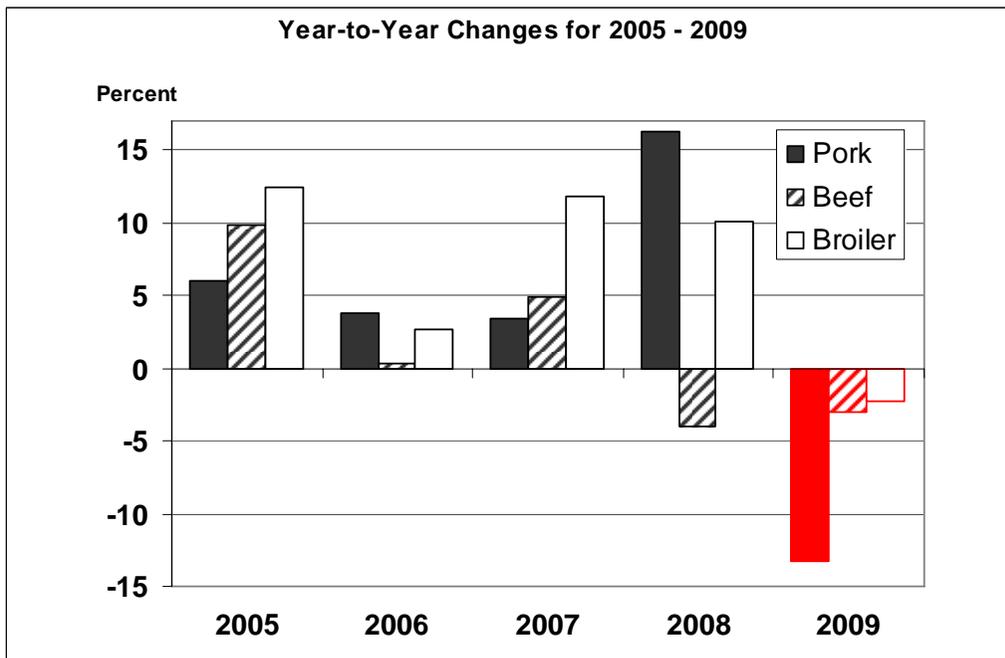




# Livestock and Poultry: World Markets and Trade

## World Meat Import Demand to Fall



For the first time in over a decade, global imports of pork, beef, and broiler meats are all forecast to decline in a single year. Deterioration in the global economic situation, restrictive trade policies, the stronger U.S. dollar and changing market conditions, are among the reasons for falling demand in some major importing countries.

The drop in global pork imports can mostly be attributed to a combination of cost prohibitive Russian out-of-quota tariffs, Ukraine's worsening economic conditions and currency devaluation, and greater Chinese pork production. These three countries account for over 20 percent of world demand, but nearly 80 percent of the year-to-year drop.

Weaker beef demand by many principal importers such as Russia, Mexico and South Korea will more than offset growth in the United States and the EU, two of the world's largest importers.

Global imports of broiler meat are down mainly because of Russia, which accounts for 15 percent of world imports in 2008. Russia's restrictive import quotas and cost prohibitive out-of-quota tariffs constrain trade, while production is expanding with newer facilities as the government is committed to becoming a net exporter in the near future.

Note: Data in this document reflects the PSD (<http://www.fas.usda.gov/psdonline>) and WASDE release of April 9, 2009.

# **Livestock and Poultry: World Markets and Trade**

**April 2009**

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## Summary: Major Traders and U.S. Trade of Beef, Pork, and Poultry

	2004	2005	2006	2007	2008 (p)	2009 (f)	Percent Change 2008 to 2009
<b>Production</b>							
Beef and Veal /1	55,585	56,679	58,159	58,898	58,538	57,648	-1.5%
Pork /1	92,074	94,551	96,156	94,700	98,441	100,318	1.9%
Broiler and Turkey /2	64,583	67,983	69,192	73,324	76,549	76,490	-0.1%
Total	212,242	219,213	223,507	226,922	233,528	234,456	0.4%
<b>Consumption</b>							
Beef and Veal /1	55,244	56,204	57,368	58,308	57,769	57,038	-1.3%
Pork /1	91,860	94,189	95,920	94,549	98,269	100,171	1.9%
Broiler & Turkey /2	63,780	67,172	68,894	72,935	75,570	76,227	0.9%
Total	210,884	217,565	222,182	225,792	231,608	233,436	0.8%
<b>Imports</b>							
Beef and Veal /1	6,164	6,769	6,791	7,121	6,834	6,632	-3.0%
Pork /1	4,474	4,741	4,921	5,087	5,916	5,130	-13.3%
Broiler and Turkey /2	5,845	6,613	6,762	7,507	8,225	8,069	-1.9%
Total	16,483	18,123	18,474	19,715	20,975	19,831	-5.5%
<b>Exports</b>							
Beef and Veal /1	6,658	7,315	7,517	7,643	7,565	7,230	-4.4%
Pork /1	4,716	5,006	5,224	5,162	6,137	5,379	-12.4%
Broiler and Turkey /2	6,584	7,432	7,120	7,962	9,074	8,509	-6.2%
Total	17,958	19,753	19,861	20,767	22,776	21,118	-7.3%
<b>U.S. Exports</b>							
Beef and Veal /1	209	316	519	650	856	826	-3.5%
Pork /1	989	1,209	1,359	1,425	2,117	1,837	-13.2%
Broiler and Turkey /2	2,371	2,618	2,609	2,926	3,465	3,003	-13.3%
Total	3,569	4,143	4,487	5,001	6,438	5,666	-12.0%
<b>U.S. Market Share (%) of Exports Among Major Traders</b>							<b>Change in Market Share Points</b>
Beef and Veal /1	3%	4%	7%	9%	11%	11%	0%
Pork /1	21%	24%	26%	28%	34%	34%	0%
Broiler and Turkey /2	36%	35%	37%	37%	38%	35%	-3%
Combined	20%	21%	23%	24%	28%	27%	-1%

**Source:** USDA-FAS attache reports, official statistics, and results of office research.

**(p)** preliminary; **(f)** forecast

1/ 1,000 Metric Tons (Carcass Weight Equivalent)

2/ 1,000 Metric Tons (Ready to Cook Equivalent)

Note to Readers: Totals include only those countries that make up USDA's official PSD database are reported. This means totals do not encompass all production, consumption, and trade, but rather the sum of those countries reported in USDA's database, which represent the most important players in the world meat PSD situation. In an attempt to capture these major players, the list of countries reported changes periodically.

## **BEEF AND VEAL: 2009 REVISED FORECAST OVERVIEW**

*Note: Significant revisions in the historical and forecast Indian cattle and beef PSDs are included in the April 2009 release. These revisions, particularly for 2008 and 2009 estimates and forecasts of beef production and trade, reflect new data and methodology more than a change in the actual forecast.*

### **Global Production 2 Percent Lower on Reduced Cattle Supplies, Higher Input Costs and Lower Returns**

Cattle supplies in the United States and Argentina are forecast lower, generating tighter beef supplies. U.S. cattle inventory is at its lowest since 1959. Increased Brazilian slaughter in recent years has reduced supplies and spurred high prices, constraining domestic and foreign consumption growth. The sector also remains plagued by bankruptcies and plant closings by key packers. Argentina faces a shortage of feed reserves, the reduction of thousands of hectares of pastures (turned into cropland or affected by drought), and a smaller corn crop. China is adversely affected by rising input costs, and low returns. Alternatively, expansion in both EU and Canadian production is based on a decline in feed grain prices and higher slaughter.

### **Consumption Shrinks for Most Countries, Strong Declines in Russia and Argentina**

In a period of global recession, consumers would be expected to shift to lower-cost animal proteins (such as pork and poultry) and non-animal proteins (such as fish and vegetable proteins), fewer meals at restaurants and smaller portions. In the case of South Korea, for example, beef is traditionally a side dish eaten at restaurants rather than at home. Initial survey data shows that when faced with diminished incomes, consumers will reduce eating out thus reducing beef consumption. Mexican and South Korean consumption will be dampened as they face higher import prices due in part to weaker currencies vis-à-vis the U.S. dollar.

### **Global Imports Ease 3 Percent as Economic Downturn Hits Beef**

Recession driven declines in consumption weakened Mexican and South Korean import demand. As Russian consumption contracts, imports are forecast down. Alternatively, tight U.S. supplies combined with a stronger dollar will bolster U.S. imports. EU imports are revised upward as more Brazilian farms will be eligible to ship beef to the EU.

### **World Exports Slump, Especially Brazil**

Almost no major beef exporter will avoid the global slump in import demand. Despite a more optimistic view of sales to the EU, a reduction in Russian and Middle East imports will result in the lowest level of Brazilian exports since 2004.

## **PORK: 2009 REVISED FORECAST OVERVIEW**

### **Global Production Up, Driven by Chinese Growth**

Production is now forecast up 2 percent from last year, as expansion in China (nearly 50 percent of world production) overshadows lower production for most other major producers. Chinese growth is fueled by continued government subsidies and strong domestic demand; production has fully recovered from the 2007 blue ear disease outbreak. Canadian production is also up in part because of higher slaughter rates as live hog exports are lower and herd downsizing continues. However in the United States, reductions in both the domestic herd and Canadian live swine imports contribute to lower pork production. While in Brazil, production is constrained by the credit crunch on traders and packers, and less import demand from Russia.

### **Slight (2 Percent) Consumption Growth Fueled by China and the United States**

A stronger Chinese economy in the latter half of 2009 is expected to spur consumption and more than offsets drops in Russian consumption due to trade-limiting import quotas. U.S. consumption remains relatively flat as lower production is offset by lower exports and higher imports.

### **World Imports Forecast to Drop off Steeply**

Global pork imports are now forecast to drop 13 percent from last year, with lower imports expected for 8 of the top 10 importing countries. High Russian tariff rates for out-of-quota pork, economic weakness and credit problems are now expected to limit imports to the quota. Chinese imports will shrink as higher production supported by a production subsidy program reduces the need for larger imports. Less Ukrainian imports are expected following exceptionally high 2008 imports, economic weakness and high imported pork prices because of currency devaluation.

### **Global Exports Cut**

Pork exports are now cut by 12 percent from last year with global economic weakness, the credit crunch, and trade restrictive policies. The United States is slashed coming off of record 2008 exports as sales to major markets are limited by reduced imports by China and trade restrictive policies in Russia. The EU is now forecast down 27 percent from last year as a result of tighter supplies and deteriorating export opportunities. Brazil is forecast to fall below 2008 due to the credit crunch and limited demand from Russia, Brazil's most important market.

## **BROILER MEAT: 2009 REVISED FORECAST OVERVIEW**

### **World Broiler Meat Production Expected Virtually Unchanged From 2008**

Oversupply, falling prices, and shrinking imports due to the global economic slowdown, are expected to cause production to stagnate in 2009. Over the previous 3 years production had expanded by 13 percent. Production in the United States, Brazil and China accounts for 55 percent of world output. Faced with large supplies and falling prices the Brazilian broiler industry is expected to drastically lower their rate of growth although production is still forecast to expand by 3 percent over last year. US production is expected to decline due to rapid increases in feed and energy costs. Over the longer term, continued adverse economic conditions coupled with lower prices and reduced domestic consumption are expected to dampen expansion. China's production growth is expected to slow down as the industry is experiencing losses due to avian influenza outbreaks, causing slaughterhouses to close. Russian and Ukrainian production continues to expand, aided by government subsidized credits and import restricting policies.

### **Global Consumption Forecast Up Slightly – But Below Past Growth Rates**

Higher production in the EU and Brazil will support expanding consumption in those countries. For the EU, despite rising domestic poultry prices, consumption continues to grow. US consumption is expected to decline due to the unsettled economic conditions as incomes are reduced. Chinese consumption growth is expected to slow as consumers shift to pork, their more favored meat, and unemployment rates of migrant workers rise; a major segment of the population that consumes poultry.

### **Global Imports are Expected to Ease Slightly**

Imports are now forecast to decline slightly in 2009, after imports had surged nearly 30 percent over the 3 previous years. Imports are expected to be constrained by restrictive import policies, high tariffs and weaker currencies in Russia and Ukraine, and oversupply in the case of Japan. Alternatively, Chinese, Mexican, and EU imports are revised upwards as more broiler meat is expected to be consumed in these markets.

### **World Exports Decline**

Lower exports from Brazil, the United States and the EU, which together account for 90 percent of global trade, reflects restrictive Russian import policies and intensified competition. Despite falling prices, Brazilian exports are estimated to have much slower growth as exports are forecast only slightly higher than in 2008, largely due to reduced imports by Japan. EU exports face more competition from lower-cost countries like Brazil and the United States. Declining U.S. exports reflect tighter domestic supplies and overstocked markets, among other factors.

**Beef and Veal Selected Countries**  
**1,000 Metric Tons (Carcass Weight Equivalent)**

	2005	2006	2007	2008	2009 Oct	2009 Apr
<b>Production</b>						
Brazil	8,592	9,025	9,303	9,024	9,395	8,935
EU-27	8,090	8,150	8,188	8,100	8,170	8,200
China, Peoples Republic of	5,681	5,767	6,134	6,100	6,360	6,000
Argentina	3,200	3,100	3,300	3,150	3,160	3,010
India	2,250	2,375	2,413	2,470	2,790	2,475
Mexico	2,125	2,175	2,207	2,225	2,293	2,230
Australia	2,102	2,183	2,172	2,159	2,070	2,100
Canada	1,523	1,391	1,279	1,285	1,260	1,340
Russian Federation	1,525	1,430	1,370	1,315	1,300	1,275
Pakistan	1,005	1,057	1,089	1,121	1,150	1,150
Others	9,268	9,526	9,347	9,426	8,804	8,828
<b>Total Foreign</b>	<b>45,361</b>	<b>46,179</b>	<b>46,802</b>	<b>46,375</b>	<b>46,752</b>	<b>45,543</b>
<b>United States</b>	<b>11,318</b>	<b>11,980</b>	<b>12,096</b>	<b>12,163</b>	<b>12,203</b>	<b>12,105</b>
<b>Total</b>	<b>56,679</b>	<b>58,159</b>	<b>58,898</b>	<b>58,538</b>	<b>58,955</b>	<b>57,648</b>
<b>Total Dom. Consumption</b>						
EU-27	8,550	8,649	8,691	8,362	8,490	8,520
Brazil	6,795	6,969	7,144	7,252	7,410	7,290
China, Peoples Republic of	5,614	5,692	6,065	6,062	6,324	5,968
Argentina	2,451	2,553	2,771	2,733	2,684	2,614
Mexico	2,428	2,519	2,568	2,591	2,685	2,538
Russian Federation	2,492	2,361	2,392	2,441	2,318	2,338
India	1,633	1,694	1,735	1,845	1,975	1,875
Japan	1,188	1,159	1,182	1,174	1,194	1,191
Pakistan	1,009	1,090	1,108	1,128	1,166	1,155
Canada	1,079	1,085	1,069	1,031	1,060	1,050
Others	10,301	10,764	10,754	10,698	10,185	9,945
<b>Total Foreign</b>	<b>43,540</b>	<b>44,535</b>	<b>45,479</b>	<b>45,317</b>	<b>45,491</b>	<b>44,484</b>
<b>United States</b>	<b>12,664</b>	<b>12,833</b>	<b>12,829</b>	<b>12,452</b>	<b>12,483</b>	<b>12,554</b>
<b>Total</b>	<b>56,204</b>	<b>57,368</b>	<b>58,308</b>	<b>57,769</b>	<b>57,974</b>	<b>57,038</b>

Source: USDA-FAS attache reports, official statistics, and results of office research.

Notes: 1/ May contain meat of other bovines.

2/ From 2009, Turkey is no longer included in the beef PSD.

Data for 2008 is preliminary. Data for 2009 is forecast.

**Beef and Veal Selected Countries Summary**  
**1,000 Metric Tons (Carcass Weight Equivalent)**

	2005	2006	2007	2008	2009 Oct	2009 Apr
<b>Total Imports</b>						
Russian Federation	978	939	1,030	1,137	1,030	1,075
Japan	686	678	686	659	690	660
EU-27	711	717	643	463	420	500
Mexico	335	383	403	408	435	350
Korea, Republic of	250	298	308	295	340	255
Venezuela	32	54	186	320	250	250
Canada	151	180	242	230	265	235
Egypt	221	292	293	205	240	205
Philippines	137	136	153	159	165	150
Chile	200	124	151	129	140	135
Others	1,436	1,591	1,642	1,678	1,681	1,561
<b>Total Foreign</b>	<b>5,137</b>	<b>5,392</b>	<b>5,737</b>	<b>5,683</b>	<b>5,656</b>	<b>5,376</b>
<b>United States</b>	<b>1,632</b>	<b>1,399</b>	<b>1,384</b>	<b>1,151</b>	<b>1,213</b>	<b>1,256</b>
<b>Total</b>	<b>6,769</b>	<b>6,791</b>	<b>7,121</b>	<b>6,834</b>	<b>6,869</b>	<b>6,632</b>
<b>Total Exports</b>						
Brazil	1,845	2,084	2,189	1,801	2,015	1,675
Australia	1,388	1,430	1,400	1,407	1,350	1,350
India	617	681	678	625	815	600
Canada	596	477	457	494	470	525
New Zealand	577	530	496	533	497	525
Argentina	754	552	534	421	480	400
Uruguay	417	460	385	361	420	350
Paraguay	180	232	196	232	290	245
EU-27	253	218	140	201	100	180
Colombia	13	31	114	206	160	175
Others	359	303	404	428	334	379
<b>Total Foreign</b>	<b>6,999</b>	<b>6,998</b>	<b>6,993</b>	<b>6,709</b>	<b>6,931</b>	<b>6,404</b>
<b>United States</b>	<b>316</b>	<b>519</b>	<b>650</b>	<b>856</b>	<b>934</b>	<b>826</b>
<b>Total</b>	<b>7,315</b>	<b>7,517</b>	<b>7,643</b>	<b>7,565</b>	<b>7,865</b>	<b>7,230</b>

Source: USDA-FAS attache reports, official statistics, and results of office research.

Notes: 1/ May contain meat of other bovines.

2/ From 2009, Turkey is no longer included in the beef PSD.

Data for 2008 is preliminary. Data for 2009 is forecast.

**Pork Selected Countries Summary**  
**1,000 Metric Tons (Carcass Weight Equivalent)**

	2005	2006	2007	2008	2009 Oct	2009 Apr
<b>Production</b>						
China, Peoples Republic of	45,553	46,505	42,878	46,150	46,000	48,700
EU-27	21,676	21,791	22,858	22,530	22,100	22,100
Brazil	2,710	2,830	2,990	3,015	3,160	3,010
Russian Federation	1,735	1,805	1,910	2,060	2,180	2,145
Canada	1,920	1,898	1,894	1,920	1,770	1,960
Vietnam	1,602	1,713	1,832	1,850	1,850	1,850
Japan	1,245	1,247	1,250	1,249	1,240	1,240
Philippines	1,175	1,215	1,245	1,190	1,200	1,200
Mexico	1,195	1,108	1,152	1,160	1,170	1,150
Korea, Republic of	1,036	1,000	1,043	1,056	1,045	1,000
Others	5,312	5,485	5,686	5,662	5,640	5,624
<b>Total Foreign</b>	<b>85,159</b>	<b>86,597</b>	<b>84,738</b>	<b>87,842</b>	<b>87,355</b>	<b>89,979</b>
<b>United States</b>	<b>9,392</b>	<b>9,559</b>	<b>9,962</b>	<b>10,599</b>	<b>10,507</b>	<b>10,339</b>
<b>Total</b>	<b>94,551</b>	<b>96,156</b>	<b>94,700</b>	<b>98,441</b>	<b>97,862</b>	<b>100,318</b>
<b>Total Dom. Consumption</b>						
China, Peoples Republic of	45,139	46,051	42,726	46,357	46,190	48,790
EU-27	20,632	20,632	21,507	20,970	20,680	20,905
Russian Federation	2,486	2,639	2,803	3,112	3,139	2,894
Japan	2,509	2,452	2,473	2,486	2,488	2,476
Brazil	1,949	2,191	2,260	2,390	2,455	2,400
Vietnam	1,583	1,731	1,855	1,880	1,889	1,884
Mexico	1,556	1,488	1,523	1,604	1,610	1,530
Korea, Republic of	1,311	1,420	1,502	1,519	1,468	1,440
Philippines	1,198	1,239	1,270	1,235	1,243	1,239
Canada	966	973	1,023	993	980	1,015
Others	6,191	6,464	6,641	6,912	6,902	6,714
<b>Total Foreign</b>	<b>85,520</b>	<b>87,280</b>	<b>85,583</b>	<b>89,458</b>	<b>89,044</b>	<b>91,287</b>
<b>United States</b>	<b>8,669</b>	<b>8,640</b>	<b>8,966</b>	<b>8,811</b>	<b>8,566</b>	<b>8,884</b>
<b>Total</b>	<b>94,189</b>	<b>95,920</b>	<b>94,549</b>	<b>98,269</b>	<b>97,610</b>	<b>100,171</b>

Source: USDA-FAS attache reports, official statistics, and results of office research.

Data for 2008 is preliminary. Data for 2009 is forecast.

**Pork Selected Countries Summary**  
**1,000 Metric Tons (Carcass Weight Equivalent)**

	2005	2006	2007	2008	2009 Oct	2009 Apr
<b>Total Imports</b>						
Japan	1,314	1,154	1,210	1,267	1,242	1,240
Russian Federation	752	835	894	1,053	960	750
Mexico	420	446	451	535	530	475
Korea, Republic of	345	410	447	430	440	400
Hong Kong	263	277	302	346	390	345
China, Peoples Republic of	88	90	198	430	360	300
Canada	139	145	171	195	230	205
Australia	105	109	141	152	155	140
Singapore	85	98	97	91	85	87
Belarus	40	52	8	60	55	55
Others	726	856	729	980	924	752
<b>Total Foreign</b>	4,277	4,472	4,648	5,539	5,371	4,749
<b>United States</b>	464	449	439	377	372	381
<b>Total</b>	4,741	4,921	5,087	5,916	5,743	5,130
<b>Total Exports</b>						
EU-27	1,143	1,284	1,286	1,715	1,475	1,250
Canada	1,084	1,081	1,033	1,129	1,080	1,150
Brazil	761	639	730	625	705	610
China, Peoples Republic of	502	544	350	223	170	210
Chile	128	130	148	142	120	130
Mexico	59	66	80	91	90	95
Australia	56	60	54	48	52	50
Korea, Republic of	16	14	13	11	15	15
Vietnam	19	20	19	11	11	11
Serbia	1	4	6	4	4	4
Others	28	23	18	21	19	17
<b>Total Foreign</b>	3,797	3,865	3,737	4,020	3,741	3,542
<b>United States</b>	1,209	1,359	1,425	2,117	2,313	1,837
<b>Total</b>	5,006	5,224	5,162	6,137	6,054	5,379

Source: USDA-FAS attache reports, official statistics, and results of office research.

Data for 2008 is preliminary. Data for 2009 is forecast.

**Broiler Meat Selected Countries Summary**  
**1,000 Metric Tons (Ready to Cook Equivalent)**

	2005	2006	2007	2008	2009 Oct	2009 Apr
<b>Production</b>						
China, Peoples Republic of	10,200	10,350	11,291	11,895	13,700	12,133
Brazil	9,350	9,355	10,305	11,033	11,417	11,360
EU-27	8,169	7,740	8,320	8,560	8,495	8,600
Mexico	2,498	2,592	2,683	2,804	2,860	2,795
India	1,900	2,000	2,240	2,490	2,770	2,350
Russian Federation	900	1,180	1,350	1,600	1,780	1,775
Argentina	1,030	1,200	1,320	1,420	1,550	1,430
Iran	1,237	1,327	1,423	1,425	1,425	1,425
Japan	1,166	1,258	1,250	1,267	1,260	1,260
South Africa, Republic of	884	946	1,005	1,070	1,112	1,112
Others	9,837	10,351	10,775	11,124	11,381	11,195
<b>Total Foreign</b>	47,171	48,299	51,962	54,688	57,750	55,435
<b>United States</b>	15,870	15,930	16,225	16,561	16,487	15,919
<b>Total</b>	63,041	64,229	68,187	71,249	74,237	71,354
<b>Total Dom. Consumption</b>						
China, Peoples Republic of	10,088	10,371	11,415	12,009	13,867	12,343
EU-27	8,082	7,655	8,358	8,497	8,565	8,595
Brazil	6,612	6,853	7,384	7,792	7,757	8,054
Mexico	2,868	3,016	3,067	3,240	3,295	3,252
Russian Federation	2,139	2,373	2,578	2,744	2,968	2,795
India	1,899	2,000	2,239	2,489	2,770	2,350
Japan	1,880	1,970	1,945	1,938	1,935	1,950
Iran	1,223	1,326	1,464	1,435	1,454	1,435
South Africa, Republic of	1,069	1,202	1,239	1,258	1,300	1,299
Argentina	941	1,109	1,200	1,260	1,420	1,285
Others	12,076	12,478	13,447	14,430	14,818	14,570
<b>Total Foreign</b>	48,877	50,353	54,336	57,092	60,149	57,928
<b>United States</b>	13,430	13,671	13,581	13,426	13,682	13,266
<b>Total</b>	62,307	64,024	67,917	70,518	73,831	71,194

Source: USDA-FAS attache reports, official statistics, and results of office research.

Notes: 1/ Chicken paws are not included.

Data for 2008 is preliminary. Data for 2009 is forecast.

**Broiler Meat Selected Countries Summary**  
**1,000 Metric Tons (Ready to Cook Equivalent)**

	2005	2006	2007	2008	2009 Oct	2009 Apr
<b>Total Imports</b>						
Russian Federation	1,225	1,189	1,222	1,159	1,190	980
EU-27	609	605	673	677	680	680
Japan	748	716	696	737	680	670
Saudi Arabia	484	423	470	510	500	510
Mexico	374	430	393	447	450	470
China, Peoples Republic of	219	343	482	399	450	425
Venezuela	104	124	163	352	320	360
United Arab Emirates	167	182	238	289	300	290
Vietnam	6	42	164	248	250	260
Hong Kong	222	243	215	236	250	245
Others	1,950	1,967	2,281	2,643	2,756	2,629
<b>Total Foreign</b>	<b>6,108</b>	<b>6,264</b>	<b>6,997</b>	<b>7,697</b>	<b>7,826</b>	<b>7,519</b>
<b>United States</b>	<b>15</b>	<b>21</b>	<b>28</b>	<b>35</b>	<b>36</b>	<b>36</b>
<b>Total</b>	<b>6,123</b>	<b>6,285</b>	<b>7,025</b>	<b>7,732</b>	<b>7,862</b>	<b>7,555</b>
<b>Total Exports</b>						
Brazil	2,739	2,502	2,922	3,242	3,660	3,306
EU-27	696	690	635	740	610	685
Thailand	240	261	296	383	360	360
China, Peoples Republic of	331	322	358	285	283	215
Argentina	92	94	125	164	135	150
Canada	102	110	139	152	150	125
Kuwait	97	38	60	70	70	70
Chile	60	64	39	63	55	65
United Arab Emirates	20	10	30	30	30	30
Australia	18	16	25	27	25	28
Others	73	88	75	82	75	80
<b>Total Foreign</b>	<b>4,468</b>	<b>4,195</b>	<b>4,704</b>	<b>5,238</b>	<b>5,453</b>	<b>5,114</b>
<b>United States</b>	<b>2,360</b>	<b>2,361</b>	<b>2,678</b>	<b>3,158</b>	<b>2,846</b>	<b>2,744</b>
<b>Total</b>	<b>6,828</b>	<b>6,556</b>	<b>7,382</b>	<b>8,396</b>	<b>8,299</b>	<b>7,858</b>

Source: USDA-FAS attache reports, official statistics, and results of office research.

Notes: 1/ Iraqi imports include all US broiler meat shipped to Turkey.

2/ Chicken paws are not included in the trade data.

Data for 2008 is preliminary. Data for 2009 is forecast.

**Turkey Meat Selected Countries Summary**  
**1,000 Metric Tons (Ready to Cook Equivalent)**

	2005	2006	2007	2008	2009 Oct	2009 Apr
<b>Production</b>						
EU-27	1,919	1,858	1,790	1,760	1,750	1,750
Brazil	360	353	458	510	550	550
Canada	155	163	169	172	172	172
Russian Federation	17	19	25	35	40	40
Mexico	14	14	15	15	16	16
South Africa, Republic of	5	5	7	7	7	7
China, Peoples Republic of	4	4	5	5	5	5
Others	4	4	4	0	0	0
<b>Total Foreign</b>	2,478	2,420	2,473	2,504	2,540	2,540
<b>United States</b>	2,464	2,543	2,664	2,796	2,733	2,596
<b>Total</b>	4,942	4,963	5,137	5,300	5,273	5,136
<b>Total Dom. Consumption</b>						
EU-27	1,888	1,841	1,769	1,750	1,750	1,750
Brazil	199	197	281	295	315	310
Mexico	197	200	213	218	223	223
Canada	143	144	149	156	158	158
Russian Federation	124	110	100	115	120	120
China, Peoples Republic of	16	21	35	55	65	65
South Africa, Republic of	30	39	47	32	32	32
Others	22	23	23	0	0	0
<b>Total Foreign</b>	2,619	2,575	2,617	2,621	2,663	2,658
<b>United States</b>	2,246	2,295	2,401	2,431	2,457	2,375
<b>Total</b>	4,865	4,870	5,018	5,052	5,120	5,033

Source: USDA-FAS attache reports, official statistics, and results of office research.

Notes: 1/ From 2008, Taiwan is no longer included in the turkey meat PSD.

Data for 2008 is preliminary. Data for 2009 is forecast.

**Turkey Meat Selected Countries Summary**  
**1,000 Metric Tons (Ready to Cook Equivalent)**

	2005	2006	2007	2008	2009 Oct	2009 Apr
<b>Total Imports</b>						
Mexico	185	189	202	207	211	211
EU-27	128	113	103	115	120	120
Russian Federation	107	91	75	80	80	80
China, Peoples Republic of	12	17	30	50	60	60
South Africa, Republic of	25	34	40	25	25	25
Canada	12	9	9	12	13	13
Others	18	19	19	0	0	0
<b>Total Foreign</b>	487	472	478	489	509	509
<b>United States</b>	3	5	4	4	5	5
<b>Total</b>	490	477	482	493	514	514
<b>Total Exports</b>						
Brazil	161	156	177	215	235	240
EU-27	159	130	124	125	120	120
Canada	24	27	27	27	28	28
Mexico	2	3	4	4	4	4
Others	0	0	0	0	0	0
<b>Total Foreign</b>	346	316	332	371	387	392
<b>United States</b>	258	248	248	307	288	259
<b>Total</b>	604	564	580	678	675	651

Source: USDA-FAS attache reports, official statistics, and results of office research.

Notes: 1/ From 2008, Taiwan is no longer included in the turkey meat PSD.

Data for 2008 is preliminary. Data for 2009 is forecast.

**Cattle Selected Countries Summary**  
(in 1,000 head)

	2005	2006	2007	2008	2009 Oct	2009 Apr
<b>Total Cattle Beg. Stks</b>						
India	282,500	282,300	282,000	281,700	281,400	281,400
Brazil	169,567	172,111	173,830	175,437	177,492	179,551
China, Peoples Republic of	112,354	109,908	104,651	105,948	107,095	106,123
EU-27	89,319	89,672	88,463	89,043	88,000	89,402
Argentina	53,767	54,266	55,664	55,662	55,162	54,760
Colombia	27,370	28,452	29,262	30,095	31,040	31,041
Australia	27,270	27,782	28,400	28,040	28,300	28,580
Mexico	27,572	26,949	26,644	26,725	27,094	27,132
Russian Federation	21,100	19,850	19,000	18,370	17,800	17,900
South Africa, Republic of	13,510	13,790	13,934	14,082	14,195	14,195
Others	76,945	75,735	74,098	67,459	55,051	56,201
<b>Total Foreign</b>	901,274	900,815	895,946	892,561	882,629	886,285
<b>United States</b>	94,018	96,342	96,573	96,035	96,200	94,491
<b>Total</b>	995,292	997,157	992,519	988,596	978,829	980,776
<b>Production (Calf Crop)</b>						
India	56,500	57,000	57,000	57,450	57,960	57,750
Brazil	47,309	48,188	48,845	49,298	49,660	49,563
China, Peoples Republic of	39,441	39,827	45,353	45,000	48,500	44,400
EU-27	32,207	30,625	31,500	31,250	30,500	31,050
Argentina	15,800	15,800	15,900	15,200	14,800	14,200
Australia	9,643	10,104	9,369	10,238	10,100	9,945
Mexico	7,500	7,950	8,200	8,235	8,500	8,550
Russian Federation	7,950	7,505	7,310	7,100	6,970	6,970
Colombia	5,735	5,740	5,750	5,760	5,765	5,765
Canada	5,501	5,339	5,541	5,300	5,400	5,100
Others	23,453	23,649	23,058	22,082	17,466	17,781
<b>Total Foreign</b>	251,039	251,727	257,826	256,913	255,621	251,074
<b>United States</b>	37,106	37,016	36,759	36,113	36,600	35,500
<b>Total</b>	288,145	288,743	294,585	293,026	292,221	286,574

Source: USDA-FAS attache reports, official statistics, and results of office research.

Notes: 1/ May contain other bovines.

2/ From 2008, the Philippines is no longer included in the cattle PSD.

From 2009, Turkey is no longer included in the cattle PSD.

Data for 2008 is preliminary. Data for 2009 is forecast.

**Cattle Selected Countries Summary**  
(in 1,000 head)

	2005	2006	2007	2008	2009 Oct	2009 Apr
<b>Total Imports</b>						
South Africa, Republic of	210	210	171	120	100	100
Mexico	85	72	81	90	144	82
Brazil	1	2	10	70	50	75
Egypt	43	19	30	35	50	50
Russian Federation	14	58	75	57	60	50
Canada	21	38	54	49	45	40
Japan	25	26	25	20	20	20
China, Peoples Republic of	50	15	15	15	8	16
EU-27	4	4	4	4	3	4
Ukraine	2	1	4	3	3	3
Others	105	64	47	11	1	1
<b>Total Foreign</b>	560	509	516	474	484	441
<b>United States</b>	1,816	2,289	2,495	2,284	2,300	2,000
<b>Total</b>	2,376	2,798	3,011	2,758	2,784	2,441
<b>Total Exports</b>						
Canada	559	1,032	1,412	1,598	1,300	1,150
Mexico	1,259	1,275	1,089	738	1,000	850
Australia	573	634	719	868	900	825
EU-27	364	469	387	459	300	450
Brazil	113	246	438	414	580	435
South Africa, Republic of	10	10	58	68	80	80
Uruguay	10	99	46	169	60	60
China, Peoples Republic of	54	54	51	33	30	30
Nicaragua	46	30	32	18	25	25
New Zealand	50	32	28	17	18	15
Others	143	254	140	20	11	11
<b>Total Foreign</b>	3,181	4,135	4,400	4,402	4,304	3,931
<b>United States</b>	22	50	66	107	130	60
<b>Total</b>	3,203	4,185	4,466	4,509	4,434	3,991

Source: USDA-FAS attache reports, official statistics, and results of office research.

Notes: 1/ May contain other bovines.

2/ From 2008, the Philippines is no longer included in the cattle PSD.

From 2009, Turkey is no longer included in the cattle PSD.

Data for 2008 is preliminary. Data for 2009 is forecast.

## Live Swine Selected Countries Summary

(in 1,000 head)

	2005	2006	2007	2008	2009 Oct	2009 Apr
<b>Total Beginning Stocks</b>						
China, Peoples Republic of	421,234	433,191	418,504	439,895	446,662	462,640
EU-27	156,973	159,115	161,526	159,732	158,000	156,250
Brazil	32,323	32,938	33,147	32,947	32,870	33,277
Russian Federation	16,500	16,550	17,180	18,187	19,520	19,562
Canada	14,810	15,110	14,907	13,810	12,435	12,400
Mexico	10,303	10,125	10,250	10,129	9,365	9,780
Japan	9,600	9,620	9,759	9,745	9,745	9,760
Korea, Republic of	8,044	8,098	8,518	8,742	8,263	8,223
Ukraine	6,466	7,052	8,055	7,020	5,943	6,440
Australia	2,530	2,490	2,471	2,605	2,550	2,181
Others	47,416	50,013	51,522	2,398	nr	nr
<b>Total Foreign</b>	726,199	744,302	735,839	705,210	705,353	720,513
<b>United States</b>	60,982	61,463	62,516	68,177	67,200	66,768
<b>Total</b>	787,181	805,765	798,355	773,387	772,553	787,281
<b>Production (Pig Crop)</b>						
China, Peoples Republic of	618,587	605,823	592,080	635,978	615,000	667,769
EU-27	257,362	259,158	265,100	261,000	257,000	257,000
Russian Federation	35,500	37,000	39,150	41,760	44,440	43,600
Brazil	32,295	33,304	34,530	34,845	36,040	35,600
Canada	33,020	32,274	31,832	31,249	29,000	29,800
Japan	17,000	16,950	17,050	16,950	16,880	16,850
Mexico	15,500	15,700	15,265	15,250	15,600	15,275
Korea, Republic of	13,817	13,943	14,422	13,792	14,174	13,476
Ukraine	6,865	7,543	6,986	6,528	6,100	6,250
Australia	5,283	5,301	5,480	4,422	4,950	4,619
Others	78,546	81,461	84,356	5,030	nr	nr
<b>Total Foreign</b>	1,113,775	1,108,457	1,106,251	1,066,804	1,039,184	1,090,239
<b>United States</b>	103,975	105,633	112,873	114,667	114,700	113,465
<b>Total</b>	1,217,750	1,214,090	1,219,124	1,181,471	1,153,884	1,203,704

Source: USDA-FAS attache reports, official statistics, and results of office research.

Notes: 1/ From 2008, the Philippines and Vietnam are no longer included in the swine and pork PSD.

Data for 2008 is preliminary. Data for 2009 is forecast.

**Swine Selected Countries Summary**  
(in 1,000 head)

	2005	2006	2007	2008	2009 Oct	2009 Apr
<b>Total Imports</b>						
Russian Federation	84	382	377	770	525	800
Mexico	181	196	136	80	225	75
Ukraine	139	40	12	86	75	75
China, Peoples Republic of	3	2	3	12	7	9
EU-27	1	6	2	2	1	2
Canada	1	1	2	2	1	1
Korea, Republic of	2	2	3	2	1	1
Others	2	1	2	2	0	0
<b>Total Foreign</b>	413	630	537	956	835	963
<b>United States</b>	8,191	8,763	10,004	9,348	7,800	7,000
<b>Total</b>	8,604	9,393	10,541	10,304	8,635	7,963
<b>Total Exports</b>						
Canada	8,215	8,777	10,032	9,357	7,800	7,000
China, Peoples Republic of	1,769	1,723	1,609	1,645	1,400	1,700
EU-27	637	967	901	1,554	1,000	1,200
Russian Federation	0	0	1	0	0	1
Others	3	0	3	1	0	0
<b>Total Foreign</b>	10,624	11,467	12,546	12,557	10,200	9,901
<b>United States</b>	154	165	137	98	170	55
<b>Total</b>	10,778	11,632	12,683	12,655	10,370	9,956

Source: USDA-FAS attache reports, official statistics, and results of office research.

Notes: 1/ From 2008, the Philippines and Vietnam are no longer included in the swine PSD.

2/ From 2009, Chile is no longer included in the swine PSD.

Data for 2008 is preliminary. Data for 2009 is forecast.

## Notes to Readers

The *Livestock and Poultry: World Markets and Trade* circular is designed to give a snapshot of the current situation among the major players in world beef, pork, broiler meat, and turkey meat trade. Summary tables for meat production, imports, exports, and consumption provide an overview of the situation.

### Data Modifications

Based on new information, the following countries have significant historical (pre-2007) changes to the PSD:

#### **Cattle/Beef:**

- India and Nicaragua

#### **Broiler Meat:**

- Guatemala

### Conversion Rates

	<b>Beef/Veal</b>	<b>Pork</b>
<b>Conversion Rate</b>	1.40	1.30
<b>HS Codes</b>	Fresh/Chilled: 0201 Frozen: 0202 Processed: 021020 & 160250	Fresh/Chilled: 020311, 020312, 020319 Frozen: 020321, 020322, 020329 Processed: 021011, 021012, 021019, 160241, 160242, 160249

#### Beef/Veal Exceptions:

- **Argentina, Brazil, Uruguay:**  
Exports: 0201, 0202 – 1.40; 021020 and 160250 - 1.79.  
Imports: 1.40 for ALL beef/veal codes
- **EU:**  
Exports and Imports: 0201, 0202 – 1.40; 021020 and 160250 - 1.79.
- **Canada, Japan:**  
Exports: 1.40 for ALL beef/veal codes  
Imports: 0201, 0202 – 1.40; 021020 and 160250 - 1.79

	<b>Broiler</b>	<b>Turkey and Other Poultry</b>
<b>Conversion Rate</b>	1	1
<b>HS Codes</b>	Fresh/Chilled: 0207.11, 0207.13 Frozen: 0207.12, 0207.14 Processed and Salted: 1602.32, 0210.99	Fresh/Chilled: 0207.24, 0207.26, 0207.32, 0207.34, 0207.35 Frozen: 0207.25, 0207.27, 0207.33, 0207.36 Processed: 1602.31

#### Broiler/Turkey Exceptions:

- **U.S., Brazil, and Argentina (1997-2004):**  
Chicken Paw Exports Excluded using -  
Hong Kong Imports/Exports: 02071410  
China Imports: 02071422  
U.S. Exports: 0207140045

- **Argentina (2005 to present):**  
Exports exclude Argentina Paw Exports using Argentina Government sources.
- **China:**  
Imports include Hong Kong Broiler Meat Exports.
- **Hong Kong:**  
Excludes re-exports of Broiler Meat.
- **Canada:**  
Imports exclude Spent Hens: 0207131000, 0207111000, 0207141000, 0207141010, 0207141020, 0207141030, 0207141049, 0207141090, 1602321110, and 1602329220.
- **EU-27:**  
Imports include Salted Poultry from South America and Thailand: 02109939.
- **Mexico:**  
Imports include Meat Sausage: 160232 and 1601000020

### Assumptions

- **BSE:** Forecasts assume a continuation of trade policies due to BSE (bovine spongiform encephalopathy) currently in place by U.S. and Canadian trading partners as of April 9, 2009.
- **AI:** Poultry trade forecasts reflect policies currently in place as a result of outbreaks of avian influenza (AI) as of April 9, 2009.
- **FMD:** Forecasts reflect the status of the foot and mouth disease (FMD) situation in Brazil as of April 9, 2009 and any resulting trade restrictions.

### Technical Notes

**Turkey Meat:** Turkey meat summary tables are included in the circular for the convenience of readers but have not been revised since the October 2008 release. The turkey meat data series is only revised annually.

**CWE/PWE:** All quantities (beef and pork) noted are in Carcass Weight Equivalent (CWE) unless otherwise noted as Product Weight Equivalent (PWE). CWE is the weight of an animal after slaughter and removal of most internal organs, head, and skin. PWE is the actual weight of the meat product exported.

**Per Capita Consumption:** The Per Capita Consumption tables are only published with the October circular. However, tables can be replicated/updated using “Domestic Consumption” data in the PSD and Census population data. Census population data is available in Excel format from USDA-Economic Research Service at <http://www.ers.usda.gov/Data/Macroeconomics/>.

### FAS Reports from Overseas Offices

The *Livestock and Poultry: World Markets and Trade* circular is based on post reports submitted since March 2009 and on available secondary information. The individual country reports can be obtained on FAS Online at: <http://www.fas.usda.gov/scriptsw/attacherep/default.asp>.

### PSD Online

The entire USDA PSD database is available electronically on PSD Online. Users can use this system to generate the full set of PSD data for those countries reporting. PSD Online can be reached through <http://www.fas.usda.gov/psdonline/psdHome.aspx>.

## Additional Resources

Please refer to the USDA-FAS Dairy, Livestock and Poultry website at:  
[http://www.fas.usda.gov/dlp/livestock\\_poultry.asp](http://www.fas.usda.gov/dlp/livestock_poultry.asp) for additional data and analysis.

Additional information on international trade of agricultural products can be found at:  
<http://www.fas.usda.gov>.

Situation and outlook information on the U.S. livestock and poultry industry can be obtained from the USDA-Economic Research Service at:  
<http://www.ers.usda.gov/Publications/LDP/>.

## Future Releases and Contact Information

Please visit [http://www.fas.usda.gov/dlp/livestock\\_poultry.asp](http://www.fas.usda.gov/dlp/livestock_poultry.asp) to view archived and future releases of “Livestock and Poultry: World Markets and Trade”. The next release of this circular will be in October 2009.

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