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GAIN Report #IT0026

# Italy

# Livestock and Products

# Annual

# 2000

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**Report Highlights:** Breeding cattle, slaughter numbers, and meat production have all increased slightly in Italy, denoting a slight recovery from the BSE related decreases in production. Imports of beef from the United States fell to 105 tons in 1999, due mainly to the required 100% residue testing for imported beef. Swine and pork production have experienced slight increases in both stocks and slaughter, but low prices are expected to cause a small reduction in pig numbers next year. Imports from the United States fell slightly to 1,925 mt., but appear to be recovering in 2000.

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Includes PSD changes: Yes
Includes Trade Matrix: Yes
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Note: Livestock production is temporarily being covered by a different analyst therefore some PS&D numbers have been aggregated in a different manner resulting in slight changes from previously reported figures. All figures will be reviewed upon return of the regular analyst and a follow-up report submitted if necessary.

EXECUTIVE SUMMARY

**Cattle, Beef and Veal**

With regards to cattle and beef, Italy is slowly recovering from a period of reduced production resulting from consumer concerns over BSE. Italy experienced a small increase in cattle production in 1999, which is expected to remain stable in 2000. Despite the overall caution expressed by most producers, contacts in the producers' association believe that the demand for meat in Europe is steadily increasing as concerns over BSE abate. A looming concern, however, is that current high prices and profitability (which is in part secured by an EU slaughter subsidy) will cause an overshoot of production in a market that has not completely re-stabilized from previous demand shocks.

Trade in cattle and beef is characterized by considerable importation of live animals for fattening and slaughter, 75% of which comes from the EU, with much of the rest arriving from Eastern Europe, especially Poland. In 1999, Italy imported 408,000 tons, of which 90% were from other EU countries, mainly Germany and France. Imports of beef from the United States fell to 105 tons in 1999 from 133 tons in 1998, mainly a result of the required 100% residue testing for imports which has made the import process longer and more costly. Exports of beef increased slightly in 1999 to over 114,000 mt. (70% went to EU countries, with a significant portion going to Russia (17,000 mt.) under EU food aid programs) but are expected to decrease in 2000-2001 due to increases in domestic price and reduced stocks.

**Swine, Pork Meat**

Production has been influenced by low prices, residual consumer concern over BSE, and increases in exports, all contributing to a relatively strong demand for pork and pork products. Stocks increased slightly, as did pig slaughter. Total slaughter numbers are expected to increase to 1.3 million in 2000, but slaughter numbers in 2001 are expected to taper off to 1.26 million due in part to low prices and also due to the infection Circo virus type 2, which could reduce the number of pigs available for slaughter. In spite of a relatively strong demand for pork, slight herd reductions are expected as prices are not keeping up with production costs. Additionally, salami and processed pork are becoming increasingly important for export production.

Imports for pork and pork products declined slightly in 1999, corresponding to an increased domestic production. The majority of imports come from other EU countries, mainly Germany, the Netherlands, and France. Imports from the United States (mainly processed products, like canned hams) declined a bit in 1999, but appear to be recovering in 2000.

Exports increased from 87,000 tone to 113,000 tons, mainly due to competitive prices and increased demand for processed products (mainly fresh and frozen meat, but also aged Parma-type hams). Depending on EU food aid policies, producers are hoping for continued good export opportunities to Russia. In 1999, Italy exported over 10,000 mt to Russia, and in the 1st quarter of 2000 exported an additional 1,600 mt, a 25% increase over the same time period in 1999. Exports to the U.S. increased 15% to 1,680 mt, partly due to the increased sales of Parma hams, but also due to the removal of health restrictions on the import of mortadella (a bologna-type pork product).

CATTLE, BEEF AND VEAL

Production

Currently, the Italian beef sector is slowly recovering from the period of reduced production that resulted from consumer concerns over BSE. Breeding cattle numbers increased 1% in both 1999 and 2000, reflecting producers' belief that the market has finally stabilized. Following a slight increase in cattle production in 1999, the calf crop is expected to remain stable for 2000. Slaughter numbers and meat production have increased slightly since 1998 in line with increased animal numbers.

The Italian cattle sector is predominately made up of dairy cattle with beef cattle accounting for only about one-third of total activity. The increase in the milk quota under Agenda 2000 played a major part in resolving a long-term concern over the profitability of the dairy sector. Italian milk producers have consistently exceeded their milk quota and there has been a long battle between the GOI and the producers over who will pay the associated penalties. Even though it reduced threat of future penalties, the increase in quota will only cover Italian milk production at current levels and, therefore, should not stimulate further increases in herd size.

According to the Italian beef producers association, Italy will fatten 1.8 million cattle this year which will cover about half of the meat consumed in Italy (with the rest coming from direct imports, or from the slaughter of adult or cull animals). Due to a lack of pasture land, 50% of cattle production is concentrated in about 3,000 feed lots. The remaining production comes from small farms with an average of only 9 animals each. The European Union policy which limits slaughter subsidies to a maximum of 90 head per farm is reenforcing this production structure.

Despite the overall caution expressed by most producers, contacts in the producers' association believe that the overall demand for meat in Europe is slowly increasing as consumer concerns over BSE abate. In addition, the EU slaughter subsidies are helping secure the profitability of animal production in Italy. The association's concern is that this combination of profitability and increasing prices resulting from the higher demand will lead to a greater increase in animal production than can be sustained by the still shaky market. The end result, in their opinion, is that producers could face lower prices and further hard times in the near future.

Consumption

Per capita consumption of beef in Italy increased 2.5% to 22.9 kg in 1999 (still below 1995 levels of about 25 kilos per capita) mainly due to reduced consumer concern over BSE, but also in response to concerns over potential dioxin contamination in pork. However, consumption of fresh beef in the retail sector has fallen, especially in the small traditional butcher shops, which lost up to 13% of their sales in 1999. The larger supermarkets and hypermarkets also lost sales for fresh beef, but showed increases for semi-finished and processed products. The sale of frozen beef is reported to have increased 6%, most of which is for prepared products. Retail beef sales showed a 1% increase in the first quarter of 2000, suggesting that consumption may continue to improve through the current year.

Trade

Due to its limited calf production, Italy is a major importer of live animals for fattening and slaughter. As detailed in the previous report, in 1999 imports fell to about 1.6 million head from 1.9 million as the EU subsidy for 3 month old calves was phased out. However, the average size of animals has increased as farmers began to import slightly older animals for fattening. The prospects for 2000 and 2001 are that import numbers will remain stable. Of the animals imported, about 75% came from other EU countries with the remainder coming mainly from Eastern Europe, especially Poland. Italian exports of live animals are negligible.

The cost of complying with animal welfare regulations can be very expensive for Italian importers. Trucks carrying the calves for fattening are required to be air conditioned and to stop every 20 hours for food and water. One contact estimated that a shipment of animals from France costs well over 10 times that of animals from Poland (where shipment costs are estimated at less than $10,000). However, due to the stringent regulations in force due to BSE and other health related issues, most producers feel that the security of buying animals within the EU outweigh the lower cost of external sourcing.

In response to the weakened condition of the Italian beef sector over the last several years, imports of meat and meat products have increased total of 5-10%. In 1999, Italy imported 408,000 tons, of which 90% were from other EU countries, mainly Germany and France. Imports of beef from the United States fell to 105 tons in 1999 from 133 tons in 1998. The market for high quality beef remains stable in Italy and the decrease in U.S. imports is mainly a result of the required 100% residue testing for imports which has made the import process longer and more costly.

Exports of beef and beef products from Italy increased slightly in 1999 to over 114,000 mt. Over 70% of the exports went to other EU countries. A significant portion, 17,000 mt, were exported to Russia under EU food aid programs. A small amount of beef, transhipped from other countries approved by USDA, was exported to the United States mainly in the form of processed products such as canned beef and, more recently, bresaola, a dried salted beef typical of Italy. Exports for 2000 and 2001 are expected to be lower due to reduced stocks and an expected increase in domestic prices. Stocks have been reduced as a result of the increase in consumption and exports while production has remained constant.

Marketing

In Italy most beef is still sold in small traditional butcher shops, with less than 30% sold in supermarkets or through other large distribution channels. However, this trend is reversing as shoppers become more used to one-stop shopping at larger stores and as they begin to expect a wider variety of processed and semi-prepared products.

The beef sector is preparing to meet the new EU labeling law that will go into effect on the 1st of September. Most producer's feel that traceability is important but they are not convinced that the labeling law will significantly improve consumer faith in beef products. France was used as an example where a similar program has been in place but consumption hasn't increased. There is also concern that the traditional butcher shops will either have difficulty in complying or will not comply fully. As opposed to selling meat where the label can be affixed directly on the packages, these shops usually buy large cuts of meat from a variety of sources and then trim cuts as needed or on special order. Sales in this manner will require point-of-origin labels to be placed on signs or tags visible to the consumer. However, most customers have a long standing relationship with a particular butcher and will probably ignore the labels.

Also of some concern is the implementation of the law limiting the use of special risk material (SRMs) that will go into effect December 1. Italian producer's are concerned about how the consumer, who is still somewhat concerned about the safety of beef, will react to the higher prices that will come from implementing the regulation. There is also concern that meat processors across the border in Slovenia will benefit from an increased price advantage because of their lower labor costs.

Policy

Italy has been resistant to the idea of imports of U.S. hormone treated beef based on strong public memories of problems with hormone treated meat in the past. Government officials are eager for a solution to be reached, but preferences vary from compensation being paid to the United States to allowing in meat products with very strict labeling requirements. The $116 million in U.S. retaliation against the EU currently targets Italy fairly heavily, mainly on horticultural products.

## SWINE, PORK MEAT

### Production

Low prices, residual concerns over BSE, and increased exports continue to keep the demand for pork products relatively strong. As a result, swine stocks increased slightly in 1999 to 8.2 million and pork production increased to 1.47 mmt. Pig slaughter increased slightly (0.6%) in the first quarter of 2000 suggesting that production will remain stable at least in 2000 but should decline in 2001 if prices do not improve.

Total slaughter numbers are expected to increase to 1.3 million in 2000 but should fall to 1.26 million in 2001 in part due to the infection of Circo virus type 2, which could reduce the number of pigs ready for slaughter. Producers can also be expected to reduce herds due to low prices, which fell an average of 4% in the first quarter of 2000 compared to the same period in 1999. After a small recovery in late 1999, prices for a 156-176 kg pig were listed as 1,900 lire ($0.90/kg) which is less than the 2000-2100 lire/kg (($0.95 to $1.00) price needed to cover production costs. As a result, forecasts are for swine numbers to decrease at least 1% over the next year. Some contacts are hopeful that the lower numbers, and reported sanitary problems that will limit Asian exports, will stimulate prices in the second half of 2000

The production of salami and other processed pork products is becoming increasingly important to the pork sector, especially for exports. Salami production for the 2nd quarter of 2000 is forecast to increase 1.3%, mainly due to a 12% increase in exports to the EU, United States, and Japan.

### Consumption

Pork meat consumption has increased significantly in Italy during recent years as consumers looked for alternatives to beef. This trend has been supported by relatively low prices. Domestic consumption increased a further 2% in 1999 to 29 kg per capita and will continue to increase slowly in the coming years if prices remain competitive. Note: Pork consumption in the first quarter of 2000 increased 5% in relation to the same period in 1999. However, this increase was mainly due to a severe outbreak of avian flu that resulted in massive losses in the poultry sector. Consumption levels for the remainder of 2000 are expected to be closer to comparable levels in 1999.

Much of the reason behind the growth of pork consumption has been the increased availability of healthier types of pork products. In addition to sausages and processed products with lower fat, consumers are also buying more fresh pork cutlets. Reflecting this change, sales of meat in butcher shops have fallen 4%, but sales in supermarkets and other outlets, which can more easily provide the newer type of products, have increased 9% in volume and 13% in value.

The pork industry is concerned about future consumption trends as beef begins to regain some of its market share and as consumers look for products conceived to be more healthy. In addition, the immigrant sector, which is growing increasingly important as the population of native Italians remains relatively constant, is made up of many groups who do not eat pork for religious reasons.

Trade

Imports of pork and pork products in 1999 fell slightly, in line with the increase in domestic production. Almost all of the imports came from the EU, mainly the Netherlands, Germany and France. Imports from the United States, used for processed products such as canned hams, fell slightly to 1,925 mt, but appear to be recovering in 2000.

Exports increased from 87,000 tons to 113,000 tons in 1999, mainly due to competitive prices and increased demand for processed products. Most of the increase was for fresh and frozen meat, up 29% from 1998, but also aged Parma type hams recorded increases of over 10%. Exports to the U.S. increased 15% to 1,680 mt partly due to increased sales of Parma hams, but also due to the removal of health restrictions on cooked pork products which have allowed the import of mortadella, a bologna-like pork product. Depending on EU food aid policies, producers are hoping for continued good export opportunities to Russia. In 1999, Italy exported over 10,000 mt to Russia, and in the 1st quarter of 2000 exported an additional 1,600 mt, a 25% increase over the same time period in 1999.

Marketing

ASSICA, the main pork processors' association, is increasing its efforts to expand markets in the United States, Canada, and Japan by using print campaigns and participating in trade shows. These three regions are considered to have the best market potential for traditional Italian pork products, especially Denomination of Origin Protected (DOP) products such as Parma hams.

Two of the major pork producing regions, Emilia-Romagna and Lombardia, signed a protocol last spring with the Minister of Agriculture to designate a production territory for the production of Italian pork to be used in the processing industry. This protocol is designed to facilitate the production of DOP products and will provide a system of traceability and certification of quality to help increase consumer interest and faith in the Italian food chain. (In 1999, there were 7.7 million hogs used to make almost 11.5 million DOP hams.) Local agriculture unions have supported this initiative and have begun campaigns to urge consumers who are concerned with the safety of meat products following the BSE and dioxin scandals to purchase DOP products. The DOP seal guarantees that the products were raised and processed in Italy which, to date, has not had any significant food safety problems. The Minister of Agriculture is heavily promoting the DOP program as a way to support ag sector income by building on Italy's reputation for high quality traditional products.

PSD TABLES

Meat, Beef and Veal

| PSD Table | | | | | | |
|---|---|---|---|---|---|---|
| Country | Italy | | | | | |
| Commodity | Meat, Beef and Veal | | | | (1000 MT CWE)(1000 HEAD) | |
| | Revised | 1999 | Preliminary | 2000 | Forecast | 2001 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/1999 | | 01/2000 | | 01/2001 |
| Slaughter (Reference) | 4480 | 4491 | 4500 | 4500 | 0 | 4500 |
| Beginning Stocks | 142 | 142 | 102 | 40 | 62 | 10 |
| Production | 1150 | 1164 | 1160 | 1170 | 0 | 1170 |
| Intra EC Imports | 380 | 368 | 390 | 378 | 0 | 382 |
| Other Imports | 40 | 40 | 40 | 42 | 0 | 43 |
| TOTAL Imports | 420 | 408 | 430 | 420 | 0 | 425 |
| TOTAL SUPPLY | 1712 | 1714 | 1692 | 1630 | 62 | 1605 |
| Intra EC Exports | 75 | 74 | 85 | 39 | 0 | 39 |
| Other Exports | 45 | 41 | 55 | 21 | 0 | 21 |
| TOTAL Exports | 120 | 115 | 140 | 60 | 0 | 60 |
| Human Dom. Consumption | 1450 | 1519 | 1450 | 1520 | 0 | 1505 |
| Other Use, Losses | 40 | 40 | 40 | 40 | 0 | 40 |
| TOTAL Dom. Consumption | 1490 | 1559 | 1490 | 1560 | 0 | 1545 |
| Ending Stocks | 102 | 40 | 62 | 10 | 0 | 0 |
| TOTAL DISTRIBUTION | 1712 | 1714 | 1692 | 1630 | 0 | 1605 |
| Calendar Yr. Imp. from U.S. | 150 | 105 | 160 | 0 | 0 | 0 |
| Calendar Yr. Exp. to U.S. | 60 | 51 | 60 | 0 | 0 | 0 |

Animal Numbers, Cattle

| PSD Table | | | | | | |
|---|---|---|---|---|---|---|
| Country | Italy | | | | | |
| Commodity | Animal Numbers, Cattle | | | | (1000 HEAD) | |
| | Revised | 1999 | Preliminary | 2000 | Forecast | 2001 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/1999 | | 01/2000 | | 01/2001 |
| Total Cattle Beg. Stks | 7320 | 0 | 7260 | 7150 | 7200 | 7140 |
| Dairy Cows Beg. Stocks | 2080 | 2116 | 2050 | 2100 | 0 | 2090 |
| Beef Cows Beg. Stocks | 1995 | 684 | 1995 | 690 | 0 | 690 |
| Production (Calf Crop) | 2960 | 3131 | 2980 | 3130 | 0 | 3135 |
| Intra EC Imports | 1300 | 1243 | 1300 | 1240 | 0 | 1240 |
| Other Imports | 400 | 356 | 400 | 330 | 0 | 330 |
| TOTAL Imports | 1700 | 1599 | 1700 | 1570 | 0 | 1570 |
| TOTAL SUPPLY | 11980 | 4730 | 11940 | 11850 | 7200 | 11845 |
| Intra EC Exports | 135 | 108 | 135 | 99 | 0 | 95 |
| Other Exports | 5 | 10 | 5 | 11 | 0 | 10 |
| TOTAL Exports | 140 | 118 | 140 | 110 | 0 | 105 |
| Cow Slaughter | 560 | 717 | 560 | 730 | 0 | 735 |
| Calf Slaughter | 1120 | 1078 | 1120 | 1070 | 0 | 1060 |
| Other Slaughter | 2800 | 2696 | 2820 | 2700 | 0 | 2705 |
| Total Slaughter | 4480 | 4491 | 4500 | 4500 | 0 | 4500 |
| Loss | 100 | 100 | 100 | 100 | 0 | 100 |
| Ending Inventories | 7260 | 7150 | 7200 | 7140 | 0 | 7140 |
| TOTAL DISTRIBUTION | 11980 | 11859 | 11940 | 11850 | 0 | 11845 |
| Calendar Yr. Imp. from U.S. | 0 | 0 | 0 | 0 | 0 | 0 |
| Calendar Yr. Exp. to U.S. | 0 | 0 | 0 | 0 | 0 | 0 |

Animal Numbers, Swine

| PSD Table | | | | | | |
|---|---|---|---|---|---|---|
| Country | Italy | | | | | |
| Commodity | Animal Numbers, Swine | | | | (1000 HEAD) | |
| | Revised | 1999 | Preliminary | 2000 | Forecast | 2001 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/1999 | | 01/2000 | | 01/2001 |
| TOTAL Beginning Stocks | 8225 | 8225 | 8145 | 8380 | 8200 | 8360 |
| Sow Beginning Stocks | 697 | 558 | 697 | 560 | 0 | 560 |
| Production (Pig Crop) | 13270 | 13441 | 13405 | 13430 | 0 | 13015 |
| Intra EC Imports | 1200 | 1033 | 1200 | 1019 | 0 | 1019 |
| Other Imports | 0 | 3 | 0 | 1 | 0 | 1 |
| TOTAL Imports | 1200 | 1036 | 1200 | 1020 | 0 | 1020 |
| TOTAL SUPPLY | 22695 | 22702 | 22750 | 22830 | 8200 | 22395 |
| Intra EC Exports | 0 | 28 | 0 | 20 | 0 | 15 |
| Other Exports | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL Exports | 0 | 28 | 0 | 20 | 0 | 15 |
| Sow Slaughter | 0 | 0 | 0 | 0 | 0 | 0 |
| OTHER SLAUGHTER | 13050 | 12992 | 13050 | 13050 | 0 | 12660 |
| Total Slaughter | 13050 | 12992 | 13050 | 13050 | 0 | 12660 |
| Loss | 1500 | 1400 | 1500 | 1400 | 0 | 1400 |
| Ending Inventories | 8145 | 8380 | 8200 | 8360 | 0 | 8320 |
| TOTAL DISTRIBUTION | 22695 | 22800 | 22750 | 22830 | 0 | 22395 |
| Calendar Yr. Imp. from U.S. | 0 | 0 | 0 | 0 | 0 | 0 |
| Calendar Yr. Exp. to U.S. | 0 | 0 | 0 | 0 | 0 | 0 |

Meat, Swine

| PSD Table | | | | | | |
|---|---|---|---|---|---|---|
| Country | Italy | | | | | |
| Commodity | Meat, Swine | | | | (1000 MT CWE)(1000 HEAD) | |
| | Revised | 1999 | Preliminary | 2000 | Forecast | 2001 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/1999 | | 01/2000 | | 01/2001 |
| Slaughter (Reference) | 13050 | 12992 | 1500 | 13060 | 0 | 12660 |
| Beginning Stocks | 314 | 314 | 334 | 300 | 334 | 265 |
| Production | 1470 | 1471 | 1470 | 1475 | 0 | 1420 |
| Intra EC Imports | 710 | 715 | 700 | 700 | 0 | 720 |
| Other Imports | 10 | 11 | 10 | 15 | 0 | 20 |
| TOTAL Imports | 720 | 726 | 710 | 715 | 0 | 740 |
| TOTAL SUPPLY | 2504 | 2511 | 2514 | 2490 | 334 | 2425 |
| Intra EC Exports | 82 | 82 | 85 | 75 | 0 | 77 |
| Other Exports | 28 | 31 | 35 | 40 | 0 | 43 |
| TOTAL Exports | 110 | 113 | 120 | 115 | 0 | 120 |
| Human Dom. Consumption | 2040 | 2078 | 2040 | 2090 | 0 | 2080 |
| Other Use, Losses | 20 | 20 | 20 | 20 | 0 | 20 |
| TOTAL Dom. Consumption | 2060 | 2098 | 2060 | 2110 | 0 | 2100 |
| Ending Stocks | 334 | 300 | 334 | 265 | 0 | 205 |
| TOTAL DISTRIBUTION | 2504 | 2511 | 2514 | 2490 | 0 | 2425 |
| Calendar Yr. Imp. from U.S. | 1 | 2 | 1 | 2 | 0 | 2 |
| Calendar Yr. Exp. to U.S. | 2 | 2 | 2 | 2 | 0 | 2 |

FEED DEMAND

STRATEGIC INDICATOR TABLES FOR ITALY

| | | | | |
|---|---|---|---|---|
| FEED DEMAND | | | | |
| STRATEGIC INDICATOR TABLES FOR [COUNTRY] | | | | |
| | | | | |
| | | | | |
| MEAT PRODUCTION (1,000 MT) | | | | |
| | | Last Year | Current Year | Out Year Forecast |
| Calendar Year: | 1998 | 1999 | 2000 | 2001 |
| Poultry | | | | |
| Poultry Meat: | | | | |
| Eggs: | | | | |
| Pork: | 1,412 | 1,471 | 1,475 | 1420 |
| | | | | |
| | | | | |
| | | | | |
| COMPOUND FEED SECTOR (1,000 MT) | | | | |
| | | Last Year | Current Year | Out Year Forecast |
| Calendar Year: | 1998 | 1999 | 2000 | 2001 |
| Compound Feed Capacity | 22,000 | 22,000 | 22,000 | 22,000 |
| Total Compound Feed Produced | 11,230 | 11,250 | 11,100 | 11,200 |
| ------ by integrated producers | na | na | na | na |
| ------ by commercial producers | na | na | na | na |
| FEED GRAIN USE (1,000 MT) | | | | |
| | | Last Year | Current Year | Out Year Forecast |
| Marketing Year: | 1998 | 1999 | 2000 | 2001 |
| Corn (Domestic consumption: feed) | 9,000 | 9,150 | 9,500 | 9,400 |
| Other (barley) | 1,600 | 1,500 | 1,500 | 1,500 |
| | 310 | 335 | 300 | 300 |
| | | | | |
| | | | | |
| PROTEIN - ENERGY USAGE (1,000 MT) | | | | |
| | | Last Year | Current Year | Out Year Forecast |

| | | | | |
|---|---|---|---|---|
| Marketing Year: | 1998 | 1999 | 2000 | 2001 |
| Total Protein Meal (feed waste domestic consumption) | 4,127 | 3,891 | 4,087 | 4,060 |
| Soy Bean Meal (feed waste domestic consumption) | 3,445 | 3,225 | 3,410 | 3,400 |
| Sunflowerseed Meal (feed waste domestic consumption) | 545 | 528 | 539 | 520 |
| Fish Meal | 70 | 70 | 71 | 71 |
| Palm Crude Oil (feed waste domestic consumption) | 0 | 0 | 0 | 0 |
| | | | | |
| | | | | |
| TRADE (Metric Tonnes) | | | | |
| | | Last Year | Current Year | Out Year Forecast |
| Calendar Year: | 1998 | 1999 | 2000 | 2001 |
| Corn | 581,362 | 1,200,790 | 800,000 | 800,000 |
| Imports: | 146,432 | 47,466 | 60,000 | 70,000 |
| Exports: | | | | |
| Soy Beans | 832,832 | 781,656 | 900,000 | 900,000 |
| Imports: | 8,586 | 3,547 | 3,000 | 3,000 |
| Exports: | | | | |
| Soy Bean Meal | 2,020,958 | 2,169,330 | 2,000,000 | 2,200,000 |
| Imports: | 35,352 | 75,110 | 50,000 | 50,000 |
| Exports: | | | | |
| Fish Meal | 66,036 | 68,138 | 68,000 | 68,000 |
| Imports: | 11,120 | 4,751 | 5,000 | 5,000 |
| Exports: | | | | |
| Palm Crude Oil | 198,483 | 207,770 | 200,000 | 200,000 |
| Imports: | 14,213 | 15,515 | 15,000 | 15,000 |
| Exports: | | | | |
| PROTEIN PRODUCTS TARIFFS AND TAXES (EU tariffs) | | Bound Rate | Applied Rate | Other |
| | Product | (%) | (%) | Import |
| Report Year: | Description 1/ | | | Taxes/Fees |
| 0505.90 | FEATHER MEAL | 0 | 0 | |

| | | | | |
|---|---|---|---|---|
| 1501.00.00.60 | YELLOW GREASE | 0 | 0 | |
| 1502.00.00.40 | INEDIBLE TALLOW | 0 | 0 | |
| 1511 | PALM OIL | 0 | 0 | |
| 1518 | ANML/VG FTS &OILS | | (9) | |
| 2301.10 | MEAT AND BONE MEAL | | (6) | |
| 2301.20 | FISH MEAL | 0 | 0 | |
| | | 0 | 0 | |

TRADE TABLES

Animal Numbers, Cattle

Export

| Export Trade Matrix | | | | |
|---|---|---|---|---|
| Country | Italy | | Units: | 1000 Heads |
| Commodity | Animal Numbers, Cattle | | Partial Begin | Jan |
| | | | Partial End | Apr |
| Exports for: | 1998 | 1999 | 1999 | 2000 |
| | Full | Full | Partial | Partial |
| U.S. | | | | |
| Others | | | | |
| France | 59 | 60 | 17 | 5 |
| Spain | 49 | 42 | 18 | 9 |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total for Others | 108 | 102 | 35 | 14 |
| Others not Listed | 21 | 16 | 1 | 5 |
| Grand Total | 129 | 118 | 36 | 19 |

Import

| Import Trade Matrix | | | | |
|---|---|---|---|---|
| Country | Italy | | Units: | 1000 Heads |
| Commodity | Animal Numbers, Cattle | | Partial Begin | Jan |
| | | | Partial End | Apr |
| Imports for: | 1998 | 1999 | 1999 | 2000 |
| | Full | Full | Partial | Partial |
| U.S. | | | | |
| Others | | | | |
| France | 1301 | 932 | 311 | 282 |
| Poland | 300 | 290 | 98 | 87 |
| Germany | 90 | 85 | 26 | 18 |
| Austria | 77 | 69 | 21 | 18 |
| Spain | 43 | 60 | 14 | 17 |
| Ireland | 25 | 57 | 9 | 14 |
| Bel-Lux | 25 | 31 | 8 | 10 |
| Romania | 17 | 29 | 9 | 14 |
| Hungary | 21 | 17 | 5 | 11 |
| | | | | |
| Total for Others | 1899 | 1570 | 501 | 471 |
| Others not Listed | 27 | 28 | 9 | 8 |
| Grand Total | 1926 | 1598 | 510 | 479 |

Animal Numbers, Swine

Export

| Export Trade Matrix | | | | |
|---|---|---|---|---|
| Country | Italy | | Units: | 1000 Heads |
| Commodity | Animal Numbers, Swine | | Partial Begin | Jan |
| | | | Partial End | Apr |
| Exports for: | 1998 | 1999 | 1999 | 2000 |
| | Full | Full | Partial | Partial |
| U.S. | | | | |
| Others | | | | |
| Germany | 15 | 25 | 9 | 4 |
| Spain | 6 | 1 | 0 | 0 |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total for Others | 21 | 26 | 9 | 4 |
| Others not Listed | 1 | 1 | 2 | 0 |
| Grand Total | 22 | 27 | 11 | 4 |

Import

| | | | | |
|---|---|---|---|---|
| Import Trade Matrix | | | | |
| Country | Italy | | Units: | 1000 Heads |
| Commodity | Animal Numbers, Swine | | Partial Begin | Jan |
| | | | Partial End | Apr |
| Imports for: | 1998 | 1999 | 1999 | 2000 |
| | Full | Full | Partial | Partial |
| U.S. | | | | |
| Others | | | | |
| Netherlands | 360 | 547 | 233 | 202 |
| Bel-Lux | 267 | 222 | 77 | 72 |
| Spain | 76 | 95 | 39 | 54 |
| Germany | 109 | 88 | 40 | 27 |
| France | 104 | 67 | 26 | 21 |
| Austria | 9 | 5 | 1 | 1 |
| Hungary | 0 | 3 | 0 | 1 |
| | | | | |
| | | | | |
| | | | | |
| Total for Others | 925 | 1027 | 416 | 378 |
| Others not Listed | 46 | 9 | 3 | 1 |
| Grand Total | 971 | 1036 | 419 | 379 |

Meat, Beef and Veal

Export

| Export Trade Matrix | | | | |
|---|---|---|---|---|
| Country | Italy | | Units: | MT |
| Commodity | Meat, Beef and Veal | | Partial Begin | Jan |
| | | | Partial End | Apr |
| Exports for: | 1998 | 1999 | 1999 | 2000 |
| | Full | Full | Partial | Partial |
| U.S. | 56 | 51 | 20 | 32 |
| Others | | | | |
| France | 30247 | 36406 | 12181 | 10833 |
| Netherlands | 8577 | 10469 | 3611 | 3612 |
| Germany | 7245 | 6629 | 1701 | 2013 |
| Denmark | 3928 | 5444 | 1981 | 1267 |
| Russia | 14997 | 17732 | 5984 | 1879 |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total for Others | 64994 | 76680 | 25458 | 19604 |
| Others not Listed | 41771 | 37855 | 10819 | 15637 |
| Grand Total | 106821 | 114586 | 36297 | 35273 |

Import

| Import Trade Matrix | | | | |
|---|---|---|---|---|
| Country | Italy | | Units: | MT |
| Commodity | Meat, Beef and Veal | | Partial Begin | Jan |
| | | | Partial End | Apr |
| Imports for: | 1998 | 1999 | 1999 | 2000 |
| | Full | Full | Partial | Partial |
| U.S. | 133 | 105 | 0 | 0 |
| Others | | | | |
| Germany | 84550 | 83879 | 26788 | 30473 |
| France | 89886 | 82692 | 25390 | 31170 |
| Netherlands | 79402 | 79197 | 25056 | 24215 |
| Ireland | 20617 | 31159 | 9525 | 6247 |
| Austria | 23482 | 29049 | 8321 | 10388 |
| Spain | 28977 | 25834 | 7914 | 7494 |
| Denmark | 25906 | 24114 | 8156 | 7135 |
| Brasil | 15115 | 20391 | 5185 | 6676 |
| Argentina | 7172 | 5555 | 2606 | 1443 |
| | | | | |
| Total for Others | 375107 | 381870 | 118941 | 125241 |
| Others not Listed | 24852 | 25775 | 8392 | 9042 |
| Grand Total | 400092 | 407750 | 127333 | 134283 |

Meat, Swine

Export

| | | | | |
|---|---|---|---|---|
| Export Trade Matrix | | | | |
| Country | Italy | | Units: | MT |
| Commodity | Meat, Swine | | Partial Begin | Jan |
| | | | Partial End | Apr |
| Exports for: | 1998 | 1999 | 1999 | 2000 |
| | Full | Full | Partial | Partial |
| U.S. | 1422 | 1680 | 511 | 548 |
| Others | | | | |
| Germany | 25293 | 27703 | 8045 | 8301 |
| France | 16084 | 18256 | 4938 | 4814 |
| Austria | 8218 | 13172 | 3108 | 4434 |
| Russia | 200 | 10153 | 1210 | 1576 |
| Spain | 8035 | 7874 | 2762 | 3558 |
| Albania | 1606 | 5187 | 1390 | 1486 |
| Bel-Lux | 4476 | 4467 | 1074 | 1156 |
| United Kingdom | 3354 | 3685 | 1098 | 1186 |
| | | | | |
| | | | | |
| Total for Others | 67266 | 90497 | 23625 | 26511 |
| Others not Listed | 18656 | 20840 | 5438 | 7139 |
| Grand Total | 87344 | 113017 | 29574 | 34198 |

Import

| | | | | |
|---|---|---|---|---|
| Import Trade Matrix | | | | |
| Country | Italy | | Units: | MT |
| Commodity | Meat, Swine | | Partial Begin | Jan |
| | | | Partial End | Apr |
| Imports for: | 1998 | 1999 | 1999 | 2000 |
| | Full | Full | Partial | Partial |
| U.S. | 2016 | 1925 | 384 | 444 |
| Others | | | | |
| Netherlands | 235156 | 219242 | 72361 | 69275 |
| Germany | 120726 | 129707 | 41275 | 40863 |
| France | 146618 | 126047 | 43028 | 44777 |
| Denmark | 110325 | 101815 | 35561 | 33093 |
| Bel-Lux | 80490 | 55272 | 23824 | 16923 |
| Austria | 29774 | 34077 | 10352 | 11837 |
| Spain | 28739 | 28366 | 9290 | 11118 |
| United Kigdom | 17270 | 12450 | 4910 | 4082 |
| Hungary | 10012 | 8013 | 2394 | 4080 |
| | | | | |
| Total for Others | 779110 | 714989 | 242995 | 236048 |
| Others not Listed | 12887 | 8699 | 4218 | 2467 |
| Grand Total | 794013 | 725613 | 247597 | 238959 |