The future of agriculture has both challenges and prospects as the Nation faces a new horizon. In 2016, American farmers pressed forward during a geographical mix of drought and flooding. In that midst, there has been significant growth in sustainable agriculture, the emergence of new markets for U.S. agricultural products and off-farm ag opportunities. The most recent Census of Agriculture (2012) shows there are 3.2 million farm operators across the country. The Market Value of Agricultural Products report shows products sold in accordance with the 2012 Census of Ag was $394,644,481,000 with the average per farm totaling $187,097. These numbers reflect the importance and impact of Rural America to the Nation’s overall economy and the country’s international agricultural relationships. The Agricultural Outlook Forum is a platform facilitating conversation on key issues and topics within the agricultural community, including academic leaders, producers, processors, policy makers, government officials, and both foreign and domestic non-government organizations. USDA continues to seek out fresh and pioneering ways to expand opportunity and provide support for America’s farming families, which is at the core of the 93rd Agricultural Outlook Forum.

“A New Horizon: The Future of Agriculture”

This year, USDA’s annual Agricultural Outlook Forum will be opened by Acting Deputy Secretary Mike Young, who will kick off a plenary program with speakers who have and will continue to play important roles in the ag sector. To lead off, USDA Chief Economist Robert Johansson will present “The 2017 Economic Outlook for Agriculture.” Our distinguished speaker is the Nation’s longest serving governor, Terry Branstad, Governor of Iowa, who will share his views on the state of agriculture. Delivering the keynote address is House Agriculture Committee Chairman Mike Conaway. The morning will also feature a plenary panel of industry leaders including Rajiv Singh from Rabobank, Beth Ford from Land O’Lakes, Inc., and Luke Chandler from John Deere, each of whom will relate their sector’s experience and expectations for agriculture. Sara Wyant will then lead the panel in a forward-looking discussion addressing the challenges and opportunities facing the sector. Zippy Duvall, President of the American Farm Bureau Federation, will join us as the dinner speaker to share with us the producer’s view of agriculture today.

In addition, we have 30 concurrent track sessions supporting the Forum theme, including a session on India as a market and as a competitor, sessions on marketing-driven changes to ag production, as well as sessions looking at the financial health of the sector. I’m very excited about this year’s program and thank you all for joining us as we discuss issues of importance to U.S. agriculture.

USDA Agricultural Outlook Forum, Student Diversity Program

This year marks the 10th anniversary for the USDA Agricultural Outlook Forum, Student Diversity Program. The program launched in 2007 and targets 30 students to include 20 undergraduates and 10 graduates from Land-Grant Colleges and Universities, Hispanic-Serving Institutions, and American Association of State Colleges of Agriculture and Renewable Resources Institutions throughout the country. The students chosen to attend the Forum have earned this opportunity through a stiff competitive essay process. Thanks goes out to the University of Maryland Eastern Shore, CHS Foundation, Farm Credit, as well as USDA’s Agricultural Research Service, Economic Research Service, National Agricultural Statistics Service, Natural Resources Conservation Service, Office of Advocacy, and Outreach and Office of the Chief Economist, that have supported the Forum’s Student Diversity Program since its inception.

Former program winners have said the Forum “opened their eyes” to a larger world and better prepared them for more advanced achievements in agriculture. USDA proudly acknowledges the sizeable number of Diversity Program participants who are full-time employees of the Department.

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USDA’s 93rd Annual Agricultural Outlook Forum

A New Horizon

Looking Toward “The Future of Agriculture”

Welcome
Michael Young
Acting Deputy Secretary

Distinguished Speaker
Terry Branstad
Governor of Iowa

Keynote Speaker
Rep. Mike Conaway
U.S. House Ag Committee Chairman

2017 Agricultural & Foreign Trade Outlook
Robert Johansson
USDA Chief Economist

Plenary Panel with Agriculture Industry Leaders

Moderator
Sara Wyant
Agri-Pulse Communications, Inc. President

Panelist
Rajiv Singh
Rabobank North America Wholesale CEO

Panelist
Beth Ford
Land O’Lakes, Inc. Group Executive VP & COO

Panelist
Luke Chandler
John Deere Deputy Chief Economist

Dinner Speaker

Speaker
Zippy Duvall
American Farm Bureau Federation President

USDA is an equal opportunity provider, employer, and lender.

Follow coverage of Ag Outlook Forum - @USDA, @USDA.AOF, #AgOutlook, and flickr photos at https://flic.kr/s/aHskN8iEsA
You Are Invited To Attend:

Thursday, February 23

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>9:45 a.m.</td>
<td>Morning Coffee Grand Ballroom Foyer</td>
</tr>
<tr>
<td>12:30 p.m.</td>
<td>Networking Luncheon Salons A, B, C, D, E &amp; Sky View</td>
</tr>
<tr>
<td>3:15 p.m.</td>
<td>Women’s Networking Event Sky View</td>
</tr>
<tr>
<td>5:30 p.m.</td>
<td>Reception Exhibit Hall Salons F, G &amp; H</td>
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<tr>
<td>6:30 p.m.</td>
<td>Forum Dinner Salons III &amp; IV</td>
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Friday, February 24

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<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>12:15 – 1:30 p.m.</td>
<td>Luncheons Salons J &amp; K, C, D &amp; E, A &amp; B, Salons III &amp; IV</td>
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</tbody>
</table>

On the USDA 2017 Agricultural Outlook Forum Web Site: www.usda.gov/oce/forum

- **Speaker Biographies and Attendee List**: Posted online
- **Plenary Session Webcast**: Posted after 6 p.m. Thursday, February 23
- **Commodity Outlooks**: Posted at 7 a.m. Friday, February 24
- **Speaker Presentations**: Posted after 6 p.m. Friday, February 24

See, share, and download photos at https://flic.kr/s/aHskN8iEsA

www.usda.gov/oce/forum
A New Horizon

Thursday, February 23

7:00 a.m. Registration  (Wednesday Evening Early Onsite Registration 5-7 p.m.)
8:00 a.m. Welcome
8:05 a.m. 2017 Agricultural & Foreign Trade Outlook
8:45 a.m. Distinguished Address
9:35 a.m. Keynote Address
10:20 a.m. Coffee Break
10:40 a.m. Industry Plenary and Question & Answer
12:30 p.m. Networking Luncheon

Concurrent Sessions

1:45 p.m. International Markets & Trade  Food Price Outlook & Pest & Disease  Farm Income Outlook & Finance Outlook  Environmental Quality  Agriculture for the Future

<table>
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<tr>
<th>Time</th>
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<tr>
<td>1:45 p.m.</td>
<td>India: Challenges &amp; Opportunities  salon IV  Food Price Outlook  salon III  Farm Income Outlook  salon V &amp; VI  Soil Health Management System  salon I &amp; II  The Outlook for Organic Agriculture  salon J &amp; K</td>
</tr>
</tbody>
</table>

3:15 p.m. — Women’s Networking Event — Sky View —

3:45 p.m. South America Trade  salon IV  Pest & Disease Pressures  salon III  Ag Financial Stress Test  salon J & K  New Model For Conservation: RCPP  salon I & II  The Role of Data in Food Safety  salon V & VI

5:30 p.m. Cash Bar Reception
6:30 p.m. Forum Bar Reception

Friday, February 24

7:00 a.m. Registration
7:30 a.m. Exhibit Hall Opens

Concurrent Sessions

8:00 a.m. Farm Policy & Funding  Water & Climate  Commodity Outlooks  Commodity Outlooks  Marketing & Consumer-Driven Practices

<table>
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<tr>
<td>8:00 a.m.</td>
<td>Farm Policy Changes  salon A &amp; B  Making Decisions in a Changing Climate  salon V &amp; VI  Grains &amp; Oilseeds Outlook  salon III &amp; IV  Sugar Outlook  salon J &amp; K  Growing Demand For Cage-Free Eggs  salon I &amp; II</td>
</tr>
<tr>
<td>9:30 a.m.</td>
<td>Break</td>
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<tr>
<td>10:00 a.m.</td>
<td>Farm Safety Net  salon A &amp; B  Building Resilience in a Water Scarce World  salon V &amp; VI  Livestock &amp; Poultry Outlook  salon III &amp; IV  Cotton Outlook  salon J &amp; K  Marketing-Driven Changes In Ag Production  salon I &amp; II</td>
</tr>
</tbody>
</table>

Visit Exhibit Hall

Luncheons


1:30 p.m. Break

Concurrent Sessions

2:00 p.m. SPS Trade Agreement Enforcement  GMO Labeling  Commodity Outlook  Bio-Based Opportunities  Nutrition

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<tr>
<td>2:00 p.m.</td>
<td>SPS Measures &amp; U.S. Ag Exports  salon J &amp; K  GMO Disclosure: Transparency for the Market  salon A &amp; B  Dairy Outlook  salon III  The BIO-Economy: Fuels, Jobs and Power  salon V &amp; VI  Nutritional Security Through Ag Production  salon I &amp; II</td>
</tr>
<tr>
<td>3:30 p.m.</td>
<td>Adjourn</td>
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A New Horizon: The Future of Agriculture

Thursday, February 23, 2017

1:45pm – 3:15pm

TRACK: INTERNATIONAL MARKETS AND TRADE

INDIA: Challenges and Opportunities

Salon IV

The outlook for India’s agricultural policy and markets as well as the experiences of U.S. investors and exporters.

Moderator: Richard M. Ros sow, Senior Fellow and Wadh wani Chair, U.S.-India Policy Studies, Center for Strategic and International Studies, Washington, DC

India’s Agricultural Transition: Is Demand Outpacing Policy?
Recent policy developments and the growing pressures on policymakers to reform agricultural and trade policies.

G. Chandrashekhar, Economic Advisor and Director, Indian Merchant’s Chamber (IMC), Mumbai, India

Future Trade and Investment Opportunities in the Indian Market
Recent and medium-term performance for agricultural trade and agribusiness in the Indian market.

Alejandro Munoz, Vice President, Global Commercial Business, Dupont Pioneer, Johnston, IA

Exporting to India
This speaker will focus on his industry’s experience in exporting to India, with lessons learned for developing a successful strategy for the Indian market.

Todd Fryhover, President, Washington Apple Commission, Wenatchee, WA

TRACK: FOOD PRICE OUTLOOK AND PEST AND DISEASE

Food Price Outlook

Salon III

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.


2017 Food Price Outlook
The latest Economic Research Service outlook for retail food prices along with a look at recent historical trends in food expenditure patterns.
Annemarie Kuhns, Economist, USDA, Economic Research Service, Washington, DC

Retail Revolution: How Technology and the New Consumer Are Transforming the Food Retail Landscape
How consumers are using technology to shape their decisions and retail strategies for using these same tools to stay competitive in a world of new choices.

Andrew Harig, Senior Director, Sustainability, Tax and Trade, Food Marketing Institute, Arlington, VA

Market Concentration and Markups in the Food Retail Industry: Evidence From Military Commissary Data
How markups among large food retailers vary with the size and number of firms competing within markets.
Richard Volpe, Professor, California Polytechnic University, San Luis Obispo, CA

TRACK: FARM INCOME OUTLOOK & FINANCE OUTLOOK

Farm Income Outlook

Salon V & VI

The Farm Income Outlook will present a comprehensive look at farm and farm household income forecasts including associated risks.

Moderator: Jackson Takach, Economist, Farmer Mac, Washington, DC

Farm Sector Income Forecast
This presentation focuses on the Farm Sector Income forecast.

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

Farm Household Income Forecast
This presentation focuses on the Farm Household Income forecast.

Daniel Prager, Economist, USDA, Economic Research Service, Washington, DC

“Past as Prologue: Lessons From the 1980s Farm Financial Crisis”
This presentation places the current financial situation and outlook data into historical context.

Allen Featherstone, Professor, Department of Agricultural Economics, Kansas State University, Manhattan, KS

Thank you attendees for making the Forum possible with your commitment and participation in this annual event.
**TRACK: ENVIRONMENTAL QUALITY**

**Soil Health Management Systems: Challenges and Opportunities**

*Salons I & II*

A description, evaluation, and envisioning of the state of the science around soil health in agricultural production systems, and how federally and privately funded initiatives work together to address the future needs for research, education and extension and program delivery.

**Moderator:** Sheldon Jones, Chief Operating Officer, Soil Health Institute, Morrisville, NC

**Soil Health Initiatives of the USDA Natural Resources Conservation Service (NRCS)**

Soil health activities of the NRCS, plans, program delivery, impacts, and outcomes in relation to NRCS soil health initiatives and Farm Bill programs.

Bianca Moebius-Clune, Director, Soil Health Division, USDA, Natural Resources Conservation Service, Washington, DC

**Soil Science Research, Education, and Extension at the Land-Grant Universities**

Land-Grant University activities, impacts and outcomes of soil health research, education, extension and outreach activities.

Charles Rice, Professor and Chair of the National Academy of Sciences Board on Ag and Natural Resources, Kansas State University, Manhattan, KS

**Producer Perspectives on Soil Health and Decisionmaking**

Producers' perspectives on the importance of soil health and the benefits to their farm.

Russ Hedrick, Farmer and Owner, JRH Grain Farms, Hickory, NC

**TRACK: AGRICULTURE FOR THE FUTURE**

**The Outlook for Organic Agriculture**

*Salons J & K*

U.S. organic food sales continue expanding at double-digit growth rates, and this trend shows no sign of slowing. Gallup's most recent consumer survey found that 45 percent of Americans now actively try to include organic foods in their diets. Speakers examine prospects for organic producers, consumer demand, and new initiatives to encourage organic transition.

**Moderator:** Brise Tencer, Executive Director, Organic Farming Research Foundation, Santa Cruz, CA

**The Outlook for U.S. Organic Agriculture**

The U.S. Department of Agriculture’s Economic Research Service presents a market outlook for the organic sector similar to those presented for conventional commodity groups.

Gustavo Ferreira, Economist, USDA, Economic Research Service, Washington, DC

**Overview: Public and Private Efforts To Incentivize Organic Transition**

A number of public and private initiatives have emerged to support U.S. crop and livestock producers during their transition to organic production.

Nate Lewis, Farm Policy Director, Organic Trade Association, Washington, DC

**Industry View: Strategic Partnerships To Expand the Supply of Organic Ingredients**

General Mills plans to double its organic acreage for sourcing ingredients by 2019 and is building partnerships with Organic Valley and others to encourage transition.

Katrina Heinze, Organic Ambassador, General Mills, Minneapolis, MN

**3:45pm – 5:15pm**

**TRACK: INTERNATIONAL MARKETS AND TRADE**

**Brazil and Argentina Economic Conditions: Ag Growth and Trade Impact**

*Salon IV*

Brazil and Argentina are South America’s two largest markets and important agricultural competitors for the United States. How will changing economic conditions (i.e., recession, currency devaluation) and tax policy reforms impact their agricultural sectors’ ability to continue the pace of their projected growth and slow or accelerate export expansion and implications for U.S. agriculture?

**Moderator:** Constanza Valdes, Economist, USDA, Economic Research Service, Washington, DC

**Brazil’s Economic Recession: Impact on the Competitiveness of Agriculture**

Brazil's economic recession is being further challenged by adverse developments in China, with the potential to affect world trade, international prices, and competitiveness.

Geraldo Sant’Ana de Camargo Barros, Director, Center for Advanced Studies on Applied Economics, University of Sao Paulo, Brazil

Continued on next page
Argentina’s Agribusiness Potential
New economic reforms are encouraging Argentinean farmers and agribusiness to boost production and trade to regain the country’s status as an important global agricultural player.
Patricia Bergero, Deputy Director for Information and Economic Research at the Bolsa de Comercio de Rosario, Buenos Aires, Argentina

Brazil and Argentina’s Recession, Reforms, and Renewal: Opportunities and Challenges for U.S. Agriculture
Potential impact of Brazil’s economic recession and Argentina’s reforms on U.S. agriculture production, trade, and world market prices.
C. Parr Rosson, Professor and Department Head, Department of Agricultural Economics, Texas A&M University, College Station, TX

TRACK: Food Price Outlook and Pest and Disease
Significant Pest and Disease Issues Confronting U.S. Agriculture
Salon III
Recent experience with HPAI, Citrus greening, and Equine piroplasmosis demonstrate the significance of pest and disease threats to American agriculture, and highlight the need for evaluation of the response to such emergencies. Animal and plant emergencies increase costs due to crop damage, increased mortality and decreased yields, as well as increased expenditures for control and management.

Moderator: Michael Gregoire, Associate Administrator, USDA, Animal and Plant Health Inspection Service, Washington, DC

The Case of Highly Pathogenic Avian Influenza (HPAI)
In 2015, the U.S. experienced its worst-ever outbreak of HPAI, leading to the destruction of about 50 million birds at a cost of nearly $1 billion to the Government.
Jack Shere, Deputy Administrator, Veterinary Services, USDA, Animal and Plant Health Inspection, Washington, DC

The Case of Equine Piroplasmosis
Equine piroplasmosis can, indeed, be spread by species of ticks endemic to this country. Vigilance in identifying and combating this disease was crucial in preventing a crisis.
Don Knowles, Research Leader, USDA, Agricultural Research Service and Washington State University, Pullman, WA

The Case of Citrus Greening
Citrus growers in Florida, Texas, and California have contended with many diseases and pests over the years. None has posed the threat they now face with citrus greening.
Ned Hancock, President and Owner, Hancock Citrus, Incorporated, Sebring, FL

TRACK: Farm Income Outlook and Finance Outlook
Ag Finance Stress Test
Salons J & K
The continued slide in farm sector income is raising concerns that farms are experiencing higher levels of financial stress after several years of higher incomes. The session will examine direct evidence, including data on farm loan delinquencies and Chapter 12 bankruptcies, in order to put current levels of farm financial stress in historical perspective.

Moderator: Nathan Kauffman, Assistant Vice President, Federal Reserve Bank of Kansas City, Omaha, NE

Assessing Financial Stress in the AgStar Portfolio
Methods for assessing and addressing financial stress in the AgStar portfolio, including the current outlook for farm sectors served by member banks.
Joseph Deufel, Executive Vice President and Chief Credit Officer, AgStar Financial Services, Mankato, MN

Assessing Financial Stress in the FSA Loan Portfolio
A review of USDA’s Farm Service Agency loan activity, portfolio trends, and current conditions and the degree to which they reflect changes in credit availability for farmers.
Speaker: Jim Radintz, Deputy Administrator for Farm Loan Programs, USDA, Farm Service Agency, Washington, DC
**Tracker: Environmental Quality**

**A New Model for Delivering Conservation: Success With the Regional Conservation Partnership Program (RCPP)**

*Salons I & II*

The 2014 Farm Bill authorized the Regional Conservation Partnership Program, providing a new option for conservation program delivery. The RCPP relies on local groups to identify and address conservation needs using the programs administered by NRCS through a partnership agreement. This session will provide the latest perspective on this new approach to cooperative conservation.

**Moderator:** Mark Rose, Director, Financial Assistance Programs Division, USDA, Natural Resources Conservation Service, Washington, DC

**An Overview of the RCPP**

A presentation on the process of developing the conservation partnerships, the types of partnerships that have been funded, and the conservation issues being addressed.

Rebekah Lauster, RCPP Program Specialist, USDA, Natural Resources Conservation Service, Washington, DC

**The Nature Conservancy and RCPP**

The Nature Conservancy is quite an active partner of the NRCS and has active partners engaged in multiple projects from coast to coast. What lessons have been learned from the multiple interactions with RCPP?

Jennifer Conner Nelms, Senior Policy Advisor, Agriculture, The Nature Conservancy, Arlington, VA

**Building Upon Existing Conservation Projects: City of Cedar Rapids**

Learn how new funding allowed Cedar Rapids to partner with soil and water conservation groups, landowners and producers to make a larger impact in the Cedar River Watershed.

Stephen Hershner, Utilities Director, City of Cedar Rapids, Cedar Rapids, IA

**Tracker: Agriculture for the Future**

**The Role of Data In Food Safety**

*Salons V & VI*

With increasing amounts of data available, regulators, industry, and academia have a wealth of information with which to inform decision-making and policy. Data analyses may motivate establishments to improve performance and can highlight strengths and weaknesses which may lead to improved food safety practices.

**Moderator:** Alfred V. Almanza, Deputy Under Secretary, USDA, Office of Food Safety, Washington, DC

**Federal Data Collection, Release, and Usage**

How USDA’s Food Safety and Inspection Service (FSIS) collects and manages data and how that information can be used to improve the safety of the food supply.

Todd Reed, Senior Advisor for Data Integration and Food Defense, USDA, Food Safety and Inspection Service, Washington, DC

**Industry Data Sharing and Usage**

How establishment-specific and industry-collected data and results are used to enhance performance and make improvements in food safety.

Frank Yiannas, Vice President, Food Safety and Health, Walmart, Bentonville, AR

**How Data Can Inform Cost-Effective Food Safety Policy**

Collection and analysis of facility-specific data to inform evidence-based policy, with a focus on food safety regulations that influence public health.

Timothy Beatty, Professor, Agricultural Economics, University of California, Davis, Davis, CA

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6:30 p.m.

**DINNER SPEAKER**

Salons III & IV

Zippy Duvall
American Farm Bureau Federation
President

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Farm Policy Changes: Home and Abroad

Salons A & B
Farm policy changes are on the horizon both here in the United States and abroad. This session brings together three agricultural policy experts to discuss the challenges and opportunities for policy reform in their region.

Moderator: Robert Johansson, Chief Economist, USDA, Office of the Chief Economist, Washington, DC

Drivers, Challenges, and Priorities in Modernizing and Simplifying the Common Agricultural Policy (CAP)
Identifying economic, environmental, and climate change drivers around which the debate for the future of the CAP evolves.

Tassios Haniotis, Director - Strategy, Simplification and Policy Analysis, DG Agriculture and Rural Development, European Commission, Brussels, Belgium

Brexit - UK Farming Steps Out Into the World
UK farming has operated under the CAP for over 40 years. Now facing a new world with unknown details but a clear direction, what are the challenges and can it survive?

Paul Temple, Chair, Cereals and Oilseeds Sector Board, Agricultural & Horticultural Development Board, Kenilworth, Warwickshire, United Kingdom

U.S. Farm Policy: Continuity or Change?
The 2014 Farm Bill made important changes, but also continued key features of past policies. Competing forces could result in mild “tweaks” or a new path forward.

Patrick Westhoff, Professor and Director, Food and Agricultural Policy Research Institute, Columbia, MO

Making Decisions in a Changing Climate: Tools and Resources for Farmers and Managers

Salons V & VI
Three examples provided of how climate change considerations can be incorporated into decisions made by farmers, land managers, and agricultural supply chain organizations.

Moderator: Beatrice Van Horn, Director, Northwest Climate Hub, USDA, Forest Service, Corvallis, OR

Adaptation Workbook: A Climate Change Tool for Agricultural Management and Conservation
A look at the Climate Change Adaptation Workbook, which is a structured process to respond to the effects of climate change on individual agricultural operations.

Michael Kucera, Agronomist, USDA, Natural Resources Conservation Service, Lincoln, NE

Making Decisions for an Uncertain Future: Farmer Decisionmaking
Examples of how farmers have integrated climate change into their operational decisions.

Chad Kruger, Director, NW WA Research & Extension Center; Director, WSU Center for Sustaining Agriculture, Washington State University, Mount Vernon, WA

Incorporating Climate Change and Sustainability into Kellogg’s Decisionmaking
How the Kellogg company has integrated climate change into its operations and sustainability goals.

Diane Holdorf, Chief Sustainability Officer, Kellogg, Battle Creek, MI

Grains and Oilseeds Outlook

Salons III & IV

Moderator: Daniel Whitley, Deputy Administrator, USDA, Foreign Agricultural Service, Washington, DC

USDA Grains and Oilseeds Outlook
Rachel Trego, Agricultural Economist, USDA, Foreign Agricultural Service, Washington, DC

LaNiña and Its Impact on Agriculture
Eric Luebehusen, Meteorologist and Geographic Information System (GIS) Specialist, USDA, World Agricultural Outlook Board, Washington, DC

Russian Wheat: The New Reference for Cash Wheat Worldwide
Swithun Still, Director, Solaris Commodities S.A., Morges, Switzerland

Freedom To Choose: Scientific Evidence vs. Fake News
The role of science in the evaluation of foods based on genetically modified design.

L. Val Giddings, Senior Fellow, Information Technology & Innovation Foundation, Silver Spring, MD
Americans’ Health Choices: Implications for the U.S. Sugar Industry
Discussion of Americans’ attitudes on changing U.S. diets and consumption of sugar-based sweeteners, as well as the reaction of food companies and implications for the Sugar Program.

**Speaker:** Owen Wagner, Senior Economist, North America, LMC International, New York, NY

Beet Versus Cane: Challenges to the U.S. Sugar Program
Demand for non-genetically modified sugar has challenged the management of the U.S. Sugar Program. What factors should USDA address for future successful program management?

**Speaker:** Mike McConnell, Agricultural Economist, USDA, Economic Research Service, Washington, DC

**TRACK: MARKETING AND CONSUMER-DRIVEN PRACTICES**

Growing Demand for Cage-Free Eggs

**Salons I & II**
Demand for cage-free eggs is growing rapidly. Accounting for just 4.5% of egg production in 2015, cage-free eggs are projected to account for more than 70% of conventional production in 2025. However, most of the increased demand comes at the end of that period (cage-free share projected to be less than 16% in 2022), and increasing supplies will require new investments in facilities.

**Moderator:** Mike Sheats, Director, Agricultural Analytics Division, USDA, Agricultural Marketing Service, Washington, DC

Overview of the Transition to Cage-Free Production
An overview of the transition to cage-free production and address how the market will reach equilibrium.

Hongwei Xin, Director, Egg Industry Center, Iowa State University, Ames, IA

Producers’ Perspective
There are many challenges on the road from current production practices to cage-free production. The discussion is on how producers will adapt to the changing marketplace.

Alan Andrews, Director of Marketing, Cal-Maine Foods, Incorporated, Jackson, MS

Buyers’ Perspective
What motivated the sea change in demand for cage-free eggs? The discussion is on what motivated McDonald’s to commit to using only cage-free eggs.

R. Todd Bacon, Senior Director, Quality System – U.S. Supply Chain Management, McDonald’s U.S., Oak Brook, IL

**TRACK: FARM POLICY AND FUNDING**

Farm Safety Net

**Salons A & B**
Federal crop insurance is an effective part of the farm safety net. New program options have expanded the number and types of producers purchasing crop insurance. Access to credit is essential for producers, especially when commodity prices are low. Crop insurance helps producers manage risk, attain loans, and keep the rural economy strong.

**Moderator:** Michael Alston, Associate Administrator, USDA, Risk Management Agency, Washington, DC

Risk Management and the Rural Economy
Crop insurance is the linchpin of the farm safety net. It provides affordable and reliable risk management for producers, who are the economic center of the rural economy.

**Speaker:** Tom Zacharias, President, National Crop Insurance Services, Overland Park, KS

Farm Loans and Crop Insurance
The impact of crop insurance coverage on access to farm credit has been researched and shown to be an effective way to reduce the risk of exposure for producers seeking loans.

**Speaker:** Mark Jensen, Senior Vice President and Chief Risk Officer, Farm Credit Services of America, Omaha, NE

More Crop Insurance Options Means More Can Access Credit
New options for beginning, organic, and diversified producers, brought in producers who had previously never purchased crop insurance, expanding their credit options as well.

**Speaker:** Dean Benson, Senior Vice President of Insurance Services, Northwest Farm Credit Services, Sunnyside, WA

**TRACK: WATER AND CLIMATE**

Building Resilience in a Water Scarce World

**Salons V & VI**
Recent drought conditions in the West impacted all facets of our society, from food production to water quality and public health. There is a growing recognition that we need to better prepare for future droughts and reduce the impact of water scarcity on agriculture and the economy. This session will focus on resources to improve water management and build resilience to drought.

**Moderator:** John Larson, Senior Vice President of Policy and Programs, American Farmland Trust, Washington, DC

Climate, Drought, Water, and Food Security
Climate change is likely to affect global, regional, and local food security by disrupting food availability, decreasing access to food, and making utilization more difficult.

**Speaker:** Margaret Walsh, Senior Ecologist, USDA, Office of the Chief Economist, Washington, DC

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Water Scarcity and Farmer Adaptation
Farmers have considerable flexibility to adapt to changes in local weather, resource conditions, and price signals by adjusting crops, rotations, and production practices.
Steve Wallander, Economist, USDA, Economic Research Service, Washington, DC

Five Policy Recommendations To Improve Response to Drought in the American West
Coping with drought is a major challenge for the West. This presentation will propose five, pragmatic, near-term reforms that can help Western States better manage drought.
Ellen Hanak, Senior Fellow and Center Director, Public Policy Institute of California, San Francisco, CA

Water Markets, Management and Pricing
Water markets provide opportunities for farmers to receive payments for water management practices that protect quality, improve retention, and encourage conservation.
Nicholas Brozovic, Director of Policy, University of Nebraska, Water for Food Institute, Lincoln, NE

TRACK: Commodity Outlooks
Livestock and Poultry Outlook
Salons III & IV

Outlook for the U.S. Livestock and Poultry Sectors
Shayle Shagam, Livestock and Poultry Analyst, USDA, Office of the Chief Economist, Washington, DC

Production Efficiency and Capacity in the Livestock and Meat Industry – Finding Balance
John S. Nalivka, President, Sterling Marketing Incorporated, Vale, OR

An Update on the Global Highly Pathogenic Avian Influenza Situation
Lisa M. Ferguson, Director of Science and Policy, National Import Export Services, Veterinary Services, USDA, Animal and Plant Health Inspection Service, Riverdale, MD

TRACK: Commodity Outlooks
Cotton Outlook
Salons J & K
The session includes USDA’s preliminary supply and demand outlook for the 2017/18 marketing year, a report on current strategies used in the global marketing of Supima cotton, and a presentation on weather analysis as it relates to projecting cotton yields in India.
Moderator: Jody Campiche, Vice President, Economics and Policy Analysis, National Cotton Council, Cordova, TN

The World and U.S. Cotton Outlook for 2017/18
Lyman Stone, Agricultural Economist, USDA, Foreign Agricultural Service, Washington, DC

Successes and Challenges of Marketing Supima Cotton
Marc Lewkowitz, President and Chief Executive Officer, Supima, Tempe, AZ

Weather-Driven Cotton Yield Analysis for India
Brian Morris, Agricultural Meteorologist, USDA, Office of the Chief Economist, Washington, DC

TRACK: Marketing and Consumer-Driven Practices
Marketing-Driven Changes in Agricultural Production
Salons I & II
Changes in production methods have traditionally been driven by technology changes that result in increases in efficiency or decreases in cost. Recently, however, production changes have been increasingly market driven. A look at three of these recent changes.
Moderator: Laura Batcha, Executive Director, Organic Trade Association, Washington, DC

Slow-growing Chickens
Perdue is changing production methods “to address broiler chicken growth rates that cause discomfort to birds.” What’s the motivation behind this decision?
Bruce Stewart-Brown, Senior Vice President, Food Safety and Quality, Perdue Farms, Lothian, MD

Antibiotic-Free Animal Agriculture
Antibiotic use in food animal production is the subject of intense public scrutiny. The organic sector has been a leader in eliminating the use of antibiotics in production.
George Siemon, Chief Executive Officer, Organic Valley, La Farge, WI

Elimination of Gestation Crates for Hogs
There has been growing consumer backlash to the practice of housing sows in gestation crates. Smithfield has announced that it will eliminate the use by 2017.
Stewart Leeth, Vice President, Regulatory Affairs and Chief Sustainability Officer, Smithfield, Smithfield, VA

Local Foods
Among the marketing-driven changes in agriculture, local foods has been among the most widespread. This speaker will address the trend.
Maisie Ganzler, Chief Strategy & Brand Officer, Bon Appétit Management Company, Palo Alto, CA

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12:15pm – 1:30pm

**TRACK: Luncheons**

**Cotton and Fibers**  
_Salons J & K_

**Moderator:** Terry Townsend, Consultant, Cotton Analytics, Houston, TX

The Progress of West African Cotton Production and Trade  
His Excellency Mr. Tiéna Coulibaly, Ambassador of Mali, will present his perspective on the progress and challenges of the cotton industry in Mali and West Africa.  
_His Excellency Mr. Tiéna Coulibaly, Ambassador of Mali, Washington, DC_

**TRACK: Luncheons**

**Sugar and Sweeteners**  
_Salons C, D, & E_

**Moderator:** Barbara Fecso, Director, Dairy & Sweeteners Analysis Group, USDA, Farm Service Agency, Washington, DC

A Policymaker’s Perspective on Managing the U.S. Sugar Program  
What it was like having to make tough decisions managing the U.S. sugar program and the challenges that came with increased sweeteners’ trade with Mexico under NAFTA.  
_Michael Scuse, Secretary, Delaware Department of Agriculture, Dover, DE_

**TRACK: Luncheons**

**Specialty Crops**  
_Salons A & B_

**Moderator:** Chavonda Jacobs-Young, Administrator, USDA, Agricultural Research Service, Washington, DC

Food and Agriculture Global Trends  
Examining global trends in food and agriculture, the interplay between food safety and public perception of risk, and how organizations build trust to navigate these trends.  
_Jack Bobo, Chief Communications Officer, Intrexon Corporation, Germantown, MD_

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

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**TRACK: Luncheons**

Grains and Oilseeds  
_Salons III & IV_

**Moderator:** Daniel Whitley, Deputy Administrator, Office of Global Analysis, USDA, Foreign Agricultural Service, Washington, DC

Outlook for Grains and Oilseeds in 2017  
_Dan Basse, President, AgResource Company, Chicago, IL_

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**TRACK: Luncheons**

Livestock and Poultry  
_Salons V & V_

**Moderator:** Warren Preston, Deputy Chief Economist, USDA, Office of the Chief Economist, Washington, DC

Meat-ing the Challenge: Expanding Integrated Protein Supply Chains Across Asia  
Challenges and opportunities facing Brazil and the United States in marketing meat versus grain proteins.  
_Marcos S. Jank, Vice President, Corporate Affairs and Business Development – Asia Pacific, BRF ASIA-PACIFIC, Singapore_

2:00pm - 3:30pm

**TRACK: SPS Trade Agreement Enforcement**

Sanitary and Phytosanitary (SPS) Measures and U.S. Agricultural Exports  
_Salons J & K_

**Moderator:** Robert Macke, Deputy Administrator, USDA, Foreign Agricultural Service, Washington, DC

Sanitary and Phytosanitary (SPS) Standards Implementation  
The science in support of trade policy, SPS issues including our bilateral process and our efforts to establish Meta standards for global trade.  

Industry Experience  
SPS measures play a progressively critical role in shaping the flow of international trade and are increasingly important to a number of U.S. agricultural producers.  
_Christian Schlect, President, Northwest Horticultural Council, Yakima, WA_

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Analytical Findings: Sanitary and Phyto sanitary (SPS) Measures and Agricultural Trade
Research findings on specific SPS actions or trade concerns, the effects of SPS measures on a specific U.S. Ag sector, or the gains from trade agreements.
Jason Grant, Associate Professor and Director of the Center for Agricultural Trade, Virginia Tech University, Blacksburg, VA

TRACK: GMO LABELING

GMO Disclosure: Transparency for the Market
Salons A & B
Labeling of genetically modified organisms may be the leading agricultural marketing policy issue today. This session will express a range of viewpoints regarding GMO products and their marketing, framed by discussion of the 2-year rule-making USDA is undertaking to implement the new GMO disclosure law.
Moderator: Craig Morris, Deputy Administrator, USDA, Agricultural Marketing Service, Washington, DC

The Manufacturer’s Perspective
The manufacturer of one of America’s best-known brands shares the challenges and opportunities in mandatory GMO disclosure.
Denise M. Morrison, President and CEO, Campbell Soup Company, Camden, NJ

The Farmer’s Perspective
A national farmer leader will discuss how GMO disclosure can reshape the production process and impact farmers.
Charles “Chip” Bowling, Chairman, National Corn Growers Association, Newburg, MD

The Economic Perspective
A leading agricultural biotechnology economist discusses industry and public interests in the GMO disclosure rule-making.
Nicholas Kalaitzandonakes, MSMC Endowed Professor of Agribusiness Strategy, Director of the Economics and Management of AgroBio, University of Missouri, Columbia, MO

TRACK: COMMODITY OUTLOOK

Dairy Outlook
Salon III
Moderator: Roger Cryan, Director, Economics Division Dairy Program, USDA, Agricultural Marketing Service, Washington, DC

Outlook for the U.S. Dairy Sector

Labor Constraints and the Dairy Sector
David P. Anderson, Professor and Extension Economist, Department of Agricultural Economics, Texas A&M University, College Station, TX

The Economics of Robotic Milking Systems
Dr. Larry Tranel, Dairy Specialist, Iowa State University Extension and Outreach, Iowa State University, Dubuque, IA

TRACK: BIO-BASED OPPORTUNITIES

The BIO-Economy: Fuels, Jobs and Power
Salons V & VI
The bioeconomy can transform rural economies through the development of new products across several sectors, providing new markets and creating jobs to build stronger rural economies.
Moderator: Harry Baumes, Director, Office of Energy Policy and New Uses, USDA, Office of the Chief Economist, Washington, DC

Wood Generating Power, Stronger Economies
Virginia’s Southside community of Halifax is the site of a new biomass facility with enough renewable energy to power 16,000 homes from wood waste while also creating jobs.
John Rainey, Director of Origination and Plant Operations, NOVEC, Northern Virginia Electric Cooperative, Manassas, VA

Biofuels Producing Energy, Jobs
Alternative fuels are powering jet engines and creating jobs, helping strengthen rural economies.
Steve Csonka, Executive Director, Csonka Aviation Consultancy, LLC, Lebanon, OH

Bioproducts Creating Job Opportunities
Bio-based products have the potential to spur growth in rural areas by creating opportunities for production, distribution, and sales.
Wes Bolson, Head, Global Business Development & External Affairs, Cool Planet, Greenwood Village, CO

TRACK: NUTRITION

Nutritional Security Through Agricultural Production
Salons I & II
Nutritional security is often defined as continuous access to adequate nutrients in food that are necessary to live a healthy and active life. The goal of this session is to describe the factors that impact what is produced and the health outcomes in consumers. Discussion will center around how agricultural production can positively influence nutritional security of our Nation.
Moderator: Sonny Ramaswamy, Director, USDA, National Institute of Food and Agriculture, Washington, DC

Promoting Nutritional Security Through USDA Nutrition Programs
How does the Federal nutrition program support farmers and producers while reducing food insecurity for vulnerable Americans?
Melissa Abelev, Assistant Deputy Administrator, USDA, Food and Nutrition Service, Alexandria, VA

Consumer Issues and Food-Choice Behavior
What drives consumer food choices and how do these choices impact an individual’s overall nutritional well-being?
David Buys, Extension/Research Assistant Professor and State Health Specialist, Mississippi State University, Mississippi State, MS

Production Agriculture’s Choices: What Drives What Is Produced?
What factors, such as economics, consumer behavior, and the environment, play in what is produced?
Robert Guenther, Senior Vice President, Public Policy, United Fresh Produce Association, Washington, DC
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Student Diversity Program Winners

Undergraduate Winners
Sarah Baskins, California State University, Stanislaus
Taylor Boone, University of Maryland College Park
Zhane Brown, Prairie View A&M University
Nakia Coit, University of Maryland Eastern Shore
Nora Faris, University of Missouri
Carlos Flores, Kansas State University
Vanessa Garcia Polanco, University of Rhode Island
Joshua Harms, Oregon State University
Helena Hollins, Langston University
Brandon Jackson, University of Maryland Eastern Shore
Jeremy Jolly, South Carolina State University
Brittney Langer, California State University, Chico
Vivian Maier, Fresno State University
James Martin, North Carolina A&T State University
Virginia Miller, University of Nevada
Rocio Ortiz, San Diego State University, Imperial Valley
Deja Perkins, Tuskegee University
Matthew Schroepfer, South Dakota State University
Bailey Thomas, Texas State University
Jessica Vallejo, San Diego State University

Graduate Winners
Benjamin Brown, University of Missouri
Tiffany Carter, Kansas State University
Jabari Hawkins, University of Maryland Eastern Shore
Grant Lapke, Oklahoma State University
Gregory McNealy, Florida A&M University
Luis Rodriguez-Cruz, University of Puerto Rico, Mayaguez
Timothy Silberg, Michigan State University
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