



United States Department of Agriculture

USDA's 94th Annual Agricultural Outlook Forum



THE ROOTS OF PROSPERITY

February 22-23, 2018
Crystal Gateway Marriott Hotel
Arlington, Virginia

www.usda.gov/oce/forum

2018 Welcome for USDA's 94th Annual Agricultural Outlook Forum

As we look forward to the spring and another growing season we are also looking more broadly at rural America and nurturing “The Roots of Prosperity” for all. We have many challenges but also many opportunities to consider as the country’s agricultural journey presses on. When thinking ahead, support of the next generation of farmers and

agricultural professionals will be critical. We are going to count on these folks to continue the amazing story of U.S. farm productivity through the coming decades, bringing new technology and practices throughout the sector and continuing to show the world that the United States is a reliable and open supplier of high-quality food, feed, fiber, and fuel to the world.

“THE ROOTS OF PROSPERITY”

This year, USDA’s annual Agricultural Outlook Forum focuses on establishing and expanding prosperity. The morning plenary program kicks off with speakers who have and will continue to play important roles in the agriculture sector and speak to the opportunities and challenges facing the sector. Agriculture Secretary Sonny Perdue and Deputy Secretary Steve Censky will provide the keynote address and welcome, respectively. USDA Chief Economist Robert Johansson will present “The 2018 Economic Outlook for Agriculture.” The distinguished speaker is Dr. Akinwumi Adesina, President of the African Development Bank Group and current World Food Prize laureate. Mehmood Khan, Vice Chairman and Chief Scientific Officer for PepsiCo, one of America’s iconic retail brands, will be our dinner speaker.



Dr. Seth Meyer
Program Chair

The plenary session features speakers who are agriculture industry professionals involved in production, finance, marketing, input supplies, and trade, as well as representation from State government. The prominent group includes James C. Collins, Jr., Chief Operating Officer, Agriculture Division from DowDuPont; Celia Gould, Director, Idaho State Department of Agriculture; Bill Lovette, President and Chief Executive Officer, Pilgrim’s; and Joe Stone, Senior Vice President, Cargill, Inc. Additionally, we have 30 concurrent track sessions supporting the Forum theme and an inviting display of agricultural and related exhibits. 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

In 2007, USDA’s Agricultural Outlook Forum launched the Student Diversity Program. The participants major in agriculture-related studies, including business, economics, communications, nutrition, food science, and veterinary studies. Finalists are selected from land-grant universities, Hispanic-serving institutions, and non-land-grant colleges of agriculture. The Program is supported by academic and government institutions and corporations dedicated to promoting the education of the next generation of agriculturalists. This year’s sponsoring organizations include the University of Maryland Eastern Shore and Farm Credit. USDA sponsors include the Agricultural Research Service, Animal and Plant Health Inspection Service, Economic Research Service, National Agricultural Statistics Service, Natural Resources Conservation Service, Office of Advocacy and Outreach, and the Office of the Chief Economist.

Former winners have said the Agricultural Outlook 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 Program participants who are full-time employees of the Department.

For Forum coverage, follow @USDA and #AgOutlook



United States Department of Agriculture

**USDA's
94th
Annual**

Agricultural Outlook Forum

THE ROOTS OF PROSPERITY

February 22-23, 2018 • Crystal Gateway Marriott Hotel, Arlington, Virginia

Agriculture Flourishes



Keynote Address

Sonny Perdue
Secretary, USDA



Distinguished Speaker

Akinwumi Adesina
*President
African Development Bank Group*



Welcome

Steve Censky
Deputy Secretary, USDA



**2018 Agricultural
Economic & Foreign
Trade Outlook**

Robert Johansson
Chief Economist, USDA

Plenary with Agricultural Industry Leaders



James C.
Collins, Jr.
*Chief Operating
Officer
Agriculture Division
DowDuPont*



Celia Gould
*Director
Idaho State
Department of
Agriculture*



Bill Lovette
*Chief Executive
Officer &
President
Pilgrim's*



Joe Stone
*Corporate Vice
President &
Director
Cargill*

Dinner Speaker



Mehmood Khan
*Vice Chairman &
Chief Scientific Officer
PepsiCo*

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

You Are Invited To Attend:

Thursday, February 22

Morning Coffee	Grand Ballroom Foyer <i>8:40 a.m.</i>
Networking Luncheon	Salons A, B, C, D, E & Sky View <i>12:30 p.m.</i>
Reception	Exhibit Hall Salons F, G & H <i>5:30 p.m.</i>
AOF Dinner	Salons III & IV <i>6:30 p.m.</i>

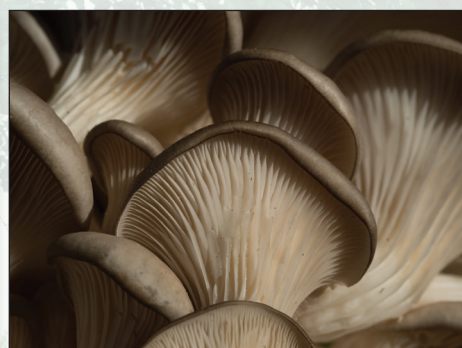
Friday, February 23

Luncheons • Cotton & Fibers • Sugar & Sweeteners • New Food Retailing • Grains & Oilseeds • Livestock & Poultry	1:15 p.m. – 2:30 p.m. - Salons J & K - Salons C, D & E - Salons A & B - Salons III & IV - Salons V & VI
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On the USDA 2018 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 22
- **Commodity Outlooks:** Posted at 7 a.m. Friday, February 23
- **Speaker Presentations:** Posted by 4 p.m. Monday, February 26

See, share, and download photos at <https://www.flickr.com/gp/usdagov/1Nr124>



THE ROOTS OF PROSPERITY

Thursday, February 22

7:00 a.m.	Registration (Wednesday Evening Early Onsite Registration 5-7 p.m.)				
8:00 a.m.	Welcome – Deputy Secretary Steve Censky				
8:10 a.m.	Keynote Address – Secretary of Agriculture Sonny Perdue				
8:40 a.m.	Coffee Break				
9:00 a.m.	2018 Agricultural Economic & Foreign Trade Outlook – Chief Economist Robert Johansson				
9:30 a.m.	Distinguished Speaker – African Development Bank Group President and World Food Prize Recipient Dr. Akinwumi A. Adesina				
10:00 a.m.	Coffee Break & Exhibit Hall Opens				
10:20 a.m.	Plenary Speakers				
12:30 p.m.	Networking Luncheon				
Concurrent Sessions					
1:45 p.m.	Food Price & Farm Income Outlooks	International Markets & Trade	Innovation in Agriculture	Encouraging Rural Prosperity	Ag Production & Rural Opportunities
	Food Price Outlook Salon IV	Brazil: Now to 2040 Salon III	Building Tomorrow's Agriculture Salon V & VI	The Importance of E-Connectivity Salon I & II	Beginning Farmers and Ranchers Salon J & K
3:15 p.m.	30 Minute Break				
3:45 p.m.	Farm Income Outlook Salon IV	Emerging Markets in Developing Regions Salon III	Livestock Reproduction Meets Modern Technology Salon J & K	Rural America and the Opioid Crisis Salon I & II	Outlook for Organic Agriculture Salon V & VI
5:30 p.m.	Cash Bar Reception				
6:30 p.m.	Forum Dinner Speaker – PepsiCo Vice Chairman & Chief Scientific Officer Mehmood Khan				

Friday, February 23

7:00 a.m.	Registration				
7:30 a.m.	Exhibit Hall Opens				
8:00 a.m.	Morning Meeting on Priorities for Trade, Regulations, and Rural America				
8:30 a.m.	Coffee Break				
Concurrent Sessions					
9:15 a.m.	Rural & Urban America Support	Food Safety	Ag Policies Here & Abroad	Commodity Outlooks	Commodity Outlooks
	Protecting Agricultural Producers From Hurricanes Salon A & B	Animal Disease Outbreak Preparedness Salon V & VI	China's Evolving Markets and Policies Salon III & IV	Grains and Oilseeds Outlook Salon J & K	Sugar Outlook Salon I & II
10:45 a.m.	Break				
11:00 a.m.	Restoring America's Watersheds Salon A & B	Emerging Issues in Food Safety Salon V & VI	Crop Insurance in the U.S. and Abroad Salon III & IV	Cotton Outlook Salon J & K	Livestock and Poultry Outlook Salon I & II
12:30 p.m.	Visit Exhibit Hall				
Luncheons					
1:15 p.m.	Cotton and Fibers Salon J & K	Sugar and Sweeteners Salon C,D & E	New Food Retailing Salon A & B	Grains and Oilseeds Salon III & IV	Livestock and Poultry Salon V & VI
2:30 p.m.	Break				
Concurrent Sessions					
3:00 p.m.	Water Quality	Commodity Outlook	Food Safety	Adjusting to Lower Commodity Prices	Rules and Regulation
	Water Quality and Edge-of-Field Conservation Salon J & K	Dairy Outlook Salon A & B	Food Safety: Arming Consumers Salon III	Consolidation in Agriculture Salon V & VI	Right-Sizing Regulation Salon I & II
4:30 p.m.	Adjourn				

THE ROOTS OF PROSPERITY



Thursday, February 22, 2018

1:45pm – 3:15pm

TRACK: FOOD PRICE AND FARM INCOME OUTLOOKS

Food Price Outlook

Salon IV

The Food Price Outlook provides timely, relevant, and detailed data and analysis of current and forecasted trends in retail and wholesale food markets and is the only source of Federal retail food price inflation projections.

Moderator: Tim Park, Branch Chief, USDA, Economic Research Service, Washington, DC

Food Price Outlook

Setting the stage and presenting background on the retail food price inflation and the Department of Agriculture's 2018 projections. Annemarie Kuhns, Economist, USDA, Economic Research Service, Washington, DC

Challenges and Opportunities in the Face of Lower Growth Rates

How the retail food industry deals with lower rates of growth and the strategies employed to reduce price impacts. Brian Todd, President, The Food Institute, Upper Saddle River, NJ

Economic Outlook For the Food Service Industry

The perspective of how food price inflation impacts the food service industry. Bill Lapp, President, Advanced Economic Solutions, Omaha, NE

TRACK: INTERNATIONAL MARKETS AND TRADE

Brazil: Now to 2040

Salon III

A long-term outlook for how changes in Brazil's agricultural potential, food distribution systems, and infrastructure will impact U.S. exports and global markets.

Moderator: Clay Hamilton, Minister Counselor, American Embassy, USDA, Office of Agricultural Affairs, Brasília, Brazil

A Brazilian Producer's Perspective

A focus on technology, environmental issues, farm practices and land management from a producer bird's-eye view. Roberto Rodrigues, Brazilian Producer and Coordinator, Getulio Vargas Foundation Agribusiness Center, São Paulo, Brazil

Infrastructure Improvements and Constraints

A look at the infrastructure situation in Brazil and how new developments could impact U.S. agricultural exports and global markets.

Daniel Furlan Amaral, Chief Economist, Abiove, São Paulo, Brazil

Agricultural Production Potential in Brazil—Implications for U.S. Agriculture and Trade

The range of factors influencing Brazil's agricultural production potential.

Luis Ribera, Associate Professor and Extension Economist, Texas A & M University, College Station, Texas

TRACK: INNOVATION IN AGRICULTURE

Building Tomorrow's Agriculture

Salons V and VI

Breeding improved crops and livestock to increase production, resist disease, and tailor agriculture to production and societal needs can be a lengthy and imprecise process. Newly emerging gene editing technologies promise safe, rapid, and focused improvement. The session examines gene editing, its potentials for agriculture, and the policy implications for its use.

Moderator: Chavonda Jacobs-Young, Administrator, Acting Deputy Under Secretary for Research, Education, and Economics and Acting Chief Scientist, USDA, Agricultural Research Service, Washington, DC

From Landraces to Edited Genomes: The Next Big Boost for Agriculture

Agriculture has moved from improved crops and livestock through farmer selection, then selective breeding, and now the promise of precise genetic editing.

Ann Blechl, Supervisory Research Geneticist, USDA, Agricultural Research Service, Albany, CA

The Next Generation of Plants

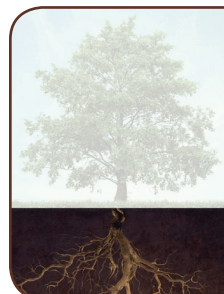
Industry's development and use of technology to produce new products and the seed industry's position on regulating innovation in plant breeding.

Bernice Slutsky, Senior Vice President, International and Domestic Policy, American Seed Trade Association, Alexandria, VA

The Global Landscape of Regulatory Policy

Regulatory and trade policy will be discussed as well as the potential impact on trade.

Paul Spencer, Director, USDA, Foreign Agricultural Service, Washington, DC



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

Thursday, February 22, 2018 (continued)

TRACK: ENCOURAGING RURAL PROSPERITY

The Importance of E-Connectivity

Salons I and II

Reliable and affordable high-speed internet e-connectivity can transform rural communities, overcome time and distance barriers, provide critical services access, enable increased productivity, and create new economic opportunities. The session addresses obstacles to expanding access, improving public-private partnerships, and other changes needed to facilitate broadband buildout in rural areas.

Moderator: Jannine Miller, Senior Advisor, Office of the Secretary, USDA, Rural Development, Washington, DC

Broadband and the Rural Community Outlook

The impact of high-speed broadband on economic and socio-economic growth in Rural America.

Peter Stenberg, Economist, USDA, Economic Research Service, Washington, DC

Battling Obstacles and Creating Opportunities for Rural Broadband Deployment

Deploying rural broadband requires investment and addressing challenges. Private companies can play a role.

Shirley Bloomfield, Chief Executive Officer, NTCA-The Rural Broadband Association, Arlington, VA

Finding Solutions to Expanding Rural Broadband: Look to Rural Cooperative Utilities

Rural areas lag behind their urban counterparts in access to broadband due to the cost of deployment. Rural electric co-ops may be part of the broadband solution.

Bob Hance, President and Chief Executive Officer, Midwest Energy and Communications, Cassopolis, MI



TRACK: AGRICULTURAL PRODUCTION AND RURAL OPPORTUNITIES

Beginning Farmers and Ranchers

Salons J and K

Exploring new perspectives on recruiting and smoothly transitioning new and beginning farmers and ranchers to agricultural production, including growth and changes in rural America, markets, and specific challenges and opportunities that new and beginning farmers face, including land and financing pressures.

Moderator: Doug Nohe, USDA Program Lead, The SCORE Association, Chicago, IL

Business Innovators

Changing consumer demands while driving critical market access for new farmers and creating opportunities for partnerships in regional supply chains.

Michael "Mike" Beal, Vice President, Secretary and Chief Operating Officer, Ball's Food Stores, Kansas City, KS

The Need for Strategic Creation of Infrastructure To Access Markets

Assistance from food hubs, cooperatives, and rural business leaders is essential for beginning farmer and rancher success.

Sarah Lloyd, Special Projects Coordinator and Secretary of the Board and Director of Development, Wisconsin Farmers Union/Wisconsin Food Hub Cooperative, Chippewa Falls, WI

Rural Agricultural Roots

The perspective of an extension professional with deep roots in agriculture.

Jason Schoch, Native American Beginning Farmer Rancher Program Manager and Tribal Local Foods Extension Associate, South Dakota State University Extension, Pine Ridge Reservation, SD

3:45pm – 5:15pm

TRACK: FOOD PRICE AND FARM INCOME OUTLOOKS

Farm Income Outlook

Salon IV

An outlook on sector income and household income and discussion on how land value changes impact farm profitability. Also a look at how tax policy interacts with farm incomes.

Moderator: Jeffrey Hopkins, Chief, Farm Income Branch, USDA, Economic Research Service, Washington, DC

USDA 2018 Farm Sector Income and Household Income Forecast

Presentation on the Farm Sector Income forecast.

Carrie Litkowski, Economist, USDA, Economic Research Service, Washington, DC

Midwest Cash Rents and Land Values

Perspective of an assistant professor and extension economist at Iowa State University who has run the land values survey since 2015. This land value survey began in 1941.

Wendong Zhang, Extension Economist, Iowa State University, Ames, IA

Continued on next page

Thursday, February 22, 2018 (continued)

Balance Sheet Outlook: Strong but Detonating Financial Positions of Farms

A discussion on the balance sheet of farm operators, machinery markets, and working capital.

Gary Schnitkey, Extension Economist, University of Illinois, Urbana, IL

TRACK: INTERNATIONAL MARKETS AND TRADE

Emerging Markets in Developing Regions

Salon III

Growing incomes lead to expanding food demand in SubSaharan Africa and Southeast Asia. With a combined population of almost 2 billion, these regions have a growing presence in global agricultural markets and are emerging markets for U.S. agriculture. Dialogue on demand-side changes, developing value chains, and the role of technology, discusses competition and challenges in the region.

Moderator: *Greg Pompelli, Associate Administrator, USDA, Economic Research Service, Washington, DC*

Rapid Transformation of Emerging Market Food Systems: Implications for U.S. Exporters

Perspectives on changing food systems, following how the diet transition to processed food spans demand side changes and developments along value chain structures.

Thomas Reardon, Professor and Distinguished Faculty, Michigan State University, Lansing, MI

Strengthening Value Chains To Promote Trade

Strengthening value chains through development, how capacity building creates opportunities on the ground, and challenges to accessing local markets.

Josh Neiderman, Regional Director-Africa, American Soybean Association/World Initiative for Soy in Human Health, St. Louis, MO

Expanding Agriculture Technology and Innovation in Emerging Markets

Historical perspective on how technology and trade change together, linkages between productivity and ability to purchase imported commodities, and implications for the United States.

Steven Elmore, Chief Economist, Pioneer Seeds, Denver, PA

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



TRACK: INNOVATION IN AGRICULTURE

Livestock Reproduction Meets Modern Technology

Salons J and K

In order to feed a burgeoning population while overcoming the challenges associated with climate, disease and numerous other factors can limit animal productivity. This session highlights the impact that modern reproductive technologies have on overcoming these challenges and the positive impacts USDA-funded work is having on the beef industry.

Moderator: *Robert Godfrey, Director of Agricultural Experiment Station, University of Virgin Islands, Kingshill, Virgin Islands*

Contemporary Science Boosts Fertility in Cattle

The impacts of research, education, and extension on increasing the reproductive performance of livestock.

Thomas (Tod) Hansen, Traubert Professor, Animal Reproduction Biotech Lab Director, Colorado State University, Fort Collins, CO

The Partnership Between Land Grant Universities and NIFA Assists the Livestock Industry

The importance of the partnership and interaction between USDA and the science community in solving reproductive challenges.

Mark Mirando, National Program Leader, USDA, National Institute of Food and Agriculture, Washington, DC

Reproductive Technology and the Beef Industry's Long Range Plan

Beef productivity is dependent on reproductive success. A first-hand perspective reveals the impact of modern science on beef cattle production.

Coleman Locke, President, J.D. Hudgins, Inc., Hungerford, TX

Thursday, February 22, 2018 (continued)

TRACK: ENCOURAGING RURAL PROSPERITY

Rural America and the Opioid Crisis: Dimension, Impact, and Response

Salons I and II

The Nation's opioid crisis affects the ability of rural communities to build sustainable economies and improve the quality of life for rural residents. The session looks at the economic impact drug misuse has on rural areas, including costs of health care and emergency services. It also covers efforts to address the devastating impact of opioids in rural areas.

Moderator: Anne Hazlett, Assistant to the Secretary for Rural Development, USDA, Rural Development, Washington, DC

Overview of the Opioid Crises

Overview of the latest activity in fighting opioid battles and the economic toll on rural communities.

Mace Thornton, Executive Director, Communications, American Farm Bureau Federation, Washington, DC

Impact of Opioids on Rural Communities

Communities suffer from the growing use of opioids as the impact takes its toll on the workforce and families.

Andrew Jerome, Communications Director, National Farmers Union, Washington, DC

Successful Community Solutions to Opioid Use

A discussion of the impact of opioid misuse on the rural workforce.

Dan Krouse, General Manager, Midwest Poultry Services, L.P., Mentone, IN

Opioid treatment is one tool toward finding a solution to the opioid crisis, but more work is needed.

Jessica Nickel, President and Chief Executive Officer, Addiction Policy Forum, Washington, DC

A Kentucky Perspective on Opioids

Eastern Kentucky perspective on the impact of the crisis and an overview of Operation UNITE.

Nancy Hale, President and CEO, Operation UNITE, London, KY

TRACK: AG PRODUCTION AND RURAL OPPORTUNITIES

Outlook for Organic Agriculture

Salons V and VI

According to recent USDA analysis, the market share of organic food sales in the United States continues to grow for most food sectors, reaching 14 percent of total milk sales in 2014, and nearly 7 percent of total egg and vegetable sales. Speakers examine the rise in U.S. organic food demand, organic export markets, and organic production-sector opportunities.

Moderator: Jessica Shade, Director of Science Programs, The Organic Center, Washington, DC

Outlook for U.S. Organic Agriculture

A market outlook for the U.S. organic sector similar to those presented for conventional commodity groups.

Catherine Greene, Senior Agricultural Economist, USDA, Economic Research Service, Washington, DC

Meeting Consumer Demand for Organic Fruits and Vegetables

An examination of consumer and industry trends and discussion of the developments in the organic fruit and vegetable sector that reflect these trends.

David Lively, Vice President of Sales and Marketing, Organically Grown Company, Eugene, OR

Expanding the U.S. Organic Grain Sector—Challenges and Opportunities

How to address emerging solutions to U.S. production challenges in key organic sectors where U.S. demand exceeds the domestic supply.

Peter Goldbitz, Founder and Director, Agromeris, Estero, FL

6:30 p.m.

Salons III & IV DINNER SPEAKER



Mehmood Khan
Vice Chairman &
Chief Scientific Officer
PepsiCo

2018 Student Diversity
Program Sponsor



Continued on next page



Friday, February 23, 2018

9:15am – 10:45am

TRACK: RURAL AND URBAN AMERICA SUPPORT

**Protecting Agricultural Producers From Hurricanes
Salons A and B**

An expert panel will explore how Federal and State governments are assisting agricultural producers impacted by 2017's three back-to-back major hurricanes, Harvey, Irma, and Maria.

Moderator: Josh Bornstein, Deputy Director of the Office of Homeland Security, USDA, Departmental Management, Washington, DC

The State of Florida's Agricultural Damage Assessment From Hurricane Irma

An outline of how Florida's Department of Agriculture responded to one of the most powerful hurricanes to hit the State and the quick assessment of its damage.

Sergio Alvarez, Chief Economist, Florida Dept. of Agriculture and Consumer Services, Tallahassee, FL

USDA's Farm Safety Net for Hurricane Damage

How USDA's Farm Safety Net responds to hurricanes with disaster assistance programs and crop insurance.

Stephen Peterson, Acting Administrator, USDA, Foreign Agricultural Service, Washington, DC

The Latest Approaches to Weather-Related Agricultural Disasters

A historical perspective of government agricultural disaster management as well as an outline of some lessons learned.

Keith Coble, The W.L. Giles Distinguished Professor of Agricultural Economics, Mississippi State University, Mississippi State, MS

TRACK: FOOD SAFETY

**Animal Disease Outbreak Preparedness
Salons V and VI**

U.S. livestock operations and related food industries are vulnerable to both inadvertent and intentional introductions of animal diseases. The discussion is on the factors affecting these changing vulnerabilities, ways that USDA coordinates with other agencies and the private sector to reduce risks and respond to crises, and the role and challenges of international preparedness and response.

Moderator: Kevin Shea, Administrator, USDA, Animal and Plant Health Inspection Service, Washington, DC

Preventing and Responding to Animal Disease Outbreaks

USDA's coordination with other agencies and the private sector to reduce the risks of animal disease outbreaks, critical decisions, and actions when there is an emergency.

Jack Shere, Deputy Administrator, Veterinary Services, USDA, Animal and Plant Health Inspection Service, Washington, DC

Role of Industry in Addressing Animal Disease Risks

Strategies and activities of the livestock and meat industries to prepare for and respond to animal disease risks in concert with USDA and international partners.

Michael Skahill, Vice President, Government Affairs, Smithfield Foods, Washington, DC

Preparing Internationally for Animal Disease Outbreaks

A look at the economic and public health significance of preparing internationally for animal disease outbreaks, and the challenges to multi-nation collaboration and response.

Speaker: Dominique Burgeon, Director, Emergency and Rehabilitation Division, Strategic Programme Leader—Resilience, Food and Agriculture Organization of the United Nations (FAO) Rome, Italy

TRACK: AGRICULTURAL POLICES HERE AND ABROAD

**China's Evolving Markets and Policies
Salons III and IV**

China's evolving trade strategy, constraints to production, and challenges and opportunities for U.S. exports.

Moderator: Jason Hafemeister, Trade Counsel to the Secretary, USDA, Office of the Secretary, Washington, DC

China's Evolving Trade Strategy

China's "One Belt One Road" trade and investment strategy as it relates to agriculture from a business standpoint.

Erin Ennis, Vice President, U.S.-China Business Council, Washington, DC

U.S. Exports: Challenges

China's efforts to tighten food standards and how USDA is there to help exporters navigate successfully through these hurdles.

Michael Ward, Senior Agricultural Attaché, USDA, Foreign Agricultural Service, American Embassy, Beijing, China

Partnering With China

China's environmental crackdown, its impact on U.S. export potential, and what is being done about it by an industry that is partnering with China.

William Westman, Senior Vice President, North American Meat Institute, Washington, DC

TRACK: COMMODITY OUTLOOKS

**Grains and Oilseeds Outlook
Salons J and K**

A comprehensive global outlook and projections for the world market in 2018 and beyond.

Moderator: Richard Feltes, Vice President of Research, R.J. O'Brien, Chicago, IL

Northern Hemisphere Weather Outlook

A review of Northern Hemisphere weather ahead of spring planting.

Mark Brusberg, Chief Meteorologist, USDA, World Agricultural Outlook Board, Washington, DC

Friday, February 23, 2018 (continued)

2018/19 Outlook for U.S. Wheat, Corn, and Soybeans

A look at the coming year's U.S. wheat, corn, and soybean crops.

Joanna Hitchner, Economist, USDA, World Agricultural Outlook Board, Washington, DC

Brazil Corn Trade: Prospects for Growth

With Brazil's corn production and exports increasing in recent years on expanding second crop production, competition in global corn trade is likely to increase.

Andre Pessoa, President, CEO, Agroconsult, Incorporated, Florianopolis, Brazil

TRACK: COMMODITY OUTLOOKS

Sugar Outlook

Salons I and II

A comprehensive global outlook and projections for the world market in 2018 and beyond. Specialized attention is given to sugar developments in Mexico and Brazil.

Moderator: *Teresa McKeivier, Branch Chief, Sugar and Dairy Import Programs, USDA, Foreign Agricultural Service, Washington, DC*

The Global View

The view for the global market from Czarnikow, one of the world's premier sugar and ethanol trading, advisory, and supply chain management firms.

Benjamin Fessler, Market Analyst, C. Czarnikow Sugar Inc., Miami, FL

Mexico Sugar Outlook and Future Under Revised Suspension Agreements

Implications of the Suspension Agreement for the Mexico sugar industry are presented from the perspective of one of the largest sugarcane processors in Mexico.

Christophe Armero, Director International Business and Strategy, Beta San Miguel, Mexico DF, Mexico

UNICA's View on Prospects for Brazilian Sugar in 2018/19

Important agro-economic and policy developments affecting projections for sugar and ethanol are analyzed from the Brazilian Sugarcane Industry Association perspective.

Leticia Phillips, Representative—North America, Brazilian Sugarcane Industry Association - UNICA, Washington, DC

11:00am – 12:30pm

TRACK: RURAL AND URBAN AMERICA SUPPORT

Restoring America's Watersheds: Innovation in Public-Private Partnerships

Salons A and B

The USDA Forest Service and Coca-Cola's ground-breaking partnership achieved an ambitious milestone and is on track to double that commitment by 2018. Restoration of damaged watersheds and meadowlands returned more than a billion liters of water to the National Forest System, which provides drinking water to more than 60 million Americans.

Moderator: *Leslie Weldon, Forest Service Deputy Chief—National Forest Systems, USDA, Forest Service, Washington, DC*

Coca-Cola Billion Liter Replenishment Project

Coca-Cola has invested more than \$2.1 million to date. This has been matched by partners including the National Forest Foundation for a total investment of \$4.5 million.

Jon Radtke, Chief Hydrologist for North America, The Coca-Cola Company, Atlanta, GA

What Does Replenishment Look Like on the Ground?

The National Forest Foundation describes what is included in the more than 1,200 acres of land restored (809 acres of wetland restoration and 437 acres of invasives removal).

Ray Foote, Executive Vice President, National Forest Foundation, Alexandria, VA

Opportunities and Limitations Around Public-Private Watershed Restoration Projects

Water replenishment achieved through a clear science-based vision that encourages a diverse variety of stakeholders with common interests to accomplish desired goals.

Suzanne Ozment, Associate, Natural Infrastructure for Water, World Resources Institute, Washington, DC

TRACK: FOOD SAFETY

Emerging Issues In Food Safety

Salons V and VI

Food safety policy is in the midst of a policy reform that hasn't been seen since the late 1950s. A new model has emerged for organizing industry and consumer interests to push for reform. The Food Safety Modernization Act of 2010 is being implemented. FSIS is working with industry to continue to modernize meat inspection. The Environmental Protection Agency's REACH has influenced pesticide programs.

Moderator: *Mary Bohman, Administrator, USDA, Economic Research Service, Washington, DC*

FSMA: Building Bridges to Success

Major developments and progress in the Food Safety Modernization Act implementation.

Erik Mettler, Associate Commissioner for Foods and Veterinary Medicine, U.S. Food and Drug Administration, Silver Spring, MD

Forward Progress: Data-Driven Modernization Initiatives

Major developments in USDA's Food Safety and Inspection Service efforts to modernize meat inspection.

Carmen Rottenberg, Acting Deputy Under Secretary for Food Safety, USDA, Food Safety and Inspection Service, Washington, DC

Managing Food Safety Modernization: The Produce Industry Perspective

Work of an industry consumer group and coalition on food safety reform that pushed adoption of FSMA and is now working for a major legislative reform of meat inspection.

Dr. Jennifer McEntire, VP, Food Safety & Technology, Produce Marketing Association, Produce Market Association, Washington, DC

Continued on next page

TRACK: AGRICULTURAL POLICIES HERE AND ABROAD

Crop Insurance in the United States and Abroad

Salons III and IV

For many agricultural producers in the United States, Federal crop insurance is the foundation of a successful risk management plan. As a result of the 2014 Farm Bill, Federal crop insurance has introduced new features and options to provide for more effective risk management protection. Crop insurance outside of the United States is growing too, playing a larger role in the development of farm policy.

Moderator: Thomas Zacharias, President, National Crop Insurance Services, Overland Park, KS

Federal Crop Insurance Following the 2014 Farm Bill

Update on changes to the Federal Crop Insurance Program resulting from Title XI of the 2014 Farm Bill.

Kent Lanclos, Director, USDA, Risk Management Agency, Washington, DC

Crop Insurance: A Producer Perspective

The role and importance of crop insurance for risk management in production agriculture.

Chalmers Carr III, President and Chief Executive Officer, Titan Farms, Ridge Spring, SC

The International Market for Agricultural Insurance

Issues, challenges, and approaches to agricultural insurance in the international arena.

Lysa Porth, Assistant Professor, Chair Ag Risk Management and Insurance, University of Manitoba, Winnipeg, Manitoba, Canada

TRACK: COMMODITY OUTLOOKS

Cotton Outlook

Salons J and K

Includes USDA's preliminary supply-and-demand outlook for the 2018/19 marketing year, a report on the impact on Indian cotton production of bollworm resistance to Bt-cotton, and a presentation on the outlook for U.S. and international cotton policy.

Moderator: Carol Skelly, Fibers Analyst, USDA, World Agricultural Outlook Board (Retired), Arlington, VA

The World and U.S. Cotton Outlook for 2018/19

USDA's first projections of U.S. and world cotton supply and demand for the next marketing year are presented.

Stephen MacDonald, Fibers Analyst, Interagency Commodity Estimates Committee Chair, USDA, World Agricultural Outlook Board, Washington, DC

Pink Bollworm Menace on Bt-Cotton In India: Critical Insights and Way Forward

Technology helped raise India's cotton yields and production, but growing bollworm resistance to Bt-cotton poses new challenges.

Keshav Kranthi, Head, Technical Information Section, International Cotton Advisory Committee, Washington, DC

U.S. and International Cotton Policy and Outlook

Developments in legislation in the United States affecting cotton and policies in China, India, and other major countries evolving in response to global economic change.

Darren Hudson, Director, International Center for Agricultural Competitiveness, Texas Tech University, Lubbock, TX

TRACK: COMMODITY OUTLOOKS

Livestock and Poultry Outlook

Salons I and II

A comprehensive global outlook and projections for the world market in 2018 and beyond.

Moderator: Joel Greene, Analyst in Agricultural Policy, Congressional Research Service, Washington, DC

Outlook for U.S. Livestock and Poultry

A forward glance at the 2018 U.S. livestock and poultry markets.

Seanicaa Herron, Livestock Analyst, USDA, World Agricultural Outlook Board, Washington, DC

It Looks OK, But Can You Really Eat That?

What does the rise of alternative proteins mean for the meat industry.

Gilles Boumeester, Global Head of RaboResearch Food & Agribusiness, Rabobank, Utrecht, The Netherlands

The Dilemma of Alternative Proteins

Issues and concerns in regulating and labeling alternative protein products.

Tiffany Lee, Director, Scientific & Regulatory Affairs, North American Meat Institute, Washington, DC

1:15pm – 2:30pm

TRACK: LUNCHEONS

Cotton and Fibers

Salons J and K

Moderator: Darryl Earnest, Deputy Administrator, Cotton and Tobacco Program, USDA, Agricultural Marketing Service, Memphis, TN

Global Shifts: Governing Cotton in Historical Perspective

Examining parallel negotiations over quality standards for cotton between the U.S. and Britain at the turn of the 20th century and decades later between the U.S. and China.

Amy Quark, Associate Professor, College of William & Mary, Williamsburg, VA



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Friday, February 23, 2018 (continued)

TRACK: LUNCHEONS

Sugar and Sweeteners

Salons C, D, and E

Moderator: Barbara Fecso, U.S. Sugar Program Director, USDA, Farm Service Agency, Washington, DC

The Next Decade: Stability

Have the Suspension Agreements with Mexico established stability? What about a new Farm Bill? What is in store for the U.S. sugarcane refining industry?

Mike Gorrell, President and CEO, Imperial Sugar Company, Port Wentworth, GA



TRACK: LUNCHEONS

New Food Retailing

Salons A and B

Moderator: Arthur Neal, Deputy Administrator, USDA, Agricultural Marketing Service, Washington, DC

Back to the Future: How the Future of Retail May Look More Like the Past

Some truths about transformation in the retail food sector and why the entire food system is operating on razor-thin margins. Where are the opportunities for “found” money?

Patrick Bultema, Co-Founder, Chairman and CEO, FoodMaven, Colorado Springs, CO



TRACK: LUNCHEONS

Grains and Oilseeds

Salons II and IV

Moderator: Greg Pompelli, Associate Administrator, USDA, Economic Research Service, Washington, DC

Impact of Fund Investment Activity on Commodity Futures Prices

A look at commodity futures prices.
Lonn Taffel, Senior Vice President, ABN AMRO Clearing, Chicago, IL



TRACK: LUNCHEONS

Livestock and Poultry

Salons V and VI

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

Meat and Technology: An Industry Collision

Looking at reasons smart companies in the meat and poultry industry will position themselves differently to ride new waves of innovation.

Janette Barnard, Sales & Marketing Director, DecisionNext, San Francisco, CA



3:00pm – 4:30pm

TRACK: WATER QUALITY

Water Quality and Edge-of-Field Conservation Systems

Salons J and K

Five watersheds contribute 25 percent of the total nitrate and phosphorus to the Mississippi River Basin. The Hypoxic Zone continues despite tillage and nutrient reduction efforts. The conservation focus in targeted areas is to enhance conservation efforts with edge-of-field conservation systems. This session examines the state-of-the-art and current efforts.

Moderator: Sam Clovis, Senior White House Advisor, USDA, Office of the Secretary, Washington, DC

Mississippi River and Atchafalaya Basin Nutrient Strategy

The Nature Conservancy has a strategic plan for edge-of-field systems, the 4R nutrient strategy, and more in watersheds that contribute half the nutrients.

Larry Clemens, North American Agriculture Director, The Nature Conservancy, Angola, IN

Edge-of-Field Conservation Systems in the Upper Mississippi Basin

Use and effectiveness of edge-of-field conservation systems (saturated buffers, bioreactors, drainage water management) in reducing nutrient transport in the Upper Basin.

Mark Tomer, Soil Scientist, Agroecosystems Management Research, USDA, Agricultural Research Service, Ames, IA

Edge-of-Field Conservation Systems in the Lower Mississippi Basin

Use and effectiveness of edge-of-field conservation systems (saturated buffers, bioreactors, drainage water management) in reducing nutrient transport in the Lower Basin.

Bryan Piazza, Director, Freshwater and Marine Science, The Nature Conservancy, Baton Rouge, LA

An Overview of the NRCS MRBI Initiative Accomplishments

The Mississippi River Basin Initiative is a collaboration of NRCS and partners accelerating voluntary, private-lands conservation investments to improve water quality.

Dee Carlson, MRBI Coordinator, USDA, Natural Resources Conservation Service, Washington, DC

TRACK: COMMODITY OUTLOOKS

Dairy Outlook

Salons A and B

A comprehensive global outlook and projections for the world market in 2018 and beyond.

Moderator: Sharon Sydow, Senior Economist, USDA, Office of the Chief Economist, Washington, DC

Continued on next page

Friday, February 23, 2018 (continued)

Dairy Outlook

Salons A and B

A comprehensive global outlook and projections for the world market in 2018 and beyond.

Moderator: Sharon Sydow, Senior Economist, USDA, Office of the Chief Economist, Washington, DC

Outlook for the U.S. Dairy Sector

Shayle Shagam, Livestock and Dairy Analyst, USDA, World Agricultural Outlook Board, Washington, DC

Canada's Dairy Policy

Kristy Goodfellow, Senior Trade Policy Advisor, USDA, Foreign Agricultural Service, Washington, DC

Short- and Medium Term Outlook for the European Union Dairy Sector

Pierluigi Londero, Head of Unit, Analysis and Outlook, European Commission - Directorate-General for Agri, Brussels, Belgium

TRACK: FOOD SAFETY

Food Safety: Arming Consumers With the Right Knowledge and Tools

Salons III

How USDA supported research and extension work together to ensure food safety across the food chain from the farm to the consumer.

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

Protecting Ourselves: What Do We Need To Know?

The question of How do research and extension work together across the food chain to ensure food safety will be addressed.

Ben Chapman, Extension Food Safety Specialist and Associate Professor, North Carolina State University, Raleigh, NC

Protecting Consumers Through Extension and Outreach

USDA applies extension and outreach to deliver USDA supported food safety programs to consumers.

Aaron Lavalley, Deputy Assistant Administrator, USDA, Food Safety and Inspection Service, Washington, DC

Protecting and Educating Consumers Through New Innovative Technologies

USDA supports innovations, technologies, and other resources that protect and educate consumers on food-borne contaminants and disease.

Max Teplitski, USDA, National Institute for Food and Agriculture, Washington, DC

TRACK: ADJUSTING TO LOWER COMMODITY PRICES

Consolidation in Agriculture

Salons V and VI

A number of agricultural-related companies are currently pursuing mergers and acquisitions. Questions have been raised as to the impact these mergers would have on competition, small and

independent companies, choice, and research and development.

This session explores these issues and the elements of the antitrust reviews of the mergers.

Moderator: Joe Outlaw, Regents Fellow, Professor and Extension Economist, Texas A&M University, College Station, TX

Mergers, Concentration, and Competition in Agriculture and Agribusiness

Concentration has increased in many agribusiness industries. Why? What are the costs and benefits of concentration.

James MacDonald, Chief, Structure, Technology and Productivity Branch, USDA, Economic Research Service, Washington, DC

What Is Driving the Rise in M&A in Agriculture?

A series of mergers promises to reduce the Big 6 seed and agricultural chemical countries to a Big 4. Could the mergers benefit agriculture?

John Newton, Director, Market Intelligence, American Farm Bureau Federation, Washington, DC

Antitrust Cases in Agribusiness

Antitrust in agribusiness: When do mergers affect competition in pricing and innovation? How do agencies pursue this question?

William Stallings, Partner, Mayer Brown Law Firm, Washington, DC

TRACK: RULES AND REGULATION

Right-Sizing Regulation

Salons I and II

New Executive Orders point toward opportunities to make regulation more targeted and more cost-aware. This session will explore how regulation can be more measured for the greater good.

Moderator: Rebeckah Adcock, Senior Advisor to the Secretary and Regulatory Reform Officer, USDA, Office of the Secretary, Washington, DC

Moving Forward by Looking Back: Reviewing Regulation on the Ground

Economic analysis of regulation is critical to rule-making.

Comprehensive regulatory review shouldn't end when the rules take effect.

Cary Coglianese, Director, University of Pennsylvania Program on Regulation, Philadelphia, PA

How Will Dodd-Frank Affect Agriculture?

Regulations intended to address systemic financial risks can impact agricultural operators and traders. These regulations can have both intended and unintended consequences.

Nicole Moran, Senior Manager, Cornerstone Research, Washington, DC

Right-Sizing Rules To Protect Plants and Minimize Burdens

The Animal and Plant Health Inspection Service has reduced regulatory burden through streamlined regulation and non-regulatory solutions.

Osama El-Lissy, Deputy Administrator, Plant Protection & Quarantine, USDA, Animal and Plant Health Inspection Service, Washington, DC

2018 USDA Agricultural Outlook Forum Student Diversity Program Winners

Undergraduate Winners Topic: "Agriculture as a Career"

Name	University	University Type
Stephanie Alvarado	California State University, Chico	*HSI
Cameron Bradshaw	Kansas State University	1862
Brittany Carter	Auburn University	1862
Ciara Cox	Cornell University	1862
Alexis Doon	University of Maryland Eastern Shore	1890
Victoria Gastelum	California State Polytechnic University, Pomona	HSI
Keia Jones	Virginia State University	1890
Keyla Lara-Leiguarda	University of Puerto Rico-Mayaguez	HSI
Caitlinn Lineback	Purdue University	1862
Jaime Luke	University of Missouri	1862
Tobechukwu Opara	University of Maryland Eastern Shore	1890
Javier Medina Sanchez	University of Puerto Rico-Mayaguez	HSI
Esha Tariq	University of Maryland College Park	1862
Raymond Thomas	Prairie View A&M University	1890
Jasmine Thompson	Alcorn State University	1890
Kyleigh Tyler	Utah State University	1862
Jabril Wright	North Carolina A&T State University	1890
Wesley Yu	Oregon State University	1862
Ramiro Zavala	California State University-Stanislaus	HSI
Haylee Zwick	Ohio State University	1862

Graduate Winners

Topic: "The Greatest Challenge Facing Agriculture Over the Next 5 Years"

Name	University	University Type
Maria Cuellar	New Mexico State University	HSI
Dillon Davidson	Oklahoma State University	1862
Allen Deutz	South Dakota State University	1862
Catherine Dobbins	University of Arkansas	1862
Kanita Hutchinson	Tennessee State University	1890
Emma Jobson	Montana State University	1862
Justin Key	Lincoln University	1890
Daniel Munoz	New Mexico State University	HSI
Kenton Sena	University of Kentucky	1862
Sara Webb	Clemson University	1862

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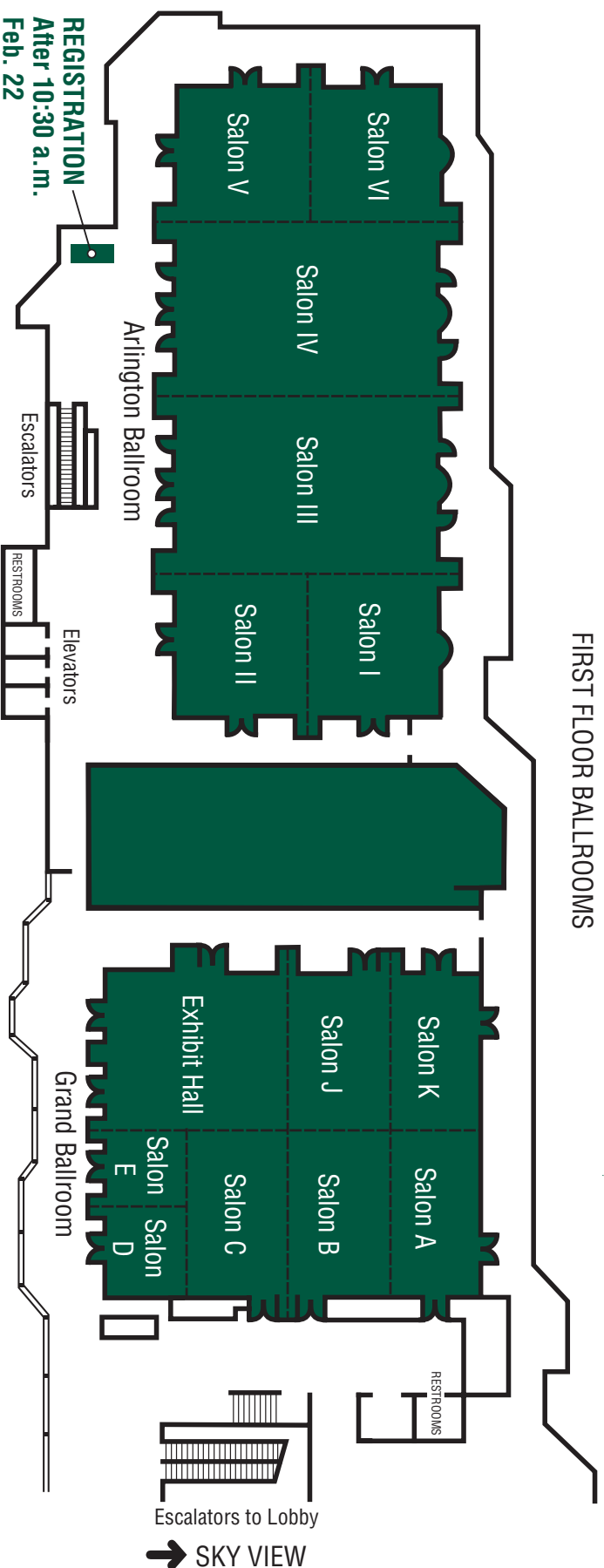
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Wednesday, February 21, 2018
5:00 p.m.—7:00 p.m.

Thursday, February 22, 2018
7:00 a.m.—10:30 a.m.



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