



# Outlook for U.S. Agricultural Trade



## FY 2018 Exports Forecast Up \$1.0 Billion at \$140.0 Billion; Imports at \$117.0 Billion

Fiscal Year 2018 agricultural exports are projected at \$140.0 billion, up \$1.0 billion from the August forecast, largely due to expected increases in corn and distiller's dried grains with solubles (DDGS). Higher corn volumes and unit values and strong demand for DDGS are largely responsible for driving grain and feed exports up \$1.0 billion to \$29.4 billion. Soybean export volumes continue to set records, raising the soybean forecast \$200 million to \$24.1 billion, which offsets expected declines in soybean meal and oil. Cotton exports are up \$300 million on higher volumes and unit values. Livestock, poultry, and dairy exports are raised \$200 million to \$29.7 billion, largely due to higher forecasts for beef, poultry, and animal products such as lard and tallow. Horticultural products are unchanged at \$34.5 billion.

U.S. agricultural imports in fiscal year 2018 are forecast at \$117.0 billion, up \$1.5 billion from the August forecast, due largely to expected increases in imports of animal products. The U.S. agricultural trade surplus is expected to decline by \$500 million to \$23.0 billion in fiscal 2018.

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	
							Aug.	Nov.
<i>Billion dollars</i>								
Exports	135.9	141.1	152.3	139.8	129.6	140.5	139.0	140.0
Imports	103.4	103.9	109.3	114.2	113.0	119.1	115.5	117.0
Balance	32.5	37.3	43.1	25.5	16.6	21.3	23.5	23.0

\*Reflect forecasts in the November 8, 2017, *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.

### *Steady world economic growth expected in 2018*

World per capita GDP growth is expected to reach 1.9 percent in 2017 and 2.0 percent in 2018. This represents a broad-based pickup in economic activity across developed and developing countries, compared to growth of 1.4 percent in 2016. In the key emerging markets of Brazil, Russia, India, Indonesia, and China, per capita GDP growth is expected to accelerate to 4.4 percent on average in 2017 and 4.7 percent in 2018. Global trade volume growth is expected to be 5.6 percent in 2017, slowing to 4.2 percent in 2018. This represents a much-improved performance relative to the 1.6 percent growth in 2015 and 2016.

The value of the U.S. dollar has declined since the beginning of this year and is expected to generally trend weaker against many trading partners and competitors into 2018. During 2017, these currencies gained back some of the value that was lost during the period of dramatic dollar-strengthening that began in late 2014. Nevertheless, the dollar remains well above 2011-2014 levels, supported by a stronger than previously expected U.S. economy and the likelihood that U.S. monetary policy will be restrictive, compared to most of the rest of the world.

Oil prices are expected to rise slightly in 2018 as global crude oil demand continues to grow and extended OPEC production cuts remain uncertain, but these factors are mitigated by increased U.S. production. The U.S. Energy Information Administration forecasts a modest rise in Brent crude spot prices, averaging \$53.01 per barrel for 2017 and \$55.61 in 2018. Expectations are that 2017 and 2018 oil prices will remain low compared with recent price 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 2017 and 2018. U.S. per capita GDP growth is expected to be 1.5 percent in 2017 and 1.7 percent in 2018 as the employment picture continues to improve, with the unemployment rate falling to a 17-year low of 4.1 percent in October. Growing external demand for Canadian goods is projected to accelerate; combined with moderate business investment growth, this contributes to an expected Canadian per capita GDP growth of 1.5 percent in 2018, after the investment-led burst to 2.3 percent in 2017. Mexican income growth is expected to accelerate to 1.3 percent in 2018 from 1.1 percent in 2017 as export growth remains strong, although private consumption is expected to slow.

Per capita income growth in the Eurozone at 2.0 percent in 2017 is expected to be the strongest since the global financial crisis began in 2007, with sustained growth of 1.8 percent in 2018. Strong employment growth and rising workforce participation rates are expected to support higher output and to continue to spur consumer spending.

Per capita income growth in Asia and Oceania is expected to be little changed from 2017, at 3.7 percent in 2018. Income growth in China is expected to slow slightly to 5.9 percent in 2018, due to slower demand in Asia, a less expansionary monetary policy, and a slowdown of real estate activity. Japan is expected to have income

growth of 1.6 percent in both 2017 and 2018, helped by a relatively weak currency and strong expected global trade growth. However, sluggish wage growth, despite a tight labor market, is expected to limit domestic consumption. Income growth in India is expected to rise to 6.4 percent in 2018 as structural adjustments to demonetization are resolved and strong infrastructure and capital spending support growth.

Although Latin America is expected to emerge from recession, per capita economic growth will be only 0.3 percent in 2017 before rebounding to 1.5 percent in 2018. Income growth is expected to grow to 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. Brazil's economy is expected to rebound similarly, driven by a recovery in household consumption. Unlike its neighbors, Venezuela will remain in recession in 2018 as 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>-1.2</b>	<b>2.9</b>	<b>1.9</b>	<b>2.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>
<b>NAFTA</b>	<b>-1.7</b>	<b>-2.2</b>	<b>1.5</b>	<b>1.6</b>	<b>26.4</b>	<b>6.7</b>	<b>28.3</b>
United States	--	--	1.5	1.7	22.4	4.5	--
Canada	-1.5	-1.1	2.3	1.5	2.4	0.5	16.1
Mexico	-2.0	-3.8	1.1	1.3	1.6	1.7	12.2
<b>Emerging Markets</b>	<b>0.3</b>	<b>-0.7</b>	<b>4.4</b>	<b>4.7</b>	<b>21.6</b>	<b>44.9</b>	<b>20.0</b>
Brazil	-9.5	1.8	0.0	1.5	3.1	2.8	0.9
Russia	-14.2	-0.6	2.2	1.9	2.2	2.0	0.3
India	-3.2	-5.2	5.2	6.4	3.2	17.4	0.8
Indonesia	-1.0	1.9	4.1	4.3	1.3	3.6	1.7
China	2.3	-1.0	6.1	5.9	11.8	19.1	16.3
<b>Europe &amp; Central Asia</b>	<b>-1.0</b>	<b>-2.9</b>	<b>2.0</b>	<b>1.7</b>	<b>28.4</b>	<b>11.5</b>	<b>10.7</b>
Euro Zone	-0.9	-1.9	2.0	1.8	17.5	4.8	6.8
Ukraine	-4.4	-3.4	2.3	2.1	0.2	0.6	0.1
Turkey	11.9	-6.5	3.3	3.0	1.2	1.1	1.1
<b>Asia &amp; Oceania</b>	<b>2.0</b>	<b>0.1</b>	<b>3.6</b>	<b>3.7</b>	<b>31.5</b>	<b>54.9</b>	<b>45.9</b>
Japan	5.2	2.6	1.6	1.6	7.6	1.8	8.5
South Korea	-2.1	-3.1	2.4	2.6	1.7	0.7	4.5
Australia	-2.5	2.7	1.3	1.5	1.8	0.3	1.1
Other SE Asia 4/	1.8	0.9	4.2	3.9	1.5	4.1	5.2
<b>Latin America</b>	<b>-2.5</b>	<b>5.6</b>	<b>0.3</b>	<b>1.5</b>	<b>8.0</b>	<b>8.6</b>	<b>21.5</b>
Argentina	-8.8	-4.2	1.7	2.3	0.7	0.6	0.1
Other S. America 5/	-4.6	1.4	1.0	2.0	1.2	1.6	3.0
<b>Middle East &amp; N. Africa</b>	<b>12.8</b>	<b>-4.9</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>-3.5</b>	<b>3.5</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.

3/ Regional values for Real Exchange rates are growth in GDP-weighted average of country real exchange rate index. World real exchange rate is a U.S. agricultural exports-weighted index.

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

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

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

## Export Products

Fiscal year 2018 grain and feed exports are \$29.4 billion, up \$1.0 billion from the August forecast, due mainly to coarse grains and feeds and fodders. Corn exports are forecast at \$8.5 billion, up \$500 million on both higher volumes and unit values. These are supported by strong early-season sales and shipments, primarily to Mexico. With sharply lower domestic sorghum supplies, Mexico is expected to boost corn imports to satisfy feed demand. Feeds and fodders are forecast at \$7.5 billion, up \$500 million on expectations of strong demand for distiller's dried grains with solubles (DDGS). Wheat exports are forecast at \$6.3 billion, down \$100 million as lower unit values more than offset higher volume. Unit values are lower on pressure from abundant global supplies, especially in Russia. Volume is up on large sales to Iraq and the expectation that U.S. wheat will be more competitive later in the year. Rice exports are forecast at \$1.9 billion, up \$200 million as higher unit values more than offset lower volumes. Unit values are higher based on a smaller crop and tight stocks, while volumes are down on smaller shipments to Latin America and the Middle East.

Oilseeds and products are projected up slightly to \$33.1 billion as higher soybeans more than offset declines in soybean meal and oil. Record U.S. soybean production is driving record exports. Although unit values are lower on larger global supplies, these are expected to spur additional demand for U.S. soybeans, pushing total soybean export value up \$200 million to \$24.1 billion. Competition from South America and demand in China remain key drivers in the forecast.

Cotton exports are forecast at \$4.8 billion, up \$300 million. Stronger end-of-season 2016/17 demand has firmed up export unit values ahead of the arrival of the 2017 new crop. In addition, a larger crop is undergirding higher export volumes, but these will be limited by larger crops in most major producing countries. Forecast export volume is up 100,000 tons to 3.2 million.

Livestock, poultry, and dairy exports are raised \$200 million to \$29.7 billion due largely to beef, poultry, and animal byproducts. Beef is forecast up \$200 million to \$6.3 billion on higher volumes. Pork is forecast down \$200 million to \$5.2 billion as growing global supplies pressure prices. Strong demand will support prices for lard, tallow, and grease, buoying the value of these livestock byproduct shipments. Variety meat exports are forecast \$100 million lower to \$1.8 billion on both weaker global demand and larger U.S. supplies. Poultry and products are forecast \$100 million higher to \$5.0 billion, driven primarily by broiler meat, as higher prices more than offset lower volumes. The reduction in volumes is due to weaker demand in key markets. Dairy is down \$100 million to \$5.6 billion as global prices weaken and global competition intensifies.

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, 2014-2018

Commodity	Fiscal year				Forecast for fiscal year 2018	
	2014	2015	2016	2017	Aug.	Nov.
<b>VALUE</b>	--- Billion dollars ---					
Grains and feeds 1/	36.525	31.799	29.637	30.350	28.4	29.4
Wheat 2/	8.260	5.914	5.134	6.198	6.4	6.3
Rice	2.018	2.051	1.853	1.791	1.7	1.9
Coarse grains 3/	12.475	11.054	10.768	10.786	8.9	9.4
Corn	11.084	8.797	9.140	9.659	8.0	8.5
Feeds and fodders	9.033	8.109	7.436	7.178	7.0	7.5
Oilseeds and products	34.916	31.679	29.470	32.891	33.0	33.1
Soybeans	24.104	21.624	20.428	23.977	23.9	24.1
Soybean meal 4/	5.723	5.243	4.168	3.896	4.1	4.0
Soybean oil	0.812	0.773	0.843	0.954	0.9	0.8
Livestock, poultry, and dairy	33.807	29.251	25.531	28.874	29.5	29.7
Livestock products	19.994	18.214	16.444	18.651	18.9	19.1
Beef and veal 5/	6.038	5.850	5.197	6.175	6.1	6.3
Pork 5/	5.751	4.976	4.737	5.227	5.4	5.2
Beef and pork variety meats 5/	1.531	1.532	1.587	1.803	1.9	1.8
Hides, skins, and furs	2.989	2.626	1.888	1.932	2.0	2.0
Poultry and products	6.408	5.480	4.551	4.899	4.9	5.0
Broiler meat 5/ 6/	4.097	3.359	2.780	3.011	2.9	3.0
Dairy products	7.406	5.557	4.536	5.324	5.7	5.6
Tobacco, unmanufactured	1.114	1.250	1.042	1.024	1.0	1.0
Cotton	4.598	4.133	3.443	5.850	4.5	4.8
Seeds	1.721	1.570	1.601	1.741	1.8	1.8
Horticultural products 7/	33.340	33.989	32.868	33.896	34.5	34.5
Fruits and vegetables, fresh	7.425	7.197	6.998	7.195	7.0	7.0
Fruits and vegetables, processed	7.611	7.382	7.387	7.417	7.5	7.5
Tree nuts, whole and processed	8.027	8.811	7.548	8.118	8.5	8.5
Sugar and tropical products 8/	6.290	6.076	6.018	5.828	5.8	5.8
Major bulk products 9/	52.568	46.026	42.669	49.626	46.4	47.5
Total	152.326	139.761	129.617	140.471	139.0	140.0
<b>VOLUME</b>	--- Million metric tons ---					
Wheat 2/	27.091	21.398	22.532	28.034	25.3	26.4
Rice	3.374	3.989	3.822	4.080	3.9	3.8
Coarse grains 3/	56.625	56.314	59.114	61.596	52.6	54.1
Corn	50.599	46.758	51.092	55.434	47.0	48.5
Feeds and fodders	27.812	21.590	22.197	21.716	21.9	22.8
Soybeans	45.207	50.374	54.226	60.082	60.6	61.4
Soybean meal 4/	10.504	11.891	10.844	10.524	11.1	11.1
Soybean oil	0.852	0.914	1.017	1.160	1.0	1.0
Beef and veal 5/	0.869	0.774	0.802	0.934	1.0	1.0
Pork 5/	1.763	1.690	1.733	1.880	2.0	2.0
Beef and pork variety meats 5/	0.743	0.695	0.765	0.842	0.9	0.9
Broiler meat 5/ 6/	3.353	2.995	2.912	3.045	3.2	3.1
Tobacco, unmanufactured	0.152	0.177	0.156	0.150	0.2	0.2
Cotton	2.177	2.514	2.191	3.278	3.1	3.2
Major bulk products 9/	134.624	134.766	142.039	157.220	145.7	149.1

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/ Includes soy flours made from protein meals. 5/ Includes chilled, frozen, and processed meats. 6/ Includes only federally inspected product. 7/ Includes food preparations, essential oils and wine. 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 Census Bureau, U.S. Department of Commerce.

## Regional Exports

### **Outlook for Fiscal 2018**

Agricultural exports in fiscal 2018 are forecast at \$140.0 billion, \$1.0 billion higher than the August forecast, largely due to improved corn and DDGs outlook.

### **Asia**

The forecast for Vietnam is raised \$400 million to \$2.8 billion, largely due to the reopening of the DDGS market to U.S. supplies and higher expected sales of cotton.

The forecast for the rest of Asia is unchanged. China remains the largest U.S. market at \$22.6 billion, which is \$600 million higher than fiscal 2017.

### **Western Hemisphere**

Mexico is forecast up \$400 million to \$19.2 billion, as sharply lower local sorghum supplies are expected to boost U.S. corn sales to meet Mexico's feed demand.

Exports to Canada are unchanged at \$21.2 billion, which is \$800 million higher than fiscal 2017.

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

Exports to Europe are unchanged at \$12.8 billion. The EU is forecast at \$11.8 billion, which is the same as in August but \$200 million higher than fiscal 2017.

The forecast for Africa remains at \$3.6 billion, and exports to the Middle East are unchanged at \$5.8 billion.

Table 4--U.S. agricultural exports: Value by region, 2014-2018 1/

Country and region	Fiscal year				Share of 2017 total	Forecast	
	2014	2015	2016	2017		Fiscal year 2018	
VALUE	-- \$ Billion --				Percent	-- \$ Billion --	
						Aug.	Nov.
Asia	66.636	60.748	54.796	63.361	45.1	61.5	61.9
East Asia	53.492	47.972	42.051	48.118	34.3	47.5	47.5
Japan	13.366	11.694	10.603	11.844	8.4	11.1	11.1
China	25.695	22.612	19.168	21.951	15.6	22.6	22.6
Hong Kong	4.052	3.933	3.505	4.044	2.9	3.8	3.8
Taiwan	3.492	3.293	3.073	3.404	2.4	3.3	3.3
South Korea	6.870	6.422	5.693	6.868	4.9	6.7	6.7
Southeast Asia	11.444	10.630	10.263	11.810	8.4	11.0	11.4
Indonesia	2.964	2.442	2.376	2.966	2.1	2.9	2.9
Philippines	2.775	2.417	2.470	2.627	1.9	2.5	2.5
Malaysia	1.010	0.862	0.798	0.904	0.6	0.9	0.9
Thailand	1.613	1.713	1.465	1.780	1.3	1.7	1.7
Vietnam	2.230	2.406	2.354	2.566	1.8	2.4	2.8
South Asia	1.700	2.146	2.482	3.432	2.4	3.0	3.0
India	0.988	1.109	1.244	1.506	1.1	1.5	1.5
Western Hemisphere	56.673	53.734	51.457	52.886	37.6	53.8	54.2
North America	41.273	39.426	38.010	38.986	27.8	40.0	40.4
Canada	21.783	21.421	20.393	20.362	14.5	21.2	21.2
Mexico	19.489	18.005	17.617	18.624	13.3	18.8	19.2
Caribbean	3.659	3.363	3.278	3.517	2.5	3.5	3.5
Dominican Republic	1.293	1.179	1.109	1.233	0.9	1.2	1.2
Central America	3.776	3.828	3.784	3.813	2.7	3.8	3.8
South America	7.965	7.118	6.385	6.570	4.7	6.5	6.5
Brazil	1.642	0.778	0.802	0.726	0.5	1.0	1.0
Colombia	2.311	2.583	2.257	2.556	1.8	2.5	2.5
Peru	0.958	1.247	1.138	1.188	0.8	1.1	1.1
Venezuela	1.323	0.897	0.653	0.441	0.3	0.3	0.3
Europe/Eurasia	14.824	13.606	12.815	12.614	9.0	12.8	12.8
European Union-28 2/	12.695	12.309	11.664	11.607	8.3	11.8	11.8
Other Europe 3/	0.569	0.663	0.613	0.622	0.4	0.7	0.7
FSU-12 4/	1.561	0.634	0.538	0.386	0.3	0.3	0.3
Russia	1.165	0.406	0.370	0.188	0.1	0.2	0.2
Middle East	6.698	5.824	5.469	6.099	4.3	5.8	5.8
Turkey	2.177	2.090	1.573	1.366	1.0	1.4	1.4
Saudi Arabia	1.405	1.269	1.293	1.590	1.1	1.4	1.4
Africa	5.205	3.772	3.257	3.618	2.6	3.6	3.6
North Africa	2.833	1.860	1.605	1.719	1.2	1.8	1.8
Egypt	1.858	1.092	0.744	0.776	0.6	0.8	0.8
Sub-Saharan Africa	2.373	1.912	1.652	1.899	1.4	1.8	1.8
Nigeria	0.901	0.684	0.397	0.501	0.4	0.5	0.5
Oceania	2.118	2.076	1.822	1.892	1.3	1.9	1.9
Transshipments via Canada 5/	0.172	0.000	0.000	0.002	0.0	0.0	0.0
<b>Total</b>	<b>152.326</b>	<b>139.761</b>	<b>129.617</b>	<b>140.471</b>	<b>100.0</b>	<b>139.0</b>	<b>140.0</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 3 Baltic Republics.

5/ Transshipments through Canada have not been allocated to final destination, but are included in the total.

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



## Import Products

Agricultural imports in fiscal year 2018 are forecast to increase to \$117.0 billion, \$1.5 billion above the August forecast but \$2.1 billion below the total value of imports in fiscal year 2017. The expected increases in imports of animal products are largely responsible for the upward adjustment in the forecast, but higher projected supplies of horticultural and grains imports also contributed to the change.

Livestock, poultry and dairy imports are raised \$600 million to \$15.8 billion as increases in red meats and live animals more than offset declines in dairy products and poultry and products. Beef is raised \$200 million to \$4.9 billion on higher volumes as demand for processing grade beef remains strong. Cattle and calves are raised \$400 million to \$1.7 billion as robust demand spurs increased shipments. Poultry and products and cheese are forecast lower on declining prices.

Horticultural product imports are expected to increase \$300 million from the previous forecast in fiscal year 2018 to \$55.9 billion, though this is nearly \$900 million below the fiscal year 2017 total. Fresh fruit imports are expected to be \$200 million larger in fiscal 2018 than previously expected due to larger volumes. The forecast for tree nuts has also been increased, by \$100 million, as the trend of high demand for foreign cashews and pecans is expected to continue. Fresh vegetable imports are expected to drop \$100 million from the previous forecast, as falling average prices drag down total values despite steady volumes.

U.S. imports of sugar and tropical products are forecast to be worth \$23.3 billion in fiscal year 2018, a \$100 million upward adjustment from the previous forecast but \$600 million below fiscal year 2017. Coffee products are expected to be worth \$6.4 billion due to larger than previously expected quantities imported. Cocoa product imports are now projected to be worth \$5.2 billion, a \$100 million decrease from the previous forecast, due to lower unit values than fiscal year 2017.

Imports of grains and feed products are forecast to grow by \$200 million from the previous forecast to \$11.3 billion, due to projected increases in U.S. demand for rice and higher expected prices for high protein wheat. Total oilseeds and products imports for fiscal 2018 are expected to remain unchanged.

Table 5--U.S. agricultural imports: Value and volume by commodity, fiscal years 2014-18

Commodity	Fiscal year				Forecast	
	2014	2015	2016	2017	Fiscal year 2018	
					Aug.	Nov.
<b>VALUE</b>	<i>-- \$ Billion --</i>					
Livestock, dairy, & poultry	16.042	19.458	16.587	16.133	15.2	15.8
Livestock and meats	12.063	15.154	12.361	12.134	11.1	11.9
Cattle and calves	2.164	2.699	1.748	1.540	1.3	1.7
Swine	0.410	0.370	0.334	0.325	0.3	0.3
Beef and veal	4.730	7.208	5.379	5.124	4.7	4.9
Pork	1.690	1.708	1.706	1.771	1.5	1.6
Dairy products	3.277	3.491	3.360	3.252	3.2	3.2
Cheese	1.230	1.314	1.275	1.168	1.4	1.3
Grains and feed	10.856	10.924	10.923	11.334	11.1	11.3
Grain products	6.513	6.881	7.288	7.765	7.7	7.7
Oilseeds and products	9.895	8.750	8.437	9.325	8.8	8.8
Vegetable oils	5.369	5.351	5.407	6.242	6.0	6.0
Horticulture products	47.002	49.823	53.071	56.753	55.6	55.9
Fruits, fresh	9.443	10.184	11.227	12.688	12.2	12.4
Fruits, processed	4.733	5.138	5.121	5.121	5.2	5.2
Fruit juices	1.840	1.839	1.761	1.938	1.8	1.8
Nuts, whole and processed	2.077	2.587	2.607	3.198	3.1	3.2
Vegetables, fresh	6.658	6.905	7.998	7.692	7.8	7.7
Vegetables, processed	4.346	4.458	4.648	5.048	5.1	5.1
Wine	5.504	5.511	5.623	6.070	6.0	6.0
Malt beer	4.091	4.363	4.812	4.970	4.9	4.9
Essential oils	2.986	3.347	3.359	3.559	3.5	3.5
Cut flowers & nursery stock	1.713	1.734	1.813	1.914	1.9	1.9
Sugar & tropical products	23.230	23.532	22.209	23.876	23.2	23.3
Sweeteners & products	4.729	4.876	4.646	4.666	4.7	4.7
Confections	1.663	1.643	1.734	1.770	1.7	1.7
Cocoa and products	4.693	4.703	4.880	5.152	5.3	5.2
Coffee and products	6.015	6.400	5.934	6.618	6.3	6.4
Rubber, natural	2.138	1.575	1.306	1.700	1.6	1.6
Other imports 1/	2.233	1.748	1.811	1.718	1.8	1.8
<b>Total agricultural imports</b>	<b>109.258</b>	<b>114.235</b>	<b>113.037</b>	<b>119.140</b>	<b>115.5</b>	<b>117.0</b>
<b>VOLUME</b>	<i>--- Million metric tons ---</i>					
Wine 2/	1.148	1.166	1.199	1.287	1.3	1.3
Malt beer 2/	3.430	3.557	3.858	3.974	3.9	3.9
Fruit juices 2/	4.323	4.516	4.513	4.629	4.5	4.5
Cattle and calves 3/	2.251	2.320	1.737	1.766	1.6	1.9
Swine 3/	4.788	5.493	5.764	5.616	5.9	5.6
Beef and veal	0.887	1.195	1.004	1.005	0.9	1.0
Pork	0.414	0.492	0.492	0.489	0.4	0.5
Fruits, fresh	10.830	11.187	11.641	12.182	12.1	12.2
Fruits, processed	1.673	1.894	1.902	1.811	1.9	1.9
Vegetables, fresh	6.416	6.497	7.181	7.360	7.4	7.3
Vegetables, processed	3.322	3.457	3.600	3.819	3.9	3.9
Vegetable oils	4.175	4.410	4.692	5.919	5.1	5.1
Cocoa and products	1.329	1.293	1.299	1.495	1.5	1.5
Coffee and products	1.589	1.533	1.638	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: USDA and U.S. Census Bureau, U.S. Department of Commerce.

## Regional Imports

Regional imports from the Western Hemisphere are projected to increase by \$1.2 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 \$23.6 billion, \$500 million above the August forecast, due to increases in expected imports of fresh fruits, tree nuts, and cattle that more than offset slightly lower supplies of fresh vegetables. The value of Canadian agricultural products sold to the United States is expected to increase by \$600 million to \$22.4 billion, due to upward adjustments to U.S. imports of livestock and meats as well as bulk grains such as wheat.

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 \$2.5 billion, a \$100 million increase, due to a rise in expected sales of beef.

Imports from Asia are forecast up \$200 million from the previous projection to \$18.7 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 Vietnam, for instance, were increased by \$100 million, primarily due to increased sales of tree nuts.

Imports from South America are projected to equal the August forecast at \$13.3 billion, a \$600 million drop from fiscal year 2017. Chile 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 remain steady at \$21.2 billion, and therefore the group of member states is expected to remain the third-largest supplier to the United States. Imports from Africa and the Middle East are also expected to remain unchanged.

Table 6--U.S. agricultural imports: Value by region, fiscal years 2014-18

Region and country	Fiscal year				Forecast	
	2014	2015	2016	2017	Fiscal year 2018	
					Aug.	Nov.
	-- \$ Billion --					
<b>VALUE</b>						
Western Hemisphere	60.628	62.452	63.123	65.971	64.1	65.3
Canada	22.845	22.391	21.431	21.984	21.8	22.4
Mexico	18.878	20.680	22.507	24.070	23.1	23.6
Central America	4.762	5.050	5.097	5.454	5.3	5.4
Costa Rica	1.552	1.503	1.596	1.607	1.6	1.6
Guatemala	1.826	1.944	1.877	2.097	2.0	2.1
Other Central America	1.384	1.602	1.624	1.750	1.7	1.7
Caribbean	0.504	0.580	0.564	0.588	0.6	0.6
South America	13.639	13.752	13.524	13.874	13.3	13.3
Argentina	1.567	1.457	1.418	1.362	1.3	1.3
Brazil	3.675	3.534	3.301	3.327	3.2	3.2
Chile	2.744	2.808	3.022	2.993	3.0	2.9
Colombia	2.358	2.472	2.292	2.591	2.3	2.4
Peru	1.557	1.589	1.742	1.977	1.9	1.9
Other South America	1.740	1.890	1.748	1.625	1.6	1.6
Europe and Eurasia	20.018	21.158	21.926	22.818	22.8	22.8
European Union-28	18.741	19.708	20.397	21.371	21.2	21.2
Other Europe	1.277	1.450	1.529	1.448	1.5	1.5
Asia	18.708	18.739	17.562	19.694	18.5	18.7
East Asia	5.757	5.799	5.795	6.119	6.0	6.0
China	4.340	4.331	4.254	4.465	4.4	4.4
Other East Asia	1.417	1.468	1.541	1.654	1.6	1.6
Southeast Asia	9.723	9.668	9.369	10.728	10.0	10.2
Indonesia	3.094	2.912	2.803	3.587	3.2	3.2
Malaysia	1.502	1.251	1.063	0.964	0.9	0.9
Thailand	2.242	2.293	2.297	2.387	2.3	2.4
Vietnam	1.659	1.877	1.996	2.401	2.3	2.4
Other Southeast Asia	1.227	1.335	1.210	1.390	1.3	1.3
South Asia	3.228	3.273	2.397	2.847	2.5	2.5
India	2.972	2.952	2.096	2.525	2.2	2.2
Oceania	5.906	7.766	6.073	5.812	5.4	5.6
Australia	3.345	4.653	3.382	3.103	3.0	3.1
New Zealand	2.461	2.996	2.580	2.592	2.4	2.5
Africa	2.670	2.706	2.748	3.295	3.0	3.0
Sub-Saharan	2.330	2.223	2.334	2.935	2.6	2.6
Ivory Coast	1.137	0.918	1.005	1.182	1.2	1.2
Middle East	1.213	1.161	1.446	1.366	1.4	1.4
Turkey	0.784	0.737	0.985	0.888	0.9	0.9
<b>World total</b>	<b>109.258</b>	<b>114.235</b>	<b>113.037</b>	<b>119.140</b>	<b>115.5</b>	<b>117.0</b>

Totals may not add due to rounding.

Sources: USDA, 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 2017					Forecast accuracy Fiscal 2017					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	3	2	6	4	0	X	X	-	X	X	80
Wheat	18	13	1	0	3	-	-	X	X	X	60
Rice	5	5	5	1	1	-	-	X	X	X	60
Coarse grains	47	46	47	48	46	-	-	-	-	-	0
Corn	3	1	2	3	0	X	X	X	X	X	100
Feeds and fodders	3	3	17	14	3	X	X	-	-	X	60
Oilseeds and products	6	6	4	4	1	-	-	X	X	X	60
Soybeans	12	9	6	6	2	-	-	-	-	X	20
Soybean meal	13	8	3	6	1	-	-	X	-	X	40
Soybean oil	2	11	14	10	6	X	-	-	-	-	20
Livestock, poultry, and dairy	11	8	3	1	0	-	-	X	X	X	60
Livestock products	13	12	5	0	0	-	-	X	X	X	60
Beef and veal	14	14	6	3	1	-	-	-	X	X	40
Pork	10	10	4	3	1	-	-	X	X	X	60
Beef and pork variety meats	17	11	2	5	3	-	-	X	-	X	40
Hides, skins, and furs	2	2	5	4	1	X	X	X	X	X	100
Poultry and products	2	4	2	4	0	X	X	X	X	X	100
Broiler meat	0	4	3	6	2	X	X	X	-	X	80
Dairy products	10	0	3	1	2	-	X	X	X	X	80
Tobacco, unmanufactured	7	7	7	2	2	-	-	-	X	X	40
Cotton	28	25	15	8	1	-	-	-	-	X	20
Planting seeds	14	14	14	3	3	-	-	-	X	X	40
Horticultural products	0	0	0	1	1	X	X	X	X	X	100
Fruits and vegetables, fresh	5	5	5	5	5	-	-	-	-	-	0
Fruits and veget., processed	2	2	2	2	1	X	X	X	X	X	100
Tree nuts	11	11	11	5	2	-	-	-	X	X	40
Sugar and tropical products	3	3	3	3	3	X	X	X	X	X	100
Major bulk products	11	9	5	5	1	-	-	-	X	X	40
Total agricultural exports	5	5	3	2	0	-	X	X	X	X	80
Average error & accuracy	10	9	7	5	3	34%	38%	59%	69%	90%	58
<b>Export volume</b>											
Wheat	11	9	4	0	3	-	-	X	X	X	60
Rice	0	2	0	0	3	X	X	X	X	X	100
Coarse grains	0	2	1	1	1	X	X	X	X	X	100
Corn	1	2	2	1	1	X	X	X	X	X	100
Feeds and fodders	1	1	4	0	5	X	X	X	X	X	100
Soybeans	13	7	7	7	3	-	-	-	-	X	20
Soybean meal	5	4	0	5	0	-	X	X	X	X	80
Soybean oil	5	14	14	14	5	-	-	-	-	-	0
Beef and veal	9	8	2	4	0	-	-	X	X	X	60
Pork	4	4	1	6	2	X	X	X	-	X	80
Beef and pork variety meats	7	3	6	7	6	-	X	-	-	-	20
Broiler meat	4	3	3	2	1	X	X	X	X	X	100
Tobacco, unmanufactured	33	33	33	33	33	-	-	-	-	-	0
Cotton	24	21	15	5	1	-	-	-	-	X	20
Major bulk products	7	4	3	3	1	-	X	X	X	X	80
Average error & accuracy	8	8	6	6	4	40%	60%	67%	60%	80%	61

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 2017					Forecast accuracy Fiscal 2017					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	9	8	5	4	1	-	-	-	X	X	40
East Asia	6	5	3	1	0	-	-	X	X	X	60
Japan	7	7	5	3	3	-	-	-	X	X	40
China	2	1	2	2	2	X	X	X	X	X	100
Hong Kong	11	11	11	11	6	-	-	-	-	-	0
Taiwan	9	9	3	3	3	-	-	X	X	X	60
South Korea	11	11	7	2	5	-	-	-	X	X	40
Southeast Asia	14	14	9	5	3	-	-	-	-	X	20
Indonesia	16	16	9	2	5	-	-	-	X	X	40
Philippines	9	9	5	5	5	-	-	X	X	X	60
Malaysia	0	0	0	0	0	X	X	X	X	X	100
Thailand	10	10	10	10	4	-	-	-	-	X	20
Vietnam	18	18	6	5	5	-	-	-	-	-	0
South Asia	30	30	27	24	7	-	-	-	-	-	0
India	20	20	14	14	6	-	-	-	-	-	0
Western Hemisphere	1	0	0	0	1	X	X	X	X	X	100
North America	1	2	2	1	1	X	X	X	X	X	100
Canada	4	5	5	3	3	X	X	X	X	X	100
Mexico	3	2	2	1	1	X	X	X	X	X	100
Caribbean	3	3	3	3	0	X	X	X	X	X	100
Dominican Republic	11	11	11	11	3	-	-	-	-	X	20
Central America	3	3	3	3	0	X	X	X	X	X	100
South America	7	7	6	3	0	-	-	-	X	X	40
Brazil	10	10	24	24	38	-	-	-	-	-	0
Colombia	10	10	10	2	2	-	-	-	X	X	40
Peru	16	16	16	16	7	-	-	-	-	-	0
Venezuela	9	9	9	9	9	-	-	-	-	-	0
Europe and Eurasia	2	3	3	1	1	X	X	X	X	X	100
European Union-28	2	3	3	1	1	X	X	X	X	X	100
Other Europe	13	13	13	13	13	-	-	-	-	-	0
FSU-12	4	4	4	4	22	X	X	X	X	-	80
Russia	59	59	59	59	6	-	-	-	-	-	0
Middle East	10	10	10	7	0	-	-	-	-	X	20
Turkey	5	5	5	3	17	X	X	X	X	-	80
Saudi Arabia	25	25	25	18	6	-	-	-	-	-	0
Africa	14	12	12	12	0	-	-	-	-	X	20
North Africa	19	13	13	13	5	-	-	-	-	X	20
Egypt	3	3	3	3	3	X	X	X	X	X	100
Sub-Saharan Africa	10	10	10	10	5	-	-	-	-	-	0
Nigeria	20	20	20	20	0	-	-	-	-	X	20
Oceania	0	0	0	0	0	X	X	X	X	X	100
Average error and accuracy	11	10	9	8	5	34%	34%	41%	56%	68%	47

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 2017					Forecast accuracy Fiscal 2017					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	2	3	2	3	1	X	X	X	X	X	100
Livestock and meats	4	8	6	7	3	X	-	-	-	X	40
Cattle and calves	10	9	3	3	3	-	-	X	X	X	60
Swine	23	8	8	8	8	-	-	-	-	-	0
Beef and veal	8	8	6	8	4	-	-	-	-	X	20
Pork	2	15	10	10	4	X	-	-	-	X	40
Dairy products	1	8	8	5	1	X	-	-	X	X	60
Cheese	20	20	20	20	3	-	-	-	-	X	20
Grains and feed	5	5	4	4	3	X	X	X	X	X	100
Grain products	7	7	5	5	3	-	-	X	X	X	60
Oilseeds and products	13	11	8	6	3	-	-	-	-	X	20
Vegetable oils	15	13	10	7	5	-	-	-	-	-	0
Horticulture products	5	6	4	5	3	-	-	X	X	X	60
Fruits, fresh	11	11	8	8	5	-	-	-	-	-	0
Fruits, preserved	5	0	2	0	0	-	X	X	X	X	80
Fruit juices	7	12	7	7	7	-	-	-	-	-	0
Nuts and preparations	12	12	9	9	6	-	-	-	-	-	0
Vegetables, fresh	1	1	3	1	1	X	X	X	X	X	100
Vegetables, processed	7	7	5	3	1	-	-	X	X	X	60
Wine	6	6	6	4	3	-	-	-	X	X	40
Malt beer	1	3	1	1	1	X	X	X	X	X	100
Essential oils	2	2	2	2	2	X	X	X	X	X	100
Cut flowers and nursery stock	6	6	6	6	1	-	-	-	-	X	20
Sugar and tropical products	3	5	4	2	1	X	X	X	X	X	100
Sweeteners and products	5	1	3	1	1	-	X	X	X	X	80
Confections	4	4	2	4	4	X	X	X	X	X	100
Cocoa and products	1	1	3	3	3	X	X	X	X	X	100
Coffee beans and products	3	6	6	3	2	X	-	-	X	X	60
Natural rubber	24	24	24	12	6	-	-	-	-	-	0
Other imports	1	5	5	5	5	X	X	X	X	X	100
Total agricultural imports	5	6	4	4	2	X	-	X	X	X	80
Average error and accuracy	7	8	6	5	3	45%	35%	52%	61%	81%	55
<b>Import volume</b>											
Wine (HL)	7	7	7	7	1	-	-	-	-	X	20
Malt beer (HL)	4	4	2	2	2	X	X	X	X	X	100
Fruit juices (HL)	3	5	3	3	3	X	X	X	X	X	100
Cattle and calves	2	9	4	4	2	X	-	X	X	X	80
Swine	5	5	3	3	3	-	-	X	X	X	60
Beef and veal	0	10	10	10	0	X	-	-	-	X	40
Pork	2	2	2	2	2	X	X	X	X	X	100
Fruits--fresh	3	5	2	2	1	X	X	X	X	X	100
Fruits--processed	10	5	5	5	5	-	X	X	X	X	80
Vegetables--fresh	5	4	2	2	2	X	X	X	X	X	100
Vegetables--processed	6	6	3	3	0	-	-	X	X	X	60
Vegetable oils	21	19	17	16	16	-	-	-	-	-	0
Cocoa and products	13	13	6	6	0	-	-	-	-	X	20
Coffee beans and products	0	5	5	0	5	X	-	-	X	-	40
Average error and accuracy	6	7	5	5	3	57%	43%	64%	71%	86%	64

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 2017					Forecast accuracy Fiscal 2017					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	4	5	3	4	2	X	-	X	X	X	80
Canada	2	1	1	1	1	X	X	X	X	X	100
Mexico	6	9	7	7	5	-	-	-	-	X	20
Central America	8	6	6	6	3	-	-	-	-	X	20
Costa Rica	0	0	0	0	0	X	X	X	X	X	100
Guatemala	9	9	9	9	5	-	-	-	-	X	20
Other Central America	14	9	9	9	3	-	-	-	-	X	20
Caribbean	15	15	2	2	2	-	-	X	X	X	60
South America	2	4	1	2	1	X	X	X	X	X	100
Argentina	5	5	5	5	5	-	X	X	X	X	80
Brazil	7	7	1	1	2	-	-	X	X	X	60
Chile	0	7	7	0	0	X	-	-	X	X	60
Colombia	4	11	11	7	4	X	-	-	-	X	40
Peru	4	14	4	4	4	X	-	X	X	X	
Other South America	11	5	5	5	2	-	X	X	X	X	80
Europe and Eurasia	2	1	1	1	1	X	X	X	X	X	100
European Union-27	3	2	2	2	1	X	X	X	X	X	100
Other Europe	11	4	4	4	4	-	X	X	X	X	80
Asia	12	13	11	10	6	-	-	-	-	-	0
East Asia	5	8	7	5	4	-	-	-	-	X	20
China	4	8	6	4	4	X	-	-	X	X	60
Other East Asia	9	9	9	9	3	-	-	-	-	X	20
Southeast Asia	14	14	11	10	6	-	-	-	-	-	0
Indonesia	25	25	22	16	8	-	-	-	-	-	0
Malaysia	7	7	7	7	7	-	-	-	-	-	0
Thailand	4	4	4	4	4	X	X	X	X	X	100
Vietnam	13	13	4	4	4	-	-	X	X	X	
Other Southeast Asia	14	14	14	14	6	-	-	-	-	-	0
South Asia	23	23	23	19	9	-	-	-	-	-	0
India	25	25	25	21	9	-	-	-	-	-	0
Oceania	20	12	8	2	0	-	-	-	X	X	40
Australia	32	19	16	6	3	-	-	-	-	X	20
New Zealand	12	8	4	0	0	-	-	X	X	X	60
Africa	15	15	12	12	6	-	-	-	-	-	0
Sub-Saharan Africa	18	18	15	15	8	-	-	-	-	-	0
Ivory Coast	15	15	7	7	10	-	-	-	-	-	0
Middle East	2	2	2	2	2	X	X	X	X	X	100
Turkey	1	1	1	1	1	X	X	X	X	X	100
Average error & accuracy	10	10	8	6	4	34%	29%	45%	53%	74%	46

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



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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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