012/13 to 310 million bushels. While feed use is expected to be high during the summer quarter of 2013/14, such use is then expected to decrease sharply with the fall corn harvest and lower expected corn prices. Total food use is expected higher with population growth and expected lower flour extraction than in 2012/13.

### ***Projected 2013/14 Ending Stocks Up From September, Down From 2012/13***

The projected 2013/14 U.S. wheat ending stocks are raised 4 million bushels from September to 565 million bushels. Total ending stocks for 2013/14 are expected to decrease by 21 percent from 2012/13. Stocks of HRW, SRW, and white are expected down 44 percent, 28 percent, and 7 percent, respectively. Stocks of durum and HRS are expected up 34 percent and 17 percent, respectively.

### ***2013/14 Price Range Projection***

The 2013/14 season-average farm price range is projected at \$6.70 to \$7.30 per bushel, narrowed from \$6.50 to \$7.50 per bushel in September. The 2013/14 range is down from the record \$7.77 per bushel reported for 2012/13.

### ***2013 Wheat Qualities Compared With 2012 and 5-Year Averages***

The U.S. Wheat Associates' 2013 Crop Quality Report provides the following data for the 2013 crop. Go to <http://www.uswheat.org/reports/cropQuality/> to access the full report.

### **U.S. wheat crop, 2013, 2012, and 5-year average**

2013 wheat crop	Protein (Percent)	Flour/semolina extraction (Percent)	Test weight (Pounds/bushel)	Wheat falling numbers (Seconds)
Hard red winter	13.4	76.1	59.5	421
Hard red spring	13.6	69.5	62.5	401
Soft red winter	9.9	70.2	58.4	294
Soft white	10.3	75.9	61.1	349
Great Plains durum	12.8	65.2	60.7	375
2012 wheat crop				
Hard red winter	12.6	75.2	61.1	409
Hard red spring	14.7	68.9	61.3	418
Soft red winter	9.9	73.4	60.2	329
Soft white	9.8	75.7	61.0	320
Great Plains durum	14.6	63.4	60.6	412
5-year average				
Hard red winter	12.2	72.2	60.8	414
Hard red spring	14.1	69.1	61.1	385
Soft red winter	10.0	70.1	58.7	328
Soft white	10.0	72.2	60.0	322
Great Plains durum	14.0	64.2	60.4	368

Source: U.S. Wheat Associates.

### ***Winter Wheat Conditions Are Favorable***

Winter wheat conditions as of November 3 in *Crop Progress* by NASS are more favorable compared to last year at this time. For all winter wheat, only 6 percent was rated poor to very poor while 63 percent was rated good to excellent. A year ago at this time, 19 percent was rated poor to very poor and 39 percent was rated good to excellent. In all the States, except Texas, the percent of the crop rated poor to very poor was 5 percent or less. In Texas, 20 percent of crop was rated poor to very poor.

### ***USDA Wheat Baseline, 2013-22***

Each year, USDA updates its 10-year projections of supply and utilization for major field crops grown in the United States, including wheat. A detailed discussion summarizing the historical forces determining U.S. wheat supply and utilization, along with the analysis underlying the wheat projections for 2013-22, is available at <http://www.ers.usda.gov/topics/crops/wheat/usda-wheat-baseline,-2013-22.aspx>.

## International Outlook 5

### *Wheat Production Reduced in Both Hemispheres*

Global wheat production in 2012/13 is projected to reach 706.4 million tons, down 2.5 million tons this month, while foreign production is down by 2.9 million tons.

Two months have passed since our last report in September, after the October report was cancelled because of the Federal Government shutdown. Here is a brief overview of this past two months' (September and October) wheat crop developments in the major wheat-producing regions and countries of the world.

During September-October in most of the Northern Hemisphere countries, wheat harvesting was progressing and winter wheat planting was underway. European Union (EU) countries and Ukraine finished wheat harvesting in September, Canada in October, and in Russia and Kazakhstan an unusually delayed wheat harvest is still being completed. September and October are also the months of winter wheat planting in Europe (EU, European Russia, and Ukraine), as well as in East and South Asia (China, India, and Pakistan), North Africa, and the Middle East.

The largest production change in the Northern Hemisphere (and in the world) this month is a 2.5-million-ton cut in projected wheat production in Russia to 51.5 million. This partly reflects a 0.5-million-hectare reduction in Russian wheat area. This year, a cold and wet spring delayed wheat planting in the Urals and Siberia and pushed the wheat harvest substantially back, increasing the odds of larger abandoned area.

Abnormally cold and/or excessively wet weather during September and the first half of October slowed down, and in some cases completely stalled, wheat harvest progress in parts of European Russia (Volga), in the Urals, and in Siberia. Russian meteorological records indicate that September of 2013 in the Central Belt of Russia that runs across the Central and Volga Districts had the highest precipitation level since 1885.

According to the Russian Statistical office, about 1.1 million hectares, or 4.4 percent of the area planted for wheat, has been categorized as damaged and not subject to harvesting. In the Volga District, Urals, and in the Southern District, wheat area was written off partly because of winterkill, but also because of excessive moisture that damaged fields. Less than 94 percent of the adjusted area was harvested in the Volga District (83 percent of planted), and less than 96 percent in the Urals (86 percent of planted). Daily reports suggest that the wheat harvest effectively has come to a halt, though some additional wheat is still expected to be harvested. Harvesting has been proceeding extremely slowly during the last few weeks of seemingly favorable unseasonably warm weather because of frequent on-and-off light showers. Although the weather forecast is favorable with no frosts or snow in the near future, harvesting in November in the Urals and Siberia faces exceedingly elevated risks.

In neighboring Kazakhstan, wheat production is also projected down 1.5 million tons to 15.5 million this month. Excessive wetness in the northern part of the country delayed harvesting and affected wheat yields that were previously projected

at the second-highest level on record. According to reports, harvesting is progressing very slowly, and similarly in Siberia.

Partly offsetting, is a projected increase in the Western Hemisphere, specifically in Canadian wheat output, up 1.7 million tons to 33.2 million. This is an absolute record for both wheat yield and production. Note that the latest official estimate by Statistics Canada of 33.0 million tons does not include the Maritime Provinces and British Columbia, which combined account for around 0.2 million tons of mainly winter wheat. Canadian farmers were just about finished harvesting in the third week of October. Despite delayed wheat planting in Western Canada (Saskatchewan, Manitoba, and Alberta) in spring, most of the wheat was in the ground by mid-June, and from then on growing conditions were exceptionally favorable for crop development, and have materialized in the record wheat crop.

In the European Union, further refining of the wheat harvest data resulted in an increase of 0.4 million tons to 143.3 million with small increases (listed in a descending order) in the Czech Republic, Germany, Hungary, Austria, Bulgaria, Greece, France, and Portugal, and a decline in Denmark.

In the Southern Hemisphere, for two major wheat producers—Argentina and Australia—September and October were critical months for wheat development. During these months both temperature and moisture are crucial, as wheat is advancing from its vegetative stage through heading and filling to maturity. The wheat harvest in these countries is still to come, commencing in November in Australia and in December in Argentina. In Brazil—a much smaller Southern Hemisphere wheat producer—harvesting started in October and will be moving from north to south through December. Australia fared pretty well throughout these vital 2 months. This year, wheat growth conditions were strongly polarized in Australia, and virtually no wheat areas received an average level of moisture. Western Australia (WA) had almost ideal weather for wheat development, with soaking rains and warm temperatures, and South Australia (SA) and Victoria (VC) also had above-normal rainfall throughout the reproductive and filling periods. As a result, all three States maintain excellent crop prospects. At the same time, New South Wales (NSW) and Queensland (QLD) went through persistent heat and dryness during the period of maturation, and wheat yields in those States, especially in the area surrounding the border, are expected at a lower than average level. Excellent conditions in the west and south of the continent are expected to compensate for the projected losses in the east; consequently no changes to Australian wheat output are made this month.

In Argentina, wheat production is reduced for the 2013/14 marketing year, down 1.0 million tons to 11.0 million. Though the major wheat area of southern Buenos Aires province enjoyed beneficial weather with good rains in October, wheat fields in the northern provinces of the country—Cordoba, Santa Fe, Entre Rios, as well as a number of smaller provinces—suffered from excessive dryness and cold weather, and had several episodes of frosts. These adverse developments reduced prospects for the total wheat harvested area, down 0.2 million hectares to 3.7 million. Wheat production in Argentina for 2012/13 is also down 0.5 million tons to 9.5 million this month. The decline reflects mounting evidence of low wheat supplies in the country with skyrocketing domestic prices that are making further wheat exports not economically viable, at least before the new harvest will add to the supplies. No changes are made for Brazil this month.

Largely offsetting 2013/14 production changes are made for a number of countries based on final statistical and harvest reports, the largest among these are made for

Uzbekistan, up 0.1 million tons, for Sudan, down 0.1 million tons, as well as smaller changes for Bangladesh, South Korea, Lesotho, Mexico, Mongolia, and Zambia.

### ***Larger Beginning Stocks Partly Offset Production Decline***

The decline in global supplies caused by lower production prospects this month is partly offset by a 1.7-million-ton increase in 2013/14 world wheat beginning stocks. Higher beginning stocks are projected in the European Union, up 1.0 million tons, in Korea and Uzbekistan, up 0.3 million tons each, and in Japan, up 0.1 million tons. These increases are correlated with the lower projected wheat use in 2012/13 in these countries, making wheat use more in line with wheat availability, livestock developments, and industrial use. Beginning stocks are down 0.2 million tons in Argentina, partly reflecting its lower production estimate for 2012/13. Smaller offsetting changes for wheat beginning stocks are made for a number of countries.

### ***Wheat Use Reduced, Ending Stocks Up***

Foreign wheat consumption for 2013/14 is projected 3.6 million tons lower this month to 667.2 million tons. Foreign wheat feed and residual use is down 2.4 million tons to 130.8 million. Wheat feed use is projected down 1.0 million tons to 13.5 million in Russia following the wheat production decline, but is still 1.6 million tons above the previous year. The poultry and hog sectors in Russia are expected to maintain their rapid development, and projected total grain feed use in Russia is essentially the same as last month. Corn feeding is projected to increase with exceptionally high supplies from the record-large harvest, and is expected to offset the decline in wheat and also in barley feed use. EU-27 wheat feed use projected for 2013/14 is reduced 0.7 million tons this month, which is still 4 percent higher than last year. The decline is offset by an increase in forecast rye and oats feeding, production of which are expected to be higher. Wheat feeding is projected down 1.0 million tons in China with a reduction in its wheat imports projection. Partly offsetting those changes, wheat feeding is up in South Korea, Uzbekistan, and New Zealand.

World wheat 2013/14 ending stocks are projected up 2.2 million tons this month, to 178.5 million, with lower projected use more than offsetting reduced supplies of wheat. Lower wheat use gave a boost to stocks in the EU, up 0.9 million tons to 12.1 million. With the record wheat output, Canada is expected to hold increased stocks, up 0.7 million tons. Stocks are also projected up in Argentina, despite reduced production. It is expected that the Government of Argentina will opt to maintain a higher stocks level, up 0.4 million tons, to mitigate the risk of soaring domestic food prices in the coming year. Smaller adjustments to wheat ending stocks are made for a number of countries.



## ***Wheat Trade Almost Unchanged, Though Sizeable Shifts Expected Among Exporters***

World wheat trade for the international 2013/14 July-June trade year is projected to be nearly unchanged from last month, down just 0.3 million tons, at 152.1 million. All changes in world trade this month indicate shifts among importers and exporters reflecting wheat availability, logistics, policies, and recent sales. China's imports are projected 1.0 million tons lower to 8.5 million, reflecting an abrupt decline in the pace of its wheat purchases in the past 2 months. Wheat imports in the EU-27 are down 0.5 million tons, as the pace of import licenses is particularly slow. The region is switching partly to corn imports (into Spain and Italy, the major European importers of feed grain), as cheap supplies of corn from record harvests in Russia and Ukraine and large crops in Romania and Bulgaria, are becoming available at a time when wheat in those countries is in shorter supply. Wheat imports are also projected down 0.2 million tons for the Philippines, as its accumulated purchases have been lower than expected. A small downward adjustment in wheat imports is made for Venezuela. Those declines are almost fully offset by the multiple increases in wheat imports for many countries, resulting mainly from revising the supply and demand balances in line with the 2012/13 trade adjustments. The largest increase is for Algeria, up 0.5 million tons (and up 0.2 million tons for 2012/13); for Libya, up 0.3 million tons in both 2013/14 and 2012/13. Smaller increases in wheat imports are made for more than a dozen countries.

The 2013/14 U.S. wheat import projection for the July-June international trade year is increased 0.3 million tons this month to 4.0 million. Wheat imports from Canada have been stronger than previously expected. Given Canada's record crop, and the absence of the Canadian Wheat Board that had regulated export activity, the increase is expected to be supported by continued offers of attractively priced Canadian wheat to U.S. millers. However, actual trade over the border with Canada might not be accounted for with complete accuracy. For example, some Canadian wheat exported from U.S. ports may show up as U.S. imports instead of trans-shipments.

This month's changes in 2013/14 wheat export projections are largely offsetting. Exports by Russia are down 1.0 million tons to a still lofty 16.0 million. Despite a production cut of 2.5 million tons, a reduction in expected exports is smaller, as the major wheat-exporting regions of the country (South and North Caucasus) appear to have harvested a higher than average amount of wheat. The major cuts in Russian wheat output come from the regions further from ports, and the lower wheat surplus in those localities is not expected to strongly affect the country's exports. This month's reduction in wheat exports for Russia results mainly from the lower estimate of wheat output in the Volga and partly in the Central districts (rather than from the Urals and Siberia). Lower Russian wheat exports are fully offset by an increase in the EU exports, up 1.0 million tons. The EU is naturally expected to benefit from the lower Russian wheat crop. The eastern countries of the block (especially Bulgaria and Romania) are already picking up parts of the Russian business, which explains the soaring volume of the EU wheat export licenses.

Wheat exports are projected lower in Kazakhstan, down 1.0 million tons to 8.0 million, based on the lower crop estimate. An offsetting change in wheat exports is

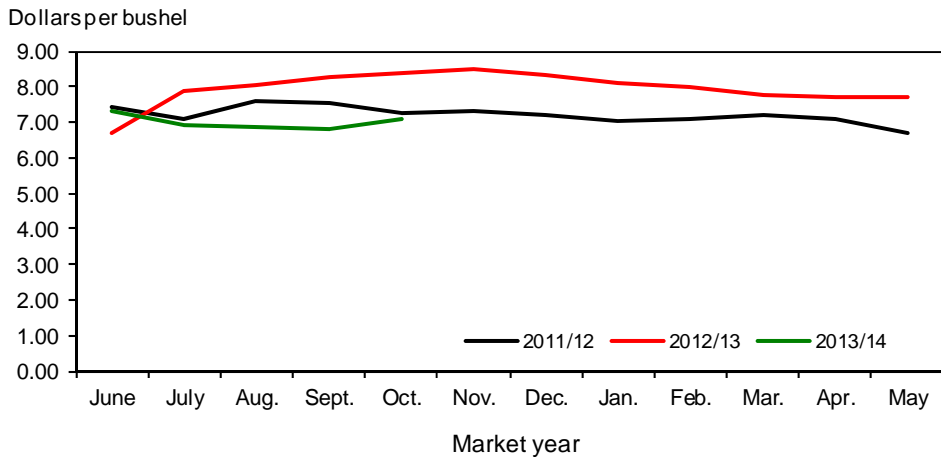
made for India, up 1.0 million tons to 6.0 million. This reflects a change in the government policy that lowered the minimum export price of wheat to \$260/ton from \$300/ton at the end of October. The Government is trying to make Indian wheat more competitive and at least partly unload some of the country's bulging wheat stocks.

In the Western Hemisphere, a big reduction is made in wheat exports for Argentina, down 1.5 million tons to just 3.5 million, though the country's wheat output is reduced by 1.0 million tons only. It is expected that, in an attempt to moderate the skyrocketing domestic food prices, the Government will be cautious in its wheat export policy, and will strive to increase Argentine wheat stocks rather than allowing additional exports. Partly offsetting is an increase in wheat exports in Canada, up 1.0 million tons to 21.5 million. Canada has a record wheat crop, as well as improved export opportunities in the United States, South America, Asia, and North Africa. The country also has a record canola (rapeseed) crop, with good export potential. However, the Canadian transport (railways) and logistical system for exporting these crops is constrained, and faces difficulties handling high export levels for both crops. Consequently, a higher figure could be justified for Canadian wheat exports if the logistics were less constraining.

Wheat exports are also projected up for a total of 0.2 million tons for Uzbekistan (higher crop), Georgia, and Nigeria.

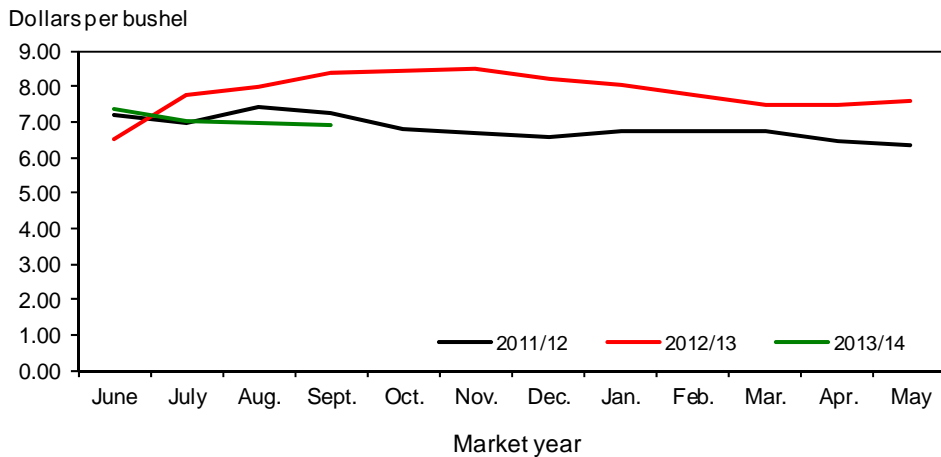
For the United States, the export projection for the 2013/14 wheat international trade year (July-June) remains unchanged this month at 30 million tons, up 8 percent compared to a year ago. Census data for July through August 2013 (September 2013 Census data are delayed because of the government shutdown), inspections for September and October, and outstanding sales as of October 31 indicate that total commitments have reached 19.0 million tons, up from 13.0 million tons last year. Despite a strong start, U.S. wheat exports are expected to substantially slow down, a development that in fact is already being observed in weekly sales.

Figure 1  
**All wheat average prices received by farmers**



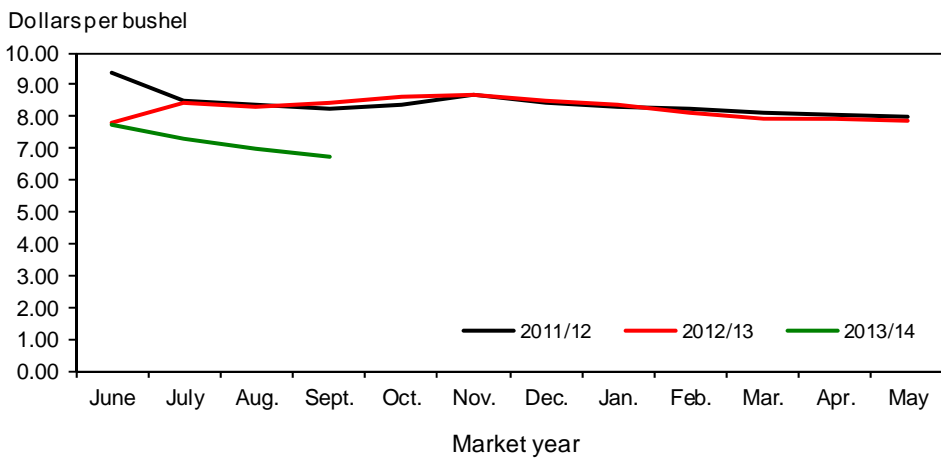
Source: USDA, National Agricultural Statistics Service, *Agricultural Prices*.

Figure 2  
**Hard red winter wheat average prices received by farmers**



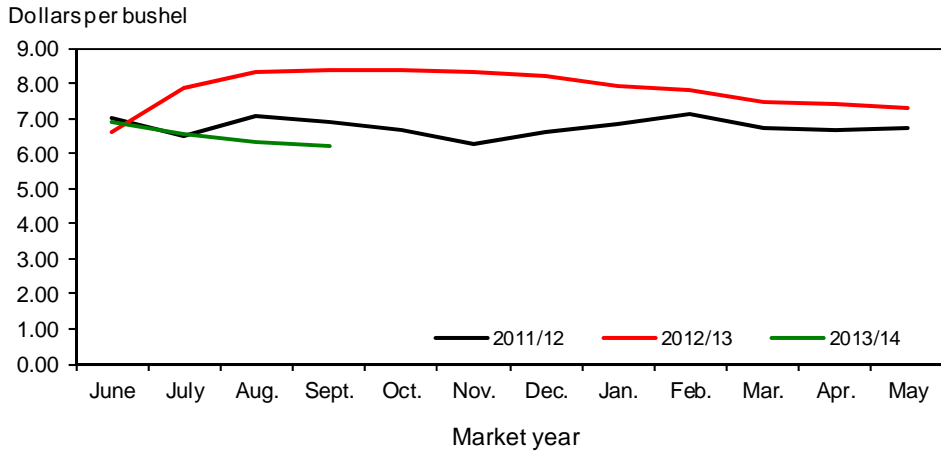
Source: USDA, National Agricultural Statistics Service, *Agricultural Prices*.

Figure 3  
**Hard red spring wheat average prices received by farmers**



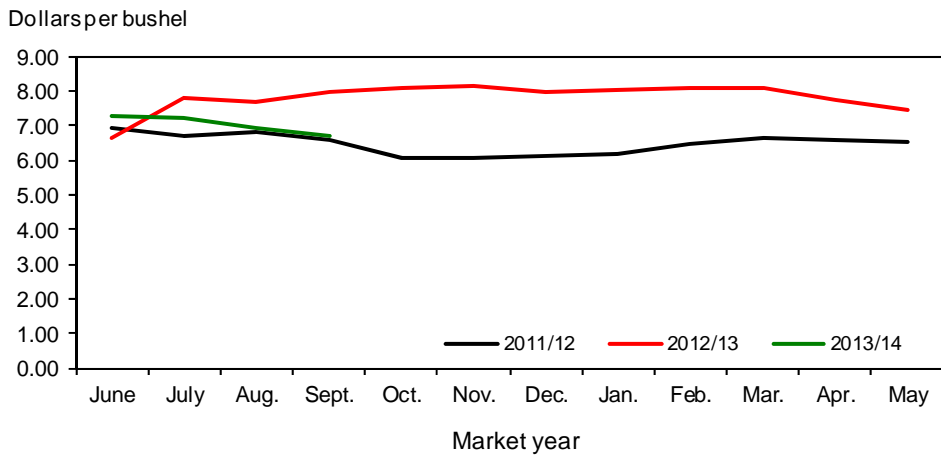
Source: USDA, National Agricultural Statistics Service, *Agricultural Prices*.

Figure 4  
**Soft red winter wheat average prices received by farmers**



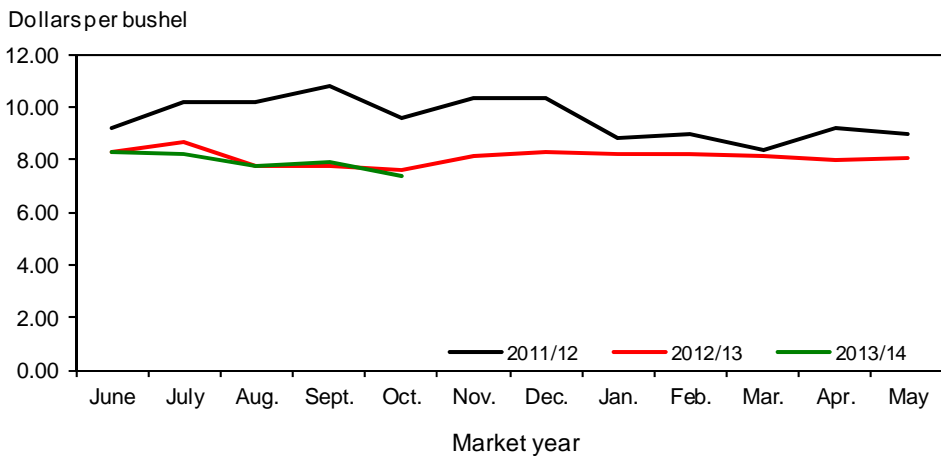
Source: USDA, National Agricultural Statistics Service, *Agricultural Prices*.

Figure 5  
**Soft white wheat average prices received by farmers**



Source: USDA, National Agricultural Statistics Service, *Agricultural Prices*.

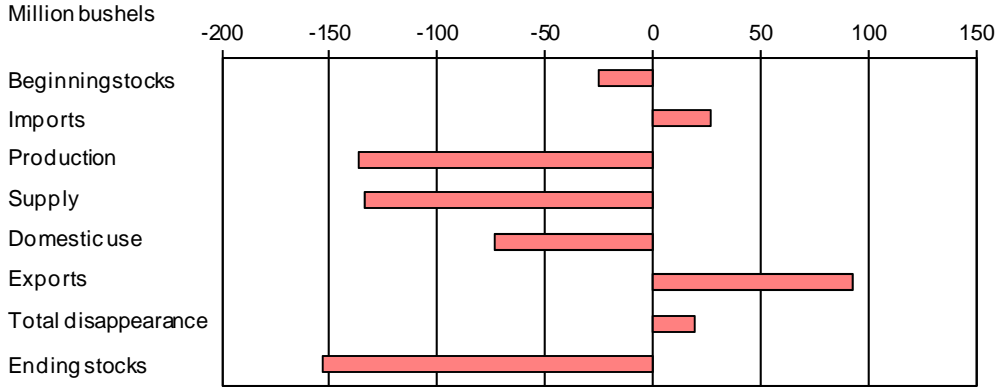
Figure 6  
**Durum wheat average prices received by farmers**



Source: USDA, National Agricultural Statistics Service, *Agricultural Prices*.

Figure 7

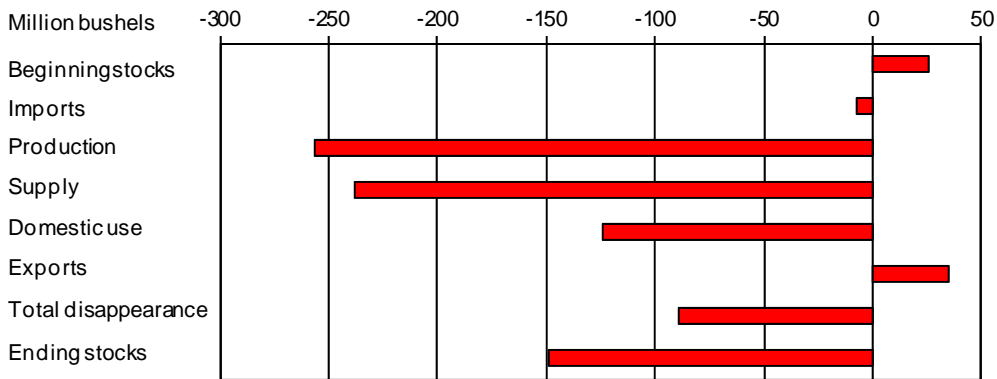
**All wheat: U.S. supply and disappearance change from prior market year**



Source: USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates*.

Figure 8

**Hard red winter wheat: U.S. supply and disappearance change from prior market year**



Source: USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates*.

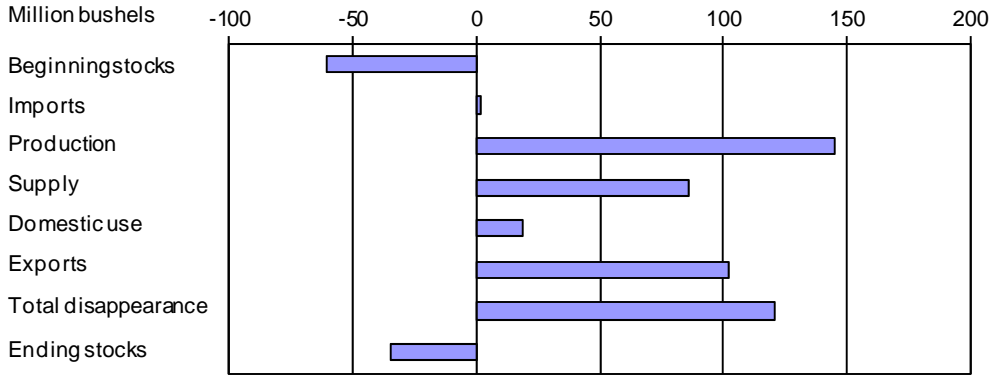
Figure 9

**Hard red spring wheat: U.S. supply and disappearance change from prior market year**



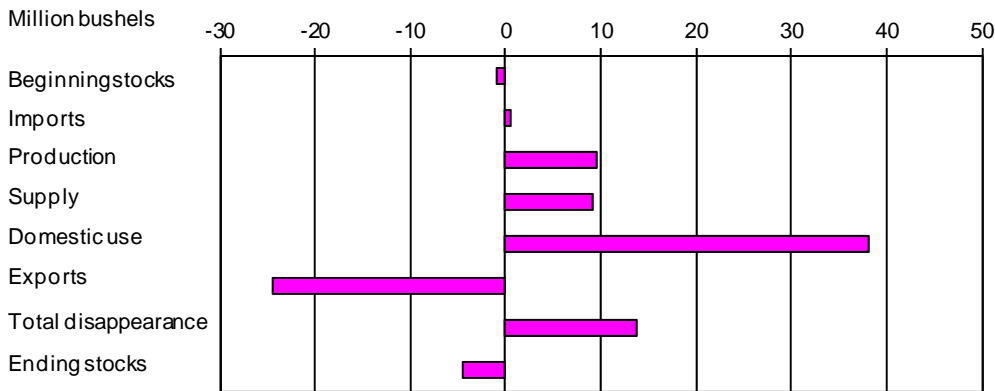
Source: USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates*.

Figure 10  
**Soft red winter wheat: U.S. supply and disappearance change from prior market year**



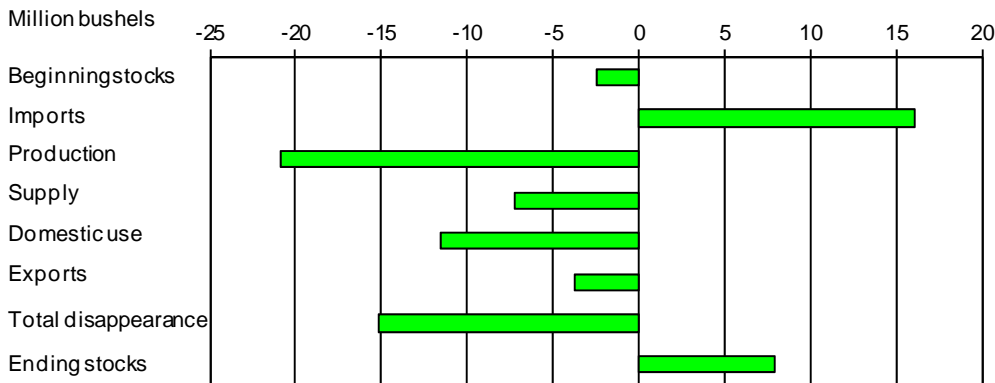
Source: USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates*.

Figure 11  
**White wheat: U.S. supply and disappearance change from prior market year**



Source: USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates*.

Figure 12  
**Durum: U.S. supply and disappearance change from prior market year**



Source: USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates*.

## Contacts and Links

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### Data

*Wheat Monthly Tables* <http://www.ers.usda.gov/publications/whs-wheat-outlook>

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<http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1194>

Grain Circular, [http://www.fas.usda.gov/grain\\_arc.asp](http://www.fas.usda.gov/grain_arc.asp)

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Table 1--Wheat: U.S. market year supply and disappearance, 11/13/2013

Item and unit		2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14
Area:								
Planted	Million acres	60.5	63.2	59.2	53.6	54.4	55.7	56.2
Harvested	Million acres	51.0	55.7	49.9	47.6	45.7	48.9	45.2
Yield	Bushels per acre	40.2	44.9	44.5	46.3	43.7	46.3	47.2
Supply:								
Beginning stocks	Million bushels	456.2	305.8	656.5	975.6	862.2	742.6	717.9
Production	Million bushels	2,051.1	2,499.2	2,218.1	2,206.9	1,999.3	2,266.0	2,129.7
Imports 1/	Million bushels	112.6	127.0	118.6	96.9	112.1	122.8	150.0
Total supply	Million bushels	2,619.9	2,932.0	2,993.2	3,279.5	2,973.7	3,131.4	2,997.6
Disappearance:								
Food use	Million bushels	947.9	926.8	918.9	925.6	941.4	945.0	950.0
Seed use	Million bushels	87.6	78.0	69.5	70.9	76.2	73.0	73.0
Feed and residual use	Million bushels	16.0	255.2	149.8	129.3	162.4	388.1	310.0
Total domestic use	Million bushels	1,051.4	1,260.0	1,138.2	1,125.8	1,180.0	1,406.2	1,333.0
Exports 1/	Million bushels	1,262.6	1,015.4	879.3	1,291.4	1,051.1	1,007.4	1,100.0
Total disappearance	Million bushels	2,314.1	2,275.4	2,017.5	2,417.2	2,231.0	2,413.5	2,433.0
Ending stocks	Million bushels	305.8	656.5	975.6	862.2	742.6	717.9	564.6
Stocks-to-use ratio		13.2	28.9	48.4	35.7	33.3	29.7	23.2
Loan rate	Dollars per bushel	2.75	2.75	2.75	2.94	2.94	2.94	2.94
Contract/direct payment rate	Dollars per bushel	0.52	0.52	0.52	0.52	0.52	0.52	0.52
Farm price 3/	Dollars per bushel	6.48	6.78	4.87	5.70	7.24	7.77	6.70-7.30
Government payments	Million dollars	1,118						
Market value of production	Million dollars	13,289	16,626	10,654	12,827	14,323	17,607	14,908

Latest market year is projected; previous market year is estimated. Totals may not add due to rounding.

1/ Includes flour and selected other products expressed in grain-equivalent bushels.

2/ Stocks owned by USDA's Commodity Credit Corporation (CCC). Most CCC-owned inventory is in the Bill Emerson Humanitarian Trust.

3/ U.S. season-average price based on monthly prices weighted by monthly marketings. Prices do not include an allowance for loans outstanding and government purchases.

Source: USDA, World Agricultural Outlook Board, World Agricultural Supply and Demand Estimates and supporting materials.

Date run: 11/12/2013



Table 2--Wheat by class: U.S. market year supply and disappearance, 11/13/2013

Market year, item, and unit		All wheat	Hard red winter 1/	Hard red spring 1/	Soft red winter 1/	White 1/	Durum	
2012/13	Area:							
	Planted acreage	Million acres	55.67	29.77	11.69	8.12	3.93	2.15
	Harvested acreage	Million acres	48.92	24.57	11.48	6.97	3.77	2.13
	Yield	Bushels per acre	46.32	40.70	43.95	60.27	68.62	38.83
	Supply:							
	Beginning stocks	Million bushels	742.62	317.15	151.00	185.00	64.00	25.47
	Production	Million bushels	2,266.03	1,000.01	504.52	419.80	258.91	82.80
	Imports 2/	Million bushels	122.76	17.67	43.85	17.86	7.40	35.97
	Total supply	Million bushels	3,131.40	1,334.83	699.37	622.67	330.31	144.24
	Disappearance:							
	Food use	Million bushels	945.03	400.03	228.00	152.00	85.00	80.00
	Seed use	Million bushels	73.01	33.32	13.10	19.11	5.51	1.97
	Feed and residual use	Million bushels	388.11	178.70	61.66	134.91	2.31	10.53
	Total domestic use	Million bushels	1,406.15	612.05	302.76	306.02	92.82	92.50
	Exports 2/	Million bushels	1,007.36	379.94	231.61	192.64	174.49	28.69
	Total disappearance	Million bushels	2,413.51	991.99	534.37	498.67	267.31	121.19
	Ending stocks	Million bushels	717.89	342.84	165.00	124.00	63.00	23.05
2013/14	Area:							
	Planted acreage	Million acres	56.16	29.57	10.94	10.02	4.16	1.47
	Harvested acreage	Million acres	45.16	20.22	10.70	8.87	3.95	1.42
	Yield	Bushels per acre	47.83	36.80	45.84	63.67	68.01	64.68
	Supply:							
	Beginning stocks	Million bushels	717.89	342.84	165.00	124.00	63.00	23.05
	Production	Million bushels	2,129.70	744.03	490.39	564.91	268.45	61.91
	Imports 2/	Million bushels	150.00	10.00	60.00	20.00	8.00	52.00
	Total supply	Million bushels	2,997.58	1,096.87	715.39	708.91	339.45	136.96
	Disappearance:							
	Food use	Million bushels	950.00	366.00	266.00	155.00	85.00	78.00
	Seed use	Million bushels	73.00	32.00	17.00	15.00	6.00	3.00
	Feed and residual use	Million bushels	310.00	90.00	25.00	155.00	40.00	.00
	Total domestic use	Million bushels	1,333.00	488.00	308.00	325.00	131.00	81.00
	Exports 2/	Million bushels	1,100.00	415.00	215.00	295.00	150.00	25.00
	Total disappearance	Million bushels	2,433.00	903.00	523.00	620.00	281.00	106.00
	Ending stocks	Million bushels	564.58	193.87	192.39	88.91	58.45	30.96

Latest market year is projected; previous market year is estimated. Totals may not add due to rounding.

1/ Area and yield data are unpublished National Agricultural Statistics Service data. Supply and disappearance data, except production, are approximations.

2/ Includes flour and selected other products expressed in grain-equivalent bushels.

Source: USDA, National Agricultural Statistics Service, Crop Production and unpublished data; and USDA, World Agricultural Outlook Board, World Agricultural Supply and Demand Estimates and supporting materials.

Date run: 11/12/2013

Table 3--Wheat: U.S. quarterly supply and disappearance (million bushels), 11/13/2013

Market year and quarter	Production	Imports 1/	Total supply	Food use	Seed use	Feed and residual use	Exports 1/	Ending stocks
2005/06								
Jun-Aug	2,103	19	2,662	231	2	261	244	1,923
Sep-Nov		20	1,944	238	50	-61	286	1,429
Dec-Feb		20	1,450	219	1	4	252	972
Mar-May		22	995	228	24	-49	220	571
Mkt. year	2,103	81	2,725	917	77	157	1,003	571
2006/07								
Jun-Aug	1,808	26	2,406	235	2	205	214	1,751
Sep-Nov		29	1,780	243	56	-47	212	1,315
Dec-Feb		32	1,346	225	1	28	235	857
Mar-May		34	891	234	22	-69	247	456
Mkt. year	1,808	122	2,501	938	82	117	908	456
2007/08								
Jun-Aug	2,051	30	2,538	240	1	257	323	1,717
Sep-Nov		21	1,738	245	60	-120	421	1,132
Dec-Feb		24	1,156	227	2	-44	261	709
Mar-May		37	746	236	25	-77	257	306
Mkt. year	2,051	113	2,620	948	88	16	1,263	306
2008/09								
Jun-Aug	2,499	28	2,833	236	2	393	345	1,858
Sep-Nov		28	1,886	238	54	-124	295	1,422
Dec-Feb		36	1,458	219	1	28	170	1,040
Mar-May		35	1,075	233	21	-41	206	657
Mkt. year	2,499	127	2,932	927	78	255	1,015	657
2009/10								
Jun-Aug	2,218	28	2,902	231	1	261	200	2,209
Sep-Nov		24	2,234	237	45	-83	252	1,782
Dec-Feb		30	1,812	222	1	31	201	1,356
Mar-May		37	1,393	229	21	-59	227	976
Mkt. year	2,218	119	2,993	919	69	150	879	976
2010/11								
Jun-Aug	2,207	27	3,210	235	2	259	265	2,450
Sep-Nov		24	2,473	242	52	-63	311	1,933
Dec-Feb		23	1,956	221	1		308	1,425
Mar-May		22	1,448	228	16	-67	407	862
Mkt. year	2,207	97	3,279	926	71	129	1,291	862
2011/12								
Jun-Aug	1,999	21	2,882	230	5	206	295	2,147
Sep-Nov		32	2,179	244	51	-17	238	1,663
Dec-Feb		30	1,693	231	1	43	217	1,199
Mar-May		29	1,228	236	19	-71	301	743
Mkt. year	1,999	112	2,974	941	76	162	1,051	743
2012/13								
Jun-Aug	2,266	25	3,034	238	1	426	264	2,105
Sep-Nov		33	2,137	247	55	-32	197	1,671
Dec-Feb		35	1,705	225	1	10	234	1,235
Mar-May		30	1,265	236	15	-16	312	718
Mkt. year	2,266	123	3,131	945	73	388	1,007	718
2013/14								
Jun-Aug	2,130	35	2,882	237	3	427	359	1,857
Mkt. year	2,130	150	2,998	950	73	310	1,100	565

Latest market year is projected; previous market year is estimated. Totals may not add due to rounding.

1/ Includes flour and selected other products expressed in grain-equivalent bushels.

Source: USDA, World Agricultural Outlook Board, World Agricultural Supply and Demand Estimates and supporting materials.

Date run: 11/12/2013

Table 4--Wheat: Monthly food disappearance estimates (1,000 grain-equivalent bushels), 11/13/2013

Mkt year and month 1/	Wheat ground for flour	+	Food imports 2/	+	Nonmilled food use 3/	-	Food exports 2/	=	Food use 4/
2011/12	Jun	70,554		2,237		2,000		1,743	73,048
	Jul	72,573		2,098		2,000		1,327	75,344
	Aug	79,317		2,308		2,000		2,390	81,235
	Sep	76,269		2,245		2,000		1,652	78,863
	Oct	81,402		2,247		2,000		1,487	84,162
	Nov	77,915		2,568		2,000		1,763	80,720
	Dec	73,135		2,464		2,000		1,291	76,308
	Jan	74,522		2,579		2,000		1,233	77,868
	Feb	73,931		2,057		2,000		1,330	76,658
	Mar	78,437		2,555		2,000		1,843	81,149
	Apr	74,497		2,622		2,000		1,513	77,606
	May	76,171		2,530		2,000		2,310	78,390
2012/13	Jun	72,876		2,173		2,000		1,760	75,290
	Jul	75,861		2,296		2,000		2,912	77,245
	Aug	82,910		2,345		2,000		2,193	85,063
	Sep	79,725		2,069		2,000		2,283	81,511
	Oct	81,567		2,462		2,000		1,840	84,189
	Nov	78,073		2,438		2,000		1,613	80,897
	Dec	73,283		2,369		2,000		1,442	76,210
	Jan	72,290		2,191		2,000		1,550	74,931
	Feb	71,716		2,101		2,000		1,674	74,143
	Mar	76,088		2,391		2,000		1,744	78,734
	Apr	74,750		2,581		2,000		1,432	77,899
	May	76,429		2,530		2,000		2,042	78,917
2013/14	Jun	73,123		2,277		2,000		2,430	74,970
	Jul	74,355		2,519		2,000		1,474	77,399
	Aug	81,264		2,548		2,000		1,450	84,363

1/ Current year is preliminary. Previous year is preliminary through August of current year, estimated afterwards.

2/ Food imports and exports used to calculate total food use. Includes all categories of wheat flour, semolina, bulgur, and couscous and selected categories of pasta.

3/ Wheat prepared for food use by processes other than milling.

4/ Estimated food use equals wheat ground for flour plus food imports plus nonmilled food use minus food exports. See <http://www.ers.usda.gov/Briefing/Wheat/wheatfooduse.htm> for more information.

Source: Data through the 2nd quarter of 2011 was calculated using data from U.S. Department of Commerce, Bureau of the Census' Flour Milling Products (MQ311A) and U.S. Department of Commerce, Bureau of Economic Analysis' Foreign Trade Statistics.

Subsequent flour milling calculations are based on data from the North American Millers Association.

Date run: 11/12/2013

Table 5--Wheat: National average price received by farmers (dollars per bushel) 1/, 11/13/2013

Month	All wheat		Winter		Durum		Other spring	
	2012/13	2013/14	2012/13	2013/14	2012/13	2013/14	2012/13	2013/14
June	6.70	7.32	6.55	7.18	8.31	8.26	7.78	7.72
July	7.89	6.93	7.76	6.85	8.67	8.17	8.39	7.29
August	8.04	6.87	7.92	6.81	7.76	7.76	8.27	6.97
September	8.27	6.80	8.25	6.79	7.77	7.90	8.38	6.71
October	8.38	7.09	8.33	7.09	7.61	7.33	8.56	7.06
November	8.47		8.38		8.11		8.65	
December	8.30		8.15		8.31		8.48	
January	8.12		8.01		8.24		8.34	
February	7.97		7.85		8.19		8.11	
March	7.79		7.63		8.12		7.95	
April	7.71		7.52		8.01		7.90	
May	7.68		7.49		8.06		7.84	

1/ Preliminary mid-month, weighted-average price for current month.

Source: USDA, National Agricultural Statistics Service, Agricultural Prices.

Table 6--Wheat: National average prices received by farmers by class (dollars per bushel), 11/13/2013

Month	Hard red winter		Soft red winter		Hard red spring		White	
	2012/13	2013/14	2012/13	2013/14	2012/13	2013/14	2012/13	2013/14
June	6.53	7.35	6.59	6.92	7.81	7.73	6.61	7.29
July	7.74	7.04	7.84	6.55	8.41	7.29	7.76	7.19
August	7.97	6.94	8.30	6.34	8.32	6.98	7.66	6.90
September	8.36	6.92	8.38	6.19	8.42	6.72	7.99	6.71
October	8.43		8.35		8.60		8.10	
November	8.49		8.34		8.69		8.14	
December	8.20		8.19		8.50		7.99	
January	8.02		7.90		8.38		8.03	
February	7.75		7.78		8.11		8.05	
March	7.50		7.46		7.94		8.05	
April	7.49		7.42		7.91		7.71	
May	7.56		7.31		7.86		7.42	

Source: USDA, National Agricultural Statistics Service, Agricultural Prices.

Date run: 11/12/2013

Table 7--Wheat: Average cash grain bids at principal markets, 11/13/2013

Month	No. 1 hard red winter (ordinary protein) Kansas City, MO (dollars per bushel)		No. 1 hard red winter (13% protein) Kansas City, MO (dollars per bushel)		No. 1 hard red winter (ordinary protein) Portland, OR (dollars per bushel)		No. 1 hard red winter (ordinary protein) Texas Gulf, TX 1/ (dollars per metric ton)	
	2012/13	2013/14	2012/13	2013/14	2012/13	2013/14	2012/13	2013/14
June	7.61	8.32	8.13	8.65	6.75	8.44	276.31	313.42
July	9.13	8.14	9.73	8.36	8.66	7.96	345.76	304.79
August	9.43	8.12	9.77	8.16	9.07	7.99	349.07	305.52
September	9.56	--	9.86	--	9.27	--	353.29	307.54
October	9.62	8.70	9.97	8.82	9.39	--	358.07	--
November	9.73	--	10.04	--	9.62	--	360.64	--
December	9.36	--	9.71	--	9.26	--	347.78	--
January	9.09	--	9.41	--	8.91	--	335.47	--
February	8.70	--	9.04	--	8.66	--	318.94	--
March	8.35	--	8.72	--	8.62	--	309.75	--
April	8.30	--	8.75	--	8.59	--	308.28	--
May	8.53	--	8.90	--	8.79	--	319.12	--
Month	No. 1 dark northern spring (13% protein) Chicago, IL (dollars per bushel)		No. 1 dark northern spring (14% protein) Chicago, IL (dollars per bushel)		No. 1 dark northern spring (14% protein) Portland, OR (dollars per bushel)		No. 1 hard amber durum Minneapolis, MN (dollars per bushel)	
	2012/13	2013/14	2012/13	2013/14	2012/13	2013/14	2012/13	2013/14
June	9.02	9.08	9.31	9.18	9.08	9.13	--	--
July	10.06	8.56	10.12	8.57	9.17	8.59	--	--
August	9.70	8.10	9.71	8.37	9.79	8.39	--	--
September	9.81	--	9.82	--	9.86	--	--	--
October	10.22	8.63	10.17	8.78	9.66	8.40	--	--
November	10.12	--	10.15	--	10.21	--	--	--
December	9.82	--	9.83	--	9.85	--	--	--
January	9.34	--	9.43	--	9.48	--	--	--
February	9.24	--	9.33	--	9.34	--	--	--
March	9.08	--	9.17	--	9.45	--	--	--
April	8.77	--	9.11	--	9.30	--	--	--
May	--	--	9.15	--	9.30	--	--	--
Month	No. 2 soft red winter St. Louis, MO (dollars per bushel)		No. 2 soft red winter Chicago, IL (dollars per bushel)		No. 2 soft red winter Toledo, OH (dollars per bushel)		No. 1 soft white Portland, OR (dollars per bushel)	
	2012/13	2013/14	2012/13	2013/14	2012/13	2013/14	2012/13	2013/14
June	6.64	7.22	6.56	6.94	6.62	6.75	6.97	--
July	8.46	6.72	8.57	6.60	8.70	6.50	8.53	7.23
August	8.60	--	8.70	6.26	8.69	6.32	8.69	7.32
September	8.60	6.31	8.62	6.41	8.59	6.32	8.77	--
October	8.41	--	8.49	--	8.40	--	8.75	7.27
November	8.52	--	8.58	--	8.38	--	8.87	--
December	8.04	--	8.03	--	7.91	--	8.56	--
January	7.88	--	7.69	--	7.40	--	8.53	--
February	7.70	--	7.40	--	7.10	--	8.59	--
March	7.41	--	7.18	--	7.00	--	8.16	--
April	7.41	--	6.97	--	6.87	--	7.93	--
May	7.22	--	7.01	--	6.91	--	7.71	--

-- = Not available or no quote.

1/ Free on board.

Source: USDA, Agricultural Marketing Service, State Grain Reports, <http://www.ams.usda.gov/AMSV1.0/ams.fetchTemplateData.do?template=TemplateS&navID=MarketNewsAndTransportationData&leftNav=MarketNewsAndTransportationData&page=LSSMarketNewsPa geStateGrainReports>.

Date run: 11/12/2013

Table 8--Wheat: U.S. exports and imports for last 6 months (1,000 bushels), 11/13/2013

Item		Mar 2013	Apr 2013	May 2013	Jun 2013	Jul 2013	Aug 2013
Exports	All wheat grain	101,785	108,878	96,400	98,174	113,731	141,038
	All wheat flour 1/	928	785	1,506	1,623	986	846
	All wheat products 2/	851	656	704	927	533	656
	Total all wheat	103,564	110,318	98,610	100,724	115,250	142,540
Imports	All wheat grain	6,464	8,629	7,689	8,104	9,516	9,502
	All wheat flour 1/	848	914	1,019	875	927	960
	All wheat products 2/	1,563	1,680	1,534	1,416	1,612	1,609
	Total all wheat	8,875	11,223	10,241	10,396	12,055	12,072

Totals may not add due to rounding.

1/ Expressed in grain-equivalent bushels. Includes meal, groats, and durum.

2/ Expressed in grain-equivalent bushels. Includes bulgur, couscous, and selected categories of pasta.

Source: U.S. Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics; and ERS calculations using Census trade statistics.

Date run: 11/12/2013

Table 9--Wheat: U.S. exports, Census and export sales comparison (1,000 metric tons),11/8/13

Importing country	2011/12		2012/13		2013/14 (as of 10/31/13)		
					Shipments	standing	Total
Data source	Census 1/	Export sales 2/	Census 1/	Export sales 2/	Export sales 2/		
Country:							
China	542	534	883	743	3,428	599	4,028
Japan	3,513	3,512	3,639	3,544	1,196	238	1,434
Mexico	3,794	3,496	2,907	2,760	1,431	563	1,994
Nigeria	3,228	3,248	3,031	3,002	1,162	406	1,568
Philippines	2,050	2,039	1,850	1,965	796	381	1,177
Korean Rep.	2,133	1,983	1,311	1,385	401	431	833
Egypt	916	950	1,737	1,678	58	0	58
Taiwan	893	888	1,065	1,038	374	231	189
Indonesia	794	830	488	534	447	56	502
Venezuela	642	594	632	631	230	170	400
Iraq	571.8	572	209	209	0	0	0
EU-27	1,186	1,228	1,323	971	281	78	359
Total grain	27,951	26,627	26,837	26,348	15,683	5,225	20,908
Total (including products)	28,563	26,813	27,116	26,410	15,707	5,232	20,938
USDA forecast of Census				27,416			29,937

1/ Source: U.S. Department of Commerce, U.S. Census Bureau

2/ Source: USDA, Foreign Agricultural Service, *U.S. Export Sales*.