

**2027 USDA EXPLANATORY NOTES – OFFICE OF THE CHIEF ECONOMIST**

*Table of Contents*

Preface ..... 3

Agency-Wide..... 3

    Purpose Statement..... 3

    GAO Reports..... 4

    Available Funds and FTEs ..... 5

    Permanent Positions by Grade and FTEs..... 5

    Shared Funding Projects ..... 6

Account 1: Office of the Chief Economist ..... 7

    Appropriations Language..... 7

    Lead-Off Tabular Statement ..... 7

    Project Statements..... 7

    Justification of Changes..... 8

    Geographic Breakdown of Obligations and FTEs ..... 8

    Object Classification..... 9

    Status of Programs..... 11

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**PREFACE**

This publication summarizes the fiscal year (FY) 2027 Budget for the U.S. Department of Agriculture (USDA). Throughout this publication any reference to the “Budget” is in regard to the 2027 Budget, unless otherwise noted. All references to years refer to fiscal year, except where specifically noted. The budgetary tables throughout this document show actual amounts for 2024 and 2025, Working Families Tax Cut Act, Agriculture, Rural Development, Food and Drug Administration, and Related Agency Appropriations Act, 2026, and the President’s Budget request for 2027. Amounts for 2026 estimated levels include: non-enacted amounts such as Full-Time Equivalent levels, fleet levels, information technology investment levels, recovery levels, transfers in and out, balances available end of year, and obligation levels.

Throughout this publication, the “Working Families Tax Cut Act” is used to refer to the Public Law 119-21.

Pursuant to the Balanced Budget and Emergency Deficit Control Act of 1985, sequestration is included in the numbers for mandatory programs in 2024, 2025, 2026 and 2027.

In tables throughout this document, amounts equal to zero (0) are displayed as dashes (-). Amounts less than 0.5 and greater than zero are rounded and shown as a zero (0). This display treatment is used to prevent the masking of small non-zero amounts that do not round up to one (1). Due to rounding, some tables may not sum exactly.

**AGENCY-WIDE****PURPOSE STATEMENT**

The Office of the Chief Economist (OCE) was created by the Secretary of Agriculture under the authority of the Department of Agriculture Reorganization Act of 1994, Public Law 103-354. OCE coordinates analyses by economists across USDA and advises the Secretary of Agriculture on the economic situation in agricultural markets and the economic implications of policies and programs affecting American agriculture and rural communities. OCE is the voice of USDA for agricultural market intelligence and economic analysis and aims to inform public and private decision makers by providing unbiased and rapid-response information and data-driven analyses of current and emerging issues impacting agriculture and rural America.

The mission of OCE is to be the gold standard for agricultural market intelligence and economic analysis, while facilitating a regulatory environment that supports agriculture.

Utilizing staff resources across USDA, OCE’s work contributes to the backbone of policies that support farmers and ranchers and enhance the competitiveness of American agriculture. OCE provides economic expertise and up-to-date assessments of market and policy developments that could affect U.S. agricultural markets and farm sector prosperity. OCE also serves as a coordinating office for a number of the Department’s cross-agency initiatives and programs. OCE is responsible for several statutory requirements:

- coordinating USDA’s situation and outlook material and chairing the Interagency Commodity Estimates Committees in the release of the monthly market sensitive World Agricultural Supply and Demand Estimates (WASDE) report;
- serving as a focal point for economic analysis for the Office of the Secretary on emerging issues impacting the agricultural sector;
- coordinating USDA activities related to H-2A workers and other agricultural labor issues under the Immigration and Nationality Act;
- reviewing risk assessments and cost-benefit analyses for significant proposed USDA regulations;
- supporting development of agricultural policies and coordinating activities within USDA related to pesticides and the development and use of pest management tools, as well as

coordinating with the Environmental Protection Agency, the authority primarily responsible for pesticide regulations, the Food and Drug Administration, and other Federal and state agencies to ensure that actions taken to address potential risks from pesticide exposures do so with minimal impact to farmers and ranchers who need pest control tools to feed, fuel, and clothe the nation;

- supporting the Office of the Secretary and coordinating energy-related activities within USDA;
- developing technical guidelines for quantifying the environmental and conservation benefits of U.S. agricultural production to facilitate the participation of farmers, ranchers, and forest landowners in emerging environmental services markets;
- carrying out duties specified under the Global Climate Change Prevention Act, including coordinating policy analysis, long range planning, research, and response strategies related to extreme weather events (droughts, fires, hurricanes, etc.).

OCE also houses USDA’s Biotechnology Coordinator who coordinates USDA activities in the areas of biotechnology and sustainable development, which benefits farmers and ranchers by supporting new products and promoting productivity growth as a key component of creating sustainable food systems.

The OCE Headquarters is in Washington, D.C. As of September 30, 2025, there were 55 permanent full-time employees.

**GAO REPORTS**

***Table OCE-1. Closed, Implemented GAO Reports***

<b>ID</b>	<b>Date Opened</b>	<b>Date Closed</b>	<b>Title</b>	<b>Result</b>
23-104557	01/17/2023	03/26/2025	Climate Change: Options to Enhance the Resilience of Agricultural Producers and Reduce Federal Fiscal Exposure	Recommendation 1 – GAO recommended USDA analyze 13 specific options and integrate them into its ongoing climate resilience planning. To address the recommendation, OCE, in coordination with CEQ, released the Previous Administration’s USDA Climate Adaptation Plan 2024-2027, which considered the options identified in the GAO’s report.

**AVAILABLE FUNDS AND FTEs**

**Table OCE-2. Available Funds and FTEs (thousands of dollars, FTEs)**

Item	2024		2025		2026		2027	
	Actual	FTEs	Actual	FTEs	Estimated	FTEs	Estimated	FTEs
Salaries and Expenses:								
Discretionary Appropriations.....	\$30,500	58	\$30,500	55	\$29,500	60	\$14,997	51
Mandatory Appropriations .....	100	-	-	-	5,000	-	-	-
Total Adjusted Appropriation .....	30,600	58	30,500	55	34,500	60	14,997	51
Balance Available, SOY.....	148	-	134	-	93	-	-	-
Total Available .....	30,748	58	30,634	55	34,593	60	14,997	51
Lapsing Balances.....	-257	-	-275	-	-	-	-	-
Balance Available, EOY.....	-134	-	-93	-	-	-	-	-
Total Obligations .....	30,357	58	30,266	55	34,593	60	14,997	51
Other USDA:								
Annual Outlook Forum .....	270	-	268	-	322	-	328	-
NASA/USGCRP .....	433	-	-	-	-	-	-	-
Environmental Markets .....	700	-	700	-	700	-	700	-
Climate Hub Coordinator.....	303	-	269	-	-	-	-	-
Payment for Staff Details .....	101	-	38	-	-	-	-	-
WASDE Support .....	375	-	271	-	305	-	340	-
Kynetec Data .....	65	-	127	-	-	-	-	-
Future Leaders Program Support .....	48	-	-	-	-	-	-	-
Total Obligation, Other USDA.....	2,295	-	1,673	-	1,609	-	1,656	-
Total Obligations, OCE .....	32,652	58	31,939	55	36,202	60	16,653	51
Other Federal Funding:								
EPA, GHG Support .....	355	-	-	-	-	-	-	-
Total, Other Federal .....	355	-	-	-	-	-	-	-
Total Available, OCE .....	33,007	58	31,939	55	36,202	60	16,653	51

**PERMANENT POSITIONS BY GRADE AND FTEs**

**Table OCE-3. Permanent Positions by Grade and FTEs**

Item	2024			2025			2026			2027		
	HQ	Field	Total	HQ	Field	Total	HQ	Field	Total	HQ	Field	Total
SES .....	5	-	5	6	-	6	6	-	6	6	-	6
SL.....	2	-	2	1	-	1	2	-	2	2	-	2
GS-15.....	29	-	29	26	-	26	22	3	25	21	3	24
GS-14.....	13	-	13	12	-	12	16	1	17	12	-	12
GS-13.....	3	-	3	3	-	3	3	-	3	3	-	3
GS-12.....	3	-	3	3	-	3	2	-	2	3	-	3
GS-11.....	2	-	2	3	-	3	2	1	3	2	-	2
GS-9.....	1	-	1	1	-	1	-	-	-	-	-	-
Total Permanent..	58	-	58	55	-	55	53	5	58	48	3	51
Total Perm. FT EOY.	58	-	58	55	-	55	53	5	58	48	3	51
FTE <sup>1</sup> .....	61	-	61	58	-	58	55	5	60	48	3	51

<sup>1</sup> Total FTEs are all inclusive of workforce categories including temporary positions.

**SHARED FUNDING PROJECTS**

**Table OCE-4. Shared Funding Projects (thousands of dollars)**

Item	2024 Actual	2025 Actual	2026 Estimated	2027 Estimated
<b>Administrative Services:</b>				
AskUSDA Contact Center .....	\$4	\$4	-	-
General Counsel Legal Compliance .....	-	2	21	21
Human Resources Enterprise System Management .....	2	2	5	5
Integrated Procurement Systems .....	11	11	17	17
Mail and Reproduction Management Division.....	45	35	29	29
Material Management Service Center.....	20	19	17	17
Personnel and Document Security Program .....	3	4	3	-
Procurement Operations Division.....	-	-	65	65
Subtotal.....	85	77	157	154
<b>Communications:</b>				
Creative Media & Broadcast Center.....	6	1	20	20
Internal Control Support Services .....	13	11	1	1
Financial Shared Services.....	35	32	27	26
National Finance Center .....	18	17	18	18
Subtotal.....	66	60	46	45
<b>Information Technology:</b>				
Client Experience Center.....	343	376	350	339
Department Administration Information Technology Office.....	194	205	171	-
Digital Infrastructure Services Center.....	58	54	48	221
Enterprise Cybersecurity Services .....	31	39	38	38
Enterprise Data and Analytics Services .....	230	148	143	144
Enterprise Network Services.....	40	38	-	-
Subtotal.....	896	860	750	742
<b>Correspondence Management Services:</b>				
Office of the Executive Secretariat .....	96	32	26	26
Total, Working Capital Fund .....	1,149	1,030	999	987
<b>Department-Wide Shared Cost Programs:</b>				
Agency Partnership Outreach .....	5	5	2	2
Diversity, Equity, Inclusion, and Accessibility .....	2	-	-	-
Employee Experience.....	2	2	-	-
Medical Services .....	18	-	-	-
NCR Interpreting Services .....	7	8	8	8
OCFO Shared Services Branch.....	-	-	-	1
Office of Customer Experience.....	2	1	-	-
Physical Security.....	3	4	2	2
Security Detail.....	3	5	10	10
Security Operations .....	5	4	4	4
Talent Group .....	2	2	-	-
TARGET Center .....	1	1	1	1
Total, Department-Wide Reimbursable Programs .....	50	32	27	28
Agency Total .....	1,199	1,062	1,026	1,015

**ACCOUNT 1: OFFICE OF THE CHIEF ECONOMIST**

**APPROPRIATIONS LANGUAGE**

The appropriations language follows (new language underscored; deleted matter enclosed in brackets):

*Office of the Chief Economist*

For necessary expenses of the Office of the Chief Economist, [~~\$29,500,000~~]\$14,997,000.

**LEAD-OFF TABULAR STATEMENT**

**Table OCE-5. Lead-Off Tabular Statement (in dollars)**

Item	Amount
Estimate, 2026 .....	\$29,500,000
Change in Appropriation .....	<u>- 14,503,000</u>
Budget Estimate, 2027 .....	<u>14,997,000</u>

**PROJECT STATEMENTS**

**Table OCE-6. Project Statement on Basis of Appropriations (thousands of dollars, FTEs) <sup>2</sup>**

Item	2024 Actual	FTEs	2025 Actual	FTEs	2026 Estimated	FTEs	2027 Estimated	FTEs	Inc. or Dec.	FTE Inc. or Dec.	Chg Key
Discretionary Appropriations:											
Office of the Chief Economist .....	\$30,000	57	\$30,000	54	\$29,000	59	\$14,997	51	-\$14,003	-9	(1)
Food Loss & Waste Liaison .....	500	1	500	1	500	1	-	-	-500	-	
Subtotal Disc. Approps .....	30,500	58	30,500	55	29,500	60	14,997	51	-14,503	-9	
Mandatory Appropriations:											
Multiple Crop and Pesticide											
Survey .....	100	-	-	-	5,000	-	-	-	-5,000	-	
Total Appropriation .....	30,600	58	30,500	55	34,500	60	14,997	51	-19,503	-	
Bal. Available, SOY .....	148	-	134	-	93	-	-	-	-93	-	
Total Available .....	30,748	58	30,634	55	34,593	60	14,997	51	-19,596	-	
Lapsing Balances .....	-257	-	-275	-	-	-	-	-	-	-	
Bal. Available, EOY .....	-134	-	-93	-	-	-	-	-	-	-	
Total Obligations .....	30,357	58	30,266	55	34,593	60	14,997	51	-19,596	-9	

**Table OCE-7. Project Statement on Basis of Obligations (thousands of dollars, FTEs) <sup>3</sup>**

Item	2024 Actual	FTEs	2025 Actual	FTEs	2026 Estimated	FTEs	2027 Estimated	FTEs	Inc. or Dec.	FTE Inc. or Dec.
Discretionary Obligations:										
Office of the Chief Economist .....	\$29,743	57	\$29,725	54	\$29,093	59	\$14,997	51	-\$14,096	-9
Food Loss & Waste Liaison .....	500	1	500	1	500	1	-	-	-500	-
Subtotal Disc Obligations .....	30,243	58	30,225	55	29,593	60	14,997	51	14,596	-9
Mandatory Obligations:										
Multiple Crop and Pesticide										
Survey .....	114	-	41	-	5,000	-	-	-	-5,000	-
Subtotal Mand Obligations .....	114	-	41	-	5,000	-	-	-	-5,000	-
Total Obligations .....	30,357	58	30,266	55	34,593	60	14,997	51	-19,596	-9
Add back:										
Lapsing Balances .....	257	-	275	-	-	-	-	-	-	-
Balances Available, EOY:										
Multiple Crop and Pesticide										
Survey .....	134	-	93	-	-	-	-	-	-	-
Total Available .....	30,748	58	30,634	55	34,593	60	14,997	51	-19,596	-9
Less:										
Bal. Available, SOY .....	-148	-	-134	-	-93	-	-	-	+93	-
Total Appropriation .....	30,600	58	30,500	55	34,500	60	14,997	51	-19,503	-9

<sup>2</sup> This table does not match MAX Schedule X due to reimbursables.

<sup>3</sup> This table does not match MAX Schedule X due to reimbursables.

**JUSTIFICATION OF CHANGES**

Base funds will allow OCE to continue providing economic expertise, analysis, and coordination on a wide range of Departmental activities and initiatives, as well as advising the Secretary of Agriculture on the economic implications of Department policies, programs, and proposed legislation through data-driven analyses of current and emerging issues impacting agriculture and rural America. In accordance with administration policy announced in the Budget, OCE will follow new government-wide grants guidance prohibiting the use of Federal funds to pay for subscriptions to academic journals, as well as for the publication of research results that are not specifically required by Federal statute or approved in advance by a Federal agency. This policy preserves funds to support actual research by ensuring that the American taxpayer does not pay for the research, publication, and access to that research, essentially triple-charging the public for the same product.

The numbers and letters of the following listing relates to values in the Change (Chg) Key column of the Project Statement:

- (1) A decrease of \$14,503,000 and 9 FTEs to the Office of the Chief Economist (\$29,500,000 and 60 FTEs available in 2026).

The funding change is requested for the following items:

- A) A decrease of \$14,500,000 and 9 FTEs to the Office of the Chief Economist.

This decrease eliminates \$10,000,000 in Policy Research Center funding and \$500,000 in Food Loss and Waste funding, and \$4,000,000 in employment costs of 9 FTEs. As the Department looks to consolidate, OCE will leverage economic expertise from USDA’s mission areas to enable continued production of USDA’s World Agricultural Supply and Demand Estimates report and data, and to ensure OCE can continue to provide critical economic analytical support on trade, agricultural, and food policy as well as regulatory reviews.

- B) A decrease of \$3,000 for National Security Related Expenses being transferred to the Office of Homeland Security.

This decrease of \$3,000 for National Security Related Expenses, being realigned to the Office of Homeland Security (OHS), will enhance efficiency and effectiveness within USDA. This strategic realignment will centralize resources under OHS, which provides leadership in national security through policy development, emergency preparedness and response initiatives, and threat mitigation coordination. Consolidating the budget under OHS eliminates redundancies, ensures more coordinated resource allocation, and improves the execution of departmental security policies, ultimately bolstering the USDA’s resilience and readiness without compromising overall security.

**GEOGRAPHIC BREAKDOWN OF OBLIGATIONS AND FTEs**

***Table OCE-8. Geographic Breakdown of Obligations and FTEs for Office of the Chief Economist (thousands of dollars, FTEs)***

State/Territory/Country	2024		2025		2026		2027	
	Actual	FTEs	Actual	FTEs	Estimated	FTEs	Estimated	FTEs
District of Columbia .....	\$30,243	58	\$30,225	55	\$29,500	60	\$14,997	51
Obligations .....	30,243	58	30,225	55	29,500	60	14,997	51
Lapsing Balances .....	257	-	275	-	-	-	-	-
Total, Available .....	30,500	58	30,500	55	29,500	60	31,091	51

**OBJECT CLASSIFICATION**

**Table OCE-9. Classification by Objects – Discretionary Funding (thousands of dollars) <sup>4</sup>**

Item No.	Item	2024 Actual	2025 Actual	2026 Estimated	2027 Estimated
<b>Personnel Compensation:</b>					
	Washington D.C.....	\$9,182	\$10,033	\$9,837	\$8,714
	Personnel Compensation, Field .....	-	-	836	569
11	Total personnel compensation .....	9,182	10,033	10,673	9,283
12	Personal benefits.....	3,284	3,640	3,808	3,074
	Total, personnel comp. and benefits .....	12,466	13,673	14,481	14,736
<b>Other Objects:</b>					
21.0	Travel and transportation of persons .....	270	196	250	100
23.1	Rental payments to GSA.....	6	6	6	6
	Communications, utilities, and misc. charges .....	78	3	50	50
24.0	Printing and reproduction .....	15	19	20	20
25	Other contractual services.....	2,331	2,115	1,545	750
25.1	Advisory and assistance services.....	2,810	1,524	1,350	750
25.2	Other services from non-Federal sources ..	11,877	12,338	11,491	914
25.5	Research and development contracts .....	171	184	200	50
26.0	Supplies and materials.....	117	150	150	-
31.0	Equipment .....	102	17	50	-
	Total, Other Objects .....	17,777	16,552	15,112	2,640
99.9	Total, new obligations.....	30,243	30,225	29,593	14,997
<b>DHS Building Security Payments</b>					
	(included in 25.3) .....	\$13	\$13	\$13	\$13
<b>Position Data:</b>					
	Average Salary (dollars), ES Position .....	\$114,000	\$118,000	\$123,616	\$125,888
	Average Salary (dollars), GS Position.....	\$127,900	\$133,187	\$134,913	\$135,611

<sup>4</sup> This table does not match MAX Schedule O due to reimbursables.

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**STATUS OF PROGRAMS**

The Office of the Chief Economist (OCE) is the focal point for the U.S. Department of Agriculture's economic and policy-related research and analysis. OCE aims to inform public and private decision-makers by providing unbiased information and data-driven analyses of current and emerging issues impacting agriculture. OCE provides economic expertise and coordination on a wide range of Departmental activities and initiatives.

**CURRENT ACTIVITIES**

USDA is one of the leading agencies in the number of economists employed. OCE is able to coordinate and leverage these staff resources in or to provide economic expertise, analyses and support for the Secretary on major issues affecting agriculture and rural America. Working across USDA agencies, the Immediate Office's (IO's) analyses inform the development of agricultural policies and crop insurance options; impacts of trade initiatives and disputes; developments in agricultural commodity markets and challenges facing the sector such as economic impacts related to plant and animal diseases. It is a focal point for the Nation's agricultural economic intelligence, and each year contributes to and publishes USDA's long-term agricultural projections (the USDA Baseline) which provides a Departmental consensus ten-year outlook for the agricultural sector and facilitates budgeting and policy development. The IO also coordinates the Department's analysis of issues and activities involving agricultural labor.

OCE's World Agricultural Outlook Board (WAOB) provides timely, reliable and objective economic forecasts for farmers and other stakeholders in food and agricultural product markets. Key WAOB activities are coordinating the development and release of the monthly *World Agricultural Supply and Demand Estimates* (WASDE) report, a Principal Federal Economic Indicator that has global impact and is USDA's flagship report on agricultural commodity market conditions for strategic commodities in the U.S. and worldwide. These data and information increase market transparency, inform trillions of dollars in commodity market transactions annually, and are the anchor for other Departmental and private sector forecasts and budgeting. The WAOB also coordinates and reviews all outlook and situation material developed within USDA to ensure that USDA "speaks with one voice" regarding commodity market conditions and outlook; performs economic analyses of global commodity markets; and monitors markets and agricultural weather.

Working with staff across USDA, OCE's Office of Risk Assessment and Cost-Benefit Analysis (ORACBA) reviews and clears USDA risk assessments and cost-benefit analyses, supporting significant Departmental rules to ensure they are based on objective, appropriate, and sound economic and risk analyses. ORACBA provides economic expertise in developing USDA deregulatory and necessary regulatory actions assists USDA agencies in complying with Executive Orders and OMB guidance on regulatory analysis. ORACBA also reviews other Department's rules impacting USDA through the E.O. 12866 review process.

The Office of Energy and Environmental Policy (OEEP) is a focal point for the Department on the issues of energy policy, environmental markets, and global change to enhance competitiveness and adaptability of U.S. farmers, ranchers and producers. OEEP provides technical and analytic support to the Office of the Secretary on energy and environmental policy; supports interagency efforts to promote products that use U.S. biomass feedstocks; and works with other federal agencies to develop, implement, and update policies to promote the production and use of biofuels, including the Renewable Fuel Standard. OCE quantifies the environmental and conservation benefits of U.S. agricultural production and ensures that these benefits are recognized; and works with farm groups and commodity organizations to develop new markets for U.S. commodities based on environmental and conservation performance. OEEP coordinates activities with other Federal agencies and represents USDA in international negotiations and discussions to ensure farmers' and ranchers' needs are met. These activities enhance the competitiveness of U.S. agricultural markets and position the people we serve to be energy independent and meet future challenges and opportunities.

OCE's Office of Pest Management Policy (OPMP) directly supports farmers and ranchers by working to maintain their access to the pest management tools they need to produce safe, abundant, and affordable food, feed, fiber, and fuel in the U.S. OPMP leads the development and coordination of Departmental policy on pest management and pesticides, provides Departmental coordination on agricultural biotechnology, and ensures coordination of interagency activities with the Environmental Protection Agency (EPA) and other Federal and state agencies. OPMP collects information on individual growers' pest management practices to ensure regulatory outcomes are based on realistic assumptions and proposes alternate mitigation approaches to Environmental Protection Agency (EPA) in support of maintaining grower access to critical pest control tools.

### **SELECTED EXAMPLES OF RECENT PROGRESS**

#### **IMMEDIATE OFFICE OF THE CHIEF ECONOMIST (IO)**

In 2025, the Immediate Office coordinated across USDA to synthesize economic and policy analysis that supported farmers and ranchers:

#### **AGRICULTURAL POLICY SUPPORT AND MONITORING OF AGRICULTURAL MARKETS**

- Provided rapid response economic insights and analysis of various changes in agricultural markets and economic conditions, as well as policy proposals and regulatory actions to inform Administration officials about impacts on the agricultural and rural sectors – putting U.S. farmers and ranchers first. This enabled USDA to quickly provide support and greater regulatory certainty to the agricultural and rural sectors. This included analysis of the impact of ongoing trade negotiations; effects of animal disease outbreaks such as Highly Pathogenic Avian Influenza and livestock pests such as New World Screwworm; the market-driven supply of fats and oils for the production of biofuels to inform EPA decision making related to the Renewable Fuel Standard; and supply chain impacts of other market disruptors.
- Contributed economic analysis and expertise in the development of several USDA rulemakings. With OCE's ORACBA, reviewed USDA rules and other agencies' rules that impact agriculture and rural America to ensure they are based on objective, appropriate, and sound economic analyses.
- Developed stochastic estimates of prices and production in support of the USDA interagency 10-year baseline economic projections, which are used by policymakers to develop long-term budget outlay projections and facilitate policy analysis.
- Led research and fostered high-priority research conducted by others, increasing the knowledge base to inform the design and ensure impactful outcomes of future policy decisions (ongoing). This includes analysis on Farm Bill proposals, emerging biofuel markets; developing capabilities to model trade policy and impacts of retaliatory tariffs; relationships between crop insurance, farm loans, and financial stress; impacts of state-level animal welfare measures such as California's Proposition 12; and impacts of state-level locomotive regulations (California).
- Ensured American agricultural interests and needs were appropriately represented in international discussions. Represented the U.S. government in agricultural committee meetings of the Organization for Economic Co-operation and Development (OECD) and the OECD Agricultural Ministerial meetings and provided the U.S. perspective and direction on policy discussions and research papers concerning agriculture, trade, and the environment.

#### **TRADE POLICY SUPPORT**

- Represented USDA in numerous interagency settings on multilateral and bilateral trade issues, including World Trade Organization and bilateral trade negotiations and dispute settlement in the WTO or under bilateral trade agreements, providing economic analysis and guidance for several recent agricultural cases. Recent examples include the U.S.-Mexico-Canada Agreement (USMCA) Canada Dairy disputes, the USMCA Mexico biotech corn dispute, and the WTO Spanish Olives dispute.
- Provided policy information and analysis in the U.S. Government responses to countervailing

duty (CVD) investigations of U.S. agricultural products (e.g., Colombia's current CVD investigation of U.S. milk powder) and studies of the impacts of other trade actions taken against U.S. exports, such as retaliatory tariffs and non-tariff measures.

- Contributed to timely and accurate reporting of U.S. domestic support for agriculture to the World Trade Organization, which is required to demonstrate U.S. compliance with WTO commitments. OCE developed and briefed Congress on the annual U.S. domestic support notification to the WTO and also provided analysis of new programs to the Foreign Agricultural Service and the Office of the U.S. Trade Representative. OCE also supports the biannual U.S. subsidies notification to the WTO Subsidies, Countervailing Measures Committee, and other U.S. Government engagements in the WTO and its Committees (e.g., Trade Policy Reviews).

### **CROP INSURANCE**

- As Chairman of the Board of Directors of the Federal Crop Insurance Corporation (FCIC), the Chief Economist presided over quarterly public board meetings during 2025. The FCIC meets four times a year and on an ad-hoc basis, as needed. In 2025, the FCIC Board of Directors approved several products to improve risk management safety nets for farmers.
- Provided economic analysis and proposals that enhance crop insurance as a risk mitigation tool for America's farmers, in a manner that respects taxpayer support to advance an efficient and effective safety net for agricultural producers and the country's food supply. This is accomplished through close coordination and cooperation with RMA and cooperative research.

### **AGRICULTURAL LABOR ACTIVITIES**

- Ensured USDA interests were represented in Department of Labor rules impacting the H-2A program. Provided analyses of legislative and regulatory actions that would affect agricultural labor.

### **ANALYTICAL ASSISTANCE TO CONGRESS, THE EXECUTIVE OFFICE OF THE PRESIDENT, AND OTHER FEDERAL AGENCIES**

- Conducted and spurred research to increase our readiness to provide analytical expertise for policy support for Congress and others, including Farm Bill debates and ex-post analysis of policy impacts.
- OCE regularly offers technical assistance to Congress on a variety of topics. It also provided regular technical assistance to the Council of Economic Advisers, the National Economic Council, and the National Security Agency on economic events of concern. OCE identified and developed new agricultural/rural sector models and data sources to support analytical needs across USDA.

### **DOMESTIC AND GLOBAL FOOD SECURITY**

- Actively monitored domestic and global agricultural commodity markets to provide the Secretary with timely economic analysis related to U.S. agricultural market disruptions and to flag emerging signs of market stress, using data-driven methods.

### **WORLD AGRICULTURAL OUTLOOK BOARD (WAOB)**

- The World Agricultural Outlook Board provided key market intelligence, data and weather monitoring to support producers and agricultural commodity markets:

### **AGRICULTURAL SUPPLY AND DEMAND MONITORING AND REPORTING**

- Published the monthly World Agricultural Supply and Demand (WASDE) report, providing USDA's official world and U.S. supply and utilization estimates and forecasts for grains, oilseeds, and cotton, and official estimates and forecasts for U.S. sugar, red meat, poultry, eggs, and milk. The WASDE report is downloaded between 1.5 million and 2 million times yearly. After each WASDE release, the accompanying Secretary Briefing

presentations are posted on the OCE website for public use, ensuring all interested parties have access to the information.

- Serving as USDA’s focal point for market intelligence, WAOB cleared all USDA/Economic Research Service Commodity Outlook reports for public release on schedule following the monthly WASDE releases.
- Represented the United States on FAO’s Agricultural Market Information System information group, including information sharing and monthly participation in commodity outlook sessions intended to support food market transparency and encourage coordination of policy action in response to market uncertainty.

### **USDA BASELINE PROJECTIONS**

- Managed the development of the USDA interagency 10-year baseline economic projections and cleared the estimates for publication and release. The projections are a departmental consensus on a long-run representative scenario for the agricultural sector for the next decade and identify major forces and uncertainties affecting future agricultural markets; agricultural production, consumption, and trade; and U.S. exports of major farm commodities and future price movements. The long-term agriculture projections, in addition to historic data, can better inform decisions related to agricultural policy. Projections of key market indicators can help decision makers evaluate the effect of various courses of action. USDA uses the data to develop long-term budget outlay projections for the Office of Management and Budget.

### **USDA AGRICULTURAL OUTLOOK FORUM**

- Led all aspects of the annual Agricultural Outlook Forum (AOF), “Meeting Tomorrow’s Challenges, Today.” The Forum is a unique annual event where key stakeholders in the U.S. and worldwide discuss current and emerging topics and trends in the sector. It facilitates information sharing among stakeholders and generates transparency that supports well-functioning open markets. The 2025 AOF was USDA’s 101st Forum, with nearly 1,600 in-person and over 4,500 virtual attendees, making it one of the most widely attended AOFs ever. Attendees represented all facets of the food and agriculture system, including farmers, trade associations, bankers, food companies, USDA employees, academic researchers, and journalists. The two-day program included a keynote address by the USDA Secretary highlighting the new Administration’s priorities and efforts to address critical challenges currently facing farmers and the agriculture sector; an outlook by the Chief Economist on the state of the U.S. agricultural economy; and 30 sessions on issues affecting rural America and agriculture, including a food price and farm income outlook, U.S. trade and the global marketplace, new frontiers in agriculture, managing risk and ensuring sustainability, the rural economy, and commodity outlooks.

**AGRICULTURAL WEATHER MONITORING AND ANALYSIS**

- WAOB meteorologists collaborated closely with WAOB economists and analysts from the Foreign Agricultural Service, Economic Research Service, and other partner agencies to provide essential crop-specific analyses of weather impacts in support of the monthly WASDE reports. Accurate weather information is a critical input to the process of generating the monthly WASDE report by enhancing the accuracy and credibility of global crop production forecasts, which helps in identifying export market opportunities for U.S. agricultural commodities and supports competitive global pricing.
- Collaborated with the National Weather Service to prepare and publish 52 Weekly Weather and Crop Bulletins and issue 260 Daily U.S. Agricultural Weather Highlights. These reports provide detailed and timely information on weather developments that can affect agricultural production in the U.S. and worldwide, which helps farmers and firms along the value chain understand and manage weather-related production risks that can lead to market volatility.
- Provided authorship for, or contributed to, 52 weekly U.S. Drought Monitors. Since the passage of the 2008 Farm Bill, the *U.S. Drought Monitor* (USDM) weekly depictions have triggered more than \$13 billion in direct assistance to U.S. livestock producers via the USDA-administered Livestock Forage Disaster Program. The USDM is also the primary trigger (since 2012) for USDA secretarial drought disaster declarations and has been used for a portion of the payments to U.S. producers applying for assistance through the Emergency Relief Program and the recently announced Supplemental Disaster Relief Program (SDRP). The drought-based SDRP payments, totaling an estimated \$10 billion, will be based on USDM depictions from 2023 and 2024.
- Provided timely information for decisionmakers on drought; and served as an expert source to numerous news outlets on the impacts of extreme weather events on agriculture.

**THE OFFICE OF RISK ASSESSMENT AND COST-BENEFIT ANALYSIS (ORACBA)**

The Office of Risk Assessment and Cost-Benefit Analysis ensured regulations were based on sound science, protecting the ag industry and consumers:

**RISK ANALYSIS LEADERSHIP AND CONSULTATION**

- Reviewed almost all of USDA rules, other agencies' rules impacting USDA, and guidance documents developed by other agencies and sent to USDA for review, ensuring they were robust for external review and met the regulatory requirements for rulemaking. This included providing advice, support, and regulatory impact analyses during the regulatory process for USDA agencies (such as Forest Service, AMS and FNS) to help streamline departmental regulatory reviews and ensure USDA regulations are based on rigorous scientific review and economic analysis.
- Conducted early reviews of EPA's hazard analyses of chemicals, providing feedback on issues that ultimately reduce excessive regulatory burdens on farmers. The resulting toxicity values established in the hazard analyses often become the basis for future risk assessments at the national and state level, that could have major implications to agriculture due to potential restrictions on pesticide use, fertilizer use, other inputs to production, and the ability to sell agricultural products both domestically and abroad.
- Participated in the technical and policy working groups of the Interagency Risk Assessment Consortium to enhance communication and coordination among USDA and other federal agencies regarding food safety and other risk assessment responsibilities.
- Participated in the EPA-USDA-FDA Interagency Working Group examining PFAS contamination and kept USDA apprised of new developments in EPA regulations and other actions that may negatively impact farmers, ranchers and producers (ongoing).

**RISK ASSESSMENT OUTREACH AND TRAINING**

- Sponsored training on a range of topics to bolster USDA agency capabilities. This effort supports the deregulatory agenda by ensuring analysts have information needed to prepare solid and defensible rulemaking analyses. Recent outreach includes training on analysis required by the Small Business Administration and establishing a working group for agency economists involved in regulatory impact analyses for collaboration and training on changing regulatory requirements.

**THE OFFICE OF ENERGY AND ENVIRONMENTAL POLICY (OEEP)**

In 2025, the Office of Energy and Environmental Policy created new economic opportunities for farmers, ranchers, and foresters:

- Published an interim final rule (7 CFR Part 2100) that defines the production of regenerative biofuel feedstocks. The interim rule established procedures for quantifying, tracking, and verifying feedstocks in the biofuel supply chain. These guidelines will create new opportunities to incentivize biofuel feedstock crops grown with regenerative practices and facilitate the participation of farmers in markets for fuels with reduced carbon intensity. Additionally, OEEP published a request for information and held numerous stakeholder meetings, commissioned analysis, and prepared the Rule Workplan for the Office of Management and Budget.
- Undertook numerous initiatives to promote the use of domestic feedstocks for energy use and increase market opportunities for U.S. agricultural commodities.
- Conducted economic analysis on options to expand biofuel consumption from domestically produced feedstocks, including expanding the use of E15 and developing markets for Sustainable Aviation Fuel and maritime biofuel.
- Developed concepts and plans to encourage the production of low carbon biomass feedstocks for sustainable aviation fuel (SAF) and maritime fuels production. OEEP technical experts helped formulate U.S. government positions in international negotiations calling for the fair and accurate treatment of U.S. feedstocks and opposing efforts by Brazil to distort biofuel protocols to their advantage. These efforts were bolstered by OEEP technical analysis of Brazilian land-use patterns that were developed into publications.
- Served as the USDA lead in providing technical feedback to EPA on the draft Renewable Fuel Volumes for 2026 and 2027. In this capacity, OEEP oversaw technical economic modeling that was used to understand the effects of the proposed policies. OEEP also provided recommendations to EPA on how renewable fuel credits should be allocated across time, reflecting farmer and biomass producer interests.
- Provided technical assistance to the Foreign Agricultural Service on biofuel trade-related issues throughout the year. For example, in coordination with FAS, OCE provided information on biofuel markets to USTR with regard to a U.S. government trade dispute with Brazil that involved biofuels-related topics.
- Led USDA engagement in the 1944 Water Treaty negotiations with Mexico and served as the central point of outreach for related work on water with Texas' agencies and agricultural producers in the Rio Grande Valley.
- Initiated work to assess the monetary value of water in Texas and Mexican states along the Rio Grande to justify proposed infrastructure investments that will produce water savings, reduce environmental impacts, and support agriculture in Texas. As a result of the negotiations, Mexico will deliver more Rio Grande water to the United States this year than in the previous four years combined.

**THE OFFICE OF PEST MANAGEMENT POLICY (OPMP)**

The Office of Pest Management Policy promoted grower interests in pesticide regulatory and oversight activities of Federal agencies. For example, in 2025:

**PESTICIDE RISK ASSESSMENT AND REGULATORY ANALYSIS**

- OPMP reviewed all of the Environmental Protection Agency's (EPA) significant pesticide

regulatory actions with agricultural applications, to assist EPA in making informed decisions for pesticides critical to agriculture and reduce the cost to growers. OPMP submitted comments and information on many of these actions to ensure representation and awareness of key grower needs. OPMP's contributions have made risk assessments more reflective of real-world conditions and in multiple cases, have changed regulatory outcomes to reduce mitigations and grower burdens.

- Also represented grower interests in other ways. For example, OPMP also actively participated in the Pesticide Program Dialogue Committee (a Federal Advisory Committee), and subgroups of that committee, that formally advises EPA's pesticide program.

### **AGRICULTURAL BIOTECHNOLOGY**

- The Biotechnology Coordinator supported biotechnology and new application technology efforts within USDA and the federal government. As part of these efforts, the Biotechnology Coordinator ensured that the perspectives of U.S. farmers and the U.S. agricultural system were appropriately considered.
- The Biotechnology Coordinator led ongoing USDA Biotechnology Coordinating Group meetings, resulting in rapid dissemination of information to group members, improved coordination of biotechnology policy across the Department, and harmonized messaging.
- The Biotechnology Coordinator continued to lead USDA's coordination with FDA animal biotech regulations and guidance. These efforts ensured FDA's continued formal recognition of USDA's animal health, food safety, and labeling roles; a commitment to timely and routine information sharing for USDA awareness of FDA actions; and an agreement on appropriate language to convey the safety of animal biotechnology products. Importantly, USDA and FDA worked together to ensure smooth rollout and no trade disruptions following FDA's regulatory decision for a first-ever, viral-disease resistant line of pigs that could protect against \$1 billion in losses to the U.S. pork industry annually if adopted.
- The Biotechnology Coordinator played a key role in shepherding genetically engineered male-only sterile screwworms developed by USDA ARS through the EPA regulatory process. If deployed this product would protect American cattle production and other livestock and game industries, saving producers nearly \$100 million per year in losses and with an estimated \$2.8 billion impact on the broader economy. This work included engaging with partners to facilitate the development of a clear regulatory strategy, ensuring that all relevant groups across the Department are informed of activities and next steps, and authoring and clearing significant sections of the EPA regulatory application, together with ARS.
- The Biotechnology Coordinator facilitated departmental contributions to the U.S.-Mexico-Canada Agreement corn dispute, resulting in the U.S. prevailing against Mexico and preserving our largest corn export market, worth over five billion dollars in 2024.

### **FEDERAL LEADERSHIP IN PESTICIDES AND INTEGRATED PEST MANAGEMENT (IPM)**

- Promoted IPM strategies by leading a group of Federal partners who work in Integrated Pest Management (currently the Federal IPM Coordinating Committee (FIPMCC)). Maintained IPM and FIPMCC webpages that house the National Roadmap for IPM.
- Worked closely with Regional IPM Centers to prioritize Pest Management Strategic Plans for specialty crops.

### **FEDERAL LEADERSHIP IN PESTICIDES AND THE ENDANGERED SPECIES ACT (ESA)**

- Consulted agricultural producers to ensure informed in conversations with EPA, the National Marine Fisheries Service, and the Fish and Wildlife Service (FWS) as part of the FIFRA-Endangered Species Act (ESA) Interagency Working Group. Ensured the needs of farmers and ranchers were accurately represented, heard, and reflected in active consultations and EPA's published strategies to address the need for pesticide regulatory decisions to comply with the Endangered Species Act. Continued to provide early feedback and comments on EPA's strategies to comply with ESA, emphasizing the need to design practical and clear/simple strategies for growers in the interest of ease of compliance while still protecting

endangered species. OPMP's initiative directly influenced EPA's final Insecticide Strategy, significantly improving outcomes for U.S. growers and other agricultural stakeholders.

- OPMP consulted agricultural producers and provided comments on the 2024 FWS proposed listing of the monarch butterfly under ESA. The FWS listing decision remains pending.