



# Outlook for U.S. Agricultural Trade

## FY 2017 Exports Forecast Up \$2.0 Billion to \$136.0 Billion; Imports at Record \$114.5 Billion

Fiscal year 2017 agricultural exports are projected at \$136.0 billion, up \$2.0 billion from the November forecast, largely due to expected increases in livestock, poultry, and dairy exports. Strong foreign demand and higher prices help boost livestock, poultry, and dairy exports by \$1.6 billion, with beef, pork, and dairy leading the increase from the last report. Grain and feed exports are forecast down \$1.0 billion to \$28.6 billion, as declines in feeds and fodders and coarse grains more than offset higher wheat exports. Cotton exports are forecast at \$5.0 billion, a \$600 million increase, due to strong demand from most major markets and a larger, higher quality U.S. crop. Oilseed and product exports are forecast at \$31.6 billion, up \$600 million as strong soybean prices more than offset reductions in soybean meal exports. Horticultural product exports are unchanged at \$34.0 billion

U.S. agricultural imports in fiscal year 2017 are forecast at \$114.5 billion, up \$2.0 billion from the November forecast. Horticultural product imports lead the increase and are expected to reach a new record of \$54.4 billion. The U.S. agricultural trade surplus is unchanged at \$21.5 billion.

Table 1--U.S. agricultural trade, fiscal years 2011-17, year ending September 30

Item	2011	2012	2013	2014	2015	2016	Forecast fiscal year*	
							2017	
							Nov.	Feb.
<i>Billion dollars</i>								
Exports	137.5	135.9	141.1	152.3	139.7	129.7	134.0	136.0
Imports	94.5	103.4	103.9	109.3	114.2	113.1	112.5	114.5
Balance	43.0	32.5	37.3	43.1	25.5	16.6	21.5	21.5

\*Reflect forecasts in the February 9, 2017, *World Agricultural Supply and Demand Estimates* report.

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

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World Agricultural  
Outlook Board.

### *Potential for positive momentum in the global economy*

World per capita GDP growth at 1.2 percent in 2016 is expected to accelerate to 1.6 percent in 2017. Per capita income growth in the key emerging markets of Brazil, Russia, India, Indonesia, and China is expected to be 3.7 percent in 2016, increasing to 4.3 percent in 2017 as recessions in Brazil and Russia abate.

Per capita income growth in the United States is expected to rise to 1.5 percent in 2017 due to the anticipation of expansionary fiscal policies, even as the details and the scope of any new policies remain unclear at this time. Meanwhile, the agricultural exports-weighted dollar value index is expected to maintain its strength, with a 3.7 percent appreciation in 2017. The strong dollar is thus expected to continue to weigh on U.S. agricultural export competitiveness.

In Mexico, growth rates have been adjusted downward from the previous forecast due to inflationary concerns as domestic fuel prices rise and the peso weakens. Inflationary pressure has led the Bank of Mexico to raise its overnight policy rate from 4.25 percent in September to 6.25 percent in February. Canadian economic growth rates are expected to improve in 2017. An expansionary fiscal policy and industries outside of the energy sector are expected to drive growth while the energy sector slowly recovers as oil prices pick up.

Oil prices are expected to trend slightly upward in 2017. The U.S. Energy Information Administration adjusted its forecast of Brent crude spot price up to \$55 per barrel for 2017, which is slightly above annual average prices in 2015 and 2016. However, 2017 prices remain low when compared to 2010-14, when they often exceeded \$100 per barrel. Comparatively lower prices will continue to provide farmers, manufacturers, fertilizer producers, and farm product exporters a low cost environment.

Per capita income growth in Asia and Oceania is expected to be stable at 3.5 percent in 2017. Japan's per capita GDP is expected to improve in 2017, as a weaker yen has a positive impact on exports and investments. Per capita income growth in China is expected to remain strong, though to slow slightly in 2017 to 5.9 percent from 6.3 percent in 2016. Rising credit and debt concerns are expected to limit loosening of monetary conditions, but continued fiscal intervention in infrastructure, health, and other sectors remains effective. India's per capita income growth is relatively strong at 6.0 percent in 2017, as disruptions to economic activity from demonetization are overcome by policy reforms and pent-up consumer demand as the year continues.

The Latin American region is expected to pull out of recession in 2017 with income growth of 0.2 percent. In 2016, the region's GDP per capita fell 2.3 percent, largely because of persistent recessions in Brazil and Venezuela. In Venezuela, the recession is expected to continue, but the economy is expected to shrink at a slower pace in 2017. Inflation is estimated to be very high, but oil production may halt its slide this year as higher prices encourage much needed maintenance and investment. Argentina's income per capita is expected to grow 1.6 percent this year after contracting in 2016, due to a deceleration in inflation and government spending.

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

Region/Country 3/	Real exchange rate 2/		Real GDP per capita		Share of World		Share of U.S.
	2016	2017	2016	2017	GDP	Population	Ag. exports
	Percent change		Growth rate		2013-15 Average		
<b>World</b>	<b>2.1</b>	<b>3.7</b>	<b>1.2</b>	<b>1.6</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>
<b>NAFTA</b>	<b>8.3</b>	<b>3.1</b>	<b>0.7</b>	<b>1.3</b>	<b>26.5</b>	<b>6.7</b>	<b>28.0</b>
United States	--	--	0.8	1.5	22.4	4.5	--
Canada	3.5	-0.4	0.6	1.3	2.4	0.5	15.0
Mexico	16.0	8.2	0.6	0.6	1.6	1.7	12.9
<b>Emerging Markets</b>	<b>2.2</b>	<b>0.8</b>	<b>3.7</b>	<b>4.3</b>	<b>21.2</b>	<b>44.9</b>	<b>20.4</b>
Brazil	-2.3	-5.3	-4.2	-0.3	3.3	2.8	0.9
Russia	4.1	-11.2	-0.5	1.1	2.3	2.0	0.6
India	1.1	0.1	5.7	6.0	3.0	17.4	0.7
Indonesia	-3.2	3.0	4.1	4.2	1.3	3.6	1.8
China	5.0	7.4	6.3	5.9	11.3	19.1	16.3
<b>Europe &amp; Central Asia</b>	<b>3.3</b>	<b>5.6</b>	<b>1.3</b>	<b>1.4</b>	<b>28.7</b>	<b>11.6</b>	<b>9.8</b>
Euro Zone	1.3	7.4	1.4	1.3	17.6	9.0	6.7
Ukraine	4.0	1.4	1.6	2.9	0.2	0.6	0.1
Turkey	4.3	17.3	0.9	1.5	1.2	1.1	1.3
<b>Asia &amp; Oceania</b>	<b>0.0</b>	<b>6.3</b>	<b>3.5</b>	<b>3.5</b>	<b>31.0</b>	<b>55.0</b>	<b>44.4</b>
Japan	-8.8	11.7	1.2	1.3	7.8	1.8	8.5
South Korea	2.9	3.3	2.2	2.0	1.7	0.7	4.3
Australia	1.0	2.0	1.2	0.9	1.8	0.3	1.0
Other SE Asia 4/	4.0	5.6	3.5	3.4	1.5	4.0	5.1
<b>Latin America</b>	<b>6.0</b>	<b>4.1</b>	<b>-2.3</b>	<b>0.2</b>	<b>8.1</b>	<b>8.6</b>	<b>10.1</b>
Argentina	14.1	-12.2	-3.2	1.6	0.7	0.6	0.1
Other S. America 5/	1.9	-0.7	1.3	1.7	3.2	1.6	2.9
<b>Middle East &amp; N. Africa</b>	<b>4.8</b>	<b>19.2</b>	<b>0.8</b>	<b>1.4</b>	<b>5.2</b>	<b>5.1</b>	<b>6.0</b>
<b>Sub-Saharan Africa</b>	<b>6.5</b>	<b>1.7</b>	<b>-0.2</b>	<b>0.7</b>	<b>2.2</b>	<b>13.1</b>	<b>1.6</b>

1/ Real values have a 2010 base year.

2/ Local currency per U.S. dollar. A negative growth rate indicates a depreciation of the dollar. World real exchange rate is a U.S. agricultural exports-weighted index.

3/ Regional values for Real Exchange rates are growth in GDP-weighted average of country real exchange rate index.

4/ Includes Malaysia, Philippines, Thailand, and Vietnam.

5/ Includes Chile, Colombia, Peru, Bolivia, Paraguay, and Uruguay.

Source: Calculations and compilation by U.S. Dept. of Agriculture, Economic Research Service using data and forecasts from Global Insight, the IMF, and Oxford Economics.

## Export Products

Fiscal 2017 grain and feed exports are forecast at \$28.6 billion, down \$1.0 billion from the November outlook due to lower volumes and unit values for corn, sorghum, and feeds and fodders. Coarse grain exports are forecast down \$300 million to \$10.4 billion. Corn is forecast down \$100 million to \$9.5 billion, primarily on lower unit values driven by abundant global supplies and prospects for intense competition from impending harvests in South America. Sorghum exports are forecast down \$100 million to \$900 million on slower demand, mainly from China. Exports for feeds and fodders are forecast down \$1.4 billion to \$6.0 billion primarily due to a decline in unit values for corn products, including DDGS (Distillers' Dried Grains with Solubles). At the same time that corn used for ethanol is up, demand for DDGS exports has waned, particularly from China.

Wheat exports are forecast at \$6.1 billion, up \$700 million based on larger volumes and higher unit values. Volume is up based on the strong pace of old crop sales, while unit values are up based on strong prices, particularly for high-protein spring wheat. Also supporting higher unit values is a sharp reduction in winter wheat planted area, based on USDA's January *Winter Wheat and Canola Seedings* report. Rice exports are forecast unchanged at \$1.7 billion as lower unit values offset higher volumes. Volumes are raised as stronger rough-rice shipments to Latin America more than offset weaker milled-rice exports to the Middle East.

Oilseed and product exports are forecast at \$31.6 billion, up \$600 million, in response to strong soybean unit prices, offset by slightly lower meal and oil export unit values. Soybean export value is raised \$900 million to \$22.6 billion, while meal is lowered \$200 million to \$4.0 billion. Soybean export value is projected higher, with continuing global demand led by China. The strengthening Brazilian real is reducing price discounts from South America and is expected to support higher prices of soybeans.

Soybean meal export value is reduced, on lower projected volumes and marginally lower unit prices. Large supplies expected from South America, coupled with an abundance of competitively priced grains and DDGS, are expected to place downward pressure on soybean meal prices. Soybean oil export value is under pressure from growing output from South America.

Cotton exports are forecast at \$5.0 billion, up \$600 million. Export volume is forecast up 200,000 tons to 2.8 million on higher shipments and sales to most major markets, especially China, Vietnam, and Bangladesh, and is made possible by a larger U.S. crop than previously expected. Unit values are also up, driven by strong demand from major importers, strong speculative activity in the New York futures market, and a higher quality crop than previously expected.

Livestock, dairy, and poultry exports are raised \$1.6 billion to \$28.1 billion, mostly due to higher shipments of red meat and products. Beef is raised \$500 million to \$5.8 billion as rising demand in Asia boosts volumes and stronger domestic and export demand has supported prices. Pork is raised \$300 million on robust demand in Mexico. Variety meat exports are forecast \$200 million higher and have also benefited from strong sales to Asia, especially for pork variety meats to China. Robust demand has spurred strong expansion in lard, tallow, and grease shipments.

Poultry and products are forecast slightly higher at \$4.8 billion on marginal gains from broiler meat, turkey meat, and egg and egg products, driven by growing demand in a number of countries. Dairy exports are raised \$200 million to \$5.5 billion on stronger prices for most products, especially butter and whey.

Horticultural product exports are unchanged at \$34.0 billion. Fresh fruit and vegetable exports are forecast unchanged at \$6.8 billion, with top markets including Canada, Europe, and Japan. Processed fruit and vegetable exports are forecast unchanged at \$7.3 billion. Whole and processed tree nut exports are forecast unchanged at \$9.0 billion, with top markets including Europe and China.

Table 3--U.S. agricultural exports: Value and volume by commodity, 2016-2017

Commodity	October -December		Fiscal year 2016	Forecast Fiscal year 2017	
	2016	2017		Nov.	Feb.
<b>VALUE</b>					
---Billion dollars---					
Grains and feeds 1/	6.395	7.092	29.613	29.6	28.6
Wheat 2/	1.048	1.248	5.138	5.4	6.1
Rice	0.477	0.486	1.900	1.7	1.7
Coarse grains 3/	1.879	2.367	10.791	10.7	10.4
Corn	1.291	2.080	9.154	9.6	9.5
Feeds and fodders	1.866	1.878	7.454	7.4	6.0
Oilseeds and products 4/	11.881	14.294	29.485	31.0	31.6
Soybeans	9.549	11.981	20.435	21.7	22.6
Soybean meal 5/	1.078	0.990	4.173	4.2	4.0
Soybean oil	0.278	0.265	0.842	0.8	0.8
Livestock, poultry, and dairy	6.415	7.285	25.563	26.5	28.1
Livestock products	4.151	4.786	16.445	16.5	17.8
Beef and veal 6/	1.299	1.553	5.186	5.3	5.8
Pork 6/	1.170	1.365	4.748	4.7	5.0
Beef and pork variety meats 6/	0.387	0.495	1.585	1.6	1.8
Hides, skins, and furs	0.424	0.457	1.889	1.9	2.0
Poultry and products	1.094	1.201	4.543	4.7	4.8
Broiler meat 6/ 7/	0.644	0.719	2.777	2.9	2.9
Dairy products	1.170	1.298	4.576	5.3	5.5
Tobacco, unmanufactured	0.188	0.231	1.046	1.1	1.1
Cotton	0.502	1.019	3.443	4.4	5.0
Seeds	0.472	0.539	1.601	1.5	1.5
Horticultural products 8/	8.886	9.474	32.957	34.0	34.0
Fruits and vegetables, fresh	1.695	1.712	6.993	6.8	6.8
Fruits and vegetables, processed 8/	1.890	1.937	7.400	7.3	7.3
Tree nuts, whole and processed	2.649	2.991	7.632	9.0	9.0
Sugar and tropical products 9/	1.525	1.491	6.010	6.0	6.0
Major bulk products 10/	13.643	17.332	42.754	46.5	48.5
Total	36.265	41.428	129.726	134.0	136.0
<b>VOLUME</b>					
Wheat 2/	4.323	5.629	22.458	25.6	27.0
Rice	0.883	1.143	3.900	4.0	4.1
Coarse grains 3/	9.627	13.367	59.195	63.1	62.5
Corn	6.894	11.736	51.135	56.5	56.5
Feeds and fodders	5.499	5.620	22.277	21.9	20.8
Soybeans	25.987	29.532	54.105	55.8	55.8
Soybean meal 5/	2.852	2.603	10.853	10.9	10.5
Soybean oil	0.333	0.323	1.016	1.0	1.0
Beef and veal 6/	0.199	0.244	0.800	0.9	0.9
Pork 6/	0.439	0.496	1.732	1.8	1.9
Beef and pork variety meats 6/	0.185	0.235	0.764	0.9	0.9
Broiler meat 6/ 7/	0.679	0.786	2.908	3.1	3.1
Tobacco, unmanufactured	0.027	0.035	0.157	0.2	0.2
Cotton	0.307	0.585	2.191	2.6	2.8
Major bulk products 10/	41.153	50.291	142.005	151.3	152.4
Total 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/ Excludes corn gluten feed and meal. 5/ Includes soy flours made from protein meals. 6/ Includes chilled, frozen, and processed meats. 7/ Includes only federally inspected product. 8/ Includes juices. 9/ Includes coffee and cocoa products, tea, and spices. 10/ Includes wheat, rice, coarse grains, soybeans, cotton, and unmanufactured tobacco.

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

## Regional Exports

Agricultural exports in fiscal 2017 are forecast at \$136.0 billion, \$2.0 billion higher than the November forecast. Livestock and dairy, cotton, and oilseeds account for most of the increase, which helps boost forecasted exports to Asia by \$1.9 billion.

### *Asia*

The forecast for China is \$22.3 billion, \$500 million higher than the November forecast. While shipments of sorghum and DDGS have declined, China continues to have a strong appetite for soybeans, cotton, pork and pork variety meats, and dairy (especially whey products).

Exports to Japan are forecast up \$200 million to \$11.2 billion on the strength of beef and pork demand. The export forecast for South Korea, which totals \$6.4 billion, is raised by \$300 million, buoyed by higher cotton shipments and stronger animal product exports. Taiwan is forecast up \$200 million to \$3.3 billion on robust demand for beef and soybeans.

Exports to Indonesia are forecast up \$200 million to \$2.7 billion on strong soybean and cotton shipment pace. Exports to the Philippines are forecast up \$100 million to \$2.5 billion, as sales of dairy, wheat, and soybeans are higher than expected. Vietnam is forecast up \$300 million to \$2.4 billion due to higher cotton demand, which is also behind the \$100 million increase in the export forecast for India, now at \$1.3 billion.

### *Western Hemisphere*

The North American forecast is unchanged at \$39.6 billion. Canada and Mexico remain the second and third largest U.S. agricultural markets, with exports forecast at \$21.3 billion and \$18.3 billion, respectively. Robust pork demand in Mexico is offset by moderate declines in beef and poultry.

The forecast for South America is up \$100 million due to strong wheat demand in Brazil, which boosts the export forecast for Brazil to \$900 million.

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

The forecasts for exports to Europe, Africa, and the Middle East remain unchanged.



Table 4--U.S. agricultural exports: Value by region, 2016-2017

Country and region 1/	October - December		Fiscal year	Share of	Forecast	
	2016	2017	2016	2016 total	Fiscal year 2017	
	-- \$ Billion --			Percent	-- \$ Billion --	
					Nov.	Feb.
<b>VALUE</b>						
Asia	16.956	21.606	54.854	42.3	58.0	59.9
East Asia	13.957	17.626	42.087	32.4	45.6	46.8
Japan	2.269	2.715	10.614	8.2	11.0	11.2
China	8.552	10.794	19.171	14.8	21.8	22.3
Hong Kong	1.148	1.478	3.505	2.7	3.6	3.6
Taiwan	0.810	0.968	3.080	2.4	3.1	3.3
South Korea	1.176	1.669	5.708	4.4	6.1	6.4
Southeast Asia	2.412	3.349	10.273	7.9	10.1	10.7
Indonesia	0.442	0.746	2.386	1.8	2.5	2.7
Philippines	0.559	0.664	2.461	1.9	2.4	2.5
Malaysia	0.205	0.207	0.800	0.6	0.9	0.9
Thailand	0.450	0.584	1.470	1.1	1.6	1.6
Vietnam	0.582	0.898	2.355	1.8	2.1	2.4
South Asia	0.586	0.631	2.494	1.9	2.4	2.5
India	0.305	0.333	1.246	1.0	1.2	1.3
Western Hemisphere	12.719	13.262	51.463	39.7	52.7	52.7
North America	9.556	9.654	37.994	29.3	39.6	39.6
Canada	5.060	4.964	20.338	15.7	21.3	21.3
Mexico	4.496	4.690	17.656	13.6	18.3	18.3
Caribbean	0.835	0.940	3.278	2.5	3.4	3.4
Dominican Republic	0.288	0.353	1.110	0.9	1.1	1.1
Central America	0.944	1.060	3.809	2.9	3.7	3.7
South America	1.385	1.608	6.382	4.9	6.1	6.2
Brazil	0.163	0.234	0.803	0.6	0.8	0.9
Colombia	0.503	0.629	2.251	1.7	2.3	2.3
Peru	0.240	0.249	1.138	0.9	1.0	1.0
Venezuela	0.098	0.091	0.653	0.5	0.4	0.4
Europe/Eurasia	3.954	3.671	12.797	9.9	13.0	13.0
European Union-28 2/	3.586	3.448	11.645	9.0	11.9	11.9
Other Europe 3/	0.159	0.133	0.614	0.5	0.7	0.7
FSU-12 4/	0.209	0.090	0.537	0.4	0.4	0.4
Russia	0.167	0.047	0.370	0.3	0.3	0.3
Middle East	1.422	1.588	5.480	4.2	5.5	5.5
Turkey	0.402	0.406	1.366	1.1	1.3	1.3
Saudi Arabia	0.313	0.433	1.296	1.0	1.2	1.2
Africa	0.728	0.830	3.315	2.6	3.2	3.2
North Africa	0.333	0.454	1.635	1.3	1.5	1.5
Egypt	0.162	0.159	0.776	0.6	0.8	0.8
Sub-Saharan Africa	0.394	0.377	1.680	1.3	1.7	1.7
Nigeria	0.127	0.100	0.396	0.3	0.4	0.4
Oceania	0.486	0.469	1.817	1.4	1.9	1.9
Trans-shipments via Canada 5/	0.000	0.002	0.000	0.0	0.0	0.0
<b>Total</b>	<b>36.265</b>	<b>41.428</b>	<b>129.726</b>	<b>100.0</b>	<b>134.0</b>	<b>136.0</b>

Total may not add due to rounding.

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

2/ The former EU-25 plus Romania and Bulgaria, which acceded in January 2007 and Croatia 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 U.S. Dept. of Agriculture using data from Census Bureau, U.S. Department of Commerce.

## Import Products

Agricultural imports in fiscal year 2017 are forecast at \$114.5 billion, up \$2.0 billion from the previous forecast and \$1.4 billion above the total value of imports in fiscal year 2016. The expected increases in total imports compared with the previous projections are largely due to increased imports of horticultural products, and to a lesser extent livestock and oilseed products.

Horticultural product imports are expected to reach a new record of \$54.4 billion in fiscal year 2017, which represents an upward adjustment of \$1.1 billion from the previous forecast. In fiscal year 2017, fresh fruit imports are expected to rise \$400 million, due to higher expected volumes when compared with the November report. Fresh vegetable imports are expected to exceed last quarter's expectations by \$300 million as volumes from major suppliers are expected to remain strong. Tree nuts are now projected \$100 million above the previous forecast and \$300 million above the record fiscal year 2016 due to expected growth in volumes. Increased expected shipments of fruit juice and malt beer have effectively adjusted each commodity's imported value up \$100 million from the previous forecast.

The fiscal year 2017 livestock and meats import forecast is raised \$200 million from the November forecast to \$15.8 billion. Beef is forecast up \$100 million to \$4.8 billion due to higher price and volume expectations. Live cattle imports are forecast up \$100 million to \$1.5 billion on greater volumes. Pork imports are forecast up \$100 million to \$1.6 billion as higher prices more than offset a reduction in volumes. Dairy imports are unchanged at \$3.5 billion.

Projected imports of oilseeds and products are increased \$300 million from the previous forecast to \$8.6 billion, due in part to higher expected volumes of imports of rapeseed oil and meal. Total grains and feed imports for fiscal 2017 are expected to rise \$100 million, as increased demand for grain products more than offset lower expected imports of corn.

U.S. imports of sugar and tropical products are forecast at \$23.0 billion in fiscal year 2017, a \$200 million upward adjustment from the previous forecast and \$800 million above fiscal year 2016. Cocoa products are expected to be worth \$5.3 billion due to larger than previously expected quantities imported. Sweeteners and products imports are forecast at \$4.8 billion, representing a \$100 million increase from the previous forecast, due to changes in expectations for products such as confections.

Table 5--U.S. agricultural imports: Value and volume by commodity, fiscal years 2016-17

Commodity	October - December		Fiscal year 2016	Forecast Fiscal year 2017	
	2016	2017		Nov.	Feb.
<b>VALUE</b>					
---Billion dollars---					
Livestock, dairy, & poultry	4.228	3.924	16.609	15.6	15.8
Livestock and meats	3.078	2.815	12.372	11.2	11.4
Cattle and calves	0.450	0.381	1.689	1.4	1.5
Swine	0.091	0.068	0.336	0.3	0.3
Beef and veal	1.203	1.093	5.380	4.7	4.8
Pork	0.447	0.418	1.706	1.5	1.6
Dairy products	0.876	0.901	3.371	3.5	3.5
Cheese	0.375	0.363	1.275	1.4	1.4
Grains and feed	2.828	2.852	10.935	10.8	10.9
Grain products	1.846	2.043	7.288	7.2	7.4
Oilseeds and products	1.945	2.181	8.453	8.3	8.6
Vegetable oils	1.222	1.444	5.420	5.4	5.6
Horticulture products	12.685	13.709	53.075	53.3	54.4
Fruits, fresh	2.411	2.808	11.228	11.3	11.7
Fruits, processed	1.196	1.240	5.123	5.1	5.2
Fruit juices	0.423	0.486	1.761	1.7	1.8
Nuts, whole and processed	0.788	0.938	2.607	2.8	2.9
Vegetables, fresh	1.879	1.879	7.999	7.6	7.9
Vegetables, processed	1.189	1.295	4.650	4.7	4.8
Wine	1.464	1.586	5.623	5.7	5.7
Malt beer	1.072	1.108	4.812	4.8	4.9
Essential oils	0.872	0.900	3.359	3.5	3.5
Cut flowers & nursery stock	0.397	0.430	1.813	1.8	1.8
Sugar & tropical products	5.260	5.690	22.217	22.8	23.0
Sweeteners & products	1.033	1.198	4.649	4.7	4.8
Confections	0.419	0.456	1.734	1.7	1.8
Cocoa and products	1.160	1.302	4.879	5.1	5.3
Coffee and products	1.433	1.502	5.934	6.2	6.2
Rubber, natural	0.328	0.329	1.306	1.3	1.3
Other imports 1/	0.443	0.483	1.819	1.8	1.8
Total agricultural imports	27.390	28.839	113.109	112.5	114.5
<b>VOLUME</b>					
---Million metric tons---					
Wine 2/	0.310	0.321	1.200	1.2	1.2
Malt beer 2/	0.852	0.891	3.859	3.8	3.9
Fruit juices 2/	1.079	1.195	4.514	4.4	4.5
Cattle and calves 3/	0.473	0.470	1.712	1.6	1.7
Swine 3/	1.519	1.414	5.775	5.9	5.8
Beef and veal	0.206	0.217	1.005	0.9	0.9
Pork	0.133	0.123	0.493	0.5	0.5
Fruits, fresh	2.572	2.678	11.642	11.6	11.9
Fruits, processed	0.440	0.431	1.924	1.9	1.9
Vegetables, fresh	1.702	1.825	7.181	7.1	7.2
Vegetables, processed	0.903	0.949	3.601	3.6	3.7
Vegetable oils	1.104	1.189	4.701	4.8	4.9
Cocoa and products	0.296	0.346	1.299	1.3	1.4
Coffee and products	0.387	0.396	1.638	1.6	1.6

Totals may not add due to rounding.

1/ Largely tobacco and planting seeds. 2/ Billion liters. 3/ Million head.

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

## Regional Imports

Regional imports from the Western Hemisphere are projected to rise \$1.1 billion from the previous forecast. This is largely due to increases in the expected supply from Mexico of horticultural products such as fresh fruits and vegetables, as well as tree nuts. Mexico is expected to remain the top supplier of agricultural products, at \$22.5 billion, followed by Canada, at \$21.8 billion. The value of Canadian agricultural products sold to the United States is expected to increase slightly, due to growing U.S. imports of oilseed products, such as rapeseed oil, and steady horticultural product and grain and feed sales. Caribbean agricultural sales to the United States are expected to rise by \$100 million due to expected increases of a variety of horticultural products.

Imports from South America are forecast up \$400 million from the previous forecast to \$13.7 billion. Brazil is expected to increase \$200 million from the previous forecast, due to increased sales of horticultural products, such as fruit juices. Peru's horticultural shipments, particularly of fresh fruit and vegetable products, motivate the \$200 million upward adjustment from the previous forecast.

Imports from Asia are forecast up \$400 million to \$17.6 billion from the previous projection. China, the largest supplier in the region, is projected to increase by \$100 million due to strong sales of processed vegetables and other horticultural products. Projections for imports from Vietnam were increased by \$200 million, largely due to increased volumes of tree nuts, particularly cashews, as well as a range of sugar and tropical products. The import forecast for Indonesia is up \$100 million due to stronger expected sales of palm oil.

Fiscal year 2017 imports from the European Union (EU) are expected to be \$100 million above the previous forecast, at \$21.0 billion. These projections reflect the EU's continued strength in supplying horticultural products to the United States. Therefore, the EU is expected to remain the third-largest supplier to the United States in the short run.

African imports are projected to rise \$100 million from the previous forecast, in large part due to higher volumes of cocoa beans from the Ivory Coast.

Table 6--U.S. agricultural imports: Value by region, fiscal years 2016-17

Region and country	October - December		Fiscal year 2016	Forecast	
	2016	2017		Fiscal year 2017	
				Nov.	Feb.
---Billion dollars---					
<b>VALUE</b>					
Western Hemisphere	15.006	15.948	63.161	62.6	63.7
Canada	5.346	5.455	21.461	21.7	21.8
Mexico	5.058	5.495	22.514	22.0	22.5
Central America	1.033	1.109	5.098	5.1	5.1
Costa Rica	0.332	0.361	1.596	1.6	1.6
Guatemala	0.431	0.467	1.877	1.9	1.9
Other Central America	0.269	0.281	1.625	1.6	1.6
Caribbean	0.101	0.118	0.565	0.5	0.6
South America	3.467	3.771	13.524	13.3	13.7
Argentina	0.436	0.413	1.419	1.3	1.3
Brazil	0.903	0.997	3.302	3.1	3.3
Chile	0.466	0.574	3.022	3.2	3.2
Colombia	0.593	0.649	2.291	2.3	2.3
Peru	0.589	0.677	1.742	1.7	1.9
Other South America	0.481	0.461	1.748	1.7	1.7
Europe and Eurasia	5.748	5.869	22.185	22.5	22.6
European Union-28	5.269	5.449	20.407	20.9	21.0
Other Europe	0.415	0.363	1.530	1.5	1.5
Asia	4.246	4.663	17.570	17.2	17.6
East Asia	1.465	1.590	5.791	5.6	5.7
China	1.083	1.153	4.249	4.1	4.2
Other East Asia	0.382	0.437	1.542	1.5	1.5
Southeast Asia	2.160	2.437	9.380	9.2	9.5
Indonesia	0.676	0.755	2.804	2.7	2.8
Malaysia	0.261	0.210	1.070	0.9	0.9
Thailand	0.522	0.566	2.299	2.3	2.3
Vietnam	0.411	0.569	1.996	2.1	2.3
Other Southeast Asia	0.290	0.338	1.210	1.2	1.2
South Asia	0.621	0.636	2.399	2.2	2.2
India	0.545	0.556	2.098	1.9	1.9
Oceania	1.448	1.258	6.087	6.5	6.3
Australia	0.915	0.716	3.386	3.7	3.6
New Zealand	0.498	0.506	2.590	2.8	2.7
Africa	0.635	0.778	2.747	2.8	2.9
Sub-Saharan	0.507	0.688	2.333	2.4	2.5
Ivory Coast	0.194	0.313	1.005	1.0	1.1
Middle East	0.332	0.343	1.446	1.4	1.4
Turkey	0.224	0.229	0.984	0.9	0.9
World total	27.390	28.839	113.109	112.5	114.5

Totals may not add due to rounding.

Sources: U.S. Dept. of Agriculture, 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	Average absolute forecast errors Fiscal 2014-16					Forecast accuracy Fiscal 2014-16					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
<b>Export value</b>	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Grains and feeds	16	15	8	3	2	-	-	-	X	X	40
Wheat	15	13	5	6	2	-	-	-	-	X	20
Rice	7	4	8	5	5	-	X	-	-	X	40
Coarse grains	51	45	22	6	1	-	-	-	-	X	20
Corn	50	44	22	5	1	-	-	-	-	X	20
Feeds and fodders	14	19	15	7	3	-	-	-	-	X	20
Oilseeds and products	14	9	5	2	1	-	-	X	X	X	60
Soybeans	12	11	6	4	1	-	-	-	X	X	40
Soybean meal	32	22	13	6	3	-	-	-	-	X	20
Soybean oil	25	26	13	8	4	-	-	-	-	X	20
Livestock, poultry, and dairy	9	9	6	5	1	-	-	-	-	X	20
Livestock products	5	6	4	4	1	X	-	X	X	X	80
Beef and veal	10	13	9	7	3	-	-	-	-	X	20
Pork	8	7	4	3	2	-	-	X	X	X	60
Beef and pork variety meats	4	6	7	10	3	X	-	-	-	X	40
Hides, skins, and furs	9	13	6	2	1	-	-	-	X	X	40
Poultry and products	6	8	5	5	2	-	-	X	-	X	40
Broiler meat	8	10	6	5	1	-	-	-	X	X	40
Dairy products	24	20	17	11	4	-	-	-	-	X	20
Tobacco, unmanufactured	7	7	7	7	5	-	-	-	-	X	20
Cotton	8	12	9	6	2	-	-	-	-	X	20
Planting seeds	11	11	11	11	3	-	-	-	-	X	20
Horticultural products	5	5	4	2	2	X	X	X	X	X	100
Fruits and vegetables, fresh	7	7	6	4	3	-	-	-	X	X	40
Fruits and veget., processed	6	6	4	3	2	-	-	X	X	X	60
Tree nuts	4	4	2	1	1	X	X	X	X	X	100
Sugar and tropical products	12	12	9	5	1	-	-	-	X	X	40
Major bulk products	13	14	7	2	1	-	-	-	X	X	40
Total agricultural exports	5	5	3	1	0	-	-	X	X	X	60
Average error & accuracy	14	13	8	5	2	14%	10%	28%	48%	100%	40
<b>Export volume</b>											
Wheat	8	9	9	7	3	-	-	-	-	X	20
Rice	8	7	8	5	5	-	-	-	-	X	20
Coarse grains	42	34	18	5	3	-	-	-	X	X	40
Corn	42	35	19	5	3	-	-	-	X	X	40
Feeds and fodders	14	18	17	13	9	-	-	-	-	-	0
Soybeans	13	8	6	4	1	-	-	-	X	X	40
Soybean meal	21	14	10	6	2	-	-	-	-	X	20
Soybean oil	29	33	7	7	3	-	-	-	-	X	20
Beef and veal	11	10	4	4	3	-	-	X	X	X	60
Pork	5	5	3	1	2	-	-	X	X	X	60
Beef and pork variety meats	7	6	12	13	4	-	-	-	-	X	20
Broiler meat	5	5	3	2	2	X	-	X	X	X	80
Tobacco, unmanufactured	22	22	14	14	22	-	-	-	-	-	0
Cotton	8	10	7	5	3	-	-	-	-	X	20
Major bulk products	13	12	6	2	2	-	-	-	X	X	40
Average error & accuracy	17	15	9	6	4	7%	0%	20%	47%	87%	32

- = Error exceeds 5 percent.

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

Country/region	Average absolute forecast errors Fiscal 2014-16					Forecast accuracy Fiscal 2014-16					Forecast accuracy Percent
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
<b>Export value</b>	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					
Asia	7	6	3	1	1	-	-	X	X	X	60
East Asia	8	8	4	1	2	-	-	X	X	X	60
Japan	9	9	5	3	1	-	-	-	X	X	40
China	14	11	4	4	4	-	-	X	X	X	60
Hong Kong	11	12	7	6	7	-	-	-	-	-	0
Taiwan	7	7	7	4	4	-	-	-	X	X	40
South Korea	19	20	17	11	2	-	-	-	-	X	20
Southeast Asia	9	7	5	2	3	-	-	-	X	X	40
Indonesia	19	13	9	4	1	-	-	-	X	X	40
Philippines	11	9	6	2	2	-	-	-	X	X	40
Malaysia	15	15	6	5	6	-	-	-	-	-	0
Thailand	21	21	21	6	4	-	-	-	-	X	20
Vietnam	8	8	6	14	18	-	-	-	-	-	0
South Asia	13	13	13	16	9	-	-	-	-	-	0
India	6	6	6	15	13	-	-	-	-	-	0
Western Hemisphere	3	3	2	3	1	X	X	X	X	X	100
North America	3	2	2	2	1	X	X	X	X	X	100
Canada	2	2	2	2	1	X	X	X	X	X	100
Mexico	5	5	4	3	2	-	X	X	X	X	80
Caribbean	5	5	3	4	2	-	-	X	X	X	60
Dominican Republic	14	14	7	6	6	-	-	-	-	-	0
Central America	20	20	20	7	5	-	-	-	-	X	20
South America	21	21	18	11	5	-	-	-	-	-	0
Brazil	40	42	34	24	7	-	-	-	-	-	0
Colombia	35	35	25	10	3	-	-	-	-	X	20
Peru	20	20	11	18	25	-	-	-	-	-	0
Venezuela	21	21	18	10	8	-	-	-	-	-	0
Europe and Eurasia	10	9	8	5	3	-	-	-	X	X	40
European Union-27	12	11	10	6	3	-	-	-	-	X	20
Other Europe	24	24	24	24	8	-	-	-	-	-	0
FSU-12	10	10	10	10	9	-	-	-	-	-	0
Russia	17	17	17	17	2	-	-	-	-	X	20
Middle East	12	12	10	7	3	-	-	-	-	X	20
Turkey	16	18	14	16	16	-	-	-	-	-	0
Saudi Arabia	10	10	10	5	5	-	-	-	-	-	0
Africa	30	28	18	11	4	-	-	-	-	X	20
North Africa	37	35	21	16	7	-	-	-	-	-	0
Egypt	38	34	19	16	13	-	-	-	-	-	0
Sub-Saharan Africa	23	21	15	8	4	-	-	-	-	X	20
Nigeria	11	8	5	5	11	-	-	X	X	-	40
Oceania	33	12	12	12	4	-	-	-	-	X	20
Average error and accuracy	16	15	11	9	6	7%	10%	22%	37%	59%	27

- = Error exceeds 5 percent.

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

Commodity	Average absolute forecast errors Fiscal 2014-16					Forecast accuracy Fiscal 2014-16					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
<b>Import value</b>	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Livestock, poultry, and dairy	9	9	6	7	2	-	-	-	-	X	20
Livestock and meats	10	9	7	8	2	-	-	-	-	X	20
Cattle and calves	21	12	7	6	3	-	-	-	-	X	20
Swine	18	18	14	6	5	-	-	-	-	-	0
Beef and veal	18	19	14	11	4	-	-	-	-	X	20
Pork	12	6	9	12	4	-	-	-	-	X	20
Dairy products	4	7	1	3	3	X	-	X	X	X	80
Cheese	5	4	7	8	4	-	X	-	-	X	40
Grains and feed	3	6	5	2	1	X	-	-	X	X	60
Grain products	2	2	3	2	2	X	X	X	X	X	100
Oilseeds and products	12	10	9	4	1	-	-	-	X	X	40
Vegetable oils	11	5	3	2	4	-	X	X	X	X	80
Horticulture products	3	2	4	4	1	X	X	X	X	X	100
Fruits, fresh	4	3	1	7	2	X	X	X	-	X	80
Fruits, preserved	4	6	7	7	2	X	-	-	-	X	40
Fruit juices	14	8	4	7	5	-	-	X	-	X	40
Nuts and preparations	14	7	5	5	5	-	-	-	-	-	0
Vegetables, fresh	5	6	9	3	1	X	-	-	X	X	60
Vegetables, processed	15	12	11	9	7	-	-	-	-	-	0
Wine	4	4	6	3	0	X	X	-	X	X	80
Malt beer	6	8	3	4	3	-	-	X	X	X	60
Essential oils	6	4	4	3	5	-	X	X	X	X	80
Cut flowers and nursery stock	4	4	4	2	2	X	X	X	X	X	100
Sugar and tropical products	24	18	13	6	2	-	-	-	-	X	20
Sweeteners and products	13	10	4	5	1	-	-	X	X	X	60
Confections	11	10	7	4	5	-	-	-	X	-	20
Cocoa and products	12	10	10	4	2	-	-	-	X	X	40
Coffee beans and products	21	15	12	9	4	-	-	-	-	X	20
Natural rubber	69	54	39	16	5	-	-	-	-	-	0
Other imports	28	33	26	13	5	-	-	-	-	-	0
Total agricultural imports	6	5	4	4	1	-	-	X	X	X	60
Average error and accuracy	13	10	8	6	3	29%	26%	35%	48%	81%	44
<b>Import volume</b>											
Wine (HL)	15	12	6	6	3	-	-	-	-	X	20
Malt beer (HL)	3	5	3	3	3	X	-	X	X	X	80
Fruit juices (HL)	11	12	5	5	3	-	-	X	X	X	60
Cattle and calves	7	6	4	7	1	-	-	X	-	X	40
Swine	10	6	6	5	1	-	-	-	X	X	40
Beef and veal	17	18	13	9	3	-	-	-	-	X	20
Pork	14	10	9	14	3	-	-	-	-	X	20
Fruits--fresh	4	4	1	2	1	X	X	X	X	X	100
Fruits--processed	8	10	10	10	5	-	-	-	-	X	20
Vegetables--fresh	3	3	3	2	1	X	X	X	X	X	100
Vegetables--processed	21	20	18	18	17	-	-	-	-	-	0
Vegetable oils	5	4	4	6	3	X	X	X	-	X	80
Cocoa and products	10	5	2	6	3	-	X	X	-	X	60
Coffee beans and products	6	6	3	2	2	-	-	X	X	X	60
Average error and accuracy	10	9	6	7	3	29%	29%	57%	43%	93%	50

- = Error exceeds 5 percent. HL = hectoliters.



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

Country/region	Average absolute forecast errors Fiscal 2014-16					Forecast accuracy Fiscal 2014-16					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
<b>Import value</b>	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Western Hemisphere	5	3	4	4	0	-	X	X	X	X	80
Canada	6	5	3	3	1	-	X	X	X	X	80
Mexico	3	3	2	4	1	X	X	X	X	X	100
Central America	11	10	12	8	3	-	-	-	-	X	20
Costa Rica	10	8	9	8	3	-	-	-	-	X	20
Guatemala	11	10	9	7	4	-	-	-	-	X	20
Other Central America	15	18	21	10	6	-	-	-	-	-	0
Caribbean	18	21	18	17	9	-	-	-	-	-	0
South America	8	5	6	4	2	-	-	-	X	X	40
Argentina	18	16	11	6	3	-	-	-	-	X	20
Brazil	13	9	11	10	3	-	-	-	-	X	20
Chile	7	5	7	6	3	-	X	-	-	X	40
Colombia	8	8	9	5	3	-	-	-	X	X	40
Other South America	87	85	54	56	58	-	-	-	-	-	0
Europe and Eurasia	3	2	1	2	1	X	X	X	X	X	100
European Union-27	3	3	1	1	1	X	X	X	X	X	100
Other Europe	10	7	5	11	6	-	-	X	-	-	20
Asia	18	15	13	6	2	-	-	-	-	X	20
East Asia	8	7	6	6	1	-	-	-	-	X	20
China	10	8	7	6	2	-	-	-	-	X	20
Other East Asia	3	3	2	5	2	X	X	X	-	X	80
Southeast Asia	16	14	9	4	1	-	-	-	X	X	40
Indonesia	21	17	10	3	3	-	-	-	X	X	40
Malaysia	34	31	22	8	3	-	-	-	-	X	20
Thailand	14	14	9	8	2	-	-	-	-	X	20
Other Southeast Asia	146	144	111	90	91	-	-	-	-	-	0
South Asia	37	33	48	19	10	-	-	-	-	-	0
India	40	36	43	20	10	-	-	-	-	-	0
Oceania	15	15	27	15	7	-	-	-	-	-	0
Australia	18	17	30	13	8	-	-	-	-	-	0
New Zealand	10	9	24	18	7	-	-	-	-	-	0
Africa	10	7	10	9	2	-	-	-	-	X	20
Sub-Saharan Africa	14	11	11	6	2	-	-	-	-	X	20
Ivory Coast	26	29	46	13	3	-	-	-	-	X	20
Middle East	8	10	23	4	5	-	-	-	X	-	20
Turkey	14	13	17	8	5	-	-	-	-	-	0
Average error & accuracy	19	18	18	12	8	11%	19%	19%	28%	67%	29

- = Error exceeds 5 percent.

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Pork & Hogs: Claire Mezoughem/FAS, 720-7715  
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Tyler Cozzens/FAS, 690-2993

Dairy Products: Paul Kiendl/FAS, 720-8870

#### Horticultural & Tropical Products:

Deciduous Fresh Fruit: Elaine Protzman/FAS, 720-5588  
Fresh Citrus: Reed Blauer/FAS, 720-0898

Vegetables & Preparations: Tony Halstead/FAS, 690-4620  
Tree Nuts: Tony Halstead/FAS, 690-4620

Sugar and Tropical Products: Reed Blauer/FAS, 720-0898  
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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->

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