



# Outlook for U.S. Agricultural Trade

## FY 2018 Exports Forecast at \$139.5 Billion; Imports at \$118.5 Billion

Fiscal year 2018 agricultural exports are projected at \$139.5 billion, down \$500 million from the November forecast, due to a 6-percent decline in oilseed and product exports that is only partially offset by increases in livestock, cotton, and grain exports. Oilseed exports are forecast down \$2.0 billion to \$31.1 billion as a result of a slow soybean export pace, mostly to China, and strong competition from Brazil. Livestock, poultry, and dairy exports are raised \$800 million to \$30.5 billion, led by higher forecasts for beef and pork products. Cotton is forecast up \$600 million to \$5.4 billion on substantially higher unit values. Grain and feed exports are forecast up \$300 million to \$29.7 billion, as gains for coarse grains, both corn and sorghum, more than offset a reduction for wheat. Horticultural product exports are unchanged at \$34.5 billion.

U.S. agricultural imports in fiscal year 2018 are forecast at \$118.5 billion, up \$1.5 billion from the November forecast. Most major product groups are forecast higher, led by horticultural product imports, which are up \$500 million to \$56.4 billion. The U.S. agricultural trade surplus is down \$2.0 billion to \$21.0 billion.

Table 1--U.S. agricultural trade, fiscal years 2012-18, year ending September 30

Item	2012	2013	2014	2015	2016	2017	Forecast fiscal year*	
							2018	
							Nov.	Feb.
<i>Billion dollars</i>								
Exports	135.9	141.1	152.3	139.8	129.6	140.5	140.0	139.5
Imports	103.4	103.9	109.3	114.2	113.0	119.1	117.0	118.5
Balance	32.5	37.3	43.1	25.5	16.6	21.3	23.0	21.0

\*Reflect forecasts in the February 8, 2018, *World Agricultural Supply and Demand Estimates* report.

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

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Approved by the  
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### *Favorable external conditions propel broad-based global economic growth*

Robust per capita world GDP growth of 2.0 percent in 2017 is expected to be surpassed with 2.2 percent growth in 2018—the fastest growth in global income since the post-financial-crisis rebound in 2010. This represents a broad-based pickup in economic activity across developed and developing countries. Correspondingly, after 2 years at less than 2 percent, brisk global trade volume growth of 6.1 percent in 2017 is expected to be followed by strong growth of 5.0 percent in 2018.

The U.S. dollar weakened against the currencies of many key trading partners in 2017 and is expected to generally trend weaker into 2018. This is largely a consequence of improved economic health in these countries, which has allowed their currencies to regain some of the value lost since 2014. The Eurozone experienced its strongest economic growth in a decade in 2017, and consumer and business sentiment suggests this strength will carry over into 2018. China's 2017 growth accelerated over the previous year for the first time since 2010, and India's per capita GDP growth is expected to outpace China's in 2018. An external environment marked by strong trade growth and higher commodity prices is also supporting growth in several other countries, particularly in the Asia-Pacific region. Additional upward pressure on the dollar from the relative pace of U.S. monetary policy normalization has abated as other developed countries pursue less expansionary policies.

Nevertheless, the dollar remains well above 2011-2014 levels, and the positive forces that supported a strong dollar since that time largely remain intact. Fiscal stimulus from tax and spending policies in an environment of very low unemployment may stimulate inflation. Such conditions would support more rapid increases in interest rates, driving up demand for dollars and thus the dollar's value.

Oil prices are expected to rise slightly in 2018 as improved global economic growth and strong world trade are expected to contribute to increasing consumption, while oil inventories in the United States and elsewhere have fallen. The U.S. Energy Information Administration (EIA) forecasts a modest rise in Brent crude spot prices, averaging \$58.28 per barrel for 2018, up from \$50.79 in 2017. U.S. crude oil production is forecast by EIA to reach a record high in 2018. Expectations are that 2018 oil prices will remain low compared with recent history and will continue to provide farmers, manufacturers, fertilizer producers, and farm product exporters a low-cost environment.

Per capita income growth is expected to be strong across North America in 2018. U.S. per capita GDP growth of 1.5 percent in 2017 is expected to increase to 1.9 percent in 2018 as the unemployment rate holds steady at a 17-year low of 4.1 percent. A strong labor market, with 13 months of job gains and increasing wages, contributes to an expected Canadian per capita GDP growth of 1.5 percent in 2018. Mexican income growth is expected to accelerate to 1.3 percent in 2018 from 1.1 percent in 2017, due to strong consumer spending growth even as monetary and fiscal policies tighten.

Per capita income growth at 2.2 percent in 2017 in the Eurozone is expected to be the strongest since the global financial crisis began in 2007, with sustained growth of 2.0 percent in 2018. Healthy private consumption growth is expected to continue due to strong employment gains and rising workforce participation.

Per capita income growth in Asia and Oceania is expected to be steady at 3.8 percent in 2018. Healthy per capita income growth in Japan of 1.6 percent in 2018 is expected to follow the country's strong 2017 growth of 2 percent, supported by a solid business investment outlook and support from expected global trade growth. However, sluggish wage growth in spite of a tight labor market is expected to limit domestic consumption. Income growth in China is expected to slow slightly to 6.0 percent in 2018, due to a slowdown in the real estate sector and expectations of declining investment growth and domestic demand as monetary policy is tightened. Income growth in India is expected to rise to 6.4 percent in 2018 as the economy adjusts to demonetization and domestic demand is driven by infrastructure spending and private consumption.

Latin America emerged from recession in 2017 with per capita economic growth at just 0.4 percent in 2017, which is expected to increase to only 1.5 percent in 2018. These are anemic growth rates for developing countries that reflect significant economic and political challenges throughout the region. Income growth is expected to reach 2.3 percent in Argentina in 2018, in response to economic reform and increasing private consumption due to growth in available credit and rising real wages. Inflation has remained high despite reforms, but the Argentinian peso, in real terms, has appeared to stabilize in response to a recent round of monetary policy tightening. Brazil's economy is expected to rebound similarly as household consumption picks up in an environment of low inflation and a recovering labor market. Unlike its neighbors, Venezuela remains in recession in 2018 for the fifth year. The country is not able to profit from higher oil prices as declining production, political unrest, and external debt repayment problems persist.

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.
	2017	2018	2017	2018	GDP	Population	Ag. exports
	Percent change		Growth rate		2014-16 Average		
<b>World</b>	<b>0.1</b>	<b>-3.7</b>	<b>2.0</b>	<b>2.2</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>
<b>NAFTA</b>	<b>-1.9</b>	<b>-3.3</b>	<b>1.5</b>	<b>1.9</b>	<b>26.4</b>	<b>6.7</b>	<b>28.3</b>
United States	--	--	1.5	2.1	22.4	4.5	--
Canada	-1.6	-3.3	2.2	1.5	2.4	0.5	16.1
Mexico	-2.3	-3.2	1.1	1.3	1.6	1.7	12.2
<b>Emerging Markets</b>	<b>0.1</b>	<b>-5.3</b>	<b>4.6</b>	<b>4.8</b>	<b>21.6</b>	<b>44.9</b>	<b>20.0</b>
Brazil	-9.8	2.1	0.4	1.5	3.1	2.8	0.9
Russia	-14.3	-2.2	1.7	1.9	2.2	2.0	0.3
India	-4.3	-6.1	5.0	6.4	3.2	17.4	0.8
Indonesia	-1.1	-1.8	4.1	4.3	1.3	3.6	1.7
China	2.2	-6.5	6.4	6.0	11.8	19.1	16.3
<b>Europe &amp; Central Asia</b>	<b>-1.3</b>	<b>-7.2</b>	<b>2.0</b>	<b>1.8</b>	<b>28.4</b>	<b>11.5</b>	<b>10.7</b>
Euro Zone	-1.2	-7.6	2.2	2.0	17.5	4.8	6.8
Ukraine	-4.2	-1.9	2.6	3.1	0.2	0.6	0.1
Turkey	11.0	-3.4	3.3	3.0	1.2	1.1	1.1
<b>Asia &amp; Oceania</b>	<b>1.8</b>	<b>-3.3</b>	<b>3.8</b>	<b>3.8</b>	<b>31.5</b>	<b>54.9</b>	<b>45.9</b>
Japan	4.8	-0.3	2.0	1.6	7.6	1.8	8.5
South Korea	-2.4	-4.9	2.7	2.6	1.7	0.7	4.5
Australia	-2.8	0.1	1.2	1.5	1.8	0.3	1.1
Other SE Asia 4/	1.4	-2.9	4.3	3.9	1.5	4.1	5.2
<b>Latin America</b>	<b>-2.8</b>	<b>5.5</b>	<b>0.4</b>	<b>1.5</b>	<b>8.0</b>	<b>8.6</b>	<b>21.5</b>
Argentina	-8.5	10.1	1.8	2.3	0.7	0.6	0.1
Other S. America 5/	-4.9	-1.3	1.0	2.0	1.2	1.6	3.0
<b>Middle East &amp; N. Africa</b>	<b>10.9</b>	<b>-4.4</b>	<b>0.6</b>	<b>1.5</b>	<b>5.2</b>	<b>6.9</b>	<b>5.3</b>
<b>Sub-Saharan Africa</b>	<b>-1.8</b>	<b>-6.0</b>	<b>-0.1</b>	<b>0.6</b>	<b>2.2</b>	<b>13.1</b>	<b>1.3</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 2018 grain and feed exports are forecast at \$29.7 billion, up \$300 million from the November forecast as gains for coarse grains, both corn and sorghum, more than offset a reduction for wheat. Corn is forecast up \$500 million to \$9.0 billion driven by larger volumes. The pace of sales and shipments to date remains brisk, and U.S. prices are expected to remain competitive until Brazil's second-crop corn comes onto the market. Sorghum is forecast up \$200 million to \$1.1 billion, reflecting robust sales and shipments to date. Exports for feeds and fodders are unchanged at \$7.5 billion.

Wheat is forecast at \$5.9 billion, down \$400 million primarily on smaller volumes. Export volume is down on increased market competition, especially from Argentina and Russia. Unit values are also down marginally on continued pressure from large competitor supplies. Rice is unchanged at \$1.9 billion as higher unit values offset lower volumes. Export volumes are down on weaker shipments to Venezuela and Africa.

Oilseed and products exports are forecast at \$31.1 billion, down \$2.0 billion. Soybean export value is down \$2.1 billion to \$22.0 billion. This year's slow export pace is the primary driver in the decline and is attributed almost entirely to China. A record Brazil harvest in 2017 resulted in larger exportable supplies being still available during the U.S. primary shipping season. The soybean oil export forecast is down slightly on lower volumes as strong U.S. domestic demand for fuel and food is limiting exportable supplies. In addition, competition from palm oil is intensifying.

Cotton is forecast at \$5.4 billion, up \$600 million. The volume is unchanged, and U.S. production is forecast up only slightly. However, unit values are up substantially on stronger world demand and in keeping with a sustained increase in prices on both spot and futures markets in a number of countries.

Livestock, poultry, and dairy exports are raised \$800 million to \$30.5 billion due largely to beef, pork, and livestock byproducts. Beef is forecast up \$400 million to \$6.7 billion on higher volumes and stronger prices. Pork is forecast up \$300 million to \$5.5 billion on strong global demand in key markets and slightly higher prices. Variety meats are forecast \$100 million higher to \$1.9 billion on robust demand and stronger prices. Forecasts for total poultry and dairy products are unchanged.

Horticultural products are unchanged at \$34.5 billion. Whole and processed tree nuts are unchanged at \$8.5 billion; top markets include Europe and China. Processed fruit and vegetables are unchanged at \$7.5 billion. Fresh fruit and vegetables are forecast unchanged at \$7.0 billion, with top markets including Canada, Europe, and Japan.

Table 3--U.S. agricultural exports: Value and volume by commodity, 2017-2018

Commodity	October -December		Fiscal year 2017	Forecast Fiscal year 2018	
	FY2017	FY2018		Nov.	Feb.
<b>VALUE</b>					
	---Billion dollars---				
Grains and feeds 1/	7.054	6.330	30.350	29.4	29.7
Wheat 2/	1.265	1.156	6.198	6.3	5.9
Rice	0.433	0.420	1.791	1.9	1.9
Coarse grains 3/	2.411	1.828	11.031	9.4	10.2
Corn	2.049	1.508	9.659	8.5	9.0
Feeds and fodders	1.860	1.888	7.178	7.5	7.5
Oilseeds and products 4/	14.254	11.767	32.891	33.1	31.1
Soybeans	11.936	9.541	23.977	24.1	22.0
Soybean meal 5/	0.995	1.009	3.896	4.0	4.0
Soybean oil	0.265	0.198	0.954	0.8	0.7
Livestock, poultry, and dairy	7.329	7.964	28.874	29.7	30.5
Livestock products	4.799	5.190	18.651	19.1	19.9
Beef and veal 6/	1.560	1.778	6.175	6.3	6.7
Pork 6/	1.368	1.454	5.227	5.2	5.5
Beef and pork variety meats 6/	0.496	0.454	1.803	1.8	1.9
Hides, skins, and furs	0.456	0.414	1.932	2.0	2.0
Poultry and products	1.197	1.382	4.899	5.0	5.0
Broiler meat 6/ 7/	0.716	0.844	3.011	3.0	3.1
Dairy products	1.333	1.392	5.324	5.6	5.6
Tobacco, unmanufactured	0.231	0.213	1.024	1.0	1.0
Cotton	1.018	0.996	5.850	4.8	5.4
Seeds	0.536	0.627	1.741	1.8	1.8
Horticultural products 8/	9.445	9.874	33.896	34.5	34.5
Fruits and vegetables, fresh	1.715	1.797	7.195	7.0	7.0
Fruits and vegetables, processed 8/	1.929	1.871	7.417	7.5	7.5
Tree nuts, whole and processed	2.967	3.309	8.118	8.5	8.5
Sugar and tropical products 9/	1.494	1.513	5.828	5.8	5.8
Major bulk products 10/	17.293	14.154	49.871	47.5	46.3
Total	41.364	39.291	140.471	140.0	139.5
<b>VOLUME</b>					
	--- Million metric tons ---				
Wheat 2/	5.697	4.928	28.034	26.4	24.9
Rice	0.997	0.821	4.080	3.8	3.6
Coarse grains 3/	13.363	10.326	62.039	54.1	58.4
Corn	11.602	8.883	55.434	48.5	51.5
Feeds and fodders	5.538	5.549	21.716	22.8	22.8
Soybeans	29.464	24.925	60.082	61.4	57.2
Soybean meal 5/	2.617	2.796	10.524	11.1	11.1
Soybean oil	0.324	0.235	1.160	1.0	0.9
Beef and veal 6/	0.245	0.259	0.934	1.0	1.0
Pork 6/	0.496	0.522	1.880	2.0	2.0
Beef and pork variety meats 6/	0.235	0.193	0.842	0.9	0.9
Broiler meat 6/ 7/	0.781	0.811	3.045	3.1	3.2
Tobacco, unmanufactured	0.035	0.028	0.150	0.2	0.2
Cotton	0.585	0.560	3.278	3.2	3.2
Major bulk products 10/	50.141	41.588	157.664	149.1	147.5

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

### **Outlook for Fiscal 2018**

Agricultural exports in fiscal 2018 are forecast at \$139.5 billion, \$500 million lower than the November forecast. Increases in livestock, cotton, and grain export projections partially offset reductions in the soybean forecast.

### **Asia**

Exports to China are projected at \$21.6 billion, \$1.0 billion lower than the November forecast. U.S. soybean exports to China during the first quarter were down 26 percent from a year ago, while Brazilian shipments more than tripled, buoyed by ample exportable supplies.

Exports to Japan are forecast up \$400 million from the November forecast to \$11.5 billion on the strength of beef and pork demand. Exports to Hong Kong are forecast up \$300 million to \$4.1 billion, primarily as a result of greater beef sales.

### **Western Hemisphere**

The North American forecast is unchanged at \$40.4 billion. Canada and Mexico remain the second and third largest U.S. agricultural markets, with export forecasts at \$21.2 billion and \$19.2 billion, respectively. Higher corn sales to Mexico were offset by declines in wheat and soybean shipments.

The forecast for South America is down \$300 million due to anemic wheat demand in Brazil, which reduces the export forecast for Brazil to \$700 million. U.S. wheat shipments to Brazil declined precipitously in October-December as Brazil turned to importing more supplies from Argentina.

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

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

Table 4--U.S. agricultural exports: Value by region, 2017-2018

Country and region 1/	October - December		Fiscal year 2017	Share of 2017 total	Forecast	
	FY2017	FY2018			Fiscal year 2018	
	-- \$ Billion --		Percent		Nov.	Feb.
<b>VALUE</b>						
Asia	21.554	19.629	63.361	45.1	61.9	61.6
East Asia	17.578	15.436	48.118	34.3	47.5	47.2
Japan	2.706	2.790	11.844	8.4	11.1	11.5
China	10.763	8.424	21.951	15.6	22.6	21.6
Hong Kong	1.475	1.648	4.044	2.9	3.8	4.1
Taiwan	0.965	0.883	3.404	2.4	3.3	3.3
South Korea	1.668	1.690	6.868	4.9	6.7	6.7
Southeast Asia	3.337	3.279	11.810	8.4	11.4	11.4
Indonesia	0.741	0.668	2.966	2.1	2.9	2.9
Philippines	0.662	0.627	2.627	1.9	2.5	2.5
Malaysia	0.208	0.229	0.904	0.6	0.9	0.9
Thailand	0.579	0.637	1.780	1.3	1.7	1.7
Vietnam	0.897	0.871	2.566	1.8	2.8	2.8
South Asia	0.638	0.914	3.432	2.4	3.0	3.0
India	0.331	0.445	1.506	1.1	1.5	1.5
Western Hemisphere	13.256	13.264	52.886	37.6	54.2	53.9
North America	9.685	9.808	38.986	27.8	40.4	40.4
Canada	4.974	5.107	20.362	14.5	21.2	21.2
Mexico	4.711	4.702	18.624	13.3	19.2	19.2
Caribbean	0.939	0.930	3.517	2.5	3.5	3.5
Dominican Republic	0.353	0.318	1.233	0.9	1.2	1.2
Central America	1.028	0.997	3.813	2.7	3.8	3.8
South America	1.605	1.529	6.570	4.7	6.5	6.2
Brazil	0.233	0.141	0.726	0.5	1.0	0.7
Colombia	0.628	0.602	2.251	1.6	2.5	2.5
Peru	0.248	0.286	1.188	0.8	1.1	1.1
Venezuela	0.091	0.049	0.441	0.3	0.3	0.3
Europe/Eurasia	3.667	3.579	12.614	9.0	12.8	12.8
European Union-28 2/	3.445	3.316	11.607	8.3	11.8	11.8
Other Europe 3/	0.133	0.136	0.622	0.4	0.7	0.7
FSU-12 4/	0.090	0.127	0.386	0.3	0.3	0.3
Russia	0.047	0.051	0.188	0.1	0.2	0.2
Middle East	1.595	1.557	6.099	4.3	5.8	5.8
Turkey	0.408	0.425	1.720	1.2	1.4	1.4
Saudi Arabia	0.431	0.293	1.590	1.1	1.4	1.4
Africa	0.826	0.734	3.618	2.6	3.6	3.6
North Africa	0.452	0.321	1.719	1.2	1.8	1.8
Egypt	0.159	0.157	0.776	0.6	0.8	0.8
Sub-Saharan Africa	0.375	0.413	1.899	1.4	1.8	1.8
Nigeria	0.099	0.093	0.501	0.4	0.5	0.5
Oceania	0.463	0.528	1.892	1.3	1.9	1.9
Transshipments via Canada 5/	0.002	0.000	0.002	0.0	0.0	0.0
<b>Total</b>	<b>41.364</b>	<b>39.291</b>	<b>140.471</b>	<b>100.0</b>	<b>140.0</b>	<b>139.5</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 3 Baltic Republics.

5/ Transshipments 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 2018 are forecast to be \$118.5 billion, \$1.5 billion above the November forecast but \$600 million below the total value of imports in fiscal year 2017. Expected increases in imports of horticultural and grains and feed products are largely responsible for the upward adjustment in the forecast, but higher projected supplies of animal products, sugar and tropical products, and oilseed product imports also contributed to the change.

In fiscal year 2018, horticultural product imports are expected to increase \$500 million from the previous forecast to \$56.4 billion, though this is nearly \$400 million below the fiscal year 2017 total. Fresh vegetable imports are expected to be \$200 million larger than previously expected due to larger volumes. The forecast for fresh fruit imports, however, has been adjusted downward by \$100 million due to slight reductions in expected volumes. Essential oil imports are expected to reach \$3.6 billion in fiscal year 2018, a \$100 million increase from the previous forecast, due to high levels of expected shipments after a strong first quarter. Imports of fruit juices and malt beer are also each projected to be \$100 million greater than the November forecast due to increased volumes.

Livestock, poultry, and dairy imports are stable at \$15.8 billion as increases in beef and live swine offset fractional declines in pork and live cattle and calves. Beef is raised \$100 million to \$5.0 billion as strong prices more than offset lower volumes. Cattle and calves are lowered \$100 million to \$1.6 billion as ample supplies pressure prices. Poultry and products are forecast slightly higher, while dairy products are unchanged.

U.S. imports of sugar and tropical products are forecast to be worth \$23.5 billion in fiscal year 2018, a \$200 million upward adjustment from the previous forecast but \$400 million below fiscal year 2017. Coffee products are expected to be worth \$6.5 billion due to higher unit values than previously expected. Natural rubber imports are expected to be \$200 million higher than the November report, due to rising projected unit values and volumes. Cocoa product imports, however, are now projected to be worth \$5.0 billion, a \$200 million decrease from the previous forecast, due to lower volumes.

Imports of grains and feed products are forecast to grow by \$300 million from the previous forecast to \$11.6 billion, due to projected increases in U.S. demand for processed grain products, as well as for wheat and oats. Total oilseed and product imports for fiscal 2018 are expected to increase to \$9.0 billion, a \$200 million increase from November, due in part to stronger than expected volumes of vegetable oil shipments.

Table 5--U.S. agricultural imports: Value and volume by commodity, fiscal years 2017-18

Commodity	October - December		Fiscal year 2017	Forecast Fiscal year 2018	
	FY2017	FY2018		Nov.	Feb.
<b>VALUE</b>					
---Billion dollars---					
Livestock, dairy, & poultry	3.922	4.307	16.133	15.8	15.8
Livestock and meats	2.813	3.191	12.134	11.9	11.9
Cattle and calves	0.390	0.440	1.488	1.7	1.6
Swine	0.067	0.084	0.325	0.3	0.3
Beef and veal	1.093	1.234	5.124	4.9	5.0
Pork	0.418	0.456	1.771	1.6	1.6
Dairy products	0.901	0.920	3.252	3.2	3.2
Cheese	0.363	0.374	1.168	1.3	1.3
Grains and feed	2.847	3.233	11.334	11.3	11.6
Grain products	2.042	2.213	7.765	7.7	7.8
Oilseeds and products	2.178	2.370	9.325	8.8	9.0
Vegetable oils	1.442	1.543	6.242	6.0	6.1
Horticulture products	13.707	14.605	56.753	55.9	56.4
Fruits, fresh	2.809	2.856	12.688	12.4	12.3
Fruits, processed	1.240	1.307	5.121	5.2	5.2
Fruit juices	0.487	0.516	1.938	1.8	1.9
Nuts, whole and processed	0.938	0.907	3.198	3.2	3.2
Vegetables, fresh	1.878	2.130	7.692	7.7	7.9
Vegetables, processed	1.294	1.335	5.048	5.1	5.1
Wine	1.585	1.646	6.070	6.0	6.0
Malt beer	1.108	1.204	4.970	4.9	5.0
Essential oils	0.900	1.030	3.559	3.5	3.6
Cut flowers & nursery stock	0.430	0.455	1.914	1.9	1.9
Sugar & tropical products	5.691	5.682	23.876	23.3	23.5
Sweeteners & products	1.201	1.178	4.666	4.7	4.7
Confections	0.456	0.473	1.770	1.7	1.7
Cocoa and products	1.301	1.063	5.152	5.2	5.0
Coffee and products	1.502	1.503	6.618	6.4	6.5
Rubber, natural	0.329	0.397	1.700	1.6	1.8
Other imports 1/	0.483	0.506	1.718	1.8	1.8
<b>Total agricultural imports</b>	<b>28.828</b>	<b>30.703</b>	<b>119.140</b>	<b>117.0</b>	<b>118.5</b>
<b>VOLUME</b>					
---Million metric tons---					
Wine 2/	0.321	0.338	1.287	1.3	1.3
Malt beer 2/	0.891	0.939	3.974	3.9	4.0
Fruit juices 2/	1.193	1.274	4.629	4.5	4.7
Cattle and calves 3/	0.474	0.536	1.766	1.9	1.9
Swine 3/	1.412	1.395	5.616	5.6	5.6
Beef and veal	0.217	0.228	1.005	1.0	1.0
Pork	0.123	0.127	0.489	0.5	0.5
Fruits, fresh	2.678	2.710	12.182	12.2	12.1
Fruits, processed	0.426	0.429	1.811	1.9	1.9
Vegetables, fresh	1.825	1.992	7.360	7.3	7.5
Vegetables, processed	0.949	1.008	3.819	3.9	3.9
Vegetable oils	1.189	1.226	5.919	5.1	5.5
Cocoa and products	0.346	0.287	1.495	1.5	1.4
Coffee and products	0.396	0.381	1.692	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 increase by \$1.4 billion from the previous forecast. Mexico is expected to remain the largest supplier of agricultural goods, followed by Canada. Mexico's projected sales total is now \$24.0 billion, \$400 million above the November forecast, due to increases in expected imports of fresh vegetables and livestock and meat products. The value of Canadian agricultural products sold to the United States is expected to increase by \$400 million to \$22.8 billion, due to upward adjustments to U.S. imports of processed grain products and miscellaneous horticultural products, such as honey.

Imports from South America are projected to equal the November forecast at \$13.3 billion, a \$600 million drop from fiscal year 2017. Chile's imports are expected to decrease \$100 million from the previous forecast due to lower expected sales of horticultural products, such as fresh fruits. However, this reduction to the region is offset by Colombia's sugar and tropical product shipments, particularly of coffee products, that motivate a \$100 million upward adjustment from the previous forecast.

Fiscal year 2018 imports from the EU are projected to increase from the last projection by \$600 million to \$21.8 billion, and therefore the group of member states is expected to remain the third-largest supplier to the United States. The increase is due to an expected rise in horticultural products, such as wine and essential oils, as well as a rise in processed grain product imports.

U.S. imports from Oceania are expected to increase \$200 million from the previous forecast in fiscal year 2018. Projections from Australia are raised by \$100 million due to adjustments in the projected volume of beef and other meat products. Imports from New Zealand are forecast at \$2.6 billion, a \$100 million increase, due to a rise in expected sales of beef.

Imports from Asia are forecast up \$300 million from the previous projection to \$19.0 billion. These adjusted expectations are due to increases in supplies from Southeast Asia, as opposed to those from China, which is the largest supplier in the region. Projections for imports from Indonesia, for instance, were increased by \$200 million, primarily due to increased sales of natural rubber.

Imports from Africa are \$200 million lower than the previous projection, due to reduced shipments from the Ivory Coast, particularly for cocoa products. Projected imports from the Middle East remain unchanged.

Table 6--U.S. agricultural imports: Value by region, fiscal years 2017-18

Region and country	October - December		Fiscal year 2017	Forecast Fiscal year 2018	
	FY2017	FY2018		Nov.	Feb.
---Billion dollars---					
<b>VALUE</b>					
Western Hemisphere	15.936	16.627	65.971	65.3	66.7
Canada	5.443	5.792	21.984	22.4	22.8
Mexico	5.496	5.994	24.070	23.6	24.0
Central America	1.109	1.087	5.454	5.4	5.4
Costa Rica	0.361	0.372	1.607	1.6	1.6
Guatemala	0.467	0.439	2.097	2.1	2.1
Other Central America	0.281	0.277	1.750	1.7	1.7
Caribbean	0.118	0.141	0.588	0.6	0.6
South America	3.770	3.611	13.874	13.3	13.3
Argentina	0.413	0.427	1.362	1.3	1.3
Brazil	0.996	0.970	3.327	3.2	3.2
Chile	0.574	0.471	2.993	2.9	2.8
Colombia	0.649	0.668	2.591	2.4	2.5
Peru	0.677	0.685	1.977	1.9	1.9
Other South America	0.461	0.390	1.625	1.6	1.6
Europe and Eurasia	5.848	6.613	22.818	22.8	23.4
European Union-28	5.448	6.152	21.371	21.2	21.8
Other Europe	0.363	0.411	1.448	1.5	1.5
Asia	4.663	4.992	19.694	18.7	19.0
East Asia	1.591	1.629	6.119	6.0	6.0
China	1.153	1.188	4.465	4.4	4.4
Other East Asia	0.437	0.442	1.654	1.6	1.6
Southeast Asia	2.436	2.633	10.728	10.2	10.4
Indonesia	0.755	0.878	3.587	3.2	3.4
Malaysia	0.210	0.237	0.964	0.9	0.9
Thailand	0.565	0.633	2.387	2.4	2.4
Vietnam	0.569	0.570	2.401	2.4	2.4
Other Southeast Asia	0.338	0.315	1.390	1.3	1.3
South Asia	0.636	0.730	2.847	2.5	2.6
India	0.556	0.636	2.525	2.2	2.3
Oceania	1.258	1.394	5.812	5.6	5.8
Australia	0.715	0.858	3.103	3.1	3.2
New Zealand	0.506	0.503	2.592	2.5	2.6
Africa	0.780	0.677	3.295	3.0	2.8
Sub-Saharan	0.690	0.587	2.935	2.6	2.4
Ivory Coast	0.313	0.131	1.182	1.2	1.0
Middle East	0.343	0.399	1.366	1.4	1.4
Turkey	0.229	0.279	0.888	0.9	0.9
World total	28.828	30.703	119.140	117.0	118.5

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 2015-17					Forecast accuracy Fiscal 2015-17					Forecast accuracy 1/
	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	5	4	6	5	1	X	X	-	X	X	80
Wheat	22	11	4	1	2	-	-	X	X	X	60
Rice	5	4	7	5	4	X	X	-	-	X	60
Coarse grains	5	8	9	7	1	-	-	-	-	X	20
Corn	3	5	8	7	2	X	-	-	-	X	40
Feeds and fodders	6	7	13	10	2	-	-	-	-	X	20
Oilseeds and products	7	8	7	6	2	-	-	-	-	X	20
Soybeans	10	11	8	7	3	-	-	-	-	X	20
Soybean meal	10	8	7	5	3	-	-	-	-	X	20
Soybean oil	12	7	7	8	7	-	-	-	-	-	0
Livestock, poultry, and dairy	14	11	4	3	1	-	-	X	X	X	60
Livestock products	13	10	4	3	1	-	-	X	X	X	60
Beef and veal	13	12	7	5	3	-	-	-	X	X	40
Pork	8	10	6	4	2	-	-	-	X	X	40
Beef and pork variety meats	8	6	6	11	5	-	-	-	-	X	20
Hides, skins, and furs	24	19	6	3	1	-	-	-	X	X	40
Poultry and products	10	12	6	5	2	-	-	-	-	X	20
Broiler meat	10	12	6	5	2	-	-	-	-	X	20
Dairy products	21	14	9	5	3	-	-	-	-	X	20
Tobacco, unmanufactured	8	8	8	6	6	-	-	-	-	-	0
Cotton	12	14	11	9	2	-	-	-	-	X	20
Planting seeds	7	7	9	4	4	-	-	-	X	X	40
Horticultural products	7	7	4	2	1	-	-	X	X	X	60
Fruits and vegetables, fresh	8	8	5	3	3	-	-	X	X	X	60
Fruits and veget., processed	6	6	4	2	1	-	-	X	X	X	60
Tree nuts	15	15	10	4	2	-	-	-	X	X	40
Sugar and tropical products	5	5	4	3	2	X	X	X	X	X	100
Major bulk products	5	8	7	6	2	-	-	-	-	X	20
Total agricultural exports	5	3	3	2	1	-	X	X	X	X	80
Average error & accuracy	10	9	7	5	3	14%	14%	28%	48%	93%	39
<b>Export volume</b>											
Wheat	18	10	7	3	2	-	-	-	X	X	40
Rice	4	6	8	6	5	X	-	-	-	-	20
Coarse grains	5	7	8	5	2	X	-	-	-	X	40
Corn	5	6	8	6	2	X	-	-	-	X	40
Feeds and fodders	2	7	12	10	3	X	-	-	-	X	40
Soybeans	12	9	8	7	3	-	-	-	-	X	20
Soybean meal	6	2	3	4	2	-	X	X	X	X	80
Soybean oil	9	8	6	6	5	-	-	-	-	X	20
Beef and veal	9	8	2	3	1	-	-	X	X	X	60
Pork	5	5	1	3	2	X	X	X	X	X	100
Beef and pork variety meats	7	5	10	11	5	-	-	-	-	-	0
Broiler meat	7	7	4	2	2	-	-	X	X	X	60
Tobacco, unmanufactured	25	25	27	17	25	-	-	-	-	-	0
Cotton	11	11	9	8	2	-	-	-	-	X	20
Major bulk products	5	6	6	5	2	-	-	-	X	X	40
Average error & accuracy	9	8	8	6	4	33%	13%	27%	40%	80%	39

1/ Percent of forecasts with errors less than or equal to 5 percent, as denoted by an X

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

Country/region	Average absolute forecast errors Fiscal 2015-17					Forecast accuracy Fiscal 2015-17					Forecast accuracy 1/ 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	4	5	4	2	-	X	-	X	X	60
East Asia	7	4	4	3	2	-	X	X	X	X	80
Japan	10	7	4	3	2	-	-	X	X	X	60
China	7	4	5	4	3	-	X	X	X	X	80
Hong Kong	12	10	8	9	7	-	-	-	-	-	0
Taiwan	5	5	4	4	4	-	-	X	X	X	60
South Korea	9	8	7	5	5	-	-	-	X	X	40
Southeast Asia	7	7	8	7	4	-	-	-	-	X	20
Indonesia	12	11	16	11	5	-	-	-	-	X	20
Philippines	7	10	10	8	5	-	-	-	-	X	20
Malaysia	5	5	1	6	7	-	-	X	-	-	20
Thailand	11	11	11	7	5	-	-	-	-	-	0
Vietnam	12	12	8	7	9	-	-	-	-	-	0
South Asia	22	22	21	18	6	-	-	-	-	-	0
India	10	10	8	15	9	-	-	-	-	-	0
Western Hemisphere	2	1	0	1	0	X	X	X	X	X	100
North America	3	3	2	2	1	X	X	X	X	X	100
Canada	4	4	3	3	3	X	X	X	X	X	100
Mexico	4	3	2	2	1	X	X	X	X	X	100
Caribbean	5	5	5	4	2	X	X	X	X	X	100
Dominican Republic	10	10	16	13	8	-	-	-	-	-	0
Central America	7	7	7	5	2	-	-	-	X	X	40
South America	9	6	10	7	4	-	-	-	-	X	20
Brazil	8	21	25	25	21	-	-	-	-	-	0
Colombia	16	16	12	4	3	-	-	-	X	X	40
Peru	23	19	15	12	14	-	-	-	-	-	0
Venezuela	26	26	27	20	9	-	-	-	-	-	0
Europe and Eurasia	3	1	2	1	1	X	X	X	X	X	100
European Union-27	2	2	2	1	1	X	X	X	X	X	100
Other Europe	8	8	8	12	12	-	-	-	-	-	0
FSU-12	15	15	15	9	15	-	-	-	-	-	0
Russia	23	23	23	23	5	-	-	-	-	-	0
Middle East	6	6	4	2	0	-	-	X	X	X	60
Turkey	10	12	18	19	24	-	-	-	-	-	0
Saudi Arabia	12	12	12	8	6	-	-	-	-	-	0
Africa	21	15	12	10	3	-	-	-	-	X	20
North Africa	22	18	14	13	7	-	-	-	-	-	0
Egypt	25	17	13	7	3	-	-	-	-	X	20
Sub-Saharan Africa	20	15	11	8	4	-	-	-	-	X	20
Nigeria	18	22	25	25	26	-	-	-	-	-	0
Oceania	6	6	6	2	2	-	-	-	X	X	40
Average error and accuracy	11	10	10	8	6	17%	24%	32%	41%	59%	35

1/ Percent of forecasts with errors less than or equal to 5 percent, as denoted by an X

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

Commodity	Average absolute forecast errors Fiscal 2015-17					Forecast accuracy Fiscal 2015-17					Forecast accuracy 1/
	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	10	8	5	3	1	-	-	-	X	X	40
Livestock and meats	13	11	7	5	2	-	-	-	-	X	20
Cattle and calves	25	18	2	2	2	-	-	X	X	X	60
Swine	10	9	7	8	9	-	-	-	-	-	0
Beef and veal	21	15	10	7	3	-	-	-	-	X	20
Pork	11	10	13	11	3	-	-	-	-	X	20
Dairy products	4	7	3	3	2	X	-	X	X	X	80
Cheese	11	9	13	15	6	-	-	-	-	-	0
Grains and feed	3	3	2	2	1	X	X	X	X	X	100
Grain products	3	4	2	2	2	X	X	X	X	X	100
Oilseeds and products	12	9	8	6	2	-	-	-	-	X	20
Vegetable oils	11	6	5	4	4	-	-	-	X	X	40
Horticulture products	4	4	3	3	2	X	X	X	X	X	100
Fruits, fresh	5	4	3	5	3	-	X	X	-	X	60
Fruits, preserved	7	6	4	2	1	-	-	X	X	X	60
Fruit juices	13	14	10	4	5	-	-	-	X	-	20
Nuts and preparations	17	15	11	7	5	-	-	-	-	-	0
Vegetables, fresh	6	6	8	3	2	-	-	-	X	X	40
Vegetables, processed	5	4	4	2	1	X	X	X	X	X	100
Wine	5	5	6	3	1	X	X	-	X	X	80
Malt beer	2	3	1	2	2	X	X	X	X	X	100
Essential oils	6	3	4	3	2	-	X	X	X	X	80
Cut flowers and nursery stock	5	5	4	4	2	-	-	X	X	X	60
Sugar and tropical products	12	12	13	4	2	-	-	-	-	X	20
Sweeteners and products	5	5	6	3	2	-	X	-	X	X	60
Confections	10	6	6	3	4	-	-	-	X	X	40
Cocoa and products	7	6	7	5	1	-	-	-	-	X	20
Coffee beans and products	9	10	14	8	4	-	-	-	-	X	20
Natural rubber	53	50	36	11	6	-	-	-	-	-	0
Other imports	19	17	15	7	5	-	-	-	-	X	20
Total agricultural imports	5	5	4	3	1	-	-	X	X	X	60
Average error and accuracy	11	9	8	5	3	23%	29%	39%	58%	84%	46
<b>Import volume</b>											
Wine (HL)	8	5	5	3	1	-	X	X	X	X	80
Malt beer (HL)	2	3	1	2	2	X	X	X	X	X	100
Fruit juices (HL)	3	5	2	2	2	X	X	X	X	X	100
Cattle and calves	11	12	4	3	2	-	-	X	X	X	60
Swine	10	10	7	5	2	-	-	-	-	X	20
Beef and veal	10	13	12	6	1	-	-	-	-	X	20
Pork	12	10	5	7	2	-	-	-	-	X	20
Fruits--fresh	3	3	2	1	1	X	X	X	X	X	100
Fruits--processed	8	6	5	5	2	-	-	X	X	X	60
Vegetables--fresh	7	6	5	3	2	-	-	-	X	X	40
Vegetables--processed	4	4	3	2	0	X	X	X	X	X	100
Vegetable oils	9	9	8	7	6	-	-	-	-	-	0
Cocoa and products	12	10	5	7	0	-	-	X	-	X	40
Coffee beans and products	5	7	5	2	4	-	-	X	X	X	60
Average error and accuracy	7	7	5	4	2	29%	36%	64%	64%	93%	57

1/ Percent of forecasts with errors less than or equal to 5 percent, as denoted by an X

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

Country/region	Average absolute forecast errors Fiscal 2015-17					Forecast accuracy Fiscal 2015-17					Forecast accuracy 1/
	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	4	4	3	1	X	X	X	X	X	100
Canada	8	6	5	2	1	-	-	-	X	X	40
Mexico	4	6	4	3	2	X	-	X	X	X	80
Central America	7	6	8	4	2	-	-	-	X	X	40
Costa Rica	6	6	6	2	1	-	-	-	X	X	40
Guatemala	9	9	9	6	3	-	-	-	-	X	20
Other Central America	13	11	11	5	8	-	-	-	-	-	0
Caribbean	18	20	10	4	11	-	-	-	X	-	20
South America	5	6	7	4	1	-	-	-	X	X	40
Argentina	7	10	5	5	4	-	-	-	X	X	40
Brazil	9	10	11	7	2	-	-	-	-	X	20
Chile	3	5	6	3	2	X	-	-	X	X	60
Colombia	8	11	12	7	4	-	-	-	-	X	20
Other South America	32	30	4	4	7	-	-	X	X	-	40
Europe and Eurasia	2	2	1	1	0	X	X	X	X	X	100
European Union-27	3	3	1	1	1	X	X	X	X	X	100
Other Europe	9	6	2	4	4	-	-	X	X	X	60
Asia	12	12	9	4	3	-	-	-	X	X	40
East Asia	7	8	3	2	2	-	-	X	X	X	60
China	8	9	4	2	2	-	-	X	X	X	60
Other East Asia	6	6	4	5	4	-	-	X	X	X	60
Southeast Asia	11	12	7	5	3	-	-	-	X	X	40
Indonesia	16	16	9	8	4	-	-	-	-	X	20
Malaysia	21	23	14	6	4	-	-	-	-	X	20
Thailand	6	7	3	4	2	-	-	X	X	X	60
Other Southeast Asia	49	49	23	12	7	-	-	-	-	-	0
South Asia	20	20	38	11	7	-	-	-	-	-	0
India	32	32	39	12	9	-	-	-	-	-	0
Oceania	38	33	38	7	5	-	-	-	-	X	20
Australia	37	30	39	13	9	-	-	-	-	-	0
New Zealand	31	26	33	18	9	-	-	-	-	-	0
Africa	19	19	18	12	5	-	-	-	-	X	20
Sub-Saharan Africa	11	12	12	13	5	-	-	-	-	X	20
Ivory Coast	20	24	50	14	4	-	-	-	-	X	20
Middle East	5	8	18	5	6	X	-	-	-	-	20
Turkey	6	9	9	7	8	-	-	-	-	-	0
Average error & accuracy	14	14	13	6	4	17%	8%	28%	53%	72%	36

1/ Percent of forecasts with errors less than or equal to 5 percent, as denoted by an X

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Yoonhee Macke/FAS, 690-4199

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Rice: Nathan Childs/ERS, 694-5292

Rachel Trego/FAS, 720-1073

Oilseeds: Mark Ash/ERS, 694-5289

Bill George/FAS, 720-6234

Cotton: James Johnson/FAS, 690-1546

Leslie Meyer/ERS, 694-5307

#### Livestock, Poultry & Dairy Products:

Beef & Cattle: Tyler Cozzens/FAS, 690-2993

Pork & Hogs: Lindsay Kuberka/FAS, 644-4650

Poultry: Sean Ramos/ERS, 694-5443

Claire Mezoughem/FAS, 720-7715

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-trade/us-agricultural-trade.aspx>

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