Managing Risk in the 21st CENTURY

Crystal Gateway Marriott Hotel
Arlington, Virginia
February 21-22, 2013

www.usda.gov/oce/forum
Welcome to the 2013 Agricultural Outlook Forum

USDA’s annual Forum brings together producers, policymakers, and business, government, and industry leaders with a unique opportunity to meet, exchange ideas, and discuss timely issues at the forefront of America’s agriculture.

The USDA Agricultural Outlook Forum Student Diversity Program targets 30 students (20 undergraduates and 10 graduates) who come from Land-Grant Colleges and Universities, Hispanic-Serving Institutions, and American Association of State Colleges of Agriculture and Renewable Resources Institutions throughout the Nation. The students chosen to attend the Forum have earned this opportunity through a stiff competitive essay process.

Thank you University of Maryland Eastern Shore, CHS Inc., and Farm Credit who along with USDA’s Economic Research Service have supported the USDA Agricultural Outlook Forum Student Diversity Program since its inception in 2007. USDA’s Office of the Chief Economist, National Institute of Food and Agriculture, Agricultural Research Service, and Natural Resources Conservation Service have also helped make this program possible and a success.

Former program winners have said that the Forum “opened their eyes” to a larger world and better prepared them for more advanced achievements in agriculture. Today, USDA is proud that a significant number of Diversity Program participants are full-time employees of the Department.

Thank you Forum speakers for taking the time to share your experiences and expertise on the future of agriculture.

Thank you attendees for making the Forum possible with your commitment and participation in this annual event.

Gerald A. Bange
Program Chair
Managing Risk in the 21st Century

Plenary Speakers

Welcome
USDA Deputy Secretary of Agriculture
Kathleen Merrigan

Keynote Address
USDA Secretary of Agriculture
Tom Vilsack

2013 Agricultural & Foreign Trade Outlooks
USDA Chief Economist
Joseph Glauber

Distinguished Guest
Former Senator
Thomas A. Daschle
Senior Policy Advisor,
DLA Piper

Plenary Panel: Managing Risk in Today’s Markets

Moderator:

Distinguished Panelists:

Mike Adams, AgriTalk Radio
Bryan T. Durkin, Chief Operating Officer, CME Group
David Baudler, President, Cargill AgHorizons
Scott H. Irwin, Agricultural Marketing, University of Illinois

U.S. Energy Market Outlook

Adam Sieminski, Administrator
U.S. Energy Information Administration
Forum Dinner Speaker 6:30 p.m.

For coverage of the Ag Outlook Forum, follow @ USDA and #AgOutlook
You Are Invited To Attend These Networking Opportunities:

### February 21 –

<table>
<thead>
<tr>
<th>Morning Coffee</th>
<th>Grand Ballroom Foyer</th>
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<tr>
<th>Networking Luncheon</th>
<th>Salons A, B, C, D &amp; E</th>
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<tr>
<th>Reception</th>
<th>Exhibit Hall Salons F, G &amp; H</th>
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<tr>
<th>Forum Dinner</th>
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### February 22 –

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<tr>
<th>Women in Agriculture – Networking</th>
<th>Skywalk</th>
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<td>11:30 a.m. – 12:00 noon</td>
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<tr>
<th>Luncheons</th>
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<tr>
<td>Fruits &amp; Vegetables</td>
<td>12:15 p.m. – 1:30 p.m.</td>
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<tr>
<td>Sugar &amp; Sweeteners</td>
<td>Salons I &amp; II</td>
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<tr>
<td>Cotton &amp; Fibers</td>
<td>Salons V &amp; VI</td>
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<tr>
<td>Grains &amp; Oilseeds</td>
<td>Salons C, D &amp; E</td>
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<tr>
<td>Livestock &amp; Dairy</td>
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<td>Salons A, B, J &amp; K</td>
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Webcast of plenary session will be posted after 6 p.m. February 21
Speaker presentations will be posted after 6 p.m. February 22

**Women in Agriculture – Speed Networking Event**

11:30 a.m. – 12:00 p.m.
Friday, February 22, 2013
Skywalk

Guests of Honor will speak briefly at 11:45 a.m.
Everyone Welcome!
### Thursday, February 21

**Registration**  
(Wednesday Evening Early Onsite Registration 5-8 p.m.)

**Welcome**  
8:00 a.m.

**2013 Agricultural Economic & Foreign Trade Outlooks**  
8:05 a.m. – 8:30 a.m.

**Keynote Address**  
8:30 a.m. - 9:00 a.m.

**Distinguished Guest Speaker**  
9:00 a.m. – 9:30 a.m.

**Question & Answer Period**  
9:30 a.m. – 10:00 a.m.

**Coffee Break & Exhibit Hall Opens**  
10:00 a.m. – 10:30 a.m.

**Plenary Panel: Managing Risk in Today’s Markets**  
10:30 a.m. – 12:00 noon

**Networking Luncheon**  
12:30 p.m. -1:30 (60-minutes)  
Salons A, B, C, D, E, J & K + Skywalk

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### Concurrent Sessions

**1:45 p.m. – 3:15 p.m.**

**Food Price & Farm Income Outlooks**

- **Food Price Outlook for 2013**  
  *Salon IV*

- **Farm Income Outlook for 2013**  
  *Salon IV*

**Managing Risk**

- **Threats to Forests & Natural Resources**  
  *Salon II*

- **Managing Financial Risk in Agriculture**  
  *Salons V & VI*

**International Trade**

- **Challenges in Trading with the European Union**  
  *Salon III*

- **Prospects for Export Growth in the MIST Countries**  
  *Salon III*

**Food Safety Modernization**

- **Produce & Food Safety**  
  *Salon 1*

- **The Food Safety Revolution: How Far Have We Come? What’s Next?**  
  *Salon 1*

**Specialty Crops & Nutrition**

- **Promoting Nutritious Diets**  
  *Salons V & VI*

- **Showcasing Local Foods**  
  *Salon II*

**Cash Bar Reception**  
(Exhibit Area)

**Forum Dinner Speaker**  
*Salons III-IV* 6:30 p.m.

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### Friday, February 22

**7:00 a.m.**  
Registration

**10:00 a.m.**  
Exhibit Hall Opens  
*Salons F, G & H*

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### Concurrent Sessions

**8:00 a.m. - 9:30 a.m.**

**Conservation**

- **Drainage Water Management**  
  *Salon I & II*

- **Reducing Risks by Improving Soil Health**  
  *Salon I & II*

**Managing Risk**

- **Crop Insurance: A Global Perspective**  
  *Salons A, B, J & K*

- **Outlook for Transportation Risks**  
  *Salons A, B, J & K*

**International Trade**

- **Genetically Engineered Organisms: Trade & Domestic Use**  
  *Salons C, D & E*

- **Export Strategies of Farmer Co-ops**  
  *Salons V & VI*

**Commodity Outlooks**

- **Sugar Outlook**  
  *Salons V & VI*

- **Cotton Outlook**  
  *Salons C, D & E*

- **Livestock & Dairy Outlook**  
  *Salons III & IV*

**Commodity Outlooks**

- **Grains & Oilseeds Outlook**  
  *Salons III & IV*

- **Cotton & Fibers Outlook**  
  *Salons C, D & E*

- **Live stock & Dairy**  
  *Salons A, B, J & K*

**11:30 a.m. – 12:00 noon - Women in Agriculture – Networking – Skywalk**

**12:15 p.m. - 1:30 p.m.**

**Speaker Luncheons**

- **Fruits & Vegetables**  
  *Salons I & II*

- **Sugar & Sweeteners**  
  *Salons V & VI*

- **Cotton & Fibers**  
  *Salons C, D & E*

- **Grains & Oilseeds**  
  *Salons III & IV*

- **Livestock & Dairy**  
  *Salons A, B, J & K*

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### Adjourn
# Managing Risk in the 21st Century

**Thursday, February 21, 2013**

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<td>Plowing Ahead: Farming, Food Security, and the Future</td>
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<td>PLENARY PANEL: MANAGING RISK IN TODAY’S MARKETS</td>
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## BREAKOUT SESSIONS

### TRACK: FOOD PRICE & FARM INCOME OUTLOOKS

#### Food Price Outlook for 2013

**Salon IV**

This session will provide the latest perspective on food price inflation, the main factors that contribute to changes in food prices, and the consumer implications of rising food prices.

**Moderator:** Callie McAdams, Consultant, Informa Economics

**McLean, Virginia**

#### Outlook for U.S. Food Prices and Inflation in 2013

A presentation of the latest Economic Research Service outlook for retail food prices in general and across major food categories, recent historical trends in food expenditure patterns, and the relationship between food prices and inflation in the general economy.


#### The Effect of the Drought on Food Prices and Availability

In 2012, crop and livestock farmers experienced the most severe drought in decades, pushing many commodity prices to record highs. Food companies are facing higher input costs, and livestock farmers saw a dramatic increase in feed prices. Dr. Davis will discuss the link between this unusual harvest and the prices consumers pay for food, and he will discuss the longer term outlook for maintaining an affordable, abundant food supply.

**Todd Davis, Senior Economist, American Farm Bureau Federation Washington, DC**

#### Commodity Price Impacts on the Foodservice Industry

Unified Foodservice Purchasing Co-op is the purchasing agent for Yum! Brands (owners of Pizza Hut, Taco Bell, KFC, Long John Silver’s, and A&W). This presentation will focus on how the fast-food industry is affected by high commodity prices, and their risk-management strategies.

**Kurt Collins, Senior Director of Commodity Risk Management, Unified Foodservice Purchasing Co-op Louisville, Kentucky**

### TRACK: MANAGING RISK

#### Threats to Forests & Natural Resources

**Salon II**

This session will discuss the identification and response to rapidly changing events affecting our forests, including insects and fire, and what this means for agriculture and communities.

**Moderator:** Gerry Gray, Senior Vice President of Conservation Programs, American Forests

**Washington, DC**
1:45 p.m. – 3:15 p.m.

**Our Changing Forests: Implications for Agriculture and Communities**

Speaker addresses the changes occurring to U.S./North American forests (bark beetles, fires, invasive species, wind events, temperature) and the implications for agriculture and communities.

*Michael Goergen, Executive Vice President, Society of American Foresters*

Bethesda, Maryland

**Working Trees for Farms and Communities**

Speaker highlights case studies where trees help support agriculture and provide essential services for people in urban communities.

*Carlton Owen, President and CEO, U.S. Endowment for Forestry and Communities, Inc.*

Greenville, South Carolina

**What Forest Restoration Means for Agriculture and Communities**

Speaker addresses the need for forest restoration at a landscape scale using an all-lands approach and how this supports agriculture and communities.

*Wally Covington, Regents’ Professor and Director, Ecological Restoration Institute, Northern Arizona University, School of Forestry*

Flagstaff, Arizona

**TRACK: INTERNATIONAL TRADE**

### Challenges in Trading with the European Union

**Salon III**

The European Union (EU) is the fifth largest U.S. market, but growth in exports trails most major U.S. markets and U.S. market share fell over the past decade. Along with greater exportable supplies in competitors such as Russia, Brazil, and Argentina, the increasing number of EU trade barriers is impacting U.S. exports. Session speakers will address trade barriers related to distorting sustainability requirements, use of biotechnology regulations, and technical barriers such as antibiotic and hormone restrictions in meat.

*Moderator: Robert Riemenschneider, Deputy Administrator, Foreign Agricultural Service, USDA*

Washington, DC

**Outlook for Changes in EU Biotechnology Policy**

Constance Cullman, Dow AgroSciences, U.S. Federal Government Affairs Leader

Washington, DC

**The Impact of Sustainability Regulations on Trade Flows**

Jim Sutter, CEO, U.S. Soybean Export Council

Chesterfield, Missouri

**EU Trade Barriers and U.S. Meat Exports**

Thad Lively, Senior Vice President, U.S. Meat Export Federation

Denver, Colorado

**TRACK: FOOD SAFETY MODERNIZATION**

### Produce & Food Safety

**Salon I**

The produce industry (fresh and processed) has experienced several food safety incidents and recalls in recent years. The Food Safety Modernization Act (FSMA) was signed into law in January 2011, but it has not yet been fully implemented or funded. This session will focus on understanding the food safety risks that led to this new law, the new rules, and their implications for the produce industry firms, and voluntary industry initiatives to address food safety concerns.

*Moderator: Jason Huffman, Editor in Chief, Food Chemical News*

Arlington, Virginia

**The Food Safety Landscape for Fruits and Vegetables: The Consumer View**

What are the biggest food safety risks facing the produce industry? How much is FSMA expected to reduce food safety risks? How important are public policies versus private initiatives?

*Sarah A. Klein, Senior Staff Attorney, Food Safety Program, Center for Science in the Public Interest*

Washington, DC

**Industry-Led Food Safety Initiatives for Produce**

What has the produce industry (growers and shippers) done with respect to food safety standards and why? What industry-led initiatives are working? How would the existing efforts interact with FSMA?

*Hank Giclas, Senior Vice President, Strategic Planning, Science, and Technology, Western Growers Association*

Irvine, California

**Retail and Foodservice Food Safety Programs and Requirements**

What do foodservice and retail buyers require for food safety and why? How would the existing efforts interact with FSMA? Will buyers demand existing programs if they are more rigorous than FSMA? Will standards harmonize?

*Hilary Thesmar, Vice President, Food Safety Programs, Food Marketing Institute*

Arlington, Virginia

**TRACK: SPECIALTY CROPS & NUTRITION**

### Promoting Nutritious Diets

**Salons V & VI**

*Moderator: Sonny Ramaswamy, Director, National Institute of Food and Agriculture, USDA*

Washington, DC

**Cooperative Extension’s Role in Nutrition Education for Low-Income Families**

The Cooperative Extension helps limited-resource audiences in acquiring the knowledge, skills, attitudes, and changed behavior necessary for nutritionally sound diets that contribute to their health and well-being.

Contined on next page
personal development and the improvement of the family diet and nutritional well-being.

Daryl Buchholz, Associate Director of Extension and Applied Research, Kansas State University
Manhattan, Kansas

Technology Trends for 21st Century Nutrition
Speaker will discuss the use of social media tools to extend and enhance programmatic efforts in nutrition education and practices.
Joanne Kinsey, Family & Community Health Sciences Educator, Cooperative Extension of Ocean County, Rutgers New Jersey Agricultural Experiment Station, Extension Center
Toms River, New Jersey

Promoting Healthy Food & Exercise Choices in Children
Dr. Thompson will identify ways in which digital technology, such as video games, online programs, and texting, can be used in novel ways to reach children and adolescents with health-enhancing messages promoting a nutritious diet.
Debbe Thompson, Scientist/Nutritionist, Agricultural Research Service, USDA; Children’s Nutrition Center, Associate Professor of Pediatrics, Baylor College of Medicine
Houston, Texas

3:45 p.m. – 5:15 p.m.

TRACK: Food Price & Farm Income Outlooks

The Farm Income Outlook for 2013
Salon IV
This session will focus on general measures of the financial well-being of the farm economy, including farm household income. It will rely heavily on information from the Economic Research Service.
Moderator: Mitch Morehart, Senior Agricultural Economist, Farm and Rural Business Branch, Economic Research Service, USDA
Washington, DC

Income Outlook for the U.S. Farm Sector in 2013
A presentation of USDA’s most recent estimates and forecasts of U.S. farm sector value-added, net farm income, and other financial characteristics for 2013.
Kevin Patrick, Agricultural Economist, Economic Research Service, USDA
Washington, DC

Farm and Farm Household Income Trends
A discussion about various measures of farm household well-being, including on- and off-farm income, farm typology, farm size, etc.
Mary Ahearn, Economist, Economic Research Service, USDA
Washington, DC

A Global Economic Perspective on the Long-term Strength of the Farm Economy
Dr. Barr will discuss the factors driving the long-term outlook for the agricultural economy, including U.S. and global economic growth prospects, the strength of the balance sheet, credit conditions, etc.
Terry Barr, Senior Director of Industry Research, CoBank, ACB, Knowledge Exchange Division
Greenwood Village, Colorado

TRACK: Managing Risk

Managing Financial Risk in Agriculture
Salons V & VI
Although crop insurance is appropriately given significant credit for mitigating the economic effects of the 2012 drought, there are many forms of agricultural production whose cash flows are difficult to protect from yield/output risks. The session will primarily discuss two broad categories which face unique risks from extreme weather events – specialty crops and livestock production – as well as aquaculture and pasture, rangeland, and forage.
Moderator: Ken Ackerman, Olsson Frank Weeda Terman Matz P.C.
Washington, DC

Insuring Specialty Crops
In this presentation, Mr. Nelsen will discuss and clarify some of the unique aspects of insuring specialty crops generally and citrus trees in particular.
Joel Nelsen, President, California Citrus Mutual
Exeter, California

Federal Risk Mitigation Tools and Programs
Federal tools and programs that currently exist to address gaps in production risks will be discussed; principally the Farm Service Agency Noninsured Disaster Assistance Program (NAP) and various Disaster Assistance Programs, especially those that impact livestock, pastures, rangeland, and forage crops. The focus will be on specialty crops and livestock, but other challenging financial risks will be mentioned.
Juan Garcia, Administrator, Farm Service Agency, USDA
Washington, DC

Risk Mitigation Strategies Using Agricultural Credit
Mr. Everson will discuss in this presentation an agricultural bank’s perspective on the credit status of stressed customers, especially those in the livestock business, and how the bank assists its clients in reducing financial risks.
Denny Everson, President of Agriculture, Branch Administrator, First Dakota National Bank
Yankton, South Dakota

TRACK: International Trade

Prospects for Export Growth in Mexico, Indonesia, South Korea, and Turkey (MIST) Countries
Salon III
Mexico, Indonesia, South Korea, and Turkey are increasingly important markets for U.S. agricultural products. In fiscal year 2012, these four markets accounted for more than 21 percent of U.S. exports with shipments reaching $29 billion compared to $18 billion just 5 years ago. Speakers will address food consumption trends,
Thursday, February 21, 2013 (continued)

3:45 p.m. – 5:15 p.m.

the growing middle class, barriers to trade, changes in the food retail sector, and best product prospects. Presenters will also discuss key competitors in these markets and how U.S. producers can address increasing competition.

**Moderator:** Mike Dwyer, Director, Global Policy Analysis Division, Foreign Agricultural Service, USDA
Washington, DC

**Market Opportunities in Mexico**
Mitch Skalicky, U.S. Wheat Associates Regional Vice President for Mexico, Central America and the Caribbean
Mexico City, Mexico

**Challenges and Opportunities in the Growing Indonesian Market**
Dennis Voboril, Returning Counselor, Foreign Agricultural Service, USDA
Washington, DC

**South Korea**
Michael Francom, Returning Attaché, Foreign Agricultural Service, USDA
Washington, DC

**Turkey**
Kyd D. Brenner, DTB Associates, LLP
Washington, DC

**TRACK: Food Safety Modernization**

**The Food Safety Revolution: How Far Have We Come? What’s Next?**
*Salon I*
This year marks 20 years after a major E. coli O157:H7 outbreak that led to that strain being declared an adulterant, and 15 years of the Hazard Analysis and Critical Control Point (HACCP) system, one of the most significant advancements in food safety regulation at USDA. How has food safety evolved? What has been the impact of an HACCP-based system, and of the battle against O157:H7, on FSIS, on establishments, and ultimately, on consumers? What new strategies have recently been deployed, and what is the next new advancement in food safety?

**Moderator:** Elizabeth Weise, USA Today
San Francisco, California

**Industry Speaker**
Craig Wilson, Costco Wholesale, Vice President for Quality Assurance and Food Safety
Issaquah, Washington

**Consumer Speaker**
Nancy Donley, Spokesperson, STOP Foodborne Illness
Chicago, Illinois

**Science Speaker**
Rodney Moxley, University of Nebraska at Lincoln
Lincoln, Nebraska

**3:45 p.m. – 5:15 p.m.**

**TRACK: Specialty Crops & Nutrition**

**Showcasing Local Foods**
*Salon II*

**Moderator:** Sonny Ramaswamy, Director, National Institute of Food and Agriculture, USDA
Washington, DC

**Specialty Crops Block Grant Program**
Specialty crop block grants are an important resource that helps sustain the livelihood of the American farm, strengthen the economy, and decrease “food miles.” The USDA Agricultural Marketing Service program is designed to help strengthen the market for specialty crops like fruits, vegetables, tree nuts, dried fruits, horticulture and nursery crops, including floriculture.

Lela Reichart, Division Chief, Bureau of Market Development, Pennsylvania
Harrisburg, Pennsylvania

**Farm to School Program**
Bringing more locally sourced, fresh fruits and vegetables into school cafeterias is a seminal activity of farm to school efforts; procuring locally sourced, minimally processed main meal items so the entire school meal is representative of regional options and a focus of many farm to school programs. USDA supports regional procurement by schools and is engaged in helping schools increase or augment programming that builds food literacy among the Nation’s children.

Deborah J. Kane, National Director, Farm to School Program, Food and Nutrition Service, USDA
Alexandria, Virginia

**Taking Extension to the City: New Approaches for Agriculture**
Cooperative Extension is engaged in educational programs related to urban agriculture, regional and local food systems, and marketing local foods. This session will showcase evidence-based, face-to-face, and online programs that ensure safe, affordable, and accessible foods in urban and regional markets. Examples will include efforts in Detroit, Baltimore, and Denver.

Tom Coon, Extension Director, Michigan State University
East Lansing, Michigan

**Thursday February 21—6:30 p.m.**

**Salons II & IV**

**Forum Dinner Speaker**
U.S. Energy Market Outlook
Adam Sieminski, Administrator
U.S. Energy Information Administration

*Continued on next page*
8:00 a.m. – 9:30 a.m.

**TRACK: CONSERVATION**

**Drainage Water Management**

*Salons I & II*

Draining water from wet crop production fields is an important practice to increase production. Speakers will explore the use of the drainage system to provide crop moisture during dry times as well as the technology and management changes needed to effectively utilize drainage water to reduce “dry-side” production risk and increase net returns. Speakers will also discuss the conditions when drainage water management can improve production and emphasize the potential private gain that is available.

**Moderator:** Ann Mills, Deputy Under Secretary for Natural Resources and Environment, USDA

Washington, DC

Policy official Ann Mills will explain the public benefits of drainage water management.

**The Farm Perspective**

Brian Hicks, a Minnesota producer, will share his experiences in yield improvements attributable to improved drainage water management.

*Brian Hicks, Nettiewyynt Farms*

Tracy, Minnesota

**The Research Perspective**

Dr. Frankenberger will bring a research perspective to the issue of drainage water management. She was involved in a multi-state Conservation Innovation Grant on drainage water management.

*Jane R. Frankenberger, Agricultural and Biological Engineering Department, Purdue University*

West Lafayette, Indiana

**The Engineering Perspective**

Dr. Skaggs will discuss the conditions and circumstances of yield risk reduction from improved drainage water management.

*R. Wayne Skaggs, Department of Biological and Agricultural Engineering, North Carolina State University*

Raleigh, North Carolina

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**TRACK: MANAGING RISK**

**Crop Insurance: A Global Perspective**

*Salons A, B, J & K*

The discussion will outline the challenges faced by rural producers, the role of crop insurance in risk management, the changing face of the U.S. crop insurance model in other countries, the role of reinsurance, and how the United States benefits from crop insurance or similar programs in other countries.

**Moderator:** Joseph Glauber, Chief Economist, U.S. Department of Agriculture

Washington, DC

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**TRACK: INTERNATIONAL TRADE**

**Genetically Engineered Organisms: Trade & Domestic Use**

*Salons C, D & E*

The session looks to the future of policy, science, and technology for genetically engineered organisms. USDA Animal and Plant Health Inspection Service’s (APHIS) Biotechnology Regulatory Services implements regulations for certain genetically engineered organisms that may pose a risk to plant health. APHIS coordinates these responsibilities along with the other designated Federal agencies as part of the Federal Coordinated Framework for the Regulation of Biotechnology. The session will include input from the USDA Advisory Committee on Biotechnology & 21st Century Agriculture (AC21).

**Moderator:** Rebecca Blue, Deputy Under Secretary for Marketing and Regulatory Programs, USDA

Washington, DC

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8:00 a.m. – 9:30 a.m.

**Agricultural Insurance – A Growing Class of Business Globally**

John Drakeford, Aon Benfield/Agricultural Specialty

London, England

**The French Agricultural Insurance Scheme**

Yves Salmon, Groupama SA

Paris, France

Jose Angel Villalobos, Actuarial Consultant, Disaster Risk Financing and Insurance Program, The World Bank

Washington, DC

**Crop Adaptation in a Changing Climate and Biotechnology’s Role: Drought Tolerant Varieties**

How will genetically modified plants be more resistant to droughts or climate change? Industry organizations like Monsanto and Pioneer, and others, are working in coordination with APHIS to ensure that policy and permits continue to advance.

**Adrianne Massey, Managing Director, Science & Regulatory Affairs, Biotechnology Industry Organization**

Washington, DC

**Innovations in Techniques for Biotechnology**

Speaker will discuss genetically modified crops that are resistant to pests/diseases and the emerging RNAi technology.

**Robert T. Fraley, Executive Vice President and Chief Technology Officer, Monsanto**

St. Louis, Missouri

**International Trade Issues With Genetically Engineered Organisms**

Future and current trade and domestic related topics of biotech production will be discussed.

**Russell Redding, Dean of Agriculture and Environmental Science, Delaware Valley College**

Doylestown, Pennsylvania
# 8:00 a.m. – 9:30 a.m.

**TRACK: Commodity Outlooks**

### Sugar Outlook
**Salons V & VI**
**Moderator:** Steve Hines, Director of Marketing, United Sugars Corporation
Bloomington, Minnesota

**Mexico Sugar Policy**
Adriana Herrera Moreno, Graduate Student, Master of International Public Policy, Johns Hopkins University
Washington, DC

**Private Sector Analysis of the North American Free Trade Agreement (NAFTA) Sugar Market**
Ron Sterk, Associate Editor, Milling & Baking News and Food Business News,
Sosland Publishing Company
Kansas City, Missouri

**Issues with Mandatory Labeling of Genetically Engineered Foods**
Peggy G. Lemaux, Department of Plant and Microbial Biology, University of California
Berkeley, California

### Grains & Oilseeds Outlook
**Salons III & IV**
USDA staff will analyze the meteorological factors behind last summer’s historic drought, evaluate the effects of summer weather on corn and soybean yields, and provide the 2013 supply and demand outlook for wheat, corn, and soybeans.

**Moderator:** Bill Lapp, Advanced Economic Solutions
Omaha, Nebraska

**Evolution of the 2012 Drought and Its Impacts**
Brad Rippey, U.S. Agricultural Meteorologist, Office of the Chief Economist, USDA
Washington, DC

**Weather Effects on Expected Corn and Soybean Yields**
Paul Westcott, Agricultural Economist, Economic Research Service, USDA
Washington, DC

**USDA Grains & Oilseeds Outlook**
Pete Riley, Agricultural Economist, Farm Service Agency, USDA
Washington, DC

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# 10:00 a.m. – 11:30 a.m.

**TRACK: Conservation**

### Reducing Risks by Improving Soil Health
**Salons I & II**
This session will examine the indicators of soil health, to reduce chemical inputs and apply the right techniques for sustainable production and other benefits. Soil health is proving to reduce risks, especially during drought—water infiltration and holding capacity improve; chemical use decreases and yields increase. Conservationists, researchers, and farmers extol the facts and the beauty of healthy land. Soil health is defined as the capacity of the soil to function as a living ecosystem that sustains plant, animal, and human health with limited human intervention.

**Moderator:** Jane Hardesty, Indiana State Conservationist, Natural Resources Conservation Service, USDA
Indianapolis, Indiana

**What Is a Healthy Soil?**
Ray Archuleta, Agronomist, National Soil Health and Sustainability Team, Natural Resources Conservation Service, USDA
Greensboro, North Carolina

**How To Achieve a Healthy Soil**
Rick Haney, Soil Scientist, Grassland Soil and Water Research Laboratory, Agricultural Research Service, USDA
Temple, Texas

### Outlook for Transportation Risks on Our Inland Waterways
**Salons A, B, J & K**
This session will cover rail, barge, and truck issues as related to the drought and Midwest infrastructure.

**Moderator:** Bruce Blanton, Transportation Services Division, Agricultural Marketing Service, USDA
Washington, DC

**The Importance of Waterways to Agriculture**
Rick Calhoun, President, Cargill Marine and Terminal
Minneapolis, Minnesota

**Challenges for Maintaining Navigable Waterways**
Barry HolliDay, Executive Director, Dredging Contractors of America
Washington, DC

**The Challenges of Funding Our Inland Waterway Infrastructure**
Charles Stern, Specialist in Natural Resources Policy, Congressional Research Service
Washington, DC

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U.S. agricultural exports have been a bright sector of the Nation’s economy, with an estimated record value of $143.5 billion in 2012, surpassing the previous record of $137.4 billion, set in 2011. More than 1 million American jobs are reliant upon agricultural exports, including jobs in food processing, packing and shipping, transportation, and on-farm jobs and related support industries (farm machinery sales, farm services, etc). Farmer- and rancher-owned cooperatives have long been among the Nation’s leading exporters. We will hear cooperative export success stories and what these trade efforts mean for their members.

**Moderator:** Doug O’Brien, Deputy Under Secretary for Rural Development, USDA
Washington, DC

**How the U.S. Almond Industry Exported Its Way to Domination of the World Market**
Bill Morecraft, General Manager, Global Ingredients Division
Turlock, California

**How Asian Livestock Producers Are Linked With American Grain Growers**
Rick Dusek, Vice President, North American Grain Marketing, CHS Inc.
Inver Grove Heights, Minnesota

**How Accelerated Genetics Accelerated Its Business by Developing Export Markets**
Joel Groskreutz, President & CEO, Accelerated Genetics
Baraboo, Wisconsin

**TRACK: COMMODITY OUTLOOKS**

**Cotton & Fibers Outlook**
*Salons C, D & E*
**Moderator:** Kevin Latner, Executive Director, Cotton Council International
Washington, DC

**The Outlook for U.S. and World Cotton Supply and Demand**
Carol Skelly, Fibers Analyst, World Agricultural Outlook Board, USDA
Washington, DC

**The Brazil World Trade Organization (WTO) Cotton Case: A 10-Year Retrospective**
Carol Goodloe, Senior Economist, USDA, Retired
Arlington, Virginia

**Untangling China’s Cotton Policy**
Fred Gale, Senior Economist, Market and Trade Economics Division, Economic Research Service, USDA
Washington, DC

**Women in Agriculture – Speed Networking Event**
Skywalk: Everyone Welcome!

**10:00 a.m. – 11:30 a.m.**

**Risk Management and the U.S. Cotton Farmer: Strategies for Today’s Market**
Kelli Merritt, President, CropMark Direct, and Cotton Producer
Lamesa, Texas

**TRACK: COMMODITY OUTLOOKS**

**Livestock & Poultry Outlook**
*Salons II & IV*
**Moderator:** Sherry Wise, Senior Economist, Agricultural Marketing Service, USDA
Washington, DC

**USDA 2013 Livestock & Poultry Outlook**
Shayle Shagam, Livestock & Poultry Analyst and Interagency Commodity Estimates Committees (ICEC) Chair, Office of the Chief Economist, USDA
Washington, DC

**A Tragedy of the Commons – How Do We Proceed Without a Spot Market?**
Steve R. Meyer, Ph.D., President, Paragon Economics, Inc.
Adel, Iowa

**Price Discovery in Fed Cattle Markets: A Research Perspective on How Thin Is Too Thin?**
Stephen R. Koontz, Associate Professor, Colorado State University
Fort Collins, Colorado

**11:30 a.m. – 12:00 p.m.**

**Fruits & Vegetables Luncheon**
*Salons I & II*
**Moderator:** Bill Hoffman, Program and Analysis Officer, National Institute of Food and Agriculture, USDA
Washington, DC

**Local and Sustainable Produce**
Dorn Wenninger, Secretary Vice President, Produce and Floral, Wal-Mart
Washington, DC
Friday, February 22, 2013 (continued)

12:15 p.m. – 1:30 p.m.

**Sugar & Sweeteners Luncheon**  
*Salons V & VI*  
**Moderator:** Barbara Fecso, Economist, Dairy and Sweeteners Analysis Group, Farm Service Agency, USDA  
Washington, DC

**Buffering Wide Swings in the North American Free Trade Agreement (NAFTA) Sugar Market**  
Mike Gorrell, Imperial Sugar Company  
Port Wentworth, Georgia

**Cotton & Fibers Luncheon**  
*Salons C, D & E*  
**Moderator:** Davis Baker, Cotton Trader, Glencore Ltd.  
Stamford, Connecticut

**Sustainability in the U.S. and Global Cotton Supply Chains**  
Bill M. Norman, Vice President for Technical Services, National Cotton Council  
Cordova, Tennessee

**Grains & Oilseeds Luncheon**  
*Salons II & IV*  
**Moderator:** Steven Koenig, Senior Economist, Office of Regulatory Policy, Farm Credit Administration  
McLean, Virginia

**U.S. Farmland Values: Is This Cycle Different?**  
Jason R. Henderson, Vice President and Branch Executive, Omaha Branch, Federal Reserve Bank of Kansas City  
Omaha, Nebraska

**Livestock & Dairy Luncheon**  
*Salons A, B, J & K*  
Alfalfa and forage crops represent the third most valuable crop in the Nation (following only corn and soybeans). Alfalfa is integral to sustainable agricultural systems and is an economic engine in rural communities - its value for soil conservation, nitrogen fixation, energy savings, crop rotation, and wildlife habitat is unsurpassed. Alfalfa and forage crops also hold great potential to reduce our reliance on fossil fuels through the production of cellulosic ethanol.

**Moderator:** Joy Harwood, Director of Economic and Policy Staff, Farm Service Agency, USDA  
Washington, DC

**Forages Outlook: Is the Game Changing With Drought, High Feed and Commodity Prices, and Ag Policy?**  
Robin Newell, National Alfalfa and Forage Alliance Board Member, DuPont Pioneer  
Johnston, Iowa

2:00 p.m. – 3:30 p.m.

**TRACK: Conservation**

**Conserving America’s Agricultural Landscape**  
*Salons V & VI*  
Speakers will discuss lands that are too erosive to be cultivated, have greater value in lower intensity production, offer extraordinary water quality benefits, or provide essential wildlife habitat. A fundamental question is how much land fits these descriptions and should not be part of the stock of cultivated land either because of its vulnerability, its role in protecting waterways, or the habitat provided. The vegetative cover established on these lands through the Conservation Reserve Program, Wetlands Reserve Program, and other USDA programs protect these acres.

**Moderator:** Otto Doering, Professor of Agricultural Economics, Purdue University  
West Lafayette, Indiana

**Soil Erosion and Continuing Agricultural Productivity**  
Craig Cox, Environmental Working Group  
Ames, Iowa

**Buffers, Filters, and Wetlands to Expand Sustainable Cultivation**  
Mark Tomer, Soil Scientist, Agricultural Research Service, USDA  
Ames, Iowa

**The Conservation Landscape and Wildlife**  
Art Allen, U.S. Geological Survey Emeritus, Wildlife Biologist  
Fort Collins, Colorado

**TRACK: Risk Management**

**Risk Management for Small & Socially Disadvantaged Farmers**  
*Salons C, D & E*  
Small and disadvantaged farmers do not account for a major share of commercial agricultural production, but they do represent a significant share of farmers in rural America. This session provides a profile of small and disadvantaged farmers based on information from the recent Census of Agriculture in order to identify the size and current economic and demographic trends of the group. A second speaker will identify the risks this group faces, the need to manage those risks for longer term viability/sustainability, and the role of the public sector. A third speaker will discuss the resources available for small and disadvantaged farmers in coping with risk.

**Moderator:** Bill Hoffman, Program and Analysis Officer, National Institute of Food and Agriculture, USDA  
Washington, DC

**Stand Up and Be Counted: Profile of the Small & Disadvantaged Farmers**  
Hubert Hamer, Chair, National Agricultural Statistics Board, USDA  
Washington, DC

Continued on next page
Identification of the Risks Faced by, the Needs of, and the Role of Non-governmental Organizations to Small and Disadvantaged Farmers
Omar Garza, Chairman, Texas/Mexico Border Coalition
Santa Elena, Texas

Resources Available to the Small and Disadvantaged Farmer
Albert E. Essel, Associate Dean – Cooperative Extension, College of Agriculture & Related Sciences, Delaware State University
Dover, Delaware

TRACK: Energizing Rural Economies

Energizing Rural Economies
Salon IV
Expanding capital available for rural investment delivers the tools and technologies to meet energy, telecommunications, and business needs to help our economy grow. Rural Development programs and services can help rural consumers increase productivity, efficiency, and innovation, which can expand domestic and foreign markets, reduce costs, and help diversify and strengthen rural economies.

Moderator: John Padalino Administrator, Rural Utilities Service, Rural Development, USDA
Washington, DC

How New Energy Investment Benefits Rural Communities
Nivin Elgohary, Assistant Administrator, Rural Utilities Service, Electric Program, Rural Development, USDA
Washington, DC

Blueprint for a Successful Energy Efficiency Program in Rural Communities
Tom Van Paris, Vice President, Member Services & Communications, Hoosier Energy
Bloomington, Indiana

Looking Ahead: What Can Rural Areas Expect From a New Rule to Finance Energy Efficiency?
Martin Lowery, Chief Operating Officer, National Rural Electric Cooperative Association
Arlington, Virginia

TRACK: Weather Outlook

Weather Outlook for 2013
Salons A, B, J & K

2012 Weather Review
The drought of 2012 was a multi-billion-dollar U.S. agricultural disaster. The drought was on par with the 1988 drought which caused $77.6 billion in mostly agricultural losses. Historically, the U.S. drought of 2012 attained similar coverage to the U.S. drought of the 1950s. According to the U.S. Drought Monitor (USDM), nearly two-thirds (65.45 percent) of the continental U.S. was in drought on September 25—the date of peak coverage. U.S. drought coverage reached 54.77 percent on September 25. Both numbers represented records during the 13-year history of the USDM. Using the Palmer Drought Index (PDI), the drought of 2012 was the Nation’s worst—in terms of moderate to extreme drought coverage—since 1954. Although the U.S. drought dominated global agricultural weather headlines, there were a number of 2012 international crop developments that will be discussed.
Brad Rippey and Eric Luebehusen, Agricultural Meteorologists, Office of the Chief Economist, USDA
Washington, DC

VegScape: A NASS Web Service-based U.S. Crop Condition Monitoring System
Rick Mueller, Head, Spatial Analysis Research Section, National Agricultural Statistics Service, USDA
Washington, DC

Outlook for the 2013 Growing Season
Anthony Artusa, Climate Prediction Center, National Center for Weather and Climate Prediction
College Park, Maryland

Preparing for the 2013 Growing Season
Tom Van Paris, Vice President, Member Services & Communications, Hoosier Energy
Bloomington, Indiana

Looking Ahead: What Can Rural Areas Expect From a New Rule to Finance Energy Efficiency?
Martin Lowery, Chief Operating Officer, National Rural Electric Cooperative Association
Arlington, Virginia

TRACK: Commodity Outlooks

Dairy Outlook
Moderator: Randy Schnepf, Specialist in Agricultural Policy, Resources, Science, and Industry Division, Congressional Research Service
Washington, DC

USDA 2013 Outlook for Dairy
Jerry Cessna, Senior Agricultural Economist-Dairy Programs, Agricultural Marketing Service, USDA
Washington, DC

Prospects for Dairy Policy in 2013
Scott Brown, Agricultural Economist, Department of Agricultural and Applied Economics, University of Missouri
Columbia, Missouri

International Dairy Outlook 2020: A Fonterra View
Fiona Hutchinson, Vice President, Government Relations and Trade Strategy
Fonterra Co-operative Group Limited
Washington, DC

2012 Census of Agriculture
Congratulations to USDA’s Agricultural Outlook Forum
Student Diversity Program Winners

Juniors and seniors chosen based on their winning essays, “Agriculture as a Career”:
Miguel Aceves, University of Arizona, Yuma
Crystal Adams, University of Maryland Eastern Shore
Samantha Anderson; Murray State University
Robin Avison, Middle Tennessee State University
Travis Chase, University of Idaho
Devinn Esberry, University of Maryland Eastern Shore
Christina Flores, California State University, Fresno
Tyler Harran, University of Wyoming
Candice Harvey, Fort Valley State University
Rose Jean-Mary, Miami Dade College
Keith Lewis, Prairie View A&M University
Nathan Lim, University of Maryland, College Park
Tiana Mason, Virginia State University
Tiara McCray, North Carolina A&T State University
Rebecca Naasz, South Dakota State University
Napoleon O’Quinn, Alcorn State University
Francisco Rodriguez, California State University, Stanislaus

Gabrielle Rovegno, University of Maryland College Park
Sergio Toro, San Diego State University
Ricardo Zapater Ramos, University of Puerto Rico, Mayaguez

Graduate students chosen based on winning essays on “The Greatest Challenge Facing Agriculture Over the Next 5 Years”:
Andrea Basche, Iowa State University
Jeremy Bennett, Oklahoma State University
Michael Cagle, Mississippi State University
Allen Denkins, Tennessee State University
Augustina Odame, Utah State University
Aaron Pomerantz, University of Florida
Kevin Redwine, Texas Tech University
Zachary Schultzhaus, Texas A&M University
Megan Waldrop, Washington State University
Venus Welch-White, Tuskegee University

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February 20-21, 2014, USDA’s Next Agricultural Outlook Forum

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Salon V
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Grand Ballroom
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Salon L
Salon M
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Salon U
Salon V
Salon VI

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*Pre-registered Attendees Badge pick-up: 7:00 a.m.-10:00 a.m. Feb. 21, 2013

TO CAPITOL TOWER
SKYWALK

Mt. VERNON
Speaker's Room

7:00 a.m.-10:00 a.m. Feb. 21, 2013