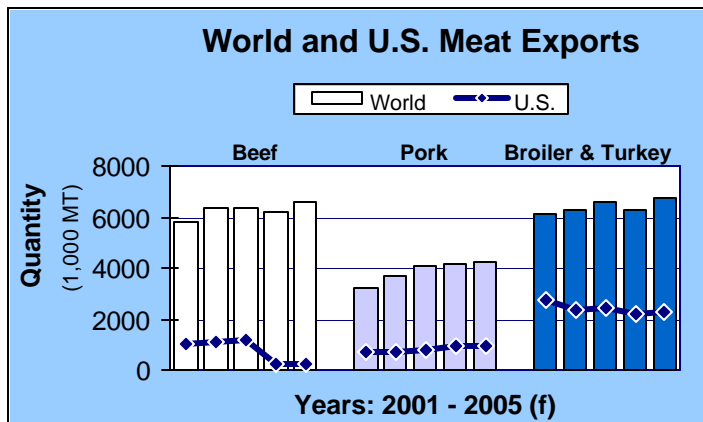




Livestock and Poultry: World Markets and Trade

World Meat Exports Forecast to Rise in 2005



Total meat (beef, pork, broiler meat and turkey) exports of leading world suppliers in 2005 are forecast at a record 17.6 million tons, up 5.4 percent from 2004. Brazil is expected to retain its position as the global leader in beef and broiler meat exports for the second year in a row. Chinese, U.S. and Canadian pork production and exports are also expected to rise to historical high levels.

U.S. total meat exports in 2005 are forecast at 3.5 million tons, up 6.4 percent from the previous year. Despite the increase in quantity, U.S. market share among major exporters is expected to remain unchanged at 20 percent in 2005. Strong growth continues to characterize U.S. pork exports in 2005, forecast to increase 2.2 percent to a record 959,000 tons, accounting for 23 percent of the trade among major exporters. U.S. beef and veal exports continue to be lower in 2004 and 2005 compared to average 2000 - 2003 levels due to import restrictions imposed by several key markets following the discovery of a single cow infected with bovine spongiform encephalopathy (BSE) in 2003. The United States' share of the major markets for broiler and turkey meat is forecast to remain steady at 34 percent in 2005 as exports are projected at nearly 2.3 million tons.

Beef exports by leading suppliers continue to set record levels, projected to reach nearly 6.6 million tons in 2005. In 2004 and 2005, Australia and New Zealand are expected to shift export volume to Japan, largely diverting trade from other markets. Two major suppliers, the United States and Canada are absent from Asian markets due to import bans related to BSE. Exports from South America are expected to continue to expand due to favorable economic conditions, investment, marketing efforts, and greater market access.

Pork exports are expected to set a record of 4.2 million tons, up 1 percent from 2004. China maintains its position as the world's largest pork producer and consumer while its exports are steadily rising. Major exporters continue to compete in the high value Japanese market, which, despite its safeguard and gate-price system, remains the world's largest pork importer. The EU-25 is the world's largest pork exporter. While only the more competitive EU exporters are likely to capitalize on external trade opportunities, intra-EU25 trade is expected to become more significant.

After having declined in 2004, broiler meat exports are forecast to return to their upward trend, reaching 6.2 million tons in 2005. Brazilian exports continue to expand, increasing 10 percent in 2005. Avian influenza and trade restrictions on broiler meat in 2004 have resulted in significant shifts in world broiler meat supply, greater emphasis on trade in cooked product in some markets, higher international prices, and shifts in market share between Brazil, China, Thailand, and the United States.

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To view this information on the internet, please go to: <http://www.fas.usda.gov/dlp/dlp.html>

NOTE TO READERS

The *Livestock and Poultry: World Market and Trade* circular is designed to give the reader a snapshot picture of what is happening among the major players in world beef, pork, broiler meat, and turkey trade. Summary tables for meat production, imports, exports, and consumption are presented to provide an overview of the world situation. In addition, an explanation of significant changes in production, supply, and demand (PSD) is provided for major meat importing and exporting countries.

Assumptions and Data Modifications

Forecasts of trade in animal products were made prior to the recently announced U.S.–Japan agreement on beef trade. Subsequent forecasts will reflect changes resulting from that and other announced agreements. Forecasts of 2004 and 2005 poultry trade reflect policies currently in place as a result of outbreaks in avian influenza. Subsequent forecasts will reflect any announced changes.

The PSD data series for the European Union (EU) has been modified to account for the 10 new members. Please refer to “Notes on European Data” on page 29 for details.

World Totals

Only those countries that make up USDA’s official PSD database are reported. This means world 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.

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/psd>.

In addition, please refer to the USDA/FAS Dairy, Livestock and Poultry (DLP) website at: <http://www.fas.usda.gov/dlp/dlp.html> for additional data and analysis, such as *International Agricultural Trade Reports*, *Trade at a Glance* and *Country Pages*. These reports are posted regularly on the homepage covering analysis on current issues and topics, new trade data, and market competition.

World Beef Trade Overview

Beef Exports Rise 6.5 percent in 2005; U.S. Market Share Forecast at 4 percent

Following the release of USDA official statistics on October 21, 2004, a framework agreement to resume trade was reached between the United States and Japan on October 23, 2004. While shipments could resume by early 2005, the estimates do not reflect the impact of the framework agreement. Necessary regulatory procedures have not been completed in either country and the level of expected trade is dependent on the timing and outcome of this work. USDA will update the estimates as more information becomes available. The following discussion reflects the situation prior to the framework agreement.

In 2005, total beef exports from leading suppliers are forecast to rebound, increasing to nearly 6.6 million tons following 2004 projected declines because of import bans due to bovine spongiform encephalopathy (BSE). Export growth will come from South America as export markets open in response to disease eradication efforts and improved price competitiveness due to favorable exchange rates. Exports to the European Union (EU), a traditional market for South American beef, will grow as EU producers limit production in order to adjust to Common Agriculture Policy (CAP) reform. In addition, smaller markets will have to import from non-traditional suppliers or import less as Australia and New Zealand shift a greater proportion of their exports to Japan and Korea. U.S. exports are forecast to increase by 70,000 tons in 2005, reflecting a continuing recovery of exports to those countries that have reopened their markets to U.S. beef. However as restrictions and bans on U.S. beef in Japan and Korea continue, U.S. exports will be less than one-fourth of 2003 levels and the United States will have dropped from the third to the ninth largest exporter of beef in the world.

Total beef exports for leading suppliers are projected at 6.2 million tons for 2004, revised upward 5 percent from the March 2004 estimate, but lower than 2003 due to BSE. For major suppliers in South America, the 2004 estimate is revised upward to reflect increases following the relaxation of some import bans due to Foot and Mouth Disease (FMD). The 2004 estimate for U.S. beef exports is revised upward to reflect the reopening of Mexico and Canada as well as secondary markets.

Imports in 2005 are forecast to be 4.8 million tons, or 4 percent higher than 2004. Aggregate consumption in major markets will remain relatively unchanged from 2004 to 2005 due to higher prices and tighter supplies. Production will decrease marginally in the European Union due to CAP reform and in Australia, and New Zealand as producers rebuild cattle herds following high slaughter rates due to periods of drought and high beef prices. In the United States, production is forecast to remain relatively unchanged due to low cattle inventories and imports are forecast to increase 2 percent. The United States will remain the largest beef importer in 2004 and 2005. Total beef imports for major markets are forecast at 4.6 million tons for 2004, revised upward 3 percent from the March 2004 estimate. Japan is importing more from Australia and New Zealand to make up for reduced imports due to bans on North American beef. The European Union is forecast to import more from South America.

Key Exporters

- **United States:** U.S beef exports will be limited in 2005 due to bans currently in place by major importing countries. Mexico has become the largest importer of U.S. beef and the trend is expected to continue, as import bans by other countries are assumed to remain in 2005. U.S. beef exports are forecast to be 272,000 tons in 2005, representing a 35-percent increase over 2004, but remaining significantly below historical levels. In 2004, exports to reopened markets are not expected to reach pre-BSE levels, in particular to Canada, where cattle inventory and beef supplies are at record-high levels. U.S. production will be stable as producers take advantage of improved weather conditions and better grain prices to shift towards herd rebuilding. The United States is the primary high-quality beef supplier to the world, but as long as bans on U.S. beef continue, Australia will have an opportunity to improve its competitive position in supplying beef to major markets such as Japan and Korea.
- **Brazil:** With a forecast 1.6 million tons in beef exports in 2005, Brazil is expected to remain the world's largest beef supplier despite the recent discovery of FMD in the pre-Amazon region of mid-northern Brazil. The majority of beef production for export originates outside of the pre-Amazon in southern, southeastern, and central-western Brazil, which benefits from better access to infrastructure, abundant feed supplies, and inexpensive land unencumbered by environmental regulations. Brazilian beef exports will continue increasing due to expansion and improvement of productivity, favorable exchange rates, and aggressive marketing efforts. In 2005, beef production is expected to increase by 5 percent due to improved economic growth generating increased domestic demand, continued expansion of beef exports, and a record beef cattle herd. The 2004 beef export forecast was revised upward to nearly 1.5 million tons to reflect expected increases in exports to the European Union, Egypt, and Russia because of rising prices in those markets and favorable exchange rates.
- **Australia:** Australian beef exports are forecast to remain at 1.3 million tons in 2005. A marginal decrease in beef production is anticipated as Australia balances herd rebuilding with current high beef prices. Pasture conditions have improved this year following what was the worst drought in a century. However, prices are relatively high in Japan, Korea, and the United States, which are pulling Australia's exports away from smaller markets. As of August 2004, Australia's year-to-date beef exports to Japan were up 42 percent and beef exports to Korea were up 32 percent. Producers are expected to continue taking advantage of higher prices due to lower competition in other markets, which will lead to increased exports to these markets and reduced domestic consumption in Australia.
- **India:** India's beef and carabeef (buffalo meat) exports are forecast at 625,000 tons in 2005, representing a 16-percent increase over 2004, due to increased production, improved quality, and greater demand in export markets. India's marketing efforts are increasing exports in both traditional and new markets and beef production is increasing to meet this demand through investments in meat processing capacity. Meat quality is improving due to better animal health management, greater efficiency in animal production, and investments in feedlots.
- **New Zealand:** New Zealand beef exports are forecast at 605,000 tons in 2005, relatively unchanged over 2004. Assuming a return to normal pasture conditions, higher cow and heifer

retention for herd rebuilding in 2005 is expected to reduce slaughter of female animals and lower beef production nearly 1 percent in 2005. The 2004 beef export estimate is revised upward from the March 2004 estimate to reflect increased exports to Korea and Japan as exporters take advantage of bans on U.S. beef. This is evidenced by exports to Japan increasing 92 percent and Korea increasing 99 percent January through August 2004 compared to the same period in 2003.

- **Argentina:** Argentina's 2005 beef exports are anticipated to achieve a 25-year high due to strong world demand, the opening of new markets due to improved sanitary status, and favorable exchange rates. Cattle liquidation resulting from a severe drought in 2003 led to increased beef production in 2004, which boosted available supplies. Beef production capacity has increased in the last few years and will likely continue given recent investments by meat packers. As the Argentine government continues to aggressively negotiate the opening of markets now that the FMD situation has improved following large-scale vaccinations, there will be expanded opportunities for Argentine beef exports. The 2004 beef export estimate is revised upward from the March 2004 estimate because of expected increases in exports to the United States, the European Union, Russia, and Venezuela.
- **Canada:** In 2005, beef production will increase whereas consumption will not; hence exports are expected to rise 6 percent to 570,000 tons, compared to 2004, but 7 percent less than pre-BSE exports in 2002. The United States will remain Canada's most important beef export market, but the Canadian government is aggressively pursuing efforts to reopen other markets to reduce dependency on the United States. Canadian producers face significant challenges due to bans on cattle exports to the United States. Cattle inventories continue to rise, and are expected to exceed 16 million head at the end of 2005, while slaughter capacity remains limited. Canadian packers are operating near full capacity and expected increases in slaughter capacity for 2005 cannot process all of the cattle that would normally be exported to the United States. Canadian producers are proposing ways to deal with the surplus cattle, with the support of the Canadian government, such as increasing slaughter capacity and displacing imports with domestic production. The 2004 Canadian beef export estimate was revised downward 4 percent from the March 2004 estimate because beef exports have been slower than expected.

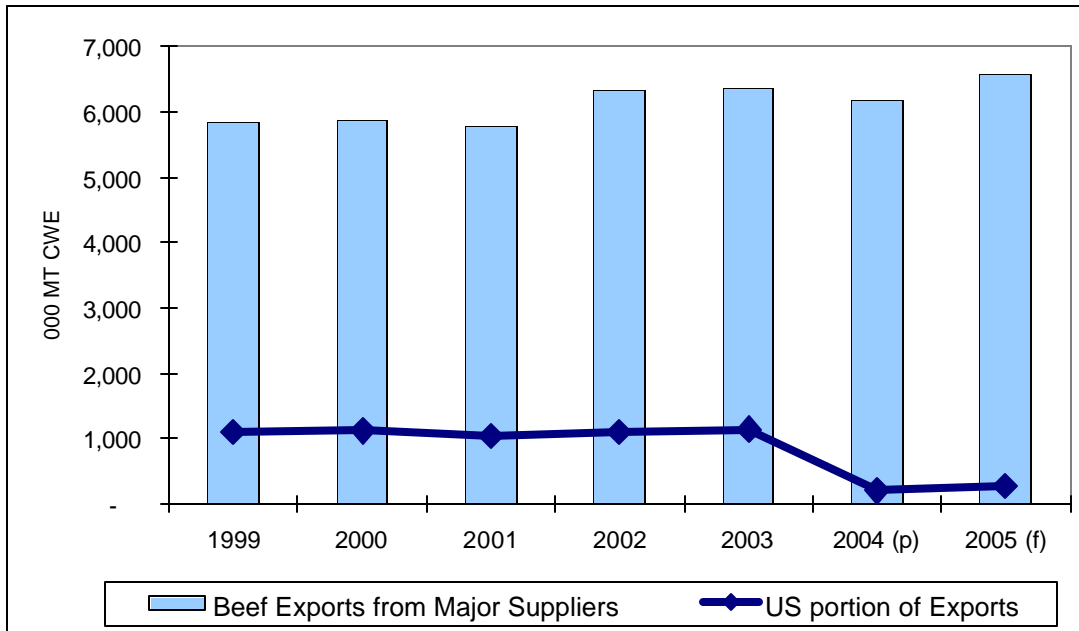
Key Importers

- **United States:** The 2004 beef import estimate is revised upward 5 percent from the March 2004 estimate. In 2005, U.S. beef imports are forecast to reach nearly 1.7 million tons, though consumption will remain stable, increasing by less than 1 percent in 2005. Import growth partly reflects reduced cow slaughter. Lean trimmings from grass-fed, older cows are mixed with fat trimmings from grain-fed beef for hamburger meat. Supplies of domestic processing beef are expected to be lower as cow inventories have been declining. In addition, the ban on imported Canadian cattle has contributed to a smaller number of cows and cow beef available to U.S. meat packers for processing. Because of lower U.S. production of lean trimmings and stable demand, lean trimmings must be imported from Australia, New Zealand, and Uruguay. U.S. imports from Uruguay have increased due to the higher prices in the U.S. market and resumption of FMD-free status.

- **Russia:** Russian beef imports will remain steady in 2005. Imports from Russia's largest supplier, Ukraine, are forecast to decline due to lower production in Ukraine. The decline in imports from Ukraine is forecast to be offset by increases in imports under the quota system as implementation of the tariff rate quota improves. Russian beef production is expected to decrease 4 percent, limiting supply and increasing prices. Recently, the livestock sector experienced a further reduction in the number of large farms partially due to high feed costs and poor feeding conditions, which is expected to lower calf production in 2004. Due to the higher prices and tighter supplies, consumption is forecast to decrease nearly 3 percent.
- **European Union:** In 2005, beef imports in the 25-member European Union are forecast to be 535,000 tons, up 2 percent over last year. The EU beef trade deficit is forecast at 165,000 tons net imports in 2005 and is expected to continue rising as the result of declining production and a shift in policy to decouple support payments from production. Farmers in the new member states are expected to face challenges to meet new EU environmental, food quality, and animal welfare standards because these countries will not have fully transitioned to the CAP system. The European Union did not ban U.S. beef due to BSE, but hormone-related restrictions continue to limit the amount of U.S. beef that can be exported to the EU.
- **Japan:** In 2005, beef imports are forecast at 611,000 tons, 1 percent higher than expected imports in 2004, but 25 percent lower than in 2003. Japanese beef imports will be constrained as long as bans on U.S. beef remain. Prior to the ban, U.S. beef accounted for one-third of beef consumption in Japan. Domestic production and imports from Australia and New Zealand have increased over previous levels. However, these increases are not enough to meet Japanese demand, resulting in a tight supply situation. Australian grass-fed beef is not fully substitutable with U.S. grain-fed beef and Australia's grain-fed beef production cannot reach levels comparable to the United States due to grain supply constraints and limited feedlot capacity. The 2004 beef import estimate was revised upward because imports from Australia and New Zealand have been sharply up in the first half of the year.
- **Mexico:** In 2005, Mexico is expected to import 320,000 tons of beef, an increase of 19 percent over 2004. Beef production is forecast to decline in 2005 constrained by fewer cattle available for slaughter, as Mexico has experienced drought in the last two years in the north, which encouraged the sale of cattle and reduced cattle inventory. Production also is affected by record numbers of cattle shipped to the United States for feeding purposes. Exports of feeder cattle from northern Mexico to the United States are high due to extremely high feeder cattle prices in the United States. Mexico's drought situation has improved, but fodder reserves and feed prices have not returned to normal levels. Assuming pasture conditions improve, cattle available for slaughter is expected to decline in 2005 as producers retain cattle for herd rebuilding. Lower production in 2005 will improve export opportunities for selected U.S. beef products popular in Mexico. The 2004 import estimate was increased from the March 2004 estimate to reflect Mexico's reopening its borders to U.S. and Canadian beef.
- **Korea:** In 2005, Korean beef imports are anticipated to increase 38 percent over 2004 to 275,000 tons, but remain significantly below import levels prior to the import ban on U.S. beef. In 2004, beef consumption dropped due to BSE concerns; however, demand appears to still be greater than available supply. Consumer demand, higher costs to produce beef

domestically, and tighter world supply of beef have led to higher beef prices in Korea. Korean importers must out-bid Japanese importers for available beef supplies. Facing higher prices, Korean consumers have restrained their beef consumption and looked for alternative substitutes, such as pork, or fish. There are signs that consumer confidence in beef is improving and consumption is expected to increase 11 percent in 2005.

Beef Exports Rise 6.5 percent in 2005; U.S. Market Share Forecast at 4 percent



Beef and Veal Summary Selected Countries

1,000 Metric Tons (Carcass Weight Equivalent)

	2000	2001	2002	2003	2004 (p)	2005 (f)
Production						
Brazil	6,520	6,895	7,240	7,385	7,830	8,222
European Union 1/	8,253	7,629	8,138	8,045	8,035	7,915
China, Peoples Republic of	5,328	5,488	5,846	6,305	6,683	7,110
Argentina	2,880	2,640	2,700	2,800	2,900	2,730
India	1,700	1,770	1,810	1,960	2,130	2,230
Mexico	1,900	1,925	1,930	1,950	2,150	2,070
Australia	1,988	2,049	2,089	2,073	2,005	2,000
Russian Federation	1,840	1,760	1,740	1,670	1,610	1,550
Canada	1,246	1,250	1,294	1,190	1,450	1,500
New Zealand	580	609	589	693	710	705
Others 3/	5,812	5,193	5,431	3,968	3,951	4,008
Total Foreign	38,047	37,208	38,807	38,039	39,454	40,040
United States	12,298	11,983	12,427	12,039	11,206	11,242
World Total	50,345	49,191	51,234	50,078	50,660	51,282
Consumption						
European Union 1/	8,093	7,489	8,118	8,324	8,175	8,084
China, Peoples Republic of	5,284	5,434	5,818	6,274	6,648	7,075
Brazil	6,102	6,191	6,437	6,273	6,415	6,665
Mexico	2,309	2,341	2,409	2,308	2,410	2,375
Russian Federation	2,309	2,404	2,395	2,315	2,255	2,195
Argentina	2,543	2,514	2,362	2,426	2,363	2,132
India	1,351	1,400	1,393	1,521	1,590	1,605
Japan	1,534	1,371	1,285	1,324	1,126	1,116
Canada	992	969	989	1,065	1,008	1,005
Australia	645	653	696	786	756	711
Others 3/	5,885	5,360	5,501	4,043	3,878	3,931
Total Foreign	37,047	36,126	37,403	36,659	36,624	36,894
United States	12,503	12,351	12,738	12,339	12,582	12,653
World Total	49,550	48,477	50,141	48,998	49,206	49,547

Source: Counselor and attache reports, official statistics, and results of office research.

Notes: 1/ The data series was revised to represent EU-25 member states.

2/ Includes buffalo.

3/ For 2003, Colombia, Costa Rica, Dominican Republic, El Salvador, Honduras, Nicaragua and Venezuela are dropped from the database.

(p) preliminary, (f) forecast

Beef and Veal Summary Selected Countries

1,000 Metric Tons (Carcass Weight Equivalent)

	2000	2001	2002	2003	2004 (p)	2005 (f)
Imports						
Russian Federation	478	650	660	650	650	650
Japan	1,016	955	678	810	604	611
European Union 1/	426	394	501	517	525	535
Mexico	420	426	489	370	270	320
Korea, South	324	246	431	445	200	275
Egypt	236	136	162	93	150	155
Philippines	118	104	126	120	125	130
Hong Kong	71	71	71	81	82	85
Taiwan	83	78	89	98	81	83
Canada	263	299	307	273	85	80
Others 3/	234	172	213	226	194	209
Total Foreign	3,669	3,531	3,727	3,683	2,966	3,133
United States	1,375	1,435	1,460	1,363	1,627	1,660
World Total	5,044	4,966	5,187	5,046	4,593	4,793
Exports						
Brazil	492	748	881	1,175	1,470	1,620
Australia	1,338	1,399	1,366	1,264	1,300	1,300
India	349	370	417	439	540	625
New Zealand	505	516	505	578	600	605
Argentina	357	169	348	386	540	600
Canada	523	574	610	384	540	570
Uruguay	236	145	259	320	400	440
European Union 1/	645	595	586	437	410	370
Ukraine	157	98	146	168	100	90
China, Peoples Republic of	54	60	44	43	45	50
Others 3/	100	82	75	24	26	32
Total Foreign	4,756	4,756	5,237	5,218	5,971	6,302
United States	1,119	1,029	1,110	1,143	202	272
World Total	5,875	5,785	6,347	6,361	6,173	6,574

Source: Counselor and attache reports, official statistics, and results of office research.

World Pork Trade Overview

Rising Global Demand Fuels Growth in Pork Production and Trade.

World Summary: Despite increasing prices, world demand for pork continues to grow. During the first half of 2004, average wholesale pork prices in the United States, Europe and Japan rose by more than 15 percent. Retail prices have remained relatively more stable, helping to sustain world consumption at record levels. As beef and poultry markets gradually recover from the disruptions of BSE and avian influenza, growth in world pork consumption should continue, albeit at a slower rate. Around the world, pork remains the most widely consumed meat protein, even though poultry is catching up. Rising incomes, particularly in China, seem to be fueling growth in world demand. In the United States, the popularity of low carbohydrate / high protein diets also appears to be energizing consumer interest in pork. With growing worldwide demand, pork production is working to keep pace. China, the EU, Canada, the United States and Brazil, which according to FAO account for an estimated 80 percent of world production, will collectively produce more than 80 million tons of pork in 2004. Production for the selected reporting countries is expected to continue growing, increasing by about 1 percent in 2005.

The expansion of world consumption and production underscores the increasing importance of trade, even where countries have the capacity to be self-sufficient. Regional differences in the consumer preference for particular meat cuts create opportunities for trade. Meat cuts can potentially be marketed wherever they receive the highest price. Trade in meat cuts is in fact growing relatively faster than trade in whole or half carcasses. Over the last two years, exports of whole and half carcasses from major world suppliers have grown 5 percent, while trade in pork meat cuts has grown by almost 8 percent. Still, as more high-value meat cuts are traded internationally, the profit potential is often mitigated by a number of factors. In many developed countries, there is an increasing cost with conforming to more stringent environmental and animal welfare regulations. As yet, there is no clear evidence to suggest that consumers are willing to pay for this added cost. Trade is also quite vulnerable to the many complexities that determine market access. Unlike domestic markets, international trading arrangements can sometimes change dramatically overnight. Notwithstanding these many uncertainties, major pork producers continue to aggressively vie for very lucrative international market shares. Pork exports by the major suppliers, which are projected to reach 4.2 million tons in 2004, are forecast to grow by 1 percent in 2005.

Key Exporters:

- **United States:** Strong domestic and international demand is expected to continue sustaining hog prices in 2004 and 2005. Pork production in 2005 will reach 9.5 million tons, an increase of 2 percent from 2004. Live hog imports from Canada, which have helped maintain U.S. pork production at record levels, are currently subject of anti-dumping and countervailing duty investigations. The current forecast however, does not take into account the implications of the recent preliminary

determination on the anti-dumping case. The U.S. Department of Commerce is expected to make a final determination on both investigations by March 7, 2005. In any case, U.S. pork production, consumption, and exports continue to grow. The top three markets, Japan, Mexico, and Canada, still account for about 80 percent of U.S. exports. Demand for U.S. pork is expected to remain strong in 2005, especially as the relative weakness of the U.S. dollar continues to further enhance the competitiveness of U.S. pork.

- **Canada:** Canadian pork production is forecast to grow by less than 2 percent in 2005, to 1.9 million tons. Strong prices for market hogs and record exports of live hogs to the United States are expected to encourage an expansion of the breeding herd. Canadian exports of feeder and slaughter pigs to the United States have been very strong, reaching over 7.4 million head in 2003, an increase of 30 percent from 2002. Live hog exports are currently forecast to reach new records in 2004 and 2005. On October 15, 2004, the U.S. Department of Commerce announced a preliminary anti-dumping determination on U.S. imports of live swine from Canada, setting preliminary dumping margins ranging from *de minimis* to 15.01 percent. Although the investigation is continuing, a duty on hogs could encourage an expansion of Canadian slaughter capacity, the current dumping margins may end up favoring lower value exports (i.e. feeder pigs). Feeder pigs already account for about 67 percent of total live hog exports to the United States. Canadian hog producers are likely to shoulder most of the added cost of shipping hogs to the United States.

Canadian domestic pork consumption is gradually recovering from the disruptions caused by the Canadian BSE crisis of May 2003. At the time, consumption fell by almost 10 percent, as Canadian consumers increased purchases of domestically produced beef in response to lower beef prices. Pork consumption is expected to increase 5 percent in 2004, and by more than 1 percent in 2005. Bilateral pork trade between Canada and the United States continues to grow significantly. The United States is Canada's largest export market, accounting for over 56 percent of total pork exports in 2003. Although pork exports to the United States have decreased by almost 9 percent during the first seven months of 2004, recent exports to Japan and Mexico have been particularly strong. Pork exports are expected to increase by 2 percent in 2005.

- **Brazil:** Brazilian pork production is forecast to increase by about 2 percent in 2005. Lower feed costs should benefit hog producers. Hog production, particularly in the center-west region around the State of Mato Grosso, is growing significantly because of state, federal, and foreign investment. Increased hog production in Mato Grosso appears to be offsetting small declines in production in the traditional producing areas of the South. Domestic consumption is expected to increase 2 percent in 2005, driven by improving economic conditions and higher incomes. The pork industry recently launched a promotional campaign designed to encourage greater domestic consumption of fresh pork. Almost 70 percent of Brazilian pork consumption is still in processed form. Currently, Brazil exports almost one-quarter of its domestic production. While heavy reliance on the Russian market continues to periodically

generate considerable uncertainty, Brazilian pork exporters are working toward greater market diversification. During the first half of 2004, exports to markets such as South Africa, Singapore, Ukraine, Bulgaria, Armenia, and Lithuania, have increased. For more information on Brazil, please refer to the following report: <http://www.fas.usda.gov/dlp/IATRs/2004/Brazilmeat.html>

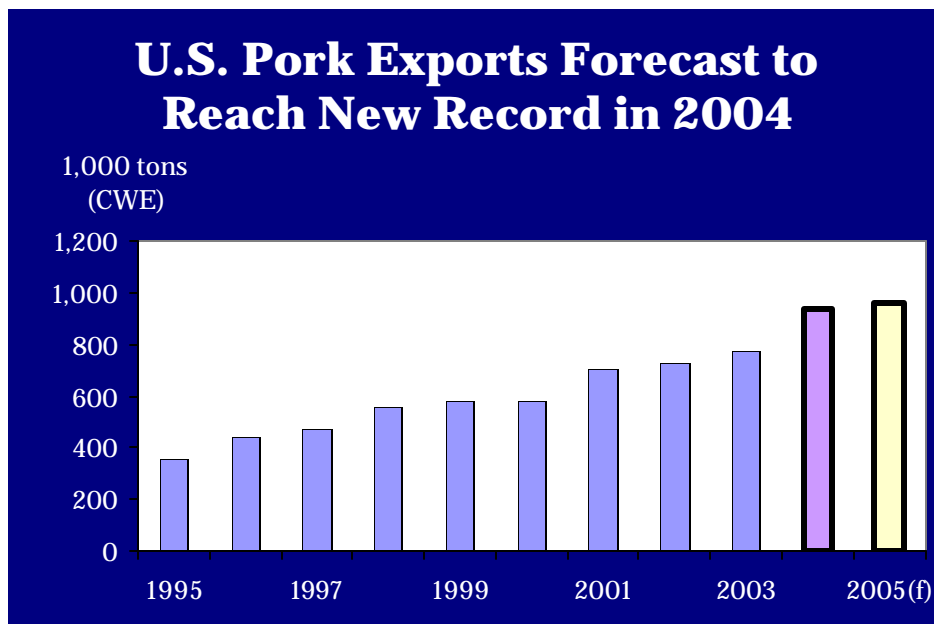
- **European Union:** Lower beginning inventories and reduced sow numbers continue to affect the 2004 outlook on production in both the EU-15 and in the new EU member states. Pig production in the EU-15 is expected to decline slightly from 2003, as improving productivity appears to be offsetting rising production costs (For additional information see tables on pages 32 and 33). Producer prices have generally been rising due to tighter supplies, and there is some evidence of strengthening demand, particularly in Germany. French producers, still recovering from the effects of the 2003 drought, will receive an \$18 million aid package for market restructuring, research, and to promote quality and branded products. In January 2004, concerns over rising feed prices, as well as the relative strength of the Euro vis-à-vis the U.S. dollar, brought the EU Commission to announce that it would reintroduce export refunds for pig carcasses and cuts. The decision, which was later rescinded in March, would not in any case have applied to the 10 accession countries, which entered the EU on May 1, 2004. With the accession, the EU Commission estimates that over the next six years, EU-25 pork production could increase by as much as 30 percent from the 2003 EU-15 production level. However, in 2004, pork production in the new member states is expected to decline nearly 5 percent, mainly as result of reduced slaughter in Poland, Hungary and the Czech Republic. While Poland's pig inventories are expected to gradually recover, 2005 pork production in the new EU member states should remain at the 2004 level. Nevertheless, pork consumption in many of the accession countries should remain strong, particularly as incomes increase. EU-25 external trade is forecast to decrease in 2004 and 2005, mainly as a result of the Russian tariff rate quota. Although the relative importance of intra-trade with the new member states is certain to increase, extra EU-25 exports, particularly those originating from countries like Denmark and the Netherlands will still continue to grow.
- **China:** Avian influenza has had a significant impact on Chinese pork production and consumption. Lingering concerns over the bird flu epidemic appears to be encouraging pork production in response to rising consumer demand. In 2005, Chinese pork production is expected to reach 47.5 million tons, a slight increase from 2004. Production costs are quickly rising. Despite prices currently reaching historically high levels, rising per capita income should help fuel Chinese consumption in 2005. Pork exports are also expected to grow significantly in 2005. While the Russian quota could limit the export potential from northern provinces like Heilongjiang, China is expected to remain very competitive in Asian markets like Hong Kong, Japan and North Korea.

Key Importers:

- **United States:** In 2003, the United States imported a record 538,000 tons of pork, an 11 percent increase from 2002. However, pork imports for 2004 and 2005 are expected to decrease, primarily due to the relative weakness of the U.S. dollar.
- **Japan:** Japan remains the world's largest pork importer. After imports declined by almost 3 percent in 2003, Japanese imports are expected to increase 8 percent in 2004 and 2 percent in 2005. Rising inventories of frozen pork, particularly used for further processing, can periodically weaken import demand. At the same time, importing pork to build inventory often ends up triggering the pork safeguard. In 2003, Japanese domestic production reversed earlier trends by growing 2 percent over the previous year. Domestic production is expected to increase by about 1 percent in 2004, and should remain stable in 2005. Strong consumer demand and limited availability of beef and poultry are expected to push 2004 pork imports to 1.2 million tons, a new record. The safeguard duty on pork imports, which raises the gate price for carcass imports from 409 Yen to 510 Yen per kg (\$1.54 per lb to \$1.92 per lb), and the gate price for pork cuts from 546 to 681 Yen per kg (\$2.05 per lb to \$2.56 per lb), will expire on March 31, 2005. This special safeguard provision is designed to trigger when quarterly imports exceed the average of the three previous corresponding quarters by 19 percent or more. It is unlikely that a surge in imports will again trigger the safeguard in 2005. For more information on the Japanese pork safeguard, please refer to the following report:
<http://www.fas.usda.gov/dlp/IATRs/2004/JapanPorkSafeguard.html>
- **Hong Kong:** With disruptions in beef and poultry supplies, Hong Kong's pork trade remains strong. More restaurants seem to be promoting pork and lamb. Macroeconomic conditions are generally improving, and the tourist trade, particularly from mainland China, appears to be picking up. Imports are forecast to grow by about 5 percent in 2004 and nearly 6 percent in 2005. Hong Kong meat traders have noted that China is becoming more aggressive in trying to tackle the smuggling problem. Also, there seems to be a scarcity of import permits, given the growth in consumer demand.
- **Mexico:** Mexican pork production is expected to reach almost 1.2 million tons in 2005, an increase of about 2 percent from the projected 2004 level. Live hog imports, which fell by more than 50 percent in 2003, are forecast to increase in 2004 and 2005. The Mexican pig crop and slaughter are also expected to rise to meet growing consumer demand. Even as Mexican beef imports from the United States gradually resume, pork consumption is expected to remain strong, with annual growth of about 6 percent in 2004, and 3 percent in 2005. With strengthening prices, the profitability and productivity of the Mexican pork sector continues to improve. Nevertheless, growth in domestic consumption continues to outpace domestic supply. Mexico's imports are therefore expected to grow by more than 6 percent in 2005. The United States, which accounts for about 80 percent of Mexican imports, is expected to

continue to be the major pork supplier. At this time, the Government of Mexico is still pursuing a self-initiated anti-dumping investigation on imports of U.S. ham.

- **Russia:** In 2005, domestic pork production is expected to grow by almost 3 percent, as feed supplies and prices remain favorable. The tariff rate quota (TRQ) system, designed to facilitate the recovery of Russian meat production, sets country specific quotas on imports under HS code 0203 (fresh and frozen pork). The 2004 TRQ parameters, announced on November 29, 2003, set the following country limits: the European Union (including the 10 accession countries) – 227,300 tons; the United States – 42,200 tons; Paraguay – 1,000 tons; all other countries (except CIS countries) compete for the remaining 179,500 tons. The tariff is set at 15 percent, but no less than €0.25 /kg (14 ¢ / lb) for volumes within the TRQ. Above that level, the tariff becomes 80 percent, but no less than €1.06 /kg (60 ¢ / lb). The TRQ has contributed to a general increase in meat prices. Furthermore, administrative difficulties in the distribution of TRQ licenses suggest that the 2004 annual quotas are unlikely to be completely filled.



Pork Summary Selected Countries

1,000 Metric Tons (Carcass Weight Equivalent)

	2000	2001	2002	2003	2004 (p)	2005 (f)
Production						
China, Peoples Republic of	40,314	41,845	43,266	45,186	47,170	47,500
European Union 1/	20,717	20,427	20,938	21,243	21,001	21,108
Brazil	2,010	2,230	2,565	2,560	2,585	2,640
Canada	1,640	1,731	1,854	1,882	1,900	1,935
Russian Federation	1,500	1,560	1,630	1,710	1,740	1,790
Japan	1,269	1,245	1,236	1,259	1,270	1,265
Philippines	1,008	1,064	1,095	1,145	1,175	1,220
Mexico	1,035	1,065	1,085	1,100	1,150	1,175
Korea, South	1,004	1,077	1,153	1,149	1,100	1,170
Taiwan	921	962	935	893	895	895
Others	1,805	1,681	1,765	1,776	1,540	1,409
Total Foreign	73,223	74,887	77,522	79,903	81,526	82,107
United States	8,596	8,691	8,929	9,056	9,332	9,512
World Total	81,819	83,578	86,451	88,959	90,858	91,619

Consumption						
China, Peoples Republic of	40,378	41,800	43,195	45,053	46,928	47,188
European Union 1/	19,242	19,317	19,746	20,003	19,801	19,959
Japan	2,228	2,268	2,377	2,372	2,493	2,548
Russian Federation	2,019	2,119	2,429	2,329	2,239	2,289
Brazil	1,827	1,919	1,975	1,957	2,015	2,060
Mexico	1,252	1,298	1,349	1,423	1,515	1,565
Korea, South	1,058	1,158	1,199	1,294	1,330	1,360
Philippines	1,038	1,085	1,137	1,167	1,198	1,244
Canada	1,047	1,082	1,072	1,004	1,054	1,069
Taiwan	975	977	963	940	973	965
Others	2,134	2,046	2,165	2,241	2,007	1,909
Total Foreign	73,198	75,069	77,607	79,783	81,553	82,156
United States	8,456	8,388	8,684	8,816	8,950	9,041
World Total	81,654	83,457	86,291	88,599	90,503	91,197

Source: Counselor and attache reports, official statistics, and results of office research.

Notes: 1/ The data series was revised to represent EU-25 member states.

(p) preliminary, (f) forecast

Pork Summary Selected Countries

1,000 Metric Tons (Carcass Weight Equivalent)

	2000	2001	2002	2003	2004 (p)	2005 (f)
Imports						
Japan	995	1,068	1,162	1,133	1,225	1,250
Russian Federation	520	560	800	620	500	500
Mexico	276	294	325	371	415	440
Hong Kong	247	260	275	302	317	335
Korea, South	174	123	155	153	200	208
Canada	68	91	91	91	110	110
Romania	25	48	82	103	90	95
China, Peoples Republic of	137	94	145	149	88	88
Australia	43	38	55	67	75	80
Taiwan	54	15	28	47	78	70
Others	91	108	108	113	96	97
Total Foreign	2,630	2,699	3,226	3,149	3,194	3,273
United States	439	431	485	538	506	506
World Total	3,069	3,130	3,711	3,687	3,700	3,779
Exports						
European Union 1/	1,522	1,135	1,158	1,325	1,250	1,166
Canada	660	728	864	975	960	980
Brazil	162	337	590	603	570	580
China, Peoples Republic of	73	139	216	282	330	400
Australia	49	67	78	74	60	60
Mexico	59	61	61	48	50	50
Korea, South	31	42	16	17	11	15
Ukraine	10	2	1	12	12	12
Russian Federation	1	1	1	1	1	1
Others	3	3	2	0	0	0
Total Foreign	2,570	2,515	2,987	3,337	3,244	3,264
United States	584	708	731	779	938	959
World Total	3,154	3,223	3,718	4,116	4,182	4,223

Source: Counselor and attache reports, official statistics, and results of office research.

Notes: 1/ The data series was revised to represent EU-25 member states.

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

World Broiler Trade Overview

World Poultry Exports Expected to Increase 7.2% in 2005; Brazil Maintains Lead

World Trade:

Brazil is the emerging leader in broiler meat exports, surpassing the United States in the 2004 and 2005 forecasts. However, Asian markets will determine long-term growth in broiler meat production and consumption. In 2003 and 2004, high pathogenic avian influenza (HPAI) outbreaks disrupted production and exports in Asia, Netherlands, Canada and the United States. Although HPAI outbreaks have limited world broiler meat exports, other economic factors such as exchange rates, energy prices, and feed production are influencing broiler meat production of leading suppliers. In 2004, cooked poultry meat production significantly grew as Asian suppliers adjusted to bans placed on uncooked poultry meat due to avian influenza (AI) outbreaks. Increased demand from consuming countries and increased interest from supplying countries wishing to mitigate market risk from AI-related bans will influence cooked poultry production and trade. In late 2003 and 2004, demand shifts for cooked broiler meat in Japan and the EU resulted from import-bans due to AI. Both China and Thailand shifted a considerable amount of exports from uncooked to cooked poultry to reduce export market loss due to HPAI outbreaks. Despite these efforts, Brazil largely benefited from its competitors' loss of exports in key markets.

Key Exporters:

- **United States:** In 2005, U.S. broiler meat exports are expected to increase by 6 percent as demand moves higher in response to falling prices, production increases and abundant stocks of frozen leg quarters. In the first part of 2004, U.S. exports to some major markets show significant shifts. In 2004, broiler meat exports are expected to fall due to four factors; relatively higher prices compared to 2003, administrative TRQ-related actions by Russia, stronger competition from Brazil, and import bans due to AI. U.S. broiler meat export-volume in January-August 2004 was up 31 percent to Middle Eastern countries, down 8 percent in Caribbean countries, down 83 percent to China, down 50 percent to Hong Kong and down 58 percent to Korea. U.S. broiler production in 2004 has been expanding at a moderate rate despite weakening prices for individual cuts of meat. In 2005, production is forecast at 16 million tons, a 3-percent increase from the previous year.

Domestically, 2004 has been a favorable year for the poultry industry, since demand for poultry meat has been strong. Low-carbohydrate diets and rising incomes have fueled this increase in consumption. U.S. broiler meat consumption in 2005 is forecast to increase 3 percent.

- **Brazil:** In 2005, Brazilian broiler meat exports are projected to increase by 10 percent fueled by competitive pricing, market promotion efforts, favorable exchange rates and AI-related import bans on major competitors. In the first part of 2004, broiler meat exports were up 22 percent to 1 million tons. This increase was largely attributed to rising export opportunities in Japan, the Commonwealth of Independent States (CIS), and Saudi Arabia, where Brazil remains competitive and is a reliable

supplier. Brazil's marketing strategy to increase valued-added poultry meat (such as high-end cuts and processed broilers) the vast majority of Brazil's exports remains to the top import-markets. Brazil's export-growth to these markets was in larger increments than usual. From January through August 2004, Brazil increased broiler meat exports to Japan by 65 percent, to Saudi Arabia by 13 percent and to CIS countries by 259 percent. In Russia, Brazil has been constrained by its inability to obtain an individual quota allocation, thus, its poultry meat is imported under an "other country" quota. While Brazil seeks an individual quota allocation, the Russian government has not been willing to grant one.

Combined with relatively low feed grain costs, relatively low labor costs, and increasingly larger economies of scale, Brazil's production costs for whole eviscerated chicken are estimated to be the lowest of any major supplier at 1.37 Real/kg (US \$0.48/kg).

- **European Union-25:** In 2005, broiler meat production is expected to grow by less than 1 percent to just under 8 million tons. Improved feed costs following droughts in 2003 and recovery from AI are factors in the European Union's growth in broiler meat production. In the first eight months of 2004, production in Belgium and the Netherlands slowly recovered from the devastating 2003 AI outbreaks, while French broiler production marginally decreased due to higher production costs and sluggish export growth. However, Germany and Spain's production is expected to be stimulated in 2004 due to an upward trend in demand. In the first six months of 2004, the bulk of the European Union's broiler meat exports went to Ukraine, Saudi Arabia, Russia and Yemen.

NOTE: The complete PSD data series for the EU has been modified to account for the 10 new members. Please refer to "Notes on European Data" on page 29 for details.

- **Thailand:** Significant HPAI outbreaks in commercial flocks combined with concerns over human health are expected to lower Thailand's broiler meat exports in 2004 by 52 percent. In 2005, Thai broiler meat exports are not expected to fully recover to levels of recent years and broilers exports forecast is up 18 percent to 300,000 tons in 2005, which is the result of shifting from producing fresh/chilled meat to cooked or processed meat for export. Import bans on Thai fresh/chilled poultry meat is the principal factor underlying this shift in production. Thai broiler production in 2005 is forecast to increase by 3 percent to 950,000 tons. This increase is supported by the 16 percent growth consumption most prominently attributed to falling domestic prices. High stock levels in leg-quarters and increases in production are depressing boiler meat prices, making it more accessible to price-sensitive consumers. Given the severity of HPAI outbreaks, its implications to food safety, and the growing global concern with biosecurity, it is highly unlikely that countries will lift import bans on Thai fresh poultry meat in 2005. In fact, the recent reoccurrence of HPAI in July 2004 could indicate that the disease is becoming endemic in Thailand.

- **China:** China's broiler meat exports for 2005 are forecast to recover by 20 percent to 300,000 tons due to an increase in demand from Japan. Under China's poultry trade protocol agreement with Japan, China is allowed to export cooked poultry meat. The protocol provided a powerful incentive to install cooking facilities in the Chinese poultry processing plants for export to Japan. In January- August 2004, Chinese broiler meat exports to Japan were 76,000 tons. China's broiler meat exports have traditionally, but no longer include U.S. broiler meat that had been processed or deboned for re-export to Japan. China is seeking USDA approval to export cooked poultry to the United States, which could lead to an expansion in China's broiler meat exports overall. In 2005, broiler production is forecast to increase by 3 percent to nearly 10 million tons due in part to recovery from AI outbreaks in 2003 and 2004.
- **Canada:** In 2005, Canada's broiler meat exports are forecast at 75,000 tons, a 7-percent increase from the previous year. Canadian broiler meat production experienced a shock in February 2004, when HPAI outbreaks hit the Fraser Valley area of Southern British Columbia (BC). BC's share of national poultry and egg output is approximately 16 percent for chicken, 11 percent for turkey and 12 percent for eggs. Canadian broiler meat production in the first seven months of 2004 fell only by 2 percent, as other broiler producing regions in Canada increased production to offset the significant depopulation in BC. Due to import-bans placed on Canadian poultry products, from January-August 2004, Canadian broiler meat exports to the world fell 20 percent from the previous year. In 2003, Canada's major export markets for broiler meat included the United States, South Africa, Russia, China and Cuba.
- **Argentina:** Argentine broiler meat exports for 2005 are projected at 90,000 tons, a record-level high. Increased profitability due to favorable exchange rates, new market opportunities, moderately good sanitary conditions, and heavy investment in plant and equipment are the foundation for record exports. Argentina's export growth can also be attributed to good feed grain crops in recent years and steady recovery from the 2002 economic crisis. In 2004, Argentine broiler meat exports are forecast to nearly double; in January-August 2004 exports have risen 51 percent. In 2004, Argentina's top export markets include China, Chile, Saudi Arabia and South Africa. Through trade agreements and aggressive marketing efforts, Argentina is focusing export expansion efforts on import-dependent markets, such as Mexico, South Korea, and Japan. Broiler production for 2005 is forecast at a record 990,000 tons.

Key Importers:

- **Russia:** Russian broiler meat imports are forecast to decrease by 7 percent in 2005 in anticipation that problems with implementing the poultry tariff rate quota (TRQ) and licensing continue. The forecast for 2004 Russian imports assumes the United States and the European Union will not completely fill its quota. In the case of the United States, although Russia did not implement a full country ban on its major supplier, in 2004, imports were greatly affected by the delisting of U.S. plants and the delayed distribution of TRQ licenses in later part of 2003. In the case of the European Union, the delay was due in part to a re-inspection of new EU member plants in the late summer and strict quarantine requirements. As broiler meat prices rose due to tighter

supplies, Russian importers shifted imports to lower quality spent hen or cheaper turkey meat. Russian broiler meat production is forecast to grow 13 percent in 2005 sustained by continued investment in the sector, high demand and high domestic prices.

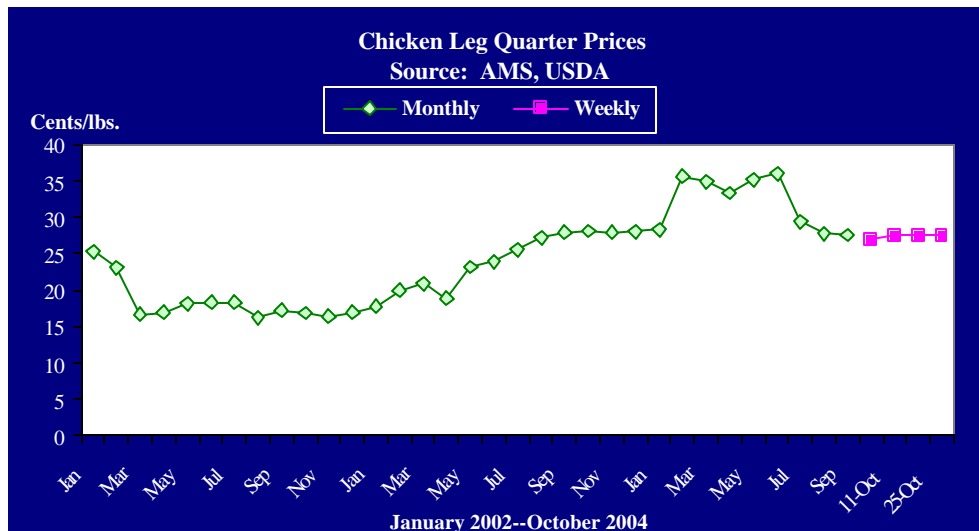
- **European Union-25:** In 2004, production is expected to recover following outbreaks of AI in 2003 in the Netherlands and Belgium. EU broiler meat imports in 2004 are forecast to drop 9 percent from the previous year to 305,000 tons and decline another 2 percent in 2005 to 300,000 tons. Brazil has adapted to the European Union's new tariff classification on processed broilers in brine and is competing in the cooked product sector against Thai product. Consumption is expected to grow marginally in 2004 and 2005 as consumers substitute poultry for beef due to higher beef prices. In the first six months of 2004, Thailand held on to 26 percent of the market share for broiler meat import in the European Union.

NOTE: The complete PSD data series for the EU has been modified to account for the 10 new members. Please refer to "Notes on European Data" on page 29 for details.

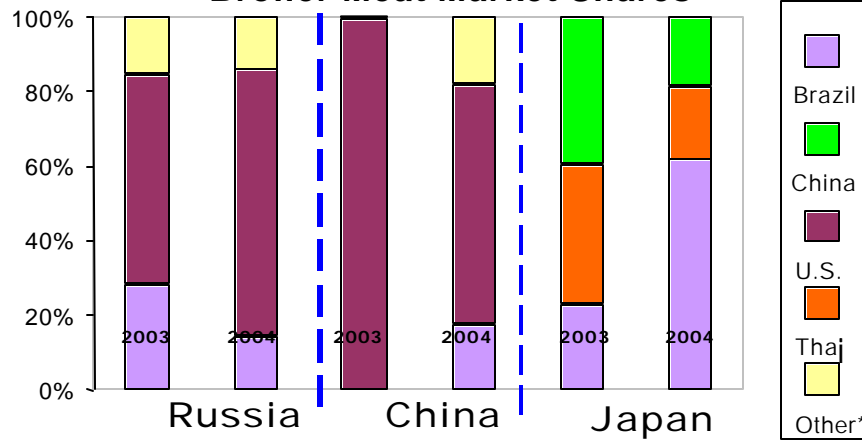
- **Canada:** Due to AI outbreaks in the early part of 2004, Canada initiated a special supplementary import provision to the TRQ in order to facilitate additional imports to offset declines in domestic production. Broiler meat imports for 2004 are forecast to increase 60 percent to 130,000 tons. Although Canada recognizes Brazil as an eligible meat exporter, Brazil has not established a strong export market in Canada and only exported 9,000 tons of frozen broiler meat in January-July 2004. In 2003, Canada imported 15 percent more U.S. broiler meat than the previous year. Canadian broiler meat imports primarily consist of fresh and chilled chicken cuts and edible offal for further processing.
- **Japan:** In 2005, Japan broiler meat imports are projected to grow in 2005 by 6 percent to 530,000 tons, after an expected 28-percent decrease in 2004. Additionally, import bans are likely to continue limiting the supply availability and result high prices. Consumption is expected to rise slightly in 2005, keeping market prices relatively stable. Brazil is expected to maintain its large market share for broiler meat in 2005, while imports from the United States are expected to rebound from import bans partially lifted in July and October of 2004. Imports of cooked product from Thailand and China are expected to rise in 2005.
- **China:** Following an expected 51-percent decline in imports in 2004 due to market and trade disruptions resulting from AI, imports in 2005 are forecast to rise 36 percent to 300,000 tons due in part to improvements in consumer demand. The forecast assumes no U.S. broiler meat imports in 2005 because there has been no change in the AI import ban policy. Brazil and Argentina have positioned themselves in the Chinese markets as the leading suppliers taking market share for bone-in broiler meat from the United States. China expects to implement new import regulations in November 2004 that requires all meat and poultry products re-exported through Hong Kong be pre-inspected by a Hong Kong Inspection company. This

regulatory change is aimed at keeping South American broiler meat, which is has been frequently relabeled as U.S. product from entering the Chinese market.

- Saudi Arabia:** Broiler meat imports are estimated to reach 443,000 tons in 2005, a 2-percent increase from the previous year. The main reason for the boost of Saudi broiler meat demand is the increase in pilgrims expected to visit Mecca in 2005. Despite various government subsidies provided to the local poultry industry, Saudi producers claim to have difficulty competing with imports. From January-June of 2004 Brazilian broiler meat imports surged after an import ban was placed on Chinese poultry meat. At the same time, imports from France significantly declined due to lower French production and a strengthening of the Euro in relation to U.S. exchange rates (Saudi Riyal is fixed at a rate of 3.75 to the U.S. dollar).
- Mexico:** Broiler meat imports for 2004 are forecast to increase 6 percent to 356,000 tons and another 2 percent in 2005 to 364,000 tons. There is strong demand for Mechanically Separated Meat (MSM) among Mexico's food and meat processors. MSM and turkey parts for use in sausage and processed deli meats are the main poultry products imported by Mexico. Broiler meat demand continues to increase due to its relatively lower price compared to red meat. The lifting of sanitary restrictions by Mexico due to AI outbreaks in the United States is expected to improve overall Mexican broiler meat imports in 2004 and 2005. Traders along the Mexican border (southern and northern), are optimistic about filling the 101,000-ton import quota for leg quarters in 2004.



Shifts in Competitors in Selected Major Broiler Meat Market-Shares



* Other: Includes Argentina and Canada; accounts for the largest market shares in this aggregate.

Note: Market shares based on 2003-04 Jan-Jun import statistics as reported by Russia, China and Japan.

Broiler Summary Selected Countries

1,000 Metric Tons (Ready to Cook Equivalent)

	2000	2001	2002	2003	2004 (p)	2005 (f)
Production						
China, Peoples Republic of	9,269	9,278	9,558	9,898	9,700	9,990
Brazil	5,980	6,567	7,449	7,645	8,105	8,620
European Union 1/	7,606	7,883	7,788	7,520	7,695	7,745
Mexico	1,936	2,067	2,157	2,290	2,400	2,520
India	1,080	1,250	1,400	1,600	1,650	1,800
Japan	1,091	1,074	1,107	1,127	1,130	1,135
Argentina	870	870	640	750	900	990
Thailand	1,070	1,230	1,275	1,340	920	950
Canada	877	927	932	929	920	938
Malaysia	786	813	784	835	850	910
Others 2/	6,206	6,248	6,508	5,624	5,651	5,937
Total Foreign	36,771	38,207	39,598	39,558	39,921	41,535
United States	13,703	14,033	14,467	14,696	15,312	15,807
World Total	50,474	52,240	54,065	54,254	55,233	57,342

Consumption						
China, Peoples Republic of	9,393	9,237	9,556	9,963	9,670	9,990
European Union 1/	6,934	7,309	7,108	7,064	7,195	7,270
Brazil	5,110	5,341	5,872	5,742	5,850	6,140
Mexico	2,162	2,310	2,424	2,626	2,755	2,883
India	1,080	1,250	1,400	1,600	1,649	1,799
Japan	1,772	1,797	1,830	1,841	1,645	1,660
Russian Federation	1,320	1,588	1,697	1,680	1,584	1,585
Canada	893	925	928	939	980	982
Malaysia	812	846	821	868	881	942
Saudi Arabia	815	884	870	873	890	913
Others 2/	7,599	7,629	7,565	6,855	6,692	7,082
Total Foreign	37,890	39,116	40,071	40,051	39,791	41,246
United States	11,474	11,558	12,269	12,539	13,305	13,748
World Total	49,364	50,674	52,340	52,590	53,096	54,994

Source: Counselor and attache reports, official statistics, and results of office research.

Notes: 1/ The data series was revised to represent EU-25 member states.

2/ For 2003, Colombia and Egypt are dropped from the database.

(p) preliminary, (f) forecast

Broiler Summary Selected Countries

1,000 Metric Tons (Ready to Cook Equivalent)

	2000	2001	2002	2003	2004 (p)	2005 (f)
Imports /3						
Russian Federation	943	1,281	1,208	1,081	930	870
Japan	721	710	744	695	500	530
Saudi Arabia	348	399	380	430	435	443
Mexico	227	244	267	337	356	364
China, Peoples Republic of	588	448	436	453	220	300
European Union 1/	177	190	197	337	305	300
United Arab Emirates	111	123	136	168	180	182
Hong Kong	168	183	164	154	200	160
Ukraine	25	64	61	88	130	150
Canada	70	74	80	81	130	115
Others 2/	436	383	399	474	407	394
Total Foreign	3,814	4,099	4,072	4,298	3,793	3,808
World Total	3,814	4,099	4,072	4,298	3,793	3,808
Exports /3						
Brazil	870	1,226	1,577	1,903	2,255	2,480
European Union 1/	849	764	877	793	805	775
China, Peoples Republic of	464	489	438	388	250	300
Thailand	328	425	462	527	255	300
Argentina	11	13	23	39	75	90
Canada	54	69	84	76	70	75
United Arab Emirates	20	20	37	40	40	42
Saudi Arabia	16	20	20	25	25	25
Australia	13	19	15	15	16	15
Romania	1	1	4	5	7	10
Others 2/	32	28	30	28	24	26
Total Foreign	2,658	3,074	3,567	3,839	3,822	4,138
United States	2,231	2,520	2,180	2,232	1,976	2,087
World Total	4,889	5,594	5,747	6,071	5,798	6,225

Source: Counselor and attache reports, official statistics, and results of office research.

Notes: 1/ The data series was revised to represent EU-25 member states.

2/ For 2003, Colombia and Egypt are dropped from the database.

3/ As of 1997, chicken feet / paws are not included in trade data.

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

Turkey Summary Selected Countries

1,000 Metric Tons (Ready to Cook Equivalent)

	2000	2001	2002	2003	2004 (p)	2005 (f)
Production						
European Union 1/	2,019	2,098	2,102	2,024	2,030	2,020
Brazil	137	165	182	200	220	250
Canada	152	149	147	148	147	147
Mexico	12	13	13	14	17	17
Russian Federation	7	7	9	12	15	17
South Africa, Republic of	3	4	3	4	5	5
Taiwan	5	5	5	4	4	4
Others 2/	90	3	0	0	0	0
Total Foreign	2,425	2,444	2,461	2,406	2,438	2,460
United States	2,419	2,490	2,557	2,529	2,414	2,496
World Total	4,844	4,934	5,018	4,935	4,852	4,956
Consumption						
European Union 1/	1,818	1,931	1,910	1,914	1,930	1,935
Mexico	146	157	154	170	183	189
Canada	137	135	143	138	136	133
Russian Federation	170	171	174	126	85	97
Brazil	93	96	92	89	92	95
South Africa, Republic of	24	19	16	32	30	27
Taiwan	20	13	16	20	20	22
Others 2/	122	36	16	0	0	0
Total Foreign	2,530	2,558	2,521	2,489	2,476	2,498
United States	2,223	2,269	2,316	2,300	2,257	2,281
World Total	4,753	4,827	4,837	4,789	4,733	4,779

Source: Counselor and attache reports, official statistics, and results of office research.

Note: 1/ The data series was revised to represent EU-25 member states.

2/ For 2003, Hong Kong, Korea, and Malaysia are dropped from the database.

(p) preliminary, (f) forecast

Turkey Summary Selected Countries

1,000 Metric Tons (Ready to Cook Equivalent)

	2000	2001	2002	2003	2004 (p)	2005 (f)
Imports						
Mexico	142	152	147	158	168	173
Russian Federation	163	164	165	114	70	80
European Union 1/	41	64	64	77	70	70
South Africa, Republic of	21	15	13	28	25	22
Taiwan	15	8	11	16	16	18
Canada	4	5	7	8	7	9
Others 2/	37	26	16	0	0	0
Total Foreign	423	434	423	401	356	372
United States	0	0	0	1	2	2
World Total	423	434	423	402	358	374
Exports						
Brazil	44	69	90	111	128	155
European Union 1/	242	231	256	187	170	155
Canada	14	14	16	16	20	25
Mexico	8	8	6	2	2	1
Bulgaria	1	1	0	0	0	0
Israel	6	0	0	0	0	0
Others 2/	0	0	0	0	0	0
Total Foreign	315	323	368	316	320	336
United States	202	221	199	220	195	206
World Total	517	544	567	536	515	542

Source: Counselor and attache reports, official statistics, and results of office research.

Note: 1/ The data series was revised to represent EU-25 member states.

2/ For 2003, Hong Kong, Korea, and Malaysia are dropped from the database.

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

Notes on European Union Data

On May 1, 2004, ten new member states joined the European Union (EU), increasing EU membership from fifteen to twenty-five countries. With the ten acceding member states, the new EU-25 now encompasses 455 million people and land area of over 1.5 million square miles. While this accession is unprecedented in scope, EU enlargement is not a new concept. There have been four other enlargements since the original six signatories of the Treaty of Rome established the European Economic Community in 1958.

1958 – France, Germany, Italy, Belgium, Netherlands, Luxembourg

1973 – Denmark, Ireland, and the United Kingdom

1981 – Greece

1986 – Spain and Portugal

1995 – Austria, Finland and Sweden

2004 – Cyprus, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia and Slovenia

Conditions for membership are broadly outlined in the 1993 Maastricht Treaty, which notes (in Article 49) that any European state, which respects the principles of liberty, democracy, human rights, fundamental freedoms, and the rule of law may apply to join the EU. These conditions are further defined by the “Copenhagen criteria.”

All new member states are expected to adopt the so-called *acquis communautaire*, the approximately 80,000 pages of EU law, which set the framework for EU membership. Bulgaria and Romania are expected to join the EU in 2007. Croatia will begin membership negotiations in 2005. No timetable has yet been set for Turkey and the former Yugoslav Republic of Macedonia.

In 2001, the U.S. Department of Agriculture (USDA) began to consolidate data from individual EU member states into single EU data sets. Starting with the October 2001 Foreign Agricultural Service Circular issue of Livestock and Poultry: World Markets and Trade (FAS DLP 2-01), EU data for livestock, poultry, and meat were reported as a single (EU-15) entity in the production, supply, and distribution (PSD) database. At the same time, data sets for individual member states were discontinued. For beef and pork, the EU-15 historical data series prior to the year 2000 were based on individual member state data. For poultry, EU-15 data for the years prior to 1997 were derived from individual member state data. After 1997 (for poultry), and after 2000 (for beef and pork), the EU-15 historical data sets were based on *Eurostat* data.

The newly expanded EU-25 presents a significant challenge in maintaining consistency with existing historical data sets. Only three of the ten new member states (Poland, Hungary and the Czech Republic) have historically scheduled USDA livestock and/or poultry annual reports. The fact that EU accession occurred in the fifth month of the calendar year adds a further complication. Beginning with this publication, USDA data will consider the full EU-25 membership for the 2004 and 2005 forecasts. Furthermore, in order to provide 5-year historical data sets (1999-2003), data for the EU-15 and the

CEEC-10 have been aggregated to form the new EU-25 data series. After 1999, the EU-15 data series are discontinued.

European Union Consolidated PSD Tables – CATTLE (1,000 Head)

EU-15

	Total Begin Stock	Dairy Begin Stock	Beef Begin Stock	Production (Calf Crop)	Imports	Total Supply	Exports	Cow Slaughter	Calf Slaughter	Other Slaughter	Total Slaughter	Animal Losses	Ending Stocks	Total Distribution
1999	82,850	21,820	12,070	29,392	0	112,242	321	7,350	7,250	12,900	27,500	2,695	82,235	112,751
2000	82,235	21,784	12,067	28,363	0	110,598	288	7,330	7,226	12,504	27,060	2,404	81,337	111,089
2001	81,337	21,552	12,112	27,572	0	108,909	168	6,823	6,941	11,466	25,230	3,768	80,184	109,350
2002	80,184	20,488	13,085	27,149	2	107,335	249	7,070	5,538	14,035	26,643	1,996	78,944	107,832
2003	78,944	20,149	13,425	26,901	5	105,850	221	6,836	5,420	13,912	26,168	2,487	77,506	106,382
2004 (p)	77,506	19,803	13,444	26,830	2	104,338	211	6,660	5,380	14,110	26,150	2,215	76,300	104,876
2005 (f)	76,300	19,525	13,320	26,600	2	102,902	180	6,585	5,345	13,925	25,855	2,115	75,300	103,450

CEEC-10

	Total Begin Stock	Dairy Begin Stock	Beef Begin Stock	Production (Calf Crop)	Imports	Total Supply	Exports	Cow Slaughter	Calf Slaughter	Other Slaughter	Total Slaughter	Animal Losses	Ending Stocks	Total Distribution
1999	11,747	4,980	420	5,177	15	16,939	170	348	797	3,473	4,618	380	11,262	16,430
2000	11,262	4,802	417	4,872	50	16,184	175	392	712	3,270	4,374	446	10,698	15,693
2001	10,698	4,580	404	4,645	45	15,388	217	331	762	2,817	3,910	452	10,368	14,947
2002	10,368	4,406	410	4,526	14	14,908	320	287	615	2,511	3,413	437	10,241	14,411
2003	10,241	4,358	433	4,443	18	14,702	239	483	618	2,384	3,485	314	10,132	14,170
2004 (p)	10,132	4,250	452	4,300	23	14,455	184	445	620	2,330	3,395	333	10,005	13,917
2005 (f)	10,005	4,160	475	4,220	28	14,253	45	405	620	2,370	3,395	325	9,940	13,705

EU-25

	Total Begin Stock	Dairy Begin Stock	Beef Begin Stock	Production (Calf Crop)	Imports	Total Supply	Exports	Cow Slaughter	Calf Slaughter	Other Slaughter	Total Slaughter	Animal Losses	Ending Stocks	Total Distribution
1999	94,597	26,800	12,490	34,569	15	129,181	491	7,698	8,047	16,373	32,118	3,075	93,497	129,181
2000	93,497	26,586	12,484	33,235	50	126,782	463	7,722	7,938	15,774	31,434	2,850	92,035	126,782
2001	92,035	26,132	12,516	32,217	45	124,297	385	7,154	7,703	14,283	29,140	4,220	90,552	124,297
2002	90,552	24,894	13,495	31,675	16	122,243	569	7,357	6,153	16,546	30,056	2,433	89,185	122,243
2003	89,185	24,507	13,858	31,344	23	120,552	460	7,319	6,038	16,296	29,653	2,801	87,638	120,552
2004 (p)	87,638	24,053	13,896	31,130	25	118,793	395	7,105	6,000	16,440	29,545	2,548	86,305	118,793
2005 (f)	86,305	23,685	13,795	30,820	30	117,155	225	6,990	5,965	16,295	29,250	2,440	85,240	117,155

Note: EU-15 and CEEC-10 PSD Tables exclude intra-trade and therefore do not balance.

(p) – projected (f) – forecast

European Union Consolidated PSD Tables – BEEF (1,000 MT CWE)

EU-15						Consumption					
	Slaughter (reference)	Beginning Stocks	Production	Imports	Total Supply	Exports	Human Domestic	Other Use Losses	Total	Ending Stocks	Total Distribution
1999	27,500	803	7,569	435	8,807	973	7,435	0	7,435	400	8,808
2000	27,060	400	7,462	424	8,286	618	6,914	413	7,327	339	8,284
2001	25,230	339	6,896	394	7,629	565	6,381	443	6,824	249	7,638
2002	26,643	249	7,456	497	8,202	494	7,412	100	7,512	204	8,210
2003	26,168	204	7,350	513	8,067	386	7,694	0	7,694	10	8,090
2004 (p)	26,150	10	7,355	520	7,885	360	7,550	0	7,550	0	7,910
2005 (f)	25,855	0	7,280	530	7,810	320	7,520	0	7,520	0	7,840

CEEC-10						Consumption					
	Slaughter (reference)	Beginning Stocks	Production	Imports	Total Supply	Exports	Human Domestic	Other Use Losses	Total	Ending Stocks	Total Distribution
1999	4,618	15	877	1	893	29	835	5	840	23	892
2000	4,374	23	791	2	816	27	761	5	766	25	818
2001	3,910	25	733	0	758	30	665	0	665	54	749
2002	3,413	54	682	4	740	92	606	0	606	34	732
2003	3,485	34	695	4	733	51	630	0	630	29	710
2004 (p)	3,394	29	680	5	714	50	625	0	625	14	689
2005 (f)	3,396	14	635	5	654	50	564	0	564	10	624

EU-25						Consumption					
	Slaughter (reference)	Beginning Stocks	Production	Imports	Total Supply	Exports	Human Domestic	Other Use Losses	Total	Ending Stocks	Total Distribution
1999											
2000	32,118	818	8,446	436	9,700	1,002	8,270	5	8,275	423	9,700
2001	31,434	423	8,253	426	9,102	645	7,675	418	8,093	364	9,102
2002	29,140	364	7,629	394	8,387	595	7,046	443	7,489	303	8,387
2003	30,056	303	8,138	501	8,942	586	8,018	100	8,118	238	8,942
2004 (p)	29,653	238	8,045	517	8,800	437	8,324	0	8,324	39	8,800
2005 (f)	29,545	39	8,035	525	8,599	410	8,175	0	8,175	14	8,599
2005 (f)	29,250	14	7,915	535	8,464	370	8,084	0	8,084	10	8,464

Note: EU-15 and CEEC-10 PSD Tables exclude intra-trade and therefore do not balance.

(p) – projected (f) – forecast

European Union Consolidated PSD Tables – SWINE (1,000 Head)

EU-15

	Total Begin Stock	Sow Begin Stock	Production (Pig Crop)	Imports	Total Supply	Exports	Sow Slaughter	Other Slaughter	Total Slaughter	Animal Losses	Ending Stocks	Total Distribution
1999	118,918	12,005	225,301	0	344,219	16	3,458	205,449	208,907	10,260	125,035	344,218
2000	125,035	11,926	212,927	0	337,962	18	3,357	200,281	203,638	11,092	123,261	338,009
2001	123,261	11,568	213,693	0	336,954	16	3,250	198,248	201,498	13,256	122,191	336,961
2002	122,191	11,694	215,529	0	337,720	79	3,690	199,106	202,796	12,574	122,222	337,671
2003	122,222	11,565	213,854	0	336,076	85	3,419	201,384	204,803	9,725	121,513	336,126
2004 (p)	121,513	11,383	213,180	0	334,693	60	3,390	200,040	203,430	9,363	121,890	334,743
2005 (f)	121,890	11,332	213,500	0	335,390	65	3,385	200,985	204,370	8,900	122,100	335,435

CEEC-10

	Total Begin Stock	Sow Begin Stock	Production (Pig Crop)	Imports	Total Supply	Exports	Sow Slaughter	Other Slaughter	Total Slaughter	Animal Losses	Ending Stocks	Total Distribution
1999	33,088	2,886	42,789	7	75,884	309	458	40,034	40,492	3,585	31,499	75,885
2000	31,499	2,674	40,359	7	71,865	436	580	37,350	37,930	3,888	29,564	71,818
2001	29,564	2,567	41,371	7	70,942	362	500	36,146	36,646	3,645	30,282	70,935
2002	30,282	2,721	44,485	7	74,774	276	458	38,180	38,638	3,820	32,089	74,823
2003	32,089	2,689	43,418	7	75,514	319	468	39,840	40,308	3,781	31,056	75,464
2004 (p)	31,056	2,520	41,320	7	72,383	240	459	38,035	38,495	3,518	30,080	72,333
2005 (f)	30,080	2,618	42,870	7	72,957	255	460	38,510	38,970	3,367	30,320	72,912

EU-25

	Total Begin Stock	Sow Begin Stock	Production (Pig Crop)	Imports	Total Supply	Exports	Sow Slaughter	Other Slaughter	Total Slaughter	Animal Losses	Ending Stocks	Total Distribution
1999	152,006	14,891	268,090	7	420,103	325	3,916	245,483	249,399	13,845	156,534	420,103
2000	156,534	14,600	253,286	7	409,827	454	3,937	237,631	241,568	14,980	152,825	409,827
2001	152,825	14,135	255,064	7	407,896	378	3,750	234,394	238,144	16,901	152,473	407,896
2002	152,473	14,415	260,014	7	412,494	355	4,148	237,286	241,434	16,394	154,311	412,494
2003	154,311	14,254	257,272	7	411,590	404	3,887	241,224	245,111	13,506	152,569	411,590
2004 (p)	152,569	13,903	254,500	7	407,076	300	3,850	238,075	241,925	12,881	151,970	407,076
2005 (f)	151,970	13,950	256,370	7	408,347	320	3,845	239,495	243,340	12,267	152,420	408,347

Note: EU-15 and CEEC-10 PSD Tables exclude intra-trade and therefore do not balance.

(p) – projected (f) – forecast

European Union Consolidated PSD Tables – PORK (1,000 MT CWE)

EU-15	Slaughter (reference)	Beginning Stocks	Production	Imports	Total Supply	Exports	Consumption			Ending Stocks	Total Distribution
							Human Domestic	Other Use Losses	Total		
1999	208,907	0	18,059	12	18,071	1,484	16,519	0	16,519	0	18,003
2000	203,638	0	17,585	11	17,596	1,288	16,210	0	16,210	0	17,498
2001	201,498	0	17,419	15	17,434	977	16,377	0	16,377	0	17,354
2002	202,796	0	17,780	12	17,792	1,023	16,612	0	16,612	25	17,660
2003	204,803	25	17,928	12	17,965	1,045	16,813	0	16,813	0	17,858
2004 (p)	203,430	0	17,850	13	17,863	1,085	16,680	0	16,680	0	17,765
2005 (f)	204,370	0	17,950	13	17,963	1,060	16,790	0	16,790	0	17,850

CEEC-10	Slaughter (reference)	Beginning Stocks	Production	Imports	Total Supply	Exports	Consumption			Ending Stocks	Total Distribution
							Human Domestic	Other Use Losses	Total		
1999	40,492	86	3,347	8	3,441	272	3,040	96	3,136	101	3,509
2000	37,930	101	3,132	8	3,241	234	2,959	73	3,032	73	3,339
2001	36,646	73	3,008	7	3,088	158	2,900	40	2,940	70	3,168
2002	38,638	70	3,158	5	3,233	135	3,104	30	3,134	96	3,365
2003	40,308	96	3,315	10	3,421	280	3,188	0	3,188	58	3,526
2004 (p)	38,495	58	3,151	5	3,214	165	3,121	0	3,121	26	3,312
2005 (f)	38,970	26	3,158	5	3,189	106	3,169	0	3,169	27	3,302

EU-25	Slaughter (reference)	Beginning Stocks	Production	Imports	Total Supply	Exports	Consumption			Ending Stocks	Total Distribution
							Human Domestic	Other Use Losses	Total		
1999	249,399	86	21,406	20	21,512	1,756	19,559	96	19,655	101	21,512
2000	241,568	101	20,717	19	20,837	1,522	19,169	73	19,242	73	20,837
2001	238,144	73	20,427	22	20,522	1,135	19,277	40	19,317	70	20,522
2002	241,434	70	20,938	17	21,025	1,158	19,716	30	19,746	121	21,025
2003	245,111	121	21,243	22	21,386	1,325	20,003	0	20,003	58	21,386
2004 (p)	241,925	58	21,001	18	21,077	1,250	19,801	0	19,801	26	21,077
2005 (f)	243,340	26	21,108	18	21,152	1,166	19,959	0	19,959	27	21,152

Note: EU-15 and CEEC-10 PSD Tables exclude intra-trade and therefore do not balance.

(p) – projected (f) – forecast

European Union Consolidated PSD Tables – BROILERS (1,000 MT)

				Consumption					
	Production	Imports	Total Supply	Exports	Human Domestic	Other Use Losses	Total	Ending Stocks	Total Distribution
EU-15									
1999	6,614	127	6,741	838	5,917	0	5,917	0	6,755
2000	6,654	134	6,788	829	5,943	0	5,943	0	6,772
2001	6,822	157	6,979	744	6,206	0	6,206	0	6,950
2002	6,750	167	6,917	849	6,037	0	6,037	0	6,886
2003	6,340	296	6,636	751	5,875	0	5,875	0	6,626
2004 (p)	6,495	260	6,755	760	6,000	0	6,000	0	6,760
2005 (f)	6,525	260	6,785	725	6,065	0	6,065	0	6,790

				Consumption					
	Production	Imports	Total Supply	Exports	Human Domestic	Other Use Losses	Total	Ending Stocks	Total Distribution
CEEC-10									
1999									
2000	925	53	978	27	937	0	937	0	964
2001	952	43	995	20	991	0	991	0	1,011
2002	1,061	33	1,094	20	1,103	0	1,103	0	1,123
2003	1,038	30	1,068	28	1,071	0	1,071	0	1,099
2004 (p)	1,180	41	1,221	42	1,189	0	1,189	0	1,231
2005 (f)	1,200	45	1,245	45	1,195	0	1,195	0	1,240
	1,220	40	1,260	50	1,205	0	1,205	0	1,255

				Consumption					
	Production	Imports	Total Supply	Exports	Human Domestic	Other Use Losses	Total	Ending Stocks	Total Distribution
EU-25									
1999									
2000	7,539	180	7,719	865	6,854	0	6,854	0	7,719
2001	7,606	177	7,783	849	6,934	0	6,934	0	7,783
2002	7,883	190	8,073	764	7,309	0	7,309	0	8,073
2003	7,788	197	7,985	877	7,108	0	7,108	0	7,985
2004 (p)	7,520	337	7,857	793	7,064	0	7,064	0	7,857
2005 (f)	7,695	305	8,000	805	7,195	0	7,195	0	8,000
	7,745	300	8,045	775	7,270	0	7,270	0	8,045

Note: EU-15 and CEEC-10 PSD Tables exclude intra-trade and therefore do not balance.

(p) – projected (f) – forecast

European Union Consolidated PSD Tables – TURKEY (1,000 MT)

EU-15	Production			Consumption				Ending Stocks		Total Distribution
	Production	Imports	Total Supply	Exports	Human Domestic	Other Use Losses	Total	Ending Stocks		
1999	1,830	24	1,854	226	1,640	0	1,640	0	1,866	
2000	1,740	34	1,774	235	1,553	0	1,553	0	1,788	
2001	1,777	52	1,829	225	1,606	0	1,606	0	1,831	
2002	1,755	55	1,810	248	1,571	0	1,571	0	1,819	
2003	1,660	70	1,730	177	1,582	0	1,582	0	1,759	
2004 (p)	1,655	60	1,715	160	1,590	0	1,590	0	1,750	
2005 (f)	1,640	60	1,700	145	1,595	0	1,595	0	1,740	

CEEC-10	Production			Consumption				Ending Stocks		Total Distribution
	Production	Imports	Total Supply	Exports	Human Domestic	Other Use Losses	Total	Ending Stocks		
1999	270	6	276	14	250	0	250	0	264	
2000	279	7	286	7	265	0	265	0	272	
2001	321	12	333	6	325	0	325	0	331	
2002	347	9	356	8	339	0	339	0	347	
2003	364	7	371	10	332	0	332	0	342	
2004 (p)	375	10	385	10	340	0	340	0	350	
2005 (f)	380	10	390	10	340	0	340	0	350	

EU-25	Production			Consumption				Ending Stocks		Total Distribution
	Production	Imports	Total Supply	Exports	Human Domestic	Other Use Losses	Total	Ending Stocks		
1999	2,100	30	2,130	240	1,890	0	1,890	0	2,130	
2000	2,019	41	2,060	242	1,818	0	1,818	0	2,060	
2001	2,098	64	2,162	231	1,931	0	1,931	0	2,162	
2002	2,102	64	2,166	256	1,910	0	1,910	0	2,166	
2003	2,024	77	2,101	187	1,914	0	1,914	0	2,101	
2004 (p)	2,030	70	2,100	170	1,930	0	1,930	0	2,100	
2005 (f)	2,020	70	2,090	155	1,935	0	1,935	0	2,090	

Note: EU-15 and CEEC-10 PSD Tables exclude intra-trade and therefore do not balance.

(p) – projected (f) – forecast

EU-15 Trade with the CEEC-10

	Cattle 1,000 Head		Beef 1,000 MT CWE		Swine 1,000 Head		Pork 1,000 MT CWE	
	EU-15		EU-15		EU-15		EU-15	
	Intra-trade with CEEC-10		Intra-trade with CEEC-10		Intra-trade with CEEC-10		Intra-trade with CEEC-10	
	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports
1999	10	519	21	22	27	26	113	45
2000	12	503	26	24	13	60	137	39
2001	1	442	10	19	29	36	121	41
2002	10	507	18	26	77	28	172	40
2003	9	546	15	38	22	72	161	56
2004 (p)	10	550	25	50	20	70	170	72
2005 (f)	10	560	30	60	25	70	190	77

	Broilers 1,000 MT		Turkey 1,000 MT	
	EU-15		EU-15	
	Intra-trade with CEEC-10		Intra-trade with CEEC-10	
	Exports	Imports	Exports	Imports
1999	30	44	8	20
2000	57	41	13	27
2001	72	43	32	34
2002	75	44	24	33
2003	73	63	19	48
2004 (p)	75	80	15	50
2005 (f)	80	85	15	55

Note: EU-15 and CEEC-10 PSD Tables exclude intra-trade and therefore do not balance.

(p) – projected (f) – forecast