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Outlook for U.S. Agricultural Trade

FY 2014 Export Forecast Raised \$6.9 Billion to a Record \$149.5 Billion

The fiscal year 2014 forecast for agricultural exports is revised up from the February estimate by \$6.9 billion to a record \$149.5 billion. The forecast for grain and feed exports is boosted \$4.5 billion to \$35.8 billion due to higher prices for wheat and greater volumes and prices for corn and feeds and fodders. The corn export forecast is raised \$2.1 billion to \$10.7 billion on strong foreign demand and diminished competition, especially from Argentina. Oilseeds and product exports are forecast at a record \$33.8 billion, up \$2.4 billion, driven by larger volume and higher prices for soybean and soybean meal exports. The soybean export forecast is raised \$1.8 billion to \$23.5 billion based on record sales to China. The export forecast for livestock, poultry, and dairy is raised by \$600 million to a record \$32.2 billion, with increases in dairy and beef more than offsetting declines in pork and poultry. The horticultural product export forecast is lowered \$400 million to \$34.1 billion, but still forecast at a record high.

U.S. agricultural imports for fiscal year 2014 are forecast at a record \$110.5 billion, up \$500 million from February's estimate. Imports are expected to be 6.4 percent greater than in fiscal 2013. The forecast for the U.S. agricultural trade surplus in fiscal 2014 is up \$6.3 billion from February to \$39.0 billion, its second highest ever.

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

Item	2008	2009	2010	2011	2012	2013	Forecast fiscal year	
							2014	
							Feb.	May
<i>Billion dollars</i>								
Exports	114.9	96.3	108.5	137.4	135.8	140.9	142.6	149.5
Imports	79.3	73.4	79.0	94.5	103.4	103.8	110.0	110.5
Balance	35.6	22.9	29.5	42.9	32.4	37.1	32.7	39.0

Reflects forecasts in the May 9, 2014, *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
World Agricultural
Outlook Board.

World Growth to be up in 2014; U.S. Dollar Steady

World growth, estimated at 2.0 percent in 2013, is expected to rise to 2.8 percent in 2014, despite a weak first quarter. Trade growth of 2.6 percent in 2013 is expected to rise to 4.1 percent in 2014, supporting world growth. Asian GDP growth, estimated at 4.2 percent in 2013, is slated to slow to 4.0 percent in 2014.

China and other Asian economies, in pursuing policies of higher domestic consumption, have become less export dependent, leading to lower trend growth than in 2000-09. In the first quarter of 2014, exports shrank in leading Asian economies compared to the previous year. The Chinese central bank tightened credit policy in 2013 due to concern that the booming commercial and residential real estate markets would boost inflation. This tight credit policy meant that consumer spending did not grow fast enough to fully offset falling exports. As a result, China is expecting a slowdown in GDP growth to 7.0 percent in 2014. Japan has had very accommodating monetary policy for some time, and experienced a very strong (almost 6 percent) annualized jump in consumer spending in the first quarter while exports grew slowly. This growth in consumer spending is expected to abate as higher taxes on consumption began on April 1. Some economies in Asia are slated to see slower growth, such as the storm-ravaged Philippines. South Korea and Vietnam are expecting stronger growth in 2014.

North American and European economies will boost world growth in 2014, as credit conditions ease in Europe. North American growth is expected to move up in 2014 as the U.S. economy speeds up from a severe winter. The Latin American growth slowdown in 2014 comes as higher growth prospects for smaller Latin American economies do not fully offset a recession in Argentina and slow growth in Brazil. Europe is expected to recover from 2013's 0.1-percent growth to 1.6 percent in 2014. World trade growth's acceleration in 2014 comes as a speed-up of North American and European GDP growth boosts imports from other areas.

The dollar is projected to be flat in 2014 on top of 2013's 0.7-percent appreciation. Dollar appreciation over the last several years was the result of the belief in financial markets that U.S. energy-supply growth would boost U.S. corporate profit growth. In addition, U.S. financial markets were seen as a place to avoid the economic and political turmoil of some emerging economies. The recent U.S. stock market boom is a reflection of those perceptions. Nevertheless, the continued relatively low value of a slowly appreciating dollar, lower domestic energy prices, and higher growth in Europe and North America will further support U.S. farm and manufacturing export growth in 2014. The stronger U.S. economy in 2014 will lift U.S. import demand even as U.S. exports rise, providing a boost to world growth beyond North America.

Low U.S. energy prices and increasingly available credit make the U.S. agricultural export trade outlook promising in 2014. High transport costs for moving newly found fossil fuels to ports means that expanding supplies of natural gas and crude oil have made these energy supplies available at a discount on U.S. markets. The relatively low cost of U.S. energy is a source of absolute advantage to domestic farm and manufacturing exporters.

The main risk to higher world growth in 2014 is a BRIC (Brazil, Russia, India, and China) growth slowdown from overly harsh credit tightening. However, most analysts regard that risk as of a low probability in 2014.

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

Region/country	Share of world GDP (2012)	Income		Real exchange rate 2/		Prices	
		2013 Growth rate	2014	2013	2014	2013 Growth rate	2014
World (U.S. trade-weighted)	100.0	2.1	2.8	0.7	0.1	2.4	2.4
NAFTA	29.6	1.9	2.5	0.0	0.4	1.6	2.0
Canada	2.3	2.0	2.2	3.5	4.4	1.0	1.4
United States	25.4	1.9	2.5	0.0	0.0	1.5	1.9
Mexico	1.9	1.3	3.3	-5.1	0.7	3.8	3.9
Latin American and Caribbean	6.7	2.3	1.9	1.8	5.7	5.5	7.0
Argentina	0.5	4.9	-1.2	10.4	25.8	10.6	22.0
Brazil	2.2	2.3	1.4	5.8	4.5	6.2	6.5
Chile	0.3	4.2	3.0	1.0	10.0	1.9	3.5
Europe	28.7	0.1	1.6	-3.8	-2.0	1.5	1.0
Asia and Oceania	28.2	4.2	4.0	7.6	2.0	2.7	2.9
China	7.5	7.7	7.0	-3.6	-3.1	2.6	2.4
Japan	8.8	1.5	1.4	23.7	6.7	0.4	2.0
South Korea	2.0	3.0	3.4	-2.6	-1.8	1.3	1.8
Indonesia	0.8	5.8	5.2	6.0	5.5	6.4	6.2
Malaysia	0.4	4.7	4.8	1.0	-0.7	2.1	3.2
Philippines	0.3	7.2	6.3	-0.9	2.3	2.9	4.0
Thailand	0.4	2.9	2.4	-2.0	5.7	2.2	2.4
Vietnam	0.2	5.1	5.4	-4.0	-3.5	6.6	6.4
India	2.6	4.6	4.7	0.1	-1.7	10.9	6.9
Australia	1.7	2.4	2.9	6.3	9.4	2.4	2.9
New Zealand	0.2	2.5	3.3	-0.3	0.0	1.1	1.7
Middle East	3.8	3.2	3.1	1.0	0.6	6.9	7.3
Turkey	1.2	4.0	2.0	0.1	7.7	7.5	8.4
Africa	2.5	5.3	4.5	-1.6	-0.9	8.7	7.8

1/ Real values have a 2005 base year.

2/ Local currency per U.S. dollar. A negative growth rate indicates a depreciation of the dollar.

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

Export Products

Fiscal 2014 U.S. grain and feed exports are forecast at \$35.8 billion, up \$4.5 billion from the February forecast. Exports for all grain categories except rice are higher. Wheat is up \$700 million to \$8.5 billion due to higher prices as a result of lower U.S. new crop production and tight carry-in stocks. The United States is likely to be uncompetitive in wheat for the last few months of the fiscal year.

The forecast for coarse grains is raised \$2.3 billion to \$11.9 billion largely due to greater corn volume. Since last quarter, corn prices have strengthened due to strong foreign demand and diminished competition, especially from Argentina. Feeds and fodders are up \$1.5 billion to \$8.7 billion almost entirely due to higher volumes and unit values of distiller's dried grains with solubles (DDGS), arising from record Chinese demand. Rice exports are down \$100 million to \$2.1 billion mainly on weaker sales to Central America and Sub-Saharan Africa.

The fiscal 2014 export forecast for oilseeds and products is raised \$2.4 billion to a record \$33.8 billion on expanding global demand. Larger volume and higher unit values for both soybean and soybean meal drive the increase, with soybeans raised \$1.8 billion to \$23.5 billion and soybean meal raised \$300 million to \$5.4 billion. Soybean oil unit value is also raised, primarily due to tight supplies.

The fiscal 2014 export forecast for cotton is unchanged at \$4.4 billion. Changes to China's support policy, designed to limit accumulation of reserve stocks, are likely to constrain U.S. export opportunities to China. Global cotton prices are projected to remain relatively high.

The fiscal 2014 export forecast for livestock, dairy, and poultry is raised \$600 million to a record \$32.2 billion. Increases in dairy and beef more than offset declines in pork and poultry. Dairy products are raised \$500 million to \$6.8 billion as exports are higher than anticipated due to continuing strong global demand. Beef is raised \$300 million to \$5.6 billion on higher prices and slightly larger volumes. Poultry is reduced \$100 million to \$6.2 billion on weaker shipments of eggs.

The fiscal 2014 export forecast for horticultural products is lowered \$400 million to \$34.1 billion. Fresh fruit and vegetables are down \$200 million to \$7.7 billion on smaller volumes to Mexico and South Korea. Whole and processed tree nuts are reduced \$200 million to \$8.2 billion as demand weakens in China. Processed fruit and vegetable exports are unchanged at \$7.7 billion based on expected sustained growth in top markets.

Sugar and tropical product exports are forecast down \$200 million to \$6.7 billion due primarily to lower-than-anticipated volumes of fructose syrup to Mexico.

Table 3—U.S. agricultural exports: Value and volume, by commodity, 2013-14

Commodity	October - March		Fiscal year 2013	Forecast fiscal year 2014	
	2013	2014		Feb.	May
VALUE					
<i>-- Billion dollars --</i>					
Grains and feeds 1/	14.704	17.024	31.300	31.3	35.8
Wheat 2/	4.079	3.829	10.086	7.8	8.5
Rice	1.228	1.082	2.235	2.2	2.1
Coarse grains 3/	3.296	5.368	6.194	9.6	11.9
Corn	2.949	4.865	5.574	8.6	10.7
Feeds and fodders	3.883	4.467	8.246	7.2	8.7
Oilseeds and products	25.257	27.377	32.058	31.4	33.8
Soybeans	18.239	20.958	20.887	21.7	23.5
Soybean meal 4/	3.778	3.774	5.475	5.1	5.4
Soybean oil	0.856	0.543	1.148	0.6	0.7
Livestock, poultry, and dairy	15.032	16.558	31.491	31.6	32.2
Livestock products	9.315	9.759	18.868	19.0	19.2
Beef and veal 5/	2.381	2.783	5.207	5.3	5.6
Pork 5/	2.671	2.780	5.170	5.4	5.4
Beef and pork variety meats 5/	0.760	0.782	1.495	1.4	1.5
Hides, skins, and furs	1.373	1.514	3.056	3.1	3.1
Poultry and products	3.160	3.115	6.496	6.3	6.2
Broiler meat 5/ 6/	2.109	2.021	4.303	4.1	4.1
Dairy products	2.557	3.683	6.126	6.3	6.8
Tobacco, unmanufactured	0.826	0.790	1.196	1.1	1.1
Cotton	3.028	2.803	5.600	4.4	4.4
Seeds	1.061	1.102	1.598	1.4	1.4
Horticultural products 7/	16.080	17.195	31.352	34.5	34.1
Fruits and vegetables, fresh	3.532	3.569	7.330	7.9	7.7
Fruits and vegetables, processed 7/	3.503	3.763	7.146	7.7	7.7
Tree nuts, whole and processed	4.321	4.859	7.162	8.4	8.2
Sugar and tropical products 8/	3.073	3.124	6.295	6.9	6.7
Major bulk products 9/	30.696	34.831	46.199	46.8	51.5
Total	79.087	85.981	140.936	142.6	149.5
VOLUME					
<i>--- Million metric tons ---</i>					
Wheat 2/	11.685	12.493	30.992	28.4	27.3
Rice	2.164	1.844	3.867	3.7	3.6
Coarse grains 3/	10.286	24.180	20.458	45.2	53.0
Corn	9.106	22.057	18.189	41.0	48.0
Feeds and fodders	8.588	11.295	18.740	21.0	23.0
Soybeans	30.350	39.150	35.020	41.1	43.5
Soybean meal 4/	6.881	7.103	10.083	9.9	10.1
Soybean oil	0.736	0.572	0.982	0.7	0.7
Beef and veal 5/	0.388	0.422	0.835	0.8	0.8
Pork 5/	0.879	0.904	1.694	1.7	1.7
Beef and pork variety meats 5/	0.385	0.397	0.752	0.7	0.7
Broiler meat 5/ 6/	1.653	1.680	3.346	3.4	3.4
Tobacco, unmanufactured	0.108	0.104	0.165	0.1	0.1
Cotton	1.610	1.331	2.860	2.3	2.3
Major bulk products 9/	56.203	79.101	93.362	120.9	129.8

Totals may not add due to rounding.

1/ Includes corn gluten feed and meal and processed grain products. 2/ Excludes wheat flour. 3/ Includes corn, barley, sorghum, oats, and rye. 4/ Includes soy flours made from protein meals. 5/ Includes chilled, frozen, and processed meats.

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

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

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

Regional Exports

Agricultural exports in fiscal 2014 are at a record \$149.5 billion, \$6.9 billion higher than the February forecast and \$8.6 billion above final fiscal 2013. China, the EU, Southeast Asia, and South America account for most of the increase from last quarter.

Asia

Exports to **China** are forecast up \$3.0 billion from last quarter to a record \$28.0 billion. The soybean export value continues to climb on strong Chinese demand coupled with higher U.S. prices. Greater volumes and unit values of DDGS shipments, combined with strong demand for sorghum, also helped boost the export forecast. Year-to-date (October through March) exports to China set a new record and are 22 percent ahead of the same period a year ago. As the top U.S. market, China is now forecast to account for 19 percent of total U.S. agricultural exports.

Hong Kong is forecast up \$300 million from the February forecast to \$3.9 billion, primarily due to greater beef, poultry, and fresh fruit shipments. **South Korea** is raised \$200 million to \$5.4 billion, mainly as a result of higher corn commitments. **Indonesia** is increased \$300 million to \$3.0 billion on the strength of soybeans and dairy exports. The **Philippines** and **Thailand** are each raised \$200 million, to \$2.8 billion and \$1.6 billion respectively, based on strong soybean meal and dairy sales. **Malaysia** is up \$200 million to \$1.1 billion, largely due to higher dairy exports.

Western Hemisphere

Brazil is forecast up \$500 million to \$1.6 billion, mostly due to continued strong demand for U.S. wheat and diminished foreign supplies. **Colombia** and **Peru** are each raised \$200 million as a result of strong corn sales. The **Dominican Republic** is up \$100 million to \$1.2 billion due to expanding exports of consumer-oriented products (dairy, prepared food, and breakfast cereals). **Central America** is raised \$100 million on the basis of higher corn shipments to Guatemala.

Europe, Africa, and the Middle East

Exports to the **EU** are forecast up \$1.5 billion to \$12.0 billion due to robust demand for tree nuts, processed fruits and vegetables, and prepared food.

Egypt is lowered \$200 million to \$1.6 billion; shipments for the first six months of the year have lagged behind the same period last year by 33 percent.

Saudi Arabia is raised \$200 million to \$1.3 billion due to higher corn and soybean shipments.

Table 4—U.S. agricultural exports: Value by region, 2013-14

Country and region 1/	October - March		Fiscal year	Share of	Forecast fiscal year	
	2013	2014	2013	2013 total	2014	
	-- Billion dollars --			Percent	-- Billion dollars --	
					Feb.	May
Asia	36.732	41.887	60.004	42.6	63.1	67.5
East Asia	30.272	34.560	47.943	34.0	50.2	53.7
Japan	6.424	6.362	12.406	8.8	13.1	13.1
China	17.059	20.741	23.477	16.7	25.0	28.0
Hong Kong	1.943	2.224	3.629	2.6	3.6	3.9
Taiwan	1.855	1.906	3.185	2.3	3.3	3.3
South Korea	2.977	3.321	5.223	3.7	5.2	5.4
Southeast Asia	5.474	6.513	10.319	7.3	10.9	11.8
Indonesia	1.225	1.631	2.614	1.9	2.7	3.0
Philippines	1.275	1.504	2.399	1.7	2.6	2.8
Malaysia	0.538	0.558	1.022	0.7	0.9	1.1
Thailand	0.832	1.058	1.445	1.0	1.4	1.6
Vietnam	1.241	1.327	2.065	1.5	2.1	2.1
South Asia	0.986	0.814	1.741	1.2	2.0	2.0
India	0.594	0.445	0.970	0.7	1.0	1.0
Western Hemisphere	26.241	27.767	53.327	37.8	53.5	54.6
North America	19.445	19.991	39.335	27.9	40.2	40.2
Canada	10.519	10.448	21.419	15.2	21.6	21.6
Mexico	8.926	9.544	17.916	12.7	18.6	18.6
Caribbean	1.956	1.869	3.649	2.6	3.7	3.8
Dominican Republic	0.609	0.654	1.132	0.8	1.1	1.2
Central America	1.721	1.890	3.307	2.3	3.2	3.3
South America	3.118	4.016	7.035	5.0	6.4	7.3
Brazil	0.308	0.814	1.557	1.1	1.1	1.6
Colombia	0.808	1.098	1.412	1.0	1.6	1.8
Peru	0.296	0.509	0.666	0.5	0.7	0.9
Venezuela	0.823	0.655	1.602	1.1	1.5	1.5
Europe/Eurasia	8.393	8.882	13.992	9.9	12.8	14.3
European Union-28	6.950	7.563	11.536	8.2	10.5	12.0
Other Europe 2/	0.362	0.323	0.652	0.5	0.7	0.7
FSU-12 3/	1.081	0.996	1.804	1.3	1.6	1.6
Russia	0.820	0.730	1.316	0.9	1.3	1.3
Middle East	3.629	3.862	6.311	4.5	6.0	6.2
Turkey	1.453	1.403	2.182	1.5	1.9	1.9
Saudi Arabia	0.620	0.766	1.132	0.8	1.1	1.3
Africa	3.110	2.541	5.441	3.9	5.6	5.4
North Africa	1.836	1.413	2.776	2.0	2.9	2.7
Egypt	1.243	0.833	1.668	1.2	1.8	1.6
Sub-Saharan Africa	1.274	1.129	2.665	1.9	2.7	2.7
Nigeria	0.504	0.419	1.104	0.8	1.1	1.1
Oceania	0.164	0.192	1.861	1.3	1.8	1.8
Trans-shipments via Canada 4/	0.000	0.000	0.000	0.0	0.0	0.0
Total	79.087	85.981	140.936	100.0	142.6	149.5

Totals may not add due to rounding.

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

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

3/ The former 15 Republics of the Soviet Union, not including the 3 Baltic Republics.

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

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

Import Products

While the U.S. unemployment rate of 6.3 percent is close to full employment, and disposable personal income rose 3.5 percent from January to March 2014, agricultural imports are expected to increase at a moderate pace of 6.4 percent to \$110.5 billion this fiscal year, \$500 million more than the February projection. These imports increased by only 1.7 percent in value in the first half of the fiscal year compared to 2013, while import volume was unchanged. The largest forecast decline is \$1 billion for sugar and tropical products as import unit values for coffee and rubber were lower. The aggregate import forecast for 2014 is driven more by food and beverage price gains than by volume, which contrast with the 11-percent volume gain and 10-percent import unit value decline in 2013.

As represented by import volume, U.S. demand for agricultural products in the first two quarters of fiscal year 2014 was flat. Part of this consumption behavior is due to the unusually cold winter that weakened consumer spending for food, especially with respect to food services, which dropped 2.4 percent in the second quarter from January to March after rising 7.7 percent in the preceding quarter. As a result, some pent-up demand for food products is projected to boost imports during the second half of the fiscal year. The 2.3-percent average growth of personal disposable income (in current dollars) over the past four quarters will help support this pent-up demand.

U.S. import demand for horticultural crops and products remains strong, up \$4.4 billion from 2013 to \$48.5 billion. Both aggregate import volume and average import unit value are higher compared to 2013. Total import value in the first half of the year is up 5.0 percent. Strong import volume shipments are driven by fresh citrus fruits, other fresh fruits (not deciduous), melons, fresh vegetables and potatoes, and processed or frozen vegetables. Volume shipments of beer are up, but down for wine. Nevertheless, import unit values for wine and beer are higher. Another strong import driver is prepared foods and beverages containing horticultural products, whose \$5.1-billion combined value in 2013 comprised nearly 12 percent of the horticulture total.

The \$1-billion lower value projection for imported sugar and tropical products is largely due to downward adjustments for coffee and rubber products, whose unit values have fallen. In contrast, import demand for cocoa products, such as cocoa beans and chocolate, is stronger (i.e., both volume and unit value are up). Nevertheless, higher unit values for cocoa or spices and tea are not enough to offset the lower import unit values of coffee beans and natural rubber. Imports of sugar and related products are expected to be roughly equal to that of 2013, even as volume shipments of imported confections are larger to date. Except for sugar, tropical products are not produced domestically, thus their import values are largely dependent on foreign supply quantities and prices.

Tropical oil prices are up 13.0 percent and 48.0 percent for palm and coconut oils, respectively, from average prices in 2013. Given that olive oil prices are flat, the total value of imported vegetable oils is projected to climb to \$5.6 billion in 2014 from \$5.2 billion in 2013. Larger volume imports of oilseeds, such as rape or colza seeds and soybeans, are expected to raise their import value by \$600 million this year. Soybean shipments from South America are expected to be up sharply in the coming months. Thus, the import value for total oilseeds and products is projected

up by \$1.1 billion to \$9.9 billion in 2014, \$500 million more than the previous estimate.

While bulk grain imports are expected to decline by \$800 million in value (a 23-percent decline from 2013) due to much smaller feed grain shipments, particularly corn, imported grain products are projected to rise by about \$400 million from 2013. Processed grain products, including pasta, cereal, and bakery goods, amount to \$6.6 billion in 2014, \$300 million lower than the last estimate. Rice imports are up due to a smaller domestic production level in 2013/14, and wheat imports are up because of a record Canadian wheat harvest. As a result, the total value of imported grains, feed, and grain products is estimated at \$10.7 billion in 2014, roughly \$580 million less than the \$11.3-billion cost in 2013.

U.S. cattle and calf imports are reduced \$100 million from February as lower forecast volumes more than offset higher prices. Despite strong demand from U.S. producers, cattle supplies in Canada and Mexico are limited, reflecting years of liquidation and, in the case of Canada, expectations of retention females for herd rebuilding. Conversely, the value of beef imports is raised as tight supplies of processing-grade beef results in strong demand for imported beef. Although only small changes are forecast in the volume of beef imports, values are raised almost \$100 million as processors are expected to bid higher in competition with other countries for supplies of beef. Pork and swine imports are also raised nearly \$100 million from February, largely reflecting higher domestic prices as Porcine Epidemic Diarrhea (PED) limits supplies of hogs and results in lower U.S. pork production.

U.S. livestock and meat imports are projected at \$11.1 billion, \$1 billion more than last year and \$100 million more than the February forecast. Together with \$3.2 billion of imported dairy products, largely cheese and casein, and \$700 million of poultry products, total imports of animal products amount to \$15.1 billion in 2014, \$100 million larger than the previous forecast and \$1.36 billion more than in 2013.

Table 5—U.S. agricultural imports: Value and volume, by commodity, 2013-14

Commodity	October - March		Fiscal year 2013	Forecast fiscal year 2014	
	2013	2014		Feb.	May
VALUE					
--- Billion dollars ---					
Livestock and dairy products	7.060	7.348	13.742	15.0	15.1
Livestock and meats	5.122	5.398	10.091	11.0	11.1
Cattle and calves	1.057	1.107	1.808	2.0	1.9
Swine	0.163	0.175	0.329	0.3	0.4
Beef and veal	1.763	1.895	3.679	4.0	4.1
Pork	0.680	0.755	1.416	1.5	1.6
Dairy products	1.617	1.604	2.998	3.2	3.2
Cheese	0.608	0.620	1.148	1.3	1.3
Grains and feed	5.609	5.327	11.281	9.5	10.7
Grain products	3.017	3.178	6.175	6.9	6.6
Oilseeds and products	4.260	4.464	8.833	9.4	9.9
Vegetable oils	2.557	2.602	5.231	5.8	5.6
Horticulture products	22.323	23.448	44.115	48.7	48.5
Fruits, fresh	4.316	4.900	8.343	9.4	10.0
Fruits, processed	2.412	2.316	4.714	5.1	5.0
Fruit juices	1.054	0.948	1.894	1.8	1.8
Nuts, whole and processed	0.836	0.959	1.811	2.1	2.1
Vegetables, fresh	3.568	3.806	6.540	7.2	7.1
Vegetables, processed	2.130	2.155	4.220	4.3	4.4
Wine	2.678	2.680	5.356	5.8	5.5
Malt beer	1.695	1.781	3.581	4.1	4.0
Essential oils	1.375	1.381	2.789	3.2	3.1
Cut flowers and nursery stock	0.879	0.877	1.666	1.8	1.7
Sugar and tropical products	11.311	10.852	23.460	24.5	23.5
Sweeteners & products	2.233	2.149	4.611	4.6	4.5
Confections	0.727	0.791	1.541	1.7	1.7
Cocoa and chocolate	2.081	2.436	4.020	5.0	4.9
Coffee beans and products	2.921	2.448	6.057	6.0	5.6
Rubber, natural	1.375	1.175	2.673	2.8	2.5
Other imports 1/	1.183	1.207	2.414	2.8	2.7
Total agricultural imports	51.747	52.646	103.845	110.0	110.5
VOLUME					
--- Million metric tons 2/---					
Wine 3/	0.622	0.581	1.183	1.2	1.2
Malt beer 3/	1.461	1.512	3.133	3.5	3.3
Fruit juices 3/	2.477	2.304	4.518	4.4	4.3
Cattle and calves 4/	1.238	1.261	2.032	2.0	2.0
Swine 4/	2.706	2.272	5.263	4.8	4.6
Beef and veal	0.351	0.373	0.733	0.8	0.8
Pork	0.180	0.195	0.371	0.4	0.4
Fruits, fresh	5.103	5.263	10.420	11.0	11.0
Fruits, processed	0.807	0.804	1.685	1.8	1.8
Vegetables, fresh	3.387	3.667	6.030	6.4	6.5
Vegetables, processed	1.616	1.639	3.200	3.2	3.3
Vegetable oils	1.887	2.068	3.961	4.6	4.5
Cocoa and chocolate	0.636	0.715	1.258	1.4	1.4
Coffee beans	0.710	0.726	1.525	1.6	1.6

Totals may not add due to rounding.

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

4/ Million head.

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

Regional Imports

Of the top import suppliers to the United States, Canada has the most balanced basket of products—grains and feed, horticultural products, livestock products, and oilseed products. Grain products, wheat, and rapeseed meal and oil imports have the largest volumes from Canada. Imports from Mexico are predominantly horticultural products—vegetables, followed by fruits. Sugar is the next largest import commodity from Mexico. From China, processed vegetables, preserved fruit, and fruit juices (apple) are the top imports. India primarily exports guar/mucilage, cashew nuts, and spices to the United States. Coffee beans and frozen orange juice are Brazil's leading exports.

Rubber, coffee, palm oil, and spices are Indonesia's principal exports to the United States. Fresh fruits, wine, and field crop seeds for planting are Chile's top exports. From Australia, beef, lamb, mutton, and wine top the list of imports. Rice, processed fruit, and rubber are the largest imports from Thailand. Italy is the primary source of U.S. cheese and wine imports, followed by France. Tree nuts are largely imported from Vietnam, India, and Mexico.

Over 40 percent of U.S. agricultural imports come from NAFTA partners Canada and Mexico. A large part of the other 60 percent of imports is supplied almost evenly by Asia, Europe, and Latin America. From Europe, the top source of imports is Italy.

Table 6--U.S. agricultural imports: Value by region, 2013-14

Region and country	October - March		Fiscal year 2013	Forecast fiscal year	
	2013	2014		2014	
				Feb.	May
VALUE	<i>— Billion dollars—</i>				
Western Hemisphere	28.868	29.501	57.284	60.7	61.6
Canada	10.624	10.971	21.557	22.8	22.8
Mexico	8.771	9.683	17.215	18.8	20.0
Central America	2.240	2.042	4.693	4.7	4.7
Costa Rica	0.711	0.702	1.469	1.6	1.6
Guatemala	0.901	0.808	1.866	1.8	1.8
Other Central America	0.628	0.531	1.358	1.4	1.3
Caribbean	0.224	0.213	0.473	0.5	0.5
South America	7.009	6.591	13.345	14.0	13.5
Argentina	0.886	0.778	1.820	1.9	1.7
Brazil	2.032	1.530	3.751	3.9	3.3
Chile	1.540	1.502	2.843	3.0	2.9
Colombia	1.083	1.126	2.141	2.3	2.3
Other South America	1.468	1.655	2.789	3.0	3.2
Europe and Eurasia	9.371	9.679	18.656	19.7	19.5
European Union-28	8.621	8.992	17.332	18.4	18.2
Other Europe	0.698	0.640	1.210	1.2	1.2
Asia	9.186	8.942	19.399	20.5	20.1
East Asia	2.933	2.891	5.864	6.0	6.0
China	2.245	2.203	4.458	4.5	4.5
Other East Asia	0.688	0.688	1.406	1.5	1.5
Southeast Asia	4.677	4.585	9.597	10.2	10.0
Indonesia	1.556	1.545	3.127	3.3	3.2
Malaysia	0.877	0.754	1.684	1.8	1.7
Thailand	1.078	1.098	2.216	2.4	2.4
Other Southeast Asia	1.166	1.189	2.570	2.7	2.7
South Asia	1.576	1.466	3.938	4.4	4.1
India	1.464	1.349	3.695	4.0	3.7
Oceania	2.513	2.494	4.989	5.2	5.2
Australia	1.353	1.396	2.719	2.9	2.9
New Zealand	1.103	1.048	2.177	2.3	2.2
Africa	1.236	1.432	2.405	2.5	2.8
Sub-Saharan Africa	1.059	1.240	2.063	2.1	2.4
Ivory Coast	0.510	0.730	0.890	1.1	1.3
Middle East	0.572	0.599	1.113	1.3	1.2
Turkey	0.367	0.381	0.714	0.9	0.8
World total	51.747	52.646	103.845	110.0	110.5

Totals may not add due to rounding.

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

Reliability Tables

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

Commodity	Average absolute forecast errors Fiscal 2008-13					Forecast accuracy Fiscal 2008-13					Forecast accuracy
	Aug	Nov	Feb	May	Aug	Aug	Nov	Feb	May	Aug	
Export value	<i>Percent</i>					<i>"X" if error < 5%</i>					<i>Percent</i>
Grains and feeds	21	12	6	4	2	-	-	-	X	X	40
Wheat	27	17	12	8	5	-	-	-	-	X	20
Rice	12	11	12	8	3	-	-	-	-	X	20
Coarse grains	39	25	12	6	2	-	-	-	-	X	20
Corn	39	26	13	6	2	-	-	-	-	X	20
Feeds and fodders	11	9	9	4	2	-	-	-	X	X	40
Oilseeds and products	18	12	9	5	1	-	-	-	X	X	40
Soybeans	17	13	10	6	2	-	-	-	-	X	20
Soybean meal	27	21	15	8	2	-	-	-	-	X	20
Soybean oil	37	22	18	8	2	-	-	-	-	X	20
Livestock, poultry, and dairy	15	11	7	3	1	-	-	-	X	X	40
Livestock products	12	8	4	2	2	-	-	X	X	X	60
Beef and veal	14	9	7	7	4	-	-	-	-	X	20
Pork	14	10	7	4	4	-	-	-	X	X	40
Beef and pork variety meats	19	17	16	12	17	-	-	-	-	-	0
Hides, skins, and furs	17	15	12	9	5	-	-	-	-	X	20
Poultry and products	10	11	10	5	3	-	-	-	X	X	40
Broiler meat	13	13	11	7	4	-	-	-	-	X	20
Dairy products	35	27	20	9	4	-	-	-	-	X	20
Tobacco, unmanufactured	10	8	3	9	3	-	-	X	-	X	40
Cotton	28	17	9	4	2	-	-	-	X	X	40
Planting seeds	10	8	10	8	5	-	-	-	-	X	20
Horticultural products	5	5	4	2	1	X	X	X	X	X	100
Fruits and vegetables, fresh	6	6	4	3	2	-	-	X	X	X	60
Fruits and veget., processed	7	6	4	4	2	-	-	X	X	X	60
Tree nuts	9	9	5	3	2	-	-	X	X	X	60
Sugar and tropical products	10	7	6	3	2	-	-	-	X	X	40
Major bulk products	21	10	6	3	1	-	-	-	X	X	40
Total agricultural exports	13	8	4	2	1	-	-	X	X	X	60
Average error & accuracy	18	13	9	6	3	3%	3%	24%	52%	97%	36
Export volume											
Wheat	10	7	9	8	4	-	-	-	-	X	20
Rice	12	11	8	4	3	-	-	-	X	X	40
Coarse grains	22	15	10	6	2	-	-	-	-	X	20
Corn	23	16	11	7	2	-	-	-	-	X	20
Feeds and fodders	12	11	8	5	4	-	-	-	X	X	40
Soybeans	11	11	8	5	2	-	-	-	X	X	40
Soybean meal	14	11	8	4	3	-	-	-	X	X	40
Soybean oil	26	19	17	6	4	-	-	-	-	X	20
Beef and veal	13	9	7	5	0	-	-	-	X	X	40
Pork	13	9	7	2	4	-	-	-	X	X	40
Beef and pork variety meats	12	11	9	4	12	-	-	-	X	-	20
Broiler meat	10	9	6	6	3	-	-	-	-	X	20
Tobacco, unmanufactured	0	0	0	0	0	X	X	X	X	X	100
Cotton	14	12	10	5	2	-	-	-	X	X	40
Major bulk products	7	6	4	3	1	-	-	X	X	X	60
Average error & accuracy	13	10	8	5	3	7%	7%	13%	67%	93%	37

- = Error exceeds 5 percent.

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

Country/region	Average absolute forecast errors Fiscal 2008-13					Forecast accuracy Fiscal 2008-13					Forecast
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	accuracy
Export value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Asia	20	10	9	5	1	-	-	-	X	X	40
East Asia	15	11	10	5	2	-	-	-	X	X	40
Japan	13	8	7	5	2	-	-	-	X	X	40
China	20	19	16	8	6	-	-	-	-	-	0
Hong Kong	18	13	9	6	3	-	-	-	-	X	20
Taiwan	17	8	6	5	5	-	-	-	X	X	40
South Korea	26	21	16	10	2	-	-	-	-	X	20
Southeast Asia	17	14	11	9	4	-	-	-	-	X	20
Indonesia	25	17	12	8	3	-	-	-	-	X	20
Philippines	20	16	9	5	3	-	-	-	X	X	40
Malaysia	16	9	14	12	6	-	-	-	-	-	0
Thailand	23	19	11	7	4	-	-	-	-	X	20
Vietnam	41	41	12	0	2	-	-	-	X	X	40
South Asia	21	20	19	15	14	-	-	-	-	-	0
India	40	40	11	5	5	-	-	-	X	X	40
Western Hemisphere	10	5	3	2	1	-	X	X	X	X	80
North America	10	5	3	2	1	-	X	X	X	X	80
Canada	8	5	3	1	1	-	X	X	X	X	80
Mexico	13	7	5	3	2	-	-	X	X	X	60
Caribbean	9	8	6	7	4	-	-	-	-	X	20
Dominican Republic	46	46	12	7	7	-	-	-	-	-	0
Central America	14	12	10	4	3	-	-	-	X	X	40
South America	23	16	11	8	5	-	-	-	-	X	20
Brazil	39	33	28	32	9	-	-	-	-	-	0
Colombia	35	31	17	11	6	-	-	-	-	-	0
Peru	50	50	30	10	10	-	-	-	-	-	0
Venezuela	22	17	14	10	4	-	-	-	-	X	20
Europe and Eurasia	17	11	7	7	3	-	-	-	-	X	20
European Union-27	21	14	11	8	3	-	-	-	-	X	20
Other Europe	21	25	22	25	7	-	-	-	-	-	0
FSU-12	18	14	13	11	8	-	-	-	-	-	0
Russia	23	23	19	17	8	-	-	-	-	-	0
Middle East	24	15	10	7	4	-	-	-	-	X	20
Turkey	27	14	11	10	7	-	-	-	-	-	0
Saudi Arabia	19	18	12	9	3	-	-	-	-	X	20
Africa	33	23	9	10	6	-	-	-	-	-	0
North Africa	52	37	14	16	11	-	-	-	-	-	0
Egypt	40	27	14	13	6	-	-	-	-	-	0
Sub-Saharan Africa	17	16	9	6	7	-	-	-	-	-	0
Nigeria	45	39	0	0	0	-	-	X	X	X	60
Oceania	25	13	11	9	3	-	-	-	-	X	20
Average error and accuracy	24	19	12	9	5	0%	7%	12%	32%	63%	23

- = Error exceeds 5 percent.

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

Commodity	Average absolute forecast errors Fiscal 2008-13					Forecast accuracy Fiscal 2008-13					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
Import value			<i>Percent</i>					<i>"X" if error ≤ 5%</i>			<i>Percent</i>
Livestock, poultry, and dairy	7	5	3	4	2	-	X	X	X	X	80
Livestock and meats	6	4	3	3	2	-	X	X	X	X	80
Cattle and calves	19	11	8	5	2	-	-	-	X	X	40
Swine	30	26	23	14	11	-	-	-	-	-	0
Beef and veal	11	9	7	6	4	-	-	-	-	X	20
Pork	9	8	5	7	3	-	-	X	-	X	40
Dairy products	13	10	5	5	3	-	-	X	X	X	60
Cheese	13	6	5	5	5	-	-	X	X	X	60
Grains and feed	9	6	7	4	2	-	-	-	X	X	40
Grain products	5	3	4	3	1	X	X	X	X	X	100
Oilseeds and products	23	16	18	10	4	-	-	-	-	X	20
Vegetable oils	25	17	17	10	4	-	-	-	-	X	20
Horticulture products	4	4	4	3	1	X	X	X	X	X	100
Fruits, fresh	5	5	2	3	0	X	X	X	X	X	100
Fruits, preserved	16	14	12	8	2	-	-	-	-	X	20
Fruit juices	26	21	16	11	4	-	-	-	-	X	20
Nuts and preparations	18	13	9	6	4	-	-	-	-	X	20
Vegetables, fresh	6	6	7	2	1	-	-	-	X	X	40
Vegetables, processed	5	4	4	3	1	X	X	X	X	X	100
Wine	6	5	5	4	1	-	X	X	X	X	80
Malt beer	8	5	3	3	3	-	X	X	X	X	80
Essential oils	9	6	5	3	2	-	-	X	X	X	60
Cut flowers and nursery stock	5	3	2	2	1	X	X	X	X	X	100
Sugar and tropical products	16	16	13	8	4	-	-	-	-	X	20
Sweeteners and products	45	42	37	27	25	-	-	-	-	-	0
Confections	106	97	94	94	93	-	-	-	-	-	0
Cocoa and products	9	10	10	8	5	-	-	-	-	X	20
Coffee beans and products	21	18	14	5	3	-	-	-	X	X	40
Natural rubber	39	40	36	29	13	-	-	-	-	-	0
Other imports	7	6	10	5	2	-	-	-	X	X	40
Total agricultural imports	8	7	6	5	2	-	-	-	X	X	40
Average error and accuracy	17	14	13	10	7	16%	29%	42%	58%	87%	46
Import volume											
Wine (HL)	13	12	7	3	2	-	-	-	X	X	40
Malt beer (HL)	10	5	3	4	3	-	X	X	X	X	80
Fruit juices (HL)	11	13	8	7	3	-	-	-	-	X	20
Cattle and calves	11	4	4	8	2	-	X	X	-	X	60
Swine	6	3	4	3	0	-	X	X	X	X	80
Beef and veal	22	17	11	9	5	-	-	-	-	X	20
Pork	0	0	13	13	8	X	X	-	-	-	40
Fruits--fresh	4	3	3	4	2	X	X	X	X	X	100
Fruits--processed	9	6	3	3	2	-	-	X	X	X	60
Vegetables--fresh	3	4	4	4	1	X	X	X	X	X	100
Vegetables--processed	6	4	3	2	1	-	X	X	X	X	80
Vegetable oils	7	5	4	5	2	-	X	X	X	X	80
Cocoa and products	11	9	6	7	4	-	-	-	-	X	20
Coffee beans and products	10	6	6	4	2	-	-	-	X	X	40
Average error and accuracy	9	7	6	5	3	21%	57%	57%	64%	93%	59

- = 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 2008-13					Forecast accuracy Fiscal 2008-13					Forecast accuracy
	Aug.	Nov.	Feb.	May	Aug.	Aug.	Nov.	Feb.	May	Aug.	
Import value	<i>Percent</i>					<i>"X" if error ≤ 5%</i>					<i>Percent</i>
Western Hemisphere	7	5	5	4	2	-	X	X	X	X	80
Canada	11	8	6	6	2	-	-	-	-	X	20
Mexico	7	6	4	3	2	-	-	X	X	X	60
Central America	9	6	11	8	1	-	-	-	-	X	20
Costa Rica	12	5	5	7	3	-	X	X	-	X	60
Guatemala	10	7	14	9	4	-	-	-	-	X	20
Other Central America	18	14	19	11	4	-	-	-	-	X	20
Caribbean	24	14	14	9	0	-	-	-	-	X	20
South America	8	5	6	4	2	-	X	-	X	X	60
Argentina	20	9	13	11	9	-	-	-	-	-	0
Brazil	11	6	5	9	6	-	-	X	-	-	20
Chile	5	8	5	3	1	X	-	X	X	X	60
Colombia	9	7	8	4	1	-	-	-	X	X	40
Other South America	17	6	7	3	2	-	-	-	X	X	40
Europe and Eurasia	6	6	3	2	1	-	-	X	X	X	60
European Union-27	7	6	3	2	0	-	-	X	X	X	60
Other Europe	14	9	18	17	6	-	-	-	-	-	0
Asia	16	12	14	9	4	-	-	-	-	X	20
East Asia	7	10	8	5	3	-	-	-	X	X	40
China	8	10	9	5	2	-	-	-	X	X	40
Other East Asia	3	8	6	6	3	X	-	-	-	X	20
Southeast Asia	21	17	19	13	5	-	-	-	-	X	20
Indonesia	25	21	23	18	7	-	-	-	-	-	0
Malaysia	31	17	24	21	9	-	-	-	-	-	0
Thailand	17	14	16	12	4	-	-	-	-	X	20
Other Southeast Asia	17	13	11	5	1	-	-	-	X	X	40
South Asia	31	26	27	17	6	-	-	-	-	-	0
India	33	27	28	20	8	-	-	-	-	-	0
Oceania	9	5	9	9	4	-	X	-	-	X	40
Australia	10	6	9	7	5	-	-	-	-	X	20
New Zealand	11	6	8	11	4	-	-	-	-	X	20
Africa	15	13	12	10	6	-	-	-	-	-	0
Sub-Saharan Africa	15	12	11	8	4	-	-	-	-	X	20
Ivory Coast	16	17	19	16	9	-	-	-	-	-	0
Middle East	11	9	9	3	2	-	-	-	X	X	40
Turkey	16	12	16	9	3	-	-	-	-	X	20
Average error & accuracy	14	11	12	9	4	6%	11%	19%	33%	75%	28

- = Error exceeds 5 percent.

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Related Websites

Outlook for U.S. Agricultural Trade

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

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

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

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

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

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

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