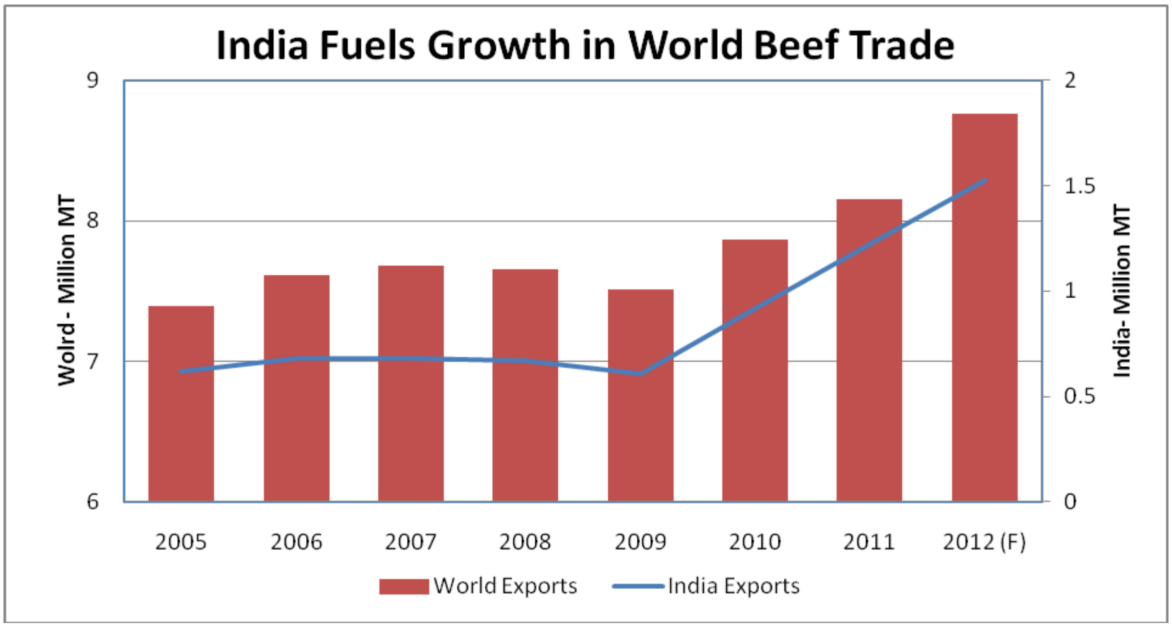
USDA United States Department of Agriculture

Foreign Agricultural Service

April 2012

Livestock and Poultry: World Markets and Trade

World Beef Exports: India Takes Lead in 2012



India is forecast to become the world's leading beef exporter in 2012 due to an expanding dairy herd, efficiency improvements, increased slaughter and price-competitiveness in the international market particularly vis-à-vis Brazil.

India's exports are exclusively deboned frozen buffalo meat (carabeef) which is included in USDA's global estimates of beef (bovine) meat production. According to the most recent Indian Livestock Census (2007), buffalo comprise approximately one-third of the bovine herd. Buffalo are preferred to cattle due to their adaptability to climatic conditions and high milk fat content as dairy production fuels the bovine sector. Federal law prohibits the slaughter of all cattle (male and female) as well as productive (in milk) bovines (cattle and buffalo). Thus beef/carabeef production is driven by buffalo slaughter which is allowed, albeit restricted to males and unproductive females.

Export sales have made significant inroads in the Middle East, North Africa and Southeast Asia (key Brazilian markets) as all carabeef is lower priced and produced according to halal standards. Further, carabeef is lean, with positive blending characteristics important to processors. In 2012, additional export orientated slaughterhouses are expected to come on line, increasing supplies.

Production gains are largely destined for the export market. Domestic demand is constrained by cold-chain facilities and consumer preference for non-bovine proteins such as poultry products, dairy products and pulses therefore merely keeping pace with population growth.

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

	2007	2008	2009	2010	2011 (p)	2012 (f)	Percent Change 2011 to 2012
Production							
Beef and Veal /1	58,438	58,382	57,182	57,117	56,888	57,001	0.2%
Pork /1	94,103	97,826	100,547	102,902	101,662	104,357	2.7%
Broiler and Turkey /2	74,646	78,200	78,585	82,940	85,732	87,497	2.1%
Total	227,187	234,408	236,314	242,959	244,282	248,855	1.9%
Consumption							
Beef and Veal /1	57,885	57,705	56,451	56,217	55,698	55,620	-0.1%
Pork /1	93,921	97,934	100,398	102,684	101,286	103,780	2.5%
Broiler & Turkey /2	74,299	77,251	77,977	81,844	84,641	86,361	2.0%
Total	226,105	232,890	234,826	240,745	241,625	245,761	1.7%
Imports							
Beef and Veal /1	7,199	7,008	6,841	6,915	6,990	7,350	5.2%
Pork /1	5,080	6,241	5,525	5,863	6,595	6,446	-2.3%
Broiler and Turkey /2	7,547	8,265	8,016	8,383	8,878	9,134	2.9%
Total	19,826	21,514	20,382	21,161	22,463	22,930	2.1%
Exports							
Beef and Veal /1	7,679	7,651	7,509	7,866	8,155	8,728	7.0%
Pork /1	5,186	6,195	5,673	6,077	6,982	6,985	0.0%
Broiler and Turkey /2	7,952	9,072	8,809	9,429	9,978	10,242	2.6%
Total	20,817	22,918	21,991	23,372	25,115	25,955	3.3%
U.S. Exports							
Beef and Veal /1	650	905	878	1,043	1,265	1,236	-2.3%
Pork /1	1,425	2,110	1,857	1,916	2,356	2,404	2.0%
Broiler and Turkey /2	2,926	3,463	3,335	3,333	3,466	3,445	-0.6%
Total	5,001	6,478	6,070	6,292	7,087	7,085	0.0%
U.S. Market Share (%) of Exports Among Major Traders							
Beef and Veal /1	8%	12%	12%	13%	16%	14%	
Pork /1	27%	34%	33%	32%	34%	34%	
Broiler and Turkey /2	37%	38%	38%	35%	35%	34%	
Combined	24%	28%	28%	27%	28%	27%	

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

forecast

1/ 1,000 Metric Tons (Carcass Weight Equivalent)

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

Note to Readers: Totals include only those countries that make up USDA's official PSD database are reported. This means totals do not encompass all production, consumption, and trade, but rather the sum of those countries reported in USDA's database, which represent the most important players in the world meat PSD situation. In an attempt to capture these major players, the list of countries reported changes periodically.

BEEF AND VEAL: 2012 REVISED FROM OCTOBER

Global beef production in 2012 is virtually unchanged from the last forecast at 57.0 million tons. The export forecast is revised 497,000 tons higher to a record 8.7 million tons fueled by India, Columbia, Australia and New Zealand coupled with historical revisions to Belarus and Pakistan which resulted in an increased forecast. Imports by Venezuela, Russia and the United States are raised on stronger demand that is unmet by domestic supplies. U.S. beef production is lowered slightly; exports remain virtually unchanged.

There have been historical revisions to the supply-demand balances for several countries on the basis of new data and are detailed in the *Notes to Readers*.

World Production Virtually Unchanged as Only India Achieves Significant Gains

India is forecast significantly higher (220,000 tons) to 3.5 million tons based on an expanding dairy herd, increased slaughter and price-competitiveness in the global meat market particularly vis-à-vis Brazil. As exports account for 44 percent of production, growth in exports underpins production increases.

Australia's production is increased slightly to 2.2 million tons on improved pasture conditions and fodders supplies resulting in historically high carcass weights. **New Zealand** is also revised higher to 652,000 tons as improved pasture conditions late last year delayed some slaughter until 2012 and boosted carcass weights.

South Korea is revised upward to 340,000 tons on higher slaughter reflecting large inventories, low cattle prices, elevated feed costs and the government's plan to slaughter lower-performing cows.

The **United States** is forecast slightly higher to 11.5 million tons as cattle placed on feed in late 2011 due to drought are marketed in early 2012. Both the 2011 and 2012 calf crops are revised lower; the 2011 calf crop is the smallest since 1950.

Russia is lowered 45,000 tons to 1.3 million tons as profitability in the dairy industry, of which beef is a byproduct, encourages producers to hold back cows and heifers.

Egypt's recent outbreak of foot and mouth disease (FMD) results in a downward revision to 280,000 tons.

Venezuela is revised lower to 285,000 tons offset by increased imports to fulfill demand.

World's Largest Beef Exporter: India

India's exports are revised 250,000 tons higher to 1.5 million tons making it the world's leader. Expanding demand from price sensitive importers, primarily in Southeast Asia, the Middle East and Africa have bolstered an increase in the number of export orientated slaughterhouses. India's FMD status remains a significant hurdle to expanding their market access.

Increased production in **Australia** and **New Zealand** will boost supplies and exports are raised to 1.4 million tons and 544,000 tons, respectively. Strong U.S. demand, particularly for manufacturing beef, will outweigh the higher Australian dollar and support higher exports to the United States.

Columbia's renewal of trade relations with Venezuela will enable their exports to rebound to 100,000 tons and will also bolster live cattle shipments.

Brazil's exports are revised marginally lower to nearly 1.4 million tons as the decline in Iranian demand will only be partially offset by gains in alternative markets such as Egypt and Venezuela.

EU exports are lowered by 20,000 tons to 445,000 tons as Turkey, a key market, adjusted import tariffs to support more live cattle imports instead of beef.

World Imports Bolstered by Rising Demand

U.S. imports are raised by 166,000 tons to 1.1 million tons as tight domestic supplies, strong demand and ample Oceania supplies offset a weak dollar.

Russia's forecast is revised up by 85,000 tons to over 1.1 million tons due to lower production and new market access conditions upon WTO accession. Revisions to historical trade estimates for Belarus generate an increase in the forecast for Russian imports.

Venezuela's renewal of trade relations with Columbia will facilitate higher imports which are forecast to rise to 325,000 tons from October, up 125,000 tons. Supplies will also come from Brazil, and live cattle (for slaughter in Venezuela) will be sourced from both Columbia and Brazil.

As a result of increased domestic supplies, **South Korea**'s imports are down by 30,000 tons to 390,000 tons. U.S. shipments are expected to remain steady as a result of a weak dollar.

Taiwan's increased ractopamine residue testing on imported beef will adversely impact imports which are dropped 25,000 tons to 100,000 tons.

PORK: 2012 REVISED FROM OCTOBER

Global pork production in 2012 is revised upward 924,000 tons from the last forecast to 104.4 million tons. China, the EU, and the United States account for most of the growth. Exports are raised 440,000 tons to 7.0 million tons with more demand from virtually all major importing countries. U.S. production and exports are forecast higher, while imports are lowered slightly.

There have been historical revisions to the supply-demand balances for several countries on the basis of new data and are detailed in the *Notes to Readers*.

World Production Raised for Nearly All Major Producers

China is forecast up 320,000 tons to 51.6 million tons as rising producer returns stimulated the use of higher quality feeds. Government supports also encourage expansion and improved swine genetics. Disease outbreaks are reportedly milder and less prevalent because of favorable weather and vaccination efforts.

EU is raised 135,000 tons to 22.6 million tons on higher than expected swine breeding efficiency, likely caused by industry restructuring.

The **United States** is forecast up 96,000 tons to 10.6 million tons on increased sow productivity and slightly heavier weights.

Russia is raised 80,000 tons to 2.1 million tons on expansion of modern, large-scale swine operations aided by government support. This growth outweighs lower production by small operations and private households.

Greater volumes are expected from **Mexico**, up 35,000 tons to 1.2 million tons, due to heavier slaughter weights brought about by improved production practices and growth from the export segment of the industry.

South Korea is down 28,000 tons to 982,000 tons as herd re-building, following the foot and mouth disease (FMD) outbreak, is slowed by tight supplies of sows and lower breeding productivity.

World Imports Raised, Led by Russia and East Asia

Russia is up 200,000 tons to 900,000 tons reflecting greater access to more competitively priced foreign supplies under the new tariff-rate-quotas (TRQs) and less restrictive sanitary commitments mandated by WTO Accession.

China is raised 90,000 tons to 650,000 tons on strong demand unmet by domestic production.

South Korea is forecast 50,000 tons higher at 550,000 tons given slower than expected domestic production recovery. Also, the implementation of free trade agreements with the EU and the United States makes imports more competitive with domestic supplies.

Japan is raised 40,000 tons to 1.3 million tons on stronger demand from the processing sector.

Canada is raised 25,000 tons to 215,000 tons as the relatively weak dollar makes U.S. pork more competitive.

United States imports are lowered marginally to 365,000 tons.

World Exports Higher, Led by the United States and the EU

EU is revised up 250,000 tons to 2.1 million because of greater access to the Russian market following their WTO Accession. Higher volumes are expected to East Asia as a weaker Euro and Danish Kroner vis-à-vis Brazil and Canada give the EU a comparative advantage.

The **United States** is forecast 95,000 tons higher to 2.4 million tons on expanding East Asian and North American demand supported by a relatively weak dollar and more competitive prices.

Brazil is raised 45,000 tons to 615,000 tons due to larger shipments to Hong Kong, Ukraine, and new market access to China and the United States.

BROILER MEAT: 2012 REVISED FROM OCTOBER

Global broiler meat production is revised downward 881,000 tons from the last forecast to 82.2 million tons as a consequence of higher feed and operating costs. World exports are virtually unchanged as an increase in the United States offsets a decrease in Brazil. U.S. production is revised downward, while exports are up.

There have been historical revisions to the supply-demand balances for several countries on the basis of new data and are detailed in the *Notes to Readers*.

World Production Expands Despite Challenges

India is revised higher 450,000 tons to a record 3.2 million tons. Greater vertical integration and robust demand fueled by an expanding middle-class and changing tastes and preferences support increasing production.

Argentina is revised upward 75,000 tons to a record 1.9 million tons on stronger domestic and foreign demand, despite termination of government feed subsidies.

Brazil is revised downward 352,000 tons to 13.3 million tons as a result of higher feed costs and falling demand due to an overvalued currency and sanitary restrictions by trading partners.

The **United States** is revised lower by 202,000 tons to 16.4 million tons as relatively higher feed costs will dampen expansion despite rising broiler meat prices.

China is revised downward to 13.7 million tons. Greater pork supplies and competitive prices are generating cutbacks in poultry production due to concerns of oversupply and weakening prices.

EU is virtually unchanged at 9.6 million tons as higher feed costs and regional economic uncertainty continue to discourage expansion.

World Exports Virtually Unchanged as United States Increase Offsets Brazil Decline

The **United States** is revised upward 125,000 tons to nearly 3.2 million tons. Global economic growth and a relatively weak dollar is expected to support increases in exports to a wide number of countries. The upward revision in the Russian TRQ quantity compared to the October forecast also supports greater exports.

Brazil is revised lower 150,000 tons to 3.3 million tons based on less competitive prices resulting from an appreciating currency. Russian delisting of eligible plants and South African anti-dumping duties also continue to depress shipments.

Turkey is revised higher 37,000 tons to 230,000 tons due to mounting demand from the Middle East.

Beef and Veal Selected Countries Summary

1,000 Metric Tons (Carcass Weight Equivalent)

	2008	2009	2010	2011	2012 Oct	2012 Apr
Production						
Brazil	9,024	8,935	9,115	9,030	9,210	9,210
EU-27	8,090	7,913	8,048	8,030	8,000	7,995
China	6,132	5,764	5,600	5,550	5,520	5,544
India	2,552	2,514	2,842	3,170	3,285	3,505
Argentina	3,150	3,380	2,620	2,530	2,600	2,600
Australia	2,159	2,129	2,087	2,150	2,180	2,200
Mexico	1,667	1,700	1,751	1,825	1,845	1,830
Pakistan	1,388	1,441	1,470	1,435	1,400	1,400
Russia	1,490	1,460	1,435	1,360	1,385	1,340
Canada	1,289	1,252	1,272	1,170	1,200	1,200
Others	9,278	8,803	8,830	8,641	8,710	8,708
Total Foreign	46,219	45,291	45,070	44,891	45,335	45,532
United States	12,163	11,891	12,047	11,997	11,463	11,469
Total	58,382	57,182	57,117	56,888	56,798	57,001
Total Dom. Consumption						
Brazil	7,252	7,374	7,592	7,730	7,885	7,920
EU-27	8,352	8,262	8,147	7,948	7,910	7,910
China	6,080	5,749	5,589	5,523	5,500	5,513
Russia	2,707	2,505	2,505	2,486	2,441	2,481
Argentina	2,731	2,727	2,325	2,279	2,302	2,322
India	1,880	1,905	1,925	1,950	2,010	1,980
Mexico	2,033	1,971	1,944	1,942	1,880	1,880
Pakistan	1,371	1,414	1,436	1,397	1,404	1,357
Japan	1,173	1,211	1,225	1,238	1,233	1,256
Canada	1,036	1,016	999	1,021	1,020	1,030
Others	10,687	10,078	10,491	10,526	10,906	10,598
Total Foreign	45,302	44,212	44,178	44,040	44,491	44,247
United States	12,403	12,239	12,039	11,658	11,158	11,359
Total	57,705	56,451	56,217	55,698	55,649	55,606

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.

Beef and Veal Selected Countries Summary

1,000 Metric Tons (Carcass Weight Equivalent)

	2008	2009	2010	2011	2012 Oct	2012 Apr
Total Imports						
Russia	1,228	1,053	1,075	1,130	1,060	1,145
Japan	659	697	721	745	725	756
Vietnam	200	270	223	350	325	400
Korea, South	295	315	366	431	420	390
EU-27	466	497	437	366	375	360
Venezuela	320	250	143	200	200	325
Mexico	408	322	296	265	270	300
Canada	230	247	243	282	270	280
Egypt	166	180	260	217	250	230
Saudi Arabia	112	119	158	180	165	195
Others	1,773	1,700	1,951	1,891	2,092	1,855
Total Foreign	5,857	5,650	5,873	6,057	6,152	6,236
United States	1,151	1,191	1,042	933	948	1,114
Total	7,008	6,841	6,915	6,990	7,100	7,350
Total Exports						
India	672	609	917	1,220	1,275	1,525
Australia	1,407	1,364	1,368	1,410	1,380	1,425
Brazil	1,801	1,596	1,558	1,340	1,375	1,350
New Zealand	533	514	530	503	504	544
Canada	494	480	523	426	450	450
EU-27	204	148	338	448	465	445
Uruguay	361	376	347	305	320	315
Argentina	423	655	298	254	300	280
Mexico	42	51	103	148	235	250
Belarus	91	158	181	210	135	220
Others	718	680	660	626	542	688
Total Foreign	6,746	6,631	6,823	6,890	6,981	7,492
United States	905	878	1,043	1,265	1,250	1,236
Total	7,651	7,509	7,866	8,155	8,231	8,728

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.

Pork Selected Countries Summary

1,000 Metric Tons (Carcass Weight Equivalent)

	2008	2009	2010	2011	2012 Oct	2012 Apr
Production						
China	46,205	48,905	51,070	49,500	51,280	51,600
EU-27	22,596	22,434	22,571	22,750	22,480	22,615
Brazil	3,015	3,130	3,195	3,227	3,295	3,311
Russia	1,736	1,844	1,920	1,995	2,020	2,100
Vietnam	1,850	1,910	1,930	1,960	1,960	2,000
Canada	1,786	1,789	1,772	1,770	1,765	1,775
Japan	1,249	1,310	1,292	1,267	1,280	1,275
Philippines	1,225	1,240	1,255	1,260	1,265	1,265
Mexico	1,161	1,162	1,165	1,182	1,180	1,215
Korea, South	1,056	1,062	1,110	837	1,010	982
Others	5,348	5,319	5,436	5,582	5,432	5,657
Total Foreign	87,227	90,105	92,716	91,330	92,967	93,795
United States	10,599	10,442	10,186	10,332	10,466	10,562
Total	97,826	100,547	102,902	101,662	103,433	104,357
Total Dom. Consumption						
China	46,691	48,823	51,157	50,004	51,560	51,995
EU-27	21,024	21,058	20,841	20,564	20,595	20,505
Russia	2,842	2,719	2,835	2,940	2,719	2,999
Brazil	2,390	2,423	2,577	2,644	2,726	2,697
Japan	2,486	2,467	2,488	2,522	2,489	2,528
Vietnam	1,880	1,936	1,940	1,995	1,990	2,035
Mexico	1,605	1,770	1,774	1,690	1,755	1,775
Korea, South	1,519	1,480	1,539	1,487	1,510	1,530
Philippines	1,270	1,298	1,358	1,358	1,354	1,364
Taiwan	897	925	901	894	846	921
Others	6,517	6,486	6,621	6,849	6,828	6,950
Total Foreign	89,121	91,385	94,031	92,947	94,372	95,299
United States	8,813	9,013	8,653	8,339	8,526	8,481
Total	97,934	100,398	102,684	101,286	102,898	103,780

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

Pork Selected Countries Summary

1,000 Metric Tons (Carcass Weight Equivalent)

	2008	2009	2010	2011	2012 Oct	2012 Apr
Total Imports						
Japan	1,267	1,138	1,198	1,254	1,210	1,250
Russia	1,106	876	916	946	700	900
China	709	270	415	758	560	650
Mexico	535	678	687	594	650	650
Korea, South	430	390	382	640	500	550
Hong Kong	346	369	347	432	380	400
Canada	194	180	183	204	190	215
Australia	152	176	183	175	180	185
Belarus	66	30	95	125	130	125
Ukraine	238	186	146	119	100	120
Others	821	854	921	984	1,044	1,036
Total Foreign	5,864	5,147	5,473	6,231	5,644	6,081
United States	377	378	390	364	374	365
Total	6,241	5,525	5,863	6,595	6,018	6,446
Total Exports						
EU-27	1,727	1,415	1,755	2,204	1,900	2,125
Canada	1,129	1,123	1,159	1,197	1,160	1,175
Brazil	625	707	619	584	570	615
China	223	232	278	244	280	255
Chile	142	152	130	139	145	145
Mexico	91	70	78	86	75	90
Belarus	54	31	62	78	20	80
Australia	48	40	41	41	42	42
Ukraine	0	0	1	17	13	15
Vietnam	11	13	14	8	10	10
Others	35	33	24	28	21	29
Total Foreign	4,085	3,816	4,161	4,626	4,236	4,581
United States	2,110	1,857	1,916	2,356	2,309	2,404
Total	6,195	5,673	6,077	6,982	6,545	6,985

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

Broiler Meat Selected Countries Summary

1,000 Metric Tons (Ready to Cook Equivalent)

	2008	2009	2010	2011	2012 Oct	2012 Apr
Production						
China	11,840	12,100	12,550	13,200	13,800	13,730
Brazil	11,033	11,023	12,312	12,863	13,602	13,250
EU-27	8,594	8,756	9,202	9,420	9,630	9,600
India	2,490	2,550	2,650	2,900	2,750	3,200
Mexico	2,853	2,781	2,822	2,900	2,892	2,925
Russia	1,680	2,060	2,310	2,575	2,750	2,725
Argentina	1,435	1,500	1,680	1,770	1,775	1,850
Turkey	1,170	1,250	1,430	1,614	1,650	1,687
Indonesia	1,350	1,409	1,465	1,515	1,540	1,540
Thailand	1,170	1,200	1,280	1,350	1,420	1,420
Others	12,687	13,003	13,465	13,619	14,662	13,865
Total Foreign	56,302	57,632	61,166	63,726	66,471	65,792
United States	16,561	15,935	16,563	16,694	16,603	16,401
Total	72,863	73,567	77,729	80,420	83,074	82,193
Total Dom. Consumption						
China	11,954	12,210	12,457	13,015	13,605	13,518
Brazil	7,792	8,032	9,132	9,645	10,138	9,936
EU-27	8,579	8,710	8,954	9,102	9,220	9,280
Mexico	3,281	3,264	3,364	3,470	3,494	3,546
India	2,489	2,549	2,648	2,890	2,745	3,190
Russia	2,841	2,982	2,961	3,040	3,099	3,185
Japan	1,926	1,978	2,075	2,087	2,065	2,115
South Africa	1,428	1,443	1,524	1,633	1,630	1,632
Argentina	1,275	1,327	1,475	1,570	1,560	1,610
Indonesia	1,355	1,412	1,465	1,515	1,540	1,540
Others	15,796	16,219	17,304	17,969	19,051	18,461
Total Foreign	58,716	60,126	63,359	65,936	68,147	68,013
United States	13,435	12,946	13,470	13,655	13,606	13,269
Total	72,151	73,072	76,829	79,591	81,753	81,282

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

Notes: 1/ Chicken paws are excluded.

Broiler Meat Selected Countries Summary

1,000 Metric Tons (Ready to Cook Equivalent)

	2008	2009	2010	2011	2012 Oct	2012 Apr
Total Imports						
Japan	737	645	789	895	805	840
Saudi Arabia	510	605	681	788	880	832
EU-27	712	719	681	718	710	740
Mexico	433	492	549	578	625	630
Russia	1,166	929	656	500	354	510
Iraq	227	397	337	419	290	440
Hong Kong	236	253	295	410	260	430
Vietnam	211	201	291	317	350	350
United Arab Emirates	289	297	289	314	360	342
Angola	171	161	239	288	245	300
Others	3,049	2,905	3,170	3,237	3,380	3,297
Total Foreign	7,741	7,604	7,977	8,464	8,259	8,711
United States	43	45	48	49	47	47
Total	7,784	7,649	8,025	8,513	8,306	8,758
Total Exports						
Brazil	3,242	2,992	3,181	3,219	3,465	3,315
EU-27	727	765	929	1,036	1,120	1,060
Thailand	383	379	432	467	500	500
China	285	291	379	423	445	445
Argentina	164	178	214	210	225	250
Turkey	42	86	110	206	193	230
Canada	152	147	147	155	155	155
Chile	63	87	79	90	117	100
Belarus	7	21	38	70	15	80
Kuwait	70	70	71	70	70	70
Others	125	163	199	250	252	274
Total Foreign	5,260	5,179	5,779	6,196	6,557	6,479
United States	3,157	3,093	3,069	3,171	3,039	3,164
Total	8,417	8,272	8,848	9,367	9,596	9,643

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

Notes: 1/ Chicken paws are excluded.

Turkey Meat Selected Countries Summary

1,000 Metric Tons (Ready to Cook Equivalent)

	2007	2008	2009	2010	2011	2012 Oct
Production						
EU-27	1,790	1,830	1,795	1,946	1,940	1,910
Brazil	458	465	466	485	505	531
Canada	170	180	167	159	160	162
Russia	30	39	31	70	90	110
Mexico	15	15	11	11	10	10
South Africa	7	7	8	8	8	8
China	5	5	5	6	6	6
Others	4	nr	nr	nr	nr	nr
Total Foreign	2,479	2,541	2,483	2,685	2,719	2,737
United States	2,664	2,796	2,535	2,526	2,593	2,567
Total	5,143	5,337	5,018	5,211	5,312	5,304
Total Dom. Consumption						
EU-27	1,769	1,835	1,801	1,911	1,880	1,850
Brazil	281	261	302	327	365	389
Mexico	211	212	155	163	169	173
Canada	150	163	151	143	145	145
Russia	105	107	72	105	123	140
China	35	50	32	32	41	51
South Africa	47	38	34	34	37	38
Others	23	nr	nr	nr	nr	nr
Total Foreign	2,621	2,666	2,547	2,715	2,760	2,786
United States	2,404	2,434	2,363	2,305	2,297	2,298
Total	5,025	5,100	4,910	5,020	5,057	5,084

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

Notes: 1/ From 2008, Taiwan is excluded.
2/ 'nr' = 'no data'.

Turkey Meat Selected Countries Summary

1,000 Metric Tons (Ready to Cook Equivalent)

	2007	2008	2009	2010	2011	2012 Oct
Total Imports						
Mexico	196	197	144	153	160	164
EU-27	103	125	112	99	90	90
China	30	45	27	26	35	45
Russia	75	68	41	35	33	30
South Africa	40	31	26	26	29	30
Canada	9	9	8	8	8	8
Brazil	0	0	0	0	0	0
Others	19	nr	nr	nr	nr	nr
Total Foreign	472	475	358	347	355	367
United States	7	6	9	11	10	9
Total	479	481	367	358	365	376
Total Exports						
EU-27	124	120	106	134	150	150
Brazil	177	204	164	158	140	142
Canada	27	25	25	24	25	25
Mexico	0	0	0	1	1	1
China	0	0	0	0	0	0
Russia	0	0	0	0	0	0
South Africa	0	0	0	0	0	0
Others	0	nr	nr	nr	nr	nr
Total Foreign	328	349	295	317	316	318
United States	248	306	242	264	295	281
Total	576	655	537	581	611	599

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

Notes: 1/ From 2008, Taiwan is excluded.

Cattle Selected Countries Summary

(in 1,000 head)

	2008	2009	2010	2011	2012 Oct	2012 Apr
Total Cattle Beg. Stks						
India	304,418	309,900	316,400	320,800	324,300	324,490
Brazil	175,437	179,540	185,159	190,925	197,280	197,550
China	105,948	105,722	105,430	104,814	103,944	104,323
EU-27	89,043	88,837	88,300	87,437	85,750	86,500
Argentina	55,662	54,260	49,057	48,156	48,856	49,297
Colombia	30,095	30,775	30,845	30,971	30,896	30,910
Australia	28,040	27,321	27,907	26,600	27,500	28,800
Mexico	22,850	22,666	22,192	21,456	20,075	20,090
Russia	21,546	21,040	20,677	19,970	19,600	19,575
Canada	13,870	13,195	12,905	12,457	12,615	12,515
Others	86,116	75,989	57,478	56,204	55,453	56,032
Total Foreign	933,025	929,245	916,350	919,790	926,269	930,082
United States	96,035	94,521	93,881	92,682	91,450	90,769
Total	1,029,060	1,023,766	1,010,231	1,012,472	1,017,719	1,020,851
Production (Calf Crop)						
India	60,500	61,000	61,700	62,500	63,200	63,400
Brazil	49,050	49,150	49,200	49,445	50,500	49,690
China	45,360	42,576	41,500	40,900	40,600	40,950
EU-27	30,850	30,100	30,000	29,750	29,350	29,600
Argentina	14,900	12,000	11,600	12,800	13,000	12,400
Australia	9,079	10,145	7,993	10,869	9,780	10,375
Mexico	6,754	6,875	7,000	6,900	6,800	6,800
Russia	7,586	7,389	6,952	6,800	6,845	6,800
Colombia	5,670	5,300	5,200	5,150	5,125	5,125
New Zealand	4,446	4,523	4,530	4,747	4,760	4,880
Others	25,633	21,387	16,049	16,127	16,005	15,925
Total Foreign	259,828	250,445	241,724	245,988	245,965	245,945
United States	36,153	35,939	35,695	35,313	34,700	34,500
Total	295,981	286,384	277,419	281,301	280,665	280,445

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

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

Cattle Selected Countries Summary

(in 1,000 head)

	2008	2009	2010	2011	2012 Oct	2012 Apr
Total Imports						
Venezuela	306	407	612	320	400	500
Russia	58	49	38	95	55	100
China	15	47	85	91	100	97
Egypt	17	45	140	70	90	95
Canada	49	54	56	73	60	60
Mexico	90	20	25	16	20	20
Brazil	70	65	68	5	15	15
Japan	20	16	16	12	15	13
Ukraine	3	2	1	3	1	3
Belarus	1	0	1	1	1	1
Others	135	106	1	2	3	1
Total Foreign	764	811	1,043	688	760	905
United States	2,284	2,002	2,284	2,107	2,025	2,050
Total	3,048	2,813	3,327	2,795	2,785	2,955
Total Exports						
Mexico	738	980	1,261	1,435	1,425	1,435
Australia	869	954	875	695	700	700
Canada	1,598	1,067	1,065	696	600	700
EU-27	376	403	623	811	700	600
Brazil	414	530	655	405	600	500
Uruguay	169	207	227	175	210	225
Colombia	9	5	24	61	100	200
China	33	29	36	32	29	33
New Zealand	17	13	27	34	30	30
Ukraine	2	4	0	4	0	4
Others	95	109	2	1	1	1
Total Foreign	4,320	4,301	4,795	4,349	4,395	4,428
United States	107	58	91	191	140	225
Total	4,427	4,359	4,886	4,540	4,535	4,653

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

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

Swine Selected Countries Summary

(in 1,000 head)

	2008	2009	2010	2011	2012 Oct	2012 Apr
Total Beginning Stocks						
China	439,895	462,913	469,960	477,115	459,146	473,340
EU-27	159,732	153,067	152,198	150,773	149,100	148,384
Brazil	32,947	33,892	35,122	36,652	38,282	38,336
Russia	16,340	16,165	17,236	17,231	17,545	17,330
Canada	13,810	12,180	11,835	11,895	11,905	12,020
Japan	9,745	9,899	10,000	9,768	9,800	9,730
Mexico	9,401	9,310	8,979	9,007	9,240	9,276
Korea, South	8,742	8,223	8,721	8,449	6,806	8,171
Ukraine	7,020	6,526	7,577	7,960	7,570	7,479
Belarus	3,598	3,704	3,782	3,887	3,880	3,989
Others	5,003	2,412	2,302	2,289	2,400	2,343
Total Foreign	706,233	718,291	727,712	735,026	715,674	730,398
United States	68,177	67,148	64,887	64,925	65,850	66,361
Total	774,410	785,439	792,599	799,951	781,524	796,759
Production (Pig Crop)						
China	636,817	655,620	677,800	660,622	657,470	690,000
EU-27	258,400	257,700	262,200	263,200	258,000	261,000
Brazil	34,845	35,890	36,970	37,750	37,700	37,700
Russia	26,647	28,798	29,472	30,650	31,500	32,000
Canada	31,085	29,297	28,509	28,638	28,450	28,800
Japan	16,960	17,700	17,500	17,000	17,300	17,200
Mexico	15,924	15,966	16,200	16,350	16,300	16,500
Korea, South	13,792	14,916	14,923	13,308	14,600	13,900
Ukraine	6,619	7,400	8,176	7,820	8,200	7,980
Belarus	4,900	4,950	5,025	5,075	5,080	5,220
Others	9,507	4,467	4,625	4,731	4,800	4,810
Total Foreign	1,055,496	1,072,704	1,101,400	1,085,144	1,079,400	1,115,110
United States	115,030	114,542	113,685	115,487	117,050	117,116
Total	1,170,526	1,187,246	1,215,085	1,200,631	1,196,450	1,232,226

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.

Swine Selected Countries Summary

(in 1,000 head)

	2008	2009	2010	2011	2012 Oct	2012 Apr
Total Imports						
Russia	770	1,202	728	670	810	775
Ukraine	86	77	90	112	60	115
Mexico	80	7	9	12	15	15
China	12	6	6	15	12	12
Korea, South	2	0	2	16	5	5
Canada	2	3	3	3	2	3
Belarus	2	3	2	2	2	2
Brazil	1	0	5	2	0	1
EU-27	2	3	2	1	1	1
Japan	0	1	1	1	1	1
Others	1	0	0	0	0	0
Total Foreign	958	1,302	848	834	908	930
United States	9,348	6,365	5,749	5,796	5,725	5,800
Total	10,306	7,667	6,597	6,630	6,633	6,730
Total Exports						
Canada	9,357	6,376	5,761	5,821	5,740	5,820
China	1,645	1,602	1,636	1,468	1,600	1,600
EU-27	1,508	2,211	1,628	1,582	1,700	1,400
Brazil	1	1	1	6	0	8
Russia	0	1	1	1	1	1
Ukraine	0	0	1	1	0	1
Australia	0	0	0	0	0	0
Belarus	0	3	54	0	0	0
Japan	0	0	0	0	0	0
Korea, South	0	0	0	0	0	0
Others	0	0	0	0	0	0
Total Foreign	12,511	10,194	9,082	8,879	9,041	8,830
United States	97	21	15	30	24	30
Total	12,608	10,215	9,097	8,909	9,065	8,860

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.

Notes to Readers

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

Data Modifications

Cattle/Beef:

- Belarus –Based on additional analysis and information, PSDs for cattle and beef are revised from 1988 to present.
- Russia – Based on additional analysis and information, PSDs for beef are revised from 1988 to present.
- Multiple Countries – Based on new trade and/or production data, historical PSDs for beef are revised for Albania (1998-2010), Bosnia & Herzegovina (2003-2010), the Dominican Republic (2002-2010), Gabon (1998-2009), Georgia (1998-2010), Israel (2000-2010), Kuwait (2000-2010), Lebanon (1998-2010), Macedonia (1998-2009), Oman (1998-2010), Pakistan (2003-2010) and Saudi Arabia (1998-2010).

Swine/Pork:

- Belarus – Based on additional analysis and information, PSDs for swine and pork are revised from 1998 to present.
- Taiwan – Based on additional analysis and information, PSDs for pork are revised from 2006 to present.
- Multiple Countries – Based on new trade data, historical PSDs for pork are revised for Albania (1998-2010), Armenia (1998-2010), the Bahamas (1998-2010), Bosnia & Herzegovina (2003-2010), the Dominican Republic (2002-2010), Gabon (1998-2009), Georgia (1998-2010), Jamaica (1998-2010), Kyrgyzstan (2005-2010), Macau (1999-2010), Macedonia (1998-2009), Moldova (1998-2010), the Netherlands Antilles (1998-2008), Russia (1998-2010), and Trinidad & Tobago (1998-2010).

Broiler Meat:

- Australia – Based on additional analysis and information, PSDs for broiler meat are revised from 2000 to present.
- Belarus – Based on additional analysis and information, PSDs for broiler meat are revised from 1988 to present.
- Iran – Based on additional analysis and information, PSDs for broiler meat are revised from 1997 to present.
- Multiple Countries – Based on new trade and/or production data, historical PSDs for broiler meat are revised for Bahrain (2002-2010), EU-27 (1999-2010), Gabon (1998-2009), Georgia (1998-2010), Ghana (2006-2010), Iraq (2002-2011), Jamaica (1999-2010), Macedonia (2000-2009), Moldova (1998-2010) and Russia (1998-2010).

Turkey Meat:

- Data has not been revised since the October 2011 release.

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 and carabeef (buffalo meat) is included.

Assumptions

- **BSE:** Forecast assumes a continuation of trade policies due to BSE (bovine spongiform encephalopathy) currently in place by U.S. and Canadian trading partners as of April 10, 2012.
- **Other Diseases (AI, H1N1, FMD):** Forecast reflects policies currently in place as a result of outbreaks as of April 10, 2012.

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 January 2012 and on available secondary information. The individual country reports can be obtained on FAS Online at: http://www.fas.usda.gov/scriptsw/attacherep/default.asp.

PSD Online

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

Additional Resources

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

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

Future Releases and Contact Information

Please visit http://www.fas.usda.gov/dlp/livestock_poultry.asp to view archived and future releases. The next release of this circular will be in October 2012.

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