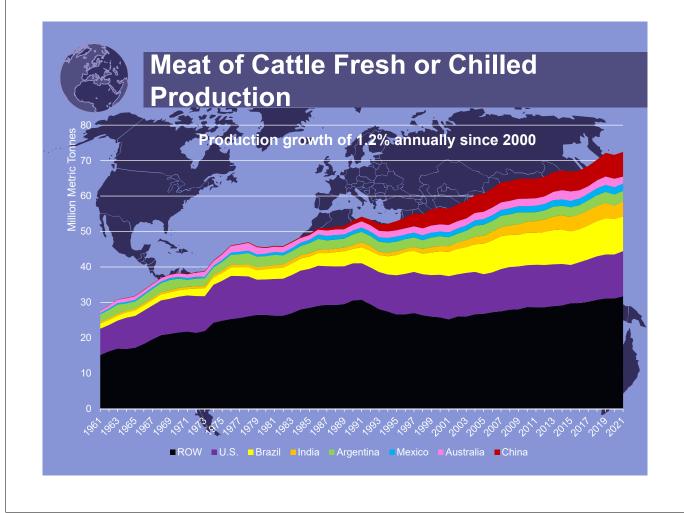




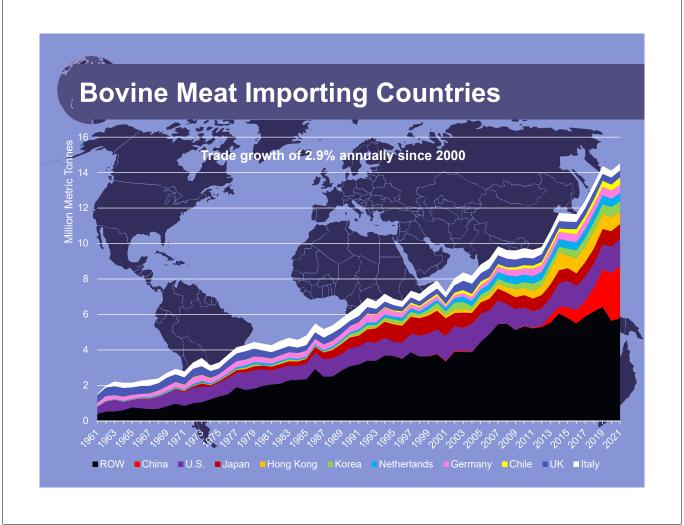
#### Introduction

- Trade is a critical issue in U.S. agriculture
- The expected protein needs were expected to more than double according to a 2009 FAO study by 2050
- Trade is becoming more important in meat products
- Exports have a significant effect on net farm income of both crop and livestock farmers

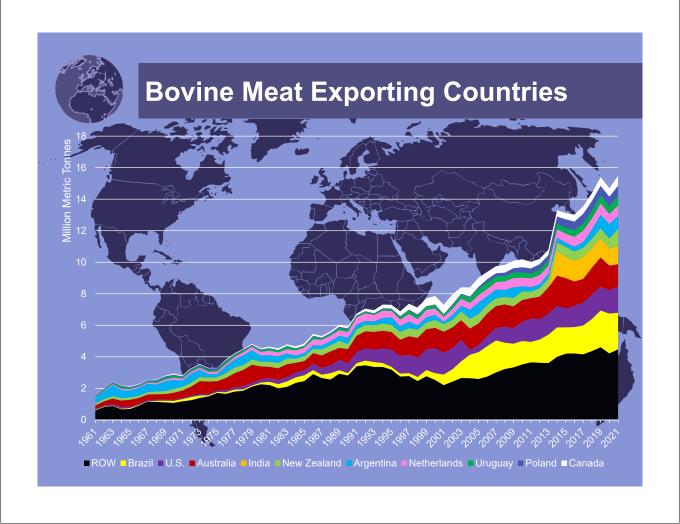




Country	Market Share
ited States	17.6%
azil	13.5%
hina	9.6%
dia	5.8%
gentina	4.1%
rket Share of top 5 pro	oducing countries –



Country	Market Share
China	20.3%
nited States	10.4%
apan	5.8%
ong Kong	4.7%
orea	4.1%
arket Share of top 5 imp	porting countries – 4





Country	Market Share
U.S.	14.9%
Argentina	10.9%
Australia	9.1%
France	7.5%
Kenya	7.1%

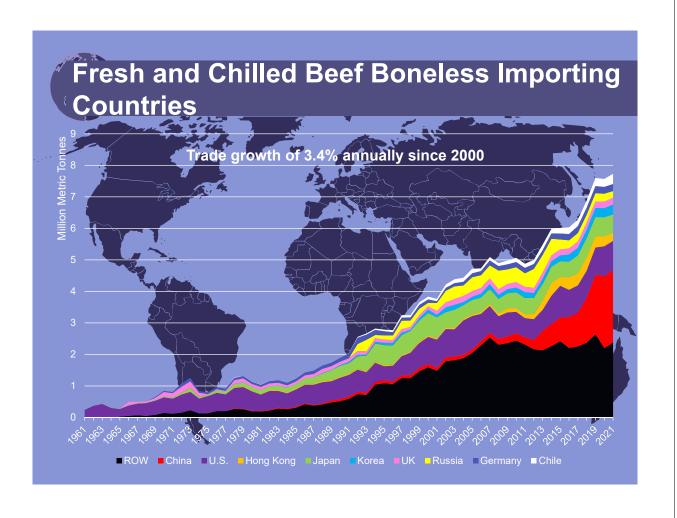
Market Share of top 5 exporting countries – 43.4%

Market Share of top 10 exporting countries - 71.1%

### World Beef Trade Types, 2021

Country	Quantity Share	Value Share
Fresh or Chilled Boneless	53.3%	71.4%
Fresh or Chilled with the Bone	14.2%	14.8%
Edible Offal	9.8%	7.5%
Beef and Veal Preparations	2.9%	3.8%
Meat of Buffalo	2.1%	1.6%
Sausages and Similar	0.6%	0.5%
Bovine Meat Salted, Dried, or Smoked	0.2%	0.4%

Fresh or Chilled Boneless is the highest valued trade

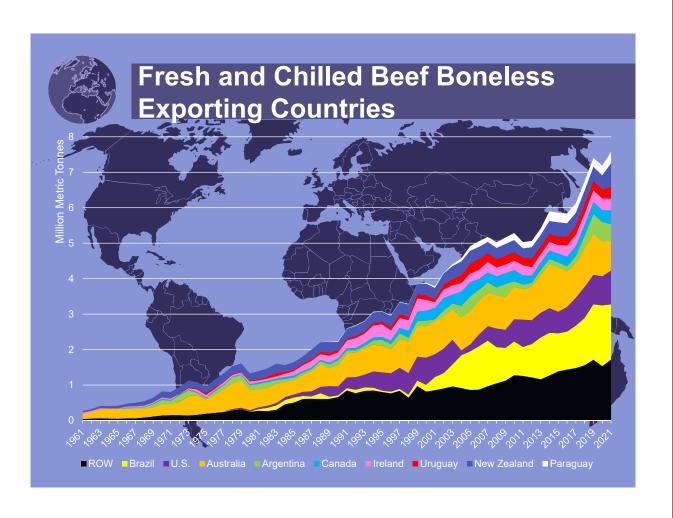


# Fresh and Chilled Beef Boneless Importing Countries, 2021

	Country	Market Share
	China	24.7%
	United States	12.0%
	Japan	7.5%
4	Chile	4.2%
٢	Korea	4.1%

Market Share of top 5 importing countries – 52.5%

Market Share of top 10 importing countries - 66.5%

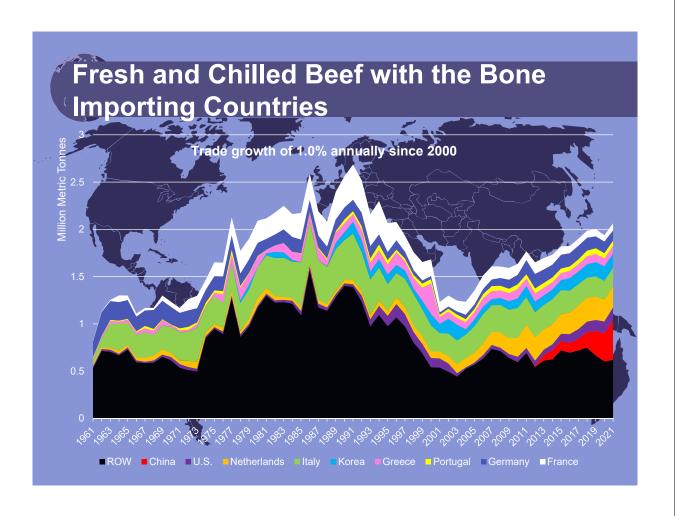


# Fresh and Chilled Beef Boneless Exporting Countries, 2021

Country	Market Share
Brazil	20.5%
United States	12.6%
Australia	11.2%
New Zealand	8.7%
Argentina	6.0%

Market Share of top 5 exporting countries – 59.1%

Market Share of top 10 exporting countries - 81.2%

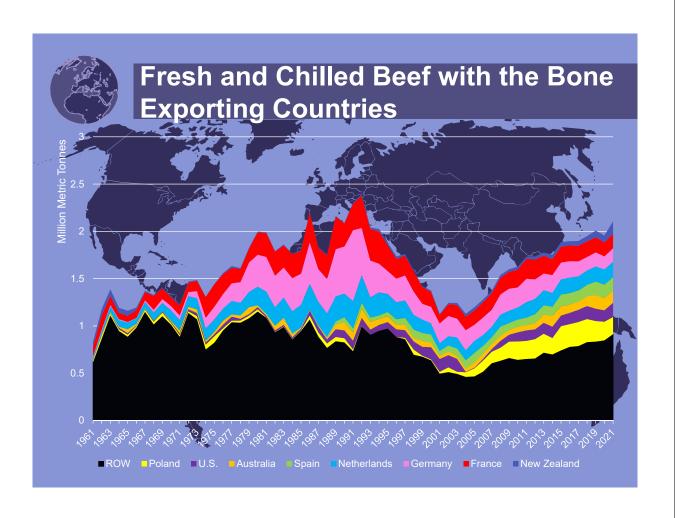


# Fresh and Chilled Beef with the Bone Importing Countries, 2021

Country	Market Share
China	20.4%
Netherlands	10.8%
Italy	9.5%
Korea	6.5%
United States	5.2%

Market Share of top 5 importing countries – 54.5%

Market Share of top 10 importing countries – 72.6%

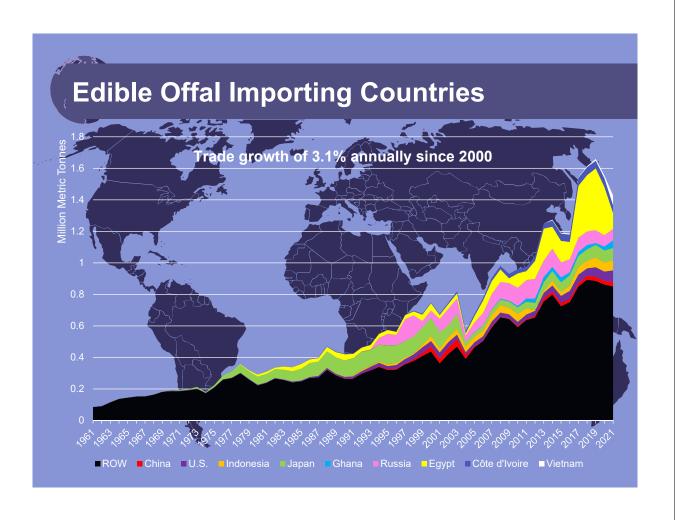


# Fresh and Chilled Beef with the Bone Exporting Countries, 2021

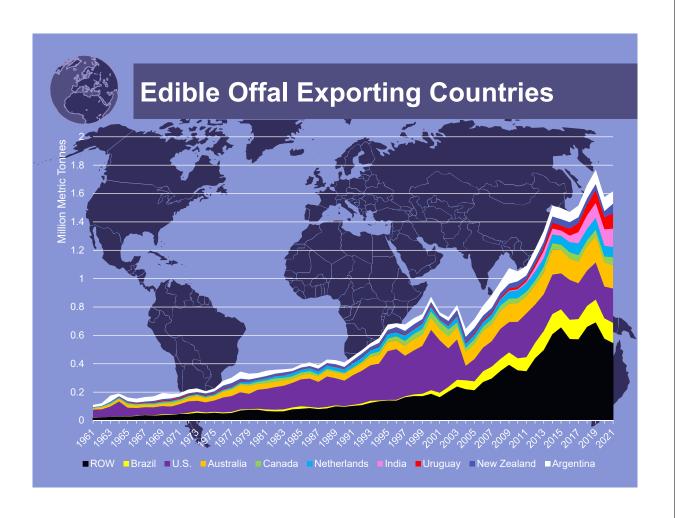
Country	Market Share
Poland	8.7%
Netherlands	7.8%
France	7.2%
United States	7.1%
Spain	6.8%

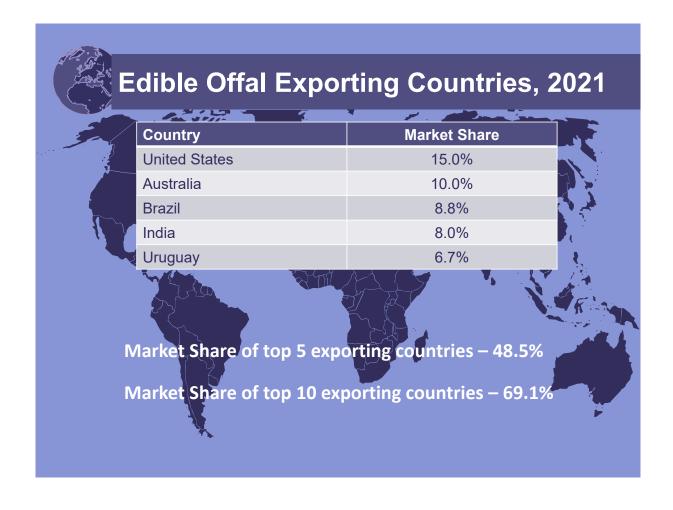
Market Share of top 5 exporting countries – 37.7%

Market Share of top 10 exporting countries - 67.0%



# Country China Egypt Japan S.6% Russia United States Market Share of top 5 importing countries – 43.9% Market Share of top 10 importing countries – 62.7%

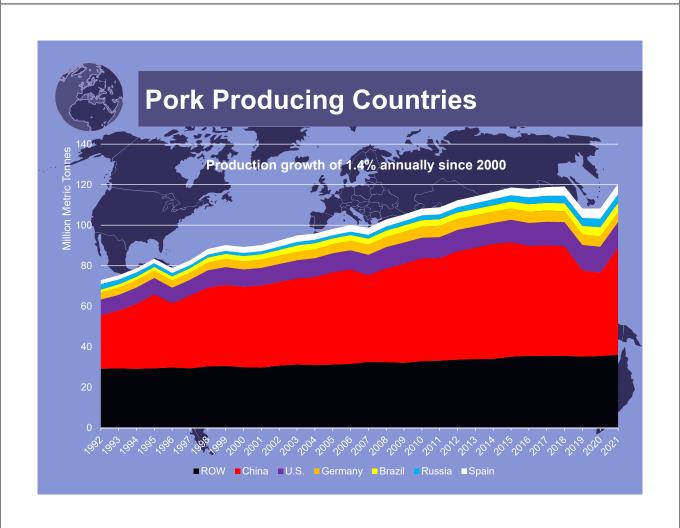


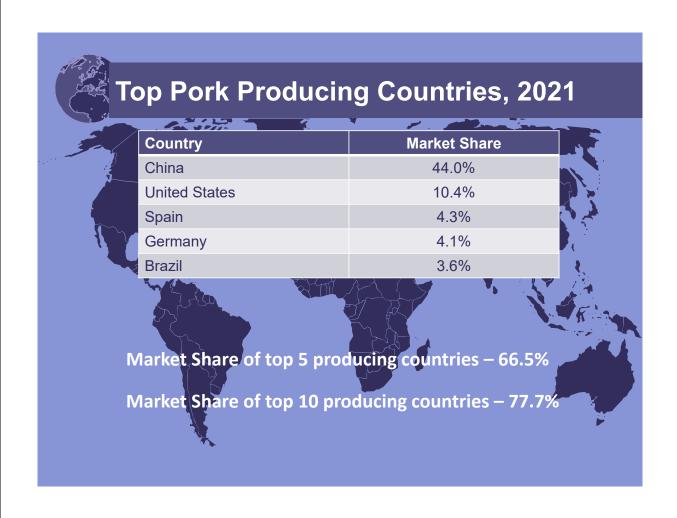


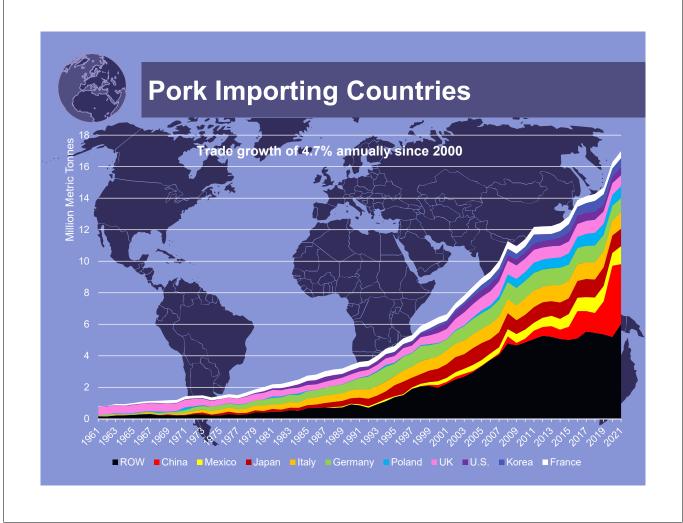


#### **Beef Analysis**

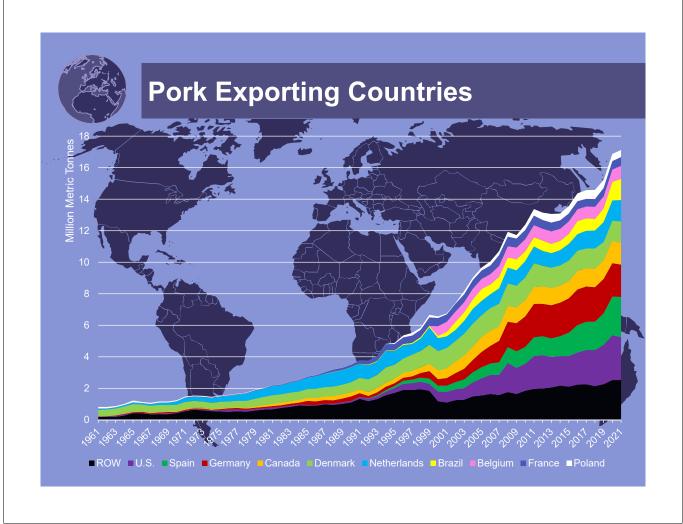
- U.S. produces about 18% of the world's beef
  - More than 13% of U.S. production is exported
- Major exporters are Brazil, United States, Australia, India, and New Zealand
  - Top ten countries market share is above 70% of exports
- Major importers are China, U.S., Japan, Hong Kong, and Korea
  - Top ten countries market share is about 60% of imports
- Fresh and Chilled Boneless is the most important traded beef product both in volume and value
  - Trade growth of 3.4% annually since 2000
  - Fresh and Chilled with Bone trade has grown by 1% since 2000
  - Edible Offal has grown by 3.1% annually since 2000







Country	Market Share
China	22.3%
Mexico	6.7%
apan	6.5%
taly	6.2%
Germany	5.2%
arket Share of top 5 im	nporting countries – 4





#### **Top Pork Exporting Countries, 2021**

Country	Market Share
United States	15.9%
Spain	14.9%
Germany	12.0%
Canada	8.0%
Denmark	8.0%

Market Share of top 5 exporting countries – 58.8%

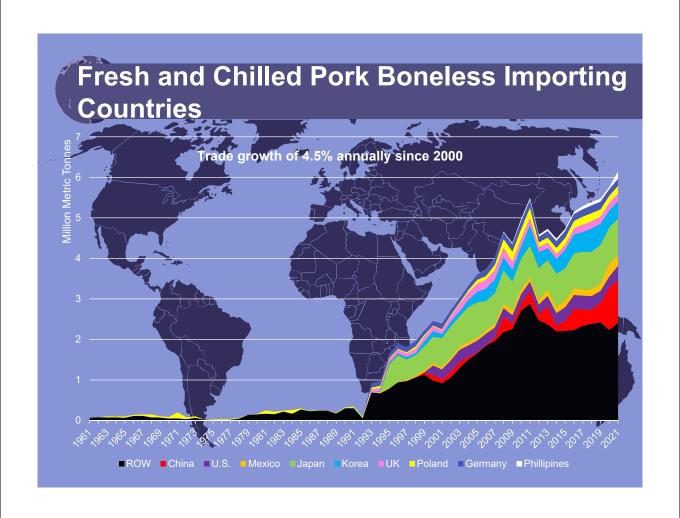
Market Share of top 10 exporting countries – 85.2%



#### **World Pork Trade Types, 2021**

Country	Quantity Share	Value Share
Fresh or Chilled with the Bone	46.0%	41.4%
Fresh or Chilled with the Boneless	36.2%	39.3%
Sausages and Other Products	7.8%	7.4%
Bacon and Ham	3.2%	0.0%

Fresh or Chilled with the Bone is the highest valued trade



# Fresh and Chilled Pork Boneless Importing Countries, 2021

Country	Market Share
China	17.3%
Japan	14.6%
Korea	7.0%
United States	5.7%
Mexico	4.3%

Market Share of top 5 importing countries – 48.9%

Market Share of top 10 importing countries - 63.5%



# Fresh and Chilled Pork Boneless Exporting Countries, 2021 Country United States Brazil Market Share 21.1% 14.7%

Spain

Canada

Germany

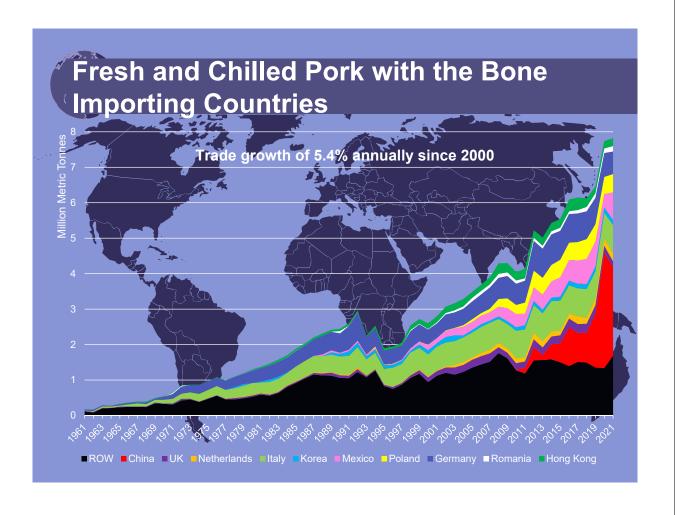
13.5%

12.9%

12.8%

Market Share of top 5 exporting countries – 75.2%

Market Share of top 10 exporting countries – 92.0%

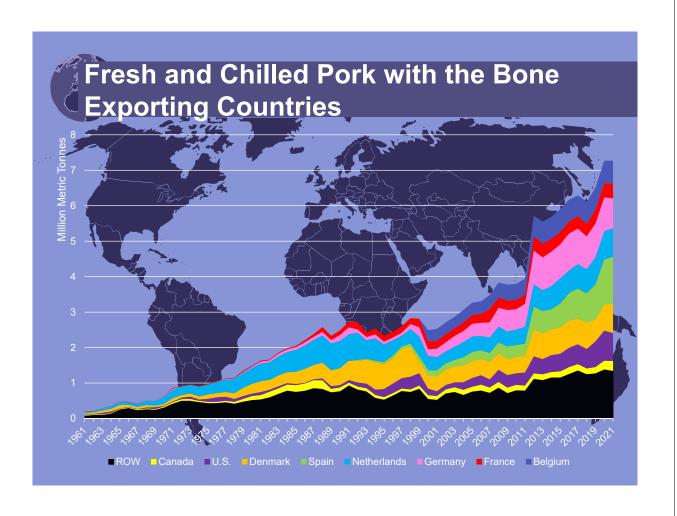


# Fresh and Chilled Pork with the Bone Importing Countries, 2021

Country	Market Share
China	32.1%
Italy	10.3%
Mexico	9.9%
Germany	8.1%
Poland	6.6%

Market Share of top 5 importing countries – 67.1%

Market Share of top 10 importing countries - 78.3%



### Fresh and Chilled Pork with the Bone Exporting Countries, 2021

Country	Market Share
Spain	18.1%
Germany	11.6%
Denmark	11.5%
Netherlands	11.1%
United States	10.8%

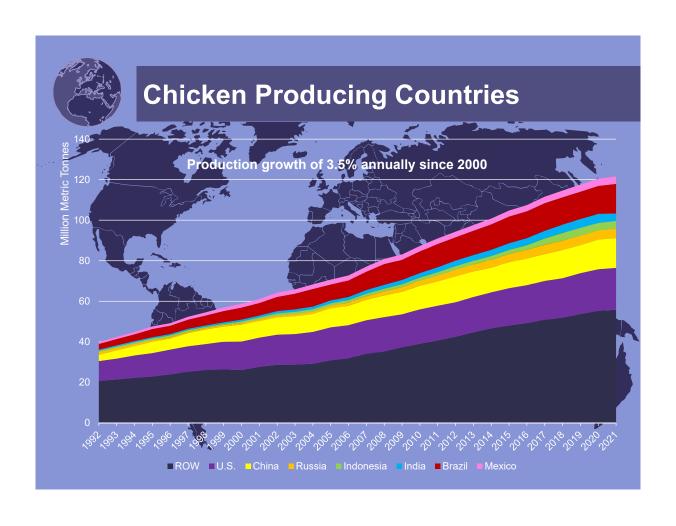
Market Share of top 5 exporting countries – 63.1%

Market Share of top 10 exporting countries - 87.5%

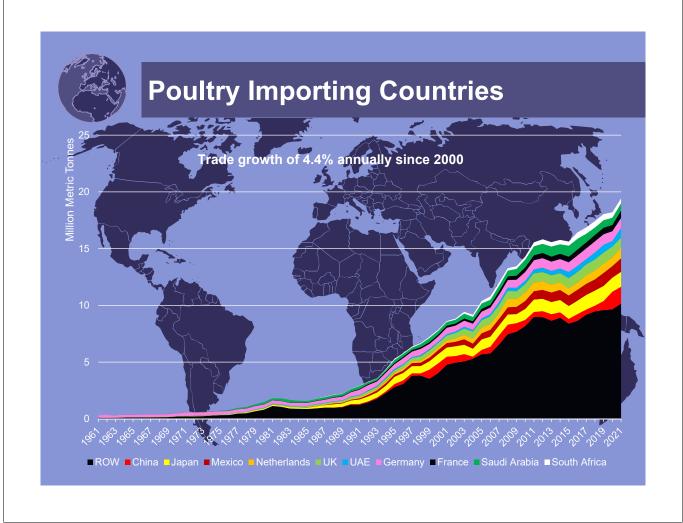


#### **Pork Analysis**

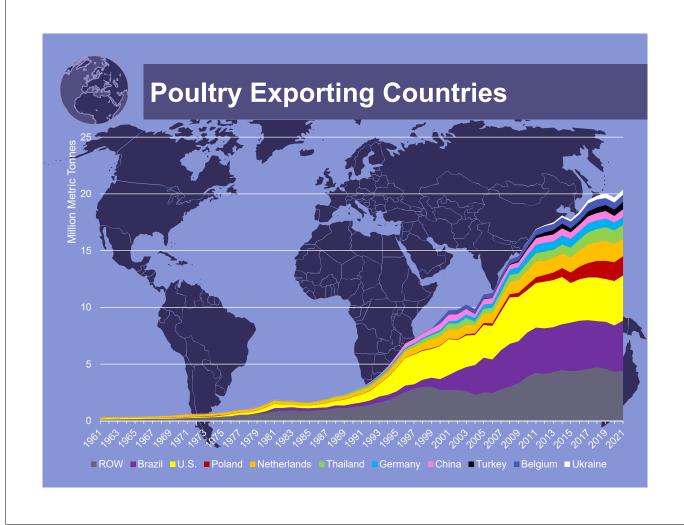
- U.S. produces about 10% of the world's pork
  - Roughly 22% of U.S. production is exported
- Major exporters are U.S., Spain, Germany, Canada, and Denmark
  - Top ten countries market share is about 85% of exports
- Major importers are China, Mexico, Japan, Italy, and Germany
  - Top ten countries market share is about 65% of imports
- Fresh and Chilled Boneless and with the bone are about equal in trade volume and value
  - Trade growth of 4.5% pork with the bone annually since 2000
  - Fresh and Chilled with Bone trade has grown by 5.4% since 2000



# Top Chicken Producing Countries, 2021 Country Market Share United States 17.0% China 12.1% Brazil 12.0% Russia 3.8% Indonesia 3.2% Market Share of top 5 producing countries – 48.1% Market Share of top 10 producing countries – 59.8%



Country	Market Share
China	7.6%
apan	6.8%
Mexico	6.1%
letherlands	4.8%
Inited Kingdom	4.5%
orket Share of top 5 im	porting countries – 3



#### **Top Poultry Exporting Countries, 2021**

Country	Market Share
Brazil	21.6%
United States	19.6%
Poland	8.3%
Netherlands	7.6%
Thailand	6.0%

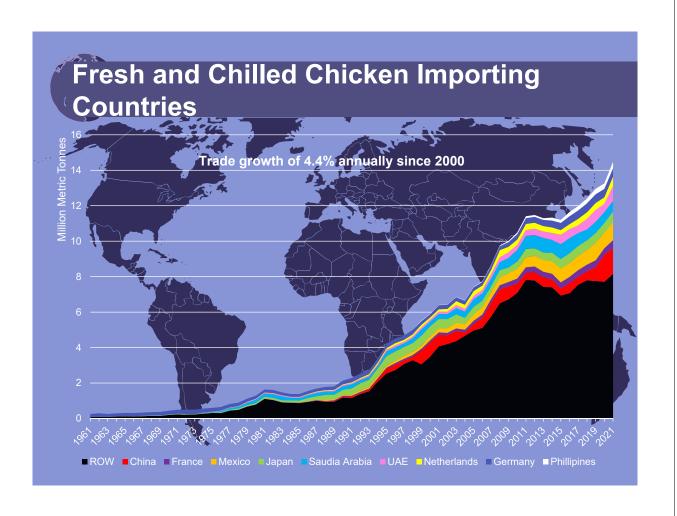
Market Share of top 5 exporting countries – 63.1%

Market Share of top 10 exporting countries - 78.3%

#### **World Poultry Trade Types, 2021**

Country	Quantity Share	Value Share
Meat of Chicken Fresh or Chilled	74.5%	65.4%
Poultry Meet Preparations	11.0%	23.4%
Meat of Turkeys Fresh or Chilled	4.6%	6.4%
Edible Offal Chicken or Guinea Fowl	3.7%	1.8%
Meat of Ducks Fresh or Chilled	0.9%	1.8%
Meat of Geese Fresh or Chilled	0.2%	0.6%
Edible Offal and Liver of Ducks	0.1%	0.3%

Chicken meat dominates

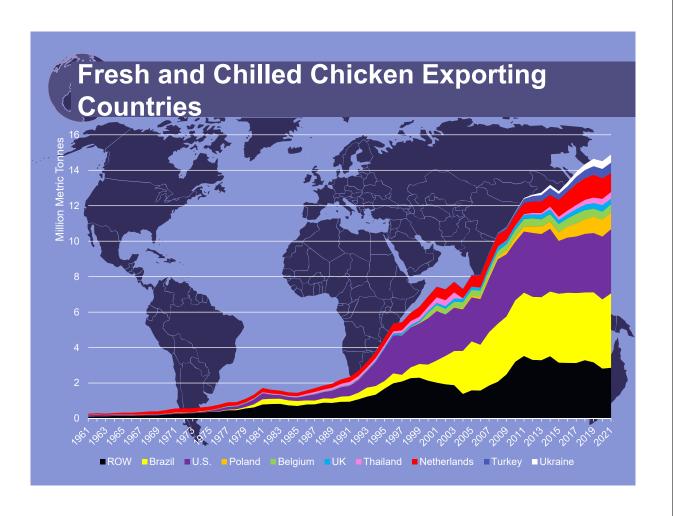


# Fresh and Chilled Chicken Importing Countries, 2021

Country	Market Share
China	10.1%
Mexico	7.1%
United Arab Emirates	7.0%
Saudia Arabia	5.7%
Japan	4.3%

Market Share of top 5 importing countries – 31.2%

Market Share of top 10 importing countries - 46.1%



# Fresh and Chilled Chicken Exporting Countries, 2021

Country	Market Share
Brazil	28.2%
United States	24.3%
Netherlands	7.2%
Poland	6.3%
Turkey	4.0%

Market Share of top 5 exporting countries – 69.9%

Market Share of top 10 exporting countries - 82.6%



#### **Poultry Analysis**

- U.S. produces about 17% of the world's poultry
  - More than 19% of U.S. production is exported
- Major exporters are Brazil, U.S., Poland, Netherlands and Thailand
  - Top ten countries market share is about 78% of exports
- Major importers are China, Japan, Mexico, Netherland, UK
  - Top ten countries market share is about 54% of imports
- Poultry trade has increased by 4.4% since 2000
- Chicken fresh or chilled represents the bulk to trade in quantity and value
- Fresh and chilled chicken trade has increase by 4.4% annually since 2000



#### Conclusions

- Meat Sector is not as concentrated as crop sector
- U.S. is a major producer and trader of beef, pork, and poultry
- Brazil and China are also a major producer of livestock products
- Trade continues to grow annually since 2000.
  - 2.9% for beef (about 14.5 million metric tonnes)
  - 4.7% for pork (almost 17 million metric tonnes)
  - 4.4% for poultry (above 19 million metric tonnes)