



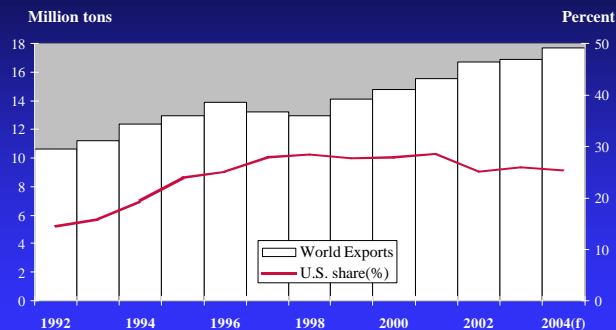
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Livestock and Poultry: World Markets and Trade

World Meat Exports in 2004 on the Rise; U.S. Market Share Expected to Remain Flat



In 2004 Meat Exports by Leading Suppliers Are Forecast to Rise

Total meat (beef, pork, and poultry) exports in 2004 by leading suppliers are forecast at a record 17.7 million tons, up 5 percent from the previous year. Anticipated strong exports from Brazil (beef and broilers), Canada (beef), the EU (broilers), and the United States (broilers) contribute to the growth in 2004.

U.S. total meat exports in 2004 are forecast at 4.5 million tons, up 3 percent from the previous year. The growth is primarily seen in broiler and

turkey exports, while gains in beef and pork exports are expected to be marginal. Despite the increase in export quantity, the U.S. share in the world market in 2004 is projected at 25 percent of total world exports, fractionally lower than the 2003 level, due mainly to increasing competition and restrictive import measures in key markets.

Beef exports for 2004 by leading suppliers are forecast to reach a record 6.9 million tons, an 8-percent increase from the 2003 level. Growth is seen primarily in Brazil and Canada. Brazil is expected to overtake Australia as the world's largest beef exporter, while Canada is expected to recover a portion of its export markets in the aftermath of Bovine Spongiform Encephalopathy (BSE). Selected Canadian beef products are now allowed for export to the United States and Mexico, key markets for Canadian beef.

Pork exports for 2004 by leading suppliers are estimated to reach 4 million tons, down 2 percent from the 2003 level, due mainly to lower exports from the EU. The decrease in EU pork exports is attributed to Japan's safeguard on pork imports and strong competition from Brazil in the Russian market. With the setback in EU exports, Canada is expected to become the world's leading pork exporter in 2004, although Canadian pork exports are forecast to remain near the 2003 level.

Broiler exports for 2004 by leading suppliers are forecast to reach about 6.2 million tons, up nearly 6 percent from the previous year. Strengthening exports from the EU, Brazil, and the United States contribute to the growth in 2004. EU broiler exports are projected to return to the 2002 level as the Netherlands recovers its production capacity after the Avian Influenza outbreak earlier this year. Brazil continues its expansion in broiler exports to key markets in the Middle East and the EU, while increasing its presence elsewhere offsetting losses in the Russian market. U.S. broiler exports to the world are estimated to rise nearly 4 percent from the previous year, supported by strong exports in key markets and growth in non-traditional markets throughout the world.