



United States Department of Agriculture

# Agricultural Outlook Forum



## The Changing Face of Agriculture



**February 20-21, 2014**

**Crystal Gateway Marriott Hotel ■ Arlington, Virginia**

[www.usda.gov/oce/forum](http://www.usda.gov/oce/forum)

# The 90th Year of USDA's Agricultural Outlook Forum



Gerald A. Bange  
Program Chair

In this 90th year of USDA's Outlook Forum, we thank the outstanding speakers, including corporate presidents and leaders, whose participation is greatly appreciated! We give special thanks to the U.S. Farmers & Ranchers Alliance® for hosting and live-streaming the Food Dialogues® session focused on nutrition. Over the next 2 days, you will have the opportunity to participate in sessions addressing:

- The Future of Agriculture
- Perspectives on U.S. Trade
- Commodity Situation and Outlooks
- A Roadmap for Women in Agriculture
- Nutrition: Who's Shaping America's Eating Habits?
- Agriculture Supporting Our Veterans
- Preliminary Data on the 2012 Census of Agriculture
- The Latest in Nanotechnology

Whether you are here for the traditional situation and outlooks and to hear science speakers, to explore the "Changing Face of Agriculture," or to celebrate the 100th anniversary of the Cooperative Extension Service, we hope that everyone exchanges valuable knowledge and makes enduring connections.

## USDA Agricultural Outlook Forum Student Diversity Program

In 2007, CHS Inc. and Farm Credit, with the help of our partner, the University of Maryland Eastern Shore, launched the first USDA Agricultural Outlook Forum Student Diversity Program. Since then, the program has expanded to 30 students, including 10 graduate students. The response and enthusiasm have been profound. The students are selected based on their essays. Here is a quote from a 2014 undergraduate student winner:

“Now more than ever, we need people to choose agriculture as a career. Just think of how many challenges facing our world might be solved through the cooperation agriculture encourages among individuals, communities, and nations. Food shortages, climate change, resource management, energy production, and other obstacles can all be addressed through the various agricultural sciences. I hope as I pursue my own career in agriculture that I can one day enjoy the real wealth and happiness that Thomas Jefferson and millions of others have come to understand.”

SKYLER CHRISTENSEN, UTAH STATE UNIVERSITY

For coverage of the Ag Outlook Forum, follow @USDA and #AgOutlook

# The Changing Face of Agriculture

## Plenary Speakers



### Plenary Welcome

Deputy Secretary  
Krysta Harden



### Keynote Address

Agriculture Secretary  
Tom Vilsack



### Agricultural Outlook

Chief Economist  
Joseph Glauber

## Future of Agriculture

### Panel #1: Building Markets Here & Abroad



Paul Schickler, President,  
DuPont Pioneer



Rajiv Shah, Administrator,  
U.S. Agency for  
International Development



Cathy Burns, President,  
Produce Marketing  
Association



Kellee James, Founder,  
CEO, Mercaris

### Panel #2: Young Farmers – Unlimited Opportunities



Michael O’Gorman,  
Executive Director, Farmer  
Veteran Coalition



Greg Wegis, National  
Outstanding Young Farmer  
Award



Joanna Carraway, Top  
Producer Horizon Award



Emily Oakley, Interim  
Director, National Young  
Farmers Coalition



### The U.S. Trade Agenda: Supporting Economic Growth and Jobs at Home

U.S. Trade Representative  
Michael Froman  
Dinner Speaker

# You Are Invited To Attend:

## February 20

<b>Morning Coffee</b>	<b>Grand Ballroom Foyer</b> <i>10:00 a.m.</i>
<b>Networking Luncheon</b>	<b>Salons A, B, C, D, E &amp; Skywalk</b> <i>12:30 p.m.</i>
<b>Reception</b>	<b>Exhibit Hall Salons F, G &amp; H</b> <i>5:30 p.m.</i>
<b>Forum Dinner</b>	<b>Salons III &amp; IV</b> <i>6:30 p.m.</i>

## February 21

<b>Luncheons</b> <ul style="list-style-type: none"><li>• Livestock &amp; Poultry</li><li>• Sugar &amp; Sweeteners</li><li>• Cotton &amp; Fibers</li><li>• Grains &amp; Oilseeds</li></ul>	<b>12:15 p.m. – 1:30 p.m.</b> Salons V & VI Salons I & II Salons C, D & E Salons III & IV
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**Plenary Webcast:** Online after 6 p.m., Feb. 20

**Commodity Outlooks:** Online at 7 a.m., Feb. 21

**Speaker Presentations:** Online after 6 p.m., Feb. 21

**Speakers' Biographies:** [www.usda.gov/oce/forum](http://www.usda.gov/oce/forum)

## The Changing Face of Agriculture





# 2014 Agricultural Outlook Forum

Thursday, February 20

<b>Registration</b> ( <i>Wednesday Evening Onsite Registration 5-8 p.m.</i> )				
8:15 a.m. <b>Welcome</b> Plenary Webcast after 6 p.m. at <a href="http://www.usda.gov/oce">www.usda.gov/oce</a>				
8:20 a.m. <b>Outlook for U.S. Agriculture in 2014</b> - Chief Economist Joseph Glauber				
8:40 a.m. <b>Panel #1: Future of Agriculture</b> - Moderated by Agriculture Secretary Tom Vilsack				
10:00 a.m. <b>30-Minute Coffee Break</b>				
10:30 a.m. <b>Panel #2: Future of Agriculture</b> - Moderated by Agriculture Secretary Tom Vilsack				
12:00 p.m. <b>Secretary Vilsack Addresses Audience</b>				
12:15 p.m. <b>Plenary Ends</b>				
<b>Networking Luncheon 12:30</b> (60 minutes) <i>Salons A, B, C, D, E &amp; Skywalk</i>				
<b>Concurrent Sessions 1:30 p.m. - 3:00 p.m.</b>				
<b>Food Price &amp; Farm Income Outlooks</b>	<b>International Trade</b>	<b>The Next Generation</b>	<b>Conservation</b>	<b>Science</b>
<b>Food Price Outlook for 2014</b> <i>Salon IV</i>	<b>The China Puzzle</b> <i>Salons V &amp; VI</i>	<b>The New Agricultural Census</b> <i>Salon III</i>	<b>Economics of Conservation</b> <i>Salon II</i>	<b>Protecting U.S. Animal &amp; Plant Health From Invasive Pests</b> <i>Salon I</i>
<b>Concurrent Sessions 3:30 p.m. - 5:00 p.m.</b>				
<b>Special 3:30 Session: A Roadmap for Women in Agriculture</b> <i>Salons V &amp; VI</i>				
<b>Farm Income Outlook for 2014</b> <i>Salon IV</i>	<b>Expanding Consumer-Oriented Exports</b> <i>Salon III</i>	<b>@USDA: Tweet, Meet &amp; Succeed</b> <i>Rosslyn Room</i>	<b>Sustainability - Are We Applying Our Critical Inputs Wisely?</b> <i>Salon II</i>	<b>Nanotechnology in the Future of Agriculture &amp; Forestry</b> <i>Salon I</i>
<b>Reception - Exhibit Area - 5:30 p.m.</b>				
<b>Forum Dinner Speaker - Ambassador Michael Froman - Salons III-IV 6:30 p.m.</b>				

Friday, February 21

7:00 a.m. <b>Registration</b>	
7:30 a.m. <b>Exhibit Hall Opens</b> <i>Salons F &amp; G</i>	
<b>Concurrent Sessions 8:00 a.m. - 9:30 a.m.</b>	
<b>Rural Development</b>	<b>Agroforestry, Forestry &amp; Citrus</b>
<b>Know Your Farmer, Know Your Food</b> <i>Salons C, D &amp; E</i>	<b>Strengthening Rural Communities</b> <i>Rosslyn Room</i>
<b>Agroforestry: Enriching Lives With Trees</b> <i>Salons I &amp; II</i>	<b>Outbreak Containment &amp; Emergency Response</b> <i>Salons V &amp; VI</i>
<b>Increasing Resilience to Climate Variability</b> <i>Salons J &amp; K</i>	<b>Grains &amp; Oilseeds Outlook</b> <i>Salons III &amp; IV</i>
<b>Concurrent Sessions 10:00 a.m. - 11:30 a.m.</b>	
<b>Agriculture Supporting Our Veterans</b> <i>Salons J &amp; K</i>	<b>Protecting Our Forests</b> <i>Rosslyn Room</i>
<b>Food Dialogues (Live &amp; Livestreaming)</b> <i>Salons A &amp; B</i>	<b>Livestock &amp; Poultry Outlook</b> <i>Salons III &amp; IV</i>
<b>Cotton Outlook</b> <i>Salons C, D &amp; E</i>	<b>Sugar Outlook</b> <i>Salons I &amp; II</i>
<b>12:15 p.m. - 1:30 p.m.</b>	
<b>Speaker Luncheons</b>	<b>Livestock &amp; Poultry</b> <i>Salons V &amp; VI</i>
<b>Sugar &amp; Sweeteners</b> <i>Salons I &amp; II</i>	<b>Cotton &amp; Fibers</b> <i>Salons C, D &amp; E</i>
<b>Grains &amp; Oilseeds</b> <i>Salons III &amp; IV</i>	
<b>30-min Break</b>	
<b>Concurrent Sessions 2:00 p.m. - 3:30 p.m.</b>	
<b>U.S. Farm Land: Uses, Values &amp; Policies</b> <i>Salons I &amp; II</i>	<b>Launching Cooperative Extension's Next Century</b> <i>Rosslyn Room</i>
<b>Citrus Greening &amp; the Citrus Industry</b> <i>Salons V &amp; VI</i>	<b>Local Food Businesses at the Rural/Urban Interface</b> <i>Salons C, D &amp; E</i>
<b>Weather &amp; Agriculture Outlook 2014</b> <i>Salons J &amp; K</i>	<b>Dairy Outlook</b> <i>Salon IV</i>
<b>Adjourn</b>	

[www.usda.gov/oce/forum](http://www.usda.gov/oce/forum)

# The Changing Face of Agriculture

Thursday, February 20, 2014

## BREAKOUT SESSIONS

1:30 – 3:00 p.m.

### TRACK: FOOD PRICE & FARM INCOME OUTLOOKS

#### Food Price Outlook

##### 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:** Michael McConnell, Senior Consultant, Informa Economics  
McLean, Virginia

#### Outlook for U.S. Food Prices and Inflation in 2014

A presentation of the latest ERS 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.

**Richard Volpe, Economist, Economic Research Service, USDA**  
Washington, DC

#### What Do Commodity Prices Suggest About Food Price Trends?

Commodity prices have been highly volatile in recent years and have led to concerns about food price inflation. The prices of many commodities are now trending lower as supplies are increasing. How do changing commodity prices affect the long-term outlook for food prices?

**Ron Trostle, Economist, Economic Research Service, USDA**  
Washington, DC

#### The Outlook for Global Commodity and Food Prices and Implications for Food Security

The prices of most basic food grains and other staple crops are trending lower, but what are the implications for food security in the developing world? Will lower prices and greater food supplies lead to a noticeable improvement in the lives of the world's poorest people?

**Keith Wiebe, Senior Research Fellow, International Food Policy Research Institute**  
Washington, DC

### TRACK: INTERNATIONAL TRADE

#### The China Puzzle

##### Salons V & VI

In 2012, China surpassed the United States to become the second largest global agricultural importer after the European Union. China has also emerged as the top U.S. agricultural export market, passing Mexico and Canada. A growing middle class and greater demand for high-value food, changing Chinese agricultural production, and trade policies are expected to dramatically impact future global trade. Speakers will address China's political environment, its impact on the reform process, its regulatory environment, and how food safety affects its market access.

**Moderator:** Phil Karsting, Administrator, Foreign Agricultural Service, USDA  
Washington, DC

#### China's Agricultural Support Policies: Help or Hindrance

**Fred Gale, Senior Economist, Economic Research Service, USDA**  
Washington, DC

#### The Technology Imperative

**Dennis Erpelding, Director, Government Affairs, Elanco**  
Greenfield, Indiana

#### The Impact of China's Food Safety Policies on Trade

**Scott Sindelar, Minister Counselor for Agricultural Affairs, Foreign Agricultural Service, USDA**  
Beijing, China

### TRACK: THE NEXT GENERATION

#### The New Agricultural Census

##### Salon III

USDA's first release of preliminary data from the 2012 Census of Agriculture will occur at the Forum; panelists will cover the latest information on the number of farms, land in farms, value of sales and government payments, and demographics.



**Moderator:** Cynthia Clark, Administrator, National Agricultural Statistics Service, USDA  
Washington, DC

#### 2012 Census of Agriculture Highlights

**Hubert Hamer, Chair, Agricultural Statistics Board, USDA**  
Washington, DC

#### Changing Faces: The Demographics of U.S. Agriculture

**Virginia Harris, Statistician, National Agricultural Statistics Service, USDA**  
Washington, DC

#### The Financial Foundation of U.S. Agriculture

**Troy Joshua, Chief, Environmental, Economics and Demographics Branch, National Agricultural Statistics Service, USDA**  
Washington, DC

#### Implications for Future Farm Programs and Policy

**Bob Young, Chief Economist & Deputy Executive Director, Public Policy, American Farm Bureau Federation**  
Washington, DC

1:30 – 3:00 p.m.

**TRACK: CONSERVATION**

**Economics of Conservation**

**Salon II**

This session will explore one of the most important factors influencing the adoption and sustained use of conservation systems and their adjustment over time. Namely, does the practice have a positive economic return to the producer or the public? Tools for economic evaluation will be a part of each presentation.

**Moderator:** Jason Weller, Chief, Natural Resources Conservation Service, USDA  
Washington, DC

**Practice Adoption Economics**

Speaker is always testing new opportunities—like growing two cash crops in the same field at the same time—and asking will my return be worth the expense? He will outline the decision process, identify the key drivers, and discuss the tools he uses along with the financial circumstances in making economic evaluations.

**Mark Jennings, Agricultural Producer**  
Washburn, North Dakota

**Ecosystem Service Economics**

Speaker will explore the economics of ecosystem services from a regional landscape perspective. She will provide insight on the benefits of managing private decisions to improve ecosystem services or the resource and discuss the tools used in conservation evaluations.

**Catherine Phillips, Vice President of Sustainable Forests and Products, Weyerhaeuser Corporation**  
Federal Way, Washington

**Are the Benefits to Society Worth the Costs of Conservation?**

Speaker will explore the economics of conservation and Federal involvement. What is society buying with technical and financial assistance? Why is society purchasing conservation? What tools are needed to do a “better” job of quantifying the costs and benefits of conservation?

**Susan Capalbo, Department Head and Professor, Applied Economics, Oregon State University**  
Corvallis Oregon

**TRACK: SCIENCE**

**Protecting U.S. Animal & Plant Health From Invasive Pests**

**Salon I**

Session speakers will discuss how USDA is protecting U.S. agricultural health from invasive pests in times of diverging stakeholder interests, and constraining resources. The session will focus on USDA's collaborative work with States and industries, and in international trade.

**Moderator:** Kevin Shea, Administrator, Animal and Plant Health Inspection Service (APHIS), USDA  
Washington, DC

1:30 – 3:00 p.m.

**State Perspective**

**Karen Ross, Secretary of the California Department of Food and Agriculture**  
Sacramento, California

California is the largest producer of agricultural products and the top exporting State. APHIS works with the California Department of Food and Agriculture (CDFA) on multiple fronts to combat the introduction and spread of pests and diseases. Secretary Ross will speak about CDFA's collaborative work with USDA to protect California's agriculture.

**Industry Perspective**

The National Poultry Improvement Plan is an example of a well-organized campaign by private industry in partnership with Federal and State agencies to improve animal disease management for the purpose of enhancing product marketability.

**G. Donald Ritter, Director of Health Services, Mountaire Farms, Inc.**  
Millsboro, Delaware

**Agricultural Trade Perspective**

Speaker will discuss USDA's roles in safeguarding U.S. agriculture and promoting exports, while balancing the interests of consumer advocacy groups and agricultural industry. Examples include: 2012 Bovine spongiform encephalopathy (BSE) discovery in California and the 2013 genetically modified organism (GMO) wheat discovery in Oregon, the equivalency trade agreements for organic products, Sanitary and Phytosanitary (SPS)-related trade negotiations with Korea, Colombia, and Panama, and Trans-Pacific Partnership and Transatlantic Trade and Investment Partnership negotiations.

**Suzanne Heinen, Senior Counselor to the Under Secretary for Farm and Foreign Agricultural Service, USDA**  
Washington, DC

**BREAKOUT SESSIONS**

3:30 – 5:00 p.m.

**TRACK: FOOD PRICE & FARM INCOME OUTLOOKS**

**The Farm Income Outlook for 2014**

**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 generated by the Economic Research Service.

**Moderator:** Todd Davis, Senior Economist, Farm Bureau  
Washington, DC

**Income Outlook for the U.S. Farm Sector in 2014**

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 2014.

**Kevin Patrick, Economist, Economic Research Service, USDA**  
Washington, DC

Continued on next page

3:30 – 5:00 p.m.

### Farm and Farm Household Income Trends

A discussion about various measures of farm household well-being, including trends in on- and off-farm income, farm typology, farm size, and operator demographics.

*Jeremy Weber, Economist, Economic Research Service, USDA  
Washington, DC*

### Is the Current Farm Prosperity Sustainable?

A perspective on the intermediate and long-term outlook for farm income and the factors that could either support or undermine the profitability of the sector. Issues discussed will include global economic growth patterns, interest rates, and land values.

*Brent Gloy, Center for Commercial Agriculture, Purdue University  
West Lafayette, Indiana*

## TRACK: INTERNATIONAL TRADE

### Expanding Consumer-Oriented Exports

#### Salon III

Record exports of U.S. agricultural products in 2013 were the result of strong consumer-oriented shipments, which are growing in importance. Much of the growth is due to developing country demand and the spread globally of organized retailing. Speakers will address innovative ideas for marketing consumer-oriented products internationally, the rapid growth of organized retailing, and the increase in non-tariff trade barriers.

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

### New Marketing Channels in China

*Gary Clubb, Senior Business Development Manager, Tmall  
(Presentation)*

*Edith Huang, Senior Director, Lifestyle Products Department, Tmall  
(Q & A Respondent)  
Shanghai, China*

### Organized Retail Growth in Developing Nations and the Impact on Food Imports

*Sean Darragh, Executive Vice President, Global Strategies, &  
Carmen Stacy, Director, Global Issues & Multilateral Affairs, Grocery  
Manufacturers Association  
Washington, DC*

### Innovative Marketing in Competitive Markets

*Susan Weller, International Marketing Manager for the Frozen Food  
Program, United States Potato Board  
Denver, Colorado*

## TRACK: THE NEXT GENERATION

### @USDA: Tweet, Meet & Succeed

#### Rosslyn Room

The next generation at USDA looks very different from what it did 100 years ago. In this session, we will learn what it will take to “get and stay” in the game!

3:30 – 5:00 p.m.

**Moderator:** *Max Finberg, Senior Advisor to the Assistant Secretary for  
Administration, USDA  
Washington, DC*

### Success Through Internships

USDA Agricultural Outlook Forum Student Diversity Program students will describe what attracted them to agriculture and their success with internships. A brief overview of USDA's internship programs will also be described.

*Candice Harvey, Economist, Grain Inspection, Packers and  
Stockyards Administration, USDA  
Washington, DC*

### Using Social Networks To Promote Agriculture

Social networking is a powerful way to reach tomorrow's agriculture workforce and consumers. Speaker will address how to use social media to our advantage.

*Alison Kosakowski, Marketing and Communications Director, Vermont  
Agency of Agriculture  
Richmond, Vermont*

Follow this session using: Hash tag: #USDA: TMS

## TRACK: CONSERVATION

### Sustainability – Are We Applying Our Critical Inputs Wisely?

#### Salon II

Experts believe there will be significant shortages of water and phosphorous, and that farmers overuse nitrogen. The panelists will consider questions like: Are the input markets failing to send the right signals for optimal resource allocation and sustainability? Do we have the tools to know the right balance of efficient use of resources and maximum sustainable production?

**Moderator:** *Otto C. Doering, III, Professor, Department of Agricultural  
Economics, Purdue University  
West Lafayette, Indiana*

### Water

*Lester Brown, President, Earth Policy Institute, author of Peak Water  
Washington, DC*

### Nitrogen

*Cliff Snyder, Nitrogen Program Director, International Plant Nutrition  
Institute  
Conway, Arkansas*

### Phosphorus

*Steven J. Van Kauwenbergh, International Fertilizer Development  
Center, Research and Development Division  
Muscle Shoals, Alabama*

3:30 – 5:00 p.m.

**TRACK: SCIENCE**

**Nanotechnology in the Future of Agriculture & Forestry**

*Salon I*

**Moderator:** *Hongda Chen, National Institute of Food and Agriculture, USDA  
Washington, DC*

**Nanotechnology: Thinking Big About Small Things**

(Nanotechnology is the science of working with atoms and molecules to build devices that are extremely small.) An overview of nanotechnology covering what it is, recent trends in the field, and the coordinated Federal program known as the National Nanotechnology Initiative.

*Lloyd J. Whitman, Deputy Director, Center for Nanoscale Science and Technology,  
National Institute of Standards and Technology (In person at the Forum!)*  
*Gaithersburg, Maryland*

**Taped Presentations: Nanotech Applications in Agriculture**

A series of brief, taped presentations by people actively working on agricultural nanotech applications.

*Bosoon Park, Agricultural Engineer Quality and Safety Assessment  
Research Unit, Agricultural Research Service, USDA  
Athens, Georgia*

*DNA Aptamers for Agricultural Applications  
Maria DeRosa, Associate Professor, Bioinorganic Chemistry,  
Carleton University  
Ottawa, Canada*

*Nanotechnology Applications in Animal Breeding  
Peter Sutovsky, Associate Professor, Reproductive Physiology,  
Division of Animal Sciences, University of Missouri  
Columbia, Missouri*

**Nanomaterials From Forest Products**

*Sean Ireland, New Technologies and Market Ventures, Verso Paper  
Corp.,  
University of Maine (In person at the Forum!)*  
*Orono, Maine*

**What Lies in the Future for Agricultural Nanotechnology?**

Where does the future lie for nanotechnology in agriculture? What is possible, what are the barriers? What are the challenges?  
*Norman Scott, Professor Emeritus, Department of Biological &  
Environmental Engineering,  
Cornell University; Chair, Board on Agriculture and Natural Resources,  
National Academies of Science, National Research Council (In person  
at the Forum!)*  
*Tucson, Arizona*

3:30 – 5:00 p.m.

**SPECIAL SESSION:**

**A Roadmap for Women in Agriculture**

*Salons V & VI*

The session will detail the variety of career choices the panelists have taken as well as how they have shaped their future in the face of opportunities and challenges. The panelists will discuss their views on the importance of impacting agricultural policy, removing barriers for women, and collaborations.

**Moderator:** *Krysta Harden, Deputy Secretary of Agriculture,  
USDA  
Washington, DC*

**Panel Speakers:**

*Autumn Veazey, Director, Government Relations, Land of Lakes  
Washington, DC*

*Debbie Hamrick, Director of Specialty Crops, North Carolina  
Farm Bureau Federation  
Raleigh, North Carolina*

*Kate Danner, Corn and Soybean Farmer  
Roseville, Illinois*



**The U.S. Trade Agenda:  
Supporting Economic Growth and  
Jobs at Home**

**Michael Froman**  
**U.S. Trade Representative**  
**Dinner Speaker**  
**6:30 p.m.**

Continued on next page

8:00 – 9:30 a.m.

**TRACK: RURAL DEVELOPMENT**

**Know Your Farmer, Know Your Food: The Past, Present & Future**

**Salons C, D & E**

The Know Your Farmer, Know Your Food Initiative (KYF2) coordinates USDA's work on local and regional food systems. How has KYF2 upheld the original vision and how will it continue to do so in the future?

**Moderator:** *Joani Walsh, Deputy Under Secretary for Marketing and Regulatory Programs, USDA  
Washington, DC*

**Overview of KYF2 - History & Accomplishments**

This speaker will review the goals and objectives of the KYF2 initiative, how it works, and what has been accomplished to date.

*Elanor Starmer, National Coordinator and Advisor, Local and Regional Food Systems, Office of the Secretary, USDA  
Washington, DC*

**Leveraging USDA Programs for Economic Development Through Food Systems**

This speaker will discuss how local food systems can use KYF2 and other USDA programs to improve the supply, distribution, and demand for local foods.

*Emily Oakley, Interim Director, National Young Farmers Coalition  
Oaks, Oklahoma*

**Importance of KYF2 for Rural Economies: A Practical Example**

This speaker will discuss how KYF2 and Federal-State-local partnerships work together to promote local food production and distribution and highlight the initiative's work to grow the local food economy in Appalachia.

*Guy Land, Chief of Staff, Appalachian Regional Commission  
Washington, DC*

**Strengthening Rural Communities**

**Rosslyn Room**

Through new partnerships with private and public entities, USDA Rural Development is working to create opportunities and deliver resources to strengthen rural economies. This session will show how technology is used to help farmers improve crop yield, conserve water, and use monitoring to leverage markets, as well as provide access to health care and social services.

**Moderator:** *Scott D. Woods, Communications Program Specialist, Broadband Technology Opportunities Program, National Telecommunications & Information Administration, U.S. Department of Commerce  
Washington, DC*

**The Role of Precision Farming in Building Stronger Rural Economies**

Speaker will discuss how precision farming can benefit both farmers and rural communities through higher crop yields and environmental monitoring in rural communities.

*Joaquin Silva, Co-Founder and CEO, TerraVu, a Precision Agriculture Information Service  
Carlsbad, California*

8:00 – 9:30 a.m.

**Expanding Markets & Creating Job Opportunities**

Speaker will look at delivery of quality, specialized health care that can create healthier rural economies, with a focus on care for veterans returning home from overseas.

*Gina Capra, Director, Office of Rural Health, Veterans Health Administration  
Washington, DC*

**Improving Access to Education, Healthcare & New Businesses**

Speaker will address the role of government and other stakeholders in how expanding access to healthcare can create opportunities and deliver resources that unlock the door to vibrant rural economies.

*Leila Samy, Rural Health IT Coordinator, Office of the National Coordinator,  
U.S. Department of Health and Human Services  
Washington, DC*

**TRACK: AGROFORESTRY, FORESTS & CITRUS**

**Agroforestry: Enriching Lives With Trees**

**Salons I & II**

Agroforestry makes it possible to meet multiple objectives on the same parcel of land while providing a number of social and environmental benefits. The practice of growing crops **and** trees or livestock is catching among farmers, ranchers, forest owners, and even urban residents who seek greater productivity, profitability, and social and environmental outcomes. This session explores agroforestry applications and the latest agroforestry trends.

**Moderator:** *Wayne Honeycutt, Deputy Chief for Science and Technology, Natural Resources Conservation Service, and Chair of the Agroforestry Executive Steering Committee, USDA  
Washington, DC*

**Silvopasture: Trees, Livestock, and Forages: Working Together for Profits & More!**

Learn how landowners are successfully applying silvopasture with cattle and pine trees, and the future direction of silvopasture in the Eastern United States.

*John Fike, Associate Professor, Crop and Soil Environmental Sciences, Virginia Tech  
Blacksburg, Virginia*

**Hybrid Hazelnuts: A Promising Future Crop for Food, Feed & Bioenergy**

Learn about the remarkable capabilities of hybrid hazelnuts and how expanding hazelnut production can advance sustainable energy, wildlife habitat conservation, and human health and well-being.

*Scott Josiah, Nebraska State Forester, Nebraska Forest Service  
Lincoln, Nebraska*

**Urban Food Forests: A Growing Trend**

Learn about the 'urban food forest' movement through an inspiring story of how Baltimore and other U.S. cities are growing orchards that provide local food for residents, conserve open space, and connect the urban population to nature.

*Nina Beth Cardin, Founder, Baltimore Orchard Project  
Baltimore, Maryland*

8:00 – 9:30 a.m.

**TRACK: NUTRITION & FOOD SAFETY/LOCAL FOODS**

**Outbreak Containment & Emergency Response**

**Salons V & VI**

When a foodborne illness has broken out, what procedures are in place with public health partners, law enforcement, etc.? What role can technology play – such as using social media to alert consumers? What are the limits and challenges of a recall?

**Moderator:** *David Goldman, Assistant Administrator, Office of Public Health Science, Food Safety and Inspection Service, USDA Washington, DC*

**Speakers:**

*David Goldman, Assistant Administrator, Office of Public Health Science, Food Safety and Inspection Service, USDA Washington, DC*

*Matthew Wise, U.S. Public Health Service, Outbreak Response Team Lead, Outbreak Response and Prevention Branch, Division of Foodborne, Waterborne, and Environmental Diseases, Centers for Disease Control and Prevention Atlanta, Georgia*

*Alicia Cronquist, Foodborne and Enteric Disease Epidemiologist, Disease Control and Environmental Epidemiology Division, Colorado Department of Public Health and Environment Denver, Colorado*

**TRACK: MARKETS & WEATHER**

**Increasing Resilience To Climate Variability**

**Salons J & K**

This session will examine the resiliency of agricultural productions systems and how that can stabilize production given annual weather variability and projected climatic change and long- term trends.

**Moderator:** *Bruce Stein, Director of Climate Change Adaptation, National Wildlife Federation Reston, Virginia*

**Conservation Practices To Increase Resiliency**

Speaker will address the relationship of soil carbon, organic matter, water retention and holding capacity, and how they increase resiliency to extreme weather events.

*Jerry Hatfield, Supervisory Plant Physiologist, Agricultural Research Service, USDA Ames, Iowa*

**Modeling at the Farm Level**

This topic explores the relationship between conservation practices and managing carbon using a predictive tool to help farmers manage carbon and measure sequestration.

*Adam Chambers, Physical Scientist, Air Quality and Atmospheric Change Team, Natural Resources Conservation Service, USDA Portland, Oregon*

**Regional Climate Hubs**

USDA has created a system of regional research, education, and information centers. Speaker will discuss how this new system will be helpful at the farm level to improve resilience to changing climate. *William Hohenstein, Director, Office of Global Climate Change, USDA Washington, DC*

8:00 – 9:30 a.m.

**TRACK: MARKETS**

**Grains & Oilseeds Outlook**

**Salons III & IV**

**Moderator:** *Gopinath Munisamy, Director, Market and Trade Economics Division, Economic Research Service, USDA Washington, DC*

**USDA Grains & Oilseeds Outlook**

*Mark Ash, Economist, Economic Research Service, USDA Washington, DC*

**Grain Stocks Estimates: Can Anything Explain the Market Surprises of Recent Years?**

*Scott H. Irwin, Laurence J. Norton Chair of Agricultural Marketing, University of Illinois at Urbana-Champaign, Dept. of Agricultural & Consumer Economics Urbana, Illinois*

10:00 – 11:30 a.m.

**TRACK: RURAL DEVELOPMENT**

**Agriculture Supporting Our Veterans**

**Salons J & K**

USDA has several initiatives that serve veterans and other beginning farmers and ranchers. Discussions will describe how one of these programs has helped returning veterans interested in the food and agriculture sector.

**Moderator:** *Alexis Taylor, Chief of Staff, Office for the Under Secretary for Farm and Foreign Agricultural Services, USDA Washington, DC*

**Farming Opportunities**

In 2006, when Colin Archipley, a Marine veteran, returned from a third tour in Iraq, he and his wife, Karen, created the Veterans Sustainable Agriculture Training program. *They work with active duty and returning veterans and families and created an agribusiness focused on veterans.*

*Sergeant Colin and Karen Archipley, Founders of Veterans Sustainable Agriculture Training San Diego, California*

**Funding Opportunities**

A veteran with a goal of farming needed some assistance, and with help from the local USDA Farm Service Agency office, she received a beginning farmer micro-loan.

*Vonita Murray, Poultry Farmer Elverta, California*

**Entrepreneurial Opportunities**

Speaker will discuss how his organization helps returning veterans convert their unique skills to farming and agribusiness opportunities. *Michael O’Gorman, Executive Director, Farmer Veteran Coalition Davis, California*

Continued on next page

10:00 – 11:30 a.m.

### USDA Employees: Supporting Provincial & Reconstruction Efforts

Margaret Rhodes, who served as a USDA employee in Afghanistan, will discuss the role agriculture played in Afghanistan.

*Margaret Rhodes, Chief of Staff to the Deputy Under Secretary for Natural Resources and Environment, USDA  
Riverdale, Maryland*

### TRACK: AGROFORESTRY, FORESTRY & CITRUS

#### Protecting Our Forests

##### Rosslyn Room

Non-native invasive pests continue to threaten our forests, agriculture, and way of life. There are many pathways for these organisms, exacerbated by global trade and travel. This session will provide an overview of the pests, their pathways, phytosanitary measures, and describe how cooperation efforts have been applied.

**Moderator:** *Butch Blazer, Deputy Under Secretary for Natural Resources and Environment, USDA  
Washington, DC*

#### Pests and Their Pathways: Phytosanitary Measures Are So Important!

This big picture presentation will highlight key forest pests, their pathways, and how non-government and industrial partnerships help government develop and implement effective and efficient phytosanitary measures.

*Bill Toomey, Director, Forest Health Programs, The Nature Conservancy  
Arlington, Virginia*

#### Horticultural Industry Partnerships Help Protect Agriculture and Natural Resources – Challenges and Success Stories

Speaker focuses how phytosanitary measures for horticultural plants are key to protecting U.S. agricultural and forestry interests and the implementation of International Standards for Phytosanitary Measures (ISPM)-36.

*Craig Regelbrugge, Senior Vice President, Industry Advocacy and Research, AmericanHort  
Washington, DC*

#### Forest Industry Partnership Helps Prevent the Introduction of Wood Borers – Success Story: Implementing International Standards for Phytosanitary Measures-15

Speaker will discuss industry's role in ensuring that measures developed are practical and can be implemented with minimum impact on trade. He will also look to the future, envisioning participation in developing an international standard for wood products.

*John McDaniel, President, American Lumber Standard Committee, Incorporated  
Germantown, Maryland*

10:00 – 11:30 a.m.

### TRACK: NUTRITION & FOOD SAFETY/LOCAL FOODS

#### FOOD DIALOGUES®

*Salons A & B – Attendance is on a first-come basis. Due to live-streaming of the session, late arrivals cannot be accommodated.*

#### Nutrition: Who's Shaping America's Eating Habits?

The U.S. Farmers & Ranchers Alliance® (USFRA®) is hosting an in-person and live-streamed Food Dialogues® event at USDA's Agricultural Outlook Forum. Join a group of farmers and ranchers, nutritionists and food pundits for a discussion on food production, nutrition, and making healthy food choices.

Organic, conventional, locally grown and natural – these are all terms consumers hear every day, but do they really understand their meaning? Are consumers making informed purchasing decisions or are they simply making food decisions based on what they hear in popular culture and media?

**Moderator:** *Carolyn O'Neil, MS, RD, the author of "Slim Down South Cookbook" and a nutrition advisor to BestFoodFacts.org, will moderate a panel that includes:*

*Jim Call – Farmer, Call Farms, Madison, Minnesota*

*Dr. Roger Clemens – Chief Scientific Officer, Horn and Adjunct Professor of Pharmacology and Pharmaceutical Sciences, USC School of Pharmacy, Los Angeles, California*

*Dennis Derryck – President and Founder, Corbin Hill Farms, New York, New York*

*Dr. Craig Rowles – Partner and General Manager, Elite Pork Partnership, LLP, Carroll, Iowa*

*Barbara Ruhs, MS, RD, LDN – Supermarket Health & Nutrition Expert, Phoenix, Arizona*

### TRACK: MARKETS & WEATHER

#### Livestock & Poultry Outlook

##### Salons III & IV

**Moderator:** *James Hodges, Interim President and CEO, American Meat Institute  
Washington, DC*

#### USDA Livestock & Poultry Outlook for 2014

*Shayle Shagam, Livestock & Poultry Analyst and Interagency Commodity Estimates Committee Chair, Office of the Chief Economist, USDA  
Washington, DC*

#### Size Matters! The Economics of Carcass Weights

*John S. Nalivka, President and Owner, Sterling Marketing, Inc.  
Vale, Oregon*

#### Impact of Porcine Epidemic Diarrhea Virus (PEDV) on the U.S. Pork Industry

*Liz Wagstrom, Chief Veterinarian, National Pork Producers Council  
Washington, DC*

10:00 – 11:30 a.m.

**TRACK: MARKETS**

**Cotton Outlook**

**Salons C, D & E**

**Moderator:** Jim Langley, Senior Analyst, Congressional Budget Office  
Washington, DC

**USDA's Cotton Outlook for 2014/15**

James Johnson, Agricultural Economist, Foreign Agricultural Service,  
USDA  
Washington, DC

**USDA's Perspective on Policy Changes in China**

Stephen MacDonald, Senior Economist, Economic Research Service,  
USDA  
Washington, DC

**Prospects for U.S. Cotton Production in a Shifting Price Environment**

John R. C. Robinson, Professor and Extension Economist, Texas A&M University,  
AgriLife Extension Service, Department of Agricultural Economics  
College Station, Texas

**Risks and Rewards of Sourcing Cotton for Today's Retail Market**

A. Mark Neuman, Global Trade Advisor, L Brands & MGF Sourcing  
Washington, DC

**Sugar Outlook**

**Salons I & II**

**Moderator:** Paul Trupo, Branch Chief, Sugar & Dairy Imports, Foreign Agricultural Service, USDA  
Washington, DC

**Government Support Policies and the World Sugar Market**

Don Phillips, Trade Adviser, American Sugar Alliance  
St. Leonard, Maryland

**From Deficit to Surplus: Managing the Shift in the North American Free Trade Agreement (NAFTA) Sugar Balance**

John Copley, Senior Analyst, ED&F Man  
New Orleans, Louisiana

**Implications of an Integrated U.S.-Mexican Sugar Sector**

Steve Haley and Getachew Nigatu, Economic Research Service, USDA; and Lynn Kennedy, Louisiana State University, contributed to the research and writing of this presentation.  
Steven Zahniser, Agricultural Economist, Economic Research Service, USDA  
Washington, DC

12:15 – 1:30 p.m.

**SPEAKER LUNCHEONS**

**Livestock & Poultry Luncheon**

**Salons V & VI**

**Moderator:** Anne Alonzo, Administrator, Agricultural Marketing Service, USDA  
Washington, DC

12:15 – 1:30 p.m.

**2014: The Opportunities and Challenges Facing Small Meat Processors**

Chris Young, Outreach Specialist, American Association of Meat Processors  
Elizabethtown, Pennsylvania



**Grains & Oilseeds Luncheon**

**Salons III & IV**

**Moderator:** Robert Johansson, Deputy Chief Economist, USDA  
Washington, DC

**Insights Into Current Policies Affecting Grains & Oilseeds**

Sara Wyant, President, Agri-Pulse Communications, Inc  
Washington, DC and Camdenton, Missouri



**Sugar & Sweeteners Luncheon**

**Salons I & II**

**Moderator:** Barbara Fecso, Sugar Program Manager, Dairy and Sweeteners Analysis Group, Farm Service Agency, USDA  
Washington, DC

**Mexican Sugar Outlook and Government Actions To Address Oversupply**

Carlos Rello Lara, Director General, Fondo de Empresas Expropiadas del Sector Azucarero  
Mexico City, Mexico



**Cotton & Fibers Luncheon**

**Salons C, D & E**

**Moderator:** Herman Kohlmeyer, Jr., Managing Director, Michael J. Nugent and Company, Inc.  
New Orleans, Louisiana

**Thirty Years of Guessing: Why Cotton Forecasts Have Not Improved**

Terry Townsend, Executive Director (Retired), International Cotton Advisory Committee  
Silver Spring, Maryland



2:00 – 3:30 p.m.

**TRACK: RURAL DEVELOPMENT**

**U.S. Farm Land: Uses, Values & Policies**

**Salons I & II**

This session will examine the changes in agricultural land use, rates of conversion to production, where they are located, as well as the values of land itself. Other topics may include: the possibility of a land asset bubble, trends in rents, and Farm Bill policy.

**Moderator:** Damona Doye, Professor of Agricultural Economics, Oklahoma State University  
Stillwater, Oklahoma

**U.S. Land Outlook**

Jason Henderson, Associate Dean, Director of Purdue Extension, and Professor, Purdue University, College of Agriculture Administration, Agricultural Economics  
West Lafayette, Indiana

Continued on next page

2:00 – 3:30 p.m.

### Land Use

Speaker will explore implications of the supply of agricultural land from land conversion, changes in land rents, and Farm Bill policies.  
*Lori Lynch, Professor of Agricultural and Resource Economics, University of Maryland College Park, Maryland*

### Farmland Markets and Business Finances

*Jennifer Ifft, Agricultural Economist, Economic Research Service, USDA Washington, DC*

### Launching Cooperative Extension's Next Century

#### Rosslyn Room

On May 8, 1914, Cooperative Extension was launched with the signing of the Smith-Lever Act. Learn how Extension has been translating agricultural research for practical application for 100 years.

**Moderator:** *Krysta Harden, Deputy Secretary of Agriculture, USDA Washington, DC*

### Celebrating the Legacy of Cooperative Extension

For 100 years, the Smith-Lever Act has stimulated innovative research and vital educational programs for youth and adults through progressive information delivery systems that improved lives and shaped a Nation. Speaker will give a legacy overview of Cooperative Extension.

*Douglas L. Steele, Director, Texas A&M AgriLife Extension Service College Station, Texas*

### Cooperative Extension Today

Cooperative Extension "extends knowledge, changes lives." This will be a fast-paced summary of program priorities, and impacts showing how current educational strategies help people, farm and ranch businesses and communities solve problems, develop skills and build a better future.

*Frances Gould, Professor & Director, Agricultural Center Communications, Louisiana State University Agriculture Center Baton Rouge, Louisiana*

### Innovations for the Next Century

As Cooperative Extension launches its next 100 years, some keys to success will involve partnerships, entrepreneurship, engagement, high-tech/high-touch approaches, and urban/rural integration. Learn how Extension is changing to meet the demands of a new demographic, economic, and social era.

*Jimmy Henning, Director, Associate Dean/Director, Kentucky Cooperative Extension Service, University of Kentucky Lexington, Kentucky*

### TRACK: AGROFORESTRY, FORESTS & CITRUS

### Citrus Greening & the Future of the Citrus Industry

#### Salons V & VI

**Moderator:** *Chavonda Jacobs-Young, Associate Administrator for National Programs, Agricultural Research Service, USDA Beltsville, Maryland*

### Industry Perspective: The Challenge of Huanglongbing (Citrus Greening) Disease

What is Citrus Greening? What is its present and potential impact?

2:00 – 3:30 p.m.

Why is control a challenge? Why are partnerships so critical to this disease?

*Marylou Polek, Vice President, Science and Technology, Citrus Research Board Visalia, California*

### Research: Challenges, Successes & the Future

What is the present state of research? What do we know? What do we need to know?

*Ed Stover, Subtropical Insects and Horticultural Research, Agricultural Research Service, USDA Ft. Pierce, Florida*

### Quarantine and Control

Early detection, monitoring, diagnostics, and the outlook for Citrus Greening.

*Prakash Hebbar, Citrus Health Response Program, Pest Management, Animal and Plant Health Inspection Service, USDA Riverdale, Maryland*

### TRACK: NUTRITION & FOOD SAFETY/LOCAL FOODS

### Local Food Businesses at the Rural/Urban Interface

#### Salons C, D & E

Urban markets represent a great opportunity for rural producers located near population centers. Branding and marketing local or regionally produced food is one way that rural producers can reach urban consumers. Food hubs, cooperatives, and alternative distribution channels are building new connections.

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

### From Wholesale to Consumer-Direct & Everything in Between

Speaker will discuss the evolution of Eastern Market in Detroit, a 100-year-old market that has evolved into a wholesale market, farmers market, and food hub and works with producers from Michigan and neighboring States. Eastern Market has utilized several USDA programs.

*Dan Carmondy, Executive Director, Eastern Market Corporation Detroit, Michigan*

### Food as Leverage: Building Sustainable Markets & Improving Quality of Life

Hunger Mountain Cooperative has grown from a small storefront with a handful of employees to a bustling centerpiece in Montpelier, employing over 160 people and working with more than 400 Vermont producers.

*Kari Bradley, Hunger Mountain Co-op Montpelier, Vermont*

### The Tech Fix: Bridging Rural Producers, Distributors & Urban Schools

FarmLogix uses technology to address the challenges facing distributors and school districts interested in purchasing from local producers. FarmLogix secured a contract with the Chicago City School District and is connecting rural food producers to new urban markets.

*Linda Mallers, CEO, FarmLogix, LLC. Chicago, Illinois*

2:00 – 3:30 p.m.

**TRACK: MARKETS & WEATHER**

**Weather & Agriculture 2014**

**Salons J & K**

**Moderator:** *Mike Halpert, Acting Director, Center for Weather and Climate Prediction, National Oceanic and Atmospheric Administration College Park, Maryland*

**A Behind-the-Scenes Look at the Drought Monitor: History, Tools, and Methods**

*Eric Luebehusen, Agricultural Meteorologist, Office of the Chief Economist, USDA Washington, DC*

**The U.S. Drought of 2012-13 Lingers and Shifts Westward**

*Brad Rippey, Agricultural Meteorologist, Office of the Chief Economist, USDA Washington, DC*

**Weather Outlook for 2014**

*Anthony Artusa, Meteorologist, Climate Prediction Center, National Oceanic and Atmospheric Administration Camp Springs, Maryland*

2:00 – 3:30 p.m.

**TRACK: MARKETS**

**Dairy Outlook**

**Salon IV**

**Moderator:** *Peter Vitaliano, Vice President, Economic Policy & Market Research, National Milk Producers Federation Arlington, Virginia*

**Dairy Outlook**

*Uthra Raghunathan, Agricultural Economist, Dairy Programs, Agricultural Marketing Service, USDA Washington, DC*

**Development and Growth of the “GlobalDairyTrade” Platform**

*Margarita Sapozhnikov, Associate Principal, Charles River Associates, Auctions & Competitive Bidding Practice Boston, Massachusetts*

**Challenges and Opportunities for the Southwestern Dairy Producer**

*Dave Bellows, Director of Risk Management, AgriVision Farm Management, LLC. Hartley, Texas*

**Congratulations to USDA’s Agricultural Outlook Forum Student Diversity Program Winners**

**Undergraduate Students Chosen Based on Winning Essays, “Agriculture as a Career”:**

- Tyler Blocker, Tuskegee University
- Brytann Busick, Oregon State University
- Kenneth Callier, Delaware State University
- Skylar Christensen, Utah State University
- Ralph Evans, University of Arizona, Yuma
- Meredith Frisius, California Polytechnic State University
- Y’Tarius Goldsberry, Alcorn State University
- Chelsea Grainger, University of Maryland Eastern Shore
- Bryan Gutierrez, Miami Dade College
- Simone Hairston, North Carolina A&T State University
- Daijonna Hall, Prairie View A&M University
- Randy Juste, Florida International University
- Jimeca Lawrence, Fort Valley State University
- Pinzhang Li, University of Maryland, College Park
- Ruben Sanchez, California State University, Bakersfield
- Kaitlyn Sanson, Oklahoma State University
- Harry Schonberger, Virginia Polytechnic Institute & State University
- Dustin Smith, University of Minnesota, Crookston
- Kerry Snyder, University of Delaware
- Meghan Vaill, Cornell University

**Graduate Students Chosen Based on Winning Essays, “The Greatest Challenge Facing Agriculture Over the Next 5 Years”:**

- Sherry Blackmon, Mississippi State University
- Moonyoung Choi, Virginia Polytechnic Institute & State University
- Luis Colon-Otero, Universidad Metropolitana
- Adebola (Kemi) Daramola, University of Maryland Eastern Shore
- Jessica Gilbert, University of Florida
- Christian Gonzales, Florida International University
- Hector Hernandez, New Mexico State University
- Megan Holmes, Texas State University – San Marcos
- Jose Luis Perez, Texas A&M University, College Station
- Keiko Tuttle, Washington State University

**Thank You Sponsors and Partners**

- CHS Inc. and Farm Credit
- University of Maryland Eastern Shore
- USDA’s Economic Research Service,
- Agricultural Research Service, and
- Natural Resources Conservation Service

**PLEASE COMPLETE:** **FORUM EVALUATION** - <http://www.cvent.com/d/w4q1xz>  
either online or via next week’s e-mail.

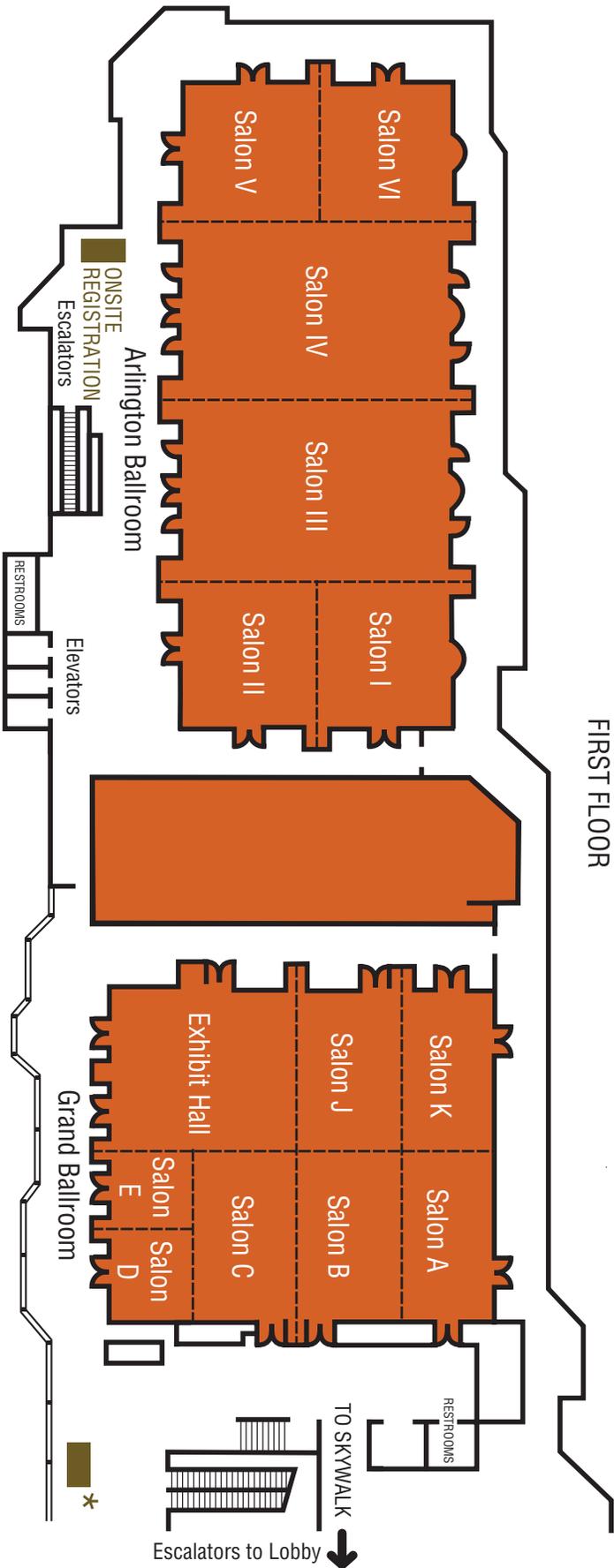
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**February 19-20, 2015,  
USDA’s Next Agricultural Outlook Forum**

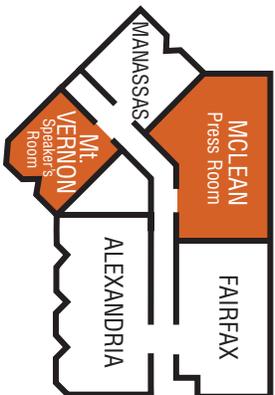
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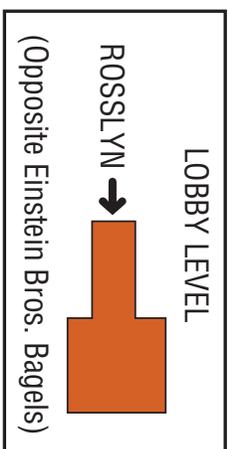


SECOND FLOOR



ARLINGTON TOWER

\*Pre-registered Attendees  
7:00 a.m.-10:00 a.m. Feb. 20, 2014  
Badge pick-up.



Eads Street