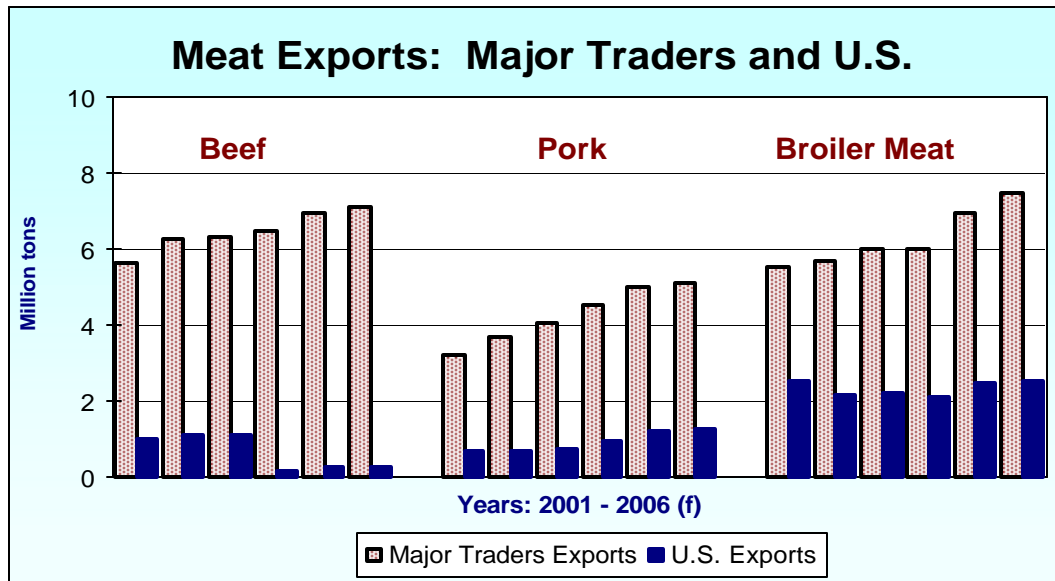




Livestock and Poultry: World Markets and Trade

2006: Another Year of Record Trade in Red and Poultry Meat Forecasted



Source: Production, Supply and Distribution Database, FAS

Trade of beef, pork and poultry by major exporters is forecast to reach record levels in 2006 despite the instability of continued disease outbreaks and their resulting trade restrictions.

While avian influenza (AI) in Asia and Russia, foot and mouth disease (FMD) in Brazil, as well as trade restrictions on U.S. and Canadian beef due to bovine spongiform encephalopathy (BSE) have undoubtedly impacted global trade and will continue to be a cause of concern, meat consumption among major consuming countries continues to climb spurring increased production and growth in exports.

For the first time in history, broiler meat exports by major traders are forecast to reach 7.5 million tons. Poultry demand is expected to be strong due to the absence of the United States in major beef markets and constraints on growth in Brazilian beef exports.

2006: Key Developments and Factors Impacting Livestock and Meat Production, Supply and Distribution

- Positive macroeconomic growth will continue to encourage investment and increase consumer demand.
- Red meat and poultry meat prices for major exporters influenced by disease related trade distortions.
- Favorable exchange rate enables U.S. to remain price competitive.
- FMD in Brazil will have minimal impact on current meat trade flows.
- Broiler meat exports to surpass beef exports by major traders.

Note: PSD numbers for the United States included in this document have been revised from November 3, 2005 release to reflect the WASDE release of November 10, 2005. PSD Online (<http://www.fas.usda.gov/psd/>) has also been updated to reflect these updated United States numbers.

Livestock and Poultry: World Markets and Trade

November 2005

Table of Contents

Summary: Major Traders and U.S. Trade of Beef, Pork, and Poultry.....	3
Overview	
Key Developments and Factors	4
Production.....	5
Consumption.....	11
Trade.....	13
Summary Tables	
Beef Summary Table.....	19
Pork Summary Table.....	21
Broiler Summary Table.....	23
Turkey Summary Table.....	25
Notes to Readers	27
USDA-FAS Dairy Livestock and Poultry Division Contacts.....	31

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

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

	2001	2002	2003	2004	2005 (p)	2006 (f)	Percent Change 2005 to 2006
Production							
Beef and Veal /1	49,646	51,241	50,095	51,293	51,978	53,376	2.7%
Pork /1	83,578	86,451	88,866	90,678	92,537	95,167	2.8%
Broiler and Turkey /2	57,093	59,018	59,003	60,747	63,192	65,604	3.8%
Total	190,317	196,710	197,964	202,718	207,707	214,147	3.1%
Consumption							
Beef and Veal /1	48,708	50,265	49,017	49,757	50,135	51,459	2.6%
Pork /1	83,459	86,387	88,812	90,237	91,605	94,208	2.8%
Broiler & Turkey /2	55,452	57,169	57,259	58,720	60,595	62,550	3.2%
Total	187,619	193,821	195,088	198,714	202,335	208,217	2.9%
Imports							
Beef and Veal /1	4,972	5,231	5,043	4,836	5,062	5,186	2.4%
Pork /1	3,142	3,817	3,882	4,083	4,067	4,129	1.5%
Broiler and Turkey /2	4,536	4,513	4,789	4,604	4,908	5,076	3.4%
Total	12,650	13,561	13,714	13,523	14,037	14,391	2.5%
Exports							
Beef and Veal /1	5,672	6,275	6,340	6,498	6,952	7,138	2.7%
Pork /1	3,233	3,728	4,039	4,552	5,003	5,100	1.9%
Broiler and Turkey /2	6,109	6,275	6,540	6,564	7,640	8,159	6.8%
Total	15,014	16,278	16,919	17,614	19,595	20,397	4.1%
U.S. Exports							
Beef and Veal /1	1,029	1,110	1,142	209	285	290	1.8%
Pork /1	707	731	779	989	1,229	1,263	2.8%
Broiler and Turkey /2	2,741	2,379	2,451	2,371	2,726	2,810	3.1%
Total	4,477	4,220	4,372	3,569	4,240	4,363	2.9%
U.S. Market Share (%) of Exports Among Major Traders							
Beef and Veal /1	18%	18%	18%	3%	4%	4%	0%
Pork /1	22%	20%	19%	22%	25%	25%	0%
Broiler and Turkey /2	45%	38%	37%	36%	36%	34%	-1%
Combined	30%	26%	26%	20%	22%	21%	0%

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.

Livestock and Poultry: World Markets and Trade Overview

Key Developments and Factors Impacting Livestock and Meat Production, Supply and Distribution in 2006

- **Positive macroeconomic growth will continue to encourage investment and increase consumer demand.**

World economic growth is expected to remain strong throughout 2006, albeit at the same level of 2005. The forecasted positive economic environment will promote investment in meat production and processing capacity in many major livestock and poultry producing countries. Producers and processors in rising exporting countries are investing in a range of capacity and quality improvement projects such as the modernization and construction of slaughtering plants in Brazil and feedlot expansion in South Africa. However, there are instances in which economic growth will not be enough to support production and processing growth. In the case of the Indonesian poultry sector, outbreaks of AI, escalating energy costs, weak currency, and higher feed costs will minimize profits and constrain growth in 2006. Increases in worldwide real per capita GDP in 2006 will continue to fuel rising livestock and poultry consumption and hence production. Asian economies particularly China, Hong Kong, Taiwan, and Thailand are forecast to experience strong growth, likely fostering meat consumption as consumers will have more disposable income.

- **Red meat and poultry meat prices for major exporters influenced by disease related trade distortions.**

During 2004 and 2005, outbreaks of AI and BSE caused trade distortions which affected major exporters' (such as the United States and Brazil) poultry and beef prices. Consequently, major exporters' pork prices increased in the last two years as exports

mushroomed in the wake of consumers shifting their animal protein consumption.

- **Favorable exchange rate enables U.S. to remain price competitive.**

A weak U.S. dollar has made U.S. exports of meat and poultry more competitive in world markets since 2003. Even though further depreciation of the U.S. dollar vis à vis competitor countries such as Brazil and Australia is not anticipated to continue in 2006, favorable exchange rates will give U.S. exports a competitive advantage.

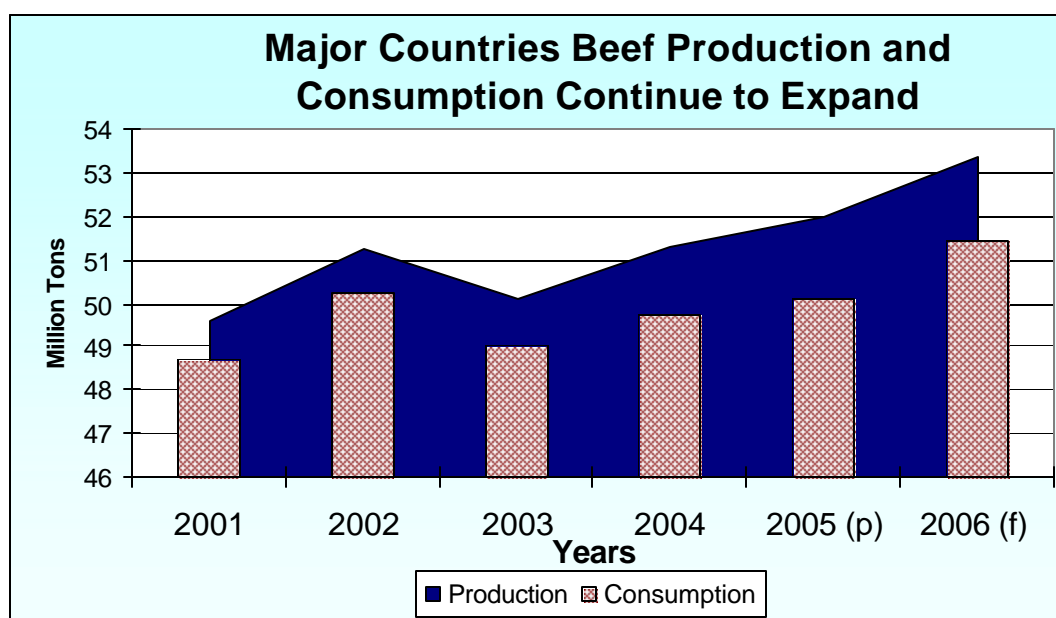
- **FMD in Brazil will have minimal impact on current meat trade flows.**

The October 2005 outbreak of FMD in Mato Grosso do Sul, Brazil will constrain growth in the Brazilian beef and pork sectors. Brazil will shift beef production to FMD-free states to meet export demand in 2006, particularly to Russia. Mato Grosso do Sul is not a major pork producing region and the impact on Brazilian pork exports is anticipated to be small. At the time these forecasts were generated, Mato Grosso do Sul was the only state with confirmed FMD cases.

- **Broiler meat exports to surpass beef exports by major traders.**

For the first time in history, broiler meat exports by major traders are forecast to reach 7.5 million tons. Poultry demand is expected to be strong due to the absence of the United States in major beef markets and constraints on growth in Brazilian beef exports. The 2006 increase of nearly 7 percent is the result of increased trade by a number of countries including Argentina, Brazil, China, Thailand, and the United States.

Production



Source: Production, Supply and Distribution Database, FAS

Beef

Production Reaches New High

For countries tracked by USDA, levels of beef production, consumption, imports and exports continue to follow their recent trend of annual historic highs. Production of beef by major producers in 2006 is forecast to increase about 3 percent above the 2005 level to 53.4 million tons largely due to growth in Brazil and China. Beef production in the European Union will continue its slow decline and Russia will also experience a drop in production. New Zealand production will expand to serve Asian export markets closed to the United States and Canada and still continue to serve the United States and Canadian markets. Dry conditions in Australia have reduced feed grain and fodder supplies which created downward pressure on inventories, constraining production growth.

EU Production Continues to Decline

The European Union became a net importer of beef in 2003 as EU beef consumption rebounded from a BSE-induced decline and production has decreased. Total beef production in the European Union will continue to decline in 2006, to 7.8 million tons, as increases in the beef herd in New Member States (NMS) have not offset EU total decreases in dairy herds.

The decoupling of payments under the reform to the EU Common Agricultural Policy (CAP) reduced cow numbers (and hence beef production) and caused an increase in prices. Further, the NMS are net beef exporters and dairy quotas under the accession agreement have forced the culling of dairy cattle. However, this increase in beef production in the NMS may be short lived as EU policies are likely to increase grain prices, and hence production costs in the NMS.

Brazil: Long Term Growth and Potential

Brazil's rise to dominate the world beef market is not a short-term phenomenon. Investments in the cattle and beef industry remain strong as Brazil maintains an export-orientated focus. In 2001, only 11 percent of Brazilian beef production was exported. In 2006, this share is forecast to climb to 21 percent to 1.8 million tons.

There is still room for production and export growth. For example, the majority of Brazil's cattle are traditional breeds, with a fraction being improved cross-breeds. However, this is changing as during the past five years, the use of artificial insemination in beef cattle has increased by over 50 percent. Despite improved genetics, Brazil produces predominantly lower-value grass-fed beef.

China Continues to Expand Beef Production

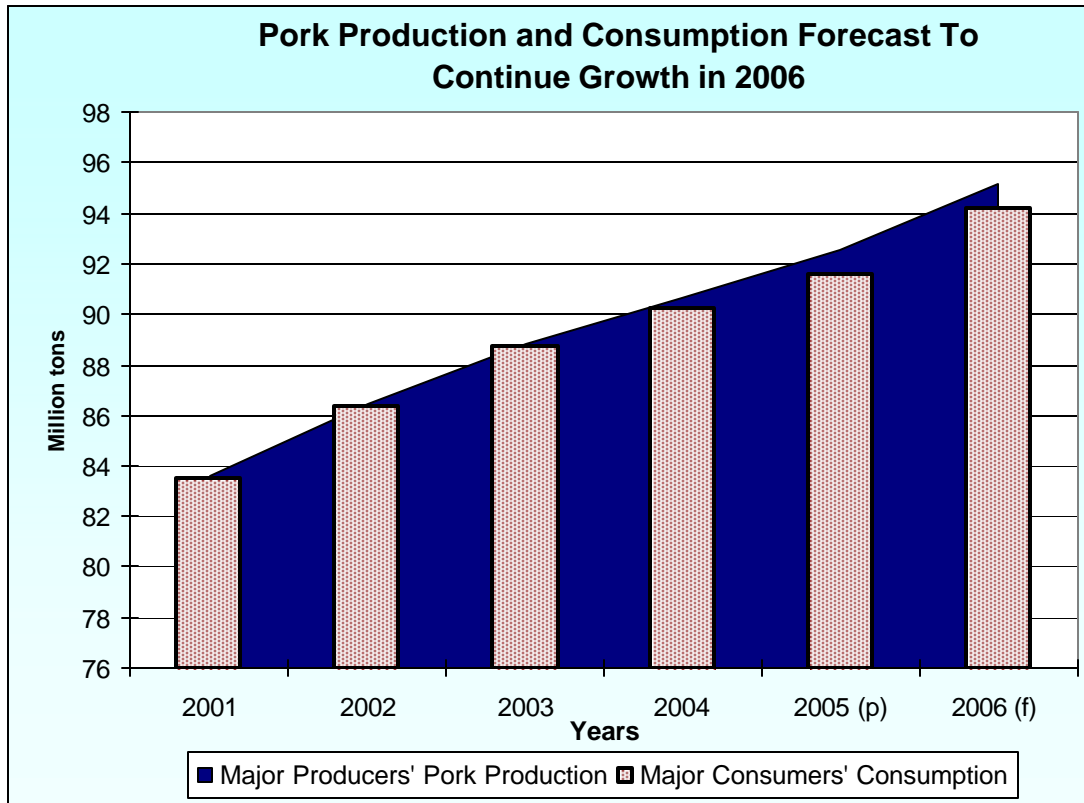
Chinese beef production will expand over 6 percent in 2006 to 7.6 million tons. The gap created as production is unable to keep pace with strong demand will drive up beef prices as well as the expansion of China's cattle and beef industry in 2006. Government efforts will assist in constraining the spread of FMD though animal disease surveillance and controls still needs further tightening. China faces significant challenges to expand its cattle sector as it lacks grass and forage resources, breeding stock, water and energy resources, and transportation facilities.

The United States and Canada: A Changing Relationship

On July 18, 2005 after the implementation of the USDA minimal risk region rule, the United States allowed certain live cattle imports from Canada for the first time in more than two years. However, despite attractive prices in the United States, Canadian live cattle exports to the United States have not resumed to the pre-BSE period average levels. Canadian exports of cattle, virtually all to the United States, are forecast at nearly 900,000 head in 2006, down 31 percent from the 2000 to 2002 average of 1.3 million head.

The relationship between the United States and Canada cattle and beef industries may have changed. As a result of being shut out of the United States market, the Canadian cattle industry is implementing a strategy to reposition itself to be less reliant on the United States processing industry while expanding domestic slaughter. In 2005, Canadian slaughter is expected to be nearly 20 percent, or about 800,000 head, above 2002 levels.

U.S. beef production is forecast to increase 4 percent in 2006 to 11.8 million tons. Larger cattle imports due to continued imports of under 30 month old cattle from Canada are expected to help boost slaughter numbers, relatively low-priced feed, and continued firm demand should encourage producers to feed cattle to heavier weights.



Source: Production, Supply and Distribution Database, FAS

Pork

Continued Strong Production in 2006

Accounting for 76 percent of the major producers' increase forecast in 2006, China will drive pork production for those countries 3 percent higher in 2006 to just over 95 million tons. China will continue to dominate as the world leader with nearly 51 million tons of pork production. Increases in pork production will occur in the European Union and Russia in 2006. Brazilian pork production will increase just over 3 percent to slightly more than 2.8 million tons in 2006 as the FMD-impacted region of Mato Grosso do Sul is not a major pork producing region.

Pork production continues to benefit from its role as a substitute for animal protein when trade in beef and poultry declines due to

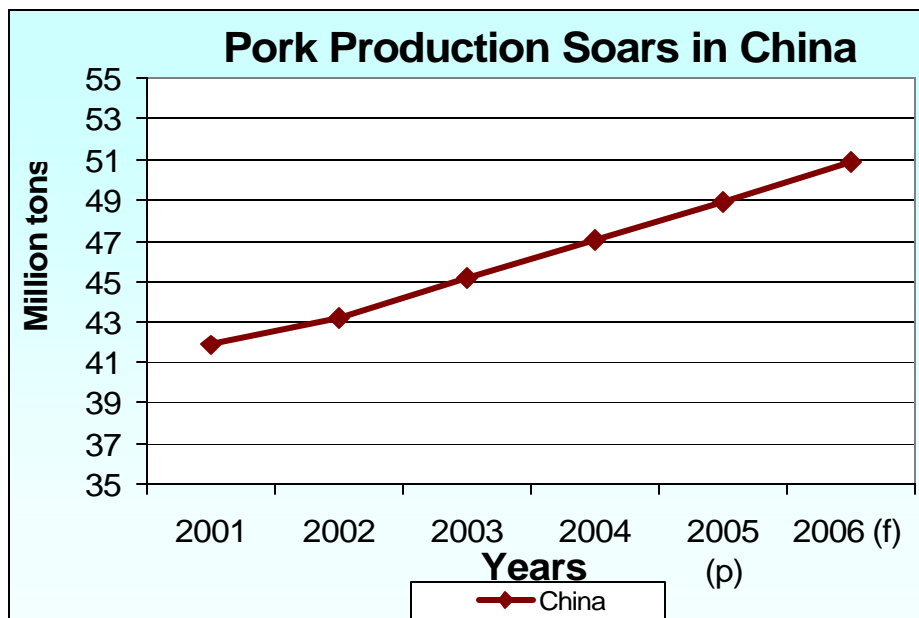
disease-related bans. Growth in pork production and consumption in some regions is due to substitution, while recent export growth in the other regions such as Mexico has been income driven.

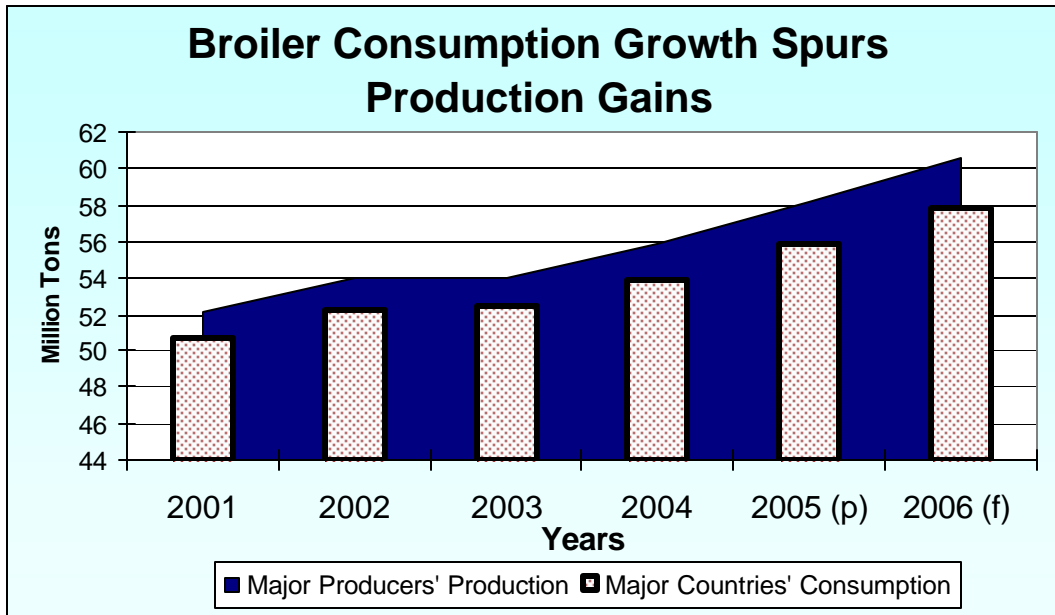
China: Despite various obstacles, China's swine production has benefited from efficiency gains due to improved breeds and feed. This is reflected by increased imports of breeding swine. Increasing percentages of sow stocks compared to total inventory will translate into continued strong swine production in 2005 and 2006. Investment in hog slaughter and pork processing has also risen. Increased foreign investment through joint ventures will continue to boost efficiency and production.

European Union: With inventories, increasing, the 2006 pig crop is expected to increase, especially in the New Member

States (NMS). In line with increased slaughter, pork production is forecast to rise approximately 1 percent in 2006 to nearly 21 million tons.

United States: The United States market is currently signaling producers to expand production. However, hog producers seem to be holding back. Production in recent years has been export driven. While only 8 percent of U.S. pork production was exported in 2001, 13 percent of U.S. pork production is forecast to be exported in both 2005 and 2006. In 2006, U.S. pork exports are forecast to reach a high of nearly 1.3 million tons.





Source: Production, Supply and Distribution Database, FAS

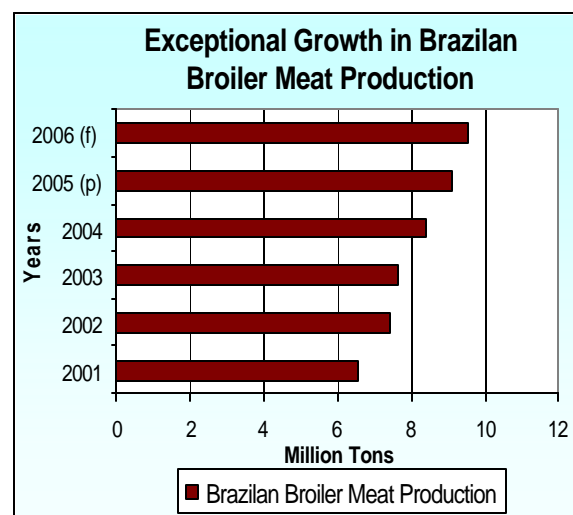
Poultry

Production Forecast to Grow Again in 2006

Poultry meat production by major producing countries is forecast to increase nearly 4 percent in 2006 to 65.6 million tons. With significant growth in Brazil, China, India, and the United States as well as a rebound in production in Asia, poultry production continues to expand worldwide. Despite higher oil and energy prices in 2006, moderate feed prices and continued integration and concentration will facilitate world poultry production.

United States: The United States accounts for the largest portion of the increase in broiler meat production forecast for 2006. Most of the increase in production will be consumed in the United States but exports are expected to benefit from increased production.

Brazil: Brazil also accounts for a large portion of the increase in world broiler meat production in 2006. Brazilian broiler meat production is expected to increase 5 percent to just over 9.5 million tons in 2006. This follows significant production increases in the past two years.



Source: Production, Supply and Distribution Database, FAS

The increase in broiler meat production continues to be driven by record exports as Brazil expands sales to various markets such as Japan due to AI-related bans on several of its competitors. From January to August 2005, Brazil increased its exports to Japan by 35 percent. In addition, domestic consumer demand and increased domestic soybean meal supply has supported broiler industry growth in Brazil.

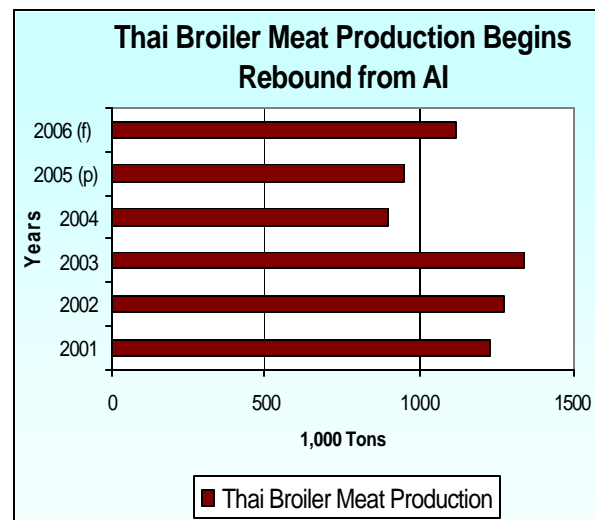
Mexico: Production of broiler meat is expected to increase 22 percent to just over 2.6 million tons between 2002 and 2006. Production has expanded faster than beef and pork production. Mexico's rapidly growing poultry industry is becoming increasingly concentrated, integrated, and modern. However, producers have been unable to keep pace with growing consumption. Mexican poultry consumption is climbing due to population growth, the affordability of poultry relative to other meats, effective marketing, increased usage in processed food products, and improved product quality. The result is an expected 42-percent increase in imports from 2002 to 2006.

European Union: While poultry production has mostly recovered from the 2003 AI outbreak in the Benelux and the 2003 nitrofurans scare in Portugal, producers and processors in the entire EU-25 are still adapting to the new market situation as a result of the 2004 EU enlargement. EU broiler production is expected to increase slightly in 2006 to reach nearly 7.7 million tons in 2006, while consumption is slowly increasing, particularly in the New Member States. The result is a growing import market which is anticipated to increase nearly 5 percent in 2006 to 460,000 tons.

Argentina: Production has skyrocketed in recent years, an expected 84 percent from 2002 to 2006, to nearly 1.2 million tons. The increase is a result of good profitability in the sector, very competitive broiler prices in the domestic market and the opening of new export markets.

Southeast Asia: The impact of AI on countries such as Indonesia and Thailand has been particularly difficult for small and medium sized producers who do not have the capital to withstand the economic shock such as animal loss through government ordered culling (with no or below-market compensation) and price declines following loss of export markets. Thailand lost an estimated 20 to 25 percent of its poultry inventory. Approximately 23 percent of Thai small and medium sized chicken producers are believed to have exited the industry following recent AI outbreaks.

In 2006, Thai broiler meat production is to increase to just over 1.1 million tons. However, this is still 16 percent below pre-AI levels of 2003. Indonesian broiler meat production is expected to reach 672,000 tons in 2006, which is still below 2003 production levels.



Source: Production, Supply and Distribution Database, FAS

Consumption

Global Trends and Factors in Consumption

Increases in disposable income undoubtedly augment food purchases in low and middle-income countries. Further, of these boosts in purchasing power, a higher proportion is spent on purchases of higher-value products such as meat and dairy. Thus, macro-economic stability and growth in low and some middle-income countries results in higher consumption of red meat and poultry, providing new growth-market opportunities for domestic producers and world suppliers.

Not only are low and middle-income countries increasing their per capita consumption, they are also gradually accounting for a greater share of world consumption. China's pork consumption accounted for only 50 percent of pork consumption in major pork consuming countries in 2001 and is forecast to account for 53 percent in 2006. Alternatively, the European Union's share of pork consumption is forecast to decrease from 24 percent to 22 percent from 2001 to 2006.

Red meat and poultry demand in developed countries such as the United States is strong. Given the already relatively high level of consumption, per capita consumption of these products cannot be expected to gain sharply. However, demand in higher income countries is shifting to more convenient and processed products, creating opportunities for value-added meat products.

Beef

Anticipating a healthy 6 percent increase in consumption in 2006 to 7.6 million tons, China accounts for a large portion of the projected growth in beef consumption by major consumers in 2006 due to the sheer

size of the market. Despite higher beef prices, an increase in western-style dining in China and greater disposable income supports growth. Percentage increases in consumption in 2006 are also significant in Egypt, Hong Kong, Korea and Uruguay.

Pork

Pork consumption in the major consuming countries is expected to grow about 3 percent in 2006 and again China accounts for the largest portion (76 percent) of forecasted growth. One of the few countries in which a decline in consumption is anticipated in 2006 is Japan. While the decline in Japanese pork consumption is minor, less than 2 percent, it demonstrates the market is readjusting. In 2004, mainly due to import bans on U.S. beef due to BSE and Asian poultry due to AI, Japan experienced unusually high levels of demand for pork. As Japan adjusts to supply shocks to the beef and poultry sectors, pork consumption is forecast to return to more historic levels.

Poultry

Unlike beef and pork, the forecast global increase in poultry consumption is not concentrated in one country. Broiler meat consumption in selected countries will continue to increase to slightly over 3 percent in 2006. Substantial increases in broiler meat consumption from 2005 to 2006 are forecasted for Brazil (4 percent) China (3 percent), India (16 percent) Mexico (5 percent), and Russia (7 percent). While the United States is anticipating a 3-percent increase in broiler meat consumption, it accounts for 21 percent of the increase among major consumers.

A number of counties with highly pathogenic avian influenza (HPAI) outbreaks have experienced drops in domestic consumption as consumers lack information about the nature of the disease and preventive measures. However as consumers respond to better information, they begin to return to prior consumption levels. For example:

Thailand: After a sharp drop in domestic consumption in 2003 and 2004, poultry consumption in 2005 is estimated to begin recovering. In addition, despite an upward trend in domestic poultry prices, Thai consumption is forecast to grow 7 percent to 760,000 tons in 2006 due to increasing consumer confidence in product safety and competitive prices compared to other meats.

Indonesia: Similar to Thailand, consumer confidence in poultry is returning after AI related human deaths in 2005 negatively impacted demand. Poultry consumption dropped about 20 percent after the announcement of human AI deaths in Indonesia in July 2005. However, sales at quick-serve chain outlets, which are primarily located in urban areas, reported normal sales during the AI outbreak. By August 2005, consumer confidence and purchases of poultry meat began to rise. As a result, the decline in Indonesian poultry consumption was only a very short-term reaction by consumers who quickly returned to normal patterns. Thus, the shock did not have a negative impact on annual Indonesian poultry consumption which will actually increase 2 percent in 2005.

Trade

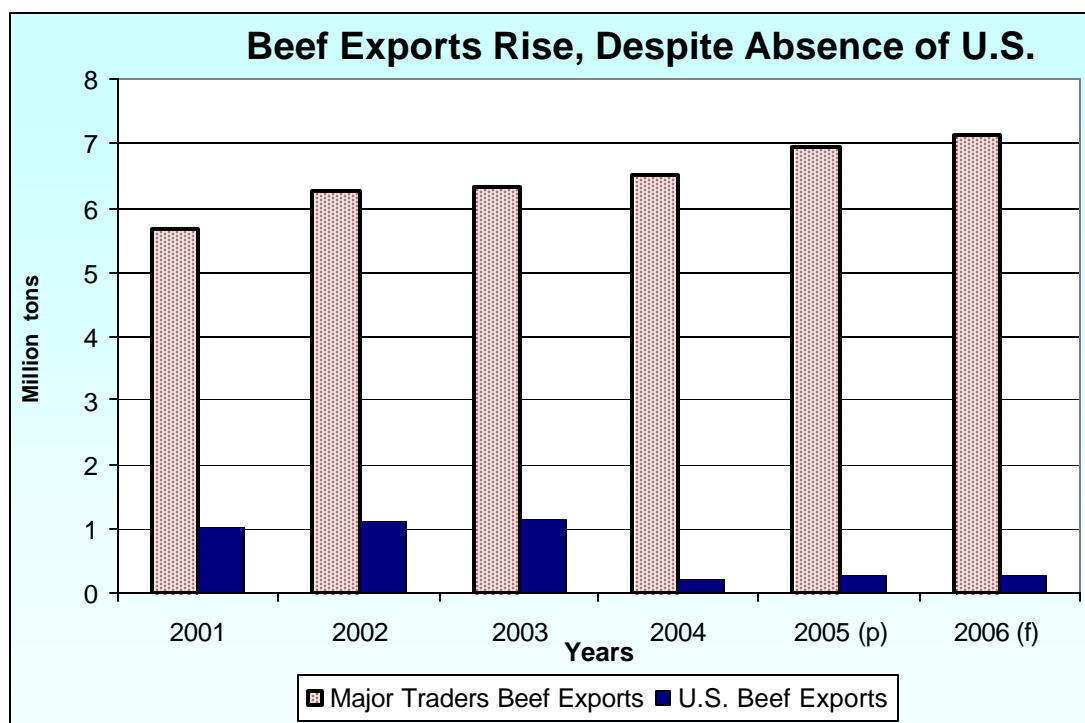
Disease Impacting Trade Flows

Disease outbreaks and their resulting trade restrictions have impacted traditional trading relationships. While this generated negative consequences for certain suppliers, it also created new market opportunities for rising producers. Brazil and Argentina only accounted for 16 percent of beef trade among major traders in 2001, but are forecast to account for 35 percent of that beef trade in 2006.

The absence of Canada and the United States from the world beef market has created opportunities for other suppliers. Australia and New Zealand have increased their market share in Asian markets such as Japan and Korea. However, other exporters such as India and Mexico have also gained.

Despite import bans in most of its major beef export markets, Canada's beef exports are projected to achieve record levels in 2005 and 2006 due to increased slaughter and strong demand in the U.S. beef market.

After AI-related import bans on Thailand and China limited poultry meat sales, Brazil assumed the position of Japan's leading supplier of broiler meat. Japanese import restrictions on beef from Canada and the United States as well as AI-related import restrictions on poultry and poultry products from various Asian countries have bolstered pork imports. The United States and other suppliers such as Canada and China have benefited from Japanese consumers' increased pork purchases.



Source: *Production, Supply and Distribution Database, FAS*

Beef

Overview

Beef imports for selected countries are forecast to rise nearly 2 percent to just over 5.2 million tons, a new historic high. Many markets are forecast to increase imports during 2006 including Japan (3 percent to 740,000 tons), Russia (7 percent to 730,000 tons), and the European Union (2 percent to 625,000 tons). U.S. beef imports will decline slightly (1 percent) to 1.7 million tons.

In addition to Argentina, China and India are anticipated to achieve significant export growth in 2006 at rates of 6 percent, 20 percent and 9 percent respectively. The international beef market is increasingly seeing the gains by exporters who are using favorable exchange rates, disease outbreaks and the ability to supply low-value beef to growing import demand markets. In 2004, Argentina exports greater quantities of beef than the European Union and is expected to ship 720,000 tons in 2006.

Brazil and FMD in Mato Grosso do Sul

The October 2005 outbreak of FMD in Brazil in Mato Grosso do Sul will constrain growth in the Brazilian beef sectors. Brazil is expected to shift beef slaughter to FMD-free states to meet export demand in 2006. As a result, Brazil's exports for 2006 are forecast at 1.8 million tons, the same volume projected for 2005. Despite no growth in exports due to FMD, Brazil will easily retain its position as the world's leading beef exporter.

Brazil recognizes the need to not just increase quantity but also quality of its beef products especially in specialty and niche markets. While Brazil is the world leader in beef exports by quantity, Australia is the

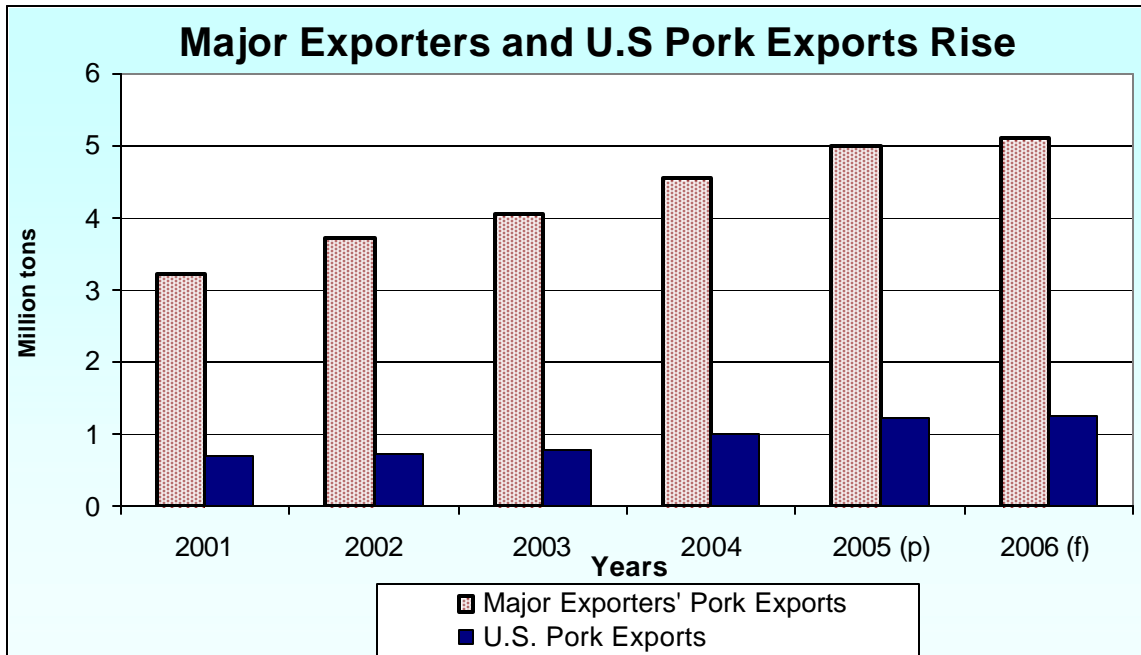
world's leader in beef exports by value as Australia sells beef in some premium markets. Only with Brazil achieving FMD-free status without vaccination will it be possible for exporters to access higher-value markets such as the United States.

Australia and New Zealand Attempt to Meet Demand

Australian beef production will essentially be stable in 2006 and New Zealand will increase production by 6 percent to 725,000 tons as larger numbers of cattle are expected to be slaughtered at heavier weights. Australia's export forecast projects a less than 1 percent growth in exports, whereas New Zealand is forecast to experience 7 percent growth in exports. Exports will account for 85 and 67 percent of New Zealand and Australian beef production respectively in 2006.

New Zealand beef is grass-fed. The Australian cattle industry has increased feedlot capacity to try to meet the Japanese preference for grain-fed beef. Australian feedlot capacity has now surpassed one million head and record levels of cattle on feed are projected in 2006.

Despite increasing beef supplies, Australia and New Zealand are only able to fill part of Japan's beef deficit in 2005 and 2006 due to their general inability to provide specific cuts (i.e. suitable for beef bowl or barbeque) and the quality of meat that has traditionally been supplied by the United States and Canada. Australia's practice of full-set based trade (boneless) with Japan may become a constraint for Japanese importers due to the development of a surplus in 2005 for some less popular cuts such as round. Total Japanese beef imports are forecast to increase nearly 3 percent to 740,000 tons in 2006.



Source: Production, Supply and Distribution Database, FAS

Pork

Overview

Pork exports continue to benefit from beef and poultry meat supply disruptions due to AI and BSE. Increases in pork production are substituting for reduced other animal protein demand in many countries.

The United States continues to benefit from strong demand and is expected to account for 25 percent of pork exports by major traders in 2006, up from 22 percent in 2001. U.S. pork exports have benefited from favorable exchange rates and the substitution of pork for beef in Asia. U.S. pork exports could reach a high of just over 1.25 million tons in 2006.

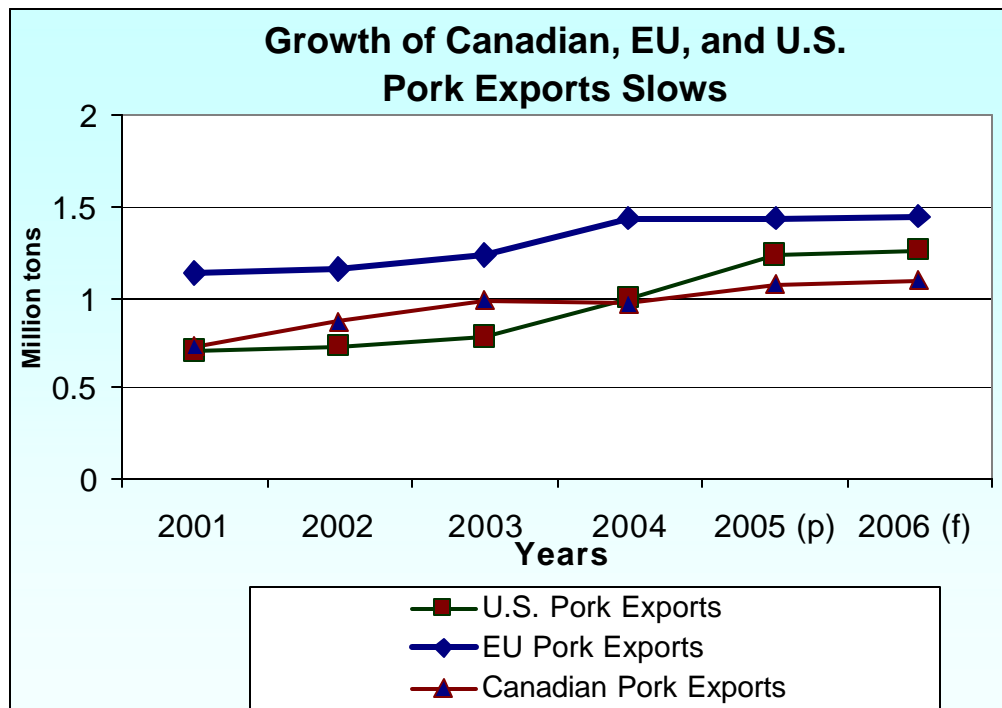
Between 2001 and 2006 increases in pork demand are expected to benefit Brazil, Canada and the European Union which have seen exports increase by 115 percent (to 725,000 tons), 51 percent (to 1.1 million

tons), 28 percent (to nearly 1.5 million tons) respectively. In 2006, for the second year in a row, Canadian pork exports are forecast to exceed 1 million tons.

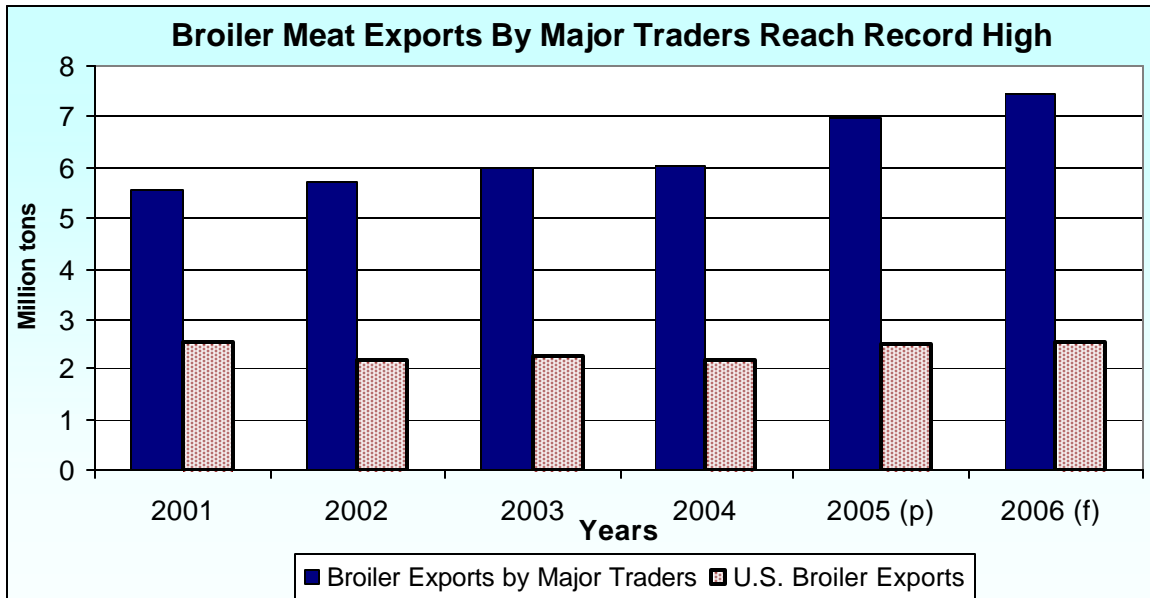
Brazil: With a favorable climate, a strong domestic feed supply and inexpensive resources, Brazil is well positioned to retain its status the world's third largest pork producer, though far behind leading countries.

Brazil is extremely dependent on Russia for export sales. From January to September 2005, Russia accounted for approximately 65 percent of Brazilian pork exports. Brazilian exports to other non-traditional markets are increasing through negotiations to resolve SPS issues and aggressive market promotion. The FMD outbreak in Mato Grosso do Sul is not expected to impact Brazilian pork exports as it is not a primary pork production or exporting region.

European Union: EU pork production is expected to marginally increase in 2006 while exports rise slightly (1 percent) in 2006 to nearly 1.5 million tons, as Polish exports to Russia are expected to resume after gaining Russian export approval. The European Union easily retains its position as the world's leading pork exporter and is forecast to account for 28 percent of pork exports by major traders and 25 percent of the increase in pork exports in 2006.



Source: *Production, Supply and Distribution Database, FAS*



Source: Production, Supply and Distribution Database, FAS

Poultry

Overview

The 2006 forecast marks the first year in which broiler exports by major traders is expected to achieve over 7.4 million tons, surpassing beef exports. The 2006 export increase of nearly 7 percent is the result of increased trade by a number of countries including Argentina, Brazil, China, Thailand and the United States.

United States: While the United States is expected to have a market share of just under 34 percent of the broiler meat exports by major traders in 2006, it is eroding. In 2001, the United States accounted for 45 percent of broiler meat trade among major traders. In 2006, U.S. broiler exports are expected to increase a modest 2 percent to just over 2.5 million tons.

Thailand: While Thai broiler exports have not fully rebounded to pre-AI levels, exports in 2006 are expected to be one-third above 2005 levels, reaching 400,000 tons. Due to

trade bans on fresh product, most Thai exporters are adjusting production by investing in processing facilities. Cooked chicken products are normally made-to-order meat products that are processed or prepared by heat (such as grilling, steaming, boiling, etc.).

Thailand's success has been attributed to its market value, in terms of quality and price, being superior to that of competitors such as China and Brazil. In Thailand's traditional markets such as Japan and the European Union, the processed products are achieving success. Further, these processed products have found some new markets in Africa and the Middle East.

Brazil: Brazilian broiler exports are forecast to increase a healthy 7 percent in 2006 to a new high of over 3 million tons. It is expected that in 2006 Brazil will be the world's leading broiler exporter by quantity for the third consecutive year.

The appreciation of the Brazilian Real and higher production costs may affect profit

margins and price competitiveness in 2006. However, export expansion will be supported by market promotions and sanitary agreements in new markets.

Unlike pork, Brazilian poultry exports are extremely diversified and not dependent on any particular market. Healthy increases in Brazilian broiler exports have also been across the board and not in any one particular market. While Brazilian poultry exports to Japan in the first nine months of 2005 nearly doubled from 2003, this growth is a function of Thailand's inability to ship fresh broiler meat to Japan. Brazilian sales in the Gulf region (Saudi Arabia, Kuwait and the United Arab Emirates) have also continued to grow and at a rate faster than the expansion of its sales to Europe.

Beef and Veal Summary Selected Countries

1,000 Metric Tons (Carcass Weight Equivalent)

	2001	2002	2003	2004	2005 (p)	2006 (f)
Production						
Brazil	6,895	7,240	7,385	7,975	8,355	8,560
European Union 1/	8,084	8,145	8,061	7,941	7,825	7,800
China, Peoples Republic of	5,488	5,846	6,305	6,759	7,180	7,640
Argentina	2,640	2,700	2,800	3,130	2,970	3,000
India 2/	1,770	1,810	1,960	2,130	2,230	2,300
Australia	2,049	2,089	2,073	2,114	2,181	2,210
Mexico	1,925	1,930	1,950	2,099	2,125	2,175
Canada	1,250	1,294	1,190	1,496	1,530	1,560
Russian Federation	1,760	1,740	1,670	1,590	1,525	1,465
New Zealand	609	589	693	720	685	725
Others 3/	5,193	5,431	3,969	4,078	4,052	4,129
Total Foreign	37,663	38,814	38,056	40,032	40,658	41,564
United States	11,983	12,427	12,039	11,261	11,320	11,812
Total	49,646	51,241	50,095	51,293	51,978	53,376
Consumption						
European Union 1/	7,658	8,187	8,315	8,225	8,190	8,205
China, Peoples Republic of	5,434	5,818	6,274	6,703	7,111	7,556
Brazil	6,191	6,437	6,273	6,400	6,600	6,800
Mexico	2,341	2,409	2,308	2,368	2,420	2,505
Argentina	2,514	2,362	2,426	2,512	2,294	2,284
Russian Federation	2,400	2,450	2,378	2,308	2,200	2,190
India 2/	1,400	1,393	1,521	1,631	1,610	1,625
Japan	1,419	1,319	1,366	1,180	1,221	1,231
Canada	969	990	1,065	1,055	1,047	1,057
Australia	653	696	786	754	750	750
Others 3/	5,378	5,467	3,965	3,954	3,946	4,029
Total Foreign	36,357	37,528	36,677	37,090	37,389	38,232
United States	12,351	12,737	12,340	12,667	12,746	13,227
Total	48,708	50,265	49,017	49,757	50,135	51,459

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

Note: 1/Data series represents EU-25. 2/Includes buffalo. 3/ From 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)

	2001	2002	2003	2004	2005 (p)	2006 (f)
Imports						
Japan	1,002	712	851	647	721	740
Russian Federation	648	719	720	730	680	730
European Union 1/	358	461	463	583	615	625
Mexico	426	489	370	287	320	360
Korea, South	246	430	444	218	235	250
Philippines	113	126	129	164	160	165
Egypt	136	162	93	114	120	140
Canada	300	308	274	111	135	130
Hong Kong	71	71	80	81	81	85
Taiwan	78	89	98	80	88	80
Others 3/	159	205	158	152	208	194
Total Foreign	3,537	3,772	3,680	3,167	3,363	3,499
United States	1,435	1,459	1,363	1,669	1,699	1,687
Total	4,972	5,231	5,043	4,836	5,062	5,186
Exports						
Brazil	748	881	1,175	1,628	1,800	1,800
Australia	1,399	1,366	1,264	1,394	1,470	1,480
Argentina	169	348	386	623	680	720
India 2/	370	417	439	499	620	675
Canada	575	610	384	559	615	640
New Zealand	496	486	558	606	575	615
Uruguay	145	262	325	410	460	470
European Union 1/	502	485	388	358	250	220
China, Peoples Republic of	60	44	43	61	75	90
Ukraine	98	181	202	108	85	90
Others 3/	81	85	34	43	37	48
Total Foreign	4,643	5,165	5,198	6,289	6,667	6,848
United States	1,029	1,110	1,142	209	285	290
Total	5,672	6,275	6,340	6,498	6,952	7,138

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

Note: 1/Data series represents EU-25. 2/Includes buffalo. 3/ From 2003, Colombia, Costa Rica, Dominican Republic, El Salvador, Honduras, Nicaragua and Venezuela are dropped from the database.

(p) preliminary; (f) forecast

Pork Summary Selected Countries

1,000 Metric Tons (Carcass Weight Equivalent)

	2001	2002	2003	2004	2005 (p)	2006 (f)
Production						
China, Peoples Republic of	41,845	43,266	45,186	47,016	48,900	50,900
European Union 1/	20,427	20,938	21,150	20,851	20,720	20,900
Brazil	2,230	2,565	2,560	2,600	2,730	2,825
Canada	1,731	1,854	1,882	1,936	1,960	1,975
Russian Federation	1,560	1,630	1,710	1,725	1,785	1,900
Japan	1,245	1,236	1,260	1,271	1,260	1,240
Mexico	1,065	1,085	1,100	1,150	1,175	1,200
Philippines	1,064	1,095	1,145	1,145	1,100	1,122
Korea, South	1,077	1,153	1,149	1,100	1,050	1,010
Taiwan	962	935	893	898	910	935
Others	1,681	1,765	1,775	1,674	1,545	1,569
Total Foreign	74,887	77,522	79,810	81,366	83,135	85,576
United States	8,691	8,929	9,056	9,312	9,402	9,591
Total	83,578	86,451	88,866	90,678	92,537	95,167
Consumption						
China, Peoples Republic of	41,829	43,238	45,098	46,725	48,570	50,535
European Union 1/	19,317	19,746	20,043	19,459	19,310	19,470
Russian Federation	2,076	2,453	2,420	2,337	2,434	2,574
Japan	2,268	2,377	2,373	2,561	2,531	2,485
Brazil	1,919	1,975	1,957	1,979	1,985	2,100
Mexico	1,298	1,349	1,423	1,556	1,615	1,640
Korea, South	1,158	1,199	1,294	1,331	1,328	1,351
Philippines	1,085	1,137	1,167	1,170	1,130	1,152
Canada	1,082	1,072	1,004	1,067	1,012	1,033
Taiwan	977	967	947	959	950	965
Others	2,061	2,189	2,270	2,276	2,121	2,139
Total Foreign	75,070	77,702	79,996	81,420	82,986	85,444
United States	8,389	8,685	8,816	8,817	8,619	8,763
Total	83,459	86,387	88,812	90,237	91,605	94,207

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

Notes: EU data includes 25 member states for all years.

(p) preliminary, **(f)** forecast

Pork Summary Selected Countries

1,000 Metric Tons (Carcass Weight Equivalent)

	2001	2002	2003	2004	2005 (p)	2006 (f)
Imports						
Japan	1,068	1,162	1,133	1,302	1,243	1,235
Russian Federation	528	834	725	629	650	675
Mexico	294	325	371	458	495	505
Korea, South	123	155	153	220	300	351
Hong Kong	260	275	302	332	250	270
Romania	63	106	133	179	185	180
Canada	91	91	91	105	135	155
Australia	38	55	67	77	90	95
Ukraine	2	2	10	52	75	60
China, Peoples Republic of	123	188	194	92	70	50
Others	121	138	165	138	127	118
Total Foreign	2,711	3,331	3,344	3,584	3,620	3,694
United States	431	486	538	499	447	435
Total	3,142	3,817	3,882	4,083	4,067	4,129
Exports						
European Union 1/	1,135	1,158	1,234	1,436	1,430	1,450
Canada	728	864	975	972	1,075	1,100
Brazil	337	590	603	621	745	725
China, Peoples Republic of	139	216	282	383	400	415
Mexico	61	61	48	52	55	65
Australia	67	78	74	59	55	58
Korea, South	42	16	17	10	5	10
Ukraine	2	1	12	8	6	10
Romania	0	0	0	5	2	3
Russian Federation	12	11	15	17	1	1
Others	3	2	0	0	0	0
Total Foreign	2,526	2,997	3,260	3,563	3,774	3,837
United States	707	731	779	989	1,229	1,263
Total	3,233	3,728	4,039	4,552	5,003	5,100

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

Notes: EU data includes 25 member states for all years.

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

Broiler Summary Selected Countries

1,000 Metric Tons (Ready to Cook Equivalent)

	2001	2002	2003	2004	2005 (p)	2006 (f)
Production						
China	9,278	9,558	9,898	9,998	10,200	10,500
Brazil	6,567	7,449	7,645	8,408	9,080	9,530
European Union 2/	7,883	7,788	7,439	7,656	7,670	7,690
Mexico	2,067	2,157	2,290	2,389	2,510	2,635
India	1,250	1,400	1,500	1,650	1,900	2,200
Argentina	870	640	750	910	1,080	1,180
Japan	1,074	1,107	1,127	1,124	1,130	1,125
Thailand	1,230	1,275	1,340	900	950	1,120
Canada	927	932	929	946	1,000	1,020
Malaysia	813	784	835	862	896	920
Others 1/	6,167	6,443	5,618	5,717	6,019	6,356
Total Foreign	38,126	39,533	39,371	40,560	42,435	44,276
United States	14,033	14,467	14,696	15,286	15,792	16,300
Total	52,159	54,000	54,067	55,846	58,227	60,576
Consumption						
China	9,237	9,556	9,963	9,931	10,150	10,440
European Union 2/	7,309	7,108	7,086	7,308	7,330	7,370
Brazil	5,341	5,873	5,742	5,992	6,240	6,490
Mexico	2,311	2,424	2,627	2,713	2,869	3,012
India	1,250	1,400	1,496	1,648	1,900	2,199
Russian Federation	1,588	1,697	1,680	1,619	1,799	1,930
Japan	1,797	1,830	1,841	1,713	1,820	1,810
Argentina	881	618	719	845	973	1,034
South Arica	786	830	928	959	997	1,026
Canada	924	925	933	972	984	995
Others 1/	7,643	7,803	6,918	7,190	7,438	7,726
Total Foreign	39,067	40,064	39,933	40,890	42,500	44,032
United States	11,558	12,270	12,540	13,080	13,363	13,769
Total	50,625	52,334	52,473	53,970	55,863	57,801

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

Note: 1/ From 2003 to 2005, Colombia and Egypt are dropped from the database.

2/ Data represents EU-25.

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

Broiler Summary Selected Countries

1,000 Metric Tons (Ready to Cook Equivalent)

	2001	2002	2003	2004	2005 (p)	2006 (f)
Imports 1/						
Russian Federation	1,281	1,208	1,081	960	1,040	1,075
Japan	710	744	695	582	695	680
EU-25	190	197	407	441	440	460
Saudi Arabia	399	391	452	429	436	447
Mexico	245	267	338	326	360	378
China	448	436	453	174	250	300
Hong Kong	183	164	154	244	230	246
South Africa	64	80	125	154	175	190
United Arab Emirates	125	133	154	158	160	160
Kuwait	63	57	81	119	130	138
Others 2/	394	414	441	657	580	564
Total Foreign	4,096	4,085	4,375	4,232	4,479	4,622
United States	6	6	6	12	17	16
Total	4,102	4,091	4,381	4,244	4,496	4,638
Exports 1/						
Brazil	1,226	1,577	1,903	2,416	2,840	3,040
European Union 3/	764	877	760	789	780	780
Thailand	392	427	485	200	300	400
China	489	438	388	241	300	360
Argentina	13	23	39	66	110	150
Canada	69	84	76	74	100	105
Kuwait	0	1	3	4	20	26
United Arab Emirates	20	37	40	15	20	20
Australia	19	15	15	13	14	14
Saudi Arabia	20	20	20	10	10	10
Others 2/	33	28	33	21	18	23
Total Foreign	3,045	3,527	3,762	3,849	4,512	4,928
United States	2,520	2,180	2,232	2,170	2,464	2,538
Total	5,565	5,707	5,994	6,019	6,979	7,466

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

Note: 1/ Chicken feet (paws) are not included in trade data.

2/ From 2003 to 2005, Colombia and Egypt are dropped from the database.

3/ Data represents EU-25.

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

Turkey Summary Selected Countries

1,000 Metric Tons (Ready to Cook Equivalent)

	2001	2001	2003	2004	2005 (p)	2006 (f)
Production						
European Union 2/	2,098	2,102	2,025	2,038	2,030	2,035
Brazil	165	182	200	240	280	310
Canada	149	147	148	145	155	156
Russian Federation	7	9	12	15	17	18
Mexico	13	13	14	13	13	13
South Africa	4	3	4	5	5	5
Taiwan	5	5	4	4	4	4
Others 1/	3	0	0	0	0	0
Total Foreign	2,444	2,461	2,407	2,460	2,504	2,541
United States	2,490	2,557	2,529	2,441	2,461	2,487
Total	4,934	5,018	4,936	4,901	4,965	5,028
Consumption						
European Union 2/	1,931	1,910	1,912	1,931	1,925	1,940
Mexico	157	153	171	156	182	191
Canada	135	142	136	141	145	147
Brazil	96	92	88	104	110	120
Russian Federation	171	174	126	92	98	104
South Africa	19	16	32	33	29	30
Taiwan	13	16	20	21	22	23
Others 1/	36	16	0	0	0	0
Total Foreign	2,558	2,519	2,485	2,478	2,511	2,555
United States	2,269	2,316	2,301	2,272	2,221	2,194
Total	4,827	4,835	4,786	4,750	4,732	4,749

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

Note: 1/ From 2003 to 2005, Hong Kong, Korea, Malaysia, and Taiwan are dropped from the database.

2/ Data represents EU-25.

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

Turkey Summary Selected Countries

1,000 Metric Tons (Ready to Cook Equivalent)

	2001	2001	2003	2004	2005 (p)	2006 (f)
Imports						
Mexico	152	147	158	144	170	179
European Union 2/	64	64	85	84	105	115
Russian Federation	164	165	114	77	81	86
South Africa	15	13	28	28	24	25
Taiwan	8	11	16	17	18	19
Canada	5	6	6	8	10	12
Others 1/	26	16	0	0	0	0
Total Foreign	434	422	407	358	408	436
United States	0	0	1	2	4	2
Total	434	422	408	360	412	438
Exports						
European Union 2/	231	256	198	191	210	210
Brazil	69	90	112	136	170	190
Canada	14	16	16	16	18	20
Mexico	8	7	1	1	1	1
Others 1/	1	0	0	0	0	0
Total Foreign	323	369	327	344	399	421
United States	221	199	219	201	262	272
Total	544	568	546	545	661	693

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

Note: 1/ From 2003 to 2005, Hong Kong, Korea, Malaysia, and Taiwan are dropped from the database.

2/ Data represents EU-25.

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

Notes to Readers

The *Livestock and Poultry: World Markets and Trade* circular is designed to give a snapshot 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 provide an overview of the situation. In addition, an explanation of significant changes in production, supply, and demand (PSD) is provided for major meat importing and exporting countries.

Assumptions

BSE: Due to uncertainties as to the length of the bans on trade in ruminants and ruminant products because of the discovery of bovine spongiform encephalopathy (BSE) in the United States and Canada, forecasts for 2005 and 2006 assume a continuation of policies currently in place among U.S. and Canadian trading partners as of October 31, 2005.

AI: Forecasts of 2005 and 2006 poultry trade reflect policies currently in place as a result of outbreaks of avian influenza (AI) as of October 31, 2005. Subsequent forecasts will reflect any announced changes.

FMD: Forecasts of 2005 and 2006 reflect the status of the foot and mouth disease (FMD) situation in Brazil as of October 31, 2005. As of this date, an outbreak was confirmed only in Mato Grosso do Sul. Subsequent forecasts will reflect any announced changes.

Data Modifications

China: Pork meat import data for 1997 to 2004 was modified to reflect new conversion methodology.

European Union: The PSD data series for the European Union (EU) was modified in November 2004 to account for 10 new members. The European Union-15 (EU-15) data series was discontinued. All data and references in the text that refer to the “European Union” or “EU” imply all 25 member states (EU-25) unless it is specified as “EU-15” and “New Member States” (NMS). For additional details, please refer to [Notes on European Union Data \(http://www.fas.usda.gov/dlp/circular/2004/04-10LP/EUDataNotes.html\)](http://www.fas.usda.gov/dlp/circular/2004/04-10LP/EUDataNotes.html) and [European Union Consolidated PSD Tables \(http://www.fas.usda.gov/dlp/circular/2004/04-10LP/EUDatatables.pdf\)](http://www.fas.usda.gov/dlp/circular/2004/04-10LP/EUDatatables.pdf) from the October 2004 edition of *Livestock and Poultry: World Markets and Trade*.

Mexico: Cattle inventories for 1997 to 2004 now reflect Government of Mexico statistics.

Romania: Pork meat import data for 2000 to 2004 was modified to reflect new conversion methodology.

Russia: Pork meat import and export data for 1999 to 2004 was modified to reflect new conversion methodology as well as the availability of official statistics.

India: Cattle imports for 1999, 2002 to 2006 were modified to reflect official Government of India statistics.

Technical Notes

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.

Totals

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. Nevertheless, by capturing the PSDs for all major meat importers and exporters, it is possible to forecast world trends, which are reflected in the text.

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* and *Trade at a Glance*.

FAS Reports from Overseas Offices

The *Livestock and Poultry: World Markets and Trade* circular is based on post reports submitted since August 2005 and on available secondary information. The individual country reports can be obtained on FASOnline at: <http://www.fas.usda.gov/scripts/attacherep/default.asp>.

Scheduled reports were received from the following countries:

Country Name	Report Number	Cattle	Beef	Swine	Pork	Report Number	Broiler	Turkey
Argentina	AR5027	x	x			AR5024	x	
Australia	AS5027	x	x	x	x	AS5028	x	
Bulgaria	BU5012	x	x	x	x			
Brazil	BR5622	x	x	x	x	BR5620	x	x
Canada	CA5056	x	x	x	x	CA5059	x	x
China	CH5063	x	x	x	x	CH5064	x	
Chile	CI5016			x	x			
Egypt	EG5016	x	x					
European Union	E35141	x	x	x	x	ES5142	x	x
Guatemala						GT5014	x	
Hong Kong	HK5026		x		x	HK5027	x	
India	IN5096		x			IN5093	x	
Indonesia						ID5018	x	
Japan	JA5053	x	x	x	x	JA5048	x	
Korea	KS5045	x	x	x	x	KS5044	x	
Kuwait						KU5003	x	
Malaysia						MY5036	x	
Mexico	MX5077	x	x	x	x	MX5059	x	x
New Zealand	NZ5012	x	x					
Philippines	RP5034	x	x	x	x	RP5033	x	
Romania	RO5011	x	x	x	x	RO5010	x	
Russian Federation	RS5062	x	x	x	x	RS5066	x	x
Saudi Arabia						SA5014	x	
South Africa	SF5030	x	x			SF5032	x	x
Taiwan	TW5028		x	x	x	TW5026	x	
Thailand						TH5092	x	
Turkey	TU5034	x	x					
Ukraine	UP5016	x	x	x	x	UP5015	x	
United Arab Emirates						TC5017	x	
Uruguay	UY5004	x	x					
Venezuela						VE5016	x	
Vietnam	VM5056			x	x			

Voluntary reports were also received for Turkey (Poultry – TU5024) and Costa Rica (Livestock – CS5014).

Detailed data for both listed and non-listed countries as well as customized data queries can be found on FASOnline at <http://www.fas.usda.gov/psd>.

Additional USDA Resources

Situation and outlook information on the U.S. livestock and poultry industry can be obtained from the USDA-Economic Research Service at:

<http://www.ers.usda.gov/Publications/LDP/>.

U.S. Department of Agriculture, Foreign Agricultural Service
Dairy, Livestock and Poultry Division
 1400 Independence Ave. S.W., Stop 1044, Washington, D.C. 20250-1044
 TEL: (202) 720-8031 FAX: (202) 720-0617
 Howard Wetzel, Director
 Vicky Gardner, Administrative Assistant

Analysis

Deputy Director for Analysis
 Todd Drennan(202) 720-1350
 Head, Dairy, Livestock, and Poultry Group
 Wendell Dennis(202) 720-1319
 Administrative Assistant
 LaToya Cooper.....(202) 720-7217
Beef
 Mayra Caldera(202) 720-2208
Cattle
 Mayra Caldera(202) 720-2208
Pork
 Stephen Wixom.....(202) 720-4185
Swine
 Stephen Wixom.....(202) 720-4185
Variety Meats
 Barbara Wojcik-Betancourt.....(202) 720-7571
Poultry Products
 Arnella Trent(202) 720-7285
Other Live Animals (horses, sheep, goat, etc.)
 Claire Mezoughem.....(202) 720-7715
Other Meats (horse, lamb, goat, etc.)
 Barbara Wojcik-Betancourt.....(202) 720-7571
Rendered Products
 Claire Mezoughem.....(202) 720-7715
Hides, Skins, and Leather
 Claire Mezoughem.....(202) 720-7715
Dairy Products
 Paul Kiendl.....(202) 720-8870
Breeding Cattle, Embryos, Semen
 VACANT
Mohair and Wool
 VACANT

Marketing

Deputy Director for Marketing
 Steve Shnitzler.....(202) 720-1353
 Head, Marketing Group
 Barbara Wolff.....(202) 720-4456
 Administrative Assistant
 Nicole Parran-Harrell(202) 720-7198
 Susan Cottrell.....(202) 720-1284
 Tosha Clark.....(202) 720-7066
 Susan Cottrell.....(202) 720-1284
 Tosha Clark.....(202) 720-7066
 Susan Cottrell.....(202) 720-1284
 Marsha Sheehan(202) 720-1352
 Tosha Clark.....(202) 720-7066
 Susan Cottrell.....(202) 720-1284
 Marsha Sheehan(202) 720-1352
 VACANT
 Marsha Sheehan(202) 720-1352
 Tosha Clark.....(202) 720-7066
 Tosha Clark.....(202) 720-7066

Sanitary Issues

Hugh Maginnis, Head, Sanitary Trade Issues Group(202) 720-2461

Anne Dawson(202) 720-7264	David Egelhofer(202) 690-1669
Mary Fleming(202) 720-4456	Michael Francom(202) 720-1252

Special Areas

Dairy Export Incentive Program Management Analyst	Paul Kiendl.....(202) 720-8870 Elaine Protzman.....(202) 720-5588
--	--

The United States Department of Agriculture (USDA) prohibits discrimination in all its programs and activities on the basis of race, color, national origin, sex, religion, age, disability, political beliefs, sexual orientation, and marital or family status. (Not all prohibited bases apply to all programs.) Persons with disabilities who require alternative means for communication of program information (Braille, large print, audiotape, etc.) should contact USDA's TARGET Center at 202-720-2600 (voice and TDD). To file a complaint of discrimination, write USDA, Director, Office of Civil Rights, Room 326-W, Whitten Building, 14th and