United States
Department of
Agriculture

Foreign
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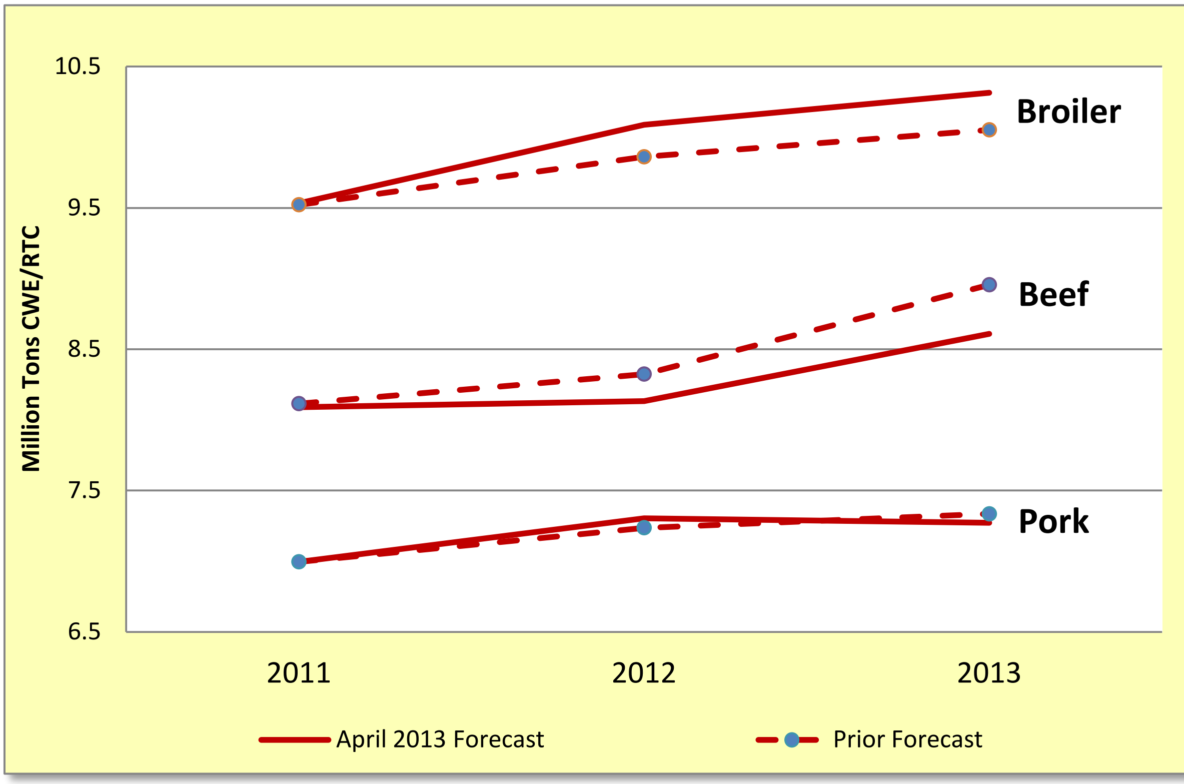
Service

April 2013

Livestock and Poultry: World Markets and Trade

World Exports 2013 Revised: Broiler Meat Higher, Beef Lower and Pork Unchanged



Global beef production for 2013 is virtually unchanged from the October estimate at 57.5 million tons as a sharp downward revision for India is offset by increases for a number of other countries. Although still forecast at a record, global exports are dropped 355,000 tons to 8.6 million driven by a more reticent outlook for India which exceeds upward revisions for Brazil and Australia. Import demand in East Asia, particularly in China and Hong Kong, is stronger while other key markets are weaker on lower consumption (Mexico) or increased production (South Korea).

Global pork production is revised upward 2.7 million tons to a record 107.4 million on expected lower feed prices. Exports are reduced 90,000 tons to 7.2 million on downward revisions to the EU, the United States, and Brazil.

Global broiler meat production is revised upward by 1.1 million tons to 84.6 million with the majority of growth provided by the United States, Thailand and Russia. World exports are revised up 262,000 tons to 10.3 million bolstered by higher exports from the United States, Turkey, and Ukraine.

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April 2013

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

	2008	2009	2010	2011	2012 (p)	2013 (f)	Percent Change 2012 to 2013
Production							
Beef and Veal /1	58,367	57,180	57,303	57,058	57,257	57,527	0.5%
Pork /1	97,923	100,567	102,968	102,015	105,519	107,412	1.8%
Broiler and Turkey /2	78,138	78,630	83,105	86,119	88,272	90,049	2.0%
Total	234,428	236,377	243,376	245,192	251,048	254,988	1.6%
Consumption							
Beef and Veal /1	57,501	56,209	56,151	55,367	55,759	56,044	0.5%
Pork /1	98,025	100,424	102,770	101,610	104,929	106,978	2.0%
Broiler & Turkey /2	77,005	77,555	81,796	84,568	86,385	88,410	2.3%
Total	232,531	234,188	240,717	241,545	247,073	251,432	1.8%
Imports							
Beef and Veal /1	6,773	6,550	6,619	6,421	6,674	7,077	6.0%
Pork /1	6,260	5,540	5,886	6,606	6,904	6,844	-0.9%
Broiler and Turkey /2	8,012	7,705	8,191	8,606	8,990	9,234	2.7%
Total	21,045	19,795	20,696	21,633	22,568	23,155	2.6%
Exports							
Beef and Veal /1	7,605	7,458	7,822	8,090	8,134	8,601	5.7%
Pork /1	6,220	5,682	6,081	6,997	7,305	7,245	-0.8%
Broiler and Turkey /2	9,003	8,970	9,455	10,162	10,755	10,963	1.9%
Total	22,828	22,110	23,358	25,249	26,194	26,809	2.3%
U.S. Exports							
Beef and Veal /1	905	878	1,043	1,263	1,114	1,100	-1.3%
Pork /1	2,110	1,857	1,916	2,354	2,442	2,361	-3.3%
Broiler and Turkey /2	3,463	3,335	3,333	3,481	3,639	3,579	-1.6%
Total	6,478	6,070	6,292	7,098	7,195	7,040	-2.2%
U.S. Market Share (%) of Exports Among Major Traders							
Beef and Veal /1	12%	12%	13%	16%	14%	13%	
Pork /1	34%	33%	32%	34%	33%	33%	
Broiler and Turkey /2	38%	37%	35%	34%	34%	33%	
Combined	28%	27%	27%	28%	27%	26%	

Notes:

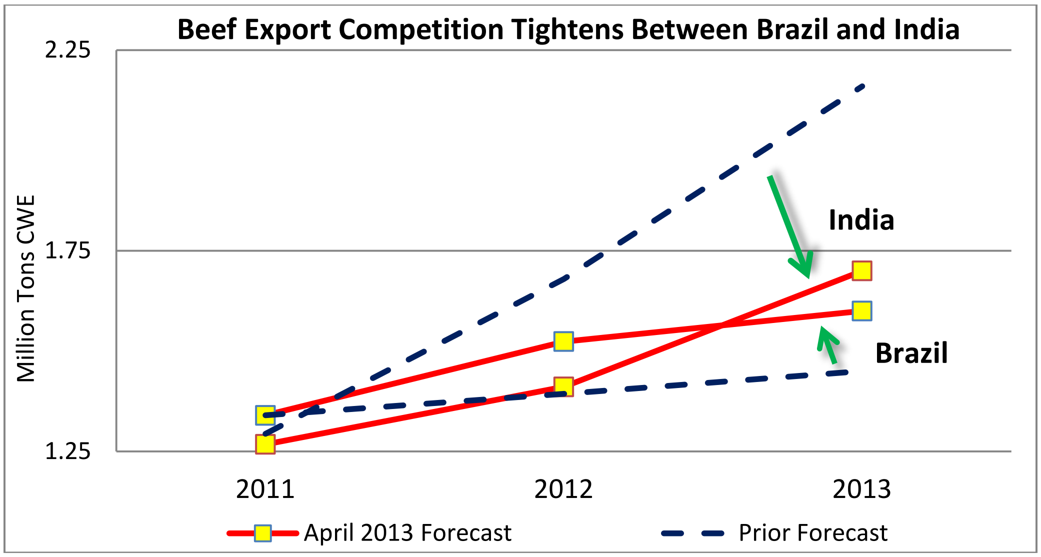
1/ 1,000 Metric Tons (Carcass Weight Equivalent)

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: 2013 REVISED FROM OCTOBER

Global beef production is virtually unchanged at 57.5 million tons as a sharp downward revision for India is offset by increases for a number of other countries. Although still forecast at a record, global exports are dropped 355,000 tons to 8.6 million driven by a more reticent outlook for India which exceeds upward revisions for Brazil and Australia. Import demand in East Asia, particularly in China and Hong Kong, is stronger while other key markets are weaker on lower consumption (Mexico) or increased production (South Korea).



United States

Production is revised 113,000 tons higher to nearly 11.4 million on heavier slaughter weight expectations which more than offset a reduction in slaughter. However, the outlook is constrained by the availability of slaughter cattle due to declining calf crops, prior liquidation spurred by drought, and elevated feed prices. The forecasts for imports and exports are virtually unchanged. Improved market access in Japan and Hong Kong partnered with strong demand in other key markets are expected to offset restrictions by Russia.

Brazil

Production is revised 125,000 tons higher to a record 9.5 million. Despite a shift of some pasture to soybeans and corn during the current season, herd expansion is bolstered by government support, genetic improvements, better pasture management, sustained cattle prices, excellent pasture conditions, greater supplies of slaughter cattle and strong international demand.

Exports are revised 150,000 tons higher to nearly 1.6 million as stable competitive prices and ample supplies boost shipments. A 16 percent devaluation of the Real over the past year will help Brazilian competitiveness. Thus despite the atypical BSE case in the state of Parana, only made public in late 2012, restrictions by Saudi Arabia, Japan, South Africa, South Korea, China and Taiwan (combined less than 5 percent of exports) will be more than offset by demand from other markets. Increased opportunities for shipments to Russia will likely be generated due to gradual Brazilian plant relistings as well as Russian restrictions on competing U.S. beef.

EU

Production is revised 35,000 tons higher to 7.7 million. With a slight increase in consumption, the trade forecast remains unchanged.

China

Production is virtually unchanged at nearly 5.6 million tons. Despite restrictions on Brazil, imports are forecast 141,000 tons higher to a record 175,000 as demand remains firm and foreign products are becoming price-competitive due to a stronger Yuan.

Argentina

Production is revised 20,000 tons upward to 2.8 million on increased slaughter as higher than expected production costs squeeze profit margins. However, exports remain unchanged at 180,000 tons constrained by government export regulations, elevated cattle prices and competition from other South American suppliers (Uruguay and Paraguay) in key markets such as Chile, Russia and Israel.

Australia

Production is revised upward 25,000 tons to a record 2.2 million on increased slaughter due to a return to drier conditions, rising input costs and higher rural debt. With ample supplies, competitive prices and robust international demand, exports are revised 55,000 tons higher to a record of nearly 1.5 million. Higher than previously forecast demand by China and greater shipments to the United States are expected to more than offset declines in key markets (Japan and South Korea).

Mexico

Production is virtually unchanged at 1.8 million tons as the sector continues to be challenged by low volumes of slaughter ready cattle due to drought-impacted pasture, high feed prices and elevated live cattle exports. As higher beef prices depress consumption across all income levels, imports are revised 90,000 tons lower to 260,000. Exports remain unchanged.

Live cattle exports are revised 35,000 head lower to 1.3 million as smaller calf crops constrain supplies and Turkey closed its market to shipments from Mexico.

Russia

Production is revised 45,000 tons upward to nearly 1.4 million on higher than expected slaughter caused by higher feed prices as well as rising weights due to improved herd management. Imports are revised 45,000 tons lower to 1.0 million due to data revisions.

Canada

Production is revised 55,000 tons lower to 1.0 million, a 17-year low. Revisions to prior calf crops have negatively impacted cattle available for slaughter. Tighter supplies generate a downward revision of exports by 85,000 tons to 330,000, also a 17-year low even compared to 2003 (its first BSE case). Tight supplies and stable demand also push imports 25,000 tons higher to 315,000 tons.

Live cattle exports are forecast 175,000 head higher to 875,000 due to the erosion of the feed cost advantage vis-à-vis the United States as well as operational changes at one plant (XL Foods, Alberta) and the closure of another (Levinoff-Colbex, Quebec).

Japan

Production is revised 10,000 tons higher to 505,000 on stronger demand. Expanded market access for U.S. beef and anticipated strong demand for grain-fed beef is expected to boost imports and consumption. Imports are revised 10,000 tons higher to 760,000 with U.S. market share expected to increase at the expense of Australia.

Paraguay

Strong foreign demand, particularly by Russia, drives production 35,000 tons higher to 465,000 and exports 25,000 tons higher to 275,000.

South Korea

Production is revised 35,000 tons higher to 336,000 on increased slaughter due changed profit margins on revised forecasts for live cattle prices (lower) and feed prices (higher). Consumption is expected to decline slightly, constrained by an abundant supply of low-priced domestic pork and a sluggish economy. As a result, imports are revised 35,000 tons lower to 370,000 tons.

Saudi Arabia

With production unchanged, imports are revised 40,000 tons lower to 165,000 as BSE-related restrictions on Brazil constrain importable supplies.

Beef and Veal Selected Countries Summary

1,000 Metric Tons (Carcass Weight Equivalent)

	2009	2010	2011	2012	2013 Oct	2013 Apr
Production						
Brazil	8,935	9,115	9,030	9,307	9,375	9,500
EU-27	7,913	8,048	8,057	7,765	7,700	7,735
China	5,764	5,600	5,550	5,540	5,580	5,590
India	2,514	2,842	3,244	3,460	4,168	3,800
Argentina	3,380	2,620	2,530	2,620	2,780	2,800
Australia	2,106	2,129	2,129	2,152	2,185	2,210
Mexico	1,705	1,745	1,804	1,820	1,795	1,800
Pakistan	1,441	1,470	1,435	1,400	1,400	1,400
Russia	1,460	1,435	1,360	1,380	1,345	1,390
Canada	1,252	1,273	1,154	1,075	1,055	1,000
Others	8,819	8,980	8,777	8,883	8,869	8,916
Total Foreign	45,289	45,257	45,070	45,402	46,252	46,141
United States	11,891	12,046	11,988	11,855	11,273	11,386
Total	57,180	57,303	57,058	57,257	57,525	57,527
Total Dom. Consumption						
Brazil	7,374	7,592	7,730	7,845	7,985	7,960
EU-27	8,263	8,147	7,975	7,806	7,750	7,785
China	5,749	5,589	5,524	5,597	5,571	5,725
Argentina	2,761	2,346	2,320	2,458	2,602	2,622
Russia	2,505	2,487	2,343	2,395	2,416	2,416
India	1,905	1,925	1,976	2,049	2,008	2,100
Mexico	1,976	1,938	1,921	1,835	1,920	1,835
Pakistan	1,414	1,436	1,402	1,367	1,367	1,367
Japan	1,211	1,225	1,237	1,255	1,248	1,270
Canada	1,016	1,000	1,009	1,012	930	1,010
Others	9,796	10,428	10,279	10,396	10,408	10,478
Total Foreign	43,970	44,113	43,716	44,015	44,205	44,568
United States	12,239	12,038	11,651	11,744	11,361	11,476
Total	56,209	56,151	55,367	55,759	55,566	56,044

Notes: May contain meat of other bovines.

Beef and Veal Selected Countries Summary

1,000 Metric Tons (Carcass Weight Equivalent)

	2009	2010	2011	2012	2013 Oct	2013 Apr
Total Imports						
Russia	1,053	1,057	991	1,023	1,080	1,035
Japan	697	721	745	737	750	760
Korea, South	315	366	431	370	405	370
EU-27	498	437	367	348	350	350
Hong Kong	154	154	152	241	200	325
Canada	247	243	282	301	290	315
Mexico	322	296	265	215	350	260
Egypt	180	260	217	250	225	225
Venezuela	250	143	195	220	235	220
Chile	166	190	180	187	190	190
Others	1,477	1,710	1,663	1,775	1,714	1,864
Total Foreign	5,359	5,577	5,488	5,667	5,789	5,914
United States	1,191	1,042	933	1,007	1,188	1,163
Total	6,550	6,619	6,421	6,674	6,977	7,077
Total Exports						
India	609	917	1,268	1,411	2,160	1,700
Brazil	1,596	1,558	1,340	1,524	1,450	1,600
Australia	1,364	1,368	1,410	1,407	1,410	1,465
New Zealand	514	530	503	517	529	505
Uruguay	376	347	320	355	375	370
Canada	480	523	426	335	415	330
EU-27	148	338	449	307	300	300
Paraguay	243	283	197	251	250	275
Mexico	51	103	148	200	225	225
Argentina	621	277	213	164	180	180
Others	578	535	553	549	551	551
Total Foreign	6,580	6,779	6,827	7,020	7,845	7,501
United States	878	1,043	1,263	1,114	1,111	1,100
Total	7,458	7,822	8,090	8,134	8,956	8,601

Notes: May contain meat of other bovines.

Cattle Selected Countries Summary

(in 1,000 head)

	2009	2010	2011	2012	2013 Oct	2013 Apr
Total Cattle Beg. Stks						
India	309,900	316,400	320,800	323,700	327,300	327,100
Brazil	179,540	185,159	190,925	197,550	203,715	203,273
China	105,722	105,430	104,822	104,346	104,152	104,203
EU-27	88,837	88,300	87,437	86,196	85,320	85,750
Argentina	54,260	49,057	48,156	49,597	51,097	51,195
Colombia	30,775	30,845	30,971	30,910	30,610	30,576
Australia	27,321	27,906	27,550	28,506	29,710	29,879
Russia	21,040	20,677	19,970	19,695	19,430	19,458
Mexico	22,666	22,192	21,456	20,090	18,570	18,521
Canada	13,030	12,670	12,155	12,215	12,545	12,275
Others	75,989	57,478	56,108	55,717	55,498	55,734
Total Foreign	929,080	916,114	920,350	928,522	937,947	937,964
United States	94,521	93,881	92,682	90,769	89,700	89,300
Total	1,023,601	1,009,995	1,013,032	1,019,291	1,027,647	1,027,264
Production (Calf Crop)						
India	61,000	61,700	62,500	63,400	64,400	64,300
Brazil	49,150	49,200	49,445	49,690	50,185	50,185
China	42,576	41,500	40,900	40,950	41,365	41,550
EU-27	30,100	30,000	29,600	29,250	29,150	29,000
Argentina	12,000	11,600	13,100	13,800	14,200	14,200
Australia	10,025	8,842	9,618	10,000	10,000	9,825
Russia	7,389	6,952	6,800	6,900	6,900	6,950
Mexico	6,875	7,000	6,900	6,800	6,600	6,600
Colombia	5,300	5,200	5,150	5,125	5,000	5,000
New Zealand	4,523	4,530	4,786	4,945	4,943	4,840
Others	21,317	15,982	16,000	15,724	15,720	15,645
Total Foreign	250,255	242,506	244,799	246,584	248,463	248,095
United States	35,939	35,695	35,313	34,279	34,150	33,800
Total	286,194	278,201	280,112	280,863	282,613	281,895

Notes: 1/ May contain other bovines.
2/ From 2010, Nicaragua and South Africa are excluded.

Cattle Selected Countries Summary

(in 1,000 head)

	2009	2010	2011	2012	2013 Oct	2013 Apr
Total Imports						
Venezuela	407	612	335	616	500	525
Russia	49	38	94	138	110	140
China	47	83	103	115	120	120
Egypt	45	140	70	95	100	100
Canada	54	56	73	56	65	55
Mexico	20	25	16	10	25	16
Japan	16	16	12	14	15	13
Ukraine	2	1	3	3	3	3
Belarus	0	1	1	2	1	2
Others	171	69	7	0	0	0
Total Foreign	811	1,041	714	1,049	939	974
United States	2,002	2,284	2,107	2,256	2,000	2,150
Total	2,813	3,325	2,821	3,305	2,939	3,124
Total Exports						
Mexico	980	1,261	1,435	1,539	1,350	1,315
Canada	1,067	1,065	696	825	700	875
EU-27	403	623	812	769	800	750
Brazil	530	655	405	512	590	590
Australia	954	875	695	620	725	580
Colombia	5	24	61	299	250	250
Uruguay	207	207	213	75	60	60
New Zealand	13	27	34	42	47	47
China	29	28	29	28	29	27
Russia	1	1	5	6	1	5
Others	113	1	5	5	3	4
Total Foreign	4,302	4,767	4,390	4,720	4,555	4,503
United States	58	91	194	191	225	210
Total	4,360	4,858	4,584	4,911	4,780	4,713

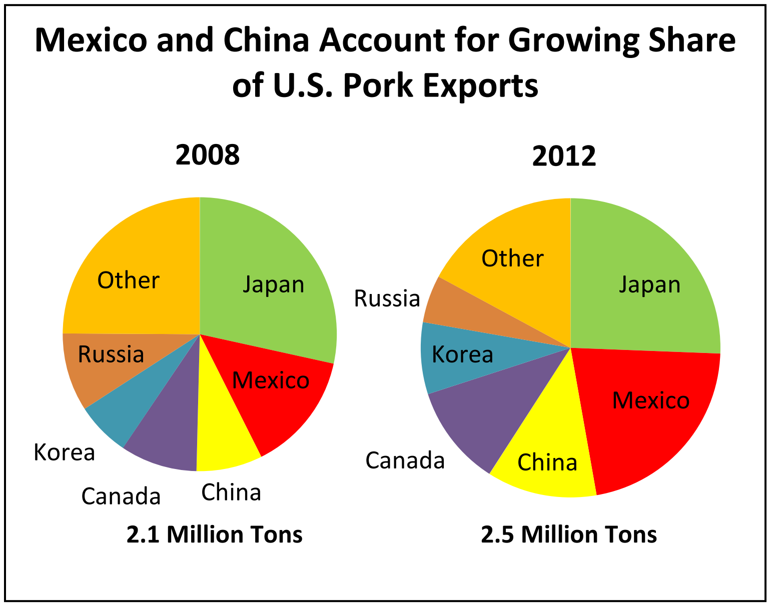
Notes: 1/ May contain other bovines.
2/ From 2010, Nicaragua and South Africa are excluded.

PORK: 2013 REVISED FROM OCTOBER

Global pork production is revised upward 2.7 million tons to a record 107.4 million on expected lower feed prices. Exports are reduced 90,000 tons to 7.2 million on downward revisions to the EU, the United States, and Brazil.

United States

Production is raised 229,000 tons to 10.7 million largely on expected lower feed grain prices and more slaughter. Slaughter hog supply is greater because of smaller declines to the swine breeding herd and a larger pig crop, as producers weathered 2012 high feed grain prices. Adding to hog supplies, swine imports are raised 100,000 head to 5.6 million with expectations that a more normal corn crop will boost demand for Canadian feeder pigs.



Exports are lowered 84,000 tons to 2.4 million as lower sales to Russia and soft Japanese demand offset greater exports to Mexico and Canada.

Swine exports, which consist almost entirely of breeding stock, are raised 20,000 head to 60,000 due to growing demand from China, Mexico, and Russia. A recent protocol with the EU now allows U.S. hogs to transit through to Russia.

China

Production is raised by 1.8 million tons to a record 53.8 million mainly on greater slaughter hog supplies and heavier carcass weights. The pig crop is raised 3 percent due to better disease management practices which limited losses during the winter season. The government's decision to extend sow production subsidies through June is expected to help boost pig production.

Imports are lowered 115,000 tons to 700,000 on higher domestic production and lower pork prices.

Swine exports are raised 90,000 head to 1.7 million as lower priced hogs meet stronger demand from Hong Kong and Macau.

EU

Pork production is lowered 75,000 tons to 22.6 million due to a lower pig crop resulting from the newly implemented sow housing requirements. Exports are lowered 115,000 tons to 2.3 million despite market opportunities because of tight exportable supplies.

Brazil

Production is raised 40,000 tons to 3.4 million on improved hog prices and more stable feed costs from record soybean and corn crops. However, exports are lowered 25,000 tons to 620,000 because of Ukraine's restrictions on imports from Brazil, which was their top market last year. Sales will likely be re-directed to other markets like Russia, Angola, Georgia, and Moldova. Russia's elimination of preferential tariff rates is not expected to limit sales.

Canada

Production is raised 20,000 tons to 1.8 million as the hog sector copes with high feed costs and the producers' fragile financial situations. Most remained in business and continued to produce as usual on expectations of improved hog prices. Consequentially, sow beginning were higher and the pig crop is raised 350,000 head to 28.2 million. Swine exports are raised 100,000 head to 5.7 million as U.S. demand for feeder pigs is expected to remain strong.

Pork exports are boosted 35,000 tons to 1.2 million on greater shipments to Mexico and Russia. New Russian ractopamine restrictions may slow sales in the near term and keep them below 2012 levels.

Russia

Production is up 75,000 tons to 2.2 million despite higher feed prices. The hog industry continues to expand, aided by government support for large, modern facilities. However, imports are also raised 80,000 tons to 1.1 million, given their competitive prices. Trade restrictions on U.S. pork will mean more market share available for other suppliers.

Swine imports are cut by more than half to 250,000 head with ongoing restrictions on EU swine due to the Schmallenberg virus (a ruminant disease).

Japan

Production is raised 40,000 tons to 1.3 million on lower expected feed grain prices. The pig crop is revised upward 4 percent as the national sow inventory is rebuilt, particularly in the Miyazaki prefecture (a major hog producing region that was hard hit by an outbreak of Foot and Mouth Disease (FMD) several years ago).

Imports are lowered 30,000 tons to 1.2 million based on the depreciation of the yen, larger domestic supplies, greater consumption of U.S. beef due to improved market access, and increased competition from poultry meat because of competitive prices.

Mexico

Production is forecast 60,000 tons higher at 1.3 million, as more sows were retained last year. However, imports are also raised 80,000 tons to a record 770,000 based on competitive import prices and strong demand, as pork substitutes for higher-priced beef. Swine imports are doubled as industry expansion results in strong breeding stock demand.

South Korea

Production is raised 190,000 tons to a record 1.2 million. The swine industry recovery following the 2011 FMD outbreak resulted in an oversupply of hogs. In an attempt to stop prices from falling below production costs, the government procured 64,000 head in the first 2 months of 2013. Producer groups and the government have also agreed to: 1) a voluntary 20 percent reduction in sow stocks with failure to comply resulting in reduced government support, 2) reduced slaughter weights, 3) an increase in the ratio of domestic to imported pork in processed meat and 4) a national bacon sale for 2 weeks in March to encourage consumption. As a result of these large domestic supplies, consumption is up to record levels while imports are slashed 105,000 tons to 400,000.

Ukraine

Production is lowered 20,000 tons to 600,000. However, imports are unchanged at 200,000 tons. A ban on imports from Brazil (Ukraine's largest supplier) is expected to keep trade below record 2012 levels.

Pork Selected Countries Summary

1,000 Metric Tons (Carcass Weight Equivalent)

	2009	2010	2011	2012	2013 Oct	2013 Apr
Production						
China	48,905	51,070	49,500	52,350	52,000	53,800
EU-27	22,434	22,571	22,866	22,630	22,625	22,550
Brazil	3,130	3,195	3,227	3,330	3,330	3,370
Russia	1,844	1,920	2,000	2,075	2,075	2,150
Vietnam	1,910	1,930	1,960	2,000	2,025	2,025
Canada	1,788	1,771	1,797	1,820	1,775	1,795
Philippines	1,234	1,247	1,275	1,382	1,275	1,420
Japan	1,310	1,292	1,267	1,297	1,265	1,305
Mexico	1,162	1,175	1,202	1,227	1,210	1,270
Korea, South	1,062	1,110	837	1,086	1,050	1,240
Taiwan	857	845	865	865	860	860
Chile	514	498	528	584	590	620
Ukraine	527	631	704	600	620	600
Belarus	325	327	340	347	360	360
Argentina	289	279	301	331	295	350
Others	2,834	2,921	3,015	3,041	2,915	3,028
Total Foreign	90,125	92,782	91,684	94,965	94,270	96,743
United States	10,442	10,186	10,331	10,554	10,440	10,669
Total	100,567	102,968	102,015	105,519	104,710	107,412
Total Dom. Consumption						
China	48,823	51,157	50,004	52,725	52,615	54,225
EU-27	21,057	20,842	20,680	20,423	20,270	20,310
Russia	2,719	2,835	2,971	3,145	3,075	3,230
Brazil	2,423	2,577	2,644	2,670	2,686	2,751
Japan	2,467	2,488	2,522	2,557	2,531	2,533
Vietnam	1,891	1,912	1,940	1,980	2,005	2,005
Mexico	1,770	1,784	1,710	1,838	1,790	1,930
Korea, South	1,480	1,539	1,487	1,546	1,555	1,628
Philippines	1,344	1,405	1,419	1,518	1,403	1,556
Taiwan	925	901	919	893	892	891
Canada	853	802	785	820	810	825
Ukraine	713	776	806	852	800	775
Hong Kong	486	467	558	544	573	555
Australia	464	482	482	514	541	520
Chile	369	385	408	430	439	460
Others	3,627	3,765	3,935	4,036	3,899	4,125
Total Foreign	91,411	94,117	93,270	96,491	95,884	98,319
United States	9,013	8,653	8,340	8,438	8,369	8,659
Total	100,424	102,770	101,610	104,929	104,253	106,978

Pork Selected Countries Summary

1,000 Metric Tons (Carcass Weight Equivalent)

	2009	2010	2011	2012	2013 Oct	2013 Apr
Total Imports						
Japan	1,138	1,198	1,254	1,259	1,260	1,230
Russia	876	916	971	1,070	1,000	1,080
Mexico	678	687	594	706	690	770
China	270	415	758	730	815	700
Hong Kong	369	347	432	414	445	420
Korea, South	390	382	640	502	505	400
Canada	180	183	204	241	225	245
Australia	176	183	175	194	210	210
Ukraine	186	146	119	281	200	200
Belarus	30	86	117	151	125	155
Philippines	111	159	145	138	130	138
Singapore	97	104	97	105	100	115
Angola	61	58	78	87	82	100
Croatia	60	56	58	64	65	65
Colombia	10	11	22	35	50	45
Others	530	565	578	564	569	608
Total Foreign	5,162	5,496	6,242	6,541	6,471	6,481
United States	378	390	364	363	363	363
Total	5,540	5,886	6,606	6,904	6,834	6,844
Total Exports						
EU-27	1,416	1,754	2,205	2,226	2,375	2,260
Canada	1,123	1,159	1,197	1,243	1,195	1,230
Brazil	707	619	584	661	645	620
China	232	278	244	235	200	250
Chile	152	130	139	180	175	190
Belarus	31	62	85	104	90	110
Mexico	70	78	86	95	110	110
Australia	40	41	41	36	35	35
Ukraine	0	1	17	29	20	25
Vietnam	21	19	20	20	20	20
Others	33	24	25	34	25	34
Total Foreign	3,825	4,165	4,643	4,863	4,890	4,884
United States	1,857	1,916	2,354	2,442	2,445	2,361
Total	5,682	6,081	6,997	7,305	7,335	7,245

Swine Selected Countries Summary

(in 1,000 head)

	2009	2010	2011	2012	2013 Oct	2013 Apr
Total Beginning Stocks						
China	462,913	469,960	477,115	473,340	466,645	474,920
EU-27	153,067	152,198	150,773	148,545	148,450	147,000
Brazil	33,892	35,122	36,652	38,336	39,276	38,578
Russia	16,165	17,236	17,231	17,258	17,300	18,793
Canada	12,700	12,465	12,690	12,785	12,813	12,720
Korea, South	8,223	8,721	8,449	8,171	9,700	9,916
Mexico	9,310	8,979	9,007	9,276	9,499	9,510
Japan	9,899	10,000	9,768	9,735	9,700	9,500
Ukraine	6,526	7,577	7,960	7,373	7,400	7,516
Belarus	3,704	3,782	3,887	3,989	4,100	4,228
Others	2,412	2,302	2,289	2,285	2,300	2,159
Total Foreign	718,811	728,342	735,821	731,093	727,183	734,840
United States	67,148	64,887	64,925	66,361	65,200	66,413
Total	785,959	793,229	800,746	797,454	792,383	801,253
Production (Pig Crop)						
China	655,620	677,800	660,622	697,800	690,000	710,558
EU-27	257,700	262,200	264,250	260,500	268,000	261,000
Brazil	35,890	36,970	37,750	37,700	37,900	38,100
Russia	28,798	29,472	30,650	33,300	32,645	34,500
Canada	29,410	28,688	28,594	28,306	27,850	28,200
Japan	17,700	17,500	17,000	17,050	16,890	17,500
Mexico	15,966	16,200	16,350	16,500	16,475	16,800
Korea, South	14,916	14,923	13,308	16,340	14,470	16,000
Ukraine	7,400	8,176	8,109	7,400	7,700	7,500
Belarus	4,950	5,025	5,075	5,275	5,326	5,450
Others	4,390	4,604	4,659	4,602	4,680	4,600
Total Foreign	1,072,740	1,101,558	1,086,367	1,124,773	1,121,936	1,140,208
United States	114,542	113,685	115,838	117,724	115,830	118,944
Total	1,187,282	1,215,243	1,202,205	1,242,497	1,237,766	1,259,152

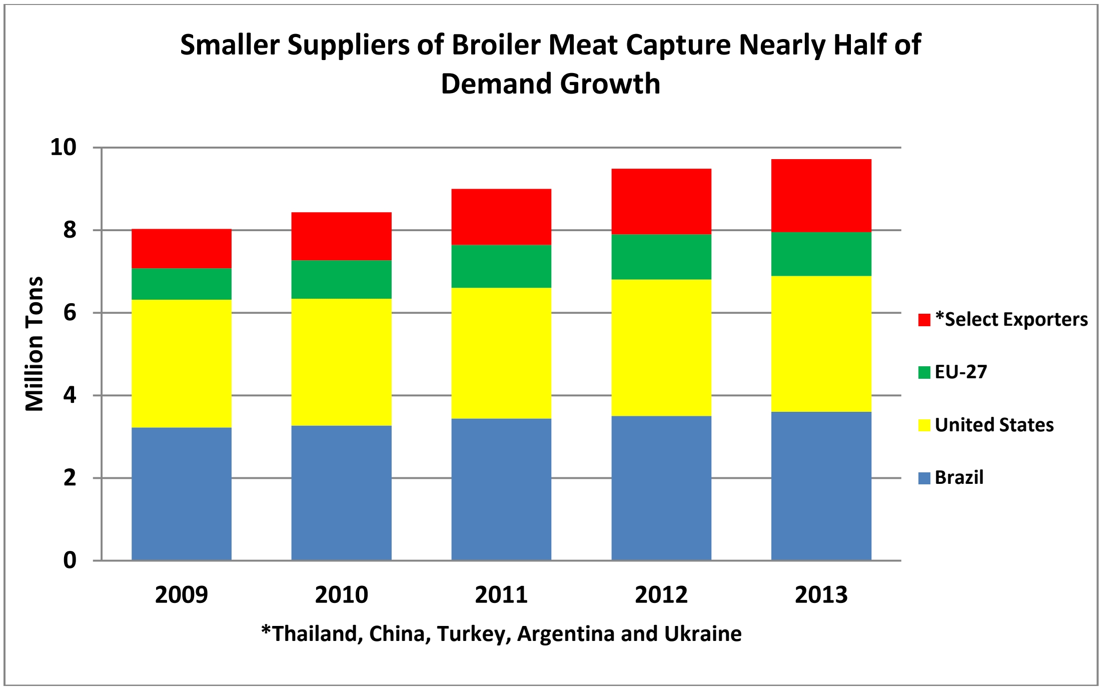
Swine Selected Countries Summary

(in 1,000 head)

	2009	2010	2011	2012	2013 Oct	2013 Apr
Total Imports						
Russia	1,205	783	782	334	600	250
Ukraine	77	90	112	225	230	250
Mexico	7	9	12	31	16	32
China	6	6	15	18	22	22
Korea, South	0	2	16	11	10	10
Belarus	3	2	5	5	2	5
Canada	3	3	3	2	3	3
EU-27	3	2	1	2	2	2
Brazil	0	5	2	1	1	1
Japan	1	1	1	1	1	1
Others	0	0	0	0	0	0
Total Foreign	1,305	903	949	630	887	576
United States	6,365	5,749	5,795	5,652	5,530	5,630
Total	7,670	6,652	6,744	6,282	6,417	6,206
Total Exports						
Canada	6,376	5,761	5,821	5,672	5,550	5,650
China	1,695	1,748	1,563	1,640	1,610	1,700
EU-27	2,211	1,628	1,586	1,240	1,400	1,200
Belarus	3	54	113	103	115	110
Brazil	1	1	6	2	1	1
Ukraine	0	1	1	1	1	1
Others	1	1	0	0	0	0
Total Foreign	10,287	9,194	9,090	8,658	8,677	8,662
United States	21	15	30	54	40	60
Total	10,308	9,209	9,120	8,712	8,717	8,722

BROILER MEAT: 2013 REVISED FROM OCTOBER

Global broiler meat production is revised upward by 1.1 million tons to 84.6 million with the majority of growth provided by the United States, Thailand and Russia. World exports are revised up 262,000 tons to 10.3 million bolstered by higher exports from the United States, Turkey, and Ukraine.



United States

Production is boosted 671,000 tons to a record 17.0 million as a result of better prices and higher weights. Exports are raised 114,000 tons to 3.3 million driven by escalating demand in Mexico and Cuba, coupled with Russia's removal of preferential tariffs for a number of counties including Brazil.

Brazil

Production is lowered 170,000 tons to 12.8 million as a result of shrinking domestic demand. However, exports are raised 25,000 tons to 3.6 million due to greater demand in East Asia and the Middle East.

EU

Production is down 30,000 tons to 9.6 million as declines in France and the United Kingdom outweigh expansion mainly in Germany and Poland. Exports are lowered by 60,000 tons to 1.1 million due to a reduction of available exportable supplies, as a result of the bankruptcy of Doux (France's leading producer) and lower restitutions.

China
Production is decreased by 50,000 tons to 14.1 million due to tighter margins on higher feed costs and lower prices. Exports are unchanged at 400,000 tons due to price competitive supplies from Brazil and the United States in some markets, but expanding demand in other markets.

Russia
Production is raised 100,000 tons to 3.0 million as increased government supports and stronger demand (fueled by a rising preference for value-added products and elevated red meat prices) moderate higher costs. Exports are up 25,000 tons to 80,000 as a result of preferential market access to Kazakhstan due to the Customs Union. Imports are higher by 60,000 tons to 580,000 due to greater demand for low-cost sources of protein.

Mexico
Production is increased 25,000 tons to 3.0 million despite higher costs associated with feed and bio-security measures in response to the avian influenza (AI) outbreak. Exports are cut 4,000 tons to 8,000 due to the AI outbreak. Imports remain unchanged at 640,000 tons as a result of stable per capita consumption.

Argentina
Production remains unchanged at 2.0 million tons, while exports are up 30,000 tons to 315,000 in response to larger demand from Venezuela, China and Chile.

Turkey
Production remains unchanged at 1.7 million tons, although exports are raised 70,000 tons to 330,000 as a result of burgeoning demand from Iraq and other Middle-East markets.

Thailand
Production is boosted 110,000 tons to 1.6 million as a result of higher domestic and foreign demand. Exports are up 20,000 tons to 600,000 with greater market access to European and East Asian markets.

Ukraine
Production is raised 83,000 tons to 903,000 as new production facilities come into operation. Exports jump 70,000 tons to 120,000 in response to growing demand from Kazakhstan and Russia.

Broiler Meat Selected Countries Summary

1,000 Metric Tons (Ready to Cook Equivalent)

	2009	2010	2011	2012	2013 Oct	2013 Apr
Production						
China	12,100	12,550	13,200	13,700	14,100	14,050
Brazil	11,023	12,312	12,863	12,645	13,005	12,835
EU-27	8,756	9,202	9,320	9,510	9,580	9,550
India	2,550	2,650	2,900	3,160	3,420	3,420
Mexico	2,781	2,822	2,906	2,958	2,950	2,975
Russia	2,060	2,310	2,575	2,830	2,850	2,950
Argentina	1,500	1,680	1,770	1,936	2,022	2,022
Turkey	1,250	1,430	1,614	1,687	1,700	1,700
Thailand	1,200	1,280	1,350	1,550	1,450	1,560
Indonesia	1,409	1,465	1,515	1,540	1,550	1,550
Others	13,048	13,629	14,104	14,637	14,575	14,986
Total Foreign	57,677	61,330	64,117	66,153	67,202	67,598
United States	15,935	16,563	16,694	16,621	16,341	17,012
Total	73,612	77,893	80,811	82,774	83,543	84,610
Total Dom. Consumption						
China	12,210	12,457	13,015	13,543	13,950	13,920
Brazil	7,802	9,041	9,422	9,139	9,424	9,230
EU-27	8,710	8,954	9,014	9,138	9,210	9,210
Mexico	3,264	3,364	3,473	3,569	3,578	3,607
Russia	2,982	2,957	3,013	3,321	3,315	3,450
India	2,549	2,648	2,891	3,151	3,411	3,411
Japan	1,979	2,079	2,104	2,219	2,130	2,185
South Africa	1,443	1,524	1,685	1,756	1,738	1,800
Argentina	1,327	1,475	1,556	1,659	1,746	1,710
Indonesia	1,412	1,465	1,515	1,540	1,550	1,550
Others	16,021	17,341	18,211	18,832	18,973	19,378
Total Foreign	59,699	63,305	65,899	67,867	69,025	69,451
United States	12,946	13,470	13,664	13,342	13,225	13,804
Total	72,645	76,775	79,563	81,209	82,250	83,255

Notes:
1/ Chicken paws are excluded.

Broiler Meat Selected Countries Summary

1,000 Metric Tons (Ready to Cook Equivalent)

	2009	2010	2011	2012	2013 Oct	2013 Apr
Total Imports						
Japan	645	788	895	876	840	860
Saudi Arabia	605	681	789	799	750	807
EU-27	719	681	731	718	750	720
Mexico	492	549	578	616	640	640
Iraq	397	522	598	612	610	624
Russia	929	656	463	560	520	580
South Africa	206	240	325	371	380	395
Angola	161	239	287	301	340	330
Hong Kong	253	295	410	300	380	310
China	401	286	238	254	250	270
Others	2,485	2,848	2,907	3,170	3,148	3,295
Total Foreign	7,293	7,785	8,221	8,577	8,608	8,831
United States	45	48	49	51	47	51
Total	7,338	7,833	8,270	8,628	8,655	8,882
Total Exports						
Brazil	3,222	3,272	3,443	3,508	3,582	3,607
EU-27	765	929	1,037	1,090	1,120	1,060
Thailand	379	432	467	538	580	600
China	291	379	423	411	400	400
Turkey	86	110	206	285	260	330
Argentina	178	214	224	281	285	315
Canada	147	147	143	140	150	145
Ukraine	18	32	43	75	50	120
Belarus	21	38	74	105	110	110
Chile	87	79	90	93	95	96
Others	146	173	220	259	268	265
Total Foreign	5,340	5,805	6,370	6,785	6,900	7,048
United States	3,093	3,069	3,162	3,303	3,152	3,266
Total	8,433	8,874	9,532	10,088	10,052	10,314

Notes:
1/ Chicken paws are excluded.

Turkey Meat Selected Countries Summary

1,000 Metric Tons (Ready to Cook Equivalent)

	2008	2009	2010	2011	2012	2013 Oct
Production						
EU-27	1,830	1,795	1,946	1,950	2,020	2,030
Brazil	465	466	485	489	510	520
Canada	180	167	159	160	165	165
Russia	39	31	70	90	100	105
Mexico	15	11	11	13	14	13
South Africa	7	8	8	8	8	8
China	5	5	6	6	6	6
Total Foreign	2,541	2,483	2,685	2,716	2,823	2,847
United States	2,796	2,535	2,527	2,592	2,675	2,592
Total	5,337	5,018	5,212	5,308	5,498	5,439
Total Dom. Consumption						
EU-27	1,835	1,801	1,911	1,885	1,951	1,960
Brazil	261	302	327	348	355	360
Mexico	212	155	163	164	183	167
Canada	163	151	143	145	148	149
Russia	107	72	105	117	120	125
South Africa	38	34	34	32	40	48
China	50	32	32	40	47	47
Total Foreign	2,666	2,547	2,715	2,731	2,844	2,856
United States	2,434	2,363	2,306	2,274	2,332	2,299
Total	5,100	4,910	5,021	5,005	5,176	5,155

Turkey Meat Selected Countries Summary

1,000 Metric Tons (Ready to Cook Equivalent)

	2008	2009	2010	2011	2012	2013 Oct
Total Imports						
Mexico	197	144	153	152	170	155
EU-27	125	112	99	82	81	80
China	45	27	26	34	41	41
South Africa	31	26	26	24	32	40
Russia	68	41	35	27	20	20
Canada	9	8	8	7	8	7
Others	0	0	0	0	0	0
Total Foreign	475	358	347	326	352	343
United States	6	9	11	10	10	9
Total	481	367	358	336	362	352
Total Exports						
Brazil	204	164	158	141	155	160
EU-27	120	106	134	147	150	150
Canada	25	25	24	22	25	25
Mexico	0	0	1	1	1	1
Others	0	0	0	0	0	0
Total Foreign	349	295	317	311	331	336
United States	306	242	264	319	336	313
Total	655	537	581	630	667	649

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 Prior to 2012

Cattle/Beef:

- The cattle PSDs for the following countries are revised for particular years during the 2005-2011 period due to official trade data revisions: Belarus
- The beef PSDs for the following countries are revised for particularly years during the 1999-2011 period on additional production data available: Angola, Albania, Belarus, Costa Rica, El Salvador, Peru, South Africa, Switzerland
- The beef PSDs for the following countries are revised for particular years during the 1997-2011 period on additional trade data available: Angola, Belarus, Congo, Macedonia, Oman, Paraguay, Russia, Saudi Arabia

Swine/Pork:

- The pork PSDs for the following countries are revised for particular years during the 2001-2011 period due to additional trade or production data: Angola, Armenia, Australia, Belarus, Canada, Colombia, Congo, Cuba, Dominican Republic, Democratic Republic of Congo, Ecuador, EU, Georgia, Ghana, Guatemala, Honduras, Hong Kong, Japan, Kazakhstan, Kyrgyzstan, Moldova, New Zealand, Norway, Panama, Philippines, Russia, and Serbia.
- The swine PSDs for the following countries are revised for particular years during the 2010-2011 period due to additional trade or production data: Australia, Canada, EU, Japan, and Russia.

Broiler Meat:

- The broiler meat PSDs for the following countries are revised for particular years during the 2006-2011 period on additional production data available: Chile, Colombia, Saudi Arabia, Macedonia
- The broiler meat PSDs for the following countries are revised for particular years during the 2008-2011 period on additional trade data available: Argentina, Gabon, Russia, Georgia, Jamaica, Kazakhstan, Macedonia, United Arab Emirates

Turkey Meat:

- The turkey meat forecast is NOT revised from the October release and summary tables reflect data previously published.

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, 2013.
- **Other Diseases (AI, H1N1, FMD):** Forecast reflects policies currently in place as a result of outbreaks as of April 10, 2013.

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.

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 2013 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 2013.

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