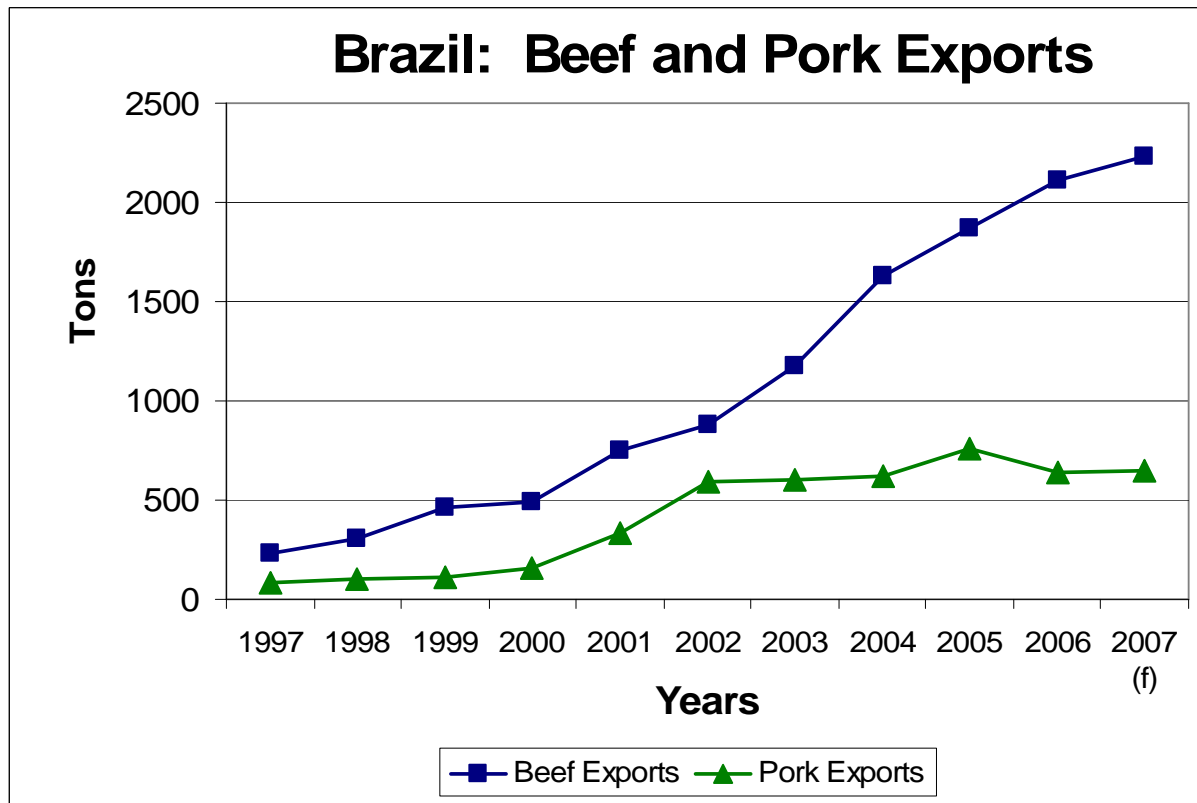




Livestock and Poultry: World Markets and Trade

Brazil's Beef Exports Surge While Pork Languishes



Brazilian beef production and exports continue to expand, despite an outbreak of foot and mouth disease (FMD) in October 2005. Driven by both domestic and foreign demand growth, tight global supplies and high prices, production is forecast to be up 3.4 percent and exports up 6 percent for 2007.

Despite partial disease-related bans by major customers the EU and Russia, Brazilian beef export growth continues and is partially sustained by new opportunities in the Middle East (Egypt, Iran, and Saudi Arabia). Sales to these non-traditional markets have offset a decline in sales to the EU and countered limited access to the Russian market.

Alternatively, expansion in Brazil's pork production is forecast to be 3.5 percent higher for 2007. Exports have been constrained by trade restrictions imposed by the EU and Russia since the FMD outbreak and as a result domestic consumption has increased sharply. There have been some opportunities, growth in Asian markets such as Hong Kong and Singapore.

Note: Data in this document reflects the PSD (<http://www.fas.usda.gov/psdonline>) and WASDE release of April 10, 2007.

Livestock and Poultry: World Markets and Trade

April 2007

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

	2002	2003	2004	2005	2006 (p)	2007 (f)	Percent Change 2006 to 2007
Production							
Beef and Veal /1	51,241	50,095	51,327	52,454	53,838	54,796	1.8%
Pork /1	88,011	90,488	92,801	96,136	99,016	101,867	2.9%
Broiler and Turkey /2 /3	59,173	59,218	60,845	64,013	65,233	65,847	0.9%
Total	198,425	199,801	204,973	212,603	218,087	222,510	2.0%
Consumption							
Beef and Veal /1	50,277	49,049	49,875	50,851	51,725	52,641	1.8%
Pork /1	87,829	90,297	92,139	95,204	98,136	100,794	2.7%
Broiler and Turkey /2 /3	57,634	57,664	58,902	62,149	63,674	64,233	0.9%
Total	195,740	197,010	200,916	208,204	213,535	217,668	1.9%
Imports							
Beef and Veal /1	5,242	5,074	4,891	5,424	5,215	5,409	3.7%
Pork /1	3,871	3,962	4,172	4,393	4,355	4,426	1.6%
Broiler and Turkey /2 /3	4,861	5,025	4,768	5,547	5,508	5,833	5.9%
Total	13,974	14,061	13,831	15,364	15,078	15,668	3.9%
Exports							
Beef and Veal /1	6,274	6,339	6,496	7,091	7,273	7,571	4.1%
Pork /1	3,898	4,255	4,861	5,210	5,325	5,557	4.4%
Broiler and Turkey /2 /3	6,313	6,586	6,635	7,425	7,116	7,483	5.2%
Total	16,485	17,180	17,992	19,726	19,714	20,611	4.6%
U.S. Exports							
Beef and Veal /1	1,110	1,142	209	317	523	585	11.9%
Pork /1	731	779	989	1,209	1,359	1,515	11.5%
Broiler and Turkey /2 /3	2,379	2,451	2,371	2,619	2,633	2,713	3.0%
Total	4,220	4,372	3,569	4,145	4,515	4,813	6.6%
U.S. Market Share (%) of Exports Among Major Traders							
Beef and Veal /1	18%	18%	3%	4%	7%	8%	1%
Pork /1	19%	18%	20%	23%	26%	27%	2%
Broiler and Turkey /2 /3	38%	37%	36%	35%	37%	36%	-1%
Combined	26%	25%	20%	21%	23%	23%	0%

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

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

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

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

3/ Notes regarding publication of revised turkey data is in "Notes to Readers".

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: 2007 Revised Forecast Overview

- **Beef production by major traders for 2007 unchanged in revised forecast at 54.8 million tons**

Whereas beef production forecasts for most major producers (U.S., China and the EU) are about unchanged in the revised 2007 forecast, Brazil is revised up by 2.2 percent to just over 9.3 million tons due to firm domestic demand, expanding exports to non-traditional markets, and improved pasture and profits.

- **Beef exports revised slightly upward; global market supply still tight**

Beef exports by major traders in the revised 2007 forecast are raised nearly 2 percent higher to almost 7.6 million tons attributable primarily to recovering exports by Brazil. The absence of new disease outbreaks by major exporters and no significant changes in the import policies of major importers to eliminate or reduce disease-related trade restrictions has generated a certain degree of stability in the beef market.

However, the global beef market remains characterized by tight supply as a result of those disease-related trade restrictions. Brazil's cases of foot and mouth disease (FMD) have led to partial bans by its major trading partners Russia and the EU-25. Canadian and U.S. beef exports continue to be constrained by bovine spongiform encephalopathy (BSE) related restrictions by key importers.

Brazil: Brazilian 2007 exports are boosted upward in the revised forecast by nearly 13 percent, and as the world's leading beef exporter, such growth has a significant impact on the world market. Faced with disease-related trade constraints in traditional markets such as Russia and the EU-25, growth has been spurred by a diversified product mix and increased sales to non-traditional markets such as the Middle East and North Africa.

United States: The United States continues to struggle in its quest for market access in important Asian markets after the initial discovery of BSE in December 2003. While U.S. beef is no longer banned in South Korea, the two sides have not agreed on trading conditions that would allow U.S. beef exports to South Korea to take place on a commercially viable basis. Thus, the revised forecast assumes that the United States will only export small quantities of beef to South Korea in 2007. Sales to Japan are hindered by a 20 month or younger age restriction and the age-verification process. However, there has been great success within the Western Hemisphere. U.S. beef shipments to Mexico and the Caribbean surpassed the market levels of 2003 by 15 percent in 2006 and will be key destinations for growth in 2007.

Argentina: The revised export forecast 2007 is down from the previous release by nearly 17 percent to 500,000 tons. While Argentina has benefited from Brazil's reduction in sales to the Russian market in recent years, trade will continue to decelerate until export-restricting regulations by the Government of Argentina (GOA) are lifted. Government policies supporting domestic consumption are at the heart of limiting Argentina's export sales. Argentina has the highest per capita consumption of beef in the world, but the country has been recently plagued by economic instability. The erratic economy inspired the GOA to impose a beef export ban in March 2006 in order to lower the domestic price of fresh beef to help curb inflation. In addition to regulating slaughter weights, regulations limit beef exports to 70 percent of the previous year's level. However, the GOA will honor trade agreements and continue to fill the Hilton Quota to the EU-25.

- **Imports: Revised forecast reflects stability**

With no changes in disease-related trade restrictions, there are few significant changes by major importers. Of note, Korea imports are revised higher by 28 percent from the last report. Japanese imports for 2007 were revised downward by over 8 percent in the updated forecast.

South Korea: The upward revision of Korea's beef import forecast reflects projected stability from 2006 despite the absence of U.S. product in the market. Australia will continue to be a key supplier in 2007.

Japan: The primary supplier will likely continue to be Australia where drought conditions have resulted in an acceleration of cattle slaughter and a larger beef supply. To offset the resumption of U.S. beef exports to Japan, Australia is expected to continue its marketing campaigns and will provide an increased amount of grain fed beef.

Russia: The revised estimate assumes a continuity of policies in place as of April 9, 2007 and an increasingly tight global supply and high prices. Russian imports for 2007 are revised 6 percent higher in current forecast but are expected to be below its 2005 peak.

Pork: 2007 Revised Forecast Overview

- **Pork production revised downward mostly due to adjustment in China**

The 2007 production forecast for China is reduced about 3 percent in the revised forecast which is the major driver in a reduced production forecast for the selected countries. Even taking into account these adjustments, China's 2007 production and consumption are both expected to expand a healthy 4 percent over last year's levels.

- **Pork exports by major traders in 2007 elevated over 4 percent in revised forecast**

Revised forecasts for Brazilian, the U.S., and EU-25 exports are due to a more optimistic outlook. However Canadian sales are forecast lower.

Brazil: Exports are not only recovering from last year's steep declines as a result of Russia's FMD-related ban but are now estimated to be up on increased sales to smaller, non-traditional markets such as the Ukraine, Angola and Georgia.

EU-25: The 2007 export estimate was adjusted upwards about 5 percent with more sales to Romania (still considered extra-EU-25 trade). EU pork exports to Romania have increased to 200,000 tons in past years and could reach 250,000 tons in 2007 as EU product will further displace Canadian and U.S. sales which face higher sanitary restrictions and import tariffs as a consequence Romania's EU accession.

Canada: Lower hogs numbers and prospects for increased live hog exports to the United States point to lower pork exports. The Canadian pork industry will have to work through its current difficulties including a strong Canadian dollar, high labor costs and rising feed costs. The relatively expensive Canadian dollar has exacerbated the industry's higher cost structure, which now prevents it from providing hog producers with sufficient price incentives to finish and sell more hogs in Canada, rather than in the United States. Meanwhile, U.S. packers' lower operating costs are helping to pull more and more Canadian swine to the United States, leading to record U.S. hog imports.

United States: Exports continue to climb with strong demand, particularly from stellar growth from Russia and South Korea. In spite of high prices, favorable exchange rates help U.S. pork remain attractive compared to other major exporting countries. Sales have escalated to Russia where higher oil revenues generated income growth that has spurred expansion in overall meat consumption. U.S. exporters have benefited from ongoing Russian health restrictions on Brazilian pork. Despite sluggish sales in 2006, Japan will be a key growth destination for U.S. pork in 2007.

- **Imports by key countries revised upward**

South Korea: The import forecast is up sharply (82 percent) above last year's level, based on assumptions about the beef market. The United States is expected to capture the lion's share of this market expansion as its market share has more than doubled in the past 3 years. While U.S. beef is no longer banned in South Korea, the two sides have not agreed on trading conditions that would allow U.S. beef exports to South Korea to take place on a commercially viable basis. The revised forecast assumes the United States will not export significant quantities of beef to South Korea and consumers will continue their shift to pork. Consumers' preference for pork in a country where it constitutes about 45 percent of daily meat protein consumption helps to drive the boom.

Russia: The estimate has revised 2007 imports upward by 3 percent since the last forecast and about even with 2006. Currently U.S., Canadian and EU-25 product is replacing Brazilian pork which faces partial FMD-related bans. However, any changes to its import policy regarding Brazilian product could not only expand total imports but also revert its purchases back to Brazil. However, if Russia continues to expand pork production at the current rate, it may opt to limit imports even further.

Broiler: 2007 Revised Forecast Overview

- **Broiler production is virtually unchanged at 61.0 million tons**

Brazil and EU-25 estimates are revised higher, while U.S. is lower.

United States: Production is down due to last year's lower prices and higher feed costs dampening returns.

- **Broiler exports revised upward by 2 percent to 6.9 million tons**

Higher exports are estimated for Brazil and the EU-25.

Brazil: Exports are estimated 6 percent higher than the previous forecast at 2.7 million tons based on higher production. Major processors are recovering from last year's losses as foreign demand improves.

EU-25: Exports were revised 12 percent higher in the revised forecast at 770,000 tons based on higher production. France, (major producer and exporter) has been declared avian influenza (AI) free again and consequently, a number of countries have lifted their bans on French imports. Shipments to Romania are expected to shift towards the EU-25, as a consequence of its accession. The United States was Romania's primary supplier, but with the implementation of the EU's sanitary-veterinary restrictions; imports were prohibited from the United States. Currently there are no EU-approved poultry facilities in the United States.

United States: Exports are revised slightly lower at 2.4 million tons based on lower production. Exports to Russia, the major market for U.S. poultry, are expected to slow because of lower import needs due to a surge in investment in the poultry industry. But exports to key markets such as China and Mexico are expected to be strong. China continues to favor U.S. exports over other countries because they are considered AI-safe chicken products. Mexico still prefers U.S. broilers as they are cheaper given the transportation cost advantage.

- **Broiler imports estimate is unchanged at 5.3 million tons**

Lower EU-25 imports are largely offset by higher demand from Mexico.

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

	2003	2004	2005	2006	2007 Oct	2007 Apr
Production						
Brazil	7,385	7,975	8,592	9,020	9,120	9,325
China, Peoples Republic of	6,305	6,759	7,115	7,492	7,910	7,900
EU-25	8,061	8,007	7,848	7,930	7,880	7,860
Argentina	2,800	3,130	3,200	3,100	3,150	3,125
India	1,960	2,130	2,250	2,375	2,500	2,500
Australia	2,073	2,081	2,102	2,183	2,290	2,290
Mexico	1,950	2,099	2,125	2,175	2,200	2,200
Canada	1,190	1,496	1,523	1,425	1,335	1,385
Russian Federation	1,670	1,590	1,525	1,430	1,380	1,380
New Zealand	693	720	705	655	690	715
Others	3,969	4,079	4,151	4,072	4,094	4,054
Total Foreign	38,056	40,066	41,136	41,857	42,549	42,734
United States	12,039	11,261	11,318	11,981	12,168	12,062
Total	50,095	51,327	52,454	53,838	54,717	54,796
Total Dom. Consumption						
EU-25	8,315	8,292	8,194	8,270	8,240	8,240
China, Peoples Republic of	6,274	6,703	7,026	7,395	7,829	7,800
Brazil	6,273	6,400	6,774	6,939	7,180	7,120
Argentina	2,426	2,512	2,443	2,550	2,552	2,630
Mexico	2,308	2,368	2,419	2,509	2,535	2,535
Russian Federation	2,378	2,308	2,503	2,370	2,270	2,325
India	1,521	1,631	1,623	1,625	1,700	1,700
Japan	1,366	1,182	1,200	1,173	1,256	1,210
Canada	1,066	1,057	1,106	1,140	1,059	1,130
Australia	786	747	735	719	755	730
Others	3,996	4,008	4,165	4,205	4,180	4,210
Total Foreign	36,709	37,208	38,188	38,895	39,556	39,630
United States	12,340	12,667	12,663	12,830	13,024	13,011
Total	49,049	49,875	50,851	51,725	52,580	52,641

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

Notes: 1/ Includes buffalo for India.

2/ From 2003, Columbia, Costa Rica, Dominican Republic, El Salvador, Honduras, Nicaragua and Venezuela are no longer included in the cattle and beef PSD.

Data for 2006 is preliminary. Data for 2007 is forecast.

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

	2003	2004	2005	2006	2007 Oct	2007 Apr
Total Imports						
Russian Federation	720	730	993	955	905	960
Japan	851	647	700	692	765	700
EU-25	463	584	600	560	560	580
Mexico	370	287	325	372	375	375
Korea, Republic of	444	218	243	290	230	295
Egypt	123	168	214	225	240	240
Canada	274	111	133	159	160	170
Philippines	129	164	140	142	148	148
Taiwan	98	80	92	101	100	100
Hong Kong	81	81	92	92	93	93
Others	158	152	260	228	265	251
Total Foreign	3,711	3,222	3,792	3,816	3,841	3,912
United States	1,363	1,669	1,632	1,399	1,524	1,497
Total	5,074	4,891	5,424	5,215	5,365	5,409
Total Exports						
Brazil	1,175	1,628	1,867	2,109	1,985	2,235
Australia	1,264	1,394	1,413	1,459	1,495	1,530
India	439	499	627	750	800	800
New Zealand	558	606	589	541	570	600
Uruguay	325	410	487	510	520	520
Argentina	386	623	762	556	600	500
Canada	383	557	551	440	440	420
EU-25	388	358	254	220	200	200
China, Peoples Republic of	43	61	91	99	85	102
Mexico	12	18	31	38	40	40
Others	224	133	102	28	39	39
Total Foreign	5,197	6,287	6,774	6,750	6,774	6,986
United States	1,142	209	317	523	680	585
Total	6,339	6,496	7,091	7,273	7,454	7,571

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

Notes: 1/ Includes buffalo for India.

2/ From 2003, Columbia, Costa Rica, Dominican Republic, El Salvador, Honduras, Nicaragua and Venezuela are no longer included in the cattle and beef PSD.

Data for 2006 is preliminary. Data for 2007 is forecast.

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

	2003	2004	2005	2006	2007 Oct	2007 Apr
Production						
China, Peoples Republic of	45,186	47,016	50,106	52,261	55,800	54,352
EU-25	21,150	21,192	21,101	21,400	21,500	21,450
Brazil	2,560	2,600	2,710	2,830	2,875	2,930
Russian Federation	1,710	1,725	1,735	1,805	1,910	2,000
Vietnam	1,257	1,408	1,602	1,713	1,832	1,832
Canada	1,882	1,936	1,914	1,870	1,860	1,810
Philippines	1,145	1,145	1,175	1,215	1,245	1,245
Japan	1,260	1,272	1,245	1,247	1,235	1,240
Mexico	1,100	1,150	1,195	1,200	1,250	1,190
Korea, Republic of	1,149	1,100	1,036	1,000	1,077	1,040
Others	3,033	2,945	2,925	2,916	2,993	2,983
Total Foreign	81,432	83,489	86,744	89,457	93,577	92,072
United States	9,056	9,312	9,392	9,559	9,809	9,795
Total	90,488	92,801	96,136	99,016	103,386	101,867
Total Dom. Consumption						
China, Peoples Republic of	45,054	46,648	49,703	51,809	55,324	53,878
EU-25	20,043	19,773	19,768	20,015	20,122	20,000
Russian Federation	2,420	2,337	2,476	2,637	2,715	2,830
Japan	2,373	2,562	2,507	2,450	2,501	2,508
Brazil	1,957	1,979	1,949	2,191	2,305	2,280
Vietnam	1,244	1,386	1,583	1,698	1,815	1,815
Mexico	1,423	1,556	1,556	1,580	1,640	1,580
Korea, Republic of	1,294	1,331	1,305	1,402	1,310	1,450
Philippines	1,167	1,169	1,198	1,240	1,272	1,272
Taiwan	947	959	950	932	956	945
Others	3,559	3,622	3,540	3,542	3,540	3,535
Total Foreign	81,481	83,322	86,535	89,496	93,500	92,093
United States	8,816	8,817	8,669	8,640	8,874	8,701
Total	90,297	92,139	95,204	98,136	102,374	100,794

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

Data for 2006 is preliminary. Data for 2007 is forecast.

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

	2003	2004	2005	2006	2007 Oct	2007 Apr
Total Imports						
Japan	1,133	1,302	1,339	1,146	1,228	1,225
Russian Federation	725	629	765	852	825	850
Mexico	371	458	420	446	460	460
Korea, Republic of	153	220	328	390	220	400
Hong Kong	302	332	305	310	317	317
Romania	133	179	263	288	275	275
Canada	91	105	140	145	145	130
Australia	67	77	99	90	99	99
China, Peoples Republic of	265	169	99	91	34	86
Ukraine	13	64	62	45	45	45
Others	171	138	109	103	120	117
Total Foreign	3,424	3,673	3,929	3,906	3,768	4,004
United States	538	499	464	449	467	422
Total	3,962	4,172	4,393	4,355	4,235	4,426
Total Exports						
EU-25	1,234	1,463	1,354	1,410	1,400	1,470
Canada	975	972	1,084	1,080	1,120	1,050
Brazil	603	621	761	639	570	650
China, Peoples Republic of	397	537	502	543	510	560
Chile	80	103	128	124	135	135
Mexico	48	52	59	66	70	70
Australia	74	59	53	56	54	54
Russian Federation	15	17	24	20	20	20
Vietnam	12	22	19	15	18	18
Korea, Republic of	17	10	5	12	15	15
Others	21	16	12	1	0	0
Total Foreign	3,476	3,872	4,001	3,966	3,912	4,042
United States	779	989	1,209	1,359	1,402	1,515
Total	4,255	4,861	5,210	5,325	5,314	5,557

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

Data for 2006 is preliminary. Data for 2007 is forecast.

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

	2003	2004	2005	2006	2007 Oct	2007 Apr
Production						
China, Peoples Republic of	9,898	9,998	10,200	10,350	10,520	10,520
Brazil	7,645	8,408	9,350	9,355	9,670	9,795
EU-25	7,512	7,627	7,804	7,625	7,530	7,700
Mexico	2,290	2,389	2,498	2,576	2,724	2,641
India	1,500	1,650	1,900	2,000	2,200	2,200
Russian Federation	560	650	900	1,180	1,260	1,300
Argentina	750	910	1,030	1,210	1,290	1,290
Japan	1,127	1,124	1,166	1,195	1,185	1,185
Thailand	1,340	900	950	1,100	1,100	1,100
Canada	929	946	977	970	980	980
Others	6,035	6,064	6,516	6,758	6,290	6,290
Total Foreign	39,586	40,666	43,291	44,319	44,749	45,001
United States	14,696	15,286	15,870	16,043	16,413	15,964
Total	54,282	55,952	59,161	60,362	61,162	60,965
Total Dom. Consumption						
China, Peoples Republic of	9,963	9,931	10,088	10,371	10,585	10,620
EU-25	7,312	7,280	7,596	7,380	7,490	7,530
Brazil	5,742	5,992	6,612	6,853	7,120	7,095
Mexico	2,627	2,713	2,871	3,005	3,148	3,100
Russian Federation	1,680	1,675	2,139	2,382	2,400	2,480
India	1,496	1,648	1,899	2,000	2,200	2,200
Japan	1,841	1,713	1,880	1,908	1,915	1,915
Argentina	719	845	949	1,124	1,184	1,184
South Africa, Republic of	928	956	1,010	1,062	1,075	1,075
Saudi Arabia	904	889	1,011	972	1,019	1,019
Others	7,151	7,429	7,949	8,141	7,707	7,745
Total Foreign	40,363	41,071	44,004	45,198	45,843	45,963
United States	12,540	13,080	13,430	13,754	13,901	13,554
Total	52,903	54,151	57,434	58,952	59,744	59,517

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

Notes: 1/ Chicken paws are not included in the trade data.

2/ From 2003 onward, Columbia and Egypt are are dropped from the broiler PSD.

3/ From 2007 onward, Australia is dropped from the broiler PSD.

Data for 2006 is preliminary. Data for 2007 is forecast.

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

	2003	2004	2005	2006	2007 Oct	2007 Apr
Total Imports						
Russian Federation	1,081	1,016	1,225	1,189	1,150	1,190
Japan	695	582	748	740	725	725
EU-25	588	466	549	525	645	600
Saudi Arabia	452	429	484	434	470	470
Mexico	338	326	374	430	424	460
China, Peoples Republic of	453	174	219	343	430	430
Hong Kong	154	244	222	234	237	237
South Africa, Republic of	125	154	189	225	225	225
United Arab Emirates	154	158	167	137	165	165
Venezuela	6	25	100	120	150	150
Others	573	798	798	661	700	700
Total Foreign	4,619	4,372	5,075	5,038	5,321	5,352
United States	6	12	15	21	16	22
Total	4,625	4,384	5,090	5,059	5,337	5,374
Total Exports						
Brazil	1,903	2,416	2,739	2,502	2,550	2,700
EU-25	788	813	757	770	685	770
China, Peoples Republic of	388	241	331	322	365	330
Thailand	485	200	240	261	280	280
Argentina	39	66	84	90	110	110
Canada	76	74	101	95	95	95
Kuwait	3	24	97	38	75	75
United Arab Emirates	40	15	20	10	30	30
Saudi Arabia	20	10	10	10	10	10
Romania	5	7	7	3	8	8
Others	44	39	47	35	21	22
Total Foreign	3,791	3,905	4,433	4,136	4,229	4,430
United States	2,232	2,170	2,360	2,391	2,508	2,452
Total	6,023	6,075	6,793	6,527	6,737	6,882

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

Notes: 1/ Chicken paws are not included in the trade data.

2/ From 2003 onward, Columbia and Egypt are are dropped from the broiler PSD.

3/ From 2007 onward, Australia is dropped from the broiler PSD.

Data for 2006 is preliminary. Data for 2007 is forecast.

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

	2003	2004	2005	2006	2007 Oct	2007 Apr
Total Cattle Beg. Stks						
India	286,079	283,103	282,500	282,300	282,000	282,000
Brazil	161,463	165,492	169,567	173,816	180,103	180,300
China, Peoples Republic of	130,848	134,672	137,818	141,575	145,349	145,336
EU-25	88,719	87,478	86,412	85,804	85,150	85,150
Argentina	50,869	50,768	50,167	50,166	50,766	51,164
Australia	27,870	26,640	27,270	27,782	28,600	28,560
Mexico	29,224	28,437	27,572	26,949	26,644	26,644
Russian Federation	23,500	22,285	21,100	19,850	18,695	19,000
Canada	13,488	14,653	15,063	14,830	14,400	14,315
South Africa, Republic of	13,635	13,540	13,510	13,790	14,200	14,200
Others	67,894	64,987	61,593	60,760	59,939	60,087
Total Foreign	893,589	892,055	892,572	897,622	905,846	906,756
United States	96,100	94,888	95,438	96,702	98,400	97,003
Total	989,689	986,943	988,010	994,324	1,004,246	1,003,759
Production (Calf Crop)						
China, Peoples Republic of	51,654	54,162	57,020	60,100	63,300	63,300
India	55,100	55,800	56,500	57,000	57,000	57,000
Brazil	44,887	46,234	48,327	51,797	53,490	54,450
EU-25	31,834	31,025	30,436	29,900	29,600	29,700
Argentina	14,000	15,000	15,400	15,500	14,700	15,000
Australia	8,823	9,970	9,643	10,284	10,490	9,930
Mexico	7,200	7,300	7,500	7,950	8,200	8,200
Russian Federation	8,845	8,400	7,950	7,505	7,110	7,270
Canada	5,788	5,542	5,625	5,514	5,000	5,300
New Zealand	4,475	4,450	4,460	4,470	4,480	4,480
Others	21,552	20,762	20,316	19,930	19,926	20,106
Total Foreign	254,158	258,645	263,177	269,950	273,296	274,736
United States	37,903	37,505	37,575	37,567	38,000	37,500
Total	292,061	296,150	300,752	307,517	311,296	312,236

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

Notes: 1/ Includes buffalo for India.

2/ From 2003, Columbia, Costa Rica, Dominican Republic, El Salvador, Honduras, Nicaragua and Venezuela are no longer included in the cattle and beef PSD.

Data for 2006 is preliminary. Data for 2007 is forecast.

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

	2003	2004	2005	2006	2007 Oct	2007 Apr
Total Imports						
South Africa, Republic of	130	145	210	210	140	140
Mexico	53	68	85	72	125	100
Russian Federation	10	7	14	58	60	60
EU-25	65	68	63	68	70	50
Canada	63	19	21	38	25	45
Philippines	100	55	25	25	40	40
Japan	23	21	25	26	30	28
China, Peoples Republic of	50	132	50	15	22	10
Romania	1	2	5	5	6	6
Bulgaria	0	0	2	3	3	3
Others	197	14	53	30	3	4
Total Foreign	692	531	553	550	524	486
United States	1,752	1,371	1,816	2,289	2,200	2,200
Total	2,444	1,902	2,369	2,839	2,724	2,686
Total Exports						
Mexico	1,240	1,375	1,259	1,275	1,400	1,300
Canada	506	0	559	1,032	900	950
Australia	774	638	573	637	640	640
Brazil	3	16	113	246	180	280
EU-25	475	435	323	290	260	200
Romania	152	172	155	150	155	155
China, Peoples Republic of	51	59	54	54	51	54
Bulgaria	25	25	51	30	32	32
New Zealand	18	69	50	32	40	30
Uruguay	12	41	10	20	20	20
Others	217	94	13	13	16	14
Total Foreign	3,473	2,924	3,160	3,779	3,694	3,675
United States	99	16	22	49	60	60
Total	3,572	2,940	3,182	3,828	3,754	3,735

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

Notes: 1/ Includes buffalo for India.

2/ From 2003, Columbia, Costa Rica, Dominican Republic, El Salvador, Honduras, Nicaragua and Venezuela are no longer included in the cattle and beef PSD.

Data for 2006 is preliminary. Data for 2007 is forecast.

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

	2003	2004	2005	2006	2007 Oct	2007 Apr
Total Beginning Stocks						
China, Peoples Republic of	462,915	466,017	481,891	503,348	519,052	523,752
EU-25	154,311	152,793	151,143	151,673	152,000	152,000
Brazil	32,655	32,081	32,323	32,938	33,147	33,147
Vietnam	23,167	24,885	26,144	27,435	28,369	28,369
Russian Federation	17,000	17,200	16,500	16,550	17,610	17,380
Canada	14,672	14,623	14,619	14,730	14,250	14,329
Philippines	12,218	12,518	12,139	13,041	13,693	13,693
Mexico	10,549	10,668	10,303	10,125	10,250	10,250
Japan	9,725	9,724	9,600	9,620	9,600	9,610
Korea, Republic of	8,110	8,367	8,044	8,098	8,304	8,382
Others	27,418	25,101	23,959	24,875	25,695	25,685
Total Foreign	772,740	773,977	786,665	812,433	831,970	836,597
United States	59,554	60,444	60,975	61,449	61,400	62,149
Total	832,294	834,421	847,640	873,882	893,370	898,746
Production (Pig Crop)						
China, Peoples Republic of	597,814	636,742	685,399	735,000	750,000	750,000
EU-25	254,218	249,245	250,486	253,700	252,800	254,300
Vietnam	29,020	33,330	37,544	39,791	42,226	42,226
Russian Federation	35,000	35,000	35,500	37,000	39,300	41,000
Brazil	29,716	30,015	32,295	33,304	32,040	34,530
Canada	31,414	33,163	33,413	33,193	33,000	32,775
Philippines	23,100	22,750	24,640	25,270	25,900	25,900
Japan	17,250	17,160	17,000	16,950	16,850	16,850
Mexico	15,300	15,350	15,500	15,700	15,800	15,800
Korea, Republic of	15,856	14,796	13,817	13,807	14,200	14,346
Others	34,295	34,441	35,395	35,903	37,223	36,723
Total Foreign	1,082,983	1,121,992	1,180,989	1,239,618	1,259,339	1,264,450
United States	101,491	102,781	103,965	105,259	107,825	105,994
Total	1,184,474	1,224,773	1,284,954	1,344,877	1,367,164	1,370,444

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

Data for 2006 is preliminary. Data for 2007 is forecast.

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

	2003	2004	2005	2006	2007 Oct	2007 Apr
Total Imports						
Russian Federation	33	130	84	382	250	400
Mexico	184	190	181	196	225	225
Romania	116	122	171	175	210	210
Ukraine	0	0	139	35	30	30
Bulgaria	1	1	15	10	10	10
China, Peoples Republic of	2	2	3	2	3	2
Korea, Republic of	1	1	2	2	1	2
Canada	4	3	1	1	1	1
EU-25	0	1	1	3	1	1
Vietnam	0	0	1	0	1	1
Others	1	0	1	0	0	0
Total Foreign	342	450	599	806	732	882
United States	7,438	8,506	8,192	8,763	8,800	9,350
Total	7,780	8,956	8,791	9,569	9,532	10,232
Total Exports						
Canada	7,442	8,511	8,215	8,777	8,800	9,350
China, Peoples Republic of	1,887	1,973	1,769	1,723	1,600	1,690
EU-25	271	446	763	1,250	800	1,400
Bulgaria	0	0	2	3	3	3
Others	3	4	3	1	1	0
Total Foreign	9,603	10,934	10,752	11,754	11,204	12,443
United States	170	174	154	165	160	170
Total	9,773	11,108	10,906	11,919	11,364	12,613

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

Data for 2006 is preliminary. Data for 2007 is forecast.

Beef: Per Capita Consumption Summary Selected Countries

Kilograms Per Person

	2002	2003	2004	2005	2006 (p)	2007 (f)
Beef						
Argentina	61.6	62.6	64.2	61.8	63.9	65.3
Australia	35.6	39.8	37.5	36.6	35.5	35.7
Brazil	35.8	34.5	34.8	36.4	36.9	37.5
Canada	31.1	33.1	32.5	33.6	34.4	33.8
China, Peoples Republic of	4.5	4.9	5.2	5.4	5.6	5.9
European Union 1/	18.0	18.3	18.2	17.9	18.1	18.0
Egypt	8.4	7.5	8.2	9.3	8.7	8.6
Hong Kong	12.6	13.8	13.9	15.4	15.3	15.3
India 2/	1.3	1.4	1.5	1.5	1.5	1.5
Japan	10.4	10.7	9.3	9.4	9.2	9.5
Korea, South	12.7	12.6	9.6	9.0	10.0	10.2
Mexico	23.5	22.3	22.6	22.8	23.4	23.3
New Zealand	31.5	37.5	31.5	31.2	30.7	30.4
Philippines	4.1	4.1	4.5	4.0	4.0	4.0
Russian Federation	16.9	16.4	16.0	17.5	16.6	16.3
South Africa	14.3	13.9	15.0	15.8	15.5	15.6
Taiwan	4.2	4.6	3.7	4.3	4.6	4.5
Turkey	9.5	9.4	9.2	9.0	8.8	8.7
Ukraine	11.2	8.6	10.8	11.2	11.9	11.5
United States	44.3	42.5	43.2	42.8	43.0	43.2
Uruguay	49.4	37.0	39.7	35.4	39.3	40.6

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. 2/ Includes buffalo.

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

Pork: Per Capita Consumption Summary Selected Countries

Kilograms Per Person

	2002	2003	2004	2005	2006 (p)	2007 (f)
Pork						
Australia	19.2	20.8	20.8	21.4	21.0	20.6
Brazil	11.0	10.8	10.7	10.5	11.6	12.0
Canada	33.6	31.2	32.8	29.5	28.5	26.5
Chile	18.9	18.2	17.1	17.7	19.0	19.4
China, Peoples Republic of	33.6	34.9	35.9	38.0	39.4	40.8
European Union 1/	43.4	44.0	43.3	43.3	43.7	43.6
Hong Kong	62.4	65.6	71.9	65.7	65.7	65.3
Japan	18.7	18.7	20.1	19.7	19.2	19.7
Korea, South	25.0	26.8	27.5	26.8	28.7	29.6
Mexico	13.2	13.7	14.8	14.7	14.7	14.5
Philippines	13.7	13.8	13.6	13.6	13.9	14.0
Russian Federation	16.9	16.7	16.2	17.3	18.5	19.9
Taiwan	43.1	41.9	42.2	41.5	41.8	40.8
Ukraine	12.5	13.1	12.8	11.6	11.3	12.4
United States	30.2	30.4	30.1	29.3	29.0	28.9
Vietnam	14.9	15.4	16.9	19.2	20.3	21.5

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

Broiler Meat: Per Capita Consumption Summary Selected Countries

Kilograms Per Person

	2002	2003	2004	2005	2006 (p)	2007 (f)
Broiler Meat						
Argentina	16.1	18.6	21.6	24.0	28.2	29.4
Brazil	32.6	31.5	32.5	35.5	36.4	37.3
Canada	29.0	29.0	29.6	29.4	29.8	29.8
China, Peoples Republic of	7.4	7.7	7.6	7.7	7.9	8.0
European Union 1/	16.3	16.1	16.0	16.6	16.1	16.4
Hong Kong	33.3	31.1	37.6	38.8	38.8	38.5
India	1.4	1.4	1.5	1.8	1.8	2.0
Indonesia	2.7	3.1	2.6	2.7	2.8	2.9
Japan	14.4	14.5	13.5	14.8	15.0	15.0
Korea, South	11.0	10.7	9.6	12.2	12.9	13.3
Kuwait	41.7	49.5	54.5	42.8	43.0	41.9
Malaysia	36.4	37.7	37.2	38.5	38.3	38.0
Mexico	23.7	25.3	25.8	27.0	28.0	28.5
Philippines	7.7	7.7	7.8	7.7	7.5	7.5
Romania	10.1	11.8	14.1	16.5	15.3	15.6
Russian Federation	11.7	11.6	11.6	14.9	16.7	17.4
Saudi Arabia	33.3	35.9	34.5	38.3	36.0	36.9
South Africa	18.7	20.9	21.5	22.8	24.0	24.4
Taiwan	28.1	27.8	28.5	29.3	29.5	29.5
Thailand	13.5	12.1	10.2	12.3	12.5	13.2
Ukraine	3.3	4.5	10.1	9.1	9.7	11.8
United Arab Emirates	51.9	59.2	70.5	71.0	60.3	66.2
United States	42.7	43.2	44.6	45.4	46.1	45.0
Venezuela	13.2	12.4	13.6	17.7	19.0	21.3

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 meat trade. Summary tables for meat production, imports, exports, and consumption provide an overview of the situation.

Data Modifications

- **China (Pork):** Chinese pork import data from 2005 onward is now based on partner country trade data rather than official Chinese import statistics. Chinese pork exports will continue to be based on official Chinese export data.
- **China (Broiler):** Both Chinese import and export data from 2005 onward is now based on official Chinese trade data.
- **Kuwait:** The broiler data series (imports and exports only) for 2004 was revised due new information regarding transshipments.
- **Ukraine:** The beef data series for 1996 was revised due to data error.

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 2007 assume a continuation of policies currently in place among U.S. and Canadian trading partners as of April 9, 2007.
- **AI:** Forecasts of 2007 poultry trade reflect policies currently in place as a result of outbreaks of avian influenza (AI) as of April 9, 2007. Subsequent forecasts will reflect any announced changes.
- **FMD:** Forecasts of 2007 reflect the status of the foot and mouth disease (FMD) situation in Brazil as of April 9, 2007 and any resulting trade restrictions. Subsequent forecasts will reflect any announced changes.

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.

EU-25: For this circular, trade with Bulgaria and Romania is still considered extra-EU-25 trade because this circular is covering the EU-25 market, even if Bulgaria and Romania have joined the EU-25 on January 1, 2007 to form the EU-27. However, even if trade with these latest two new EU member states is still considered extra-EU-25 trade, the circular does consider the expected impacts on the EU-25 market from the latest EU enlargement. An EU-27 data series for livestock, meat and poultry will be available as a part of the next PSD and circular release in November 2007.

Turkey Meat: The turkey meat data series is only updated once a year (October/November). Any turkey data included in this release has not been revised since October 2006. For current U.S. turkey data please review the latest WASDE data at <http://www.usda.gov/oce/commodity/wasde/index.htm>.

Per Capita Consumption: The Per Capita Consumption table reflects FAS derived statistics. These are developed using “Domestic Consumption” data in the PSD and Census population data. Census population data is available in Excel format from USDA-Economic Research Service at <http://www.ers.usda.gov/Data/Macroeconomics/>.

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/psdonline/psdHome.aspx>.

FAS Reports from Overseas Offices

The *Livestock and Poultry: World Markets and Trade* circular is based on post reports submitted since January 2007 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 and voluntary reports were received from the following countries. An “x” indicates that the USDA-FAS office in that country provides a report and data for that commodity.

Argentina		x	x					
Australia		x	x					
Brazil		x	x	x	x		x	
Canada		x	x	x	x			
China		x	x	x	x		x	
European Union		x	x	x	x		x	x
Japan		x	x	x	x			
Korea		x	x	x	x		x	
Mexico		x	x	x	x		x	
New Zealand		x	x					
Russian Federation		x	x	x	x		x	
Taiwan			x	x	x			
Thailand							x	

Additional Resources

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.

Additional information on international trade of agricultural products can be found at: <http://www.fas.usda.gov>.

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/>.

Future Releases and Contact Information

The U.S. Department of Agriculture's (USDA) Foreign Agricultural Service (FAS) has the primary responsibility for USDA's international activities. Its staff of more than 700 employees is stationed in Washington, DC, and in about 80 countries around the world. The agency works to expand and maintain exports for U.S. agricultural, fish, and forest products; supports international economic development and trade capacity building, and improve the sanitary and phytosanitary (SPS) system to facilitate trade.

FAS recently reorganized to meet new challenges and opportunities. More information on the reorganization is available at <http://www.fas.usda.gov/fasreorg.asp>.

Please visit http://www.fas.usda.gov/dlp/livestock_poultry.asp to view archived and future releases of "Livestock and Poultry: World Markets and Trade". The next release of this circular will be in November 2007 and will include a 2008 forecast.

Questions regarding this forecast as well as world trade of livestock and poultry products may be directed to the following staff:

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