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**OPENING REMARKS BY DEPUTY SECRETARY JIM MOSELEY  
79<sup>TH</sup> AGRICULTURAL OUTLOOK FORUM  
ARLINGTON, VA FEBRUARY 20, 2003**

**GOOD MORNING AND WELCOME TO THE 79<sup>TH</sup> AGRICULTURAL  
OUTLOOK FORUM.**

**I'M DEPUTY SECRETARY JIM MOSELEY.**

**IT'S A GREAT PLEASURE TO OPEN THIS CONFERENCE AND  
EXTEND A WARM WELCOME TO ALL TO OUR INTERNATIONAL  
GUESTS Y OUR DISTINGUISHED SPEAKERS AND PANELISTS,  
PRODUCERS, AND REPRESENTATIVES FROM ALL ACROSS  
INDUSTRY AND ACADEMIA.**

**LAST YEAR ABOUT 1400 JOINED US HERE IN ARLINGTON,  
VIRGINIA.**

**DESPITE THE SNOW THAT HIT THE WASHINGTON AREA THIS  
WEEK, WE'LL COME CLOSE TO THAT NUMBER AGAIN THIS  
YEAR ... WHICH INDICATES THE INTENSE INTEREST SO MANY**

**SHARE IN THE LONG-TERM OUTLOOK FOR AGRICULTURE. I WANT TO THANK EVERYONE WHO MADE SPECIAL TRAVEL PLANS AND EFFORTS TO BE HERE.**

**I ALSO WANT TO WELCOME THOSE TUNING IN VIA THE INTERNET. OUR OPENING MORNING SESSIONS AND THIS AFTERNOON'S FARM ORGANIZATION ROUNDTABLE CAN BE VIEWED ON THE USDA HOMEPAGE IN DELAYED VIDEO.**

**THOSE OF YOU WHO ARE VETERANS OF THIS FORUM KNOW THAT IN THE PAST FEW YEARS USDA ADDED A NEW DIMENSION TO THIS RICH INSTITUTION.**

**MOVING BEYOND CURRENT MARKET PROSPECTS, WE BEGAN TO LOOK LONG TERM AT THE ECONOMIC FORCES SHAPING THE AGRICULTURAL SITUATION, BOTH HERE IN THE U.S. AND AROUND THE WORLD.**

**LAST YEAR, IN THE AFTERMATH OF SEPTEMBER 11<sup>TH</sup>, WE HIGHLIGHTED NEW CHALLENGES TO DELIVERING A SAFE AND**

**NUTRITIOUS FOOD SUPPLY INCLUDING BIO-SECURITY AND TRACKING CROP AND PRODUCT IDENTITY IN THE FOOD SYSTEM.**

**WE'LL KEEP THAT DISCUSSION GOING, BUT THIS YEAR IN THE CONTEXT OF ISSUES PRODUCERS FACE AS THEY COMPETE IN THE 21<sup>ST</sup> CENTURY.**

**AT THIS POINT, I'D LIKE TO ASK ALL OF THE PRODUCERS IN THE AUDIENCE TO STAND.**

**WE THANK YOU FOR BEING HERE AND WE SALUTE YOU.**

**IN THESE TWO DAYS WE'LL OFFER SESSIONS THAT WILL EXPLORE THE PRESSURES YOU'RE UP AGAINST.**

**THERE'S NO QUESTION THAT U.S. FARMERS ARE THE MOST EFFICIENT IN THE WORLD. BUT AGRICULTURE IS A BUSINESS WITH A BOTTOM LINE INFLUENCED BY ANY NUMBER OF FORCES BEYOND THE FARMER'S CONTROL.**

**IN TODAY'S WORLD, THINGS ARE CHANGING RAPIDLY THAT INCREASE COMPETITION OVERSEAS AND RAISE THE BAR ON THE COST OF PRODUCTION HERE AT HOME.**

**IN ADDITION TO INCREASED CONCERNS ABOUT FOOD SAFETY, PRODUCERS FACE A RANGE OF DOMESTIC PRESSURES, FROM URBANIZATION THROUGH CONSUMER DEMANDS AND MARKET CONSOLIDATION.**

**SPEAKERS WILL LOOK AT RISK MANAGEMENT AND CROP INSURANCE PROGRAMS. THEY'LL LOOK AT HOW THE NEW FARM BILL REWRITES SOME OF THE RULES FOR FARMERS.**

**THIS HISTORIC CONSERVATION LEGISLATION BUILDS IN OPPORTUNITY FOR PRODUCERS TO ADDRESS THE SCOPE AND DEMANDS OF ENVIRONMENTAL ISSUES, AS WELL AS THE ROLE THAT ENERGY PRODUCTION NOW PLAYS IN THEIR PLANNING.**

**OUR FIRST PANELISTS THIS MORNING WILL FOCUS ON FOUR KEY ASPECTS OF COMPETING IN THE 21<sup>ST</sup> CENTURY-- TRADE**

**POLICY, CONSUMER AND ENVIRONMENTAL DEMANDS, AND THE CHANGING STRUCTURE OF AGRICULTURE.**

**FOLLOWING THEM, EXPERTS WILL ASSESS OTHER FORCES AFFECTING THE MARKETPLACE -- INCLUDING AMERICA'S EATING HABITS, DIET, OBESITY, AND THE ROLE OF THE FOOD INDUSTRY IN ADDRESSING THESE ISSUES.**

**DISTINGUISHING THIS YEAR'S FORUM -- AND THE BIGGEST CHANGE FROM PAST YEARS IS THE FACT THAT MORE SPEAKERS THAN EVER ARE JOINING US FROM OTHER NATIONS. THIS EVENT TRULY HAS A GLOBAL PERSPECTIVE.**

**EXPERTS WILL LOOK, FOR EXAMPLE, AT THE CHALLENGES WE'RE FACING TO SOME OF OUR LONG-HELD ASSUMPTIONS ON SUPPLY AND DEMAND.**

**DEVASTATING DROUGHTS IN THE U.S. AND OTHER COUNTRIES TRADITIONALLY MEAN TIGHT SUPPLIES AND HIGHER PRICES FOR FOOD AND OTHER COMMODITIES.**

**NOW, AS THE WORLD BECOMES MORE PROSPEROUS AND MORE ADVANCED IN PRODUCING FOOD, WE'RE SEEING NON-TRADITIONAL SUPPLIERS STEPPING UP TO THE PLATE AND MOVING INTO OUR EXPORT MARKETS.**

**THE QUESTION IS: HOW FUNDAMENTAL B HOW PERMANENT B ARE THESE CHANGES IN MARKET STRUCTURE? ARE THEY HERE TO STAY?**

**DISTINGUISHED SPEAKERS FROM BRAZIL, ASIA, AND CENTRAL AND EASTERN EUROPE WILL EXAMINE ASPECTS OF COMPETITIVENESS FROM THEIR PERSPECTIVES.**

**TOMORROW, IN A DISCUSSION OF NEGOTIATIONS UNDER THE WORLD TRADE ORGANIZATION, WE'LL HEAR FROM THREE SPEAKERS REPRESENTING THE UNITED STATES, THE CAIRNS GROUP AND DEVELOPING COUNTRIES... SHARING THEIR VIEWS OF THE CHALLENGES OF TRADE.**

**TO PACKAGE THIS CONFERENCE AROUND THE THEME OF 21<sup>ST</sup>  
CENTURY COMPETITION Y THIS MORNING, TREASURY UNDER  
SECRETARY JOHN TAYLOR WILL LOOK AT THE LINKS  
BETWEEN GLOBAL ECONOMIC CONDITIONS AND  
AGRICULTURE. ..**

**Y AND PLEASE JOIN US THIS EVENING WHEN BETSY HOLDEN  
OF KRAFT FOODS B ONE OF THE MOST RESPECTED BUSINESS  
LEADERS IN THE COUNTRY B WILL BE OUR FEATURED DINNER  
SPEAKER.**

**IN SHORT, THIS IS A PROGRAM DESIGNED TO HELP YOU THINK  
THROUGH WHERE AGRICULTURE IS HEADED AND WHAT YOUR  
ROLE IS LIKELY TO BE. WE WELCOME YOUR THOUGHTS ... AND  
WITH THAT, THANK YOU AND LET-S GET STARTED.**