

**Foreign Agricultural Service  
Dairy, Livestock, and Poultry Division  
December 2001**

---

# **Overview of the World Broiler Situation**

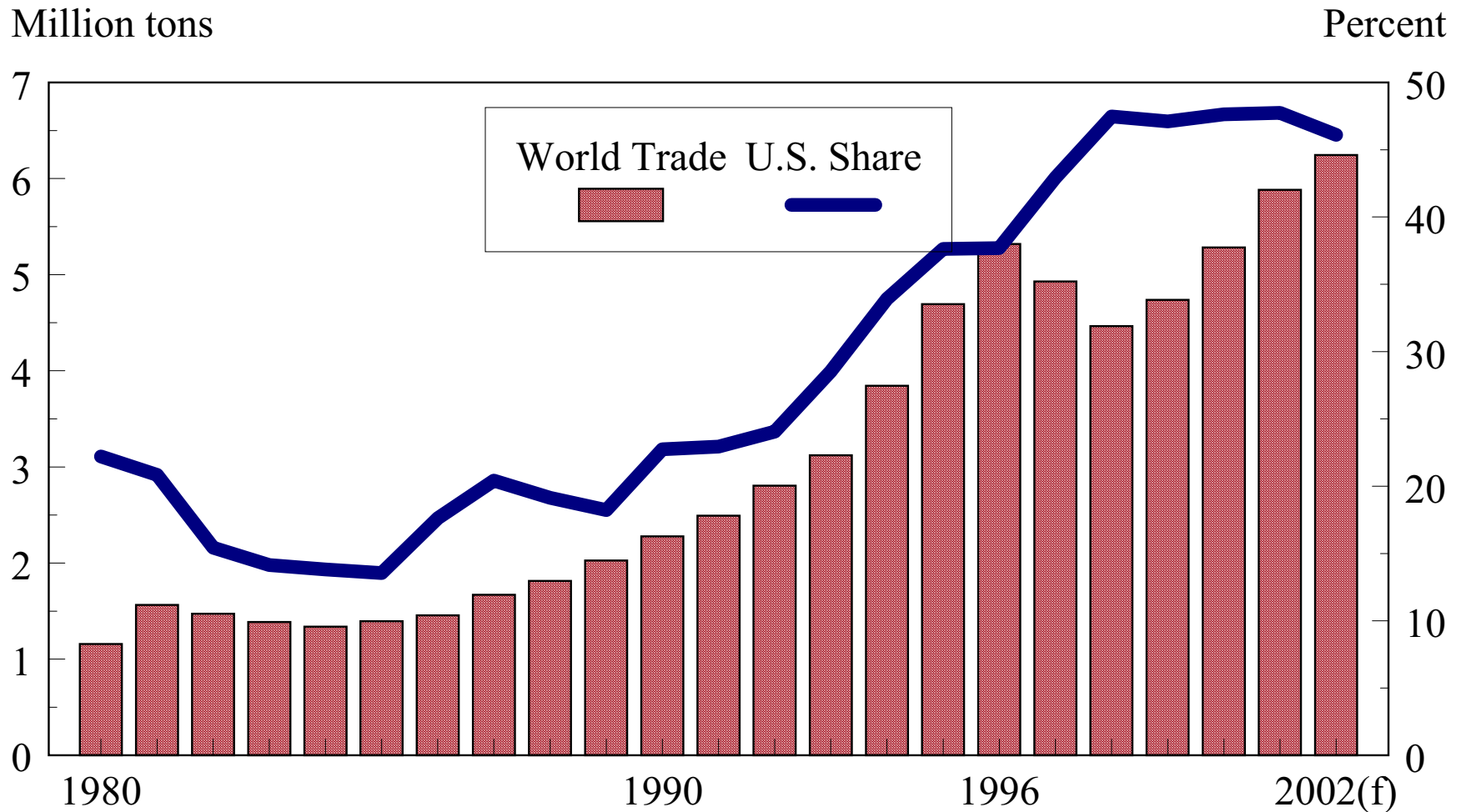


# Overview of World Broiler Situation

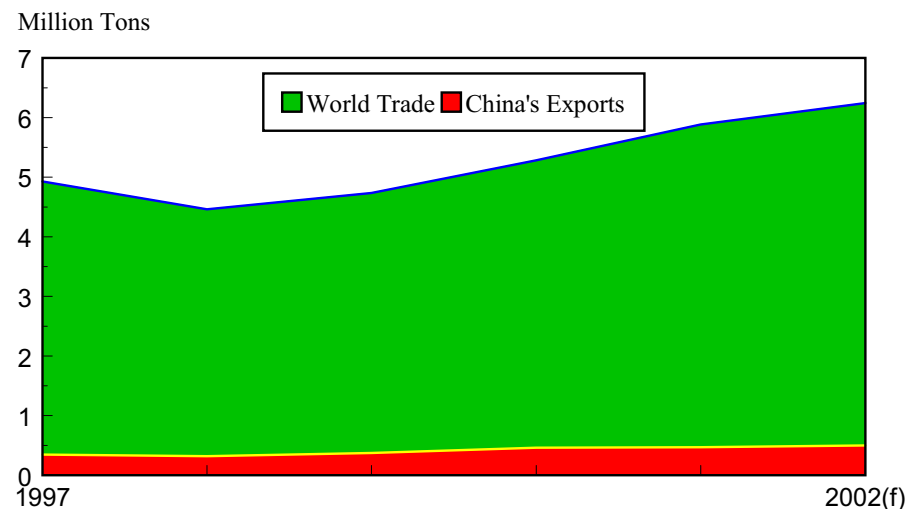
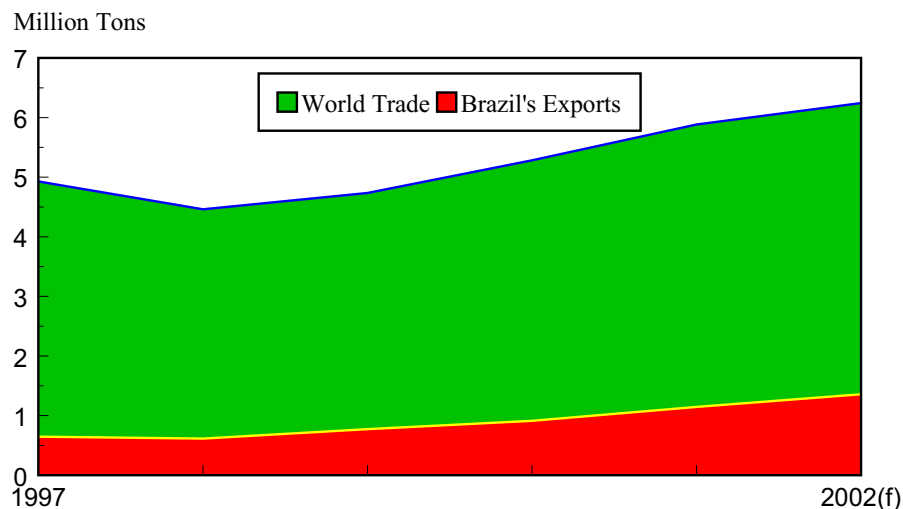
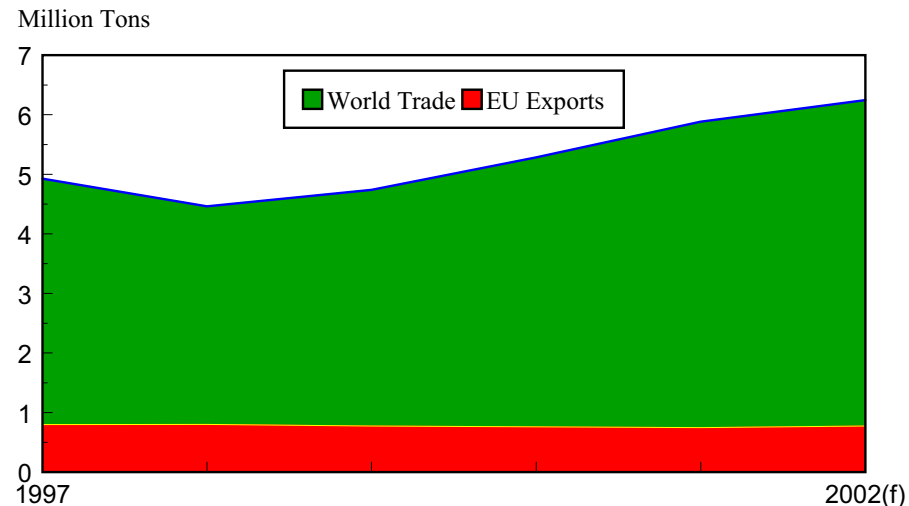
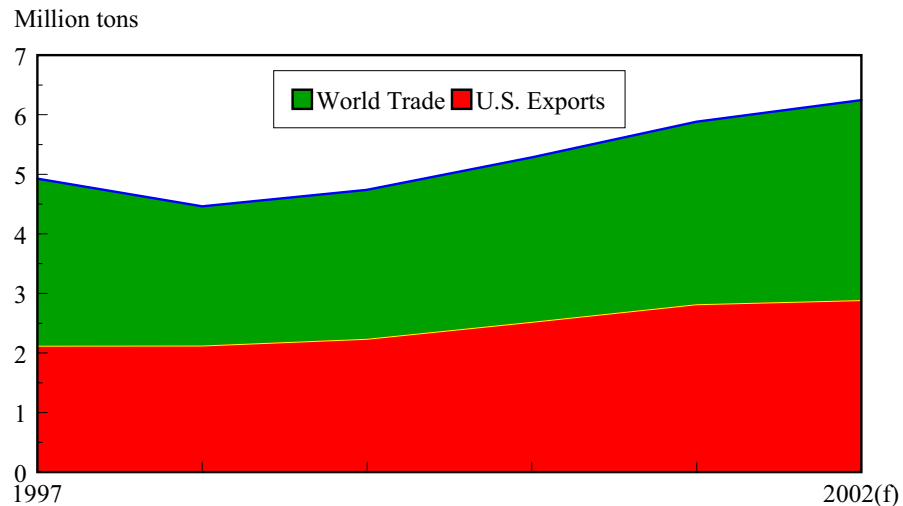
---

- Overview of U.S. Position in World Trade
- Composition of World Broiler Trade
- Exporters:
  - United States
  - European Union
  - Brazil
  - China
- Importers
  - Russia
  - China
  - Japan
  - Hong Kong
  - Mexico
  - European Union

# Will the U.S. Share Decline as Our Competitors Expand?



# Major Broiler Exports and the Portion of Total Trade They Represent

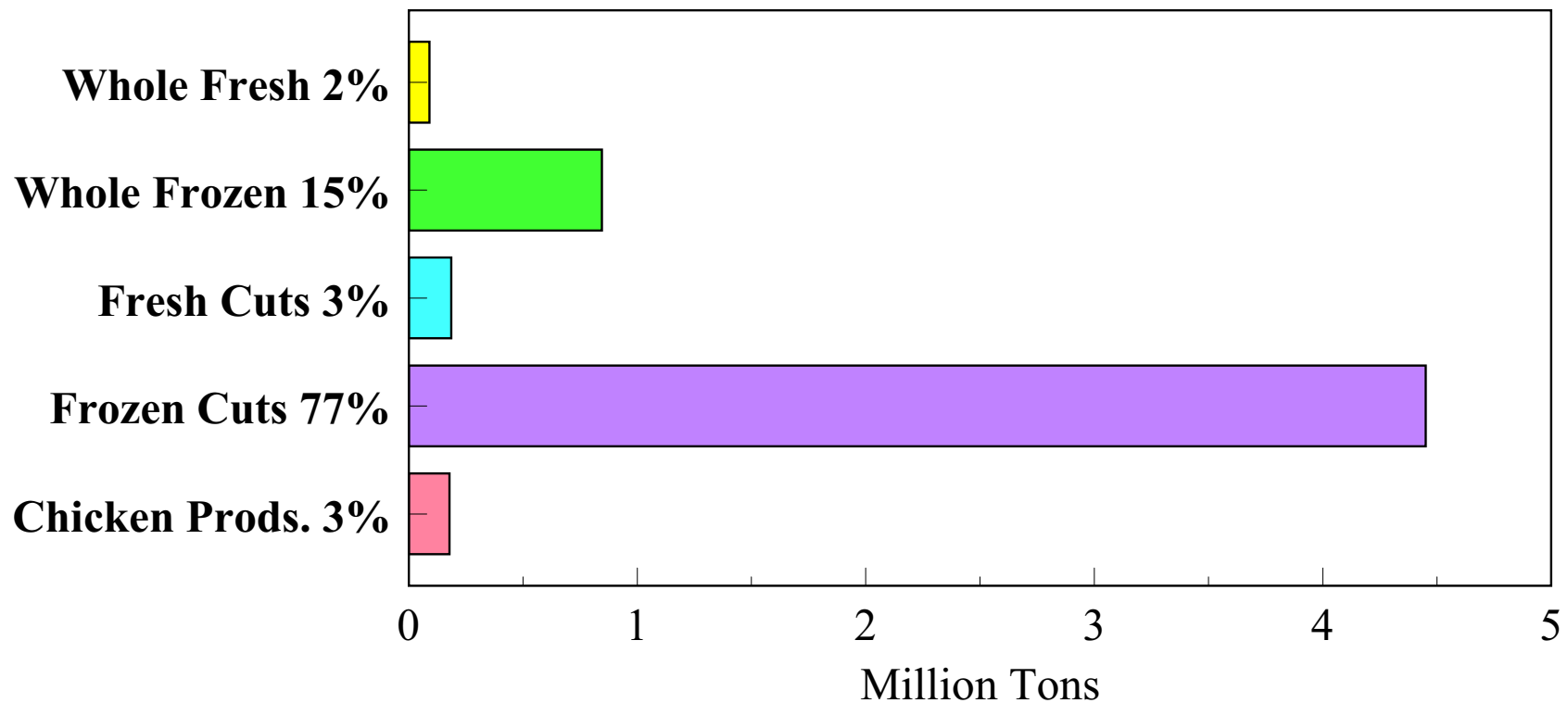


# Which Came First: Demand for Broiler Cuts or Excess Supply Needing to Find a Home?

## Total Broiler Meat Trade

5.8 Million Tons

CY 2000

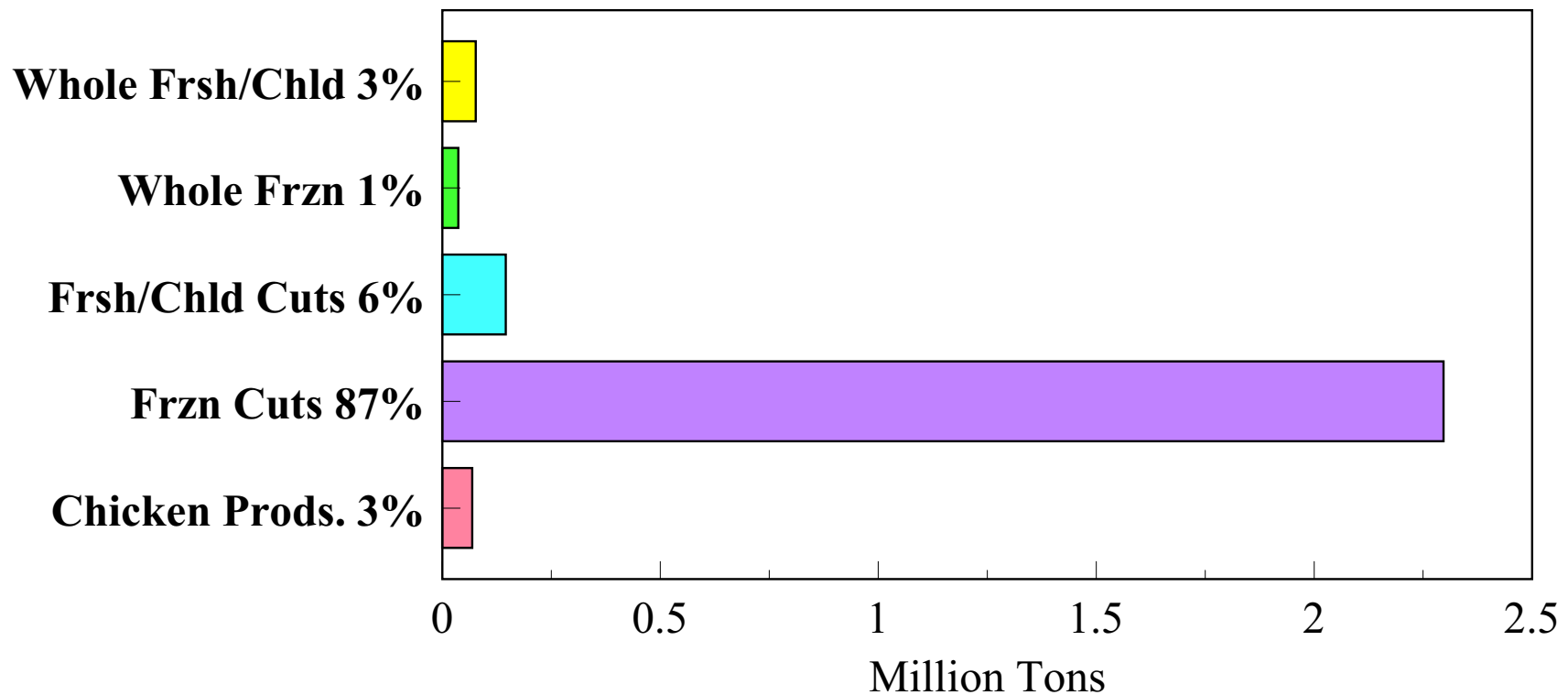


# U.S. Poultry Exports Focused on Broiler Cuts as a Result of Our Domestic Consumption Profile

## Total U.S. Broiler Exports

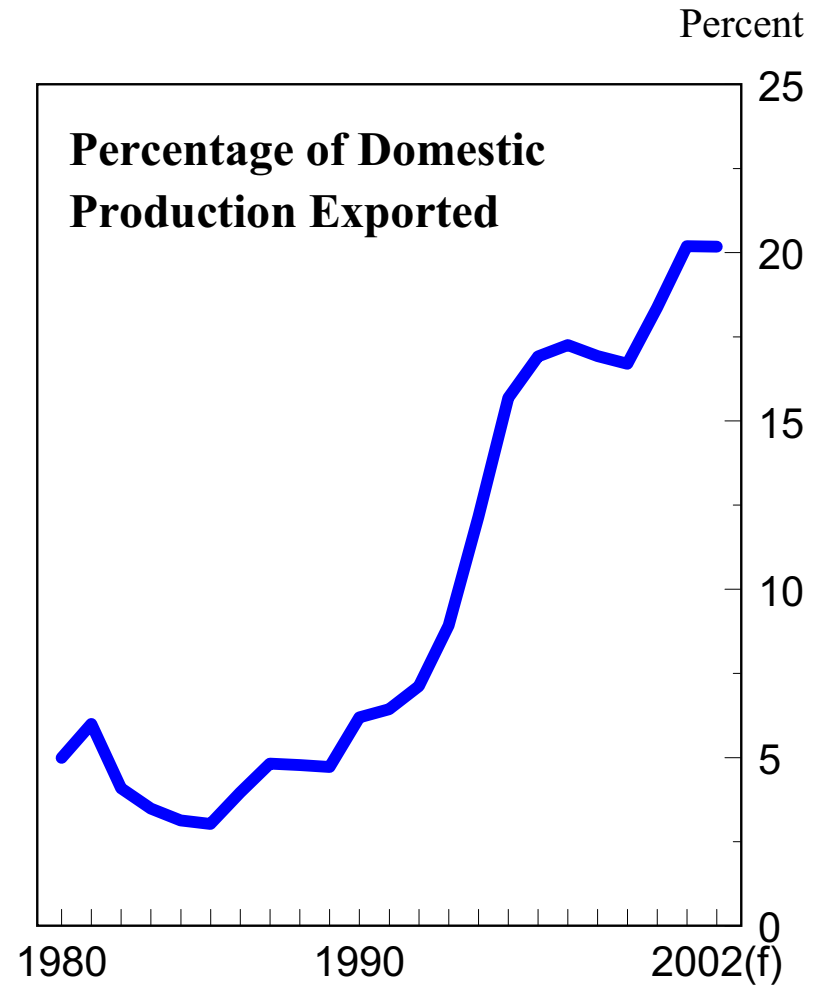
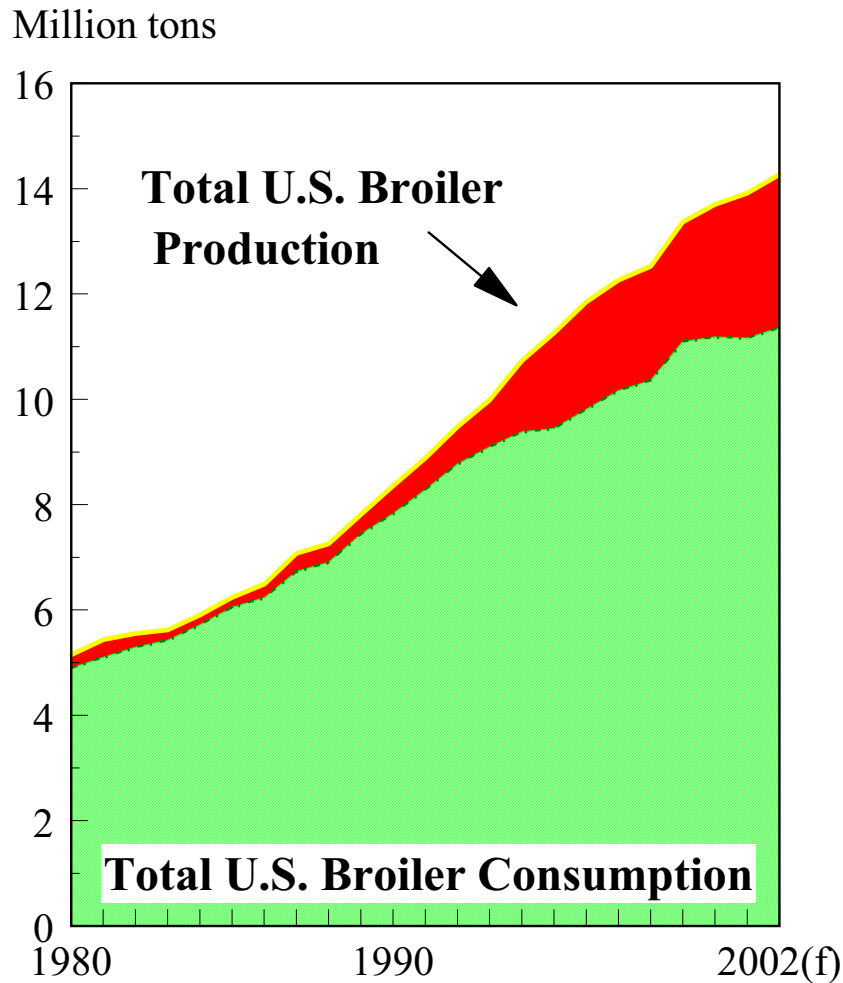
2.6 Million Tons

CY 2000



Leg Quarters represent 40% of all frozen cuts

# Exports Have Become a Critical Outlet for Increased U.S. Broiler Production

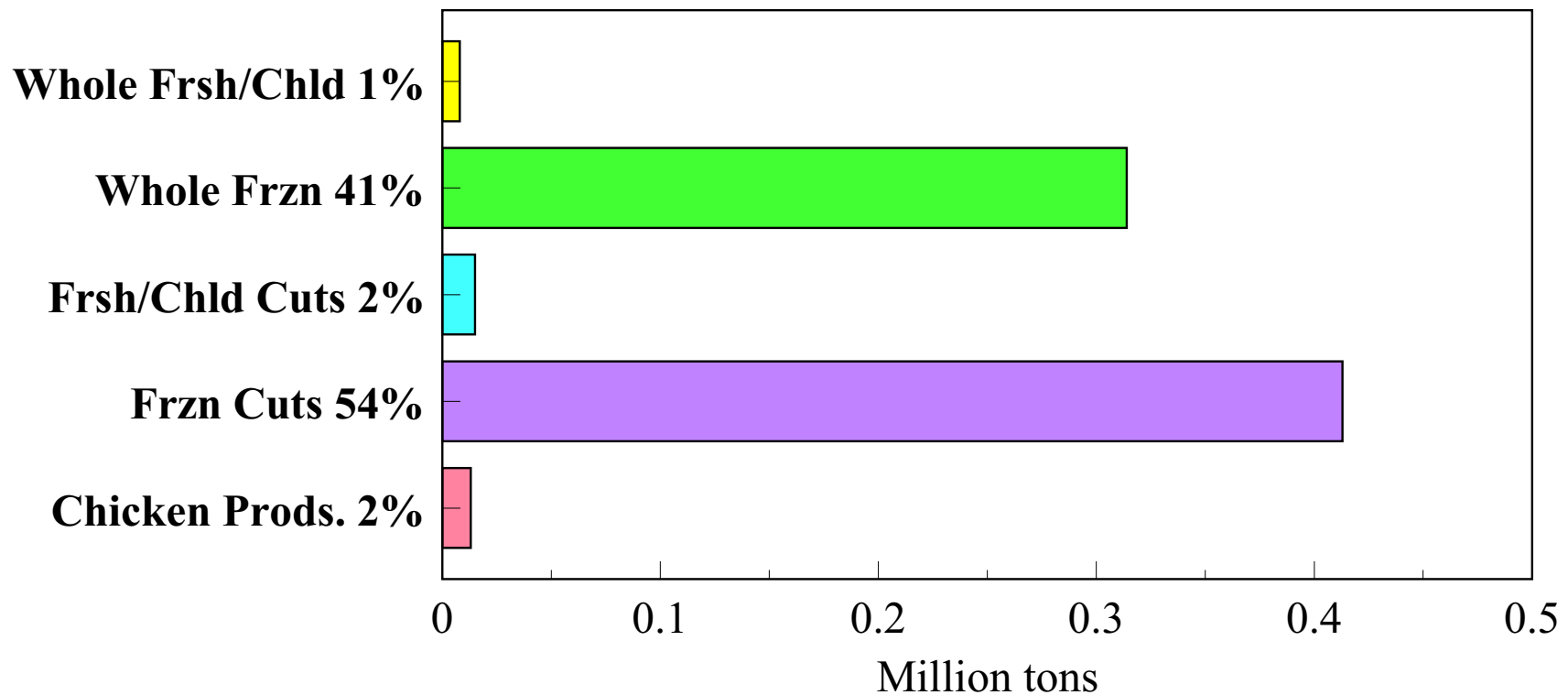


# EU Export Effort Evenly Spread Between Whole Birds and Broiler Cuts

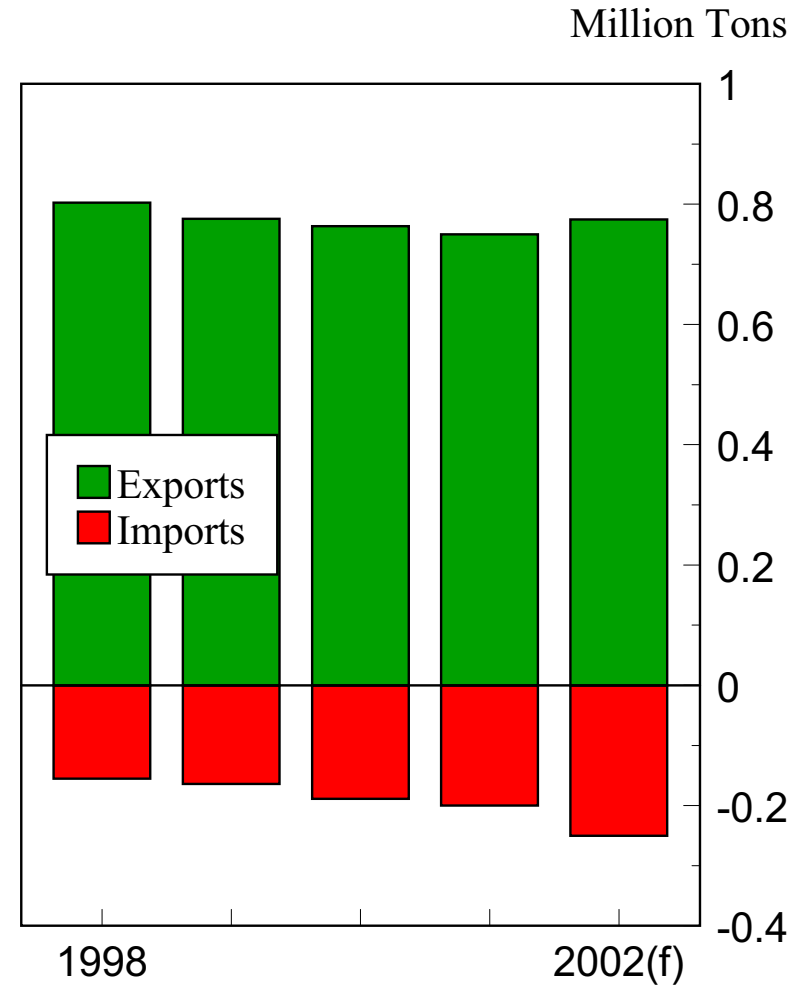
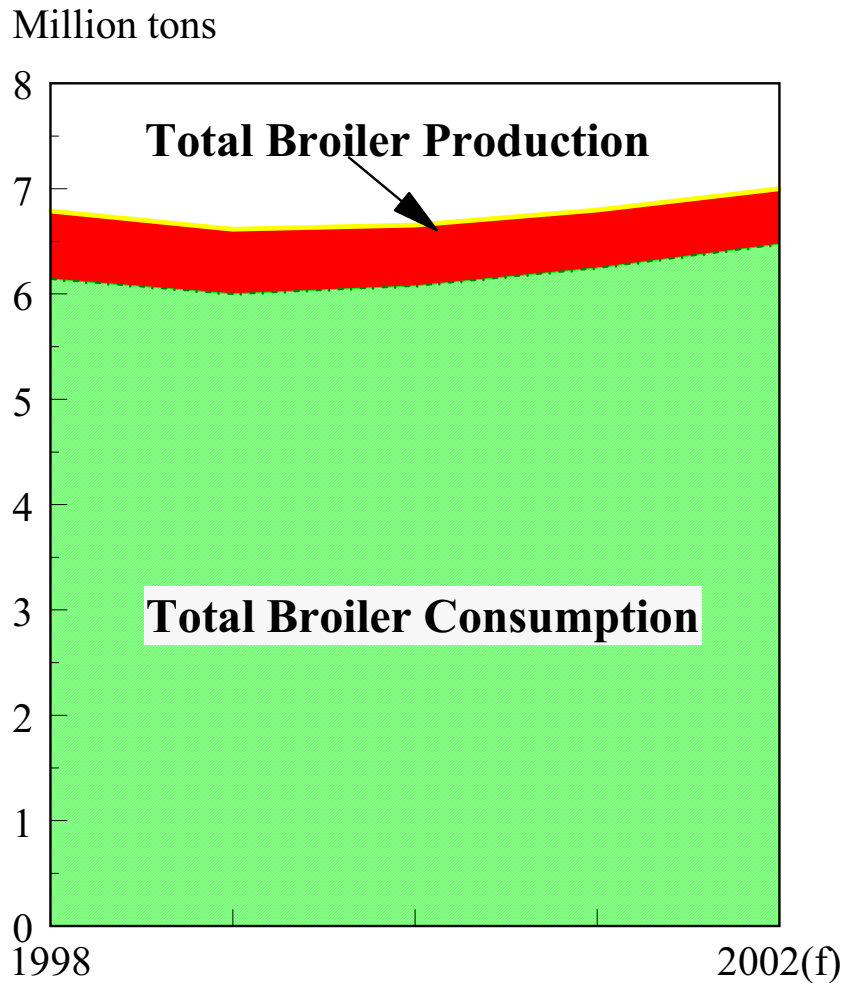
## Total European Union Broiler Exports

.764 Million Tons

CY 2000



# EU Exports of Broiler Meat Flat; EU not Participating in Recent World Market Growth

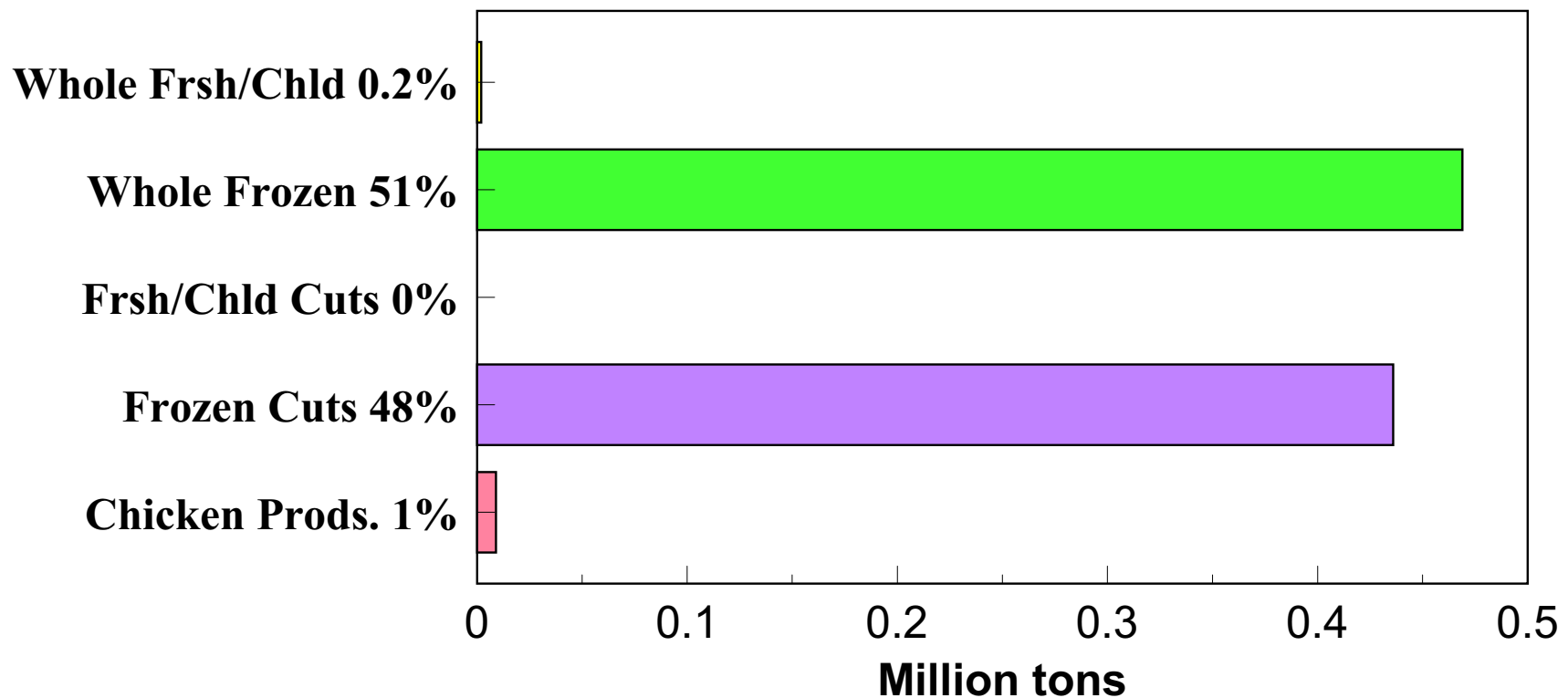


# Brazil, Like the EU, is Well Positioned to Meet Import Demand for Broiler Meat

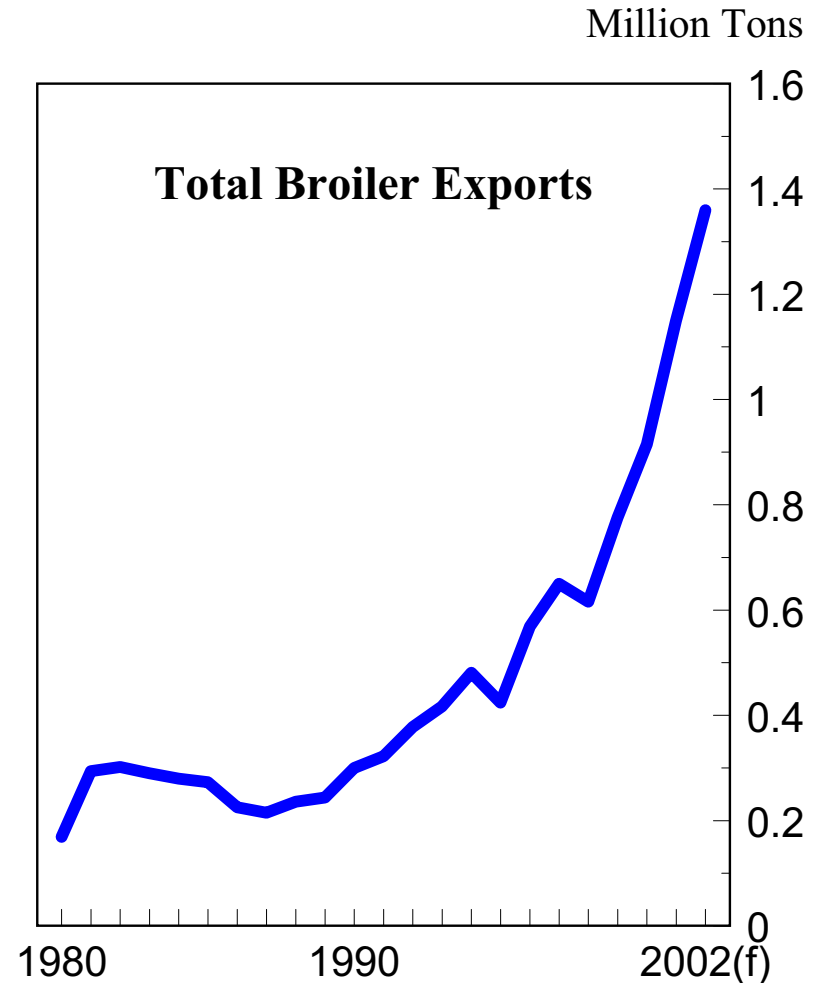
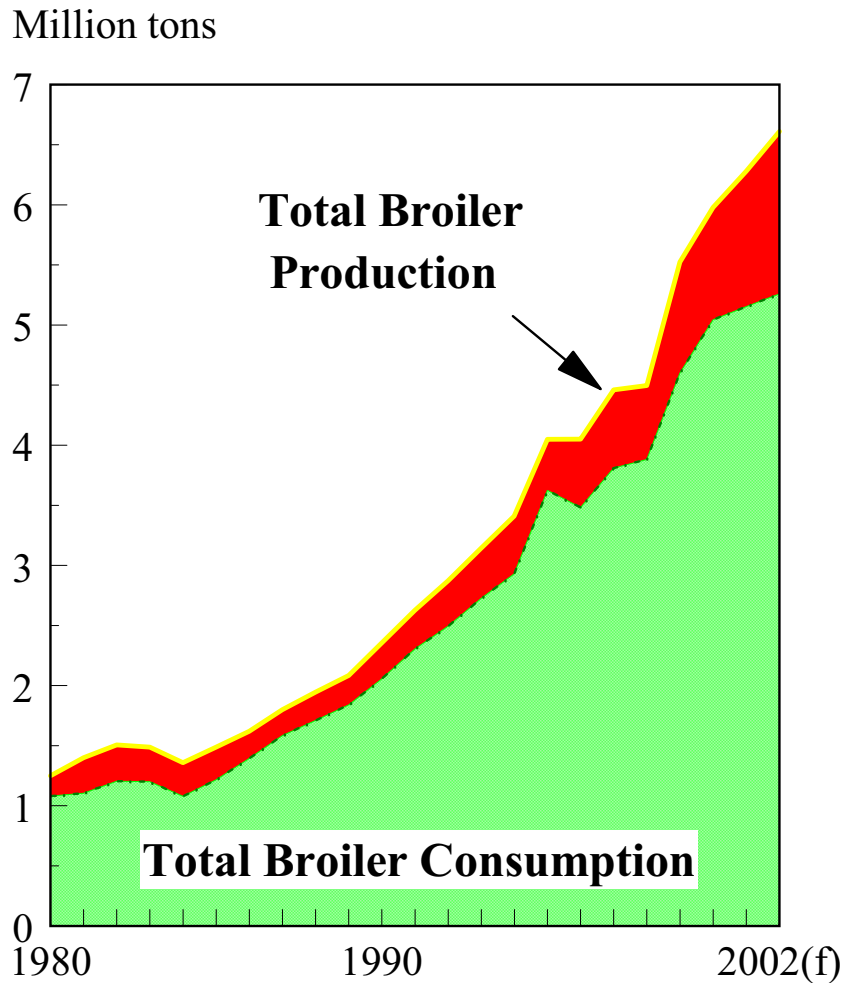
## Brazil's Total Broiler Exports by Type

.916 Million Tons

CY 2000



# Brazil's Broiler Exports are Forecast to Reach 1.3 Million Tons in 2002, a 50% Increase From 2000

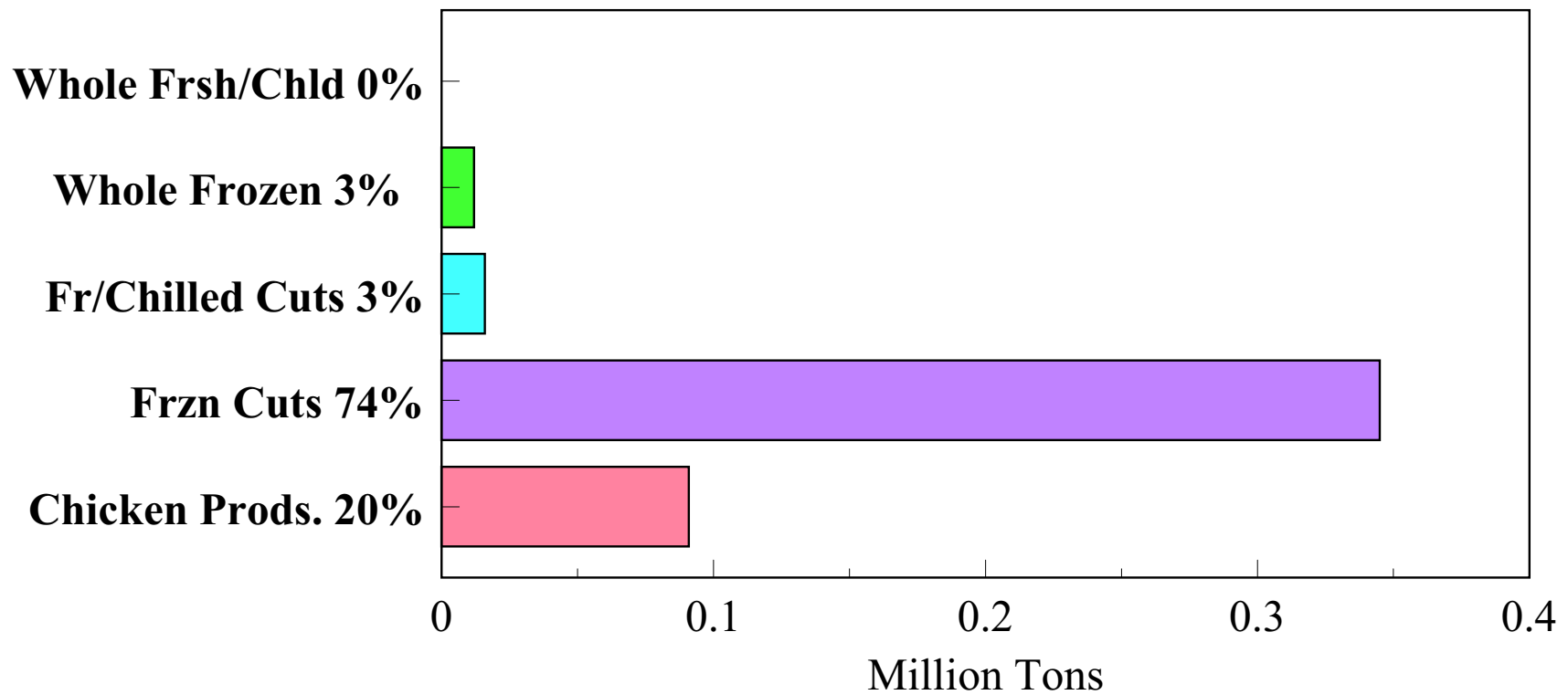


# China Focusing Broiler Exports on High-Value, Processed Products

## Total Broiler Exports

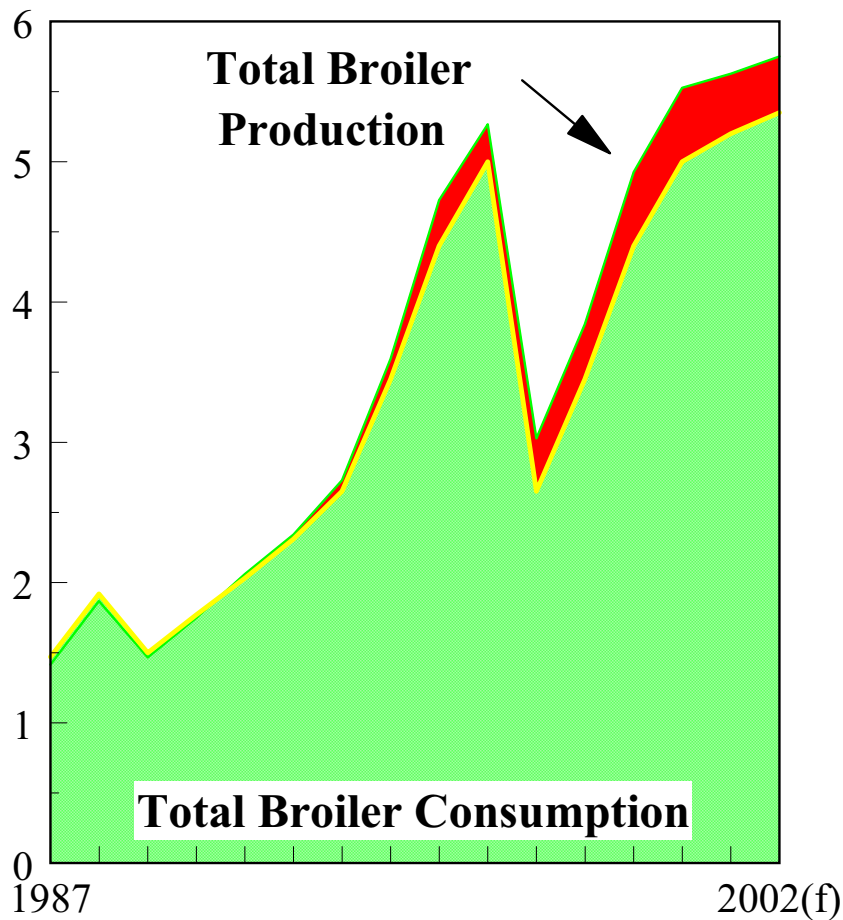
.464 Million Tons

CY 2000

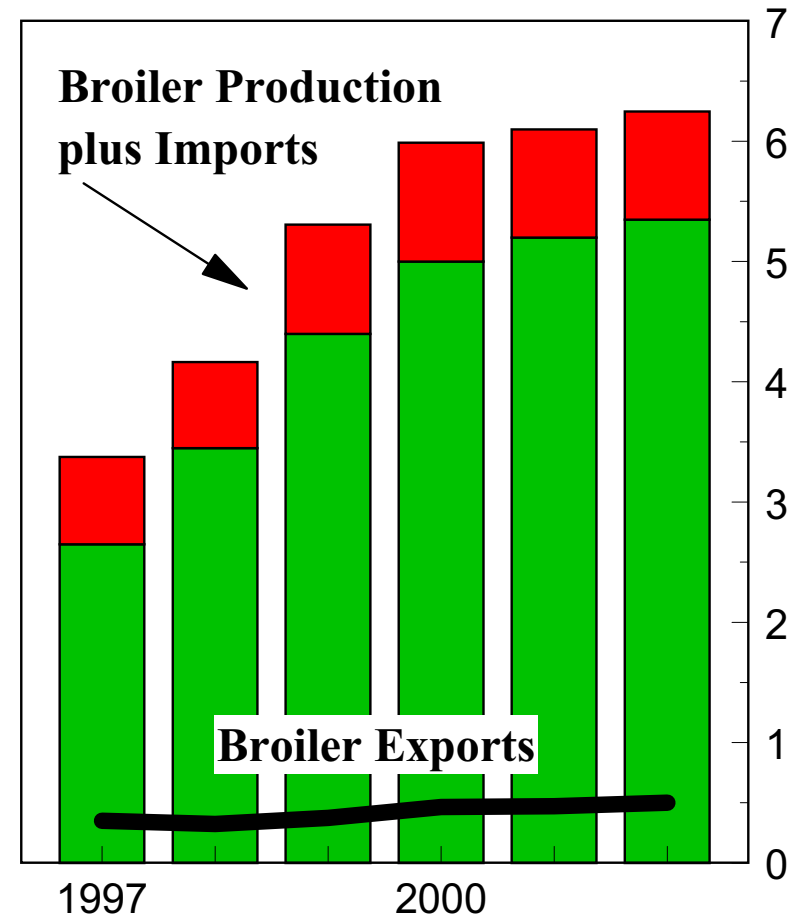


# China is Becoming an Important Import Market, but a Growing Competitor in Asian Markets

Million tons



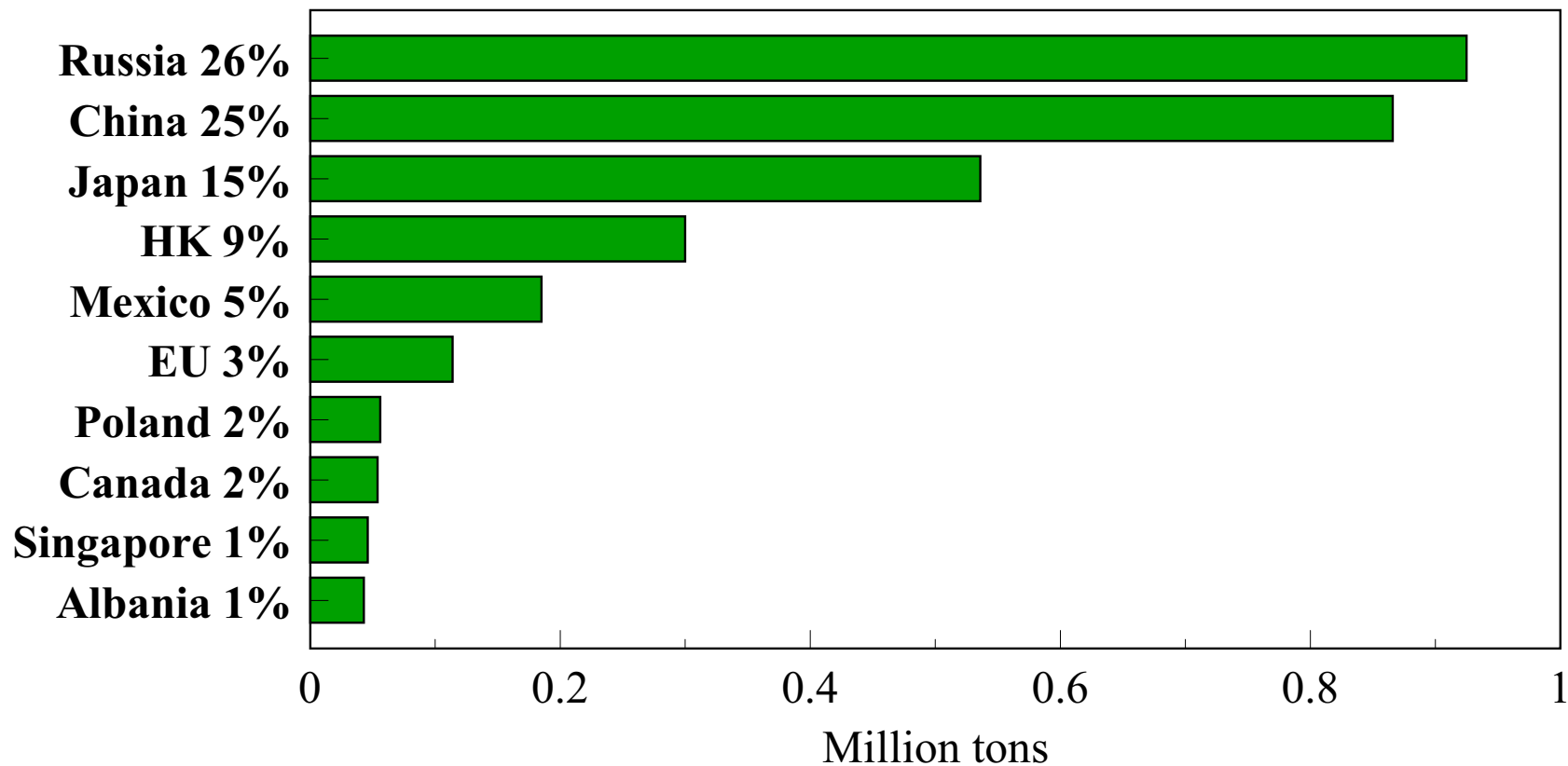
Million Tons



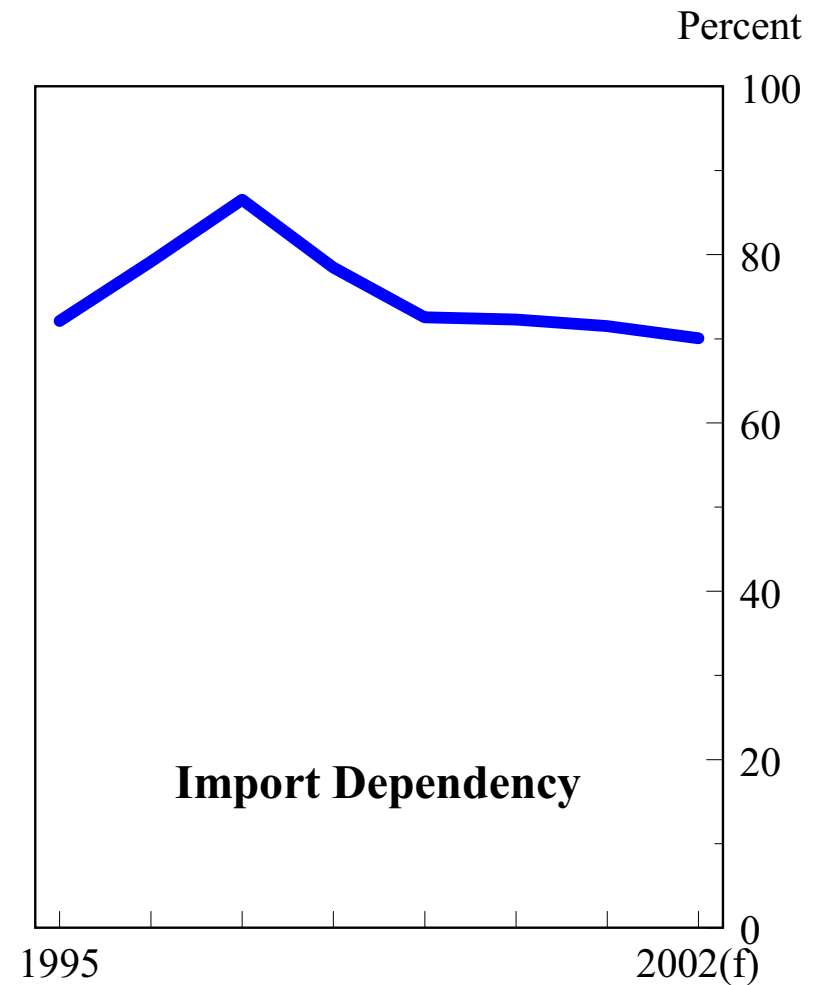
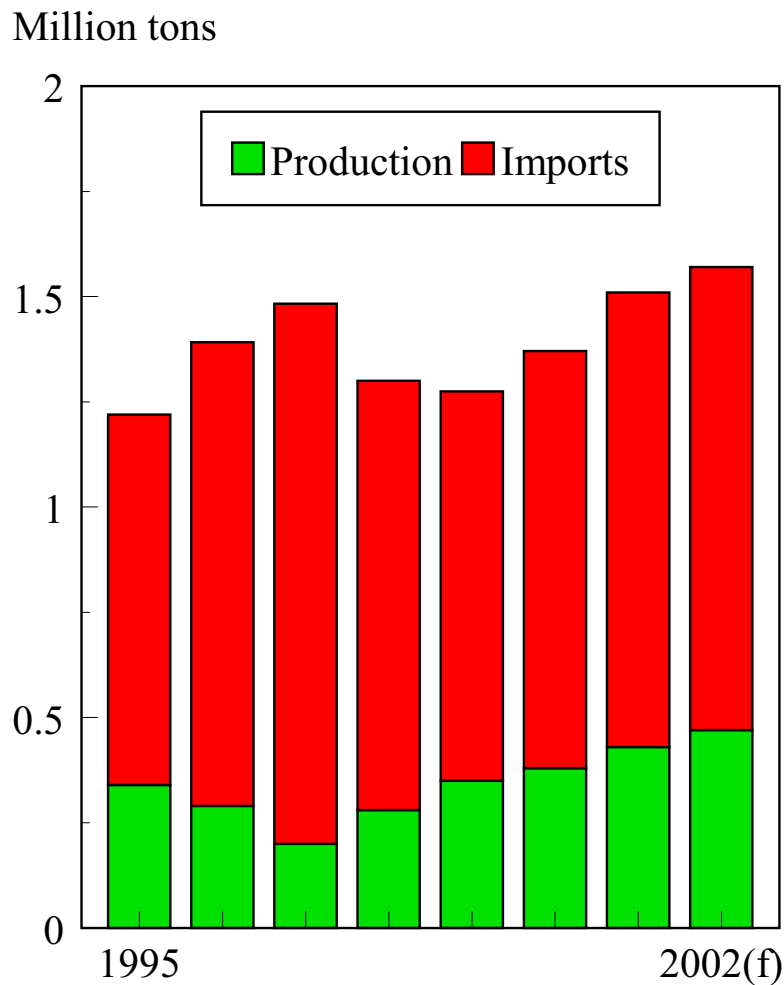
# Global Broiler Trade Rests on Two Shaky Pillars: China and Russia

## Top Ten Importers of Broiler Cuts from 1998-2000

Represents 90% of Market

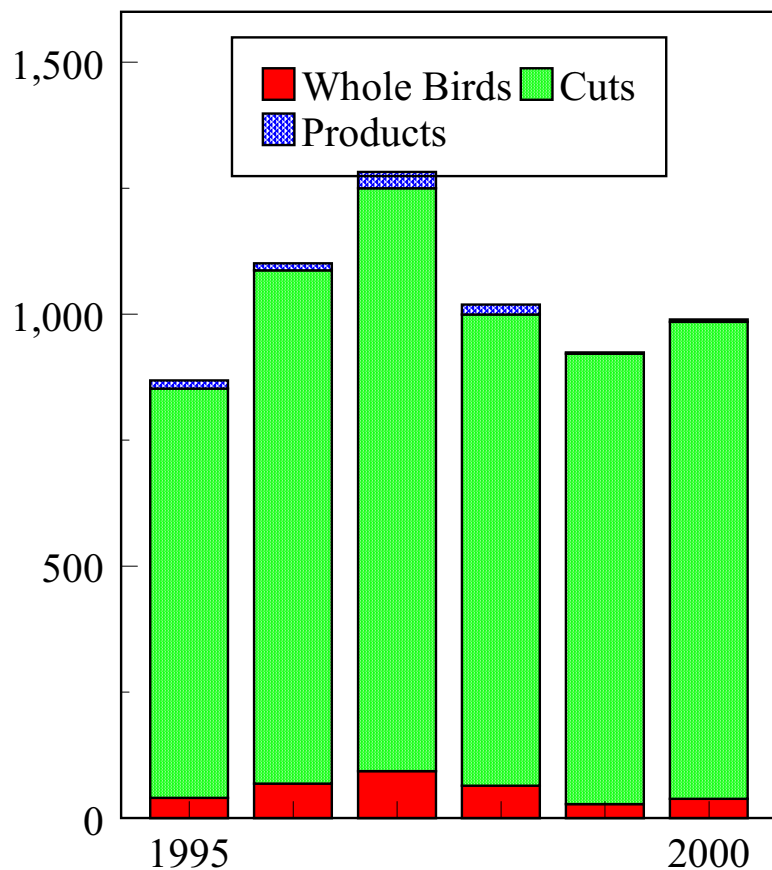


# #1 Russia: High Dependence on Imports, but Will There be Quotas?

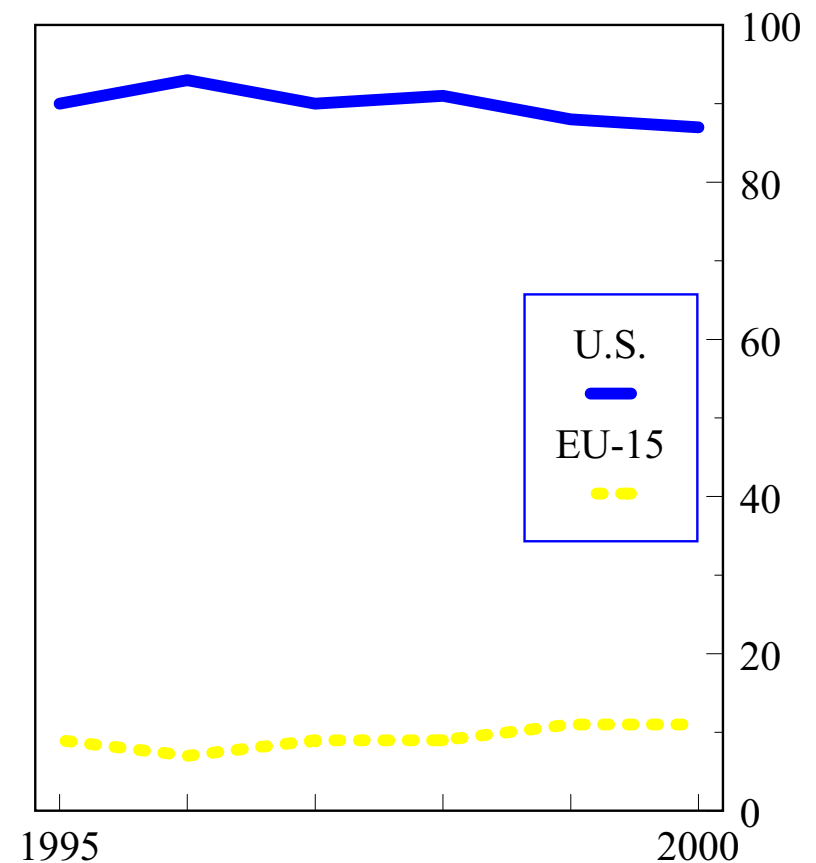


# U.S. Main Supplier of Broiler Cuts

**Russian Broiler Imports By Type**  
Thousand Tons

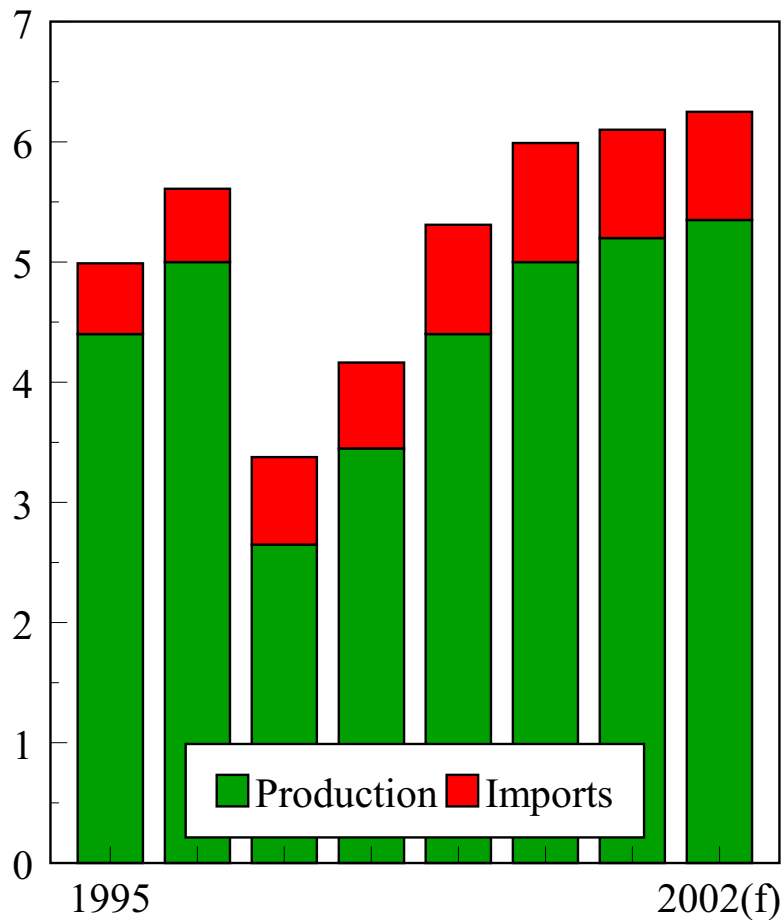


**Share of Russia's Broiler Cuts Market**  
Percent

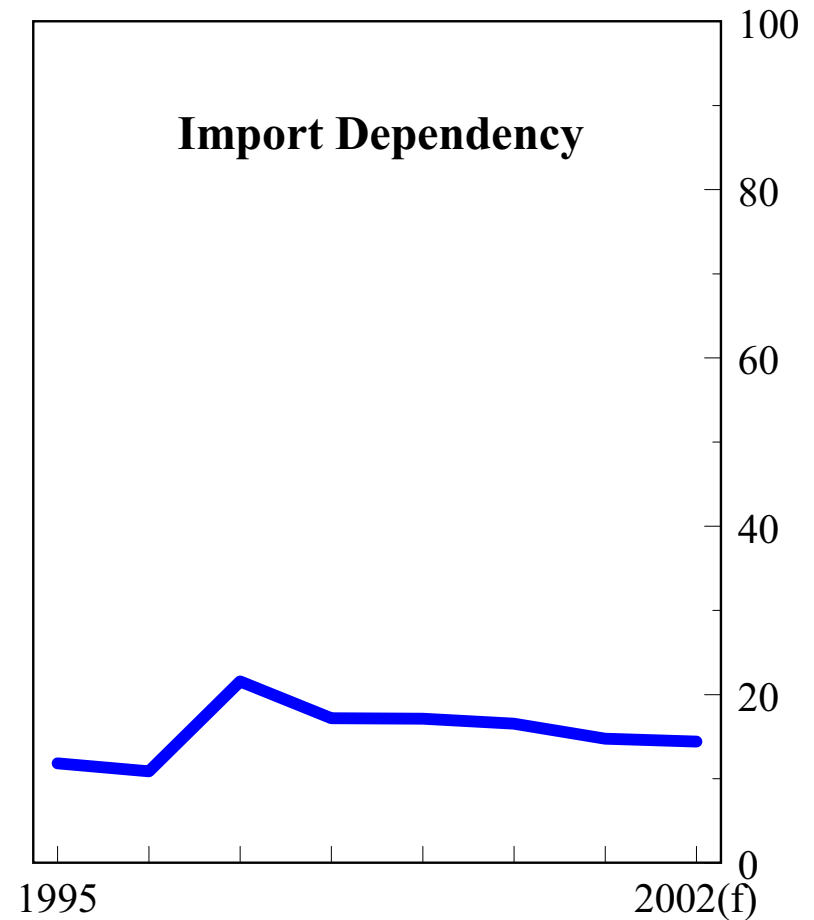


# #2 China: Growing Production and Low Dependence on Imports

Million tons



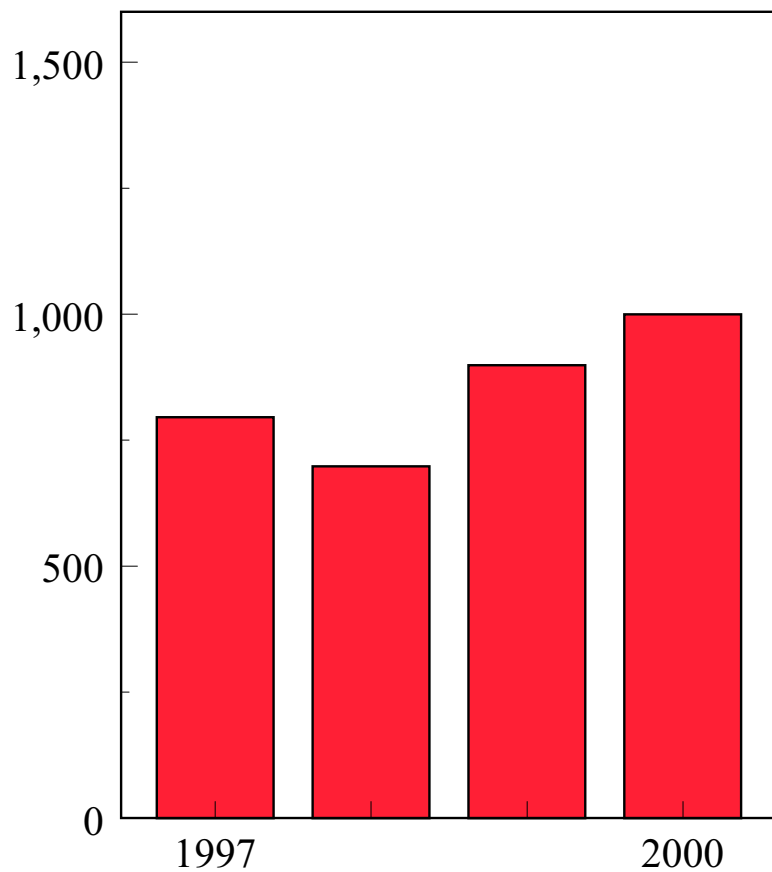
Percent



# U.S. Main Supplier of Broiler Cuts

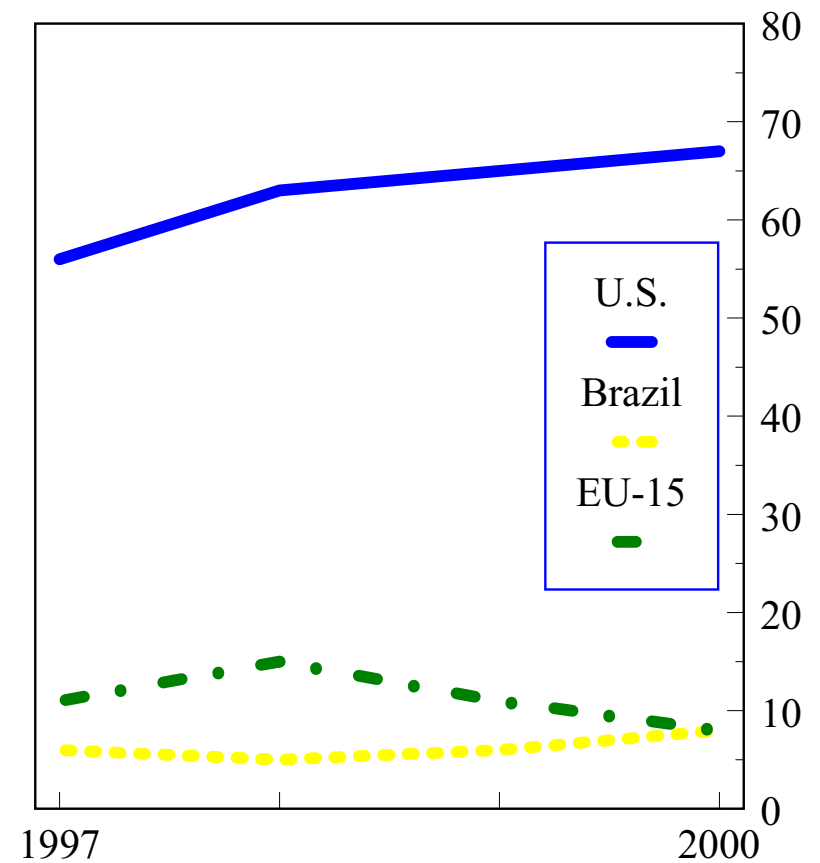
## Chinese Broiler Cuts Imports

Thousand Tons



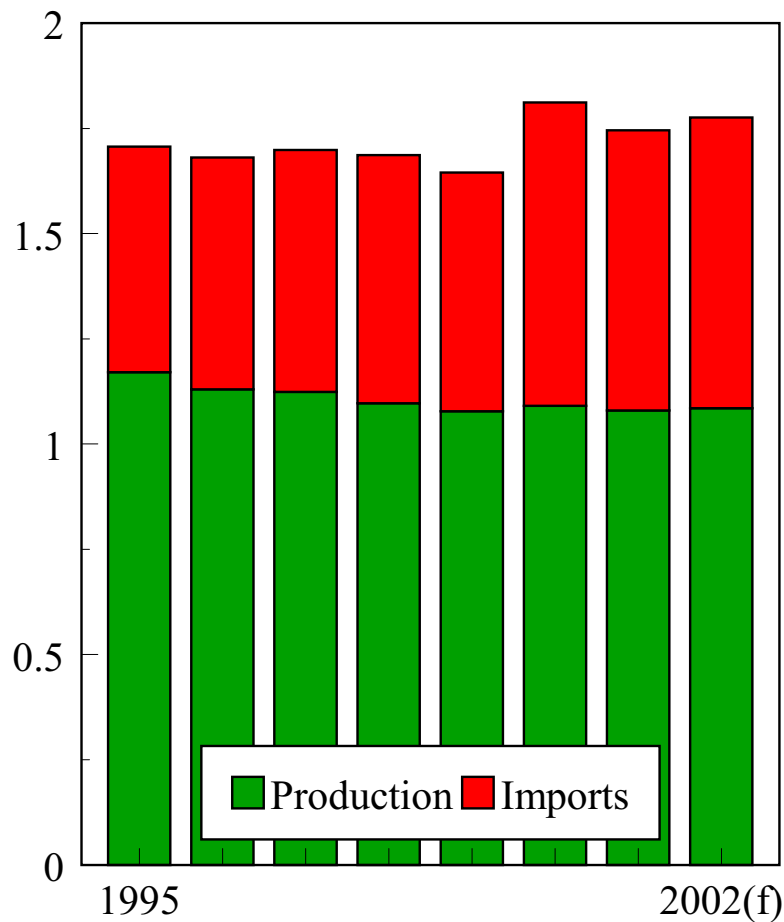
## Share of China's Broiler Cuts Market

Percent

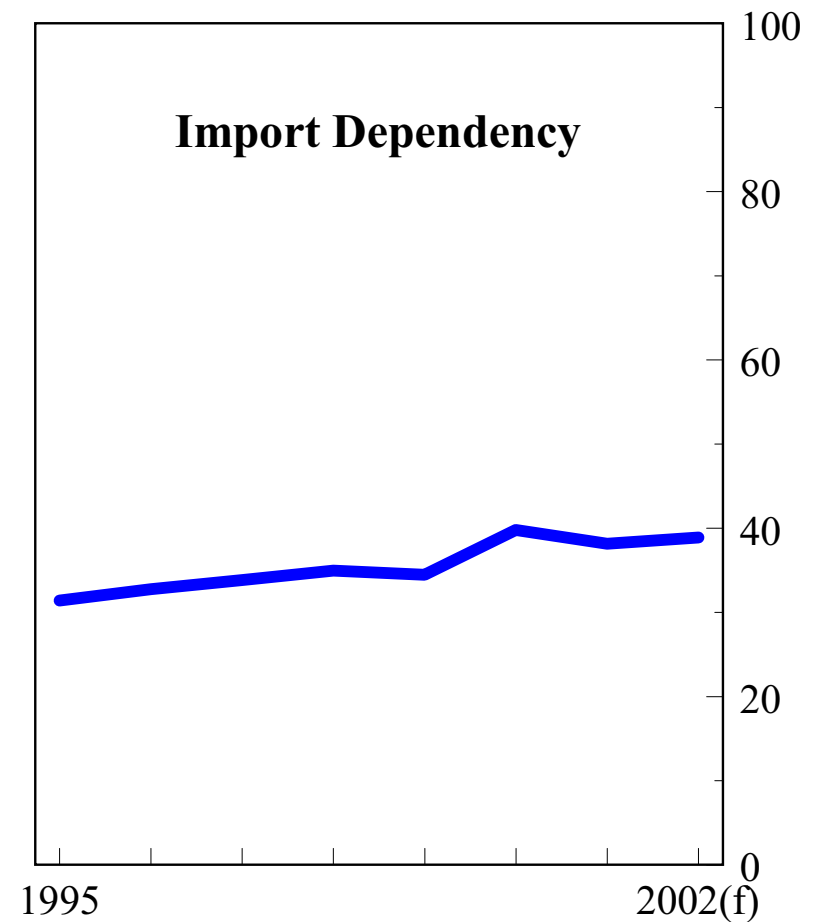


# #3 Japan: A Stable Market for Broiler Meat, Declining Domestic Production

Million tons

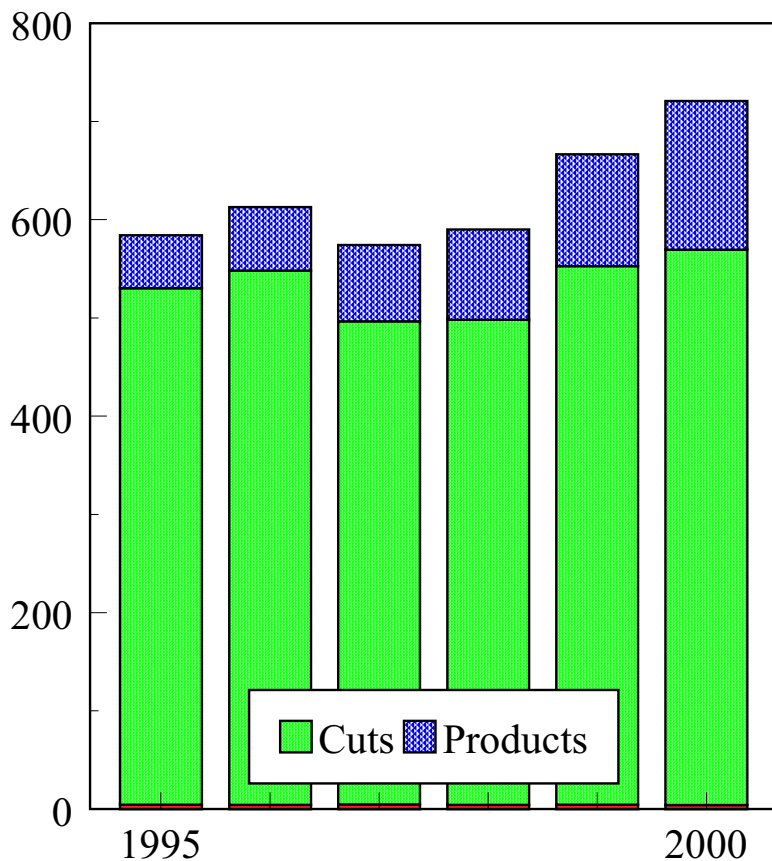


Percent

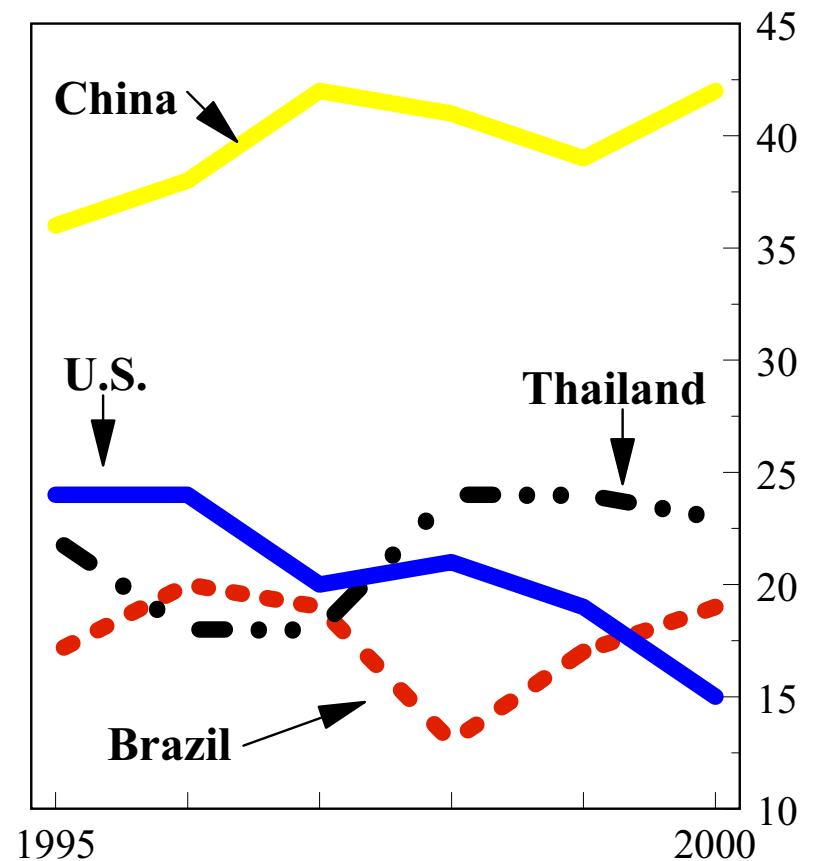


# China Main Supplier of Broiler Cuts; U.S. Position Slipping

**Japan's Broiler Imports By Type**  
Thousand Tons

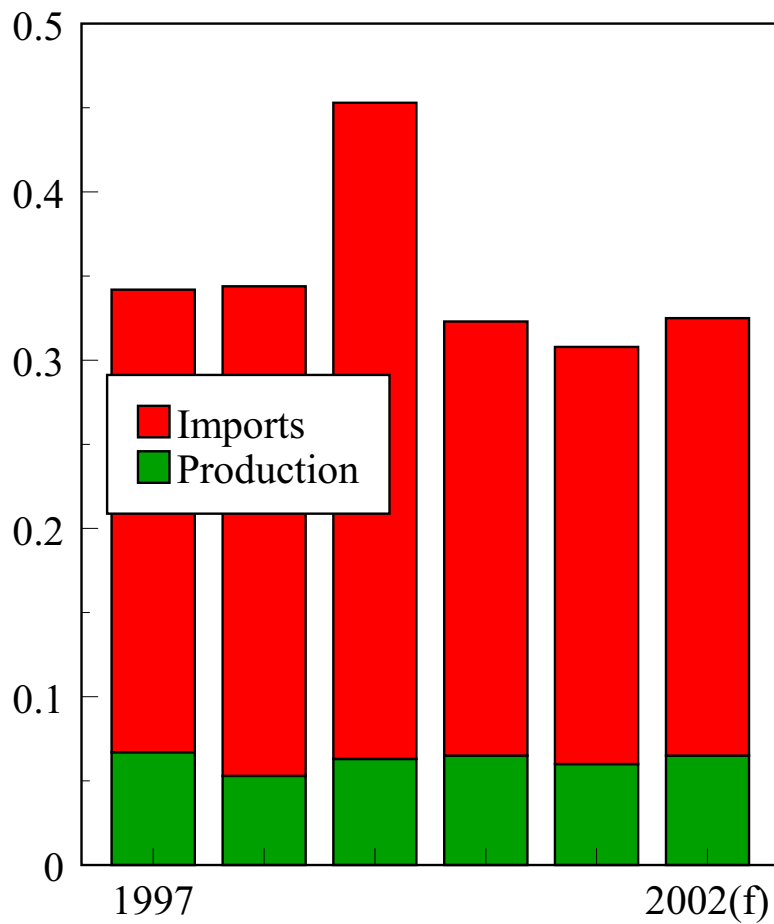


**Share of Japan's Broiler Cuts Market**  
Percent

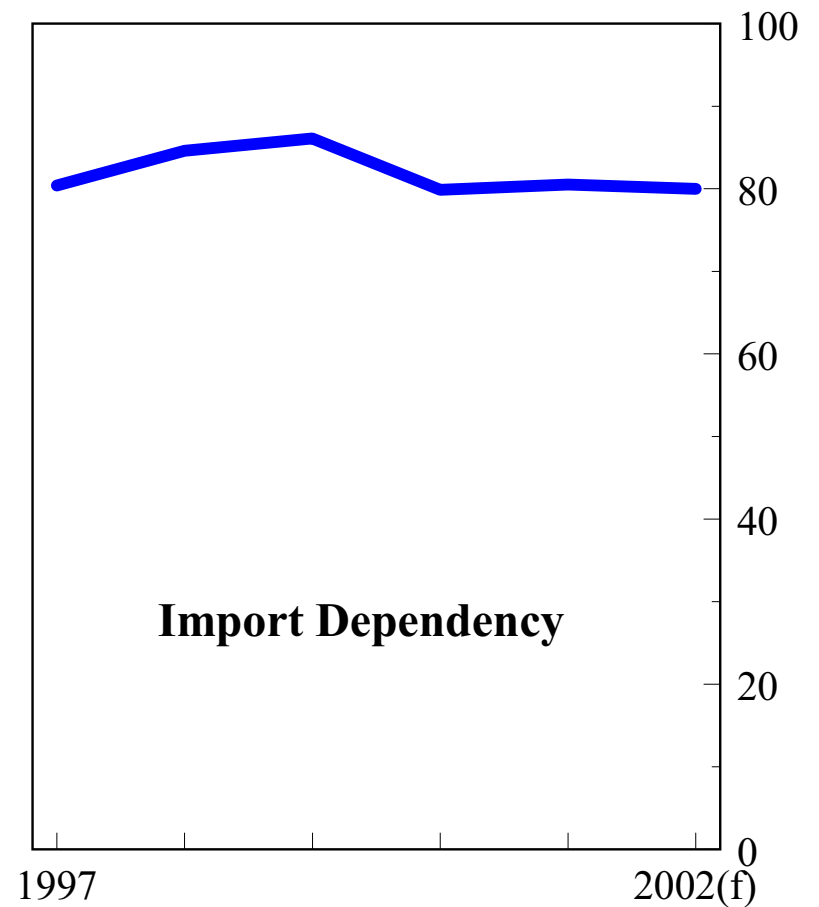


# #4 Hong Kong: High Dependence on Imports; Solid Market for Now

Million tons

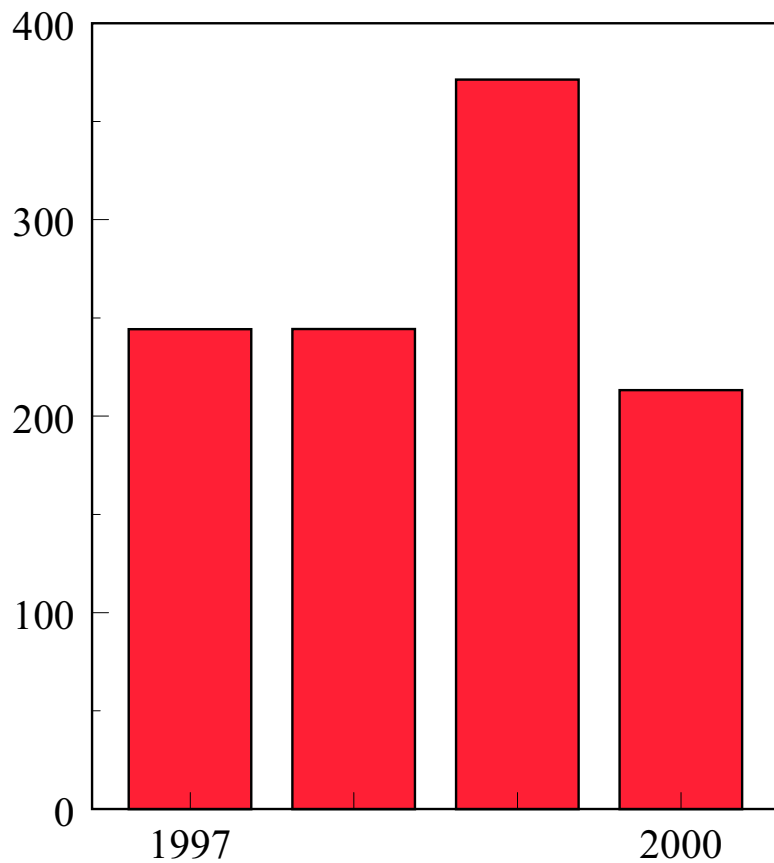


Percent

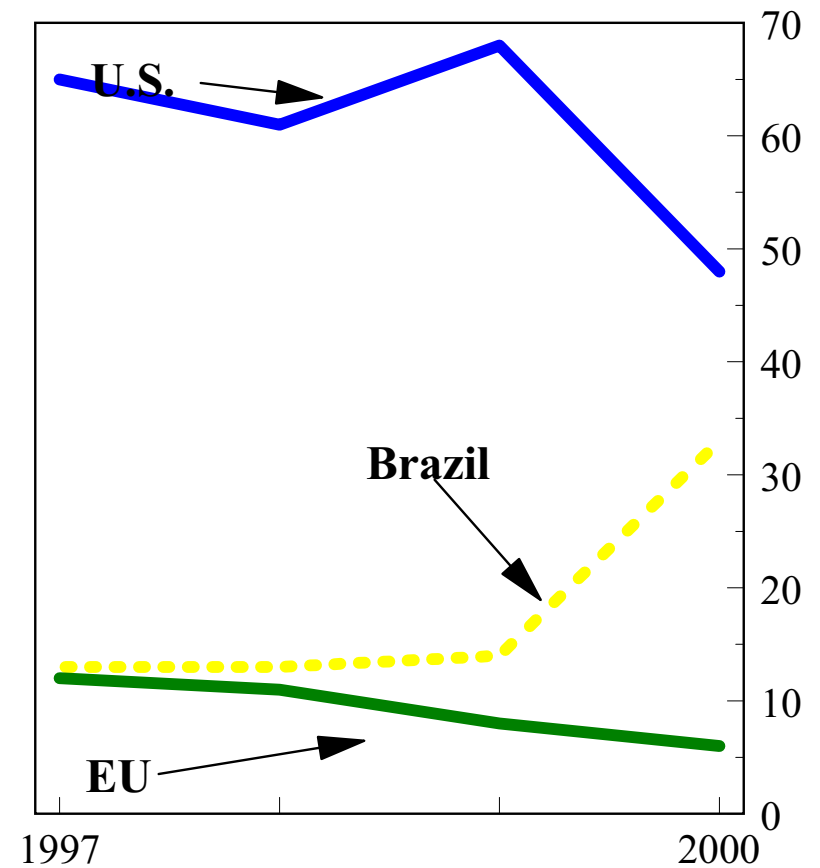


# U.S. Losing Market Share to Brazil

**Hong Kong's Broiler Cuts Imports**  
Thousand Tons

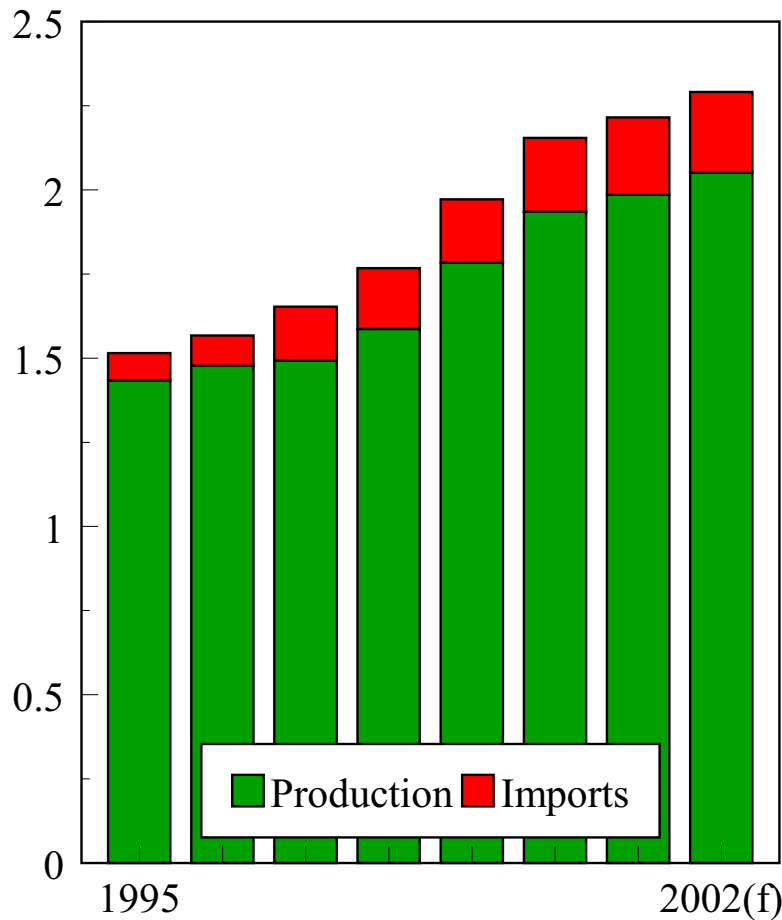


**Share of Hong Kong's Broiler Cuts Market**  
Percent

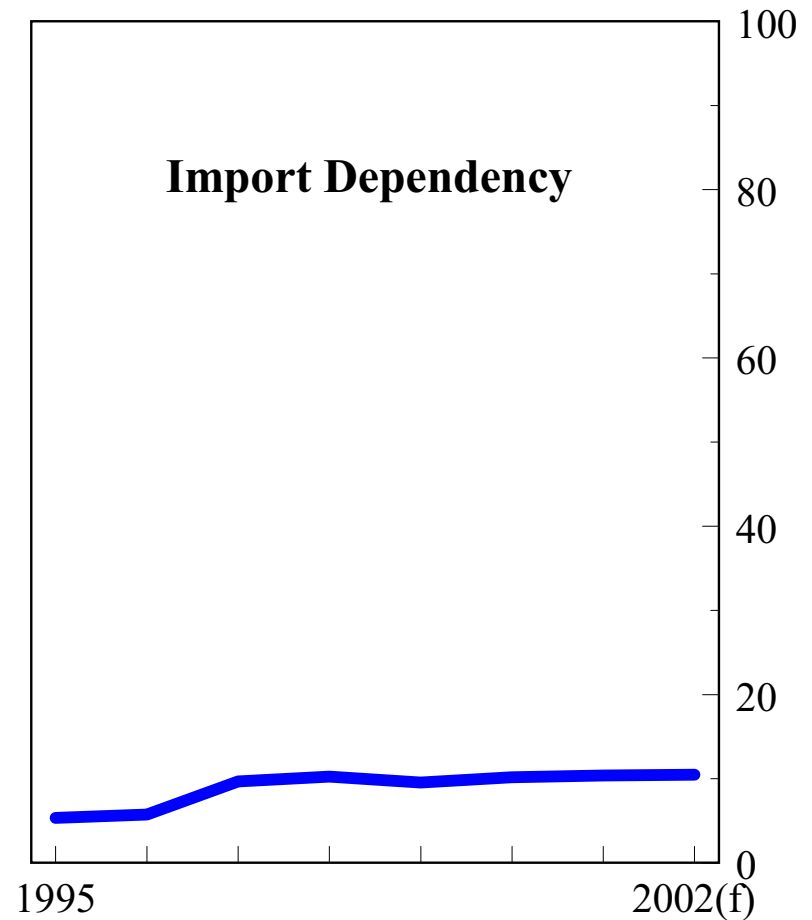


# #5 Mexico: Rising Consumption Being Met by Domestic Production

Million tons

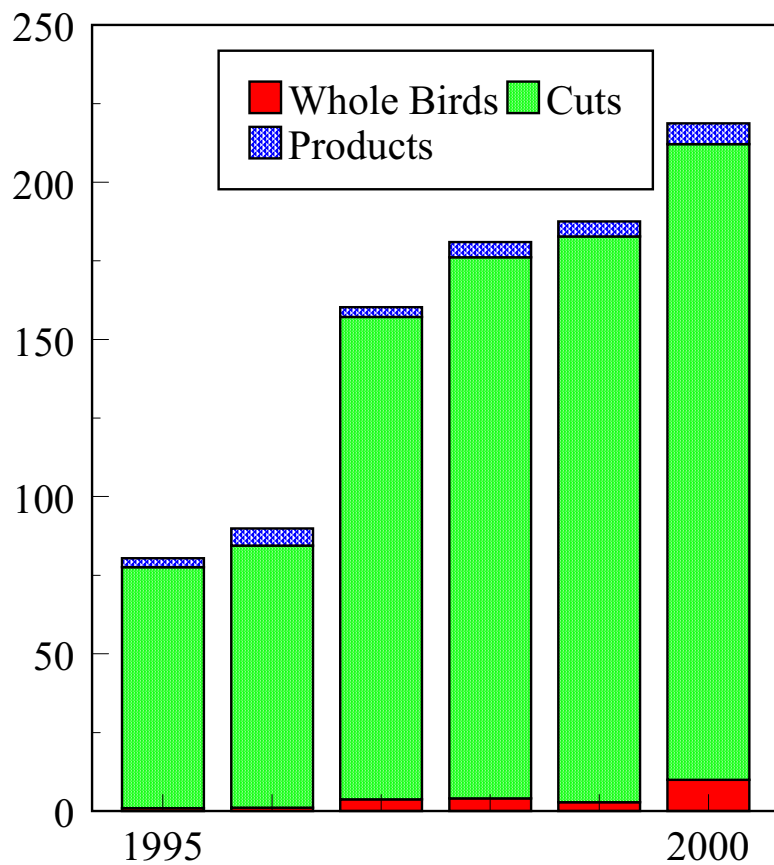


Percent

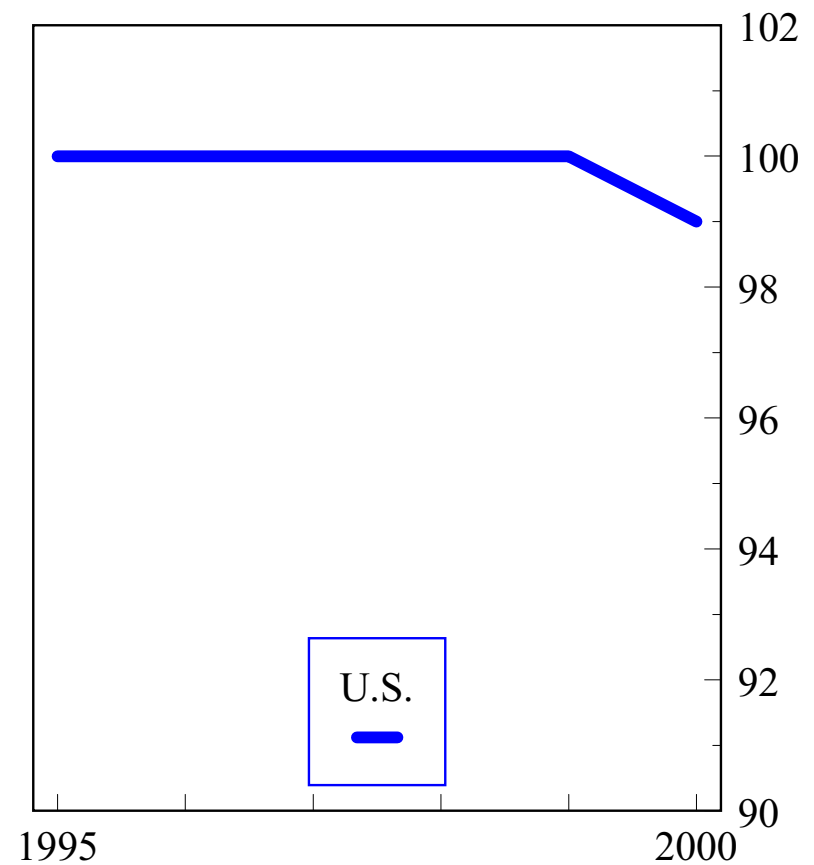


# U.S. Main Supplier of Broiler Cuts

**Mexico's Broiler Imports By Type**  
Thousand Tons

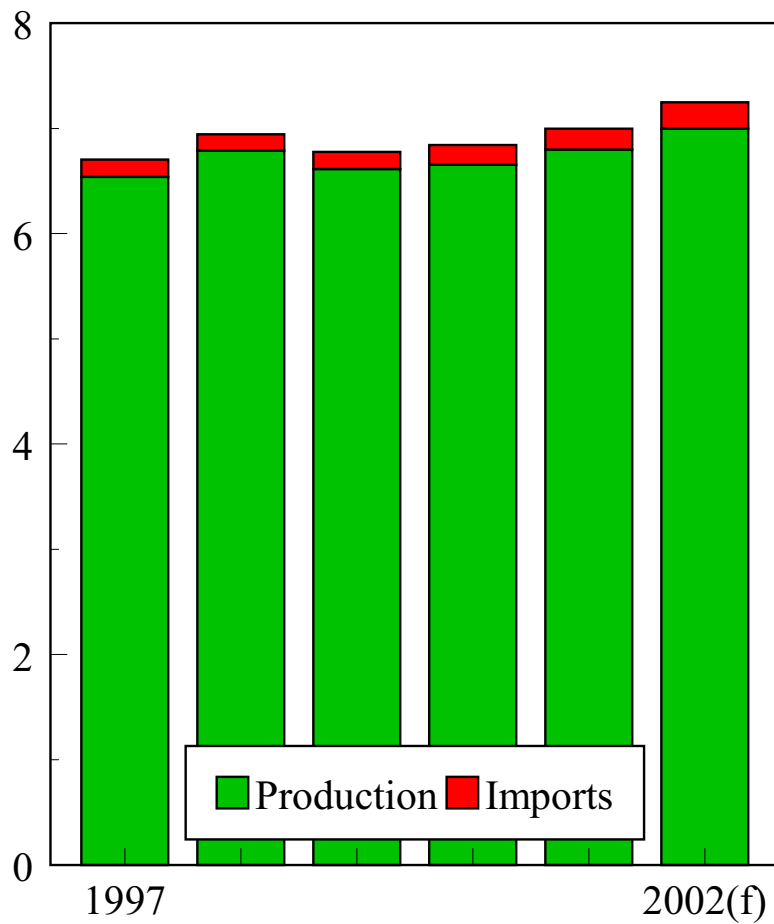


**Share of Mexico's Broiler Cuts Market**  
Percent

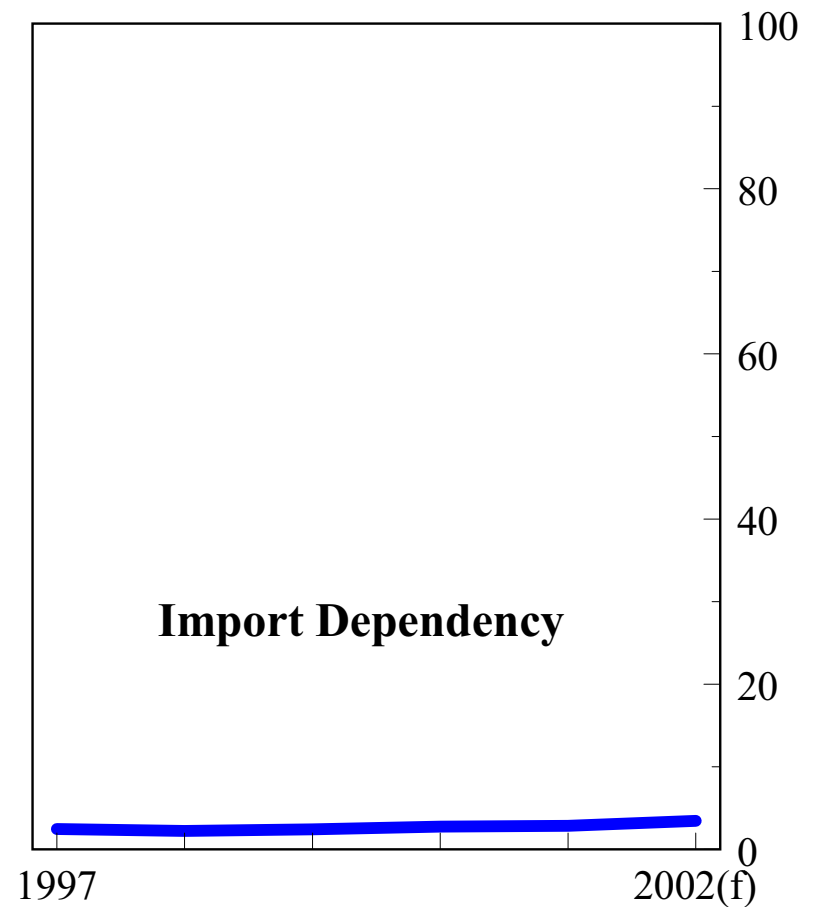


# # 6 European Union: Low Dependence on Imports

Million tons

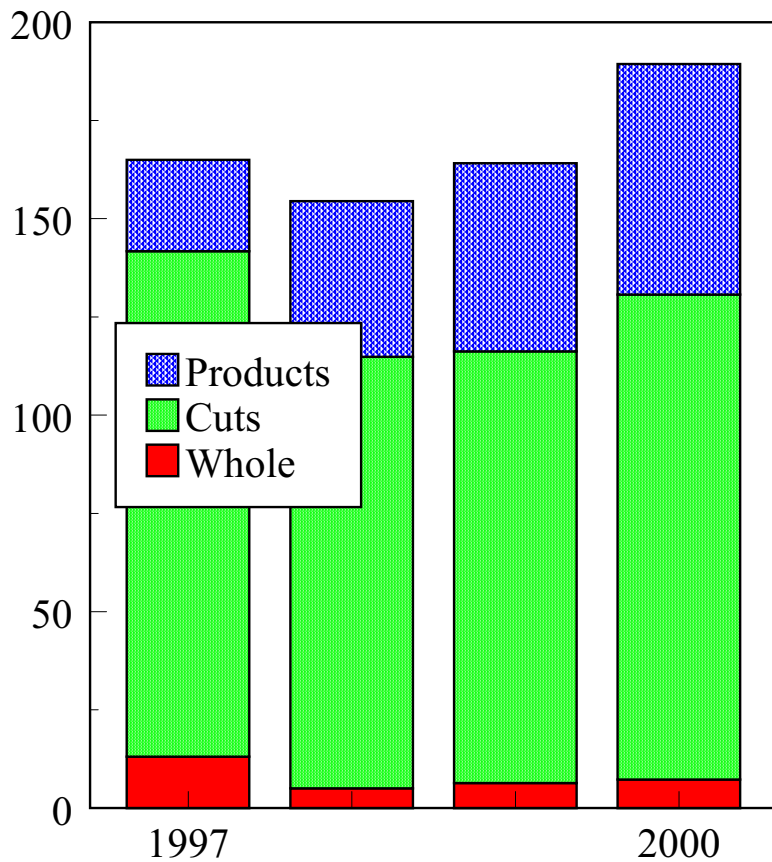


Percent



# Non-U.S. Suppliers Able to Access European Market

**European Union's Imports by Type**  
Thousand Tons



**Share of EU's Broiler Cuts Market**  
Percent

