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U.S. Department of Agriculture

February 21-22, 2008

U.S. Agricultural Trade Policy in the Post Doha World

Allen F. Johnson

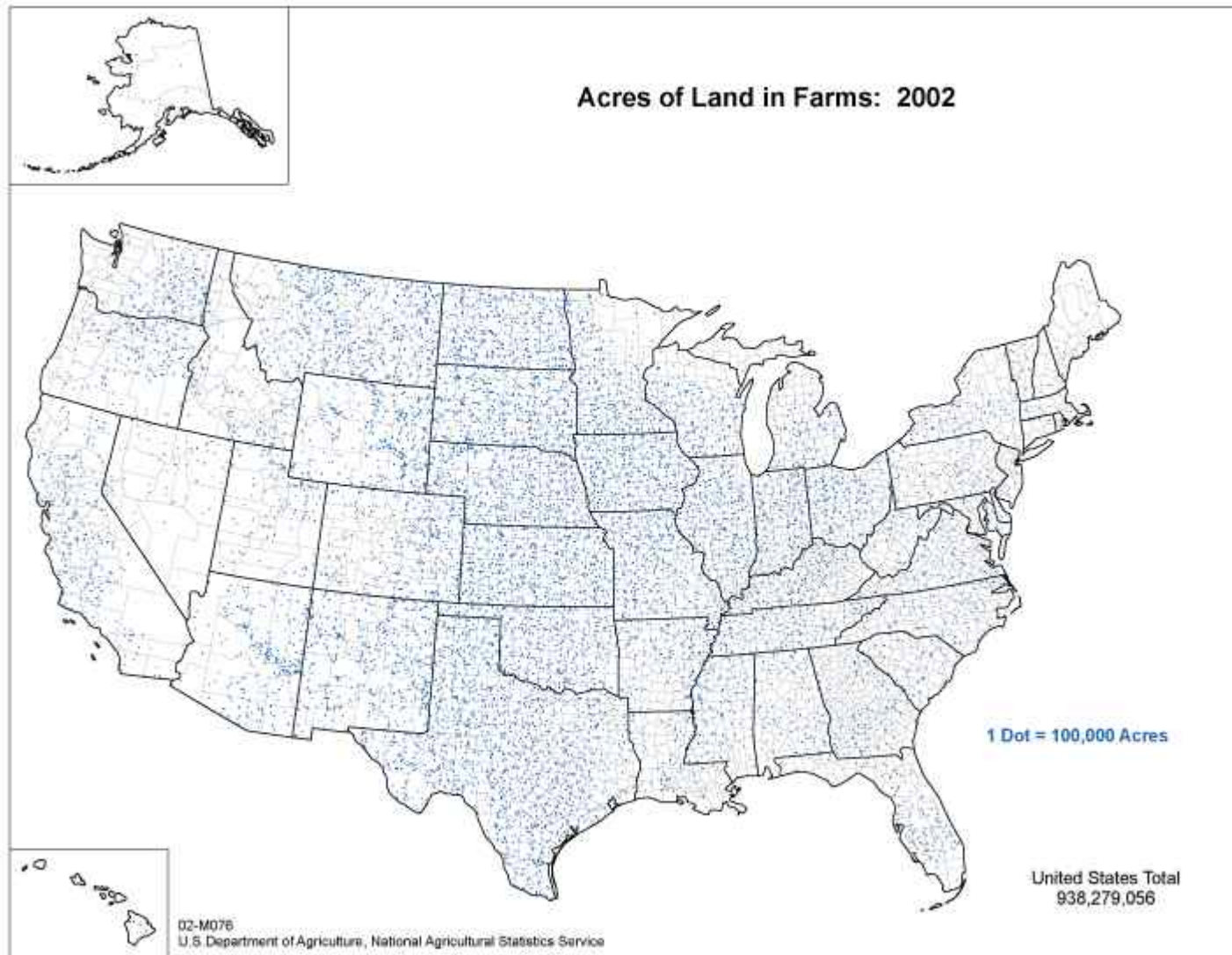


U.S. Agricultural Trade Policy in the Post Doha World

Allen F. Johnson
President, AFJ & Associates

21 February 2008

- Role of U.S. agriculture in U.S. trade policy
- Past trade agreements for U.S. agriculture
- Determining factors for the future
- Issues under focus in the post-Doha world



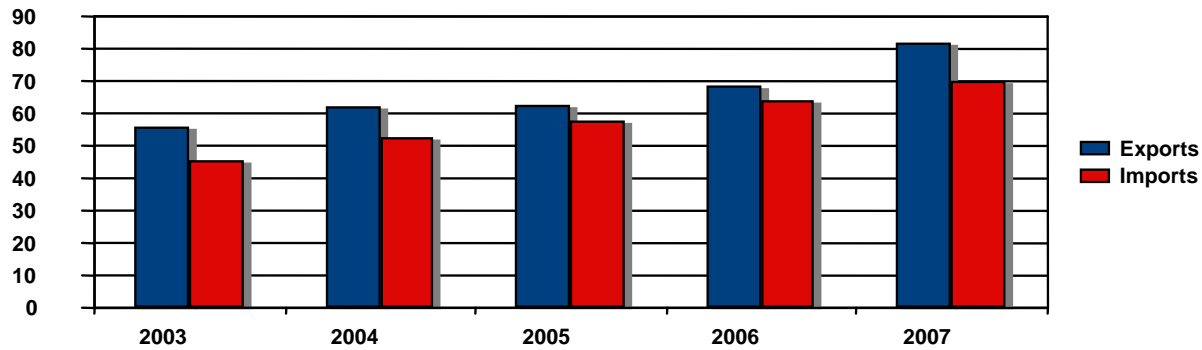
Economics

Cash receipts: \$282.2 billion
 Net Cash Income: \$85.2 billion

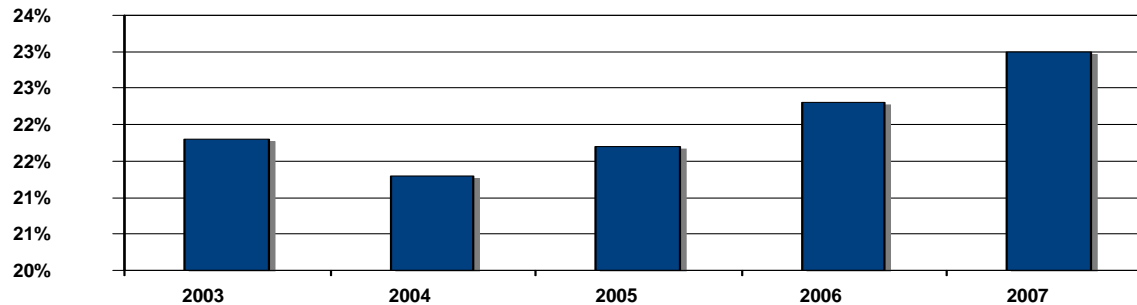
2007 forecast

U.S. Agricultural Exports and Imports

Billion dollars



U.S. Agricultural Exports as Share of Total Value of Production



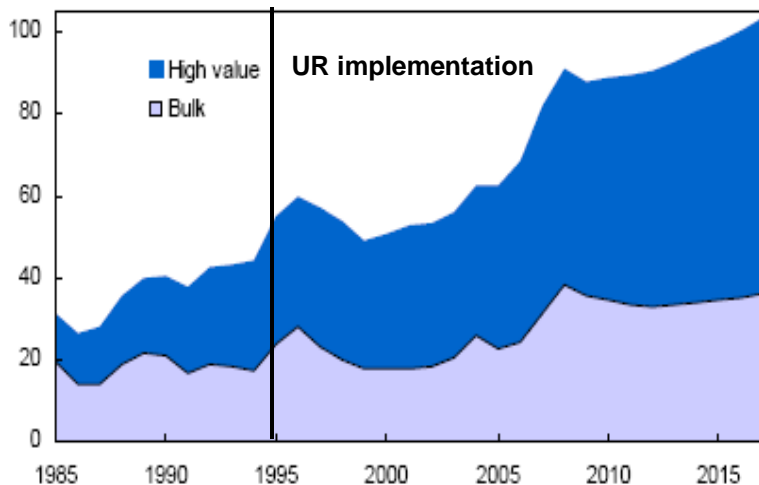
Source: USDA.

Trade Agreements and U.S. Agriculture

- Pre-Uruguay Round
- Uruguay Round
- NAFTA
- China WTO Accession
- CAFTA
- Peru
- Panama, Colombia, Korea

U.S. agricultural export value: Bulk and high value 1/

Billion dollars



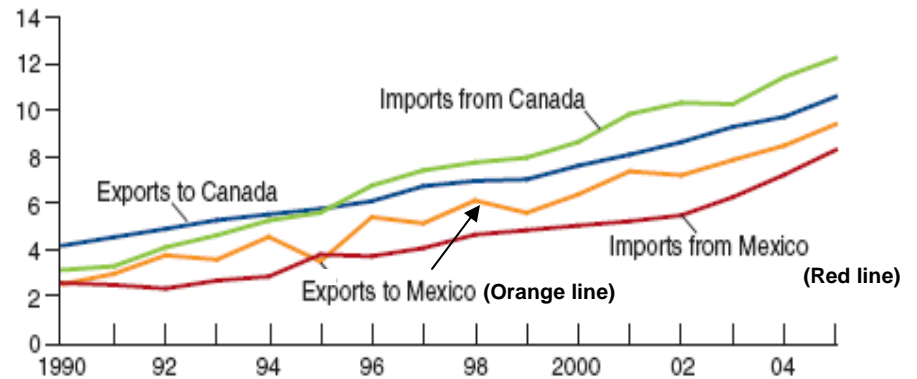
1/ Bulk commodities include wheat, rice, feed grains, soybeans, cotton, and tobacco. High-value products include semi-processed and processed grains and oilseeds, animals and animal products, horticultural products, and sugar and tropical products.

USDA Baseline, 2008

Uruguay Round and NAFTA

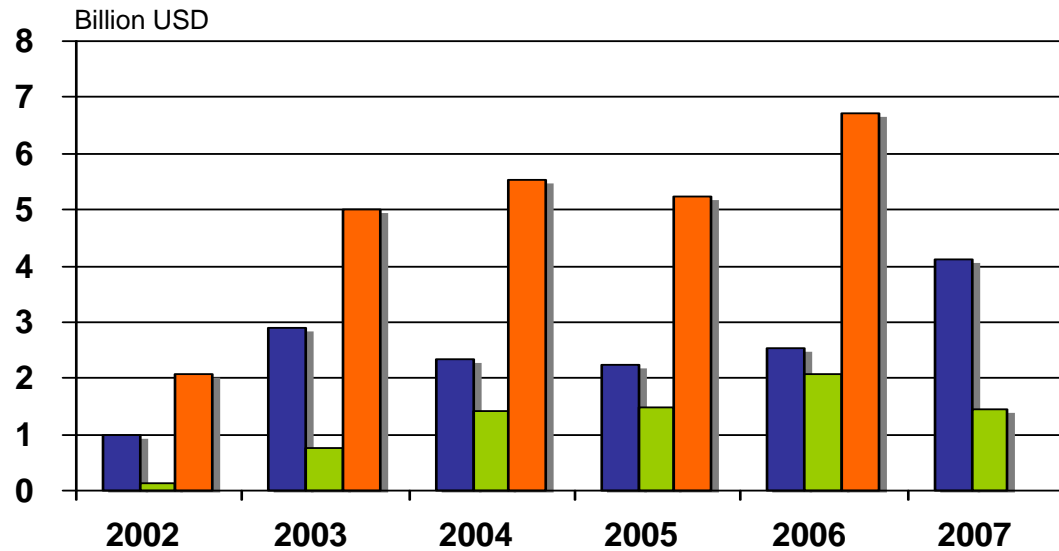
U.S. agricultural trade with its NAFTA partners increased by nearly 150 percent between 1993 and 2005

U.S. \$ billion

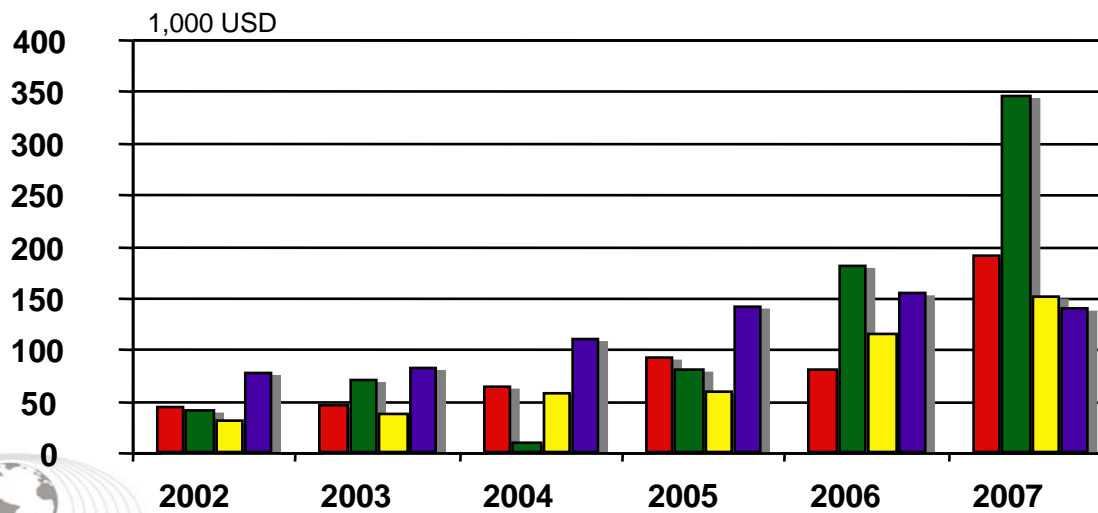


Source: USDA, Foreign Agricultural Service (2007).

U.S. Agriculture Exports to China.

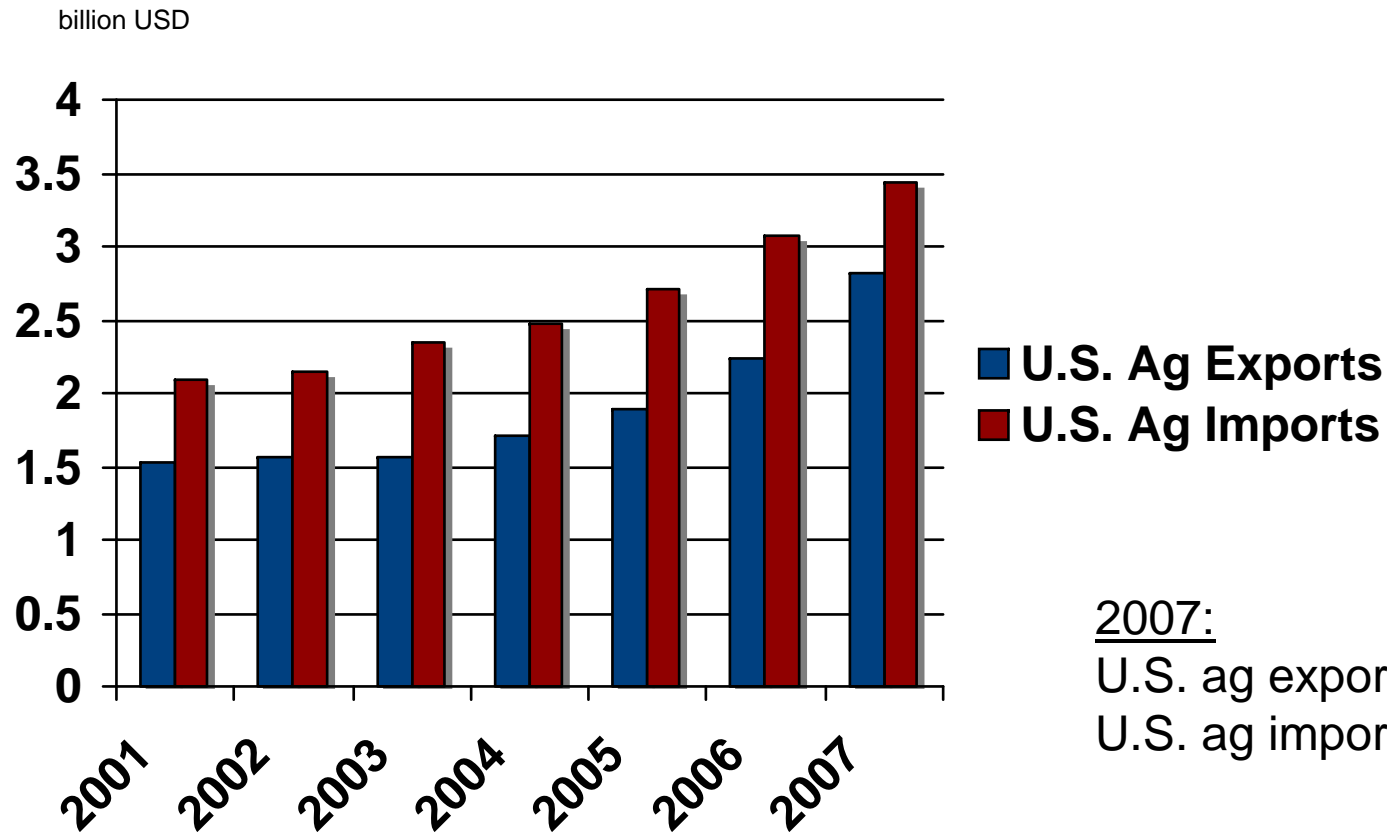


China joins WTO in November 2002



Source: USDA.

U.S. Agriculture Trade with CAFTA-DR Countries.



CAFTA rolling implementation began in 2006

Source: USDA.

The U.S. trade agenda will be defined by a number of factors

- The specifics of the Doha Round
 - Deal or no deal?
 - Perceptions of the equity of the Doha Round
 - How much new market access created (trade flows)
 - Subsidy constraints, U.S. imports
- Record of implementation and enforcement of agreements
 - Addressing high profile trade barriers
 - Trade performance with trading partners
- Biofuels
 - Effect on farm prices
 - Effect on farm psychology
- Global market trends
 - Emerging markets consumption and import patterns
 - Developments in EU farm programs
 - Direction of U.S. farm policy debate
 - Other trade issues - environment, carbon trading, etc.

Key issues in the post-Doha world

- TPA
- Doha Round
 - Legislative approval
 - Continued negotiation
 - Start over
- FTA approval
 - Panama
 - Colombia
 - Korea
- New FTAs
 - Japan
 - China
 - ASEAN
 - Other

Key issues in the post-Doha world, continued

- New WTO Round
 - Focused on key issues of the day (environment, labor, carbon?)
- Enforcement and Implementation
 - Current WTO litigation (biotech, cotton)
 - Future WTO cases
 - FTA implementation

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