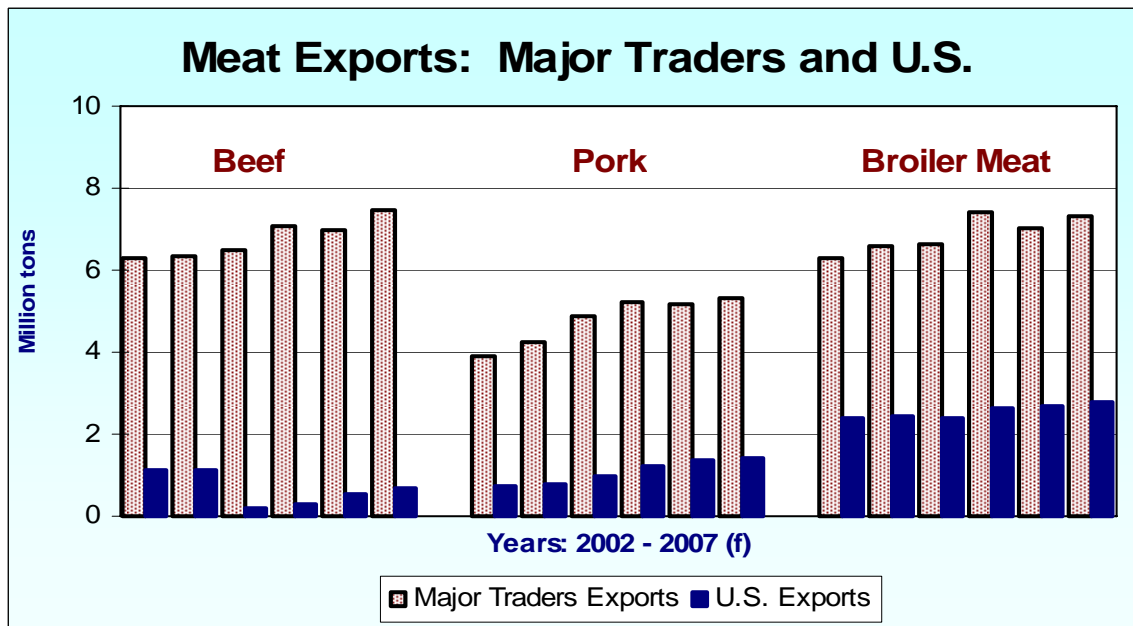




Livestock and Poultry: World Markets and Trade

2007: Trade of Red Meats and Poultry Forecast Stronger Among Major Traders as Disease-related Trade Restrictions Decline

Red meat and poultry trade by selected countries will remain strong in 2007. Exports by major traders of beef, pork and broiler meat will increase by 6.5 percent, 2.6 percent, and 4.1 percent respectively. Trade is expected to continue to recover from animal disease outbreaks (bovine spongiform encephalopathy (BSE), foot and mouth disease (FMD), and avian influenza (AI)) and their resulting trade impacts.



Source: *Production, Supply and Distribution Database, FAS*

United States Exports

Pork: U.S. pork exports are forecast to continue strong growth in 2007 reaching a record 1.4 million tons. Forecast to nearly double from 2002 to 2007, U.S. pork exports have benefited from its reputation as a quality product, competitive prices, favorable exchange rate, and growing international demand.

Poultry: U.S. broiler meat exports are forecast to increase 2.2 percent in 2007 to 2.5 million tons. U.S. turkey exports are also forecast to experience strong growth in 2007 rising 7.9 percent to 261,000 tons.

Beef: U.S. recovery of several key beef markets due to the lifting of BSE restrictions will bolster total beef exports by major traders. In addition to recovering more of its share of the beef trade, U.S. beef exports are forecast to reach 680,000 tons in 2007. In 2003, the United States accounted for 18 percent of beef exports by major traders. After declining to 3 percent in 2004, the United States is forecast to account for 9 percent in 2007.

Note: Data in this document reflects the PSD (<http://www.fas.usda.gov/psdonline>) and WASDE release of October 12, 2006.

Livestock and Poultry: World Markets and Trade

October 2006

Contents

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

2006 Forecast Overviews

- Beef
- Pork
- Poultry

Summary Tables

- Beef Summary Table
- Pork Summary Table
- Broiler Meat Summary Table
- Turkey Meat Summary Table
- Cattle Summary Table
- Swine Summary Table

Per Capita Consumption Summary Selected Countries

- Beef
- Pork
- Poultry: Broiler & Turkey

Notes to Readersmezough

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	52,374	53,511	54,717	2.3%
Pork /1	88,011	90,488	92,801	96,227	99,776	103,386	3.6%
Broiler and Turkey /2	59,173	59,218	60,845	63,943	64,921	66,044	1.7%
Total	198,425	199,801	204,973	212,544	218,208	224,147	2.7%
Consumption							
Beef and Veal /1	50,277	49,049	49,874	50,770	51,509	52,580	2.1%
Pork /1	87,829	90,297	92,139	95,236	98,914	102,374	3.5%
Broiler & Turkey /2	57,634	57,664	58,923	62,050	63,598	64,460	1.4%
Total	195,740	197,010	200,936	208,056	214,021	219,414	2.5%
Imports							
Beef and Veal /1	5,242	5,074	4,891	5,423	5,007	5,365	7.1%
Pork /1	3,871	3,962	4,172	4,342	4,232	4,235	0.1%
Broiler and Turkey /2	4,861	5,025	4,768	5,517	5,627	5,796	3.0%
Total	13,974	14,061	13,831	15,282	14,866	15,396	3.6%
Exports							
Beef and Veal /1	6,274	6,339	6,496	7,092	6,996	7,454	6.5%
Pork /1	3,898	4,255	4,861	5,211	5,178	5,314	2.6%
Broiler and Turkey /2	6,313	6,586	6,615	7,423	7,041	7,338	4.2%
Total	16,485	17,180	17,972	19,726	19,215	20,106	4.6%
U.S. Exports							
Beef and Veal /1	1,110	1,142	209	317	523	680	30.0%
Pork /1	731	779	989	1,207	1,346	1,402	4.2%
Broiler and Turkey /2	2,379	2,451	2,371	2,619	2,696	2,769	2.7%
Total	4,220	4,372	3,569	4,143	4,565	4,851	6.3%
U.S. Market Share (%) of Exports Among Major Traders							
Beef and Veal /1	18%	18%	3%	4%	7%	9%	2%
Pork /1	19%	18%	20%	23%	26%	26%	0%
Broiler and Turkey /2	38%	37%	36%	35%	38%	38%	-1%
Combined	26%	25%	20%	21%	24%	24%	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)

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 Forecast Overview

- **Exports to rise despite continuing disease related trade restrictions**

World supply of beef continues to be tight due to the negative impacts of bovine spongiform encephalopathy (BSE) and foot and mouth disease (FMD)-related trade restrictions. Total beef exports by major traders are forecast to increase over 6 percent in 2007 not only due to countries not significantly impacted by disease (Argentina, Australia, India, and New Zealand) but also as some countries recover from disease related trade restrictions (Brazil, United States). Canadian and U.S. beef exports have not achieved full recovery of lost markets due to BSE. Canadian and U.S. beef exports in 2007 are forecast down 28 percent and 39 percent respectively from 2002. However, U.S. beef exports are continuing to recover and are forecast to rise 30 percent in 2007 to 680,000 tons.

- **2007: Production and consumption growth**

Beef production and consumption in selected countries is forecast to increase in 2007 by just over 2 percent. China, Brazil and the United States are forecast to make the largest gains in production. Chinese beef production has grown 5 to 7 percent annually since 2002 and will increase over 5 percent in 2007 due to an increasing herd. Continued production growth in China is supported by strong domestic demand as disposable income increases and consumers shift from poultry to other meats due to avian influenza (AI) concerns. Similarly, beef production growth in Brazil, forecast at 3 percent in 2007, is driven by strong domestic demand but also full and partial lifting of trade bans. Though still combating FMD outbreaks, the Brazilian cattle herd continues to expand, forecast to rise almost 4 percent in 2007 bolstered by investments in genetics and government supported improved production practices.

- **Brazil's exports expand as FMD restrictions decline**

Brazilian beef exports are forecast to increase 2 percent in 2007 as several markets have fully or partially lifted bans that were imposed because of FMD. Brazil lost significant exports in Russia, its major market, as well as to Chile and the EU during the first half of 2006. However, Brazil's total beef exports in the first half of 2006 were stable as it compensated for the loss of major markets by expanding sales to Egypt, Saudi Arabia, Israel, Romania and several other smaller markets as well as cooked product to the United States. Brazil's focus on smaller non-traditional markets will likely continue in the second half of 2006 and through 2007.

- **Japan: Winners and losers**

Japanese beef imports are forecast to increase more than 10 percent in 2007 after an expected 1 percent decrease in 2006. High Japanese beef prices have negatively impacted consumption in 2006. The return of U.S. beef to Japan should help alleviate pressure on prices, in turn spurring increased demand. Initial exports of U.S. beef to Japan have been slow for a range of reasons such as high U.S. beef prices, consumer anxiety, and strict scrutiny at ports. Further, U.S. beef exports have been and will continue to be constrained by the availability of under 21 month old cattle eligible for export to Japan. The food service sector, particularly beef bowls and barbeque establishments, found the transition to Australian grass-fed beef unsuitable or had difficulty securing supplies of Australian grain-fed beef. Thus, restaurants will be leaders in the United States' return to the Japanese beef market. With the return of the United States to the Japanese beef market, it is expected that Australian beef exports to Japan will decrease while U.S. beef imports to Japan begin to recover market share.

Pork: 2007 Forecast Overview

- **Note on PSD database: Vietnam**

The PSD now includes Vietnam for swine and pork. Data is available for 2001-2007.

- **2007: Production and consumption**

Pork production by selected countries is forecast to increase nearly 4 percent in 2007 to over 103 million tons. However, much of this increase (77 percent) is due to China which accounts for more than half of total pork production by selected countries.

- **Chinese production expansion slower in 2007 but will remain strong**

Chinese pork production and consumption are forecast to increase over 5 percent each in 2007 to record highs of nearly 55.8 and 55.3 million tons respectively. The pace of China's production growth in 2006 and 2007 will be slower than in recent years due to lower prices. However, meat consumption continues to be driven by urbanization and increasing disposable income. In addition, pork consumption in China has benefited from AI outbreaks after which some consumers substituted pork for poultry.

- **Exports to increase but only for select major traders in 2007**

Pork exports are forecast to increase in 2007 almost 3 percent to nearly 5.3 million tons after an expected 1 percent decline in 2006. Export growth will largely be due to increased U.S. and Brazilian exports.

- **Japan: Impact of reopening to U.S. beef**

Japanese pork imports are expected to decline nearly 2 percent to 1.2 million tons. The reopening of the market to U.S. beef will not significantly impact Japanese pork imports. Stocks at historically high levels and crackdowns on illegal trade are expected to be the major drivers of lower imports.

- **Brazil: Recovery of exports in 2007 but trade with Russia will decline**

Recovering from a slight decline in 2006, Brazilian pork production will increase nearly 5 percent in 2007 to just under 2.9 million tons. This increase in production will be driven by increased domestic demand and the recovery of export markets impacted by FMD outbreaks in late 2005. Russia was the primary market for Brazilian pork exports in 2005, accounting for 67 percent of trade. From January to July 2006, Brazilian pork exports to Russia were down 44 percent from the same period in 2005. However, in the same period, Brazilian pork exports were higher for non-traditional markets such as Hong Kong, Singapore, and Ukraine. Brazilian pork exports are expected to decline 29 percent in 2006. As shipments increase to smaller non-traditional markets to compensate for the loss of major markets, Brazilian pork exports are forecast to rise 6 percent in 2007 to 570,000 million tons.

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

U.S. pork exports are forecast to achieve a historic high of just over 1.4 million tons in 2007. Exports accounted for only 12.8 percent of U.S. pork production in 2005 but are forecast to account for 14.3 percent in 2007. U.S. pork exports to Russia will grow as Brazil will be unable to sustain its position in the Russian market due to FMD. The United States, as well as Canada and the EU will likely benefit from the reduced participation of Brazil in the Russian market.

Poultry: 2007 Forecast Overview

Broiler Meat

- **Exports to recuperate in 2007**

Broiler meat exports by major traders are forecast to increase 4 percent to 6.7 million tons in 2007 after dropping in 2006. Major exporters are forecast to increase shipments or have steady sales with no significant shifts in market shares in 2007. While U.S. market share is expected to increase to 37 percent, Brazil's share is expected to drop by 1 point to 38 percent and the European Union share remain constant at 10 percent. Though EU broiler meat exports have declined since 2004, exports are forecast to recover in 2007 after dropping again in 2006 as temporary bans placed on French exports due to an AI outbreak on a commercial poultry farm are lifted.

- **Brazilian exports to rebound in 2007**

Following a succession of annual increases in exports from 1999-2005, Brazilian broiler exports are expected to decrease in 2006 due to weakening demand in some of its major export markets. This is a result of the strengthening of the Real against major currencies and AI concerns which led consumers in importing countries to substitute other meat and protein sources for poultry. As a result, Brazil's poultry sector was facing an oversupply situation. Brazil's broiler meat exports are forecast to increase 2 percent to nearly 2.6 million tons in 2007 as a result of increased consumer demand as AI concerns decline, increased sales to Russia, and aggressive marketing.

- **Total imports by major traders to increase in 2007**

Despite a forecasted import decline in broiler meat imports by Russia and Japan in 2007, imports by major traders are forecast to increase over 3 percent to over 5.3 million tons. Chinese imports are forecast to expand in 2007 to levels similar to years prior to 2004 when imports were not affected by avian influenza concerns. Mexican broiler imports are forecast to grow 6 percent in 2007 despite higher production. Increased domestic use is the main driving factor in Mexico's import growth as more investment is put into their domestic poultry processing industry. Japanese broiler meat imports are forecast to drop in 2007 due to stable production and higher stocks.

- **EU imports to rise**

EU broiler meat imports are expected to increase substantially in 2006 (15 percent) and are forecast to increase nearly 8 percent in 2007 to 645,000 tons. While the EU is negotiating a poultry TRQ with Brazil and Thailand, the EU's loss of the appeal to the WTO of the salted poultry case in June 2006 will result in increased imports from Brazil and Thailand at reduced tariffs.

- **Russian imports to decline**

Russia, the largest importer of broiler meat, is forecast to decrease imports in 2007 by over 7 percent to nearly 1.2 million tons. Russian imports are forecast to decrease as Russian poultry production has been increasing steadily in recent years and is expected to reach another record in 2007. The U.S. supplies over 60 percent of its poultry import needs and the rest is covered mainly by Brazil.

Turkey Meat

- **Turkey meat imports forecast to increase in 2007**

Turkey meat imports by selected countries are forecast at 459,000 tons in 2007. Turkey imports by Mexico and the EU are both forecast to increase by 5 percent in 2007.

Turkey exports by major traders are forecast to increase over 5 percent in 2007 after declining nearly 10 percent in 2006 due to reduced demand caused by AI-concerns and AI-related trade bans on EU exports. U.S. turkey meat exports are forecast to increase nearly 8 percent to 261,000 tons in 2007. Market shares among major traders will remain essentially unchanged in 2007.

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

	2002	2003	2004	2005	2006	2007 Oct
Production						
Brazil	7,240	7,385	7,975	8,592	8,850	9,120
China, Peoples Republic of	5,846	6,305	6,759	7,115	7,500	7,910
EU-25	8,145	8,061	8,007	7,770	7,880	7,880
Argentina	2,700	2,800	3,130	3,200	3,100	3,150
India	1,810	1,960	2,130	2,250	2,375	2,500
Australia	2,089	2,073	2,081	2,102	2,150	2,290
Mexico	1,930	1,950	2,099	2,125	2,175	2,200
Russian Federation	1,740	1,670	1,590	1,525	1,460	1,380
Canada	1,294	1,190	1,496	1,523	1,375	1,335
New Zealand	589	693	720	705	650	690
Others	5,431	3,969	4,079	4,150	4,099	4,094
Total Foreign	38,814	38,056	40,066	41,057	41,614	42,549
United States	12,427	12,039	11,261	11,317	11,897	12,168
Total	51,241	50,095	51,327	52,374	53,511	54,717
Total Dom. Consumption						
EU-25	8,187	8,315	8,292	8,114	8,220	8,240
China, Peoples Republic of	5,818	6,274	6,703	7,026	7,413	7,829
Brazil	6,437	6,273	6,400	6,774	6,935	7,180
Argentina	2,362	2,426	2,512	2,443	2,604	2,552
Mexico	2,409	2,308	2,368	2,419	2,505	2,535
Russian Federation	2,450	2,378	2,308	2,503	2,285	2,270
India	1,393	1,521	1,631	1,623	1,625	1,700
Japan	1,319	1,366	1,181	1,201	1,186	1,256
Canada	991	1,066	1,057	1,106	1,067	1,059
Australia	696	786	747	735	740	755
Others	5,478	3,996	4,008	4,164	4,129	4,180
Total Foreign	37,540	36,709	37,207	38,108	38,709	39,556
United States	12,737	12,340	12,667	12,662	12,800	13,024
Total	50,277	49,049	49,874	50,770	51,509	52,580

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)

	2002	2003	2004	2005	2006	2007 Oct
Total Imports						
Russian Federation	719	720	730	993	840	905
Japan	712	851	647	700	693	765
EU-25	461	463	584	599	540	560
Mexico	489	370	287	325	365	375
Egypt	173	123	168	214	225	240
Korea, Republic of	430	444	218	243	193	230
Canada	308	274	111	133	150	160
Philippines	126	129	164	140	142	148
Taiwan	89	98	80	92	98	100
Hong Kong	71	81	81	92	92	93
Others	205	158	152	260	230	265
Total Foreign	3,783	3,711	3,222	3,791	3,568	3,841
United States	1,459	1,363	1,669	1,632	1,439	1,524
Total	5,242	5,074	4,891	5,423	5,007	5,365
Total Exports						
Brazil	881	1,175	1,628	1,867	1,945	1,985
Australia	1,366	1,264	1,394	1,413	1,420	1,495
India	417	439	499	627	750	800
Argentina	348	386	623	762	500	600
New Zealand	486	558	606	589	540	570
Uruguay	262	325	410	487	510	520
Canada	609	383	557	551	455	440
EU-25	485	388	358	255	200	200
China, Peoples Republic of	44	43	61	91	90	85
Mexico	10	12	18	31	35	40
Others	256	224	133	102	28	39
Total Foreign	5,164	5,197	6,287	6,775	6,473	6,774
United States	1,110	1,142	209	317	523	680
Total	6,274	6,339	6,496	7,092	6,996	7,454

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)

	2002	2003	2004	2005	2006	2007 Oct
Production						
China, Peoples Republic of	43,266	45,186	47,016	50,106	53,000	55,800
EU-25	20,938	21,150	21,192	21,102	21,450	21,500
Brazil	2,565	2,560	2,600	2,800	2,745	2,875
Russian Federation	1,630	1,710	1,725	1,735	1,800	1,910
Canada	1,854	1,882	1,936	1,914	1,885	1,860
Vietnam	1,209	1,257	1,408	1,602	1,713	1,832
Mexico	1,085	1,100	1,150	1,195	1,200	1,250
Philippines	1,095	1,145	1,145	1,175	1,215	1,245
Japan	1,236	1,260	1,272	1,245	1,240	1,235
Korea, Republic of	1,153	1,149	1,100	1,036	1,039	1,077
Others	3,051	3,033	2,945	2,925	2,946	2,993
Total Foreign	79,082	81,432	83,489	86,835	90,233	93,577
United States	8,929	9,056	9,312	9,392	9,543	9,809
Total	88,011	90,488	92,801	96,227	99,776	103,386
Total Dom. Consumption						
China, Peoples Republic of	43,193	45,054	46,648	49,652	52,536	55,324
EU-25	19,746	20,043	19,773	19,766	20,072	20,122
Russian Federation	2,453	2,420	2,337	2,476	2,580	2,715
Japan	2,377	2,373	2,562	2,507	2,530	2,501
Brazil	1,975	1,957	1,979	2,039	2,205	2,305
Vietnam	1,190	1,244	1,386	1,583	1,698	1,815
Mexico	1,349	1,423	1,556	1,556	1,585	1,640
Korea, Republic of	1,199	1,294	1,331	1,305	1,314	1,310
Philippines	1,137	1,167	1,169	1,198	1,240	1,272
Taiwan	967	947	959	950	968	956
Others	3,558	3,559	3,622	3,533	3,529	3,540
Total Foreign	79,144	81,481	83,322	86,565	90,257	93,500
United States	8,685	8,816	8,817	8,671	8,657	8,874
Total	87,829	90,297	92,139	95,236	98,914	102,374

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)

	2002	2003	2004	2005	2006	2007 Oct
Total Imports						
Japan	1,162	1,133	1,302	1,339	1,250	1,228
Russian Federation	834	725	629	765	800	825
Mexico	325	371	458	420	450	460
Hong Kong	275	302	332	305	310	317
Romania	106	133	179	263	288	275
Korea, Republic of	155	153	220	328	254	220
Canada	91	91	105	140	140	145
Australia	55	67	77	99	90	99
Ukraine	2	13	64	62	45	45
Taiwan	32	54	61	39	33	36
Others	348	382	246	118	109	118
Total Foreign	3,385	3,424	3,673	3,878	3,769	3,768
United States	486	538	499	464	463	467
Total	3,871	3,962	4,172	4,342	4,232	4,235
Total Exports						
EU-25	1,158	1,234	1,463	1,357	1,400	1,400
Canada	864	975	972	1,084	1,100	1,120
Brazil	590	603	621	761	540	570
China, Peoples Republic of	307	397	537	502	500	510
Chile	59	80	103	128	124	135
Mexico	61	48	52	59	65	70
Australia	78	74	59	53	56	54
Russian Federation	11	15	17	24	20	20
Vietnam	18	12	22	19	15	18
Korea, Republic of	16	17	10	5	11	15
Others	5	21	16	12	1	0
Total Foreign	3,167	3,476	3,872	4,004	3,832	3,912
United States	731	779	989	1,207	1,346	1,402
Total	3,898	4,255	4,861	5,211	5,178	5,314

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)

	2002	2003	2004	2005	2006	2007 Oct
Production						
China, Peoples Republic of	9,558	9,898	9,998	10,200	10,350	10,520
Brazil	7,449	7,645	8,408	9,350	9,280	9,670
EU-25	7,788	7,512	7,627	7,736	7,425	7,530
Mexico	2,157	2,290	2,389	2,498	2,610	2,724
India	1,400	1,500	1,650	1,900	2,000	2,200
Argentina	640	750	910	1,030	1,210	1,290
Russian Federation	500	560	650	900	1,080	1,260
Japan	1,107	1,127	1,124	1,166	1,195	1,185
Thailand	1,275	1,340	900	950	1,050	1,100
Canada	932	929	946	977	970	980
Others	6,882	6,035	6,064	6,516	6,758	6,290
Total Foreign	39,688	39,586	40,666	43,223	43,928	44,749
United States	14,467	14,696	15,286	15,869	16,162	16,413
Total	54,155	54,282	55,952	59,092	60,090	61,162
Total Dom. Consumption						
China, Peoples Republic of	9,556	9,963	9,931	10,088	10,370	10,585
EU-25	7,417	7,312	7,280	7,503	7,405	7,490
Brazil	5,873	5,742	5,992	6,612	6,780	7,120
Mexico	2,424	2,627	2,713	2,871	3,010	3,148
Russian Federation	1,697	1,680	1,675	2,139	2,330	2,400
India	1,400	1,496	1,648	1,899	2,000	2,200
Japan	1,830	1,841	1,713	1,880	1,908	1,915
Argentina	618	719	845	949	1,124	1,184
South Africa, Republic of	830	928	956	1,010	1,062	1,075
Saudi Arabia	816	904	889	1,011	972	1,019
Others	8,115	7,151	7,449	7,949	8,110	7,707
Total Foreign	40,576	40,363	41,091	43,911	45,071	45,843
United States	12,270	12,540	13,081	13,428	13,817	13,901
Total	52,846	52,903	54,172	57,339	58,888	59,744

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)

	2002	2003	2004	2005	2006	2007 Oct
Total Imports						
Russian Federation	1,208	1,081	1,016	1,225	1,240	1,150
Japan	744	695	582	748	740	725
EU-25	500	588	466	522	600	645
Saudi Arabia	391	452	429	484	434	470
China, Peoples Republic of	436	453	174	219	370	430
Mexico	267	338	326	374	400	424
Hong Kong	164	154	244	222	234	237
South Africa, Republic of	80	125	154	189	225	225
United Arab Emirates	133	154	158	167	137	165
Venezuela	0	6	25	100	120	150
Others	514	573	798	798	649	700
Total Foreign	4,437	4,619	4,372	5,048	5,149	5,321
United States	6	6	12	15	19	16
Total	4,443	4,625	4,384	5,063	5,168	5,337
Total Exports						
Brazil	1,577	1,903	2,416	2,739	2,500	2,550
EU-25	871	788	813	755	620	685
China, Peoples Republic of	438	388	241	331	350	365
Thailand	427	485	200	240	280	280
Argentina	23	39	66	84	90	110
Canada	84	76	74	101	95	95
Kuwait	1	3	4	97	26	75
United Arab Emirates	37	40	15	20	10	30
Saudi Arabia	20	20	10	10	10	10
Romania	4	5	7	7	3	8
Others	40	44	39	47	32	21
Total Foreign	3,522	3,791	3,885	4,431	4,016	4,229
United States	2,180	2,232	2,170	2,360	2,454	2,508
Total	5,702	6,023	6,055	6,791	6,470	6,737

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.

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

	2002	2003	2004	2005	2006	2007 Oct
Production						
EU-25	2,102	2,025	2,030	1,917	1,810	1,790
Brazil	182	200	240	275	290	320
Canada	147	148	145	155	160	164
Russian Federation	9	12	15	17	19	21
Mexico	13	14	13	14	14	15
South Africa, Republic of	3	4	5	5	5	7
Others	5	4	4	4	4	0
Total Foreign	2,461	2,407	2,452	2,387	2,302	2,317
United States	2,557	2,529	2,441	2,464	2,529	2,565
Total	5,018	4,936	4,893	4,851	4,831	4,882
Total Dom. Consumption						
EU-25	1,863	1,885	1,913	1,832	1,770	1,755
Mexico	153	172	157	199	204	215
Brazil	92	88	104	114	137	160
Canada	142	137	139	143	144	147
Russian Federation	174	126	112	124	115	122
South Africa, Republic of	16	32	33	30	35	36
Others	32	20	21	22	23	0
Total Foreign	2,472	2,460	2,479	2,464	2,428	2,435
United States	2,316	2,301	2,272	2,247	2,282	2,281
Total	4,788	4,761	4,751	4,711	4,710	4,716

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

Notes: 1/ From 2003 onward, Hong Kong, Korea, and Malaysia are dropped from the turkey PSD.
2/ From 2007 onward, Taiwan is dropped from the turkey PSD.

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

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

	2002	2003	2004	2005	2006	2007 Oct
Total Imports						
Mexico	147	158	144	185	190	200
EU-25	60	76	88	103	110	115
Russian Federation	165	114	97	107	96	101
South Africa, Republic of	13	28	28	25	30	29
Canada	6	7	8	12	10	12
Others	27	16	17	18	19	0
Total Foreign	418	399	382	450	455	457
United States	0	1	2	4	4	2
Total	418	400	384	454	459	459
Total Exports						
Brazil	90	112	136	161	153	160
EU-25	299	216	205	188	150	150
Canada	16	16	18	24	26	30
Others	7	0	0	0	0	0
Total Foreign	412	344	359	373	329	340
United States	199	219	201	259	242	261
Total	611	563	560	632	571	601

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

Notes: 1/ From 2003 onward, Hong Kong, Korea, and Malaysia are dropped from the turkey PSD.
2/ From 2007 onward, Taiwan is dropped from the turkey PSD.

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

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

	2002	2003	2004	2005	2006	2007 Oct
Total Cattle Beg. Stks						
India	285,124	286,079	283,103	282,500	282,300	282,000
Brazil	156,314	161,463	165,492	169,567	173,816	180,103
China, Peoples Republic of	128,242	130,848	134,672	137,818	141,575	145,349
EU-25	90,339	88,719	87,478	86,412	85,806	85,150
Argentina	50,369	50,869	50,768	50,167	50,166	50,766
Australia	27,870	27,870	26,640	27,270	27,782	28,600
Mexico	28,481	29,224	28,437	27,572	26,949	26,644
Russian Federation	24,510	23,500	22,285	21,100	19,850	18,695
Canada	13,762	13,488	14,653	15,063	14,830	14,400
South Africa, Republic of	13,505	13,635	13,540	13,510	13,790	14,200
Others	110,795	67,894	64,987	61,593	60,730	59,939
Total Foreign	929,311	893,589	892,055	892,572	897,594	905,846
United States	96,723	96,100	94,888	95,438	97,102	98,400
Total	1,026,034	989,689	986,943	988,010	994,696	1,004,246
Production (Calf Crop)						
China, Peoples Republic of	47,164	51,654	54,162	57,020	60,100	63,300
India	54,200	55,100	55,800	56,500	57,000	57,000
Brazil	43,455	44,887	46,234	48,327	50,928	53,490
EU-25	31,937	31,834	31,025	30,242	29,900	29,600
Argentina	13,800	14,000	15,000	15,400	15,000	14,700
Australia	10,101	8,823	9,970	9,643	10,243	10,490
Mexico	7,665	7,200	7,300	7,500	7,950	8,200
Russian Federation	9,220	8,845	8,400	7,950	7,500	7,110
Canada	5,711	5,788	5,542	5,625	5,300	5,000
New Zealand	4,438	4,475	4,450	4,460	4,470	4,480
Others	32,271	21,552	20,762	20,316	19,998	19,926
Total Foreign	259,962	254,158	258,645	262,983	268,389	273,296
United States	38,224	37,903	37,505	37,780	37,900	38,000
Total	298,186	292,061	296,150	300,763	306,289	311,296

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)

	2002	2003	2004	2005	2006	2007 Oct
Total Imports						
South Africa, Republic of	145	130	145	210	210	140
Mexico	206	53	68	85	95	125
EU-25	48	65	68	63	65	70
Russian Federation	11	10	7	14	40	60
Philippines	120	100	55	25	25	40
Japan	15	23	21	25	28	30
Canada	138	63	19	21	40	25
China, Peoples Republic of	11	50	132	50	25	22
Romania	5	1	2	5	5	6
Bulgaria	0	0	0	2	3	3
Others	505	197	14	53	28	3
Total Foreign	1,204	692	531	553	564	524
United States	2,503	1,752	1,371	1,815	2,275	2,200
Total	3,707	2,444	1,902	2,368	2,839	2,724
Total Exports						
Mexico	948	1,240	1,375	1,259	1,300	1,400
Canada	1,688	506	0	559	975	900
Australia	972	774	638	573	585	640
EU-25	509	475	435	322	270	260
Brazil	1	3	16	113	150	180
Romania	98	152	172	155	150	155
China, Peoples Republic of	58	51	59	54	51	51
New Zealand	11	18	69	50	40	40
Bulgaria	22	25	25	51	30	32
Uruguay	10	12	41	10	20	20
Others	479	217	94	13	16	16
Total Foreign	4,796	3,473	2,924	3,159	3,587	3,694
United States	244	99	16	22	40	60
Total	5,040	3,572	2,940	3,181	3,627	3,754

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)

	2002	2003	2004	2005	2006	2007 Oct
Total Beginning Stocks						
China, Peoples Republic of	457,430	462,915	466,017	481,891	503,348	519,052
EU-25	152,473	154,311	152,793	151,143	151,673	152,000
Brazil	32,710	32,655	32,081	32,323	32,938	33,147
Vietnam	21,764	23,167	24,885	26,144	27,435	28,369
Russian Federation	16,570	17,000	17,200	16,500	16,550	17,610
Canada	14,367	14,672	14,623	14,619	14,690	14,250
Philippines	11,816	12,218	12,518	12,139	13,041	13,693
Mexico	10,569	10,549	10,668	10,303	10,125	10,250
Japan	9,612	9,725	9,724	9,550	9,620	9,600
Korea, Republic of	7,856	8,110	8,367	8,044	8,098	8,304
Others	25,992	27,418	25,101	23,959	24,875	25,695
Total Foreign	761,159	772,740	773,977	786,615	812,393	831,970
United States	59,722	59,554	60,444	60,975	61,449	61,400
Total	820,881	832,294	834,421	847,590	873,842	893,370
Production (Pig Crop)						
China, Peoples Republic of	575,212	597,814	636,742	685,399	720,000	750,000
EU-25	260,014	254,218	249,245	250,486	253,350	252,800
Vietnam	27,627	29,020	33,330	37,544	39,791	42,226
Russian Federation	34,200	35,000	35,000	35,500	37,000	39,300
Canada	29,644	31,414	33,163	33,369	33,200	33,000
Brazil	30,093	29,716	30,015	32,295	31,257	32,040
Philippines	21,500	23,100	22,750	24,640	25,270	25,900
Japan	17,000	17,250	17,160	17,000	16,900	16,850
Mexico	15,250	15,300	15,350	15,500	15,700	15,800
Korea, Republic of	15,906	15,856	14,796	13,817	14,015	14,200
Others	37,535	34,295	34,441	35,395	36,123	37,223
Total Foreign	1,063,981	1,082,983	1,121,992	1,180,945	1,222,606	1,259,339
United States	101,677	101,491	102,781	103,965	105,311	107,825
Total	1,165,658	1,184,474	1,224,773	1,284,910	1,327,917	1,367,164

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)

	2002	2003	2004	2005	2006	2007 Oct
Total Imports						
Russian Federation	6	33	130	84	290	250
Mexico	246	184	190	181	200	225
Romania	231	116	122	171	175	210
Ukraine	0	0	0	139	35	30
Bulgaria	1	1	1	15	10	10
China, Peoples Republic of	1	2	2	3	3	3
Canada	14	4	3	1	1	1
EU-25	7	0	1	1	1	1
Korea, Republic of	1	1	1	2	1	1
Vietnam	0	0	0	1	0	1
Others	1	1	0	1	0	0
Total Foreign	508	342	450	599	716	732
United States	5,741	7,438	8,506	8,192	8,620	8,800
Total	6,249	7,780	8,956	8,791	9,336	9,532
Total Exports						
Canada	5,740	7,442	8,511	8,215	8,620	8,800
China, Peoples Republic of	1,889	1,887	1,973	1,769	1,700	1,600
EU-25	355	271	446	765	850	800
Bulgaria	0	0	0	2	3	3
Russian Federation	0	0	0	0	1	1
Others	16	3	4	2	1	0
Total Foreign	8,000	9,603	10,934	10,753	11,175	11,204
United States	206	170	174	154	159	160
Total	8,206	9,773	11,108	10,907	11,334	11,364

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	65.2	63.3
Australia	35.6	39.8	37.5	36.6	36.5	36.9
Brazil	35.8	34.5	34.8	36.4	36.9	37.8
Bulgaria	9.8	9.9	10.1	13.7	12.5	11.9
Canada	31.1	33.1	32.5	33.7	32.2	31.7
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	17.8	18.0	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	9.3	9.9
Korea, South	12.7	12.6	9.6	9.0	8.6	9.5
Mexico	23.3	22.1	22.4	22.6	23.1	23.1
New Zealand	31.5	37.5	31.5	31.2	29.4	31.6
Philippines	4.1	4.1	4.5	4.0	4.0	4.0
Romania	7.1	6.7	8.9	10.6	10.8	10.9
Russian Federation	16.7	16.2	15.7	17.1	15.7	15.6
South Africa	14.3	13.9	15.0	15.8	15.5	15.6
Taiwan	4.2	4.6	3.7	4.2	4.5	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	42.9	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	11.0	11.7	12.1
Bulgaria	26.9	23.3	16.2	14.0	14.1	15.6
Canada	33.6	31.2	32.8	29.3	28.1	26.6
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	40.0	41.9
European Union 1/	43.4	44.0	43.3	43.3	43.9	43.9
Hong Kong	62.4	65.6	71.9	65.7	65.7	65.3
Japan	18.7	18.7	20.1	19.7	19.8	19.6
Korea, South	25.0	26.8	27.5	26.8	26.9	26.7
Mexico	13.2	13.7	14.8	14.7	14.8	15.1
Philippines	13.7	13.8	13.6	13.6	13.9	14.0
Romania	23.8	24.7	29.0	33.9	34.9	34.6
Russian Federation	16.9	16.7	16.2	17.3	18.1	19.1
Taiwan	43.1	41.9	42.2	41.5	42.0	41.3
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	29.5
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

Poultry: 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	36.0	37.5
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	16.4	16.2	16.3
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	63.3	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	29.0
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	16.3	16.9
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	12.1	12.6
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	46.3	46.2
Venezuela	13.2	12.4	13.6	17.7	19.0	21.3
Turkey						
Brazil	0.5	0.5	0.6	0.6	0.7	0.8
Canada	4.5	4.3	4.3	4.4	4.4	4.4
European Union 1/	4.1	4.1	4.2	4.0	3.9	3.8
Mexico	1.5	1.7	1.5	1.9	1.9	2.0
Russian Federation	1.2	0.9	0.8	0.9	0.8	0.8
South Africa	0.4	0.7	0.7	0.7	0.8	0.8
United States	8.1	7.9	7.8	7.6	7.6	7.6

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

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

- **Australia:** The broiler data series for Australia is being discontinued. Data for 2006 will be finalized in March/April 2007.
- **India:** The October 2006 forecast includes a significant historical revision to India cattle data for 1998 to 2006 due to improved data availability.
- **Taiwan:** The turkey series for Taiwan is being discontinued. Data for 2006 will be finalized in March/April 2007.
- **Vietnam:** The FAS Production, Supply and Distribution (PSD) database now includes Vietnam for swine and pork. Data is available for 2001-2007.

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 2006 and 2007 assume a continuation of policies currently in place among U.S. and Canadian trading partners as of October 13, 2006.
- **AI:** Forecasts of 2006 and 2007 poultry trade reflect policies currently in place as a result of outbreaks of avian influenza (AI) as of October 13, 2006. Subsequent forecasts will reflect any announced changes.
- **FMD:** Forecasts of 2006 and 2007 reflect the status of the foot and mouth disease (FMD) situation in Brazil as of October 13, 2006 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.

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 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. An “x” indicates that the USDA-FAS office in that country provides a report and data for that commodity.

Country Name	Report Number	Cattle	Beef	Swine	Pork	Report Number	Broiler	Turkey
Argentina	AR6029	x	x			AR6032	x	
Australia	AS6057	x	x	x	x			
Bulgaria	BU6007	x	x	x	x			
Brazil	BR6622	x	x	x	x	BR6623	x	x
Canada	CA6038	x	x	x	x	CA6035	x	x
China	CH6074	x	x	x	x	CH6075	x	
Chile	CI6024			x	x			
Egypt	EG6022	x	x					
European Union	E36107	x	x	x	x	E36108	x	x
Guatemala						GT6010	x	
Hong Kong	HK6021		x		x	HK6020	x	
India	IN6073	x	x			IN6083	x	
Indonesia						ID6021	x	
Japan	JA6038	x	x	x	x	JA6048	x	
Korea	KS6101	x	x	x	x	KS6093	x	
Kuwait						KU6002	x	
Malaysia						MY6034	x	
Mexico	MX6068	x	x	x	x	MX6071	x	x
New Zealand	NZ6013	x	x					
Philippines	RP0000	x	x	x	x	RP6040	x	
Romania	RO6018	x	x	x	x	RO6017	x	
Russian Federation	RS6049	x	x	x	x	RS6050	x	x
Saudi Arabia						SA6012	x	
South Africa	SF6031	x	x			SF6033	x	x
Taiwan	TW6033		x	x	x	TW6031	x	
Thailand						TH6086	x	
Turkey	TU6038	x	x					
Ukraine	UP6014	x	x	x	x	UP6015	x	
United Arab Emirates						TC6014	x	
Uruguay	UY6004	x	x					
Venezuela						VE6010	x	
Vietnam	VM6054			x	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 is in the process of reorganizing 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> for a new link to view future releases of "Livestock and Poultry: World Markets and Trade". The next release of this circular will be in March/April 2007.

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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