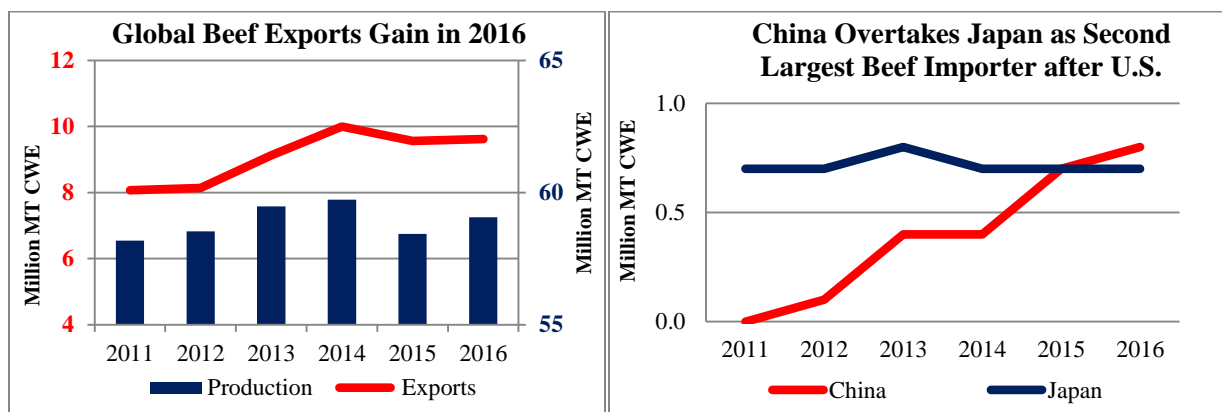


# Livestock and Poultry: World Markets and Trade

## Trade of All Meats to Expand in 2016

### Beef and Veal<sup>1</sup>:

- Global production is forecast at 59.0 million tons, up modestly from the previous year. Herd expansion in the United States, India, and Brazil will offset lower production in Australia, Argentina, and Russia. Brazilian production is expected to rebound strongly as a weaker *real* and market access improvements fuel exports. However, economic instability and weak domestic demand remain risk factors. Australian production is forecast to decline for a second year as producers rebuild herds after an extended liquidation period.
- Exports by major traders are forecast 1 percent higher to 9.6 million tons as growth to Asia offsets soft demand in other regions. Shipments from India and Brazil are expected to rebound, with India overtaking Australia as the top exporter. China is expected to become the second largest beef importer after the United States due to steady growth in consumption and new market access for Brazil and Argentina. Despite higher demand from Asia, shipments to the Middle East and North Africa will remain constrained as low oil prices continue to pressure economic growth.
- U.S. production is forecast up almost 5 percent on larger cattle supplies and higher carcass weights. Exports are expected to grow 8 percent as production expansion and declining wholesale beef prices spur demand. Lower Australian supplies will enable the United States to regain some market share in Asian markets. However, exports will remain below the 5-year average as the strong dollar continues to hamper shipments, especially to Canada and Mexico.

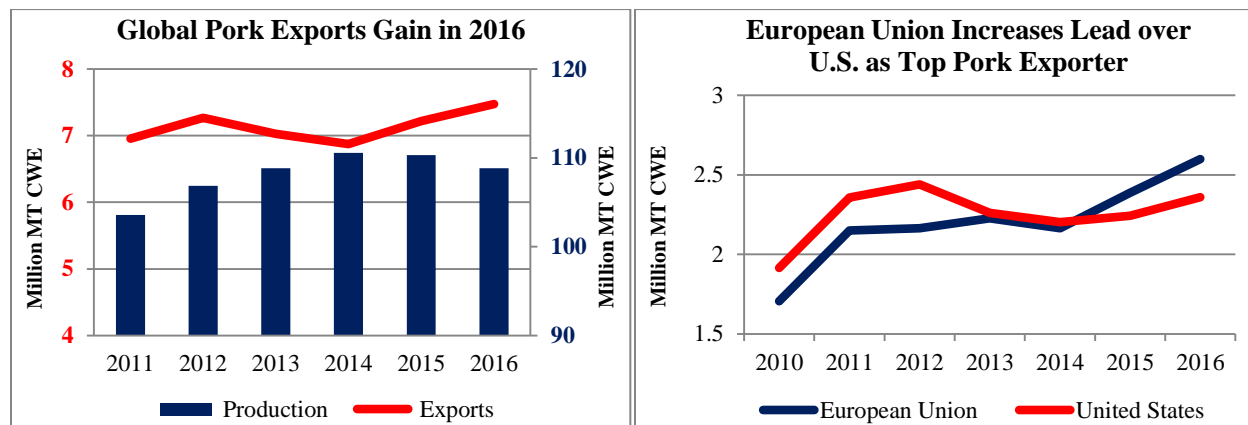


### Pork:

- Global production is forecast down 1 percent to 109.3 million tons as declines in China and the EU more than offset gains by the United States, Brazil, and Russia. Chinese production will continue to contract due to the slowing economy and continuing repercussions of environmental regulations. EU production will decline as low prices spur herd contraction. Increased exports driven by a weak currency and improved market access will raise Brazilian production. Russian production will continue moderate expansion but at a slower pace due to the struggling economy and competition from lower global pork prices.

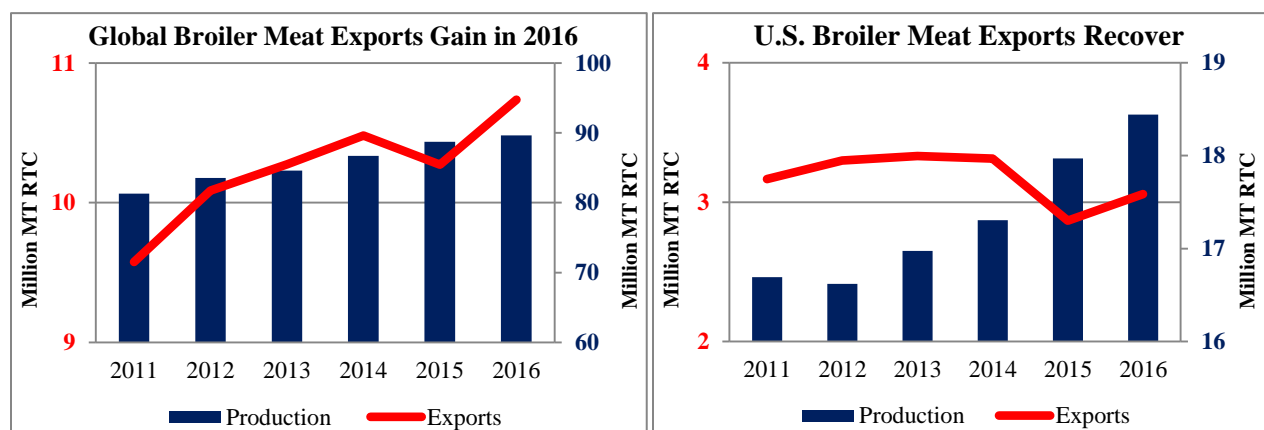
<sup>1</sup> Beef and veal estimates include meat of other bovines for certain countries. In particular, Indian estimates include carabeef (water buffalo).

- Exports by major traders are forecast 6 percent higher to a record 7.6 million tons. An increase in exportable EU and U.S. supplies will put downward pressure on global prices and stimulate demand. Shipments to Asia, in particular, are expected to flourish.
- U.S. production is forecast up 2 percent to a record 11.3 million tons on continued moderate industry growth. Exports are forecast over 5 percent higher to 2.4 million tons as competitive prices will bolster shipments to most markets, particularly China and Mexico.



### Broiler Meat:

- Global production is forecast to increase 1 percent to a record 89.7 million tons on expansion by most major traders. Brazil is expected to continue expanding on higher exports. Reduced supplies of imported breeding stock, driven by highly pathogenic avian influenza (HPAI)-related trade restrictions, will put downward pressure on production in China. Russian production will continue expanding but at a slower pace due to a struggling economy and rising production costs.
- Exports by major traders are forecast to rebound 5 percent to a record 10.8 million tons. Shipments will increase by the top two suppliers, Brazil and the United States, which account for two-thirds of world trade. Exports will be driven by increased market access, partial removal of trade restrictions on U.S. poultry from the 2015 HPAI outbreak, robust Chinese demand, and a continued weak Brazilian *real*.
- U.S. production is forecast to increase 3 percent to a record 18.4 million tons on heavier weights and increased bird numbers. Exports are expected to recover 7 percent to 3.1 million tons as a number of countries have lifted HPAI-related restrictions.



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

**April 2016**

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

Beef and Veal, Pork: 1,000 Tons Carcass Weight Equivalent / Broiler Meat: 1,000 Tons Ready to Cook Equivalent

	2011	2012	2013	2014	2015 (p)	2016 (f)	Percent Change 2015 to 2016
<b>Production</b>							
Beef and Veal	58,185	58,537	59,482	59,730	58,389	59,001	1.0%
Pork	103,581	106,868	108,823	110,559	110,321	109,306	-0.9%
Broiler Meat	81,313	83,534	84,588	86,700	88,712	89,655	1.1%
Total	243,079	248,939	252,893	256,989	257,422	257,962	0.2%
<b>Consumption</b>							
Beef and Veal	56,538	57,057	57,839	57,681	56,450	57,078	1.1%
Pork	103,181	106,381	108,402	109,966	109,845	108,908	-0.9%
Broiler Meat	79,985	81,892	83,057	85,140	86,970	87,697	0.8%
Total	239,704	245,330	249,298	252,787	253,265	253,683	0.2%
<b>Imports</b>							
Beef and Veal	6,447	6,680	7,468	7,904	7,583	7,676	1.2%
Pork	6,558	6,858	6,588	6,322	6,685	7,211	7.9%
Broiler Meat	8,227	8,541	8,684	8,940	8,668	8,734	0.8%
Total	21,232	22,079	22,740	23,166	22,936	23,621	3.0%
<b>Exports</b>							
Beef and Veal	8,072	8,139	9,126	9,994	9,554	9,633	0.8%
Pork	6,954	7,267	7,026	6,875	7,208	7,618	5.7%
Broiler Meat	9,576	10,088	10,274	10,480	10,273	10,755	4.7%
Total	24,602	25,494	26,426	27,349	27,035	28,006	3.6%
<b>U.S. Exports</b>							
Beef and Veal	1,263	1,112	1,174	1,167	1,028	1,114	8.4%
Pork	2,357	2,440	2,262	2,203	2,241	2,359	5.3%
Broiler Meat	3,165	3,299	3,332	3,312	2,866	3,057	6.7%
Total	6,785	6,851	6,768	6,682	6,135	6,530	6.4%
<b>U.S. Market Share (%) of Exports Among Major Traders</b>							
Beef and Veal	16%	14%	13%	12%	11%	12%	
Pork	34%	34%	32%	32%	31%	31%	
Broiler Meat	33%	33%	32%	32%	28%	28%	
Combined	28%	27%	26%	24%	23%	23%	

Notes: 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 markets in the world meat PSD situation. In an attempt to capture these major players, the list of countries reported changes periodically.

## Surging EU Pork Exports to Asia Disrupt U.S. Shipments

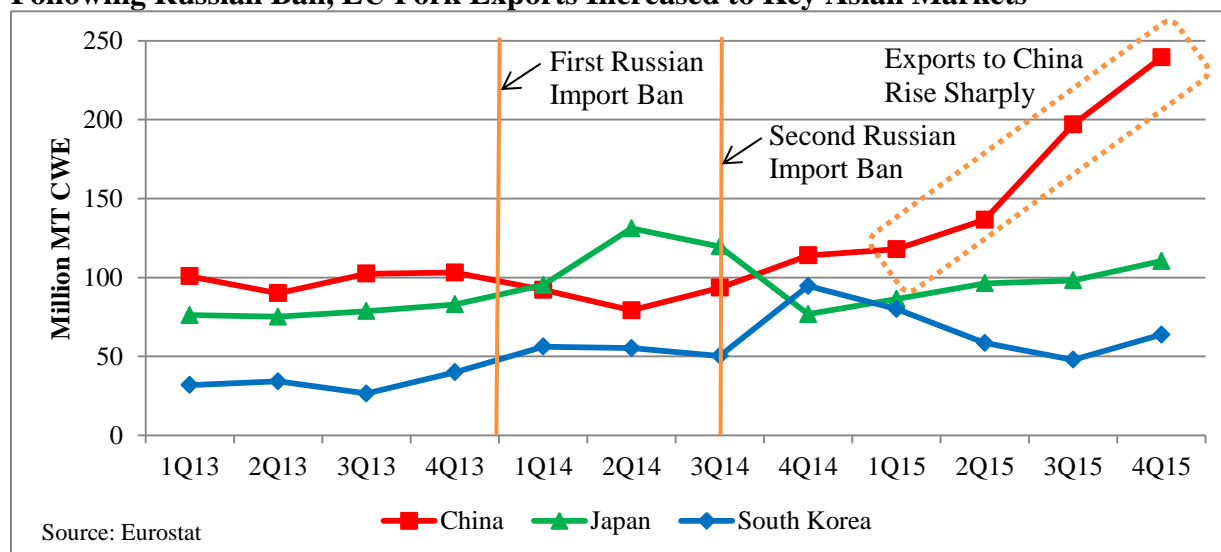
The United States and the EU are leading pork exporters which combined account for nearly two-thirds of world pork trade. In 2015, the EU surpassed the United States as the world's leading exporter and is forecast to retain this position in 2016.

### EU: World Leader Despite Setback in Russian Market

EU's rise has not come without challenges. In 2013, Russia was the EU's largest market, accounting for over 20 percent of its total exports. However, Russia imposed import restrictions on the EU in late January 2014 due to outbreaks of African swine fever (ASF), shutting it out of the market. In addition to the disease-based restriction, EU pork was also included in the August 2014 Russian ban on certain agricultural products from the United States, Canada, Australia, EU, and Norway.

Although the EU lost a significant market when banned by Russia, considerable market share has since developed in Asian markets. To offset the loss of Russia, the EU shipped more to Japan during the first half of 2014. In the second half of 2014, gains were made in shipments to both South Korea and China. During the following year (2015), EU pork exports to China increased nearly 82 percent. While Japan, Korea, and China accounted for nearly 38 percent of total EU pork shipments in 2013, these markets rose to nearly 56 percent in 2015.

### Following Russian Ban, EU Pork Exports Increased to Key Asian Markets



### EU Gains Help Depress U.S. Shipments to Key Asian Markets

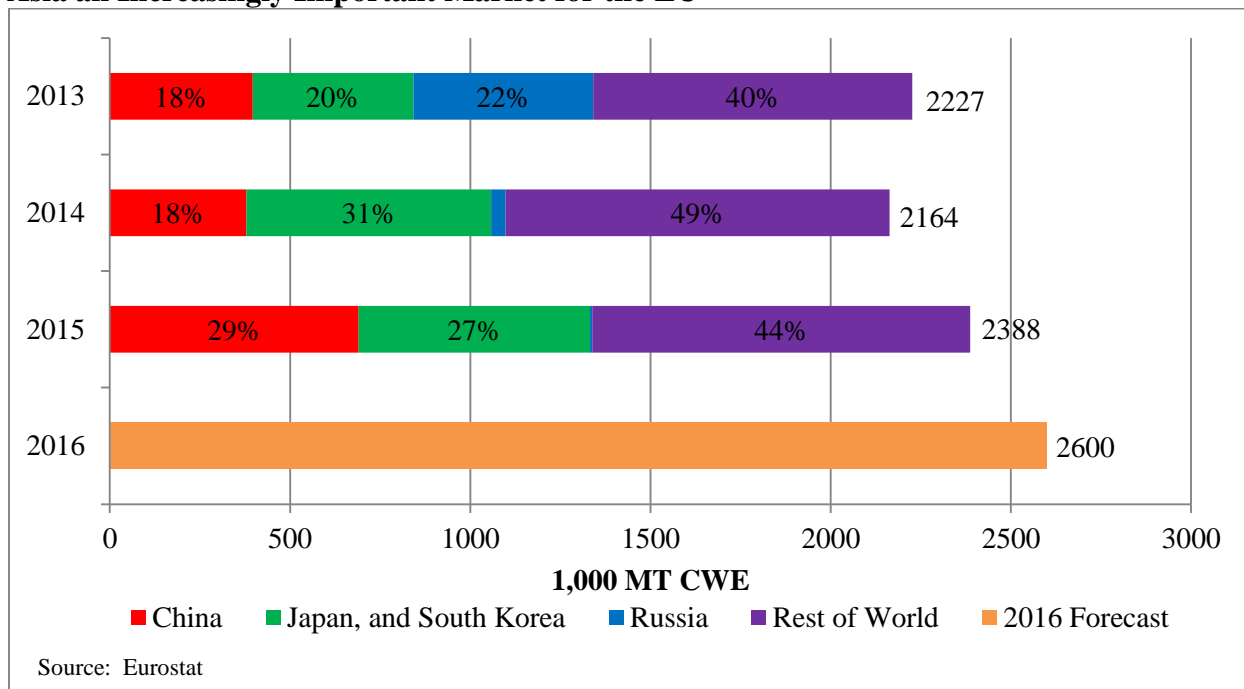
EU pork exports to all destinations increased 7 percent from 2013 to 2015 while total U.S. shipments only increased 1 percent. The United States was constrained by the loss of the Russian market, tight supplies due to porcine epidemic diarrhea virus (PEDv), elevated prices, and a strong dollar. Its competitiveness vis-à-vis the EU was significantly reduced. In addition, the EU's ban on producing pork with beta-agonists allows them greater flexibility in meeting the

demands of Asian markets. U.S. pork exports to Japan, Korea, and China declined 5 percent during the 2013 to 2015 period and also accounted for a smaller portion (falling from 40 to 36 percent) of total U.S. shipments. Thus EU expanded not only shipments to key Asian markets in terms of volumes but also market share.

### EU Forecast to Gain Further Ground on Pork Exports to Asia in 2016

Combined pork imports for China, Japan and South Korea are forecast up 11 percent for 2016. Both South Korea and Japan imports are forecast slightly higher (2 and 4 percent, respectively) while Chinese imports are forecast 26 percent higher. Stronger demand by these key markets will facilitate the EU remaining the top global pork exporter in 2016. The United States will continue to be challenged to compete with the EU due to a strong dollar and relatively higher prices. Export expansion is forecast for both the EU and the United States in 2016, however the EU's rise is slightly stronger at 9 percent compared to the United States at 5 percent.

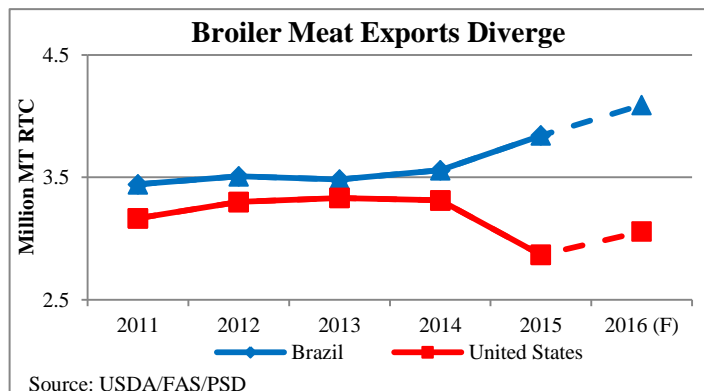
### Asia an Increasingly Important Market for the EU



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## U.S. and Brazilian Broiler Meat Exports Higher in 2016 Despite Trade Restrictions and Currency Constraints

In 2015, total broiler meat exports by major traders declined for the first time since 2006. There was also a major shift in the correlation between Brazil and the United States, which together account for about two-thirds of global trade. For the past 10 years, the difference between U.S. and Brazilian exports has been relatively consistent and shipments generally trended in the same direction. However, Brazilian exports increased 283,000 MT in 2015 while U.S. exports declined 445,000 MT.



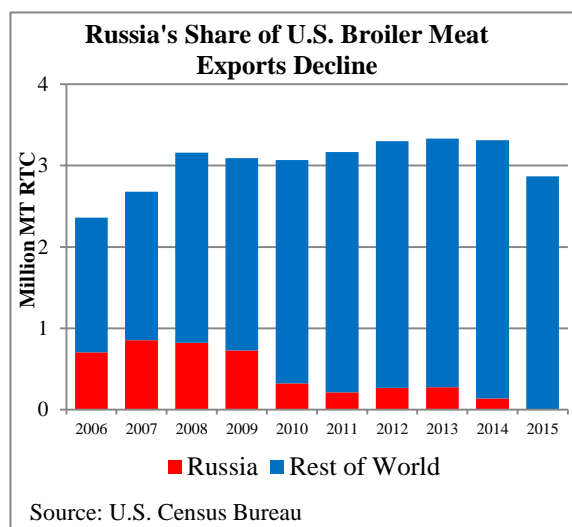
Factors	U.S.	Brazil
Russian Market	-	-
Strong U.S. Dollar	-	+
Imposed HPAI-Related Restrictions on U.S. Poultry	-	+
Foreign Exchange Shortages (Angola/Venezuela)	-	-
Robust Demand: Middle East	-	+

### Negative Factors for the United States Benefited Brazil in 2015

The principle factors that negatively impacted U.S. shipments in 2015 included the ongoing Russian ban on imports of certain agricultural products from the United States, Canada, Australia, EU, and Norway, highly pathogenic avian influenza (HPAI)-related trade restrictions, the strong U.S. dollar, and foreign exchange shortages in a number of countries. While some of these factors led to the decline of shipments to certain markets for both exporters, others helped Brazilian exports grow significantly compared to the United States. In addition, Brazil benefited from robust Middle East demand.

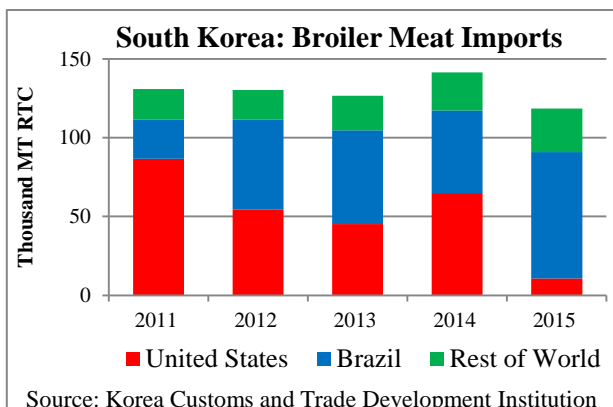
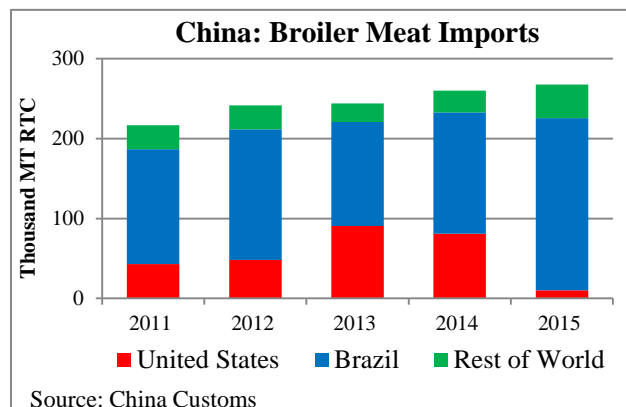
### U.S. Shipments Declined to Russia

Due to Russia's ban in August 2014, U.S. exports to Russia fell by 138,000 MT, the largest single market decline for U.S. shipments in 2015. When U.S. shipments to Russia declined during 2008-2011, due in part to increased Russian production and lower quotas, U.S. product that would have gone to Russia was absorbed by other markets. However, in 2015, the agricultural ban and other factors placing constraints on U.S. exports made it more difficult to displace shipments intended for the Russian market. Due to a weak *ruble*, increased Russian production, and competitively priced domestic products, imports from Brazil also declined by 34,000 MT in 2015. However, Russia was not as large a market, accounting for less than 5 percent of total Brazilian shipments.



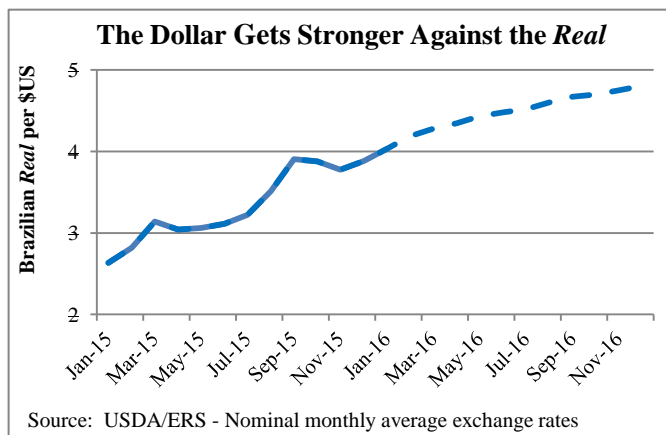
## HPAI-Related Trade Restrictions Impeded U.S. Shipments

The United States shrank while Brazil grew in several markets that placed HPAI-related trade restrictions on U.S. products in 2015. The December 2014 outbreak of HPAI prompted a number of trading partners to place regional (zone, county, or state) or U.S.-wide restrictions on poultry products. China and South Korea were the two largest importers that placed U.S.-wide restrictions on the United States. While U.S. exports fell to virtually zero to these markets, Brazilian exports increased significantly, growing over 100,000 MT to both markets combined.



## A Strong Dollar Hindered U.S. Exports

An excess of exportable supplies caused by trade restrictions weakened U.S. prices in 2015. However, these lower prices were largely offset by a stronger dollar. A weakened *real* also reduced competitiveness of the United States versus Brazil.



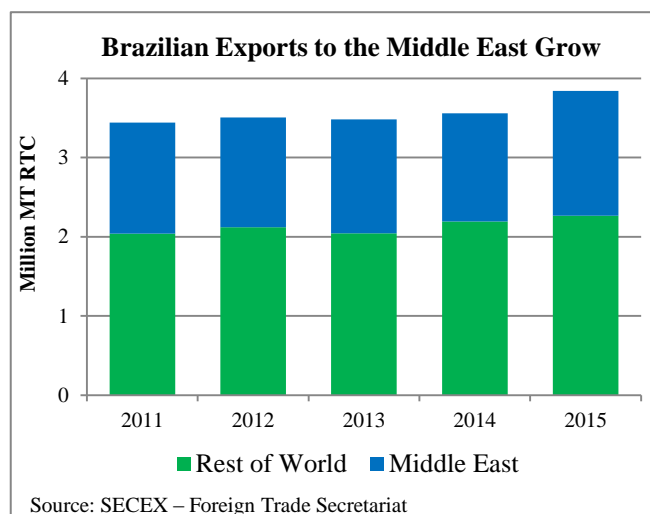
## Low Oil Prices Impacted Demand by Several Major Importers

Depressed oil prices in 2015 resulted in lower revenues and foreign exchange shortages for a number of key importers. Hence, shipments fell significantly to Venezuela and Angola where oil revenues are a substantial part of the Gross Domestic Product (GDP) and the cost to produce oil is high compared to other major broiler meat importers. With these countries facing liquidity issues, their imports from Brazil and the United States declined significantly in 2015. Angola was the second largest U.S. market in 2014 but exports declined by 92,000 MT in 2015. Similarly, Venezuela was the fourth-largest market for Brazil and shipments fell 71,000 MT from 2014.



## Robust Middle East Demand Bolstered Brazilian Shipments

Brazilian exports grew over 200,000 MT to the Middle East in 2015, offsetting losses in Venezuela, Angola, and Russia. The largest increase in shipments was to Saudi Arabia followed by the United Arab Emirates. Although oil revenue makes up a significant share of GDP in these markets, the countries have large foreign exchange reserves and low oil production costs, which help to lessen the impact of low oil prices. The United States is less competitive in the Middle East, in part due to fewer facilities that are able to provide halal-certified products.



## 2016: Export Growth Forecast for Brazil and the United States

Total exports by major suppliers are forecast to increase in 2016. For both Brazil and the United States, exports will expand and recover by 6 and 7 percent, respectively. The two countries will face challenges similar to those in 2015, but also will benefit from new opportunities in 2016 through increased market access.

2016 Positive and Negative Market Impacts		
Impact	U.S.	Brazil
Russian Market	-	-
Strong U.S. Dollar	-	+
Partial Removal of HPAI-Related Restrictions on U.S. Poultry	+	-
Robust Demand: China	-	+

### Brazil:

Export growth in 2016 will continue to be driven by the weak Brazilian *real*, ongoing HPAI-related trade restrictions on competitors, and expanded access to a number of smaller markets. However, slower growth is expected in traditional export markets.

Shipments are expected to increase to China, which still has HPAI-related restrictions on U.S. poultry products. Exports will also grow to a number of markets that were recently opened, such as Pakistan, or where Brazil has expanded access through the approval of additional poultry plants, such as Malaysia and Mexico.

Exports to Saudi Arabia and Japan – Brazil’s top markets – will slow as both countries face excess supplies on record 2015 imports. Exports to Russia will decline further on a weak *ruble* and higher domestic production at competitive prices.

*United States:*

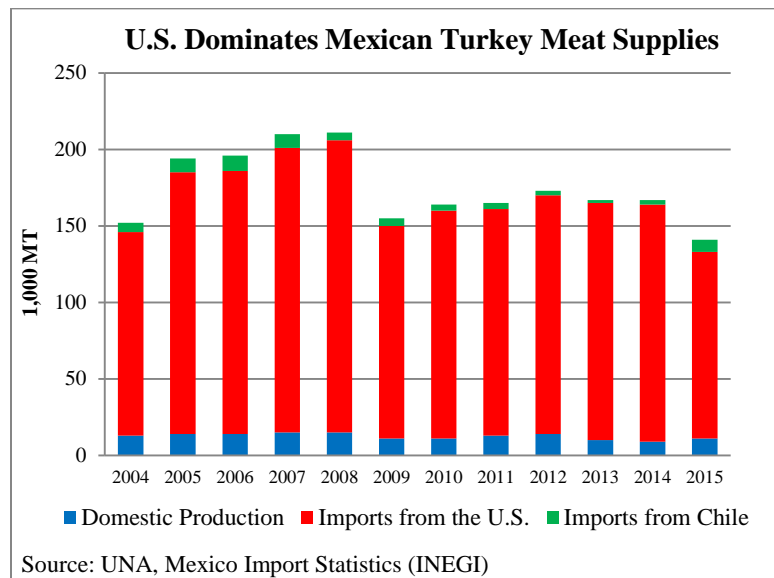
Export growth in 2016 is expected in a number of markets that removed HPAI-related restrictions as regions were declared disease-free. Several markets, such as Kazakhstan and Iraq, which removed restrictions on regions (zones, counties, or states) are expected to grow. Exports are also expected to increase to countries, such as South Africa, that had U.S.-wide restrictions during 2015 and have since transitioned to regional restrictions. Additionally, the recent agreement on a bone-in chicken quota between U.S. and South African governments will lead to expanded exports.

The removal of restrictions and transition to regional restrictions from the end of 2015 and into 2016 offer better export opportunities provided there are no further outbreaks of HPAI in major broiler-producing states. However, a stronger dollar in 2016 will likely continue to constrain U.S. competitiveness. The United States will also face HPAI-related restrictions by China and South Korea and the continuing Russian ban. Despite these trade restrictions and possible continued currency constraints on oil-reliant importers, U.S. exports in 2016 are expected to recover.

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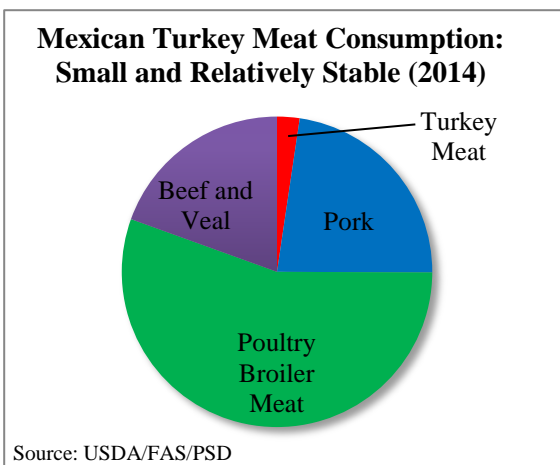
## Mexican Turkey Meat Consumption Driven by Trade with U.S.

The United States and Mexico have a unique and nearly exclusive turkey meat trade relationship. More than 90 percent of Mexican turkey meat consumption is product imported from the United States. Similarly, U.S. turkey meat exports are dependent on Mexico which comprises almost half of total U.S. shipments. Exports account for slightly more than 10 percent of U.S. turkey meat production.



### Domestic Production Limited

Mexican turkey meat production is limited, and industry growth is challenged. Not only is there intense competition from imports, but the consumption of domestic product is highly seasonal. A significant portion of domestic production is sold during holidays (Christmas and Easter) and largely as uncooked whole birds.



### U.S. Turkey Meat Shipments to Mexico Driven By Processing....

According to Mexico's National Poultry Association (UNA), almost 90 percent of imports of U.S. turkey meat is further processed by Mexican industry into sausage/hot dogs, ham/cold cuts, and turkey legs. For example, more than 80 percent of hams produced are blended turkey-pork hams. Processors have some flexibility in the composition of blended meat products, so shifts in relative prices may encourage processors to adjust the meat ingredients.

### ...And Also Competing Pork Price

There is a clear correlation between the pork-to-turkey meat (imported for further processing) price ratio and the quantity of imported turkey meat as shown in the following graph. As pork becomes cheaper relative to turkey meat, Mexico imports less turkey meat from the United States.<sup>1</sup> Similarly, as pork becomes more expensive relative to turkey meat, Mexico imports more turkey meat from the United States.

<sup>1</sup> H.S. Code 02072699 ("Other") comprises 65 percent of Mexican imports of U.S. turkey meat. H.S. Code 02031201 (Legs, Shoulders and Cuts, Without Bones) comprises 71 percent of Mexican imports of U.S. pork.



## **Chile is a Minor Competitor in Mexico**

Despite the downturn in U.S. turkey meat, market shares remain relatively unchanged. Mexico imports small amounts of turkey meat from Chile, primarily turkey breast, which is priced and consumed differently than turkey meat for further processing. Thus, Chilean and U.S. products are not in direct competition. As U.S. turkey meat shipments declined in 2015, Chile's import share grew to 6 percent (from 2 percent in 2014). Mexico currently imports only from the United States and Chile.

## **Outlook for 2016**

In 2016, the impact of last year's HPAI outbreaks will have residual impacts on turkey meat shipments to Mexico. By the third and fourth quarters of 2016, production in the United States is forecast above year-earlier, putting downward pressure on turkey meat prices. Thus, as supplies rebound, the importance of the pork-to-turkey meat price ratio in driving shipments will increase. A stronger decline in pork prices compared to turkey meat is forecast for 2016. Turkey meat will remain relatively expensive, weakening Mexican demand for U.S. turkey meat.

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

	2012	2013	2014	2015	2016 Oct	2016 Apr
<b>Production</b>						
Brazil	9,307	9,675	9,723	9,425	9,600	9,620
European Union	7,708	7,388	7,443	7,670	7,560	7,680
China	6,623	6,730	6,890	6,700	6,785	6,785
India	3,491	3,800	4,100	4,100	4,500	4,300
Argentina	2,620	2,850	2,700	2,740	2,680	2,680
Australia	2,152	2,359	2,595	2,547	2,300	2,180
Mexico	1,821	1,807	1,827	1,850	1,865	1,865
Pakistan	1,587	1,630	1,675	1,725	1,775	1,775
Russia	1,380	1,380	1,370	1,355	1,300	1,310
Canada	1,060	1,049	1,099	1,050	975	1,065
Others	8,940	9,063	9,232	8,412	8,467	8,413
<b>Total Foreign</b>	46,689	47,731	48,654	47,574	47,807	47,673
<b>United States</b>	11,848	11,751	11,076	10,815	11,389	11,328
<b>Total</b>	58,537	59,482	59,730	58,389	59,196	59,001
<b>Total Dom. Consumption</b>						
Brazil	7,845	7,885	7,896	7,781	7,890	7,820
European Union	7,760	7,520	7,514	7,730	7,620	7,720
China	6,667	7,112	7,277	7,339	7,450	7,590
Argentina	2,458	2,664	2,503	2,554	2,415	2,450
India	2,080	2,035	2,018	2,294	2,325	2,350
Russia	2,398	2,393	2,289	1,971	2,025	1,925
Mexico	1,836	1,873	1,839	1,797	1,730	1,780
Pakistan	1,538	1,576	1,617	1,661	1,706	1,706
Japan	1,255	1,232	1,225	1,186	1,215	1,190
Canada	1,019	1,023	999	942	890	920
Others	10,462	10,918	11,262	9,921	10,069	10,073
<b>Total Foreign</b>	45,318	46,231	46,439	45,176	45,335	45,524
<b>United States</b>	11,739	11,608	11,242	11,274	11,671	11,554
<b>Total</b>	57,057	57,839	57,681	56,450	57,006	57,078

Notes: Includes meat of other bovines for certain countries. India includes carabeef (water buffalo). From 2015, the following countries are excluded: Albania, Azerbaijan, Cote d'Ivoire, Georgia, Ghana, Jamaica, Senegal and Uzbekistan. The notation of a month beneath a year conveys the month in which the forecast for that year was released.

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

	2012	2013	2014	2015	2016 Oct	2016 Apr
<b>Total Imports</b>						
China	86	412	417	663	700	825
Japan	737	760	739	707	727	725
Russia	1,027	1,023	929	625	735	625
Korea, South	370	375	392	414	454	455
Hong Kong	241	473	646	339	500	400
European Union	348	376	372	363	370	360
Egypt	250	195	270	360	285	300
Canada	301	295	284	280	285	270
Chile	187	245	241	245	230	260
Malaysia	174	194	205	235	250	250
Others	1,952	2,100	2,072	1,823	1,794	1,891
<b>Total Foreign</b>	<b>5,673</b>	<b>6,448</b>	<b>6,567</b>	<b>6,054</b>	<b>6,330</b>	<b>6,361</b>
<b>United States</b>	<b>1,007</b>	<b>1,020</b>	<b>1,337</b>	<b>1,529</b>	<b>1,381</b>	<b>1,315</b>
<b>Total</b>	<b>6,680</b>	<b>7,468</b>	<b>7,904</b>	<b>7,583</b>	<b>7,711</b>	<b>7,676</b>
<b>Total Exports</b>						
India	1,411	1,765	2,082	1,806	2,175	1,950
Brazil	1,524	1,849	1,909	1,705	1,775	1,850
Australia	1,407	1,593	1,851	1,854	1,625	1,525
New Zealand	517	529	579	639	598	584
Canada	335	332	378	391	370	415
Paraguay	251	326	389	381	410	380
Uruguay	360	340	350	373	395	380
European Union	296	244	301	303	310	320
Mexico	200	166	194	228	300	250
Argentina	164	186	197	186	265	230
Others	562	622	597	660	603	635
<b>Total Foreign</b>	<b>7,027</b>	<b>7,952</b>	<b>8,827</b>	<b>8,526</b>	<b>8,826</b>	<b>8,519</b>
<b>United States</b>	<b>1,112</b>	<b>1,174</b>	<b>1,167</b>	<b>1,028</b>	<b>1,100</b>	<b>1,114</b>
<b>Total</b>	<b>8,139</b>	<b>9,126</b>	<b>9,994</b>	<b>9,554</b>	<b>9,926</b>	<b>9,633</b>

Notes: Includes meat of other bovines for certain countries. Indian exports are carabeef (water buffalo). From 2015, the following countries are excluded: Albania, Azerbaijan, Cote d'Ivoire, Georgia, Ghana, Jamaica, Senegal and Uzbekistan. The notation of a month beneath a year conveys the month in which the forecast for that year was released.

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

	2012	2013	2014	2015	2016 Oct	2016 Apr
<b>Total Cattle Beg. Stks</b>						
India	300,000	299,606	300,600	301,100	301,600	302,600
Brazil	197,550	203,273	207,959	213,035	219,093	219,180
China	103,605	103,434	103,000	100,450	100,250	100,275
European Union	87,054	87,106	87,619	88,406	88,600	88,750
Argentina	49,597	51,095	51,545	51,545	51,995	51,995
Australia	28,506	28,418	29,291	29,102	26,150	27,682
Russia	20,134	19,930	19,564	19,152	18,665	18,838
Mexico	20,090	18,521	17,760	17,120	16,450	16,605
Canada	12,245	12,305	12,220	11,920	11,930	11,960
Uruguay	11,232	11,384	11,903	12,053	12,063	11,960
Others	68,064	66,101	64,052	32,263	31,786	31,587
<b>Total Foreign</b>	<b>898,077</b>	<b>901,173</b>	<b>905,513</b>	<b>876,146</b>	<b>878,582</b>	<b>881,432</b>
<b>United States</b>	<b>91,160</b>	<b>90,095</b>	<b>88,526</b>	<b>89,143</b>	<b>92,900</b>	<b>91,988</b>
<b>Total</b>	<b>989,237</b>	<b>991,268</b>	<b>994,039</b>	<b>965,289</b>	<b>971,482</b>	<b>973,420</b>
<b>Production (Calf Crop)</b>						
India	63,500	65,000	66,000	67,000	68,000	68,000
China	48,000	48,800	47,900	49,000	49,050	49,050
Brazil	49,690	50,185	49,600	48,220	48,250	48,250
European Union	29,800	29,050	29,280	29,550	29,250	29,600
Argentina	13,700	14,000	13,300	13,700	14,000	14,000
Australia	8,539	10,783	11,063	9,664	9,500	9,200
Mexico	6,800	6,700	6,750	6,850	6,925	7,000
Russia	6,920	6,820	6,670	6,635	6,406	6,519
New Zealand	4,926	4,923	5,440	5,040	5,150	5,012
Canada	4,462	4,516	4,606	4,262	4,375	4,410
Others	14,748	14,914	14,429	10,234	10,020	10,177
<b>Total Foreign</b>	<b>251,085</b>	<b>255,691</b>	<b>255,038</b>	<b>250,155</b>	<b>250,926</b>	<b>251,218</b>
<b>United States</b>	<b>34,469</b>	<b>33,730</b>	<b>33,522</b>	<b>34,302</b>	<b>35,000</b>	<b>34,700</b>
<b>Total</b>	<b>285,554</b>	<b>289,421</b>	<b>288,560</b>	<b>284,457</b>	<b>285,926</b>	<b>285,918</b>

Notes: May contain other bovines. From 2015, Colombia and Venezuela are excluded. The notation of a month beneath a year conveys the month in which the forecast for that year was released.



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

	2012	2013	2014	2015	2016 Oct	2016 Apr
<b>Total Imports</b>						
Egypt	95	100	200	120	220	300
China	117	98	230	125	200	150
Russia	143	97	74	85	80	55
Canada	56	48	45	36	40	40
Mexico	10	30	28	23	25	25
Japan	14	12	11	9	8	8
Brazil	0	0	10	2	3	3
Belarus	2	1	1	1	0	1
Argentina	0	0	0	0	0	0
Australia	0	0	0	0	0	0
Others	619	715	566	1	0	0
<b>Total Foreign</b>	1,056	1,101	1,165	402	576	582
<b>United States</b>	2,283	2,033	2,358	1,984	2,050	1,775
<b>Total</b>	3,339	3,134	3,523	2,386	2,626	2,357
<b>Total Exports</b>						
Mexico	1,539	1,045	1,176	1,213	1,200	1,125
Australia	620	851	1,297	1,336	1,100	1,100
Canada	821	1,044	1,245	832	925	750
European Union	678	504	499	700	600	750
Brazil	512	689	649	212	300	300
Uruguay	78	41	140	217	140	215
Ukraine	2	11	27	45	55	55
Russia	9	14	27	24	20	24
China	26	19	20	20	20	20
New Zealand	42	33	79	21	25	15
Others	302	236	86	1	1	1
<b>Total Foreign</b>	4,629	4,487	5,245	4,621	4,386	4,355
<b>United States</b>	191	161	108	72	80	75
<b>Total</b>	4,820	4,648	5,353	4,693	4,466	4,430

Notes: May contain other bovines. From 2015, Colombia and Venezuela and excluded. The notation of a month beneath a year conveys the month in which the forecast for that year was released.

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

	2012	2013	2014	2015	2016 Oct	2016 Apr
<b>Production</b>						
China	53,427	54,930	56,710	54,870	56,500	53,500
European Union	22,526	22,359	22,540	23,350	22,900	23,230
Brazil	3,330	3,335	3,400	3,519	3,510	3,609
Russia	2,175	2,400	2,510	2,615	2,780	2,675
Vietnam	2,307	2,349	2,425	2,450	2,475	2,475
Canada	1,844	1,822	1,805	1,890	1,880	1,925
Philippines	1,310	1,340	1,353	1,370	1,390	1,400
Mexico	1,239	1,284	1,290	1,323	1,385	1,385
Japan	1,297	1,309	1,264	1,254	1,290	1,280
Korea, South	1,086	1,252	1,200	1,217	1,230	1,240
Others	5,773	5,918	5,692	5,342	5,308	5,253
<b>Total Foreign</b>	96,314	98,298	100,189	99,200	100,648	97,972
<b>United States</b>	10,554	10,525	10,370	11,121	11,314	11,334
<b>Total</b>	106,868	108,823	110,559	110,321	111,962	109,306
<b>Total Dom. Consumption</b>						
China	53,922	55,456	57,195	55,668	57,140	54,570
European Union	20,382	20,147	20,390	20,974	20,582	20,642
Russia	3,239	3,267	3,024	3,016	2,979	3,020
Brazil	2,670	2,751	2,845	2,893	2,931	2,940
Japan	2,557	2,549	2,543	2,568	2,540	2,590
Vietnam	2,275	2,315	2,389	2,412	2,437	2,437
Mexico	1,850	1,956	1,991	2,176	2,195	2,335
Korea, South	1,546	1,628	1,660	1,813	1,857	1,870
Philippines	1,446	1,511	1,551	1,544	1,609	1,584
Taiwan	906	892	875	930	928	938
Others	7,147	7,265	6,852	6,481	6,619	6,488
<b>Total Foreign</b>	97,940	99,737	101,315	100,475	101,817	99,414
<b>United States</b>	8,441	8,665	8,651	9,370	9,409	9,494
<b>Total</b>	106,381	108,402	109,966	109,845	111,226	108,908

Note: From 2015, the following countries are excluded: Albania, Armenia, Congo (Brazzaville), Gabon, Georgia, Ghana, Jamaica, North Korea, Kyrgyzstan, Moldova, Switzerland and Trinidad and Tobago. From 2016, Venezuela is excluded. The notation of a month beneath a year conveys the month in which the forecast for that year was released.

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

	2012	2013	2014	2015	2016 Oct	2016 Apr
<b>Total Imports</b>						
Japan	1,259	1,223	1,332	1,270	1,250	1,320
China	730	770	761	1,029	850	1,300
Mexico	706	783	818	981	960	1,100
Korea, South	502	388	480	599	625	610
Hong Kong	414	399	347	397	400	410
Russia	1,077	868	515	408	200	355
Australia	194	183	191	220	250	240
Canada	240	220	214	216	210	210
Philippines	138	172	199	175	220	185
Taiwan	32	40	63	107	130	125
Others	1,202	1,143	945	779	917	821
<b>Total Foreign</b>	<b>6,494</b>	<b>6,189</b>	<b>5,865</b>	<b>6,181</b>	<b>6,012</b>	<b>6,676</b>
<b>United States</b>	<b>364</b>	<b>399</b>	<b>457</b>	<b>504</b>	<b>454</b>	<b>535</b>
<b>Total</b>	<b>6,858</b>	<b>6,588</b>	<b>6,322</b>	<b>6,685</b>	<b>6,466</b>	<b>7,211</b>
<b>Total Exports</b>						
European Union	2,165	2,227	2,164	2,388	2,330	2,600
Canada	1,243	1,246	1,218	1,236	1,210	1,250
Brazil	661	585	556	627	580	670
China	235	244	276	231	250	230
Chile	180	164	163	178	200	200
Mexico	95	111	117	128	150	150
Australia	36	36	37	36	40	40
Vietnam	36	40	40	40	40	40
Serbia	6	4	25	19	45	20
South Africa	2	4	13	17	14	20
Others	168	103	63	67	30	39
<b>Total Foreign</b>	<b>4,827</b>	<b>4,764</b>	<b>4,672</b>	<b>4,967</b>	<b>4,889</b>	<b>5,259</b>
<b>United States</b>	<b>2,440</b>	<b>2,262</b>	<b>2,203</b>	<b>2,241</b>	<b>2,370</b>	<b>2,359</b>
<b>Total</b>	<b>7,267</b>	<b>7,026</b>	<b>6,875</b>	<b>7,208</b>	<b>7,259</b>	<b>7,618</b>

Note: From 2015, the following countries are excluded: Albania, Armenia, Congo (Brazzaville), Gabon, Georgia, Ghana, Jamaica, North Korea, Kyrgyzstan, Moldova, Switzerland and Trinidad and Tobago. From 2016, Venezuela is excluded. The notation of a month beneath a year conveys the month in which the forecast for that year was released.

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

	2012	2013	2014	2015	2016 Oct	2016 Apr
<b>Total Beginning Stocks</b>						
China	468,627	475,922	474,113	465,830	420,200	451,130
European Union	149,809	146,982	146,172	148,341	147,500	148,500
Brazil	38,336	38,577	38,844	39,395	40,150	39,422
Russia	17,258	18,816	19,081	19,405	20,125	21,267
Canada	12,625	12,610	12,940	13,165	13,300	13,260
Korea, South	8,171	9,916	9,912	10,090	10,200	10,187
Mexico	9,276	9,510	9,775	9,700	9,600	9,917
Japan	9,735	9,685	9,537	9,440	9,590	9,600
Ukraine	7,373	7,577	7,922	7,492	7,300	7,245
Belarus	3,989	4,243	3,267	2,924	2,650	3,200
Others	2,285	2,138	2,098	2,271	2,300	2,164
<b>Total Foreign</b>	727,484	735,976	733,661	728,053	682,915	715,892
<b>United States</b>	66,259	66,224	64,775	67,776	68,025	68,389
<b>Total</b>	793,743	802,200	798,436	795,829	750,940	784,281
<b>Production (Pig Crop)</b>						
China	707,427	720,971	729,927	696,600	705,000	680,000
European Union	257,600	257,000	261,750	266,500	263,000	263,000
Russia	34,500	36,000	37,000	39,760	39,750	41,000
Brazil	37,700	37,900	38,470	39,050	39,635	39,635
Canada	28,347	27,376	27,078	28,630	28,000	29,100
Mexico	17,150	17,800	17,600	18,000	19,000	19,200
Korea, South	16,340	16,953	16,812	17,600	17,350	17,995
Japan	17,250	17,350	17,050	17,150	17,200	17,200
Ukraine	8,538	9,465	9,527	9,200	9,000	8,900
Belarus	5,775	5,325	4,850	5,200	5,250	5,300
Others	4,581	4,737	4,985	4,850	4,850	5,250
<b>Total Foreign</b>	1,135,208	1,150,877	1,165,049	1,142,540	1,148,035	1,126,580
<b>United States</b>	116,655	115,135	114,856	120,834	122,975	121,437
<b>Total</b>	1,251,863	1,266,012	1,279,905	1,263,374	1,271,010	1,248,017

Note: The notation of a month beneath a year conveys the month in which the forecast for that year was released.

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

	2012	2013	2014	2015	2016 Oct	2016 Apr
<b>Total Imports</b>						
Mexico	31	10	14	42	50	25
Ukraine	225	231	22	22	30	24
Belarus	1	3	5	8	3	8
Canada	2	1	3	6	5	5
China	20	24	7	4	2	5
European Union	2	1	1	3	2	2
Korea, South	11	2	2	2	2	2
Russia	340	86	8	2	1	2
Japan	1	1	1	1	0	1
Australia	0	0	0	0	0	0
Others	1	1	0	0	0	0
<b>Total Foreign</b>	634	360	63	90	95	74
<b>United States</b>	5,656	4,948	4,947	5,741	5,000	6,100
<b>Total</b>	6,290	5,308	5,010	5,831	5,095	6,174
<b>Total Exports</b>						
Canada	5,676	4,784	4,960	5,773	5,050	6,100
China	1,643	1,684	1,750	1,696	1,600	1,500
European Union	741	569	568	436	600	500
Brazil	2	4	3	3	2	2
Belarus	103	52	0	1	0	1
Australia	0	0	0	0	0	0
Japan	0	0	0	0	0	0
Korea, South	0	0	0	0	0	0
Mexico	0	0	0	0	0	0
Russia	0	0	0	2	0	0
Others	1	0	1	1	0	0
<b>Total Foreign</b>	8,166	7,093	7,282	7,912	7,252	8,103
<b>United States</b>	56	34	19	41	48	32
<b>Total</b>	8,222	7,127	7,301	7,953	7,300	8,135

Note: The notation of a month beneath a year conveys the month in which the forecast for that year was released.

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

	2012	2013	2014	2015	2016 Oct	2016 Apr
<b>Production</b>						
Brazil	12,645	12,308	12,692	13,146	13,480	13,565
China	13,700	13,350	13,000	13,400	13,100	12,700
European Union	9,565	9,910	10,280	10,620	10,845	10,760
India	3,160	3,450	3,725	3,900	4,200	4,200
Russia	2,830	3,010	3,260	3,550	3,650	3,700
Mexico	2,958	2,907	3,025	3,196	3,160	3,300
Argentina	2,014	2,060	2,050	2,080	2,100	2,200
Turkey	1,723	1,758	1,894	1,900	1,990	2,050
Thailand	1,550	1,500	1,570	1,690	1,650	1,720
Indonesia	1,540	1,550	1,565	1,625	1,640	1,640
Others	15,228	15,809	16,333	15,634	15,156	15,377
<b>Total Foreign</b>	66,913	67,612	69,394	70,741	70,971	71,212
<b>United States</b>	16,621	16,976	17,306	17,971	18,365	18,443
<b>Total</b>	83,534	84,588	86,700	88,712	89,336	89,655
<b>Total Dom. Consumption</b>						
China	13,543	13,174	12,830	13,267	12,985	12,685
European Union	9,198	9,498	9,859	10,171	10,375	10,305
Brazil	9,139	8,829	9,137	9,309	9,604	9,477
India	3,156	3,445	3,716	3,892	4,193	4,193
Mexico	3,568	3,582	3,738	3,981	3,922	4,095
Russia	3,356	3,497	3,675	3,728	3,735	3,775
Japan	2,214	2,209	2,226	2,298	2,250	2,298
Argentina	1,723	1,729	1,773	1,894	1,876	1,976
South Africa	1,582	1,556	1,572	1,660	1,665	1,720
Turkey	1,439	1,421	1,515	1,579	1,630	1,710
Others	19,628	20,426	21,058	20,096	19,908	19,945
<b>Total Foreign</b>	68,546	69,366	71,099	71,875	72,143	72,179
<b>United States</b>	13,346	13,691	14,041	15,095	15,233	15,518
<b>Total</b>	81,892	83,057	85,140	86,970	87,376	87,697

Notes: Chicken paws are excluded. From 2015, the following countries are excluded: Bahrain, Georgia, Iran, Jamaica and Moldova. From 2016, Venezuela is excluded. The notation of a month beneath a year conveys the month in which the forecast for that year was released.

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

	2012	2013	2014	2015	2016 Oct	2016 Apr
<b>Total Imports</b>						
Japan	877	854	888	936	875	910
Saudi Arabia	750	838	775	930	850	900
Mexico	616	682	722	790	770	800
European Union	727	671	712	728	720	725
Iraq	610	673	730	640	710	670
South Africa	371	355	369	436	440	470
China	254	244	260	268	260	360
United Arab Emirates	223	217	192	262	220	320
Hong Kong	300	272	299	312	380	305
Cuba	196	182	186	224	235	250
Others	3,566	3,641	3,754	3,083	3,180	2,968
<b>Total Foreign</b>	<b>8,490</b>	<b>8,629</b>	<b>8,887</b>	<b>8,609</b>	<b>8,640</b>	<b>8,678</b>
<b>United States</b>	<b>51</b>	<b>55</b>	<b>53</b>	<b>59</b>	<b>53</b>	<b>56</b>
<b>Total</b>	<b>8,541</b>	<b>8,684</b>	<b>8,940</b>	<b>8,668</b>	<b>8,693</b>	<b>8,734</b>
<b>Total Exports</b>						
Brazil	3,508	3,482	3,558	3,841	3,880	4,090
European Union	1,094	1,083	1,133	1,177	1,190	1,180
Thailand	538	504	546	622	570	630
China	411	420	430	401	375	375
Turkey	284	337	379	321	360	340
Argentina	295	334	278	187	225	225
Ukraine	75	141	167	159	190	165
Canada	141	150	137	133	140	150
Chile	93	88	87	99	100	105
Belarus	105	105	113	135	100	100
Others	245	298	340	332	337	338
<b>Total Foreign</b>	<b>6,789</b>	<b>6,942</b>	<b>7,168</b>	<b>7,407</b>	<b>7,467</b>	<b>7,698</b>
<b>United States</b>	<b>3,299</b>	<b>3,332</b>	<b>3,312</b>	<b>2,866</b>	<b>3,221</b>	<b>3,057</b>
<b>Total</b>	<b>10,088</b>	<b>10,274</b>	<b>10,480</b>	<b>10,273</b>	<b>10,688</b>	<b>10,755</b>

Notes: Chicken paws are excluded. From 2015, the following countries are excluded: Bahrain, Georgia, Iran, Jamaica and Moldova. From 2016, Venezuela is excluded. The notation of a month beneath a year conveys the month in which the forecast for that year was released.

## 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, and broiler meat trade.

### PSDs Excluded Beginning in Year 2015:

- Cattle: Colombia and Venezuela.
- Beef: Albania, Azerbaijan, Cote d'Ivoire, Georgia, Ghana, Jamaica, Senegal, and Uzbekistan.
- Pork: Albania, Armenia, Congo (Brazzaville), Gabon, Georgia, Ghana, Jamaica, North Korea, Kyrgyzstan, Moldova, Switzerland, and Trinidad and Tobago.
- Broiler Meat: Bahrain, Georgia, Iran, Jamaica, and Moldova.

### PSDs Excluded Beginning in Year 2016:

- Pork: Venezuela.
- Broiler Meat: Venezuela.

### Data Modifications in PSDs for Year Prior to 2014:

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

- The cattle PSD for the following country is revised for the 2012-2013 period on additional and/or revised official production data available: Australia.
- The beef PSDs for the following countries are revised for particular years during the 2006-2013 period on additional and/or revised official production and/or stocks data available: Angola, China, Honduras, Nicaragua, Oman, and Ukraine.
- The beef PSDs for the following countries are revised for particular years during the 2006-2013 period on additional and/or revised official trade data available: China, Costa Rica, El Salvador, European Union, Gabon, Israel, Malaysia, South Africa, and Venezuela.

#### **Swine/Pork:**

- The swine PSDs for the following countries are revised for 2013 on additional and/or revised official production and/or stocks data available: Australia, Brazil, China, European Union, Japan, and Ukraine.
- The pork PSDs for the following countries are revised for particular years during the 1999-2013 period due to additional and/or revised official production and/or stocks data: Australia, China, European Union, Japan, South Korea, and Ukraine.
- The pork PSDs for the following countries are revised for particular years during the 2011-2013 period due to additional and/or revised official trade data: Angola, Bahamas, Bosnia and Herzegovina, Brazil, China, European Union, Kazakhstan, Montenegro, Philippines, Serbia, South Africa, and Ukraine.

#### **Broiler Meat:**

- The broiler meat PSDs for the following countries are revised for particular years during the 2006-2013 period on additional and/or revised official production and/or stocks data available: Philippines and Turkey.
- The broiler meat PSDs for the following countries are revised for particular years during the 2008-2013 period on additional and/or revised official trade data available: Gabon and Russia.

### Assumptions

- **Diseases:** Forecast reflects disease (avian influenza, bovine spongiform encephalopathy, etc.) policies and restrictions in place as of April 12, 2016 and assumes their continuation.



## Conversion Rates

	<b>Beef &amp; Veal</b>	<b>Pork</b>
<b>Conversion Rate</b>	1.40	1.30
<b>HS Codes</b>	Fresh/Chilled: 0201 Frozen: 0202 Processed: 021020 & 160250	Fresh/Chilled: 020311, 020312, 020319 Frozen: 020321, 020322, 020329 Processed: 021011, 021012, 021019, 160241, 160242, 160249
	<b>Broiler Meat</b>	<b>Turkey Meat</b>
<b>Conversion Rate</b>	1	1
<b>HS Codes</b>	Fresh/Chilled: 0207.11, 0207.13 Frozen: 0207.12, 0207.14 Processed: 1602.32	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. Also, beef and veal estimates include meat of other bovines for certain countries. In particular, Indian estimates include carabeef (water buffalo).

## 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.

**RTC (Ready-to-Cook):** The weight of poultry certified wholesome by inspection after post-mortem condemnation pounds are removed. Ready-to-cook represents poultry meat ready for the marketing channel.

## FAS Reports from Overseas Offices

The *Livestock and Poultry: World Markets and Trade* circular is based on post reports submitted since January 2016 and on available secondary information. The individual country reports can be obtained on FAS Online at: <http://gain.fas.usda.gov/Pages/Default.aspx>.

## PSD Online

The entire USDA PSD database is available online at: <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/commodities/livestock-and-meats> 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/ldpm-livestock,-dairy,-and-poultry-outlook/>.

## Future Releases and Contact Information

Please visit <http://www.fas.usda.gov/data/livestock-and-poultry-world-markets-and-trade> to view archived and future releases. The next release of this circular will be in October 2016.

To receive the circular via email, go to: <https://public.govdelivery.com/accounts/USDAFAS/subscriber/new>.

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