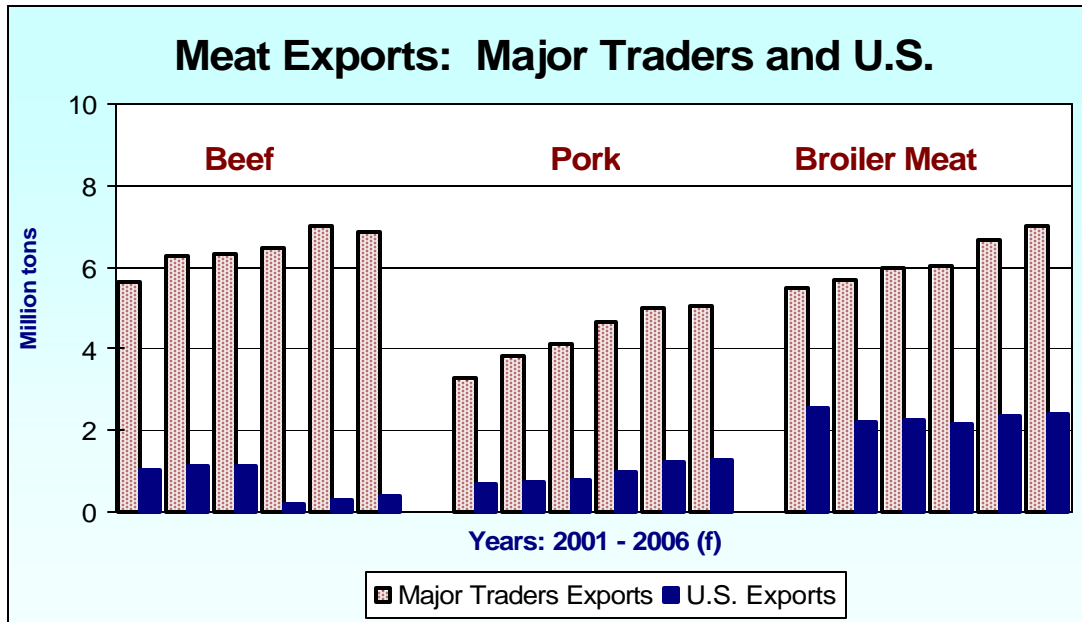




Livestock and Poultry: World Markets and Trade

Trade of Red Meats and Poultry Forecast Strong Among Major Traders in 2006 Despite Disease Outbreaks and Trade Restrictions



Source: Production, Supply and Distribution Database, FAS

Production and consumption of red meat and poultry products among selected countries remains robust despite the instability caused by continued animal disease outbreaks and their resulting trade impacts.

The November 2005 edition of *Livestock and Poultry: World Markets and Trade* forecasted trade of beef, pork and poultry by major exporters to reach record levels in 2006.

While this trend continues to be true for broiler meat and pork exports in the current forecast, the 2006 forecast of beef exports by major traders is revised downward to just below 7 million tons, slightly below the level exported in 2005.

In the current forecast pork exports will continue to remain above 5 million tons in 2006 for the second year in a row.

Although broiler exports are revised downward in the current forecast, they are still forecast to achieve record levels at almost 8 million tons in 2006. As anticipated in the November forecast and despite avian influenza (AI) concerns, broiler meat exports by major traders are forecast to surpass beef exports for the first time in 2006.

Note: Data in this document reflects the PSD (<http://www.fas.usda.gov/psd/>) and WASDE release of March 10, 2006.

Livestock and Poultry: World Markets and Trade

March 2006

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

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

	2001	2002	2003	2004	2005 (p)	2006 (f)	Percent Change 2005 to 2006
Production							
Beef and Veal /1	49,646	51,241	50,095	51,327	52,247	53,592	2.6%
Pork /1	83,881	86,802	89,231	91,393	94,202	97,207	3.2%
Broiler and Turkey /2	57,237	59,173	59,218	60,845	63,599	65,768	3.4%
Total	190,764	197,216	198,544	203,565	210,048	216,567	3.1%
Consumption							
Beef and Veal /1	48,708	50,265	49,017	49,817	50,274	51,743	2.9%
Pork /1	83,730	86,679	89,097	90,829	93,254	96,209	3.2%
Broiler & Turkey /2	55,637	57,623	57,640	58,928	61,639	63,543	3.1%
Total	188,075	194,567	195,754	199,574	205,167	211,495	3.1%
Imports							
Beef and Veal /1	4,972	5,231	5,043	4,837	5,016	5,039	0.5%
Pork /1	3,142	3,817	3,882	4,084	4,196	4,024	-4.1%
Broiler and Turkey /2	4,581	4,849	5,000	4,751	5,336	5,395	1.1%
Total	12,695	13,897	13,925	13,672	14,548	14,458	-0.6%
Exports							
Beef and Veal /1	5,672	6,275	6,340	6,499	7,037	6,889	-2.1%
Pork /1	3,265	3,787	4,119	4,681	5,017	5,053	0.7%
Broiler and Turkey /2	6,113	6,312	6,585	6,601	7,303	7,696	5.4%
Total	15,050	16,374	17,044	17,781	19,357	19,638	1.5%
U.S. Exports							
Beef and Veal /1	1,029	1,110	1,142	209	313	411	31.3%
Pork /1	707	731	779	989	1,207	1,250	3.6%
Broiler and Turkey /2	2,741	2,379	2,451	2,371	2,593	2,676	3.2%
Total	4,477	4,220	4,372	3,569	4,113	4,337	5.4%
U.S. Market Share (%) of Exports Among Major Traders							
Beef and Veal /1	18%	18%	18%	3%	4%	6%	2%
Pork /1	22%	19%	19%	21%	24%	25%	1%
Broiler and Turkey /2	45%	38%	37%	36%	36%	35%	-1%
Combined	30%	26%	26%	20%	21%	22%	1%

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: 2006 Forecast Overview

- **Trade restrictions impacting trade in an environment of tight supply**

With already limited trade in the world beef market due to bovine spongiform encephalopathy (BSE) and foot and mouth disease (FMD)-related trade restrictions, the 6-month beef export ban announced by the Argentine government in March 2006 will also have a noticeable impact on world trade. While the November 2005 forecast anticipated a nearly 3 percent increase in beef exports by major traders in 2006, the current forecast projects exports 2 percent lower in 2006 than in 2005 as increased exports by the United States, and New Zealand will not be enough to offset decreases by Brazil and Argentina.

- **2006: Selected countries to experience production and consumption growth**

Positive macroeconomic growth in 2006 will continue to encourage investment in the livestock sector and increase consumer demand. As a result, beef production and consumption in selected countries will continue to increase in 2006 by almost 3 percent each. The current forecast projects beef production gains in 2006 for Brazil (almost 3 percent), the European Union (EU) (less than 1 percent), and China (6 percent). The United States is forecast to increase beef production to nearly 12 million tons, a 5 percent increase over 2005, due as the herd expands and cattle are slaughtered at heavy weights. New Zealand beef production will expand in 2006 enabling them to serve Asian markets closed to the United States and Canada as well as continue sales to the United States and Canada. Exceptions to the generalization of world production growth are declines in Argentina (3 percent) due to constraints of exporting, Russia (nearly 4 percent) which lacks investment as other agricultural

enterprises are more profitable, and Canada. Australian beef production will continue to be constrained by reduced slaughter.

- **Argentina set to ban beef exports**

The November 2005 forecast projected an increase in Argentine beef exports in 2006 due to increased exports to Russia and Chile as a result of the absence of Brazil in these markets. The current forecast anticipates that Argentine beef exports will decrease by 34 percent from 759,000 tons in 2005 to 500,000 tons in 2006. The current forecast took into account exports during the first two months of 2006, continued sales to the EU under the Hilton quota and to Venezuela under a bilateral agreement, shipments of processed/cooked beef, and assumes and eventual resumption in world sales after the 6-month ban is lifted.

- **Brazil's exports stable despite FMD**

Brazil's 2005 and 2006 beef exports were forecast to remain stable at 1.8 million tons in November 2005. In the current forecast, the preliminary estimate for 2005 projected Brazilian beef exports was increased while the 2006 beef export forecast was kept stable. As a result, Brazilian beef exports will decline nearly 4 percent from 2005 to 2006 as FMD-related restrictions will affect sales to its major buyers, such as Russia. Russia is Brazil's most important market accounting for 27 percent of Brazilian fresh/chilled/frozen beef exports in 2005. It is anticipated that Brazilian exporters will continue to focus sales on smaller markets which continue to be open to Brazilian beef and shift to exporting from regions which are not impacted by FMD-related trade restrictions as many countries, such as the EU and Russia, have regionalized their bans on Brazilian product. However, it is unlikely that there will be a dramatic expansion in FMD-free regions to permit exports to expand.

Pork: 2006 Forecast Overview

- **Note on PSD database: Chile added**

The FAS Production, Supply and Distribution (PS&D) database now includes Chile for swine and pork. Data is available for 2001-2006. If it were not for the inclusion of Chile, 2006 pork exports by major traders would show a decline from 2005 to 2006 in the current forecast. Chile ranks 6th among major pork exporters.

- **2006: Production and trade among selected countries to climb**

Preliminary estimates increase pork production among selected countries in 2005 and 2006 compared to the November 2005 forecast for 2006. Thus, pork production among selected countries will increase 3 percent to 97.2 million tons in 2006. Pork exports by major traders will basically be stagnant (36,000 ton difference) at nearly 5.1 million tons in 2006 compared to slightly above 5.0 million tons in 2005. This is largely due to the fact that most of the larger production increases are being consumed in the producing countries themselves. For example, gains in Chinese, EU and U.S. production are largely being consumed domestically. The return of U.S. beef to Japan is resulting in decreased forecasted pork imports in 2006 for Japan.

- **China's domination grows**

China now accounts for more than half (53.5 percent) of the production of pork among selected countries. Thus, small changes in Chinese production and consumption have a significant impact on the total of selected countries. The current forecast increases Chinese pork production by 2 percent from the November 2005 forecast to a record 52 million tons. With this upward revision, China will increase pork production by almost 5 percent from 2005 to 2006 due to a

variety of factors including its popularity in the Chinese diet, continued higher disposable incomes, strong profitability in the pork sector, increased investment in swine and pork operations, and increased pork consumption due to AI. However, due to strong domestic demand, the current forecast sharply drops Chinese pork exports from 415,000 tons in the November 2005 forecast to 300,000 tons.

- **EU pork production continues expansion**

EU pork production has been revised upward to 21.5 million tons largely due to gains in Germany and Poland. A variety of factors will impact EU pork production in 2006 including substitution for poultry due to AI concerns and beneficial production conditions such as lower feed costs in the New Member States. Thus, in addition to production estimates, EU pork consumption has been raised accordingly. While EU pork to Japan will weaken as it is not as price competitive as U.S. pork and will compete with the return of U.S. beef to the markets, EU pork exports to Russia could expand. Thus, EU pork exports in 2006 are forecast to increase 5 percent to nearly 1.5 million tons, which is unchanged from the November 2005 forecast.

- **Historic high for U.S. pork exports**

U.S. pork exports are still expected to be nearly 1.3 million tons in 2006. As U.S. pork production is increasingly export driven, accounting now for 12.9 percent of production, the current low valued U.S. dollar is helping make U.S. pork attractive to overseas buyers. U.S. pork exports to Russia will continue to grow particularly with Brazil unable to ship to the key market due to FMD-related restrictions which limit shipments from key production areas.

Poultry: 2006 Forecast Overview

Broiler Meat

- **Despite AI, positive outlook for broilers**

Since the November 2005 forecast, avian influenza (AI) has reached well beyond Asia and Russia into Western Europe and Africa, including an outbreak on a commercial turkey operation in France. Despite numerous AI outbreaks, production, consumption and trade remains strong among selected countries and will continue to increase. While Chinese broiler meat production was revised downward to 10.4 million tons due to AI, this figure still represents an increase from the 10.2 million tons produced in 2005. Alternatively Brazilian broiler production was revised upward to a record 10.0 million tons, a 7 percent increase over 2005 production. Brazilian broiler meat production is benefiting from strong domestic demand, export expansion, and fewer competitors in the world market for frozen poultry meat due to AI-related trade restrictions.

While the 2006 forecast for broiler meat exports by major traders is revised downward since the November 2005 forecast, exports are anticipated to increase nearly 6 percent in 2006 as a result in gains by Argentina, Brazil, China and Thailand. Though unable to ship uncooked product to key markets, Thai cooked products will continue to benefit from their reputation of better quality and lower prices than their competitors such as Brazil and China. The current Thai broiler export forecast reflects that there have been no new AI outbreaks and there will be continued recovery of the sector. The end result is that there is still overall growth in broiler meat consumption and exports by selected countries, however the outlook is slightly less optimistic.

- **EU reaction to AI**

EU broiler meat production and consumption is forecast to be marginally affected by the current AI situation. In the November 2005 forecast, EU broiler meat production was anticipated to remain unchanged at 7.7 million tons for 2005 and 2006. The current forecast shows a slight decrease (1 percent) from 7.6 million tons in 2005 to 7.5 million tons in 2006. Similarly, the current forecast projects an over 1 percent decline in EU broiler meat consumption from 2005 to 2006. However, negative consumer reaction is expected to be short-lived and largely concentrated in more southern EU countries such as Italy, Greece, and France. The impact on trade is anticipated to be more significant and the current forecast shows that EU broiler meat exports will decline nearly 3 percent from 2005 to 2006 largely due to decreased exports from France which is the largest poultry exporter in the EU. Further details on the impact of AI in the EU are available in the GAIN report: "EU-25 - Poultry and Products: Avian Influenza: Impacts of Outbreaks on European Poultry and Meat Markets" (E36038, 3/7/2006) which can be viewed online at <http://www.fas.usda.gov>.

- **U.S. exports forecast to continue growth**

U.S. broiler meat exports are forecast to increase to 2.4 million tons in 2006, up 3 percent from 2005. Despite current sluggish leg quarter exports due to reduced import demand as a result of AI in importing countries, exports are anticipated to recover later in 2006. However, most of the increase in U.S. broiler meat production will translate into higher domestic consumption which is forecast to increase 3 percent in 2006 to 13.9 million tons.

Turkey Meat

- **U.S. production and exports grown while major traders stagnant**

Turkey meat production is forecast to be essentially static between 2005 and 2006 at 4.9 million tons. Exports will increase just over 4 percent to 650,000 tons. Turkey production in the United States, the world's largest producer among selected countries, will increase by 1.3 percent to 2.5 million tons. U.S. turkey exports will increase by over 5 percent to 272,000 tons.

- **Significant revisions to EU turkey data**

The current forecast includes a significant revision to EU turkey data for 2001 to 2006. As the EU is the world's second largest producer among selected countries, these data revisions had a significant impact on the total for major traders and also impacted trends. Thus, a comparison of the November 2005 forecast to the current forecast for total major traders is not possible. The revisions to the EU data are reported in a GAIN report "EU-25 - Poultry and Products: Review of historical data in relations to the EU 2006 poultry semi-annual" (E36016, 1/31/2006) which can be viewed online at <http://www.fas.usda.gov>. As the text of the report notes, a revision of trade figures due to the removal of the split of German salted poultry imports over turkey resulted in changes in domestic consumption.

Beef and Veal Summary Selected Countries

1,000 Metric Tons (Carcass Weight Equivalent)

	2001	2002	2003	2004	2005 (p)	2006 (f)
Production						
Brazil	6,895	7,240	7,385	7,975	8,592	8,810
European Union 1/	8,084	8,145	8,061	8,007	7,770	7,820
China, Peoples Republic of	5,488	5,846	6,305	6,759	7,140	7,575
Argentina	2,640	2,700	2,800	3,130	3,200	3,100
India 2/	1,770	1,810	1,960	2,130	2,230	2,300
Mexico	1,925	1,930	1,950	2,099	2,125	2,175
Australia	2,049	2,089	2,073	2,081	2,125	2,150
Russian Federation	1,760	1,740	1,670	1,590	1,525	1,470
Canada	1,250	1,294	1,190	1,496	1,475	1,450
New Zealand	609	589	693	720	705	735
Others 3/	5,193	5,431	3,969	4,079	4,043	4,116
Total Foreign	37,663	38,814	38,056	40,066	40,930	41,701
United States	11,983	12,427	12,039	11,261	11,317	11,891
Total	49,646	51,241	50,095	51,327	52,247	53,592
Consumption						
European Union 1/	7,658	8,187	8,315	8,292	8,145	8,200
China, Peoples Republic of	5,434	5,818	6,274	6,703	7,051	7,478
Brazil	6,191	6,437	6,273	6,400	6,774	7,035
Argentina	2,514	2,362	2,426	2,512	2,446	2,604
Mexico	2,341	2,409	2,308	2,368	2,419	2,505
Russian Federation	2,400	2,450	2,378	2,308	2,200	2,175
India 2/	1,400	1,393	1,521	1,631	1,610	1,625
Japan	1,419	1,319	1,366	1,181	1,195	1,237
Canada	969	990	1,065	1,054	1,052	1,030
Australia	653	696	786	747	749	760
Others 3/	5,378	5,467	3,965	3,954	3,966	4,033
Total Foreign	36,357	37,528	36,677	37,150	37,607	38,682
United States	12,351	12,737	12,340	12,667	12,666	13,061
Total	48,708	50,265	49,017	49,817	50,273	51,743

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

Note: 1/ EU data includes 25 member states for all years. 2/ Includes buffalo. 3/ From 2003, Colombia, Costa Rica, Dominican Republic, El Salvador, Honduras, Nicaragua and Venezuela are dropped from the database.

(p) preliminary; (f) forecast

Beef and Veal Summary Selected Countries

1,000 Metric Tons (Carcass Weight Equivalent)

	2001	2002	2003	2004	2005 (p)	2006 (f)
Imports						
Japan	1,002	712	851	647	700	737
Russian Federation	648	719	720	730	680	710
European Union 1/	358	461	463	584	625	600
Mexico	426	489	370	287	325	365
Korea, South	246	430	444	218	243	252
Philippines	113	126	129	164	160	165
Egypt	136	162	93	114	120	140
Canada	300	308	274	111	133	125
Taiwan	78	89	98	80	92	98
Hong Kong	71	71	80	81	92	92
Others 3/	159	205	158	152	214	177
Total Foreign	3,537	3,772	3,680	3,168	3,384	3,461
United States	1,435	1,459	1,363	1,669	1,632	1,583
Total	4,972	5,231	5,043	4,837	5,016	5,044
Exports						
Brazil	748	881	1,175	1,628	1,867	1,800
Australia	1,399	1,366	1,264	1,394	1,413	1,400
India 2/	370	417	439	499	620	675
New Zealand	496	486	558	606	589	625
Canada	575	610	384	560	553	550
Argentina	169	348	386	623	759	500
Uruguay	145	262	325	410	460	470
European Union 1/	502	485	388	358	250	220
China, Peoples Republic of	60	44	43	61	91	100
Ukraine	98	181	202	108	85	90
Others 3/	81	85	34	43	43	53
Total Foreign	4,643	5,165	5,198	6,290	6,730	6,483
United States	1,029	1,110	1,142	209	313	411
Total	5,672	6,275	6,340	6,499	7,043	6,894

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

Note: 1/ EU data includes 25 member states for all years. 2/ Includes buffalo. 3/ From 2003, Colombia, Costa Rica, Dominican Republic, El Salvador, Honduras, Nicaragua and Venezuela are dropped from the database.

(p) preliminary; (f) forecast

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

	2001	2002	2003	2004	2005 (p)	2006 (f)
Production						
China, Peoples Republic of	41,845	43,266	45,186	47,016	49,685	52,000
European Union 1/	20,427	20,938	21,150	21,192	21,200	21,520
Brazil	2,230	2,565	2,560	2,600	2,800	2,775
Canada	1,731	1,854	1,882	1,936	1,915	1,910
Russian Federation	1,560	1,630	1,710	1,725	1,755	1,785
Japan	1,245	1,236	1,260	1,272	1,250	1,260
Mexico	1,065	1,085	1,100	1,150	1,195	1,200
Philippines	1,064	1,095	1,145	1,145	1,100	1,122
Korea, South	1,077	1,153	1,149	1,100	1,036	1,055
Taiwan	962	935	893	898	920	935
Others	1,984	2,116	2,140	2,047	1,954	2,013
Total Foreign	75,190	77,873	80,175	82,081	84,810	87,575
United States	8,691	8,929	9,056	9,312	9,392	9,632
Total	83,881	86,802	89,231	91,393	94,202	97,207
Consumption						
China, Peoples Republic of	41,829	43,238	45,098	46,725	49,395	51,750
European Union 1/	19,317	19,746	20,043	19,773	19,839	20,085
Japan	2,268	2,377	2,373	2,562	2,512	2,500
Russian Federation	2,076	2,453	2,420	2,337	2,429	2,484
Brazil	1,919	1,975	1,957	1,979	2,039	2,140
Mexico	1,298	1,349	1,423	1,556	1,556	1,585
Korea, South	1,158	1,199	1,294	1,331	1,282	1,297
Philippines	1,085	1,137	1,167	1,170	1,130	1,152
Taiwan	977	967	947	959	959	973
Canada	1,082	1,072	1,004	1,072	978	958
Others	2,332	2,481	2,555	2,548	2,464	2,459
Total Foreign	75,341	77,994	80,281	82,012	84,583	87,383
United States	8,389	8,685	8,816	8,817	8,671	8,826
Total	83,730	86,679	89,097	90,829	93,254	96,209

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

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

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

Pork Summary Selected Countries

1,000 Metric Tons (Carcass Weight Equivalent)

	2001	2002	2003	2004	2005 (p)	2006 (f)
Imports						
Japan	1,068	1,162	1,133	1,302	1,339	1,200
Russian Federation	528	834	725	629	675	700
Mexico	294	325	371	458	420	450
Hong Kong	260	275	302	332	305	313
Korea, South	123	155	153	220	328	235
Romania	63	106	133	179	185	180
Canada	91	91	91	105	139	160
Australia	38	55	67	77	99	99
Ukraine	2	2	10	52	75	60
China, Peoples Republic of	123	188	194	92	41	50
Others	121	138	165	139	126	123
Total Foreign	2,711	3,331	3,344	3,585	3,732	3,570
United States	431	486	538	499	464	454
Total	3,142	3,817	3,882	4,084	4,196	4,024
Exports						
European Union 1/	1,135	1,158	1,234	1,463	1,380	1,450
Canada	728	864	975	972	1,083	1,110
Brazil	337	590	603	621	761	625
China, Peoples Republic of	139	216	282	383	331	300
Chile	32	59	80	102	129	174
Mexico	61	61	48	52	59	65
Australia	67	78	74	59	53	55
Korea, South	42	16	17	10	5	10
Ukraine	2	1	12	8	6	10
Romania	0	0	0	5	2	3
Others	15	13	15	17	1	1
Total Foreign	2,558	3,056	3,340	3,692	3,810	3,803
United States	707	731	779	989	1,207	1,250
Total	3,265	3,787	4,119	4,681	5,017	5,053

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

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

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

Broiler Summary Selected Countries

1,000 Metric Tons (Ready to Cook Equivalent)

	2001	2002	2003	2004	2005 (p)	2006 (f)
Production						
China, Peoples Republic of	9,278	9,558	9,898	9,998	10,200	10,350
Brazil	6,567	7,449	7,645	8,408	9,360	10,035
European Union 2/	7,883	7,788	7,512	7,627	7,625	7,540
Mexico	2,067	2,157	2,290	2,389	2,510	2,635
India	1,250	1,400	1,500	1,650	1,900	2,200
Argentina	870	640	750	910	1,080	1,180
Japan	1,074	1,107	1,127	1,124	1,165	1,150
Thailand	1,230	1,275	1,340	900	950	1,100
Canada	927	932	929	946	1,000	1,020
Malaysia	813	784	835	862	896	920
Others 1/	6,311	6,598	5,760	5,852	6,165	6,538
Total Foreign	38,270	39,688	39,586	40,666	42,851	44,668
United States	14,033	14,467	14,696	15,286	15,870	16,233
Total	52,303	54,155	54,282	55,952	58,721	60,901
Consumption						
China, Peoples Republic of	9,237	9,556	9,963	9,931	10,150	10,325
European Union 2/	7,359	7,417	7,312	7,280	7,370	7,270
Brazil	5,341	5,873	5,742	5,992	6,622	7,135
Mexico	2,311	2,424	2,627	2,713	2,883	3,029
India	1,250	1,400	1,496	1,648	1,900	2,199
Russian Federation	1,588	1,697	1,680	1,675	1,949	2,095
Japan	1,797	1,830	1,841	1,713	1,877	1,905
Argentina	881	618	719	845	973	1,034
South Africa	786	830	928	959	997	1,026
Canada	924	925	933	972	984	995
Others 1/	7,822	7,995	7,099	7,367	7,746	8,021
Total Foreign	39,296	40,565	40,340	41,095	43,451	45,034
United States	11,558	12,270	12,540	13,080	13,455	13,878
Total	50,854	52,835	52,880	54,175	56,906	58,912

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

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

2/ EU data includes 25 member states for all years.

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

Broiler Summary Selected Countries

1,000 Metric Tons (Ready to Cook Equivalent)

	2001	2002	2003	2004	2005 (p)	2006 (f)
Imports 1/						
Russian Federation	1,281	1,208	1,081	1,016	1,190	1,240
Japan	710	744	695	582	748	735
Saudi Arabia	399	391	452	429	480	490
European Union 3/	202	500	588	466	485	450
Mexico	245	267	338	326	374	395
China, Peoples Republic of	448	436	453	174	281	350
Hong Kong	183	164	154	244	222	226
South Africa	64	80	125	154	175	190
United Arab Emirates	125	133	154	158	160	160
Kuwait	63	57	81	119	130	138
Others 2/	423	445	474	687	634	570
Total Foreign	4,143	4,425	4,595	4,355	4,879	4,944
United States	6	6	6	12	15	16
Total	4,149	4,431	4,601	4,367	4,894	4,960
Exports 1/						
Brazil	1,226	1,577	1,903	2,416	2,739	2,900
European Union 3/	726	871	788	813	740	720
China, Peoples Republic of	489	438	388	241	331	375
Thailand	392	427	485	200	240	300
Argentina	13	23	39	66	110	150
Canada	69	84	76	74	100	105
Kuwait	0	1	3	4	20	26
United Arab Emirates	20	37	40	15	20	20
Australia	19	15	15	13	14	14
Saudi Arabia	20	20	20	10	10	10
Others 2/	33	28	33	21	21	22
Total Foreign	3,007	3,521	3,790	3,873	4,345	4,642
United States	2,520	2,180	2,232	2,170	2,335	2,404
Total	5,527	5,701	6,022	6,043	6,680	7,046

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

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

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

3/ EU data includes 25 member states for all years.

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

Turkey Summary Selected Countries

1,000 Metric Tons (Ready to Cook Equivalent)

	2001	2001	2003	2004	2005 (p)	2006 (f)
Production						
European Union 2/	2,098	2,102	2,025	2,030	1,945	1,865
Brazil	165	182	200	240	275	310
Canada	149	147	148	145	155	156
Russian Federation	7	9	12	15	17	18
Mexico	13	13	14	13	13	13
South Africa	4	3	4	5	5	5
Taiwan	5	5	4	4	4	4
Others 1/	3	0	0	0	0	0
Total Foreign	2,444	2,461	2,407	2,452	2,414	2,371
United States	2,490	2,557	2,529	2,441	2,464	2,496
Total	4,934	5,018	4,936	4,893	4,878	4,867
Consumption						
European Union 2/	1,887	1,863	1,885	1,913	1,860	1,775
Mexico	157	153	172	157	197	207
Canada	135	142	136	141	145	147
Brazil	96	92	88	104	114	123
Russian Federation	171	174	126	112	117	118
South Africa	19	16	32	33	29	30
Taiwan	13	16	20	21	22	23
Others 1/	36	16	0	0	0	0
Total Foreign	2,514	2,472	2,459	2,481	2,484	2,423
United States	2,269	2,316	2,301	2,272	2,248	2,208
Total	4,783	4,788	4,760	4,753	4,732	4,631

reports, official statistics,
2005, Hong Kong, Korea,
25 member states for all
(p) preliminary; (f) forecast

Selected
1,000 Metric Tons

	2001	2001	2003	2004	2005 (p)	2006 (f)
Imports						
Mexico	152	147	158	144	185	195
Russian Federation	164	165	114	97	100	100
European Union 2/	62	60	76	88	100	80
South Africa	15	13	28	28	24	25
Taiwan	8	11	16	17	18	19
Canada	5	6	6	8	10	12
Others 1/	26	16	0	0	0	0
Total Foreign	432	418	398	382	437	431
United States	0	0	1	2	4	4
Total	432	418	399	384	441	435
Exports						
Brazil	69	90	112	136	161	187
European Union 2/	273	299	216	205	185	170
Canada	14	16	16	16	18	20
Mexico	8	7	0	0	1	1
Others 1/	1	0	0	0	0	0
Total Foreign	365	412	344	357	365	378
United States	221	199	219	201	258	272
Total	586	611	563	558	623	650

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

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

2/ EU data includes 25 member states for all years.

(p) preliminary; (f) forecast

Live Cattle Summary Selected Countries

Million Head

	2001	2002	2003	2004	2005 (p)	2006 (f)
Beginning Inventories						
India 2/	313.8	317.0	323.0	327.3	330.3	332.2
Brazil	150.4	156.3	161.5	165.5	169.6	173.8
China, Peoples Republic of	128.7	128.2	130.8	134.7	137.8	140.7
European Union 1/	91.4	90.3	88.7	87.5	86.4	85.9
Argentina	50.2	50.4	50.9	50.8	50.2	50.2
Australia	27.7	27.9	27.9	26.6	27.3	28.1
Mexico	28.4	28.5	29.2	28.4	27.6	27.0
Russian Federation	25.5	24.5	23.5	22.3	21.1	19.9
Canada	13.6	13.8	13.5	14.7	15.1	14.8
South Africa	13.5	13.5	13.6	13.5	13.5	13.7
Others 3/	108.5	110.8	67.9	65.0	61.6	61.2
Total Foreign	951.7	961.2	930.5	936.2	940.3	947.4
United States	97.3	96.7	96.1	94.9	95.4	97.1
Total	1,049.0	1,057.9	1,026.6	1,031.1	1,035.8	1,044.5
Production						
China, Peoples Republic of	41.7	47.2	51.7	54.2	57.0	60.1
Brazil	41.4	43.5	44.9	46.2	48.3	50.9
India 2/	45.8	45.5	46.2	47.5	48.5	49.5
European Union 1/	31.7	31.9	31.8	31.0	30.5	30.5
Argentina	14.0	13.8	14.0	15.0	15.4	15.5
Australia	9.7	10.1	8.8	10.0	10.1	10.2
Mexico	7.7	7.7	7.2	7.3	7.5	7.8
Russian Federation	9.5	9.2	8.8	8.4	8.0	7.5
Canada	5.6	5.7	5.8	5.5	5.6	5.6
New Zealand	3.9	4.4	4.5	4.5	4.5	4.5
Others 3/	32.8	32.3	21.6	20.8	20.4	20.3
Total Foreign	243.7	251.3	245.3	250.3	255.8	262.4
United States	38.3	38.2	37.9	37.5	37.8	38.3
Total	282.0	289.5	283.2	287.9	293.5	300.7

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

Note: 1/EU data includes 25 member states for all years. 2/Includes buffalo. 3/ From 2003, Colombia, Costa Rica, Dominican Republic, El Salvador, Honduras, Nicaragua and Venezuela are dropped from the database.

(p) preliminary; (f) forecast

Live Cattle Summary Selected Countries

1,000 Head

	2001	2002	2003	2004	2005 (p)	2006 (f)
Imports						
South Africa	105	145	130	145	155	150
Egypt	239	145	5	2	70	100
Mexico	257	206	53	68	75	85
European Union 1/	48	48	65	68	65	60
Philippines	100	120	100	55	60	60
China, Peoples Republic of	3	11	50	132	50	46
Russian Federation	9	11	10	7	10	40
Canada	302	138	63	19	21	25
Japan	19	15	23	21	25	22
India	2	5	5	5	5	5
Others 3/	386	360	185	9	8	6
Total Foreign	1,470	1,204	689	531	544	599
United States	2,437	2,503	1,752	1,371	1,815	2,175
Total	3,907	3,707	2,441	1,902	2,359	2,774
Exports						
Mexico	1,142	948	1,240	1,375	1,260	1,175
Canada	1,310	1,690	507	0	562	1,000
Australia	822	972	774	638	580	550
European Union 1/	358	509	475	435	325	300
Romania	67	98	152	172	160	150
Brazil	0	1	3	16	113	100
China, Peoples Republic of	57	58	51	59	54	51
New Zealand	11	11	18	69	50	50
Uruguay	14	10	12	41	30	50
Bulgaria	24	22	25	25	25	25
Others 3/	427	479	217	94	19	19
Total Foreign	4,232	4,798	3,474	2,924	3,178	3,470
United States	449	244	99	16	21	30
Total	4,681	5,042	3,573	2,940	3,199	3,500

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

Note: 1/EU data includes 25 member states for all years. 2/Includes buffalo. 3/ From 2003, Colombia, Costa Rica, Dominican Republic, El Salvador, Honduras, Nicaragua and Venezuela are dropped from the database.

(p) preliminary; (f) forecast

Live Swine Summary Selected Countries

Million Head

	2001	2002	2003	2004	2005 (p)	2006 (f)
Beginning Inventories						
China; Peoples Republic of	446.8	457.4	462.9	466.0	481.9	500.3
European Union 1/	152.8	152.5	154.3	152.8	151.1	153.1
Brazil	32.4	32.7	32.7	32.1	32.3	32.9
Russian Federation	15.8	16.6	17.0	17.2	16.5	16.7
Canada	13.6	14.4	14.7	14.6	14.7	14.5
Philippines	11.7	11.8	12.2	12.5	12.1	12.1
Mexico	10.6	10.6	10.5	10.7	10.3	10.0
Japan	9.8	9.6	9.7	9.7	9.6	9.5
Korea, South	7.4	7.9	8.1	8.4	8.0	8.1
Taiwan	7.5	7.2	6.8	6.8	6.8	7.2
Others	17.9	18.8	20.6	18.3	17.1	17.3
Total Foreign	726.3	739.4	749.6	749.1	760.5	781.8
United States	59.1	59.7	59.6	60.4	61.0	61.2
Total	785.5	799.1	809.1	809.5	821.5	843.0

Production (Pig Crop)						
China, Peoples Republic of	563.0	575.2	597.8	636.7	675.0	700.0
European Union 1/	255.1	260.0	254.2	249.2	251.0	252.7
Russian Federation	32.2	34.2	35.0	35.0	36.0	38.2
Canada	28.2	29.6	31.4	33.1	32.6	32.4
Brazil	29.2	30.1	29.7	30.0	32.3	31.3
Philippines	21.0	21.5	23.1	22.8	22.1	22.5
Japan	17.1	17.0	17.3	17.2	17.0	17.1
Mexico	15.1	15.3	15.3	15.4	15.5	15.7
Korea, South	15.0	15.9	15.9	14.8	13.8	14.1
Taiwan	11.3	10.5	10.3	11.9	12.0	12.2
Others	25.0	27.0	24.0	22.5	22.8	23.5
Total Foreign	1,012.1	1,036.4	1,054.0	1,088.6	1,130.2	1,159.6
United States	100.6	101.7	101.5	102.8	103.7	105.0
Total	1,112.7	1,138.0	1,155.5	1,191.4	1,233.8	1,264.6

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

Notes: 1/ EU data includes 25 member states for all years.

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

Live Swine Summary Selected Countries

1,000 Head

	2001	2002	2003	2004	2005 (p)	2006 (f)
Imports						
Mexico	86	246	184	190	189	200
Romania	292	231	116	124	145	150
Russian Federation	2	6	33	130	45	50
China; Peoples Republic of	1	1	2	2	3	3
Canada	4	14	4	3	1	2
Philippines	1	2	0	1	1	1
Korea, South	1	1	1	1	1	1
European Union 1/	7	7	0	1	1	1
Bulgaria	0	1	1	1	1	1
Others	0	1	1	0	1	0
Total Foreign	394	510	342	453	388	409
United States	5,337	5,741	7,438	8,506	8,191	8,600
Total	5,731	6,251	7,780	8,959	8,579	9,009
Exports						
Canada	5,344	5,740	7,442	8,511	8,215	8,600
China, Peoples Republic of	1,973	1,889	1,887	1,973	1,769	2,000
European Union 1/	378	355	271	446	800	700
Australia	2	14	2	1	1	1
Others	1	1	0	1	0	0
Total Foreign	7,698	7,999	9,602	10,932	10,785	11,301
United States	65	206	170	174	149	150
Total	7,763	8,205	9,772	11,106	10,934	11,451

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

Notes: 1/ EU data includes 25 member states for all years.

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

Beef: Per Capita Consumption Summary Selected Countries

Kilograms Per Person

	2001	2002	2003	2004	2005 (p)	2006 (f)
Beef						
Argentina	66.3	61.6	62.6	64.2	61.9	65.2
Australia	33.7	35.6	39.8	37.5	37.3	37.5
Brazil	34.8	35.8	34.5	34.8	36.4	37.4
Bulgaria	5.0	4.9	4.9	5.1	5.1	5.1
Canada	30.7	31.0	33.1	32.4	32.1	31.1
China, Peoples Republic of	4.3	4.5	4.9	5.2	5.4	5.7
European Union 1/	16.9	18.0	18.3	18.2	17.9	17.9
Egypt	4.0	4.1	3.6	3.7	3.7	3.8
Hong Kong	12.8	12.6	13.7	13.9	15.4	15.3
India 2/	1.4	1.3	1.4	1.5	1.5	1.5
Japan	11.2	10.4	10.7	9.3	9.4	9.7
Korea, South	10.9	12.7	12.6	9.6	9.0	9.3
Mexico	23.1	23.3	22.1	22.4	22.6	23.1
New Zealand	19.8	15.7	18.7	15.8	15.6	14.7
Philippines	3.9	4.1	4.1	4.5	4.3	4.4
Romania	4.7	3.5	3.4	4.4	4.9	4.9
Russian Federation	16.3	16.7	16.2	15.7	15.0	14.9
South Africa	14.9	14.3	13.9	15.0	15.6	15.8
Taiwan	3.7	4.2	4.6	3.7	4.2	4.5
Turkey	4.8	4.8	4.7	4.6	4.5	4.4
Ukraine	11.5	11.2	8.6	10.8	10.0	9.5
United States	43.3	44.3	42.5	43.2	42.8	43.8
Uruguay	25.7	24.7	18.5	19.9	21.2	27.0

Sources: USDA -FAS attache reports, official statistics, and results of office research. Population statistics from U.S. Census Bureau, Population Division, International Programs Center.

Notes: 1/ EU data includes 25 member states for all years. 2/ Includes buffalo.

(p) preliminary; (f) forecast

Pork: Per Capita Consumption Summary Selected Countries

Kilograms Per Person

	2001	2002	2003	2004	2005 (p)	2006 (f)
Pork						
Australia	18.6	19.2	20.8	20.8	21.3	21.4
Brazil	10.8	11.0	10.8	10.7	11.0	11.4
Bulgaria	9.2	12.6	11.1	8.1	7.9	7.6
Canada	28.9	27.6	25.1	26.7	23.9	22.9
Chile	17.7	18.8	18.2	17.2	17.7	17.5
China, Peoples Republic of	32.8	33.7	34.9	36.0	37.8	39.4
European Union 1/	42.7	43.5	44.1	43.4	43.5	44.0
Hong Kong	63.3	62.4	65.6	71.9	65.7	65.4
Japan	17.9	18.7	18.7	20.1	19.7	19.6
Korea, South	24.3	25.0	26.8	27.5	26.4	26.6
Mexico	12.8	13.2	13.7	14.8	14.7	14.8
Philippines	13.0	13.7	13.8	13.6	12.9	12.9
Romania	9.4	10.2	10.9	14.4	14.3	14.3
Russian Federation	13.6	16.3	16.2	15.8	16.5	17.0
Taiwan	43.8	43.1	41.9	42.2	41.9	42.2
Ukraine	12.5	12.5	13.2	12.7	11.6	11.6
United States	29.4	30.2	30.4	30.1	29.3	29.6

Sources: USDA-FAS attache reports, official statistics, and results of office research. Population statistics from U.S. Census Bureau, Population Division, International Programs Center.

Notes: 1/ EU data includes 25 member states for all years.

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

Poultry: Per Capita Consumption Summary Selected Countries

Kilograms Per Person

	2001	2002	2003	2004	2005 (p)	2006 (f)
Broiler Meat						
Argentina	23.2	16.1	18.6	21.6	24.6	25.9
Australia	28.4	31.5	30.6	31.9	34.3	35.8
Brazil	30.0	32.6	31.5	32.5	35.6	37.9
Canada	29.2	29.0	28.9	29.9	30.0	30.1
China, Peoples Republic of	7.2	7.4	7.7	7.6	7.8	7.9
European Union 1/	16.3	16.3	16.1	16.0	16.2	15.9
Hong Kong	36.0	33.3	31.1	37.6	38.8	39.3
India	1.2	1.4	1.4	1.5	1.8	2.0
Indonesia	2.3	2.7	3.1	2.6	2.6	2.7
Japan	14.2	14.4	14.5	13.5	14.7	14.9
Korea, South	10.4	11.0	10.7	9.6	10.4	10.8
Kuwait	45.5	41.7	49.5	63.3	61.2	60.8
Malaysia	38.1	36.4	37.7	37.2	38.0	38.4
Mexico	22.8	23.7	25.3	25.8	27.1	28.2
Philippines	7.3	7.6	7.6	7.7	7.6	7.6
Romania	5.5	5.0	5.9	7.1	8.0	7.8
Russian Federation	10.8	11.5	11.6	11.6	13.6	14.7
Saudi Arabia	33.5	33.1	35.7	34.3	35.9	35.9
South Africa	17.7	18.7	20.9	21.6	22.5	23.2
Taiwan	28.2	28.1	27.8	28.5	29.3	29.6
Thailand	13.1	13.2	12.1	10.1	11.8	12.7
Ukraine	2.3	3.3	4.5	10.3	8.4	8.9
United Arab Emirates	55.2	51.9	59.2	70.5	68.3	68.0
United States	40.6	42.7	43.2	44.6	45.5	46.5
Venezuela	14.2	11.9	11.8	13.6	14.4	15.5
Turkey						
Brazil	0.5	0.5	0.5	0.6	0.6	0.7
Canada	4.3	4.5	4.2	4.3	4.4	4.4
European Union 1/	4.2	4.1	4.1	4.2	4.1	3.9
Mexico	1.6	1.5	1.7	1.5	1.9	1.9
Russian Federation	1.2	1.2	0.9	0.8	0.8	0.8
South Africa	0.4	0.4	0.7	0.7	0.7	0.7
Taiwan	0.6	0.7	0.9	0.9	1.0	1.0
United States	8.0	8.1	7.9	7.8	7.6	7.4

Sources: USDA-FAS attache reports, official statistics, and results of office research. Population statistics from U.S. Census Bureau, Population Division, International Programs Center.

Notes: 1/ EU data includes 25 member states for all years.

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

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 trade. Summary tables for meat production, imports, exports, and consumption provide an overview of the situation. In addition, an explanation of significant changes in production, supply, and demand (PSD) is provided for major meat importing and exporting countries.

Assumptions

BSE: Due to uncertainties as to the length of the bans on trade in ruminants and ruminant products because of the discovery of bovine spongiform encephalopathy (BSE) in the United States and Canada, forecasts for 2005 and 2006 assume a continuation of policies currently in place among U.S. and Canadian trading partners as of October 31, 2005. Due to uncertainties as to the length of the bans on trade in ruminants and ruminant products because of the discovery of BSE in the United States and Canada, forecasts for 2006 assume a continuation of policies currently in place among U.S. trading partners. The recent suspension of beef imports by Japan is assumed to be temporary pending the resolution of importer concerns. U.S. beef exports to South Korea are not forecast pending implementation of import regulations by South Korea.

AI: Forecasts of 2005 and 2006 poultry trade reflect policies currently in place as a result of outbreaks of avian influenza (AI) as of March 10, 2006. Subsequent forecasts will reflect any announced changes.

FMD: Forecasts of 2005 and 2006 reflect the status of the foot and mouth disease (FMD) situation in Brazil as of March 10, 2006 and any resulting trade restrictions. Subsequent forecasts will reflect any announced changes.

Argentina Beef Export Ban: In March 2006, the Argentine government announced a 6-month beef export ban. The forecast took into account exports during the first two months of 2006, continued sales to the EU under the Hilton quota and to Venezuela under a bilateral agreement, shipments of processed/cooked beef, and an eventual resumption in world sales after the 6-month ban is lifted.

Data Modifications

Chile: The FAS Production, Supply and Distribution (PS&D) database now includes Chile for swine and pork. Data is available for 2001-2006 (f).

EU: The March 2006 forecast includes a significant revision to EU turkey and broiler data for 2001 to 2006. The revisions to the EU data are reported in a GAIN report "EU-25 - Poultry and

Products: Review of historical data in relations to the EU 2006 poultry semi-annual" (E36016, 1/31/2006) which can be viewed online at <http://www.fas.usda.gov>.

Technical Notes

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

Totals

Only those countries that make up USDA's official PSD database are reported. This means totals do not encompass all production, consumption, and trade, but rather the sum of those countries reported in USDA's database, which represent the most important players in the world meat PSD situation. In an attempt to capture these major players, the list of countries reported changes periodically. Nevertheless, by capturing the PSDs for all major meat importers and exporters, it is possible to forecast world trends, which are reflected in the text.

PSD Online

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

In addition, please refer to the USDA-FAS Dairy, Livestock and Poultry (DLP) website at: <http://www.fas.usda.gov/dlp/dlp.html> for additional data and analysis, such as *International Agricultural Trade Reports* and *Trade at a Glance*.

FAS Reports from Overseas Offices

The *Livestock and Poultry: World Markets and Trade* circular is based on post reports submitted since January 2006 and on available secondary information. The individual country reports can be obtained on FASOnline at: <http://www.fas.usda.gov/scriptsw/attacherep/default.asp>.

Scheduled reports were received from the following countries:

Country Name	Report Number	Cattle	Beef	Swine	Pork	Report Number	Broiler	Turkey
Argentina	AR6006	x	x					
Australia	AS6004	x	x	x	x			
Brazil	BR6601	x	x	x	x	BR6602	x	x
Canada	CA6004	x	x	x	x			
China	CH6002	x	x	x	x	CH6004	x	
EU	E36014	x	x	x	x	E36015	x	x
Hong Kong	HK6002		x		x	HK6001	x	
Japan	JA6009	x	x	x	x	JA6005	x	
Korea	KS6007	x	x	x	x			
Mexico	MX6010	x	x	x	x	MX6011	x	x
New Zealand	NZ6003	x	x					
Russia	RS6004	x	x	x	x	RS6005	x	x
Saudi Arabia						SA5022	x	
Taiwan	TW6006		x	x	x			
Thailand						TH6012	x	

Additional USDA Resources

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

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