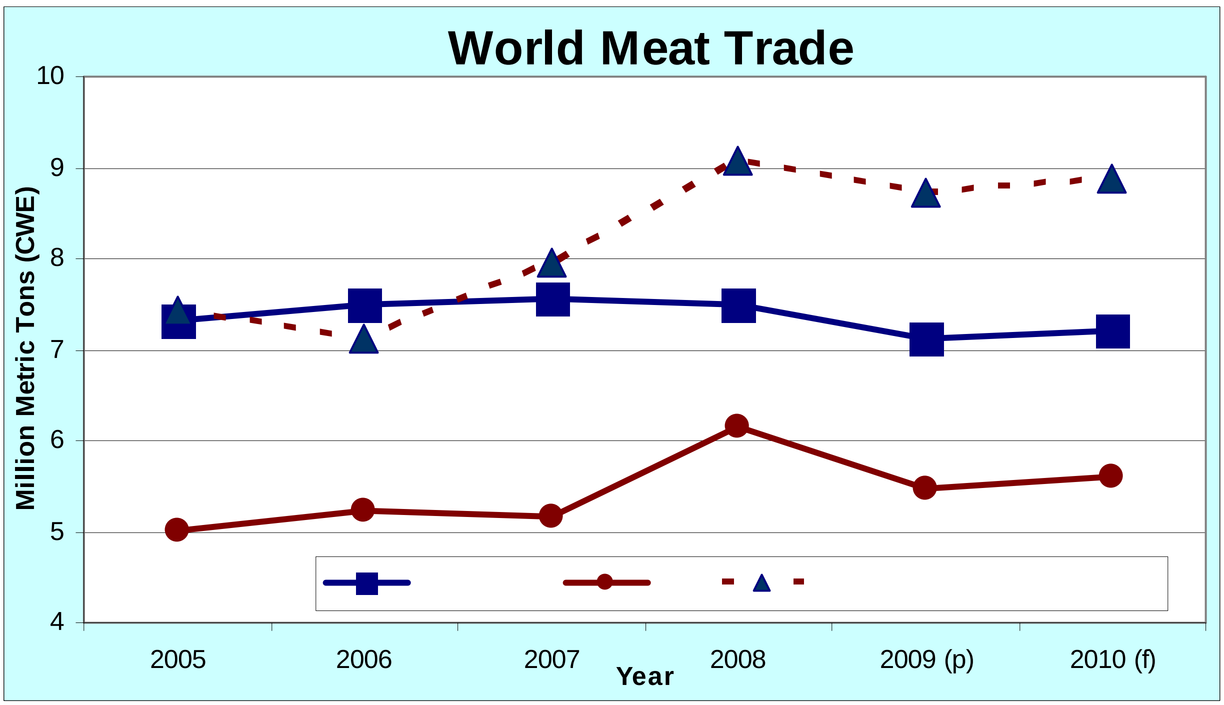
United States Department of Agriculture

Foreign Agricultural Service

October 2009

Livestock and Poultry: World Markets and Trade

2010 Forecast:
Economic Recovery Bolsters World Meat Trade



Economic recovery in 2010 will help stimulate improved demand for meat and poultry.

Beef and pork exports are forecast up 1 and 3 percent, respectively. Whereas improved demand for beef is expected worldwide, the boost in pork will generally be concentrated in North America. Brazil, the only key beef producer with excess supplies, is expected as the principal beneficiary of increased demand. However, both Brazil and the United States will be able to take advantage of the rise in pork.

Broiler and turkey meat exports are forecast 2 and 4 percent higher, respectively. Brazil will be the primary supplier as it focuses on growth to non-traditional markets. The United States faces a decline in broiler shipments on weak demand in major markets but modest growth is expected for turkey.

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

Approved by the World Agricultural Outlook Board/USDA

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

	2005	2006	2007	2008	2009	2010	Percent Change 2009 to 2010
Production							
Beef and Veal /1	56,283	57,536	58,359	58,050	56,782	56,405	-0.7%
Pork /1	94,420	96,075	94,585	98,528	100,236	101,883	1.6%
Broiler and Turkey /2	68,059	69,257	73,403	76,741	76,777	78,894	2.8%
Total	218,762	222,868	226,347	233,319	233,795	237,182	1.4%
Consumption							
Beef and Veal /1	55,832	56,804	57,947	57,450	56,116	55,972	-0.3%
Pork /1	94,048	95,842	94,434	98,357	100,022	101,867	1.8%
Broiler & Turkey /2	67,355	69,065	73,095	75,805	76,113	78,202	2.7%
Total	217,235	221,711	225,476	231,612	232,251	236,041	1.6%
Imports							
Beef and Veal /1	6,793	6,836	7,227	6,928	6,439	6,657	3.4%
Pork /1	4,740	4,921	5,087	5,915	5,323	5,412	1.7%
Broiler and Turkey /2	6,723	6,870	7,591	8,290	7,973	8,143	2.1%
Total	18,256	18,627	19,905	21,133	19,735	20,212	2.4%
Exports							
Beef and Veal /1	7,315	7,503	7,571	7,490	7,110	7,206	1.4%
Pork /1	5,006	5,224	5,162	6,147	5,465	5,608	2.6%
Broiler and Turkey /2	7,435	7,122	7,965	9,074	8,715	8,890	2.0%
Total	19,756	19,849	20,698	22,711	21,290	21,704	1.9%
U.S. Exports							
Beef and Veal /1	316	519	650	856	785	837	6.6%
Pork /1	1,209	1,359	1,425	2,117	1,887	2,018	6.9%
Broiler and Turkey /2	2,618	2,609	2,926	3,464	3,232	3,105	-3.9%
Total	4,143	4,487	5,001	6,437	5,904	5,960	0.9%
U.S. Market Share (%) of Exports Among Major Traders							**Change in Market Share Points**
Beef and Veal /1	4%	7%	9%	11%	11%	12%	1%
Pork /1	24%	26%	28%	34%	35%	36%	1%
Broiler and Turkey /2	35%	37%	37%	38%	37%	35%	-2%
Combined	21%	23%	24%	28%	28%	27%	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)

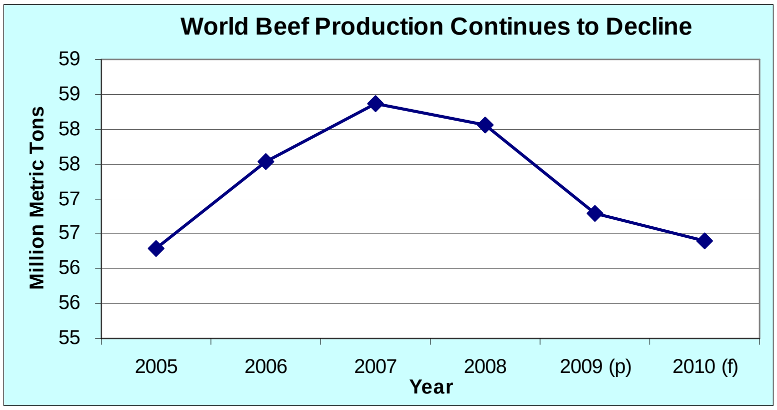
2/ 1,000 Metric Tons (Ready to Cook Equivalent)

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.

Beef: 2010 Forecast Overview

- **World beef and veal production down slightly to 56.4 million tons**

Beef production in 2010 is forecast to continue its recent decline, albeit at a slower rate of less than one percent. Production increases in Brazil (4 percent) and India (5 percent) will not offset less production in Argentina (13 percent), China (4 percent) and the United States (2 percent).



Argentina: Production is forecast to tumble 13 percent to 2.8 million tons on tighter cattle inventories. Argentina is expected to begin 2010 with a herd of 50.2 million head, 10 percent lower than just two years ago. Drought, persisting in most of the country since mid-2007, has been the primary driver of herd reduction generating lower calf crops on diminished pregnancy rates and depressed returns have forced producers to market more cattle than usual. Thus liquidation in 2008 and 2009 will come to fruition in 2010 as fewer weaned calves, a smaller herd and a reduction of cows for slaughter will limit supplies. Export restrictions, domestic policies capping beef prices, and reduced profit margins will also stifle investment and production.

China: Continuing contraction of the cattle herd is forecast to negatively impact beef production which will fall to just over 5.5 million tons – comparable to the levels of 2003/2004. The herd, estimated at 104.9 million head at the beginning of 2010, will have contracted for 2 years. Backyard producers, which account for the majority of holdings, have been discouraged by a marketing system disadvantageous to small producers. Despite high cattle prices, production costs have risen at a faster rate, squeezing profit margins. Uncertainty in the sector, which stifles production, has also been fostered by continued outbreaks of foot and mouth disease (FMD).

United States: Production is forecast to decline nearly 2 percent to 11.6 million tons on tighter supplies as the cattle herd has been contracting since 2007.

Brazil: Production is forecast to rise 4 percent to 9.3 million tons. Unlike other major producers, the herd continues to expand and is forecast to reach 185.2 million head by 2010. Increased availability of slaughter cattle will not only enable packers to meet strong demand for exports, which accounts for the bulk of the increase, but also satisfy solid domestic demand.

India: With the world's largest bovine herd, beef and buffalo meat production is forecast to rise 5 percent, primarily driven by strong domestic demand. Buffalo meat is cost competitive compared to other meat products and is widely accepted among Indian consumers. Firm demand for exports will also bolster production.

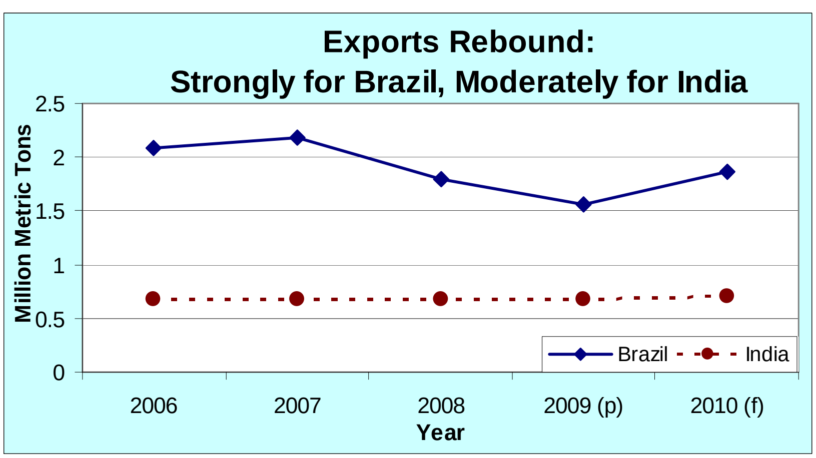
Beef and Veal Imports by Region (1,000 tons - CWE)

Caribbean	18	18	18	0	0%
Central America	45	44	44	0	0%
East Asia	1,181	1,237	1,263	26	2%
European Union	465	470	490	20	4%
Former Soviet Union - 12	1,212	759	838	79	10%
Middle East	604	583	598	15	3%
North Africa	305	260	300	40	15%
North America	1,789	1,824	1,929	105	6%
Oceania	20	18	18	0	0%
Other Europe	67	54	54	0	0%
South America	490	434	297	-137	-32%
South Asia	6	6	6	0	0%
Southeast Asia	532	529	591	62	12%
Sub-Saharan Africa	194	203	211	8	4%

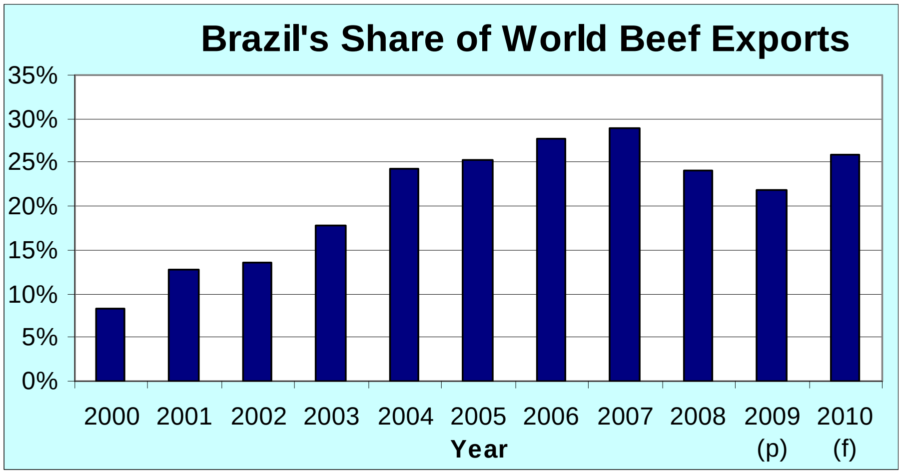
Note: Regions include a limited set of major trading countries.

- **Exports: Recovery in 2010 elusive**

World trade is forecast to rise a mere 1 percent as global demand fails to fully rebound and major suppliers struggle to generate adequate supplies. Australian and New Zealand exports are forecast to fall 3 and 2 percent respectively as they will be limited by production declines. Brazil is forecast to rise a stunning 20 percent – a trend that will not apply to its South American counterparts.



Brazil: Although the cattle sector is facing challenges due to industry restructuring and two years of reduced exports, the outlook for 2010 is extremely positive with exports rising to nearly 1.9 million tons. While still below the historical high of 2007, the increase will reinforce Brazil's position as the world's largest beef exporter and restore global market share. It is expected that global economic recovery could generate opportunities in the Middle East, recovery of shipments to the EU will continue, limited competing South American supplies will spur shipments to Russia, and the Columbia-Venezuela dispute will open avenues into Venezuela.

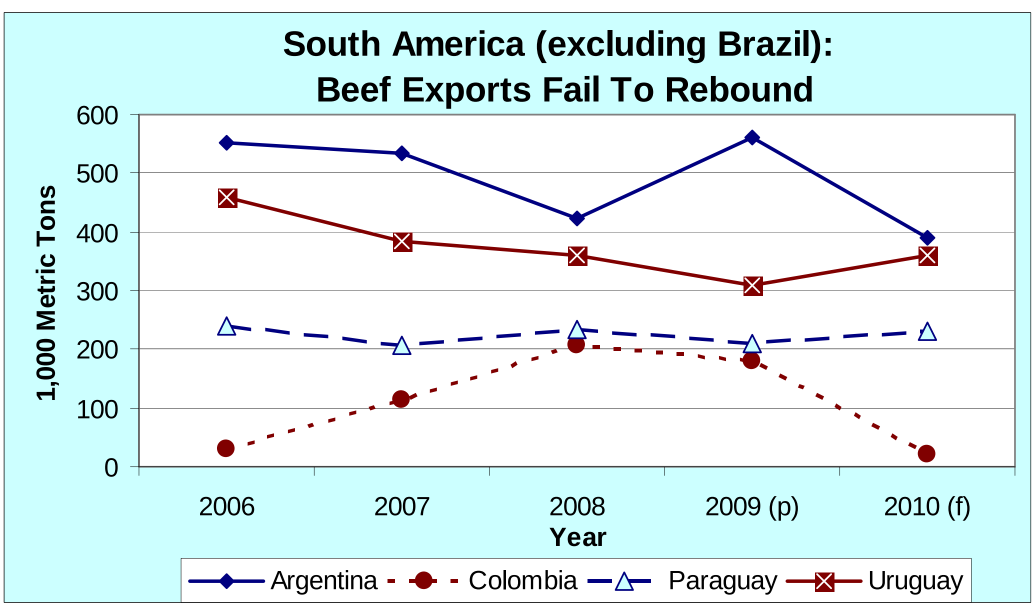


India: Exports are forecast to rise 4 percent to a historic 700,000 tons. Global demand for Indian buffalo meat is gradually growing due to its cost competitiveness, leanness, and perceived organic nature. However sales will remain limited to non-traditional, albeit growth, markets.

United States: Exports are forecast to rise 7 percent to 837,000 tons – a level still below that of 2008 and pre-BSE. Economic recovery in Canada and Mexico, the principal markets, are expected to drive the growth as well as greater Chinese demand.

Argentina: Plummeting production is forecast to reduce exportable supplies in 2010. The principal products and destinations will be high-value chilled cuts to the EU (Hilton Quota), thermoprocessed products to the EU, chilled cuts to Chile and frozen cuts to Russia, Venezuela and Israel. Exports of thermoprocessed product to the United States are expected to remain stable or slightly diminish.

Columbia: Exports are forecast to decline nearly 90 percent from 180,000 tons in 2009 to a mere 20,000 tons in 2010. Trade is dependent on the Venezuelan market and the current trade disruption will result in increased production remaining in-country for domestic consumption.



- **Imports: Lackluster as demand is slow to rebound from recession**

Global economic recovery will somewhat renew demand in 2010 and there will be few countries with noteworthy forecasts.

Russia: In the absence of a multilateral agreement on 2010 TRQs, the forecast is based on 2009 TRQ levels and allocations. As production declines persist and the economy rebounds, imports are expected to continue to fulfill demand. Imports are forecast to rise 11 percent to 780,000 remaining well below the 2008 peak.

United States: The world's largest beef importer is forecast to increase by 4 percent to 1.3 million tons bolstered by reduced U.S. production, a strong dollar, and robust demand for lean trimmings.

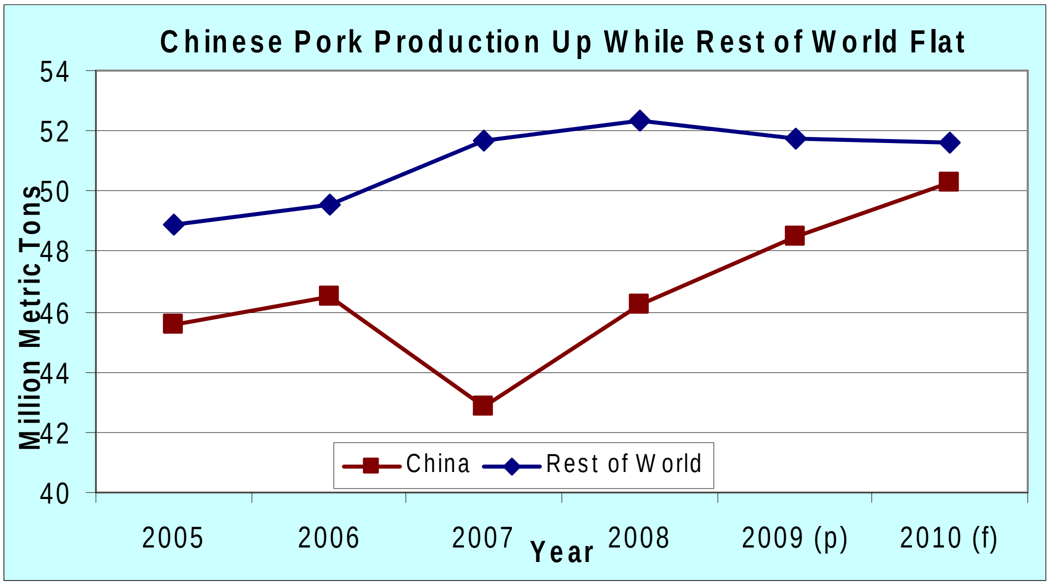
EU: Imports are forecast upward by 4 percent to 490,000 tons. Although lower production is expected to boost imports, it will be moderately constrained by stagnant demand as other proteins, particularly poultry, continue to make consumption gains.

Venezuela: Imports will plunge 60 percent to 100,000 tons despite growing demand as imports will be limited by its disruption with Columbia. With other South American producers failing to raise substantial supplies, Brazil is likely to be the key supplier.

Pork: 2010 Forecast Overview

- **Global Pork production forecast up 2 percent to 101.9 million tons**

China is the driving force behind global production growth in 2010. Excluding China, production is fractionally lower, as contraction in the United States, Canada, and the EU slightly offsets gains in Brazil, Russia, and the Ukraine.



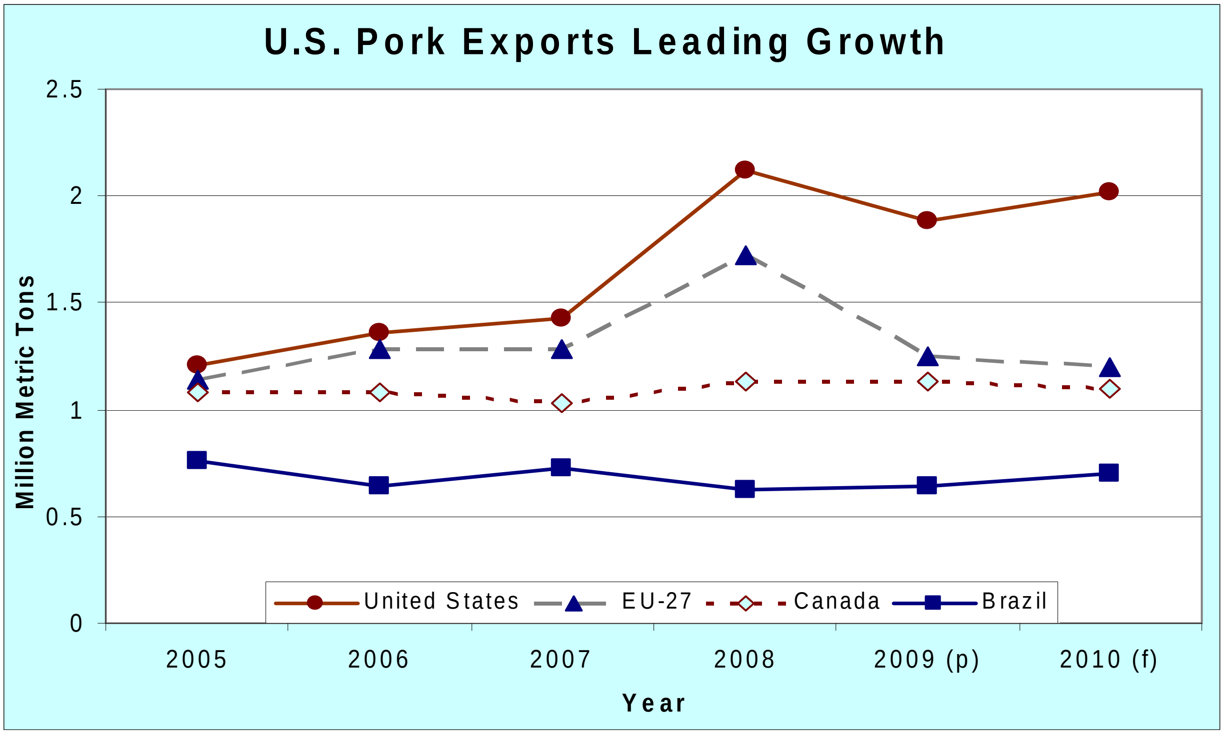
China: Production is again forecast higher, up 4 percent to 50.3 million tons. Expansion is fueled by government sow subsidies and improved animal disease control notably for Porcine Reproductive and Respiratory Syndrome (PRRS).

United States: Higher feed prices and relatively weak hog prices over the past two years results in a forecast of slightly lower production (2 percent) as producers reduce herds.

Canada: Production is forecast to fall to the lowest level 9 years, plunging 7 percent to 1.7 million tons. A shrinking swine herd, as the industry faces a third consecutive year of low returns, will translate to lower pork production.

Brazil: Production is forecast up 4 percent, bolstered by strong domestic demand, with pork prices competitive with beef, and growth in the export market.

Russia: Moderate growth is expected as government subsidies continue to stimulate investments in the pork industry. Producers are supported by more efficient operations, better swine genetics, and expected lower feed prices. Production is forecast 4 percent higher at nearly 2.3 million tons.



- **Exports: Up slightly, resuming longer term growth trend**

Exports, primarily from the United States and Brazil, are forecast up 3 percent to 5.6 million tons as exporters are optimistic about growth in the world economy in 2010 and expect demand from major markets to strengthen.

United States: Moderate gains are expected as U.S. shipments to major markets are expected to strengthen with improved economic conditions, a weaker dollar, and competitive prices. Reliance on export markets rises slightly as 20 percent of U.S. production is exported.

Brazil: Growth is expected to new markets, while demand remains from traditional markets.

EU-27 and Canada: Exports are forecast down 4 and 3 percent, respectively, as lower production reduces exportable supplies.

Pork Imports by Region (1,000 tons - CWE)					
Caribbean	52	65	73	8	12%
Central America	39	44	45	1	2%
East Asia	2,532	2,159	2,166	7	0%
European Union	56	50	50	0	0%
Former Soviet Union - 12	1,291	990	950	-40	-4%
North America	1,106	1,143	1,210	67	6%
Oceania	186	212	218	6	3%
Other Europe	146	154	157	3	2%
South America	75	71	74	3	4%
Southeast Asia	178	196	195	-1	-1%
Sub-Saharan Africa	113	160	165	5	3%

Note: Regions include a limited set of major trading countries.

- **Imports: Slight recovery due to North American growth**

North American imports are forecast to increase more rapidly than most other major importing regions as global imports rise 2 percent to 5.4 million tons.

Canada: Imports are forecast to jump 18 percent due to a stronger Canadian dollar and firm demand for high quality fresh cuts at a time when domestic pork production continues to decline.

Mexico: Imports forecast up 3 percent as demand remains firm.

United States: Imports forecast up 5 percent on tight supplies expected due to lower domestic production and greater exports.

South Korea: A stronger economy and Korean won are forecast to bolster imports up, 7 percent.

Ukraine: A currency devaluation and continued economic weakness are expected adversely affect imports, forecast 17 percent lower.

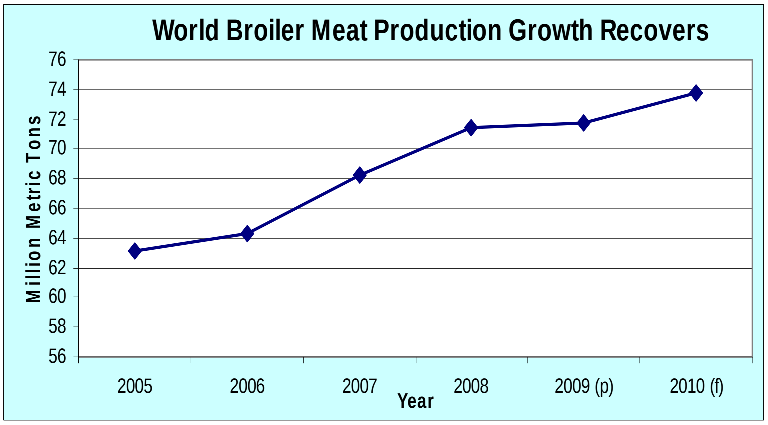
China: Imports, which account for a negligible amount of consumption, are expected to fall 20 percent to 120,000 tons, as abundant local supplies dampen import demand.

Poultry: 2010 Forecast Overview

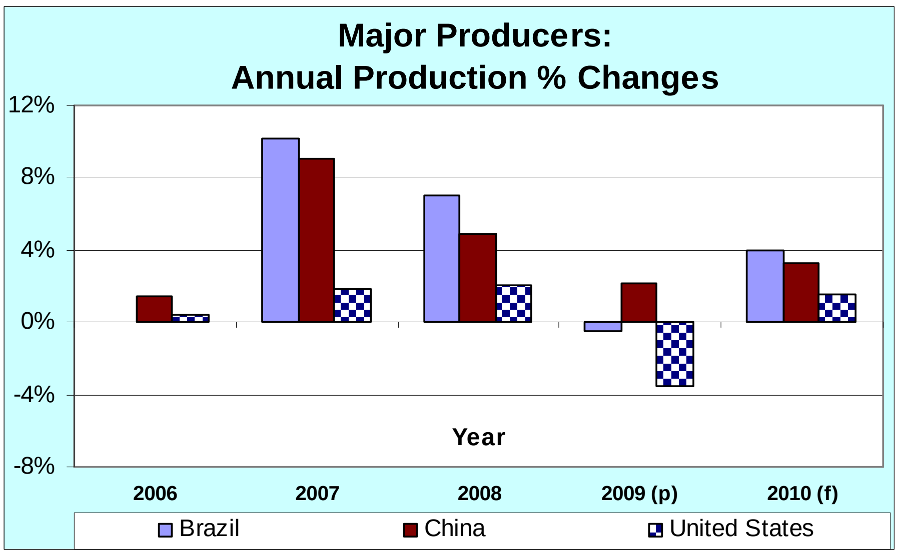
Broiler Meat

- **Production forecast to rebound in 2010**

Following recession-induced stagnant production, 2010 is forecast up 3 percent at 73.7 million tons.



Growth is forecast to be largely driven by new historic production levels in Brazil and China (4 and 3 percent higher, respectively). Brazil's rise is spurred by strong export and domestic demand. China's increase is in response to strong domestic demand due to economic expansion. Contributing to global growth will be the world's leading producer, the United States, which is forecast 2 percent higher at 16.2 million tons. Virtually all other major producers, particularly Argentina, India and Russia are forecast to expand production.

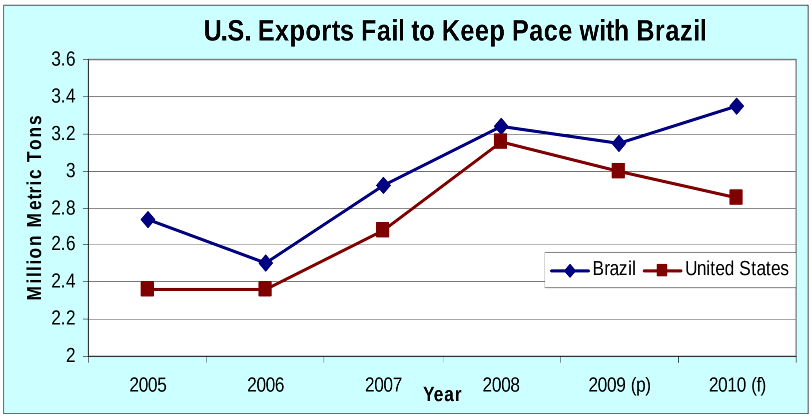


- **Exports forecast slightly higher amid growing supplies**

Exports are forecast 2 percent higher at 8.3 million tons. Plentiful supplies partnered with increasing consumption as the macroeconomic outlook improves will facilitate the positive environment for international trade.

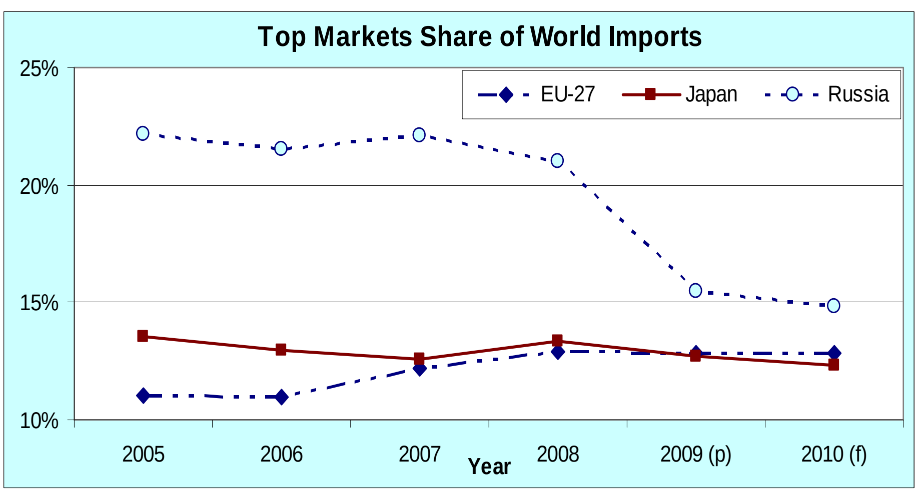
Brazil's expanding exports are forecast 6 percent higher to a record of over 3.3 million tons. Import demand is expected from a variety of markets in the Middle East and Asia as well as efforts to open new markets. Brazil's continued, long-term focus on developing non-traditional markets will buoy expansion.

U.S. exports are forecast 5 percent lower at nearly 2.9 million tons. Increased production in Russia and China to meet consumption needs as well as lingering non-tariff barriers to trade will weaken demand for U.S. product.



- **Imports forecast to rise largely on developing and non-traditional markets**

Global economic recovery is expected to stimulate consumption and raise import demand. While Russia, the EU and Japan remain the largest markets for broiler meat imports, their share of global trade is forecast to continue to stagnate or erode in 2010.



In the absence of a multilateral agreement on 2010 TRQs, the Russian forecast is based on 2009 TRQ levels and allocations. While the 2010 outlook depends greatly on future policy decisions for not only the TRQ but also the chlorine ban and imposition of non-tariff barriers, imports are forecast 4 percent lower at 855,000 tons. The reduction is expected as the Russian poultry industry, due to government financial support, will grow faster than consumption.

Larger imports are forecast to be led by non-traditional developing markets in the Middle East and Sub-Saharan Africa which are slowly accounting for a greater portion of world trade. Demand in these markets is spurred by population growth, rising incomes, and budding meat consumption. Poultry performs particularly well in these markets as it is a lower cost animal protein (compared to beef and lamb), versatile, and does not have any religious taboo attached to consumption.

Broiler Imports By Region (1,000 tons - Ready to Eat Equivalent)					
Caribbean	220	215	220	5	2%
Central America	55	60	65	5	8%
East Asia	1,511	1,453	1,440	-13	-1%
European Union	712	710	710	0	0%
Former Soviet Union - 12	1,706	1,285	1,247	-38	-3%
Middle East	1,508	1,742	1,824	82	5%
North America	615	656	676	20	3%
Oceania	1	1	1	0	0%
Other Europe	28	21	24	3	14%
South America	413	295	310	15	5%
Southeast Asia	399	400	412	12	3%
Sub-Saharan Africa	636	735	785	50	7%

Note: Regions include a limited set of major trading countries.

Turkey Meat

- **Production to rise slightly in 2010**

Following a decline in 2009, production is forecast to rebound 2 percent to nearly 5.2 million tons on gains by Brazil and the United States which more than offset a decline in the EU. The United States is expected to rise 2 percent to 2.6 million tons. Brazil's production is forecast to reach 480,000 tons on higher demand from both the domestic and foreign market. The world's largest producer, the EU is expected to be stagnant.

- **Trade rises 4 percent as world economy recovers**

Exports of turkey meat are forecast to rise nearly 4 percent to 551,000 tons. Both the United States and Brazil are expected to benefit from renewed demand. Mexican imports are forecast to rise by nearly 12 percent on demand for cuts for processing as the economy rebounds from recession.

Beef and Veal Selected Countries

1,000 Metric Tons (Carcass Weight Equivalent)

	2005	2006	2007	2008	2009	2010 Oct
Production						
Brazil	8,592	9,025	9,303	9,024	8,935	9,290
EU-27	8,090	8,150	8,188	8,090	8,000	7,950
China	5,681	5,767	6,134	6,132	5,764	5,530
Argentina	3,200	3,100	3,300	3,150	3,200	2,800
India	2,250	2,375	2,413	2,525	2,660	2,795
Australia	2,102	2,183	2,172	2,159	2,100	2,075
Mexico	1,725	1,550	1,600	1,600	1,625	1,630
Canada	1,470	1,329	1,278	1,288	1,300	1,275
Russia	1,525	1,430	1,370	1,315	1,280	1,265
Pakistan	1,005	1,057	1,113	1,168	1,226	1,250
Others	9,325	9,590	9,392	9,436	8,876	8,914
Total Foreign	44,965	45,556	46,263	45,887	44,966	44,774
United States	11,318	11,980	12,096	12,163	11,816	11,631
Total	56,283	57,536	58,359	58,050	56,782	56,405
Total Dom. Consumption						
EU-27	8,550	8,649	8,690	8,352	8,310	8,280
Brazil	6,795	6,969	7,144	7,252	7,410	7,445
China	5,614	5,692	6,065	6,080	5,751	5,530
Argentina	2,451	2,553	2,771	2,732	2,642	2,420
India	1,633	1,694	1,735	1,853	1,985	2,095
Russia	2,492	2,361	2,392	2,441	1,968	2,033
Mexico	2,028	1,894	1,961	1,966	1,880	1,920
Pakistan	1,009	1,090	1,132	1,174	1,232	1,256
Japan	1,188	1,159	1,182	1,174	1,189	1,195
Canada	1,026	1,023	1,068	1,034	1,080	1,090
Others	10,382	10,887	10,978	10,940	10,359	10,550
Total Foreign	43,168	43,971	45,118	44,998	43,806	43,814
United States	12,664	12,833	12,829	12,452	12,310	12,158
Total	55,832	56,804	57,947	57,450	56,116	55,972

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

Notes: 1/ May contain meat of other bovines.
2/ From 2009, Turkey is excluded.
3/ Data for 2009 is preliminary. Data for 2010 is forecast.

Beef and Veal Selected Countries Summary

1,000 Metric Tons (Carcass Weight Equivalent)

	2005	2006	2007	2008	2009	2010 Oct
Total Imports						
Russia	978	939	1,030	1,137	700	780
Japan	686	678	686	659	672	678
EU-27	711	717	642	465	470	490
Mexico	335	383	403	408	300	335
Vietnam	20	29	90	200	250	300
Korea, South	250	298	308	295	290	295
Canada	151	180	242	230	270	290
Egypt	215	313	361	195	150	175
Chile	200	124	151	129	145	155
Hong Kong	88	89	90	118	145	155
Others	1,527	1,687	1,840	1,941	1,793	1,700
Total Foreign	5,161	5,437	5,843	5,777	5,185	5,353
United States	1,632	1,399	1,384	1,151	1,254	1,304
Total	6,793	6,836	7,227	6,928	6,439	6,657
Total Exports						
Brazil	1,845	2,084	2,189	1,801	1,555	1,870
Australia	1,388	1,430	1,400	1,407	1,390	1,350
India	617	681	678	672	675	700
New Zealand	577	530	496	533	525	517
Canada	596	477	457	494	475	490
Argentina	754	552	534	422	560	390
Uruguay	417	460	385	361	310	360
Paraguay	193	240	206	233	210	230
EU-27	253	218	140	203	160	160
Nicaragua	59	68	83	89	90	95
Others	300	244	353	419	375	207
Total Foreign	6,999	6,984	6,921	6,634	6,325	6,369
United States	316	519	650	856	785	837
Total	7,315	7,503	7,571	7,490	7,110	7,206

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

Notes: 1/ May contain meat of other bovines.
2/ From 2009, Turkey is excluded.
3/ Data for 2009 is preliminary. Data for 2010 is forecast.

Pork Selected Countries Summary

1,000 Metric Tons (Carcass Weight Equivalent)

	2005	2006	2007	2008	2009	2010 Oct
Production						
China	45,553	46,505	42,878	46,205	48,500	50,300
EU-27	21,676	21,791	22,858	22,596	22,000	21,900
Brazil	2,710	2,830	2,990	3,015	3,123	3,249
Russia	1,735	1,805	1,910	2,060	2,205	2,290
Vietnam	1,602	1,713	1,832	1,850	1,850	1,850
Canada	1,765	1,748	1,746	1,786	1,790	1,660
Japan	1,245	1,247	1,250	1,249	1,285	1,270
Philippines	1,175	1,215	1,250	1,225	1,225	1,225
Mexico	1,195	1,158	1,152	1,161	1,150	1,175
Korea, South	1,036	1,000	1,043	1,056	1,016	1,009
Others	5,336	5,504	5,714	5,726	5,646	5,770
Total Foreign	85,028	86,516	84,623	87,929	89,790	91,698
United States	9,392	9,559	9,962	10,599	10,446	10,185
Total	94,420	96,075	94,585	98,528	100,236	101,883
Total Dom. Consumption						
China	45,139	46,051	42,726	46,412	48,300	50,300
EU-27	20,632	20,632	21,507	21,025	20,800	20,750
Russia	2,486	2,639	2,803	3,112	2,954	3,039
Brazil	1,949	2,191	2,260	2,390	2,478	2,549
Japan	2,509	2,452	2,473	2,487	2,494	2,487
Vietnam	1,583	1,731	1,855	1,880	1,894	1,889
Mexico	1,556	1,538	1,523	1,605	1,664	1,700
Korea, South	1,311	1,420	1,502	1,519	1,415	1,430
Philippines	1,198	1,239	1,275	1,270	1,267	1,268
Taiwan	944	928	926	945	958	963
Others	6,081	6,378	6,619	6,906	6,873	6,935
Total Foreign	85,388	87,199	85,469	89,551	91,097	93,310
United States	8,660	8,643	8,965	8,806	8,925	8,557
Total	94,048	95,842	94,434	98,357	100,022	101,867

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

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

Pork Selected Countries Summary

1,000 Metric Tons (Carcass Weight Equivalent)

	2005	2006	2007	2008	2009	2010 Oct
Total Imports						
Japan	1,314	1,154	1,210	1,267	1,210	1,210
Russia	752	835	894	1,053	750	750
Mexico	420	446	451	535	600	620
Korea, South	345	410	447	430	375	400
Hong Kong	263	277	302	346	345	348
Canada	139	145	171	194	170	200
Ukraine	62	62	82	238	240	200
Australia	105	109	141	152	170	175
China	88	90	198	430	150	120
Singapore	85	98	97	91	99	102
Others	703	846	655	802	841	897
Total Foreign	4,276	4,472	4,648	5,538	4,950	5,022
United States	464	449	439	377	373	390
Total	4,740	4,921	5,087	5,915	5,323	5,412
Total Exports						
EU-27	1,143	1,284	1,286	1,726	1,250	1,200
Canada	1,084	1,081	1,033	1,129	1,130	1,100
Brazil	761	639	730	625	645	700
China	502	544	350	223	230	240
Chile	128	130	148	142	142	150
Mexico	59	66	80	91	86	95
Australia	56	60	54	48	45	48
Korea, South	16	14	13	11	20	25
Vietnam	19	20	19	11	10	11
Croatia	1	2	2	3	5	6
Others	28	25	22	21	15	15
Total Foreign	3,797	3,865	3,737	4,030	3,578	3,590
United States	1,209	1,359	1,425	2,117	1,887	2,018
Total	5,006	5,224	5,162	6,147	5,465	5,608

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

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

Broiler Meat Selected Countries Summary

1,000 Metric Tons (Ready to Cook Equivalent)

	2005	2006	2007	2008	2009	2010 Oct
Production						
China	10,200	10,350	11,291	11,840	12,100	12,500
Brazil	9,350	9,355	10,305	11,033	10,980	11,420
EU-27	8,169	7,740	8,320	8,535	8,620	8,650
Mexico	2,498	2,592	2,683	2,853	2,810	2,880
India	1,900	2,000	2,240	2,490	2,550	2,650
Russia	900	1,180	1,350	1,600	1,790	1,975
Argentina	1,030	1,200	1,320	1,430	1,500	1,600
Iran	1,237	1,327	1,423	1,450	1,525	1,600
Japan	1,166	1,258	1,250	1,255	1,260	1,255
Thailand	950	1,100	1,050	1,170	1,200	1,250
Others	9,847	10,262	10,809	11,218	11,400	11,736
Total Foreign	47,247	48,364	52,041	54,874	55,735	57,516
United States	15,870	15,930	16,225	16,561	15,980	16,222
Total	63,117	64,294	68,266	71,435	71,715	73,738
Total Dom. Consumption						
China	10,087	10,371	11,415	11,954	12,220	12,606
EU-27	8,082	7,655	8,358	8,504	8,610	8,640
Brazil	6,612	6,853	7,384	7,792	7,831	8,076
Mexico	2,868	3,016	3,067	3,289	3,290	3,377
Russia	2,139	2,373	2,578	2,744	2,665	2,795
India	1,899	2,000	2,239	2,489	2,549	2,649
Japan	1,880	1,970	1,945	1,926	1,960	1,960
Iran	1,223	1,326	1,464	1,460	1,539	1,614
South Africa	1,069	1,202	1,239	1,340	1,382	1,424
Argentina	941	1,109	1,200	1,270	1,331	1,400
Others	12,260	12,649	13,607	14,537	14,737	15,211
Total Foreign	49,060	50,524	54,496	57,305	58,114	59,752
United States	13,430	13,671	13,581	13,427	13,058	13,402
Total	62,490	64,195	68,077	70,732	71,172	73,154

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

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

Broiler Meat Selected Countries Summary

1,000 Metric Tons (Ready to Cook Equivalent)

	2005	2006	2007	2008	2009	2010 Oct
Total Imports						
Russia	1,225	1,189	1,222	1,159	855	820
EU-27	609	605	673	712	710	710
Japan	748	716	696	737	700	680
Saudi Arabia	484	423	470	510	625	650
Mexico	374	430	393	447	490	505
China	219	343	482	399	370	360
Iraq	127	119	176	211	265	290
United Arab Emirates	167	182	238	289	290	290
Hong Kong	222	243	215	236	250	260
Venezuela	104	124	163	352	230	240
Others	1,939	1,998	2,353	2,717	2,752	2,873
Total Foreign	6,218	6,372	7,081	7,769	7,537	7,678
United States	15	21	28	35	36	36
Total	6,233	6,393	7,109	7,804	7,573	7,714
Total Exports						
Brazil	2,739	2,502	2,922	3,242	3,150	3,345
EU-27	696	690	635	743	720	720
Thailand	240	261	296	383	385	420
China	332	322	358	285	250	254
Argentina	92	94	125	164	174	204
Canada	102	110	139	152	147	153
Chile	60	64	39	63	110	125
Kuwait	97	38	60	70	70	70
Australia	18	16	25	27	35	40
Jordan	2	2	3	20	37	40
Others	93	98	105	112	108	110
Total Foreign	4,471	4,197	4,707	5,261	5,186	5,481
United States	2,360	2,361	2,678	3,157	2,997	2,858
Total	6,831	6,558	7,385	8,418	8,183	8,339

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

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

Turkey Meat Selected Countries Summary

1,000 Metric Tons (Ready to Cook Equivalent)

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

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

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

Turkey Meat Selected Countries Summary

1,000 Metric Tons (Ready to Cook Equivalent)

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

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

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

Cattle Selected Countries Summary

(in 1,000 head)

	2005	2006	2007	2008	2009	2010 Oct
Total Cattle Beg. Stks						
India	282,500	282,300	282,000	281,700	281,400	281,100
Brazil	169,567	172,111	173,830	175,437	179,788	185,243
China	112,354	109,908	104,651	105,948	105,722	104,900
EU-27	89,319	89,672	88,463	89,043	88,945	88,630
Argentina	53,767	54,266	55,664	55,662	54,260	50,158
Colombia	27,370	28,452	29,262	30,095	30,775	31,167
Australia	27,270	27,782	28,400	28,040	27,321	27,436
Mexico	24,309	23,669	23,316	22,850	22,700	22,168
Russia	21,100	19,850	19,000	18,370	17,900	17,464
Canada	14,925	14,655	14,155	13,895	13,180	12,820
Others	77,513	77,121	76,743	70,738	60,790	42,604
Total Foreign	899,994	899,786	895,484	891,778	882,781	863,690
United States	94,018	96,342	96,573	96,035	94,491	93,000
Total	994,012	996,128	992,057	987,813	977,272	956,690
Production (Calf Crop)						
India	56,500	57,000	57,000	57,450	57,960	58,300
Brazil	47,309	48,188	48,845	49,298	49,563	50,937
China	39,441	39,827	45,353	45,360	42,572	41,500
EU-27	32,207	30,625	31,500	31,000	30,600	30,300
Argentina	15,800	15,800	15,900	14,900	12,000	13,000
Australia	9,643	10,104	9,369	9,079	9,700	10,185
Russia	7,950	7,505	7,310	7,100	6,950	6,810
Mexico	7,275	6,925	6,732	6,754	6,775	6,797
Colombia	5,735	5,740	5,750	5,670	5,675	5,675
Canada	5,518	5,347	5,540	5,299	5,140	5,050
Others	24,072	24,900	23,640	22,615	19,069	14,390
Total Foreign	251,450	251,961	256,939	254,525	246,004	242,944
United States	37,106	37,016	36,759	36,113	35,600	35,000
Total	288,556	288,977	293,698	290,638	281,604	277,944

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

Notes: 1/ May contain other bovines.
2/ From 2008, the Philippines is excluded.
From 2009, Turkey is no excluded.
From 2010, Nicaragua and South Africa are excluded.
3/ Data for 2009 is preliminary. Data for 2010 is forecast.

Cattle Selected Countries Summary

(in 1,000 head)

	2005	2006	2007	2008	2009	2010 Oct
Total Imports						
Canada	21	38	54	49	50	50
Brazil	1	2	10	70	35	40
Egypt	51	21	18	14	30	40
Russia	14	58	75	57	35	35
Mexico	85	72	81	90	15	25
China	50	15	15	15	18	21
Japan	25	26	25	20	17	17
EU-27	4	4	4	4	4	4
Ukraine	2	1	4	3	3	3
Others	315	274	218	131	101	0
Total Foreign	568	511	504	453	308	235
United States	1,816	2,289	2,495	2,284	2,000	2,200
Total	2,384	2,800	2,999	2,737	2,308	2,435
Total Exports						
Canada	559	1,032	1,412	1,598	1,120	1,200
Mexico	1,259	1,275	1,089	738	925	1,000
Australia	573	634	719	869	910	910
Brazil	113	246	438	414	515	620
EU-27	364	469	387	376	350	350
Uruguay	10	99	46	169	310	250
China	54	54	51	33	30	28
New Zealand	50	32	28	17	10	12
Argentina	1	2	2	2	2	2
Ukraine	2	7	1	2	2	2
Others	196	285	227	99	115	2
Total Foreign	3,181	4,135	4,400	4,317	4,289	4,376
United States	22	50	66	107	60	65
Total	3,203	4,185	4,466	4,424	4,349	4,441

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

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

Swine Selected Countries Summary

(in 1,000 head)

	2005	2006	2007	2008	2009	2010 Oct
Total Beginning Stocks						
China	421,234	433,191	418,504	439,895	462,913	485,005
EU-27	156,973	159,115	161,526	159,732	152,960	149,250
Brazil	32,323	32,938	33,147	32,947	33,892	35,122
Russia	16,500	16,550	17,180	18,187	19,562	20,230
Canada	14,810	15,110	14,907	13,810	12,180	10,632
Japan	9,600	9,620	9,759	9,745	9,899	9,900
Mexico	9,068	8,911	9,021	9,401	9,310	9,500
Korea, South	8,044	8,098	8,518	8,742	8,223	8,200
Ukraine	6,466	7,052	8,055	7,020	6,526	7,150
Australia	2,530	2,490	2,471	2,605	2,181	2,200
Others	47,416	50,013	51,522	2,398	nr	nr
Total Foreign	724,964	743,088	734,610	704,482	717,646	737,189
United States	60,982	61,463	62,516	68,177	67,148	65,150
Total	785,946	804,551	797,126	772,659	784,794	802,339
Production (Pig Crop)						
China	618,587	605,823	592,080	636,817	667,669	668,500
EU-27	257,362	259,158	265,100	258,400	254,250	256,000
Russia	35,500	37,000	39,150	41,760	43,300	44,750
Brazil	32,295	33,304	34,530	34,845	35,890	37,265
Canada	33,020	32,278	31,835	31,068	28,850	26,850
Japan	17,000	16,950	17,050	16,960	17,400	17,100
Mexico	15,500	15,700	15,767	15,924	15,966	15,775
Korea, South	13,817	13,943	14,422	13,792	13,792	13,630
Ukraine	6,865	7,543	6,986	6,619	6,600	7,000
Australia	5,283	5,301	5,480	4,422	4,619	4,825
Others	78,546	81,461	84,356	5,030	nr	nr
Total Foreign	1,113,775	1,108,461	1,106,756	1,065,637	1,088,336	1,091,695
United States	103,975	105,633	112,873	115,027	114,402	114,850
Total	1,217,750	1,214,094	1,219,629	1,180,664	1,202,738	1,206,545

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

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

Swine Selected Countries Summary

(in 1,000 head)

	2005	2006	2007	2008	2009	2010 Oct
Total Imports						
Russia	84	382	377	770	1,100	1,150
Ukraine	139	40	12	86	75	80
Mexico	181	196	136	80	10	15
China	3	2	3	12	4	4
Canada	1	1	2	2	2	2
EU-27	1	6	2	2	2	2
Korea, South	2	2	3	2	1	1
Others	2	1	2	2	1	0
Total Foreign	413	630	537	956	1,195	1,254
United States	8,191	8,763	10,004	9,348	6,475	5,600
Total	8,604	9,393	10,541	10,304	7,670	6,854
Total Exports						
Canada	8,215	8,777	10,032	9,357	6,475	5,600
EU-27	637	967	901	1,508	2,100	2,400
China	1,769	1,723	1,609	1,645	1,700	1,740
Others	3	0	4	1	2	0
Total Foreign	10,624	11,467	12,546	12,511	10,277	9,740
United States	154	165	137	97	21	20
Total	10,778	11,632	12,683	12,608	10,298	9,760

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

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

Beef and Veal: Per Capita Consumption

Selected Countries

	2005	2006	2007	2008	2009	Oct 2010
Per Capita Consumption						
Argentina	62.6	64.4	69.2	67.5	64.6	58.5
Australia	37.5	36.5	34.7	35.0	35.0	35.1
Brazil	36.0	36.4	36.8	36.9	37.3	37.0
Canada	31.7	31.3	32.4	31.1	32.3	32.3
Chile	24.6	21.6	23.2	22.2	23.4	24.1
China	4.3	4.3	4.6	4.6	4.3	4.1
Colombia	17.1	17.6	16.0	14.6	16.3	18.0
EU-27	17.5	17.7	17.7	17.0	16.9	16.8
Egypt	10.4	11.6	10.4	7.5	7.1	7.5
Hong Kong	14.8	14.8	15.0	18.9	22.7	24.0
India	1.5	1.5	1.5	1.6	1.7	1.8
Iran	5.6	6.8	7.2	7.6	7.6	7.6
Japan	9.3	9.1	9.3	9.2	9.4	9.4
Kazakhstan	23.4	25.7	27.1	26.7	26.3	26.2
Korea, South	9.2	10.3	10.8	11.1	11.4	12.3
Mexico	18.9	17.4	17.9	17.7	16.8	17.0
New Zealand	22.7	31.1	29.8	29.5	28.5	28.2
Pakistan	6.2	6.6	6.7	6.8	7.0	7.0
Paraguay	28.0	24.7	26.2	24.6	23.0	22.5
Philippines	3.9	3.7	3.9	3.9	3.3	3.4
Russia	17.1	16.3	16.6	17.1	13.8	14.3
South Africa	14.8	15.5	14.5	14.0	14.0	14.1
Taiwan	4.4	4.8	4.7	4.8	5.0	5.0
Ukraine	11.2	11.7	10.9	10.5	8.9	8.6
United States	42.8	43.0	42.6	41.0	40.2	39.3
Uruguay	55.5	53.4	51.7	50.6	56.1	51.6
Uzbekistan	19.8	20.7	21.7	22.3	23.2	23.0
Venezuela	15.8	15.7	18.7	21.0	17.7	13.4

Note: May include meat of other bovines

Pork: Per Capita Consumption

Selected Countries

	2005	2006	2007	2008	2009	Oct 2010
Per Capita Consumption						
Argentina	5.4	5.9	6.2	6.2	6.2	6.1
Australia	21.3	20.9	22.2	21.7	22.0	22.1
Belarus	36.6	40.8	39.1	44.9	41.4	43.2
Canada	25.0	25.2	26.6	25.5	24.9	22.7
Chile	17.8	21.1	20.0	20.8	21.1	21.1
China	34.6	35.0	32.3	34.9	36.1	37.3
Colombia	3.0	3.2	3.7	4.3	4.4	4.5
EU-27	42.2	42.1	43.9	42.8	42.3	42.2
Hong Kong	59.6	60.4	61.5	65.0	65.1	65.4
Japan	19.7	19.2	19.4	19.5	19.6	19.6
Kazakhstan	14.5	14.8	15.1	14.9	14.9	15.0
Korea, South	27.3	29.5	31.1	31.4	29.2	29.4
Mexico	14.7	14.3	14.0	14.6	15.0	15.1
New Zealand	20.3	20.5	21.1	20.4	21.8	21.9
Norway	25.3	24.7	27.7	27.3	27.3	26.9
Russia	17.0	18.2	19.4	21.7	20.7	21.4
South Africa	3.9	3.7	3.7	3.5	3.7	3.8
Switzerland	33.2	34.0	34.7	36.7	35.8	35.8
Taiwan	41.6	40.7	40.5	41.2	41.7	41.8
Ukraine	11.6	11.7	14.7	18.0	16.0	17.0
United States	29.3	29.0	29.8	29.0	29.1	27.7
Venezuela	4.7	5.1	5.0	5.0	4.7	4.7
Vietnam	19.0	20.5	21.8	21.8	21.8	21.5

Broiler Meat: Per Capita Consumption

Selected Countries

	2005	2006	2007	2008	2009	Oct 2010
Per Capita Consumption						
Argentina	24.0	28.0	30.0	31.4	32.5	33.9
Australia	34.0	34.6	33.9	34.7	34.7	34.7
Brazil	35.0	35.8	38.1	39.7	39.4	40.2
Canada	29.8	30.1	29.9	30.0	28.8	29.4
Chile	25.6	29.2	29.6	28.3	27.0	28.4
China	7.7	7.9	8.6	9.0	9.1	9.4
Colombia	17.7	19.6	21.4	23.0	23.0	23.1
EU-27	16.5	15.6	17.0	17.3	17.5	17.6
Hong Kong	38.8	38.8	36.1	36.2	36.9	38.1
India	1.7	1.8	2.0	2.2	2.2	2.2
Indonesia	2.8	3.0	3.5	3.6	3.7	3.9
Iran	18.9	20.4	22.4	22.2	23.2	24.1
Japan	14.7	15.4	15.3	15.1	15.4	15.5
Korea, South	10.6	12.4	12.9	12.7	13.7	14.0
Kuwait	42.8	46.7	50.7	65.9	72.5	71.7
Malaysia	38.5	38.5	38.9	38.7	37.8	37.3
Mexico	27.0	28.1	28.2	29.9	29.6	30.0
Philippines	7.3	7.3	7.2	7.6	7.8	8.1
Russia	15.0	16.7	18.2	19.5	19.0	20.1
Saudi Arabia	38.1	35.4	36.8	37.6	41.3	41.6
South Africa	22.5	25.1	25.6	27.5	28.2	29.0
Taiwan	27.7	29.0	26.3	25.7	25.0	25.6
Thailand	11.9	12.4	12.5	11.9	12.1	12.5
Ukraine	9.1	11.2	13.2	17.7	17.8	18.3
United Arab Emirates	44.5	48.8	54.9	63.8	61.7	59.5
United States	45.4	45.8	45.1	44.2	42.6	43.3
Venezuela	31.5	30.7	32.3	36.6	31.7	32.0
Vietnam	3.9	4.4	5.4	6.3	6.1	6.1
Yemen	10.0	9.0	9.4	8.7	10.3	10.3

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

Notes to Readers

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

Data Modifications

The following countries have significant historical (pre-2007) changes to the PSD:

Cattle/Beef:

- Canada – Based on official Canadian data, historical changes (1990 to present) were made for cattle inventories and slaughter as well as beef production.
- Mexico – Based on additional research, historical changes (1998 to present) were made for cattle inventories and slaughter as well as beef production.
- Nicaragua – Starting in 2010, cattle is excluded.
- South Africa – Starting in 2010, cattle is excluded.
- Venezuela – Based on additional research, historical changes (2005 to present) were made for beef production.

Swine/Pork:

- Canada – Based on official Canadian data and additional research, historical changes (1990 to present) were made for swine inventories and slaughter as well as to pork production and losses.
- Mexico – Based on efforts to harmonize with official swine inventory estimates from the National System of Statistic and Geographic Information (INEGI) historical changes (1998 to present) were for swine and sow inventory as well as pork production.
- United States – Based on official U.S. data, historical changes (1993 to present) were made for pork production.

Broiler Meat:

- Iraq – Based on newly available information and additional research, production and trade has been revised for 1996 onwards. The years 1993-1995 were also added.
- Taiwan – Production revised 1999 to present based on official Taiwan data.

Conversion Rates

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

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

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

Assumptions

- **BSE:** Forecast assumes a continuation of trade policies due to BSE (bovine spongiform encephalopathy) currently in place by U.S. and Canadian trading partners as of October 9, 2009.
- **Other Diseases (AI, H1N1, FMD):** Forecast reflects policies currently in place as a result of outbreaks as of October 9, 2009.

Technical Notes

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

FAS Reports from Overseas Offices

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

PSD Online

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

Additional Resources

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

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

Future Releases and Contact Information

Please visit http://www.fas.usda.gov/dlp/livestock_poultry.asp to view archived and future releases of "Livestock and Poultry: World Markets and Trade". The next release of this circular will be in April 2010.

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