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United States Department of Agriculture

USDA's  
93rd  
Annual

# Agricultural Outlook Forum

# A New Horizon:

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# The Future of Agriculture

February 23-24, 2017

Crystal Gateway Marriott Hotel  
Arlington, Virginia

[www.usda.gov/oce/forum](http://www.usda.gov/oce/forum)

# USDA 2017 Agricultural Outlook Forum Welcome

The future of agriculture has both challenges and prospects as the Nation faces a new horizon. In 2016, American farmers pressed forward during a geographical mix of drought and flooding. In that midst, there has been significant growth in sustainable agriculture, the emergence of new markets for U.S. agricultural products and off-farm opportunities. The most recent Census of Agriculture (2012) shows there are 3.2 million farm operators across the country. The Market Value of Agricultural Products report shows products sold in accordance with the 2012 Census of Ag was \$394,644,481,000 with the average per farm totaling \$187,097. These

numbers reflect the importance and impact of Rural America to the Nation's overall economy and the country's international agricultural relationships. The Agricultural Outlook Forum is a platform facilitating conversation on key issues and topics within the agricultural community, including academic leaders, producers, processors, policy makers, government officials, and both foreign and domestic non-government organizations. USDA continues to seek out fresh and pioneering ways to expand opportunity and provide support for America's farming families, which is at the core of the 93rd Agricultural Outlook Forum.

## “A New Horizon: The Future of Agriculture”

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



Seth Meyer  
Program Chair

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

## USDA Agricultural Outlook Forum, Student Diversity Program

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

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

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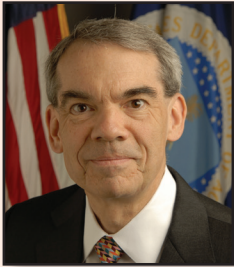


USDA's  
93rd  
Annual

# Agricultural Outlook Forum

# A New Horizon

## Looking Toward "The Future of Agriculture"



**Welcome**  
Michael Young  
*Acting Deputy Secretary*



**Distinguished Speaker**  
Terry Branstad  
*Governor of Iowa*



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



**2017 Agricultural &  
Foreign Trade Outlook**  
Robert Johansson  
*USDA Chief Economist*

## Plenary Panel with Agriculture Industry Leaders



**Moderator**  
Sara Wyant  
*Agri-Pulse  
Communications,  
Inc.  
President*



**Panelist**  
Rajiv Singh  
*Rabobank  
North America  
Wholesale  
CEO*



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



**Panelist**  
Luke Chandler  
*John Deere  
Deputy Chief  
Economist*

## Dinner Speaker



**Speaker**  
Zippy Duvall  
*American Farm  
Bureau Federation  
President*

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

# You Are Invited To Attend:

Thursday, February 23

<b>Morning Coffee</b>	<b>Grand Ballroom Foyer</b> <i>9:45 a.m.</i>
<b>Networking Luncheon</b>	<b>Salons A, B, C, D, E &amp; Sky View</b> <i>12:30 p.m.</i>
<b>Women's Networking Event</b>	<b>Sky View</b> <i>3:15 p.m.</i>
<b>Reception</b>	<b>Exhibit Hall Salons F, G &amp; H</b> <i>5:30 p.m.</i>
<b>Forum Dinner</b>	<b>Salons III &amp; IV</b> <i>6:30 p.m.</i>

Friday, February 24

<b>Luncheons</b>	<b>12:15 – 1:30 p.m.</b>
• Cotton & Fibers	Salons J & K
• Sugar & Sweeteners	Salons C, D & E
• Specialty Crops	Salons A & B
• Grains & Oilseeds	Salons III & IV
• Livestock & Poultry	Salons V & VI

On the USDA 2017 Agricultural Outlook Forum Web Site: [www.usda.gov/oce/forum](http://www.usda.gov/oce/forum)

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

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



# A New Horizon

Thursday, February 23

7:00 a.m.	Registration <i>(Wednesday Evening Early Onsite Registration 5-7 p.m.)</i>				
8:00 a.m.	Welcome				
8:05 a.m.	2017 Agricultural & Foreign Trade Outlook				
8:45 a.m.	Distinguished Address				
9:35 a.m.	Keynote Address				
10:20 a.m.	Coffee Break				
10:40 a.m.	Industry Plenary and Question & Answer				
12:30 p.m.	Networking Luncheon				
<b>Concurrent Sessions</b>					
1:45 p.m.	<b>International Markets &amp; Trade</b>	<b>Food Price Outlook &amp; Pest &amp; Disease</b>	<b>Farm Income Outlook &amp; Finance Outlook</b>	<b>Environmental Quality</b>	<b>Agriculture for the Future</b>
	India: Challenges & Opportunities Salon IV	Food Price Outlook Salon III	Farm Income Outlook Salon V & VI	Soil Health Management System Salon I & II	The Outlook for Organic Agriculture Salon J & K
3:15 p.m.	— Women's Networking Event — Sky View —				
3:45 p.m.	South America Trade Salon IV	Pest & Disease Pressures Salon III	Ag Financial Stress Test Salon J & K	New Model For Conservation: RCPP Salon I & II	The Role of Data in Food Safety Salon V & VI
5:30 p.m.	Cash Bar Reception				
6:30 p.m.	Forum Dinner Speaker				

Friday, February 24

7:00 a.m.	Registration				
7:30 a.m.	Exhibit Hall Opens				
<b>Concurrent Sessions</b>					
8:00 a.m.	<b>Farm Policy &amp; Funding</b>	<b>Water &amp; Climate</b>	<b>Commodity Outlooks</b>	<b>Commodity Outlooks</b>	<b>Marketing &amp; Consumer-Driven Practices</b>
	Farm Policy Changes Salon A & B	Making Decisions in a Changing Climate Salon V & VI	Grains & Oilseeds Outlook Salon III & IV	Sugar Outlook Salon J & K	Growing Demand For Cage-Free Eggs Salon I & II
9:30 a.m.	Break				
10:00 a.m.	Farm Safety Net Salon A & B	Building Resilience in a Water Scarce World Salon V & VI	Livestock & Poultry Outlook Salon III & IV	Cotton Outlook Salon J & K	Marketing-Driven Changes In Ag Production Salon I & II
<b>Visit Exhibit Hall</b>					
<b>Luncheons</b>					
12:15 p.m.	Cotton & Fibers Salon J & K	Sugar & Sweeteners Salon C, D, & E	Specialty Crops Salon A & B	Grains & Oilseeds Salon III & IV	Livestock & Poultry Salon V & VI
1:30 p.m.	Break				
<b>Concurrent Sessions</b>					
2:00 p.m.	<b>SPS Trade Agreement Enforcement</b>	<b>GMO Labeling</b>	<b>Commodity Outlook</b>	<b>Bio-Based Opportunities</b>	<b>Nutrition</b>
	SPS Measures & U.S. Ag Exports Salon J & K	GMO Disclosure: Transparency for the Market Salon A & B	Dairy Outlook Salon III	The BIO-Economy: Fuels, Jobs and Power Salon V & VI	Nutritional Security Through Ag Production Salon I & II
3:30 p.m.	<b>Adjourn</b>				

# A New Horizon: The Future of Agriculture



Thursday, February 23, 2017

1:45pm – 3:15pm

## TRACK: INTERNATIONAL MARKETS AND TRADE

### INDIA: Challenges and Opportunities

#### Salon IV

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

**Moderator:** *Richard M. Rossow, Senior Fellow and Wadhvani Chair, U.S.-India Policy Studies, Center for Strategic and International Studies, Washington, DC*

### India's Agricultural Transition: Is Demand Outpacing Policy?

Recent policy developments and the growing pressures on policy-makers to reform agricultural and trade policies.

*G. Chandrashekar, Economic Advisor and Director, Indian Merchant's Chamber (IMC), Mumbai, India*

### Future Trade and Investment Opportunities in the Indian Market

Recent and medium-term performance for agricultural trade and agribusiness in the Indian market.

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

### Exporting to India

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

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

## TRACK: FOOD PRICE OUTLOOK AND PEST AND DISEASE

### Food Price Outlook

#### Salon III

The latest perspective on food price inflation, the main factors that contribute to changes in food prices, and the consumer implications of rising food prices.

**Moderator:** *Timothy Park, Food Markets Branch Chief, USDA, Economic Research Service, Washington, DC*

### 2017 Food Price Outlook

The latest Economic Research Service outlook for retail food prices along with a look at recent historical trends in food expenditure patterns.

*Annemarie Kuhns, Economist, USDA, Economic Research Service, Washington, DC*

### Retail Revolution: How Technology and the New Consumer Are Transforming the Food Retail Landscape

How consumers are using technology to shape their decisions and retail strategies for using these same tools to stay competitive in a world of new choices.

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

### Market Concentration and Markups in the Food Retail Industry: Evidence From Military Commissary Data

How markups among large food retailers vary with the size and number of firms competing within markets.

*Richard Volpe, Professor, California Polytechnic University, San Luis Obispo, CA*

## TRACK: FARM INCOME OUTLOOK & FINANCE OUTLOOK

### Farm Income Outlook

#### Salon V & VI

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

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

### Farm Sector Income Forecast

This presentation focuses on the Farm Sector Income forecast.

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

### Farm Household Income Forecast

This presentation focuses on the Farm Household Income forecast.

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

### "Past as Prologue: Lessons From the 1980s Farm Financial Crisis"

This presentation places the current financial situation and outlook data into historical context.

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

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

## TRACK: ENVIRONMENTAL QUALITY

### Soil Health Management Systems: Challenges and Opportunities

#### Salons I & II

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

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

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

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

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

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

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

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

### Producer Perspectives on Soil Health and Decisionmaking

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

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



## TRACK: AGRICULTURE FOR THE FUTURE

### The Outlook for Organic Agriculture

#### Salons J & K

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

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

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

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

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

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

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

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

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

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

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

**3:45pm – 5:15pm**

## TRACK: INTERNATIONAL MARKETS AND TRADE

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

#### Salon IV

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

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

### Brazil's Economic Recession: Impact on the Competitiveness of Agriculture

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

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

Continued on next page



### Argentina's Agribusiness Potential

New economic reforms are encouraging Argentinean farmers and agribusiness to boost production and trade to regain the country's status as an important global agricultural player.

*Patricia Bergero, Deputy Director for Information and Economic Research at the Bolsa de Comercio de Rosario, Buenos Aires, Argentina*

### Brazil and Argentina's Recession, Reforms, and Renewal: Opportunities and Challenges for U.S. Agriculture

Potential impact of Brazil's economic recession and Argentina's reforms on U.S. agriculture production, trade, and world market prices.

*C. Parr Rosson, Professor and Department Head, Department of Agricultural Economics, Texas A&M University, College Station, TX*

## TRACK: FOOD PRICE OUTLOOK AND PEST AND DISEASE

### Significant Pest and Disease Issues Confronting U.S. Agriculture

#### Salon III

Recent experience with HPAI, Citrus greening, and Equine piroplasmiasis demonstrate the significance of pest and disease threats to American agriculture, and highlight the need for evaluation of the response to such emergencies. Animal and plant emergencies increase costs due to crop damage, increased mortality and decreased yields, as well as increased expenditures for control and management.

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

#### The Case of Highly Pathogenic Avian Influenza (HPAI)

In 2015, the U.S. experienced its worst-ever outbreak of HPAI, leading to the destruction of about 50 million birds at a cost of nearly \$1 billion to the Government.

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

#### The Case of Equine Piroplasmiasis

Equine piroplasmiasis can, indeed, be spread by species of ticks endemic to this country. Vigilance in identifying and combating this disease was crucial in preventing a crisis.

*Don Knowles, Research Leader, USDA, Agricultural Research Service and Washington State University, Pullman, WA*

#### The Case of Citrus Greening

Citrus growers in Florida, Texas, and California have contended with many diseases and pests over the years. None has posed the threat they now face with citrus greening.

*Ned Hancock, President and Owner, Hancock Citrus, Incorporated, Sebring, FL*



## TRACK: FARM INCOME OUTLOOK AND FINANCE OUTLOOK

### Ag Finance Stress Test

#### Salons J & K

The continued slide in farm sector income is raising concerns that farms are experiencing higher levels of financial stress after several years of higher incomes. The session will examine direct evidence, including data on farm loan delinquencies and Chapter 12 bankruptcies, in order to put current levels of farm financial stress in historical perspective.

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

#### Assessing Financial Stress in the AgStar Portfolio

Methods for assessing and addressing financial stress in the AgStar portfolio, including the current outlook for farm sectors served by member banks.

*Joseph Deufel, Executive Vice President and Chief Credit Officer, AgStar Financial Services, Mankato, MN*

#### Farm Bankruptcies in the United States

Ongoing research on current and historical Chapter 12 bankruptcies (proxy for farm bankruptcies) and their use in depicting farm financial stress levels.

*Ani Katchova, Associate Professor, Ohio State University AED Economics, Columbus, OH*

#### Assessing Financial Stress in the FSA Loan Portfolio

A review of USDA's Farm Service Agency loan activity, portfolio trends, and current conditions and the degree to which they reflect changes in credit availability for farmers.

*Speaker: Jim Radintz, Deputy Administrator for Farm Loan Programs, USDA, Farm Service Agency, Washington, DC*

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## TRACK: ENVIRONMENTAL QUALITY

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

#### Salons I & II

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

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

#### An Overview of the RCPP

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

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

#### The Nature Conservancy and RCPP

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

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

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

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

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

## TRACK: AGRICULTURE FOR THE FUTURE

### The Role of Data In Food Safety

#### Salons V & VI

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

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

### Federal Data Collection, Release, and Usage

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

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

### Industry Data Sharing and Usage

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

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

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

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

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

6:30 p.m.

### DINNER SPEAKER

Salons III & IV



Zippy Duvall

American Farm Bureau Federation  
President

Continued on next page



Friday, February 24, 2017

8:00am – 9:30am

**TRACK: FARM POLICY AND FUNDING**

**Farm Policy Changes: Home and Abroad**

**Salons A & B**

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

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

**Drivers, Challenges, and Priorities in Modernizing and Simplifying the Common Agricultural Policy (CAP)**

Identifying economic, environmental, and climate change drivers around which the debate for the future of the CAP evolves.

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

**Brexit - UK Farming Steps Out Into the World**

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

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

**U.S. Farm Policy: Continuity or Change?**

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

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

**TRACK: WATER AND CLIMATE**

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

**Salons V & VI**

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

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

**Adaptation Workbook: A Climate Change Tool for Agricultural Management and Conservation**

A look at the Climate Change Adaptation Workbook, which is a structured process to respond to the effects of climate change on individual agricultural operations.

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

**Making Decisions for an Uncertain Future: Farmer Decisionmaking**

Examples of how farmers have integrated climate change into their operational decisions.

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

**Incorporating Climate Change and Sustainability into Kellogg's Decisionmaking**

How the Kellogg company has integrated climate change into its operations and sustainability goals.

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

**TRACK: COMMODITY OUTLOOKS**

**Grains and Oilseeds Outlook**

**Salons III & IV**

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

**USDA Grains and Oilseeds Outlook**

*Rachel Trego, Agricultural Economist, USDA, Foreign Agricultural Service, Washington, DC*

**LaNiña and Its Impact on Agriculture**

*Eric Luebehusen, Meteorologist and Geographic Information System (GIS) Specialist, USDA, World Agricultural Outlook Board, Washington, DC*

**Russian Wheat: The New Reference for Cash Wheat Worldwide**

*Swithun Still, Director, Solaris Commodities S.A., Morges, Switzerland*

**TRACK: COMMODITY OUTLOOKS**

**Sugar Outlook**

**Salons J & K**

There are many challenges to U.S. sugar consumption arising from emerging new patterns of consumer awareness. The session addresses issues of genetically modified organisms and the effect on sweeteners from a scientific point of view, the perception of consumers and food companies, and challenges to USDA's management of the U.S. Sugar Program.

**Moderator:** *Vidalina Abadam, Agricultural Economist, Dairy & Sweeteners Analysis Group, USDA, Farm Service Agency, Washington, DC*

**Freedom To Choose: Scientific Evidence vs. Fake News**

The role of science in the evaluation of foods based on genetically modified design.

*L. Val Giddings, Senior Fellow, Information Technology & Innovation Foundation, Silver Spring, MD*

## Americans' Health Choices: Implications for the U.S. Sugar Industry

Discussion of Americans' attitudes on changing U.S. diets and consumption of sugar-based sweeteners, as well as the reaction of food companies and implications for the Sugar Program.

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

## Beet Versus Cane: Challenges to the U.S. Sugar Program

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

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

## TRACK: MARKETING AND CONSUMER-DRIVEN PRACTICES

### Growing Demand for Cage-Free Eggs

#### Salons I & II

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

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

### Overview of the Transition to Cage-Free Production

An overview of the transition to cage-free production and address how the market will reach equilibrium.

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

### Producers' Perspective

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

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

### Buyers' Perspective

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

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

2017 Student Diversity  
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10:00am – 11:30am

## TRACK: FARM POLICY AND FUNDING

### Farm Safety Net

#### Salons A & B

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

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

### Risk Management and the Rural Economy

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

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

### Farm Loans and Crop Insurance

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

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

### More Crop Insurance Options Means More Can Access Credit

New options for beginning, organic, and diversified producers, brought in producers who had previously never purchased crop insurance, expanding their credit options as well.

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

## TRACK: WATER AND CLIMATE

### Building Resilience in a Water Scarce World

#### Salons V & VI

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

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

### Climate, Drought, Water, and Food Security

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

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

Continued on next page

### Water Scarcity and Farmer Adaptation

Farmers have considerable flexibility to adapt to changes in local weather, resource conditions, and price signals by adjusting crops, rotations, and production practices.

*Steve Wallander, Economist, USDA, Economic Research Service, Washington, DC*

### Five Policy Recommendations To Improve Response to Drought in the American West

Coping with drought is a major challenge for the West. This presentation will propose five, pragmatic, near-term reforms that can help Western States better manage drought.

*Ellen Hanak, Senior Fellow and Center Director, Public Policy Institute of California, San Francisco, CA*

### Water Markets, Management and Pricing

Water markets provide opportunities for farmers to receive payments for water management practices that protect quality, improve retention, and encourage conservation.

*Nicholas Brozovic, Director of Policy, University of Nebraska, Water for Food Institute, Lincoln, NE*

## TRACK: COMMODITY OUTLOOKS

### Livestock and Poultry Outlook

#### Salons III & IV

**Moderator:** *Keithly Jones, Cross-Commodity Analyst for Livestock and Poultry, USDA, Economic Research Service, Washington, DC*

### Outlook for the U.S. Livestock and Poultry Sectors

*Shayle Shagam, Livestock and Poultry Analyst, USDA, Office of the Chief Economist, Washington, DC*

### Production Efficiency and Capacity in the Livestock and Meat Industry – Finding Balance

*John S. Nalivka, President, Sterling Marketing Incorporated, Vale, OR*

### An Update on the Global Highly Pathogenic Avian Influenza Situation

*Lisa M. Ferguson, Director of Science and Policy, National Import Export Services, Veterinary Services, USDA, Animal and Plant Health Inspection Service, Riverdale, MD*

## TRACK: COMMODITY OUTLOOKS

### Cotton Outlook

#### Salons J & K

The session includes USDA's preliminary supply and demand outlook for the 2017/18 marketing year, a report on current strategies used in the global marketing of Supima cotton, and a presentation on weather analysis as it relates to projecting cotton yields in India.

**Moderator:** *Jody Campiche, Vice President, Economics and Policy Analysis, National Cotton Council, Cordova, TN*

### The World and U.S. Cotton Outlook for 2017/18

*Lyman Stone, Agricultural Economist, USDA, Foreign Agricultural Service, Washington, DC*

### Successes and Challenges of Marketing Supima Cotton

*Marc Lewkowicz, President and Chief Executive Officer, Supima, Tempe, AZ*

### Weather-Driven Cotton Yield Analysis for India

*Brian Morris, Agricultural Meteorologist, USDA, Office of the Chief Economist, Washington, DC*

## TRACK: MARKETING AND CONSUMER-DRIVEN PRACTICES

### Marketing-Driven Changes in Agricultural Production Salons I & II

Changes in production methods have traditionally been driven by technology changes that result in increases in efficiency or decreases in cost. Recently, however, production changes have been increasingly market driven. A look at three of these recent changes.

**Moderator:** *Laura Batcha, Executive Director, Organic Trade Association, Washington, DC*

### Slow-growing Chickens

Perdue is changing production methods “to address broiler chicken growth rates that cause discomfort to birds.” What’s the motivation behind this decision?

*Bruce Stewart-Brown, Senior Vice President, Food Safety and Quality, Perdue Farms, Lothian, MD*

### Antibiotic-Free Animal Agriculture

Antibiotic use in food animal production is the subject of intense public scrutiny. The organic sector has been a leader in eliminating the use of antibiotics in production.

*George Siemon, Chief Executive Officer, Organic Valley, La Farge, WI*

### Elimination of Gestation Crates for Hogs

There has been growing consumer backlash to the practice of housing sows in gestation crates. Smithfield has announced that it will eliminate the use by 2017.

*Stewart Leeth, Vice President, Regulatory Affairs and Chief Sustainability Officer, Smithfield, Smithfield, VA*

### Local Foods

Among the marketing-driven changes in agriculture, local foods has been among the most widespread. This speaker will address the trend.

*Maisie Ganzler, Chief Strategy & Brand Officer, Bon Appétit Management Company, Palo Alto, CA*

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12:15pm – 1:30pm

**TRACK: LUNCHEONS**

**Cotton and Fibers**

*Salons J & K*

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

**The Progress of West African Cotton Production and Trade**

His Excellency Mr. Tiéna Coulibaly, Ambassador of Mali, will present his perspective on the progress and challenges of the cotton industry in Mali and West Africa.

*His Excellency Mr. Tiéna Coulibaly, Ambassador of Mali, Washington, DC*



**TRACK: LUNCHEONS**

**Sugar and Sweeteners**

*Salons C, D, & E*

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

**A Policymaker's Perspective on Managing the U.S. Sugar Program**

What it was like having to make tough decisions managing the U.S. sugar program and the challenges that came with increased sweeteners' trade with Mexico under NAFTA.

*Michael Scuse, Secretary, Delaware Department of Agriculture, Dover, DE*



**TRACK: LUNCHEONS**

**Specialty Crops**

*Salons A & B*

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

**Food and Agriculture Global Trends**

Examining global trends in food and agriculture, the interplay between food safety and public perception of risk, and how organizations build trust to navigate these trends.

*Jack Bobo, Chief Communications Officer, Intrexon Corporation, Germantown, MD*



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

**TRACK: LUNCHEONS**

**Grains and Oilseeds**

*Salons III & IV*

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

**Outlook for Grains and Oilseeds in 2017**

*Dan Basse, President, AgResource Company, Chicago, IL*



**TRACK: LUNCHEONS**

**Livestock and Poultry**

*Salons V & V*

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

**Meat-ing the Challenge: Expanding Integrated Protein Supply Chains Across Asia**

Challenges and opportunities facing Brazil and the United States in marketing meat versus grain proteins.

*Marcos S. Jank, Vice President, Corporate Affairs and Business Development – Asia Pacific, BRF ASIA-PACIFIC, Singapore*



2:00pm - 3:30pm

**TRACK: SPS TRADE AGREEMENT ENFORCEMENT**

**Sanitary and Phytosanitary (SPS) Measures and U.S. Agricultural Exports**

*Salons J & K*

Agricultural trade is vital to the global economy and exports are important in sustaining market opportunities for U.S. agriculture. Expanding global trade and declining tariffs and traditional barriers to trade have brought more focus on SPS measures. SPS measures are now among the most frequently cited non-tariff barriers to trade that cause friction/dispute among trading partners.

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

**Sanitary and Phytosanitary (SPS) Standards Implementation**

The science in support of trade policy, SPS issues including our bilateral process and our efforts to establish Meta standards for global trade.

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

**Industry Experience**

SPS measures play a progressively critical role in shaping the flow of international trade and are increasingly important to a number of U.S. agricultural producers.

*Christian Schlect, President, Northwest Horticultural Council, Yakima, WA*

Continued on next page

## **Analytical Findings: Sanitary and Phytosanitary (SPS) Measures and Agricultural Trade**

Research findings on specific SPS actions or trade concerns, the effects of SPS measures on a specific U.S. Ag sector, or the gains from trade agreements.

*Jason Grant, Associate Professor and Director of the Center for Agricultural Trade, Virginia Tech University, Blacksburg, VA*

## **TRACK: GMO LABELING**

### **GMO Disclosure: Transparency for the Market** *Salons A & B*

Labeling of genetically modified organisms may be the leading agricultural marketing policy issue today. This session will express a range of viewpoints regarding GMO products and their marketing, framed by discussion of the 2-year rule-making USDA is undertaking to implement the new GMO disclosure law.

**Moderator:** *Craig Morris, Deputy Administrator, USDA, Agricultural Marketing Service, Washington, DC*

### **The Manufacturer's Perspective**

The manufacturer of one of America's best-known brands shares the challenges and opportunities in mandatory GMO disclosure.

*Denise M. Morrison, President and CEO, Campbell Soup Company, Camden, NJ*

### **The Farmer's Perspective**

A national farmer leader will discuss how GMO disclosure can reshape the production process and impact farmers.

*Charles "Chip" Bowling, Chairman, National Corn Growers Association, Newburg, MD*

### **The Economic Perspective**

A leading agricultural biotechnology economist discusses industry and public interests in the GMO disclosure rule-making.

*Nicholas Kalaitzandonakes, MSMC Endowed Professor of Agribusiness Strategy, Director of the Economics and Management of Agrobio, University of Missouri, Columbia, MO*

## **TRACK: COMMODITY OUTLOOK**

### **Dairy Outlook** *Salon III*

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

### **Outlook for the U.S. Dairy Sector**

*Jerry Cessna, Agricultural Economist, Animal Products and Cost of Production Branch, USDA, Economic Research Service, Washington, DC*

### **Labor Constraints and the Dairy Sector**

*David P. Anderson, Professor and Extension Economist, Department of Agricultural Economics, Texas A&M University, College Station, TX*

### **The Economics of Robotic Milking Systems**

*Dr. Larry Tranel, Dairy Specialist, Iowa State University Extension and Outreach, Iowa State University, Dubuque, IA*

## **TRACK: BIO-BASED OPPORTUNITIES**

### **The BIO-Economy: Fuels, Jobs and Power** *Salons V & VI*

The bioeconomy can transform rural economies through the development of new products across several sectors, providing new markets and creating jobs to build stronger rural economies.

**Moderator:** *Harry Baumes, Director, Office of Energy Policy and New Uses, USDA, Office of the Chief Economist, Washington, DC*

### **Wood Generating Power, Stronger Economies**

Virginia's Southside community of Halifax is the site of a new biomass facility with enough renewable energy to power 16,000 homes from wood waste while also creating jobs.

*John Rainey, Director of Origination and Plant Operations, NOVEC, Northern Virginia Electric Cooperative, Manassas, VA*

### **Biofuels Producing Energy, Jobs**

Alternative fuels are powering jet engines and creating jobs, helping strengthen rural economies.

*Steve Csonka, Executive Director, Csonka Aviation Consultancy, LLC, Lebanon, OH*

### **Bioproducts Creating Job Opportunities**

Bio-based products have the potential to spur growth in rural areas by creating opportunities for production, distribution, and sales.

*Wes Bolson, Head, Global Business Development & External Affairs, Cool Planet, Greenwood Village, CO*

## **TRACK: NUTRITION**

### **Nutritional Security Through Agricultural Production** *Salons I & II*

Nutritional security is often defined as continuous access to adequate nutrients in food that are necessary to live a healthy and active life.

The goal of this session is to describe the factors that impact what is produced and the health outcomes in consumers. Discussion will center around how agricultural production can positively influence nutritional security of our Nation.

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

### **Promoting Nutritional Security Through USDA Nutrition Programs**

How does the Federal nutrition program support farmers and producers while reducing food insecurity for vulnerable Americans?

*Melissa Abelev, Assistant Deputy Administrator, USDA, Food and Nutrition Service, Alexandria, VA*

### **Consumer Issues and Food-Choice Behavior**

What drives consumer food choices and how do these choices impact an individual's overall nutritional well-being?

*David Buys, Extension/Research Assistant Professor and State Health Specialist, Mississippi State University, Mississippi State, MS*

### **Production Agriculture's Choices: What Drives What Is Produced?**

What factors, such as economics, consumer behavior, and the environment, play in what is produced?

*Robert Guenther, Senior Vice President, Public Policy, United Fresh Produce Association, Washington, DC*

## 2017 USDA Agricultural Outlook Forum Student Diversity Program Winners

### Undergraduate Winners

Sarah Baskins, *California State University, Stanislaus*

Taylor Boone, *University of Maryland College Park*

Zhane Brown, *Prairie View A&M University*

Nakia Coit, *University of Maryland Eastern Shore*

Nora Faris, *University of Missouri*

Carlos Flores, *Kansas State University*

Vanessa Garcia Polanco, *University of Rhode Island*

Joshua Harms, *Oregon State University*

Helena Hollins, *Langston University*

Brandon Jackson, *University of Maryland Eastern Shore*

Jeremy Jolly, *South Carolina State University*

Brittney Langer, *California State University, Chico*

Vivian Maier, *Fresno State University*

James Martin, *North Carolina A&T State University*

Virginia Miller, *University of Nevada*

Rocio Ortiz, *San Diego State University, Imperial Valley*

Deja Perkins, *Tuskegee University*

Matthew Schroepfer, *South Dakota State University*

Bailey Thomas, *Texas State University*

Jessica Vallejo, *San Diego State University*

### Graduate Winners

Benjamin Brown, *University of Missouri*

Tiffany Carter, *Kansas State University*

Jabari Hawkins, *University of Maryland Eastern Shore*

Grant Lapke, *Oklahoma State University*

Gregory McNealy, *Florida A&M University*

Luis Rodriguez-Cruz, *University of Puerto Rico, Mayaguez*

Timothy Silberg, *Michigan State University*

Arneisha Smallwood, *North Carolina A&T State University*

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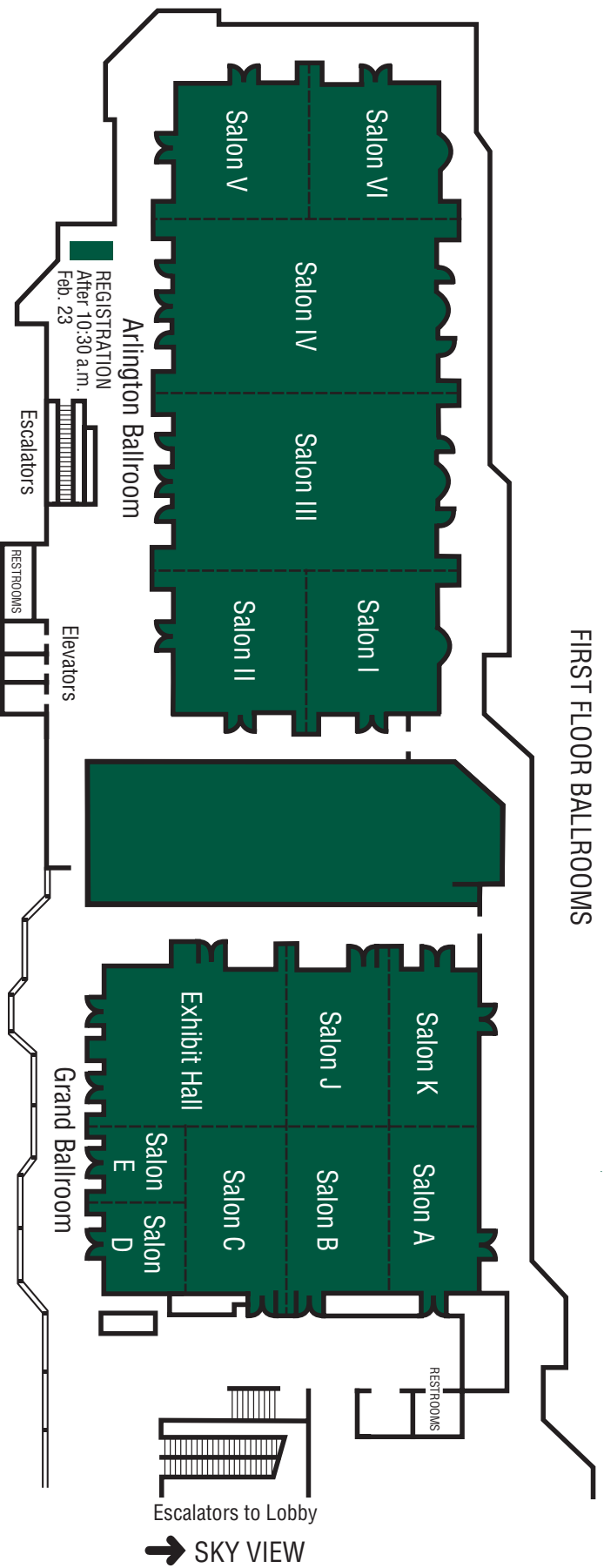
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