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Livestock and Poultry: World Markets and Trade

2010 Trade Forecast Revision: Pork Higher; Beef and Broiler Meat Stable

World trade in beef remains virtually unchanged from the October forecast. Despite robust demand in most markets due to global economic recovery, tight exportable supplies continue to limit import growth. Stronger than expected economic recovery in Asia will bolster demand in key markets such as South Korea, Hong Kong and Japan – benefiting U.S. exports which are revised upward. U.S. imports are forecast lower, despite tighter domestic supplies, as Asian markets will likely bid aggressively for Oceania and Uruguayan product. Russian imports are raised on stronger demand and an expected higher quota exemption. Brazil, Paraguay, and Uruguay, will benefit from the Russian boost, as well as the continued forecast reduction in Argentine exports.

World trade in pork is raised slightly. Stronger demand from Asia, particularly China and Hong Kong, is expected in the second half of 2010 as economic conditions improve. Chinese imports will also be facilitated by the lifting of H1N1-related trade bans. Russian imports are revised upwards despite a lower tariff rate quota volume. High domestic prices spurred by tight supplies of animal protein are expected to encourage trade outside the quota. Greater exports from the EU and Brazil are expected as they are poised to take advantage of strong Asian and Russian demand. Some additional EU pork shipments will likely replace live swine exports. The United States will benefit from stronger Mexican demand, although tight domestic supplies and weaker demand from Japan and South Korea are expected to constrain overall export growth.

World trade in broiler meat remains fairly stable. The December announcement of an 18 percent decline in the Russian 2010 tariff rate quota (TRQ) volume resulted in a downward revision in its import forecast, which in October had been based on higher 2009 TRQ level. Import estimates for some smaller, non-traditional markets, particularly in the Middle East and Africa, are lower. Iraqi imports are revised upward despite expanding production. Higher EU exports are expected based on stronger demand in Asian and Middle Eastern markets. U.S. exports are lower based mainly on the 20 percent reduction of its Russian TRQ allocation to 600,000 tons and weaker demand from several other markets.

Note: Data in this document reflects the PSD (http://www.fas.usda.gov/psdonline) and WASDE release of April 9, 2010.

Approved by the World Agricultural Outlook Board/USDA

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Contents

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

	2005	2006	2007	2008	2009 (p)	2010 (f)	Percent Change 2009 to 2010
Production							
Beef and Veal /1	56,229	57,441	58,314	58,105	57,017	56,625	-0.7%
Pork /1	94,328	96,026	94,585	98,528	100,780	102,412	1.6%
Broiler and Turkey /2	68,062	69,292	73,434	76,817	76,795	78,910	2.8%
Total	218,619	222,759	226,333	233,450	234,592	237,947	1.4%
Consumption							
Beef and Veal /1	55,792	56,684	57,831	57,452	56,365	56,145	-0.4%
Pork /1	93,956	95,793	94,434	98,356	100,542	102,148	1.6%
Broiler & Turkey /2	67,343	69,082	73,100	75,862	75,981	78,153	2.9%
Total	217,091	221,559	225,365	231,670	232,888	236,446	1.5%
Imports							
Beef and Veal /1	6,800	6,815	7,160	6,870	6,616	6,718	1.5%
Pork /1	4,740	4,922	5,087	5,916	5,434	5,521	1.6%
Broiler and Turkey /2	6,705	6,846	7,561	8,268	7,975	8,016	0.5%
Total	18,245	18,583	19,808	21,054	20,025	20,255	1.1%
Exports							
Beef and Veal /1	7,314	7,502	7,570	7,489	7,267	7,257	-0.1%
Pork /1	5,006	5,225	5,162	6,149	5,656	5,881	4.0%
Broiler and Turkey /2	7,432	7,116	7,961	9,069	8,987	8,729	-2.9%
Total	19,752	19,843	20,693	22,707	21,910	21,867	-0.2%
U.S. Exports							
Beef and Veal /1	316	519	650	856	848	930	9.7%
Pork /1	1,209	1,359	1,425	2,117	1,872	1,978	5.7%
Broiler and Turkey /2	2,618	2,609	2,926	3,464	3,342	2,889	-13.6%
Total	4,143	4,487	5,001	6,437	6,062	5,797	-4.4%
U.S. Market Share (%) of Exports Among Major Traders							**Change in Market Share Points**
Beef and Veal /1	4%	7%	9%	11%	12%	13%	1%
Pork /1	24%	26%	28%	34%	33%	34%	1%
Broiler and Turkey /2	35%	37%	37%	38%	37%	33%	-4%
Combined	21%	23%	24%	28%	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: 2010 REVISED FORECAST OVERVIEW

World Production Virtually Unchanged; Marked by Tight Supplies

The beef production forecasts for both the **United States** and **Mexico** are revised higher from October on increased slaughter. U.S. production is raised on continued liquidation and imports of Canadian cows for slaughter. Mexico is also boosted by an upward revision in weights largely as yields at federally inspected facilities are expected to improve. Production in **Paraguay** and **Uruguay** is forecast higher on robust export demand as competitor (Argentina) supplies remain constrained.

Continued herd decline in **Canada** is now expected to dampen slaughter, generating a downward revision in production. **EU** production is forecast lower as the calf crops in recent years were revised downward reducing cattle inventories.

Revisions in the historical cattle and beef production series for **Egypt** and **Venezuela** resulted in forecast modifications. Also, the data series now includes cattle for Venezuela.

Demand Remains Strong; Tight Exportable Supplies Continue to Limit Growth

Imports

Major markets **Russia**, **South Korea**, **Hong Kong**, **Japan**, and **Malaysia** are all revised upward. Stronger than expected economic recovery will bolster demand, particularly in Asia.

U.S. and **Canadian** imports are forecast lower, despite tighter domestic supplies, as Asian markets will likely bid aggressively for Oceania and Uruguayan product. Although demand in the Middle East and Africa is still forecast to recover from recession, the forecast for **Angola** is dropped as trade in the prior year was not as strong as previously expected.

United Arab Emirates is revised down due to a modification in trade estimates from 2007 onward.

Exports

Brazil is revised downward while **Paraguay** and **Uruguay** are forecast to expand. While all three should benefit from constrained Argentine exportable supplies, Paraguay and Uruguay are now expected to reap greater benefits than previously forecasted on demand in Russia and the EU.

Columbia is revised downward as trade with Venezuela remains at a standstill with no other significant market opportunities on the horizon. **India** is revised downward as exports have been weaker than previously expected.

U.S. exports are revised upward mirroring the improved outlook for Asian demand.

PORK: 2010 REVISED GLOBAL FORECAST OVERVIEW

Global Production Virtually Unchanged

A slight upward revision in **Chinese** pork production from October's forecast is supported by high swine and sow inventories as well as improved genetics and production practices. Some government subsidies continue to encourage producers. **South Korea** is boosted as smaller operators return to production, encouraged by lower feed grain prices.

Production is revised downwards for **Russia** as a substantial reduction in live swine imports will shrink the inventories of animals available for slaughter. Despite strong government and market incentives, investors remain somewhat reluctant to expand production more aggressively.

Global Imports Higher as Demand Strengthens in China, Mexico, and Russia

Although **Chinese** imports in the first half of the year may be limited by low-priced, abundant domestic supplies, they are expected to pick up in the second half of 2010 as demand grows due to improving economic conditions. The upward revision will also be facilitated by the lifting of H1N1-related trade bans.

Greater **Mexican** imports are expected as domestic production is unable to meet the rising demand from the meat processing sector. **Russia** is revised upwards despite the announcement of a lower 2010 quota volume than what was assumed in October. Higher domestic prices spurred by tight supplies of animal protein are expected to encourage imports outside the quota.

South Korea and **Japan** are cut as demand is met by expanding domestic production. However, while the consumption forecast is revised upward for South Korea, it is lowered for Japan on increased competition from lower-priced animal proteins (poultry, ground beef).

Global Exports Up as EU and Brazil Capture Rising Asian and Russian Demand

EU exports are raised sharply on growth in Asia and Russia – where higher tariffs on live swine will result in a shift to greater pork imports. **Brazil** is revised significantly higher as demand in existing markets remains firm and trade develops with Asian markets, particularly China.

The **United States'** forecast is reduced from October due to tight domestic supplies and weaker demand from Japan and South Korea.

BROILER MEAT: 2010 REVISED FORECAST OVERVIEW

World Production and Trade Virtually Unchanged

Production

Mexico's broiler meat production forecast is revised lower compared to the October forecast due to increased competition from imports of competitively priced U.S. chicken leg quarters and higher production costs as a result of domestic fiscal policy changes.

China and **Argentina** are revised upward on stronger domestic demand. Despite rising grain prices in China, improved profits due to higher poultry prices are forecast to encourage expansion. Argentine poultry production is forecast higher on unmet animal protein demand constrained by continuing tight beef supplies. The **EU** and the **United States** are revised higher on lower grain prices. The EU will also benefit from strong exports. The United States is also revised upward as industry responds to strong demand. **Iraqi** production is boosted on expected abundant domestic feed grain supplies.

Revisions in historical **Kazakhstan** production estimates resulted in a forecast increase.

Imports

Major policy announcements by **Russia** and **Kazakhstan** since the October forecast spurred significant adjustments in their imports. The December announcement by Russia of an 18 percent decline in the 2010 tariff rate quota (TRQ) volume resulted in a downward revision in its import forecast, which had been previously based on the higher 2009 TRQ level. Similarly, Kazakhstan announced, in February, that its new poultry TRQ will be capped at 110,000 tons in 2010.

Trade estimates for some smaller markets particularly, in the Middle East and Africa, are dropped as consumption was not as resilient during the global recession as previously expected. Key developing markets **Angola**, **Saudi Arabia** and **Jordan** are revised significantly lower. Forecasts for **Cuba** and **Venezuela** are each slashed nearly 25 percent on deteriorating macroeconomic conditions. Venezuela has been adversely impacted by weaker oil prices and Cuba by reduced tourism and remittances.

Iraqi imports are revised upward as robust consumption growth is unmet by production expansion. Increasing stability is expected to contribute to long-term consumption prospects.

Exports

U.S. exports are lower based mainly on the 20 percent reduction of its Russian TRQ allocation (to 600,000 tons) and weaker demand from several other markets.

Despite strong competition in world markets, the **EU** is forecast to benefit from a more competitive exchange rate although exports to Russia will be constrained by their TRQ allocation.

Beef and Veal Selected Countries

1,000 Metric Tons (Carcass Weight Equivalent)

	2006	2007	2008	2009	2010 Oct	2010 Apr
Production						
Brazil	9,025	9,303	9,024	8,935	9,290	9,300
EU-27	8,150	8,188	8,090	7,970	7,950	7,920
China	5,767	6,134	6,132	5,764	5,530	5,550
Argentina	3,100	3,300	3,150	3,400	2,800	2,800
India	2,375	2,413	2,525	2,610	2,795	2,760
Australia	2,183	2,172	2,159	2,100	2,075	2,075
Mexico	1,550	1,600	1,667	1,700	1,630	1,735
Russia	1,430	1,370	1,315	1,285	1,265	1,260
Pakistan	1,057	1,113	1,168	1,226	1,250	1,250
Canada	1,329	1,278	1,288	1,245	1,275	1,225
Others	9,495	9,347	9,424	8,893	8,914	8,961
Total Foreign	45,461	46,218	45,942	45,128	44,774	44,836
United States	11,980	12,096	12,163	11,889	11,631	11,789
Total	57,441	58,314	58,105	57,017	56,405	56,625
Total Dom. Consumption						
EU-27	8,649	8,690	8,352	8,317	8,280	8,270
Brazil	6,969	7,144	7,252	7,374	7,445	7,520
China	5,692	6,065	6,080	5,746	5,530	5,547
Argentina	2,553	2,771	2,732	2,749	2,420	2,430
Russia	2,361	2,392	2,441	2,172	2,033	2,157
India	1,694	1,735	1,853	2,020	2,095	2,135
Mexico	1,894	1,961	2,033	1,971	1,920	2,020
Pakistan	1,090	1,132	1,174	1,230	1,256	1,254
Japan	1,159	1,182	1,173	1,210	1,195	1,212
Canada	1,023	1,068	1,035	1,010	1,090	1,000
Others	10,767	10,862	10,875	10,298	10,550	10,520
Total Foreign	43,851	45,002	45,000	44,097	43,814	44,065
United States	12,833	12,829	12,452	12,268	12,158	12,080
Total	56,684	57,831	57,452	56,365	55,972	56,145

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 excluded.
3/ Data for 2009 is preliminary. Data for 2010 is forecast.

Beef and Veal Selected Countries Summary

1,000 Metric Tons (Carcass Weight Equivalent)

	2006	2007	2008	2009	2010 Oct	2010 Apr
Total Imports						
Russia	939	1,030	1,137	895	780	905
Japan	678	686	659	697	678	702
EU-27	717	642	466	495	490	500
Mexico	383	403	408	322	335	340
Korea, South	298	308	295	315	295	325
Vietnam	29	90	200	250	300	275
Canada	180	242	230	247	290	265
Egypt	292	293	166	180	175	190
Hong Kong	89	90	118	154	155	185
Chile	124	151	129	166	155	170
Others	1,687	1,841	1,911	1,703	1,700	1,654
Total Foreign	5,416	5,776	5,719	5,424	5,353	5,511
United States	1,399	1,384	1,151	1,192	1,304	1,207
Total	6,815	7,160	6,870	6,616	6,657	6,718
Total Exports						
Brazil	2,084	2,189	1,801	1,596	1,870	1,825
Australia	1,430	1,400	1,407	1,364	1,350	1,350
India	681	678	672	590	700	625
New Zealand	530	496	533	514	517	510
Canada	477	457	494	480	490	490
Uruguay	460	385	361	370	360	410
Argentina	552	534	422	653	390	380
Paraguay	240	206	233	254	230	280
EU-27	218	140	204	148	160	150
Nicaragua	68	83	89	101	95	105
Others	243	352	417	349	207	202
Total Foreign	6,983	6,920	6,633	6,419	6,369	6,327
United States	519	650	856	848	837	930
Total	7,502	7,570	7,489	7,267	7,206	7,257

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 excluded.
3/ Data for 2009 is preliminary. Data for 2010 is forecast.

Pork Selected Countries Summary

1,000 Metric Tons (Carcass Weight Equivalent)

	2006	2007	2008	2009	2010 Oct	2010 Apr
Production						
China	46,505	42,878	46,205	48,890	50,300	50,600
EU-27	21,791	22,858	22,596	22,060	21,900	22,000
Brazil	2,830	2,990	3,015	3,130	3,249	3,250
Russia	1,805	1,910	2,060	2,200	2,290	2,250
Vietnam	1,713	1,832	1,850	1,850	1,850	1,850
Canada	1,748	1,746	1,786	1,790	1,660	1,740
Japan	1,247	1,250	1,249	1,310	1,270	1,300
Philippines	1,215	1,250	1,225	1,225	1,225	1,225
Mexico	1,109	1,152	1,161	1,162	1,175	1,166
Korea, South	1,000	1,043	1,056	1,062	1,009	1,100
Others	5,504	5,714	5,726	5,662	5,770	5,793
Total Foreign	86,467	84,623	87,929	90,341	91,698	92,274
United States	9,559	9,962	10,599	10,439	10,185	10,138
Total	96,026	94,585	98,528	100,780	101,883	102,412
Total Dom. Consumption						
China	46,051	42,726	46,413	48,732	50,300	50,560
EU-27	20,631	21,507	21,024	20,683	20,750	20,625
Russia	2,639	2,803	3,112	3,044	3,039	3,059
Brazil	2,191	2,260	2,390	2,423	2,549	2,460
Japan	2,452	2,473	2,486	2,467	2,487	2,457
Vietnam	1,731	1,855	1,880	1,876	1,889	1,877
Mexico	1,489	1,523	1,605	1,770	1,700	1,786
Korea, South	1,420	1,502	1,519	1,480	1,430	1,500
Philippines	1,239	1,275	1,270	1,283	1,268	1,290
Taiwan	928	926	945	968	963	973
Others	6,379	6,619	6,906	6,821	6,935	7,013
Total Foreign	87,150	85,469	89,550	91,547	93,310	93,600
United States	8,643	8,965	8,806	8,995	8,557	8,548
Total	95,793	94,434	98,356	100,542	101,867	102,148

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

Notes: 1/ Data for 2009 is preliminary. Data for 2010 is forecast.

Pork Selected Countries Summary

1,000 Metric Tons (Carcass Weight Equivalent)

	2006	2007	2008	2009	2010 Oct	2010 Apr
Total Imports						
Japan	1,154	1,210	1,267	1,138	1,210	1,151
Russia	835	894	1,053	845	750	810
Mexico	446	451	535	678	620	700
Hong Kong	277	302	346	369	348	370
Korea, South	410	447	430	390	400	343
Canada	146	171	194	180	200	210
China	90	198	431	194	120	200
Ukraine	62	82	238	186	200	200
Australia	109	141	152	176	175	175
Singapore	98	97	91	97	102	100
Others	846	655	802	803	897	881
Total Foreign	4,473	4,648	5,539	5,056	5,022	5,140
United States	449	439	377	378	390	381
Total	4,922	5,087	5,916	5,434	5,412	5,521
Total Exports						
EU-27	1,285	1,286	1,727	1,415	1,200	1,425
Canada	1,081	1,033	1,129	1,123	1,100	1,130
Brazil	639	730	625	707	700	790
China	544	350	223	232	240	240
Chile	130	148	142	152	150	155
Mexico	66	80	91	70	95	80
Australia	60	54	48	40	48	46
Vietnam	20	19	11	13	11	13
Croatia	2	2	3	4	6	5
Norway	6	2	1	3	4	4
Others	33	33	32	25	36	15
Total Foreign	3,866	3,737	4,032	3,784	3,590	3,903
United States	1,359	1,425	2,117	1,872	2,018	1,978
Total	5,225	5,162	6,149	5,656	5,608	5,881

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

Notes: 1/ Data for 2009 is preliminary. Data for 2010 is forecast.

Broiler Meat Selected Countries Summary

1,000 Metric Tons (Ready to Cook Equivalent)

	2006	2007	2008	2009	2010 Oct	2010 Apr
Production						
China	10,350	11,291	11,840	12,100	12,500	12,550
Brazil	9,355	10,305	11,033	11,023	11,420	11,420
EU-27	7,740	8,320	8,594	8,660	8,650	8,700
Mexico	2,592	2,683	2,853	2,789	2,880	2,792
India	2,000	2,240	2,490	2,550	2,650	2,650
Russia	1,180	1,350	1,550	1,772	1,975	1,975
Argentina	1,200	1,320	1,430	1,500	1,600	1,650
Iran	1,327	1,423	1,450	1,525	1,600	1,600
Japan	1,258	1,250	1,255	1,255	1,255	1,265
Thailand	1,100	1,050	1,170	1,200	1,250	1,240
Others	10,297	10,839	11,256	11,451	11,736	11,781
Total Foreign	48,399	52,071	54,921	55,825	57,516	57,623
United States	15,930	16,226	16,561	15,935	16,222	16,300
Total	64,329	68,297	71,482	71,760	73,738	73,923
Total Dom. Consumption						
China	10,371	11,415	11,954	12,210	12,606	12,675
EU-27	7,656	8,358	8,564	8,589	8,640	8,650
Brazil	6,853	7,384	7,792	7,802	8,076	8,071
Mexico	3,010	3,061	3,281	3,272	3,377	3,307
Russia	2,373	2,578	2,695	2,700	2,795	2,710
India	2,000	2,239	2,489	2,549	2,649	2,649
Japan	1,970	1,945	1,926	1,951	1,960	1,955
Iran	1,326	1,464	1,460	1,536	1,614	1,611
Argentina	1,109	1,200	1,270	1,327	1,400	1,450
South Africa	1,202	1,240	1,341	1,371	1,424	1,412
Others	12,677	13,622	14,570	14,825	15,211	15,209
Total Foreign	50,547	54,506	57,342	58,132	59,752	59,699
United States	13,671	13,582	13,428	12,933	13,402	13,661
Total	64,218	68,088	70,770	71,065	73,154	73,360

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

Notes: 1/ Chicken paws are excluded.
2/ Data for 2009 is preliminary. Data for 2010 is forecast.

Broiler Meat Selected Countries Summary

1,000 Metric Tons (Ready to Cook Equivalent)

	2006	2007	2008	2009	2010 Oct	2010 Apr
Total Imports						
Russia	1,189	1,222	1,159	913	820	745
EU-27	605	673	712	712	710	720
Japan	716	696	737	645	680	695
Saudi Arabia	423	470	510	604	650	625
Mexico	419	380	433	492	505	525
China	343	482	399	401	360	425
Iraq	119	176	211	368	290	375
United Arab Emirates	182	238	289	297	290	297
Hong Kong	243	215	236	253	260	260
Kuwait	109	145	196	226	225	230
Others	2,006	2,360	2,871	2,664	2,888	2,712
Total Foreign	6,354	7,057	7,753	7,575	7,678	7,609
United States	21	28	36	39	36	44
Total	6,375	7,085	7,789	7,614	7,714	7,653
Total Exports						
Brazil	2,502	2,922	3,242	3,222	3,345	3,350
EU-27	689	635	742	783	720	770
Thailand	261	296	383	379	420	410
China	322	358	285	291	254	300
Argentina	94	125	164	178	204	204
Canada	110	139	152	147	153	153
Chile	64	39	63	87	125	90
Kuwait	38	60	70	70	70	70
Australia	16	25	27	30	40	33
United Arab Emirates	10	30	30	30	30	30
Others	85	74	98	133	120	130
Total Foreign	4,191	4,703	5,256	5,350	5,481	5,540
United States	2,361	2,678	3,157	3,100	2,858	2,642
Total	6,552	7,381	8,413	8,450	8,339	8,182

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

Notes: 1/ Chicken paws are excluded.
2/ Data for 2009 is preliminary. Data for 2010 is forecast.

Turkey Meat Selected Countries Summary

1,000 Metric Tons (Ready to Cook Equivalent)

	2005	2006	2007	2008	2009	2010 Oct
Production						
EU-27	1,919	1,858	1,790	1,830	1,820	1,815
Brazil	360	353	458	438	437	480
Canada	155	163	169	180	170	180
Russia	17	19	25	35	40	45
Mexico	14	14	15	15	15	15
South Africa	5	5	7	7	8	8
China	4	4	5	5	5	6
Others	4	4	4	nr	nr	nr
Total Foreign	2,478	2,420	2,473	2,510	2,495	2,549
United States	2,464	2,543	2,664	2,796	2,567	2,607
Total	4,942	4,963	5,137	5,306	5,062	5,156
Total Dom. Consumption						
EU-27	1,888	1,841	1,769	1,835	1,830	1,830
Brazil	199	197	281	234	274	305
Mexico	197	200	213	219	185	205
Canada	143	144	149	163	156	163
Russia	124	110	100	103	85	95
South Africa	30	39	47	38	33	38
China	16	21	35	50	30	31
Others	22	23	23	nr	nr	nr
Total Foreign	2,619	2,575	2,617	2,642	2,593	2,667
United States	2,246	2,295	2,401	2,431	2,348	2,381
Total	4,865	4,870	5,018	5,073	4,941	5,048

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

Notes: 1/ From 2008, Taiwan is excluded.
2/ 'nr' = 'no data'.
3/ Data for 2009 is preliminary. Data for 2010 is forecast.

Turkey Meat Selected Countries Summary

1,000 Metric Tons (Ready to Cook Equivalent)

	2005	2006	2007	2008	2009	2010 Oct
Total Imports						
Mexico	185	189	202	204	170	190
EU-27	128	113	103	125	120	120
Russia	107	91	75	68	45	50
South Africa	25	34	40	31	25	30
China	12	17	30	45	25	25
Canada	12	9	9	9	9	9
Others	18	19	19	0	0	0
Total Foreign	487	472	478	482	394	424
United States	3	5	4	4	6	5
Total	490	477	482	486	400	429
Total Exports						
Brazil	161	156	177	204	163	175
EU-27	159	130	124	120	110	105
Canada	24	27	27	25	24	24
Others	2	3	4	0	0	0
Total Foreign	346	316	332	349	297	304
United States	258	248	248	307	235	247
Total	604	564	580	656	532	551

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

Notes: 1/ From 2008, Taiwan is excluded.
2/ Data for 2009 is preliminary. Data for 2010 is forecast.

Cattle Selected Countries Summary

(in 1,000 head)

	2006	2007	2008	2009	2010 Oct	2010 Apr
Total Cattle Beg. Stks						
India	282,300	282,000	281,700	281,400	281,100	281,100
Brazil	172,111	173,830	175,437	179,540	185,243	185,325
China	109,908	104,651	105,948	105,722	104,900	104,916
EU-27	89,672	88,463	89,043	88,837	88,630	88,400
Argentina	54,266	55,664	55,662	54,260	50,158	49,858
Colombia	28,452	29,262	30,095	30,775	31,167	31,171
Australia	27,782	28,400	28,040	27,321	27,436	27,007
Mexico	23,669	23,316	22,850	22,666	22,168	22,092
Russia	19,850	19,000	18,370	17,900	17,464	17,499
Venezuela	14,232	13,831	13,515	13,269	nr	13,109
Others	89,740	88,617	82,489	71,768	55,424	53,411
Total Foreign	911,982	907,034	903,149	893,458	863,690	873,888
United States	96,342	96,573	96,035	94,521	93,000	93,701
Total	1,008,324	1,003,607	999,184	987,979	956,690	967,589
Production (Calf Crop)						
India	57,000	57,000	57,450	57,960	58,300	58,300
Brazil	48,188	48,845	49,050	49,150	50,937	49,400
China	39,827	45,353	45,360	42,572	41,500	41,000
EU-27	30,625	31,500	30,850	30,400	30,300	30,150
Argentina	15,800	15,900	14,900	12,300	13,000	13,200
Australia	10,104	9,369	9,079	9,213	10,185	10,158
Russia	7,505	7,310	7,100	7,010	6,810	6,970
Mexico	6,925	6,732	6,754	6,775	6,797	6,797
Colombia	5,740	5,750	5,670	5,675	5,675	5,675
Canada	5,347	5,540	5,288	5,110	5,050	4,980
Others	25,499	24,660	23,526	19,684	14,390	14,964
Total Foreign	252,560	257,959	255,027	245,849	242,944	241,594
United States	37,016	36,759	36,153	35,819	35,000	35,300
Total	289,576	294,718	291,180	281,668	277,944	276,894

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

Notes: 1/ May contain other bovines.
2/ From 2008, Philippines is excluded.
From 2009, Turkey is excluded.
From 2010, Nicaragua and South Africa are excluded.
3/ Venezuela was excluded from the 2010 forecast released October 2009.
4/ Data for 2009 is preliminary. Data for 2010 is forecast.

Cattle Selected Countries Summary

(in 1,000 head)

	2006	2007	2008	2009	2010 Oct	2010 Apr
Total Imports						
Brazil	2	10	70	520	40	573
Venezuela	249	384	304	415	nr	525
Egypt	19	30	17	45	40	55
China	15	15	15	43	21	54
Canada	38	54	49	54	50	50
Russia	58	75	58	49	35	49
Mexico	72	81	90	20	25	25
Japan	26	25	20	16	17	16
EU-27	4	4	4	5	4	5
Ukraine	1	4	3	3	3	3
Others	274	218	131	101	0	0
Total Foreign	758	900	761	1,271	235	1,355
United States	2,289	2,495	2,284	2,002	2,200	2,150
Total	3,047	3,395	3,045	3,273	2,435	3,505
Total Exports						
Canada	1,032	1,412	1,598	1,067	1,200	1,150
Mexico	1,275	1,089	738	980	1,000	1,000
Australia	634	719	869	946	910	915
Brazil	246	438	414	530	620	590
EU-27	469	387	376	403	350	400
Uruguay	99	46	169	235	250	250
China	54	51	33	29	28	27
New Zealand	32	28	17	13	12	13
Argentina	2	2	2	2	2	2
Ukraine	7	1	2	2	2	2
Others	285	227	96	111	2	2
Total Foreign	4,135	4,400	4,314	4,318	4,376	4,351
United States	50	66	107	58	65	65
Total	4,185	4,466	4,421	4,376	4,441	4,416

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

Notes: 1/ May contain other bovines.
2/ From 2008, Philippines is excluded.
From 2009, Turkey is excluded.
From 2010, Nicaragua and South Africa are excluded.
3/ Venezuela was excluded from the 2010 forecast released October 2009.
4/ Data for 2009 is preliminary. Data for 2010 is forecast.

Swine Selected Countries Summary

(in 1,000 head)

	2006	2007	2008	2009	2010 Oct	2010 Apr
Total Beginning Stocks						
China	433,191	418,504	439,895	462,913	485,005	469,000
EU-27	159,115	161,526	159,732	153,067	149,250	149,000
Brazil	32,938	33,147	32,947	33,892	35,122	35,122
Russia	16,550	17,180	18,187	19,562	20,230	20,240
Canada	15,110	14,907	13,810	12,180	10,632	11,630
Mexico	8,911	9,021	9,401	9,912	9,500	10,459
Japan	9,620	9,759	9,745	9,899	9,900	10,000
Korea, South	8,098	8,518	8,742	8,223	8,200	8,721
Ukraine	7,052	8,055	7,020	6,526	7,150	7,150
Australia	2,538	2,733	2,605	2,412	2,200	2,236
Others	50,013	51,522	2,398	nr	nr	nr
Total Foreign	743,136	734,872	704,482	718,586	737,189	723,558
United States	61,463	62,516	68,177	67,148	65,150	65,327
Total	804,599	797,388	772,659	785,734	802,339	788,885
Production (Pig Crop)						
China	605,823	592,080	636,817	651,682	668,500	668,500
EU-27	259,158	265,100	258,400	254,500	256,000	256,000
Russia	37,000	39,150	41,760	43,300	44,750	44,750
Brazil	33,304	34,530	34,845	35,890	37,265	37,265
Canada	32,278	31,835	31,085	29,151	26,850	27,900
Japan	16,950	17,050	16,960	17,700	17,100	17,500
Mexico	15,700	15,767	15,924	15,966	15,775	16,007
Korea, South	13,943	14,422	13,792	14,916	13,630	15,079
Ukraine	7,543	6,986	6,619	6,600	7,000	7,000
Australia	5,301	5,480	4,477	4,609	4,825	4,900
Others	81,461	84,356	5,030	nr	nr	nr
Total Foreign	1,108,461	1,106,756	1,065,709	1,074,314	1,091,695	1,094,901
United States	105,633	112,873	115,030	115,115	114,850	113,278
Total	1,214,094	1,219,629	1,180,739	1,189,429	1,206,545	1,208,179

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

Notes: 1/ nr = no record
2/ From 2008, the Philippines, Taiwan, and Vietnam are excluded.
From 2009, Chile is excluded.
3/ Data for 2009 is preliminary. Data for 2010 is forecast.

Swine Selected Countries Summary

(in 1,000 head)

	2006	2007	2008	2009	2010 Oct	2010 Apr
Total Imports						
Russia	382	377	770	1,202	1,150	500
Ukraine	40	12	86	77	80	80
Mexico	196	136	80	7	15	10
China	2	3	12	6	4	5
EU-27	6	2	2	3	2	3
Canada	1	2	2	3	2	2
Korea, South	2	3	2	0	1	2
Japan	0	0	0	1	0	1
Others	1	2	2	0	0	0
Total Foreign	630	537	956	1,299	1,254	603
United States	8,763	10,004	9,348	6,365	5,600	6,000
Total	9,393	10,541	10,304	7,664	6,854	6,603
Total Exports						
Canada	8,777	10,032	9,357	6,376	5,600	6,000
China	1,723	1,609	1,645	1,602	1,740	1,660
EU-27	967	901	1,508	2,210	2,400	1,500
Brazil	0	3	1	1	0	1
Russia	0	1	0	1	0	1
Others	0	0	0	0	0	0
Total Foreign	11,467	12,546	12,511	10,190	9,740	9,162
United States	165	137	97	21	20	20
Total	11,632	12,683	12,608	10,211	9,760	9,182

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

Notes: 1/ From 2008, the Philippines, Taiwan, and Vietnam are excluded.
From 2009, Chile is excluded.
2/ Data for 2009 is preliminary. Data for 2010 is forecast.

Beef and Veal: Per Capita Consumption

Kilograms Per Person

	2006	2007	2008	2009	Oct 2010	Apr 2010
Per Capita Consumption						
Argentina	64.4	69.2	67.5	67.2	58.5	58.8
Australia	36.5	34.7	35.0	35.0	35.1	35.1
Brazil	36.4	36.8	36.9	37.1	37.0	37.4
Canada	31.3	32.4	31.2	30.2	32.3	29.6
Chile	21.6	23.2	22.2	24.6	24.1	24.9
China	4.3	4.6	4.6	4.3	4.1	4.1
Colombia	17.6	16.0	14.6	17.3	18.0	18.4
EU-27	17.7	17.7	17.0	16.9	16.8	16.8
Egypt	9.6	8.2	6.3	6.4	7.5	6.4
Hong Kong	14.8	15.0	18.9	24.0	24.0	28.2
India	1.5	1.5	1.6	1.7	1.8	1.8
Iran	6.8	7.2	7.6	7.6	7.6	7.6
Japan	9.1	9.3	9.2	9.5	9.4	9.6
Kazakhstan	25.7	27.1	26.7	26.4	26.2	26.2
Korea, South	10.3	10.8	11.1	11.2	12.3	12.6
Mexico	17.4	17.9	18.3	17.6	17.0	17.9
New Zealand	31.1	29.8	29.5	28.5	28.2	28.2
Pakistan	6.6	6.7	6.8	7.0	7.0	7.0
Paraguay	24.7	26.2	24.6	22.9	22.5	23.7
Philippines	3.7	3.9	3.9	3.4	3.4	3.5
Russia	16.3	16.6	17.1	15.2	14.3	15.2
South Africa	15.5	14.5	14.0	14.1	14.1	14.2
Taiwan	4.8	4.7	4.8	5.1	5.0	5.1
Ukraine	11.7	10.9	10.5	8.4	8.6	8.1
United States	43.0	42.6	41.0	40.0	39.3	39.1
Uruguay	53.4	51.7	50.6	49.8	51.6	51.3
Uzbekistan	20.7	21.7	22.3	23.2	23.0	23.0
Venezuela	17.1	20.8	23.1	19.9	13.4	16.3

Note: May include meat of other bovines

Pork: Per Capita Consumption

Kilograms Per Person

	2006	2007	2008	2009	Oct 2010	Apr 2010
Per Capita Consumption						
Argentina	5.9	6.2	6.2	6.3	6.1	6.4
Australia	20.9	22.2	21.7	22.0	22.1	22.1
Belarus	40.8	39.1	44.9	42.0	43.2	42.7
Canada	25.2	26.6	25.5	25.1	22.7	25.0
Chile	21.1	20.0	20.8	22.2	21.1	22.1
China	35.0	32.3	34.9	36.4	37.3	37.5
Colombia	3.2	3.7	4.3	4.2	4.5	4.4
EU-27	42.1	43.9	42.8	42.1	42.2	41.9
Hong Kong	60.4	61.5	65.0	68.5	65.4	68.6
Japan	19.2	19.4	19.5	19.4	19.6	19.4
Kazakhstan	14.8	15.1	14.9	15.3	15.0	15.5
Korea, South	29.5	31.1	31.4	30.5	29.4	30.8
Mexico	13.9	14.0	14.6	15.9	15.1	15.9
New Zealand	20.5	21.1	20.4	20.9	21.9	21.2
Norway	24.7	27.7	27.3	27.3	26.9	26.9
Russia	18.2	19.4	21.7	21.3	21.4	21.6
South Africa	3.7	3.7	3.5	3.7	3.8	3.7
Switzerland	34.0	34.7	36.7	35.5	35.8	35.7
Taiwan	40.7	40.5	41.2	42.1	41.8	42.3
Ukraine	11.7	14.7	18.0	14.8	17.0	17.0
United States	29.0	29.8	29.0	29.3	27.7	27.6
Venezuela	5.1	5.0	5.0	4.8	4.7	4.7
Vietnam	20.5	21.8	21.8	21.6	21.5	21.4

Broiler Meat: Per Capita Consumption

Kilograms Per Person

	2006	2007	2008	2009	Oct 2010	Apr 2010
Per Capita Consumption						
Argentina	28.0	30.0	31.4	32.4	33.9	35.1
Australia	34.6	33.9	34.7	35.0	34.7	35.1
Brazil	35.8	38.1	39.7	39.3	40.2	40.1
Canada	30.1	29.9	30.0	28.8	29.4	29.4
Chile	29.2	29.6	28.3	28.9	28.4	29.0
China	7.9	8.6	9.0	9.1	9.4	9.4
Colombia	19.6	21.4	23.0	23.0	23.1	23.1
EU-27	15.6	17.0	17.4	17.5	17.6	17.6
Hong Kong	38.8	36.1	36.2	37.3	38.1	38.1
India	1.8	2.0	2.2	2.2	2.2	2.2
Indonesia	3.0	3.5	3.6	3.7	3.9	3.8
Iran	20.4	22.4	22.2	23.1	24.1	24.0
Japan	15.4	15.3	15.1	15.4	15.5	15.4
Korea, South	12.4	12.9	12.7	13.8	14.0	14.1
Kuwait	46.7	50.7	65.9	74.7	71.7	73.5
Malaysia	38.5	38.9	38.6	37.7	37.3	37.3
Mexico	28.0	28.2	29.8	29.4	30.0	29.4
Philippines	7.3	7.2	7.6	7.9	8.1	8.2
Russia	16.7	18.2	19.2	19.3	20.1	19.4
Saudi Arabia	35.4	36.8	37.6	40.6	41.6	40.7
South Africa	25.1	25.6	27.5	27.9	29.0	28.8
Taiwan	29.0	26.3	25.7	25.2	25.6	25.8
Thailand	12.4	12.5	11.9	12.2	12.5	12.5
Ukraine	11.2	13.2	17.7	17.1	18.3	17.9
United Arab Emirates	48.8	54.9	63.8	63.1	59.5	60.9
United States	45.8	45.1	44.2	42.2	43.3	44.2
Venezuela	30.7	32.3	36.6	29.9	32.0	29.8
Vietnam	4.4	5.3	6.3	6.1	6.1	6.1
Yemen	9.0	9.4	8.7	9.8	10.3	9.7

Note: Middle East consumption is likely to be overstated due to transshipments in the region and temporary workers not included in population statistics.

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.

Data Modifications

Cattle/Beef:

- China - Beginning in 2009 Chinese live cattle trade is based on partner country trade data as Chinese trade is now reported in tons rather than head.
- Egypt – Based on additional research, historical revisions were made for cattle and beef.
- Venezuela – Based on additional research, historical revisions were made for beef production. Cattle production was added for 2003 to present.
- United Arab Emirates – Based on additional data, beef trade estimates were revised for 2007 to present.

Swine/Pork:

- Australia – Based on official Australian data, swine ending stocks and beginning stocks are revised for 2000 onwards.
- China - Beginning in 2009 Chinese live swine trade is based on partner country trade data as Chinese trade is now reported in tons rather than head.

Broiler Meat:

- Kazakhstan – Based on newly available information, production has been revised for 2005 onwards.
- Mexico – Trade has been revised from 2000 onwards so as to reflect standard PSD HS codes as outlined below.

Conversion Rates

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

	Broiler Meat	**Turkey Meat**
Conversion Rate	1	1
HS Codes	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

Note: There are several exceptions by country/product. In general, chicken paws are excluded.

Assumptions

- **BSE:** Forecast assumes 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, 2010.
- **Other Diseases (AI, H1N1, FMD):** Forecast reflects policies currently in place as a result of outbreaks as of April 9, 2010.

Technical Notes

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.

FAS Reports from Overseas Offices

The *Livestock and Poultry: World Markets and Trade* circular is based on post reports submitted since March 2010 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.

Additional Resources

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

Situation and outlook information on U.S. livestock and poultry 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 to view archived and future releases. The next release of this circular will be in October 2010.

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