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Livestock and Products

2004 Another Difficult Year For Russian Livestock Industry

2005

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Report Highlights:

The Russian livestock industry experienced a decline in beef production and slow growth in the pork sector as producers slaughtered at lower than normal weights to take advantage of rising meat prices and to offset continued high feed prices. While the pork sector is forecast to resume faster expansion in 2005, the beef industry will continue its decade-long implosion. The rising prices in 2004 resulted from increasing demand unfulfilled by imports due to tariff and non-tariff barriers and slowing Russian production.

Includes PSD Changes: No
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Executive Summary

Russian livestock producers faced more difficult conditions than expected in 2004, as input costs remained high and rising meat prices enticed producers to slaughter at lower than normal weights. As a result, beef production declined and the pork sector grew slower than previously forecast. Despite the decline in the swine herd in 2004, the sector is forecast to expand faster in 2005 as the pig crop rebounds. The beef industry will continue its decade-long implosion, as investments prove more attractive in other agricultural sectors. In 2004, rising prices resulted from increasing demand unfulfilled by Russian production, tariff and non-tariff barriers to imports, increasing input prices, and high prices in key exporting countries.

Production

The Russian swine herd is forecast to increase by four percent in 2005. Ending stocks in both 2004 and 2005 were revised down from the previous report due to lower than expected pig crops. High feed costs and pork prices encouraged early slaughter in 2004 at lower than normal weights. The downward revision in the swine herd is reflected in reductions in the 2004 and 2005 production forecasts. Nevertheless, Russian pork production in 2005 is forecast to increase by two percent due to a larger pig crop and a return to normal slaughter weights.

Cattle ending stocks are forecast to decrease by almost six percent in 2004 due to higher than expected slaughter rates. In 2005, the cattle herd is forecast to decrease another five percent. Correspondingly, beef production is forecast to decrease by three and five percent in 2004 and 2005.

Feed supplies

Total feed supplies were lower in 2004 in comparison with 2003, but decreasing cattle numbers kept this situation from becoming a crisis for the swine and poultry sectors.

Table 1. Feed at Agricultural Organizations, as of December 1

	2004	2003	2002
Feed, mln tons	22.8	24.0	26.5
Including feed grain	6.7	6.9	9.4
Per animal, tons of feed	1.37	1.34	1.37

Source: Federal State Statistics Service

Trade

Russian pork imports are forecast to increase by five percent in 2005. The forecast for Russian imports in 2004 was revised down by five percent because of several factors: foot and mouth disease in Brazil, rising pork prices in Europe, changing EU agricultural market structure due to expansion, and the appreciating euro.

Russian beef imports are forecast to rise by six percent in 2005 due to the decrease in Russian production and continuing strong consumer demand. In 2004, Ukrainian domestic production and supply problems led to a shift toward Brazilian and Argentine imports. Due to the preferential trading agreement that keeps Ukraine outside of the TRQ, it will regain its spot as the largest exporter to Russia in 2005 if beef supplies are sufficient.

The TRQs are also causing the amount of processed pork and beef imported by Russia to rise. Processed meat products (tariff code 16) are not covered by the TRQs and its tariff has remained unchanged. Thus, the TRQ licensing difficulties and high over-quota tariff have made imports of processed pork and beef more attractive relative to raw meat than in the past. The second change induced by the TRQ is an increase in the amount of boneless meat being imported. While this trend is strong for both meats, Russian beef imports have shown the most significant change as imports went from mostly bone-in beef to almost 90 percent boneless beef in 2004. The shift toward boneless meat has happened because Russian importers want to use their limited TRQ licenses on higher value and more profitable cuts. (Note: When calculating Russia's imports (carcass weight equivalent) for 2004, the increase in boneless beef and pork compensated for the decrease in total product weight reported in the Russian import statistics.)

Though 2004 data is incomplete, it is clear that the pork and beef TRQs will not fill completely due to the problems administering the TRQs in the first quarter of 2004 and other issues. Please see GAIN Report RS4068 for the full details of the obstacles that prevented complete quota fill in 2004.

Two Food Ingredients Banned

The Russian Federal Service for Health and Protection of Consumer Rights (RosPotrebNadzor) recently banned the importation of food products into the Russian Federation that have been processed or manufactured using the preservatives E216 (propyl p-hydroxybenzoate (propyl paraban)) and E217 (sodium propyl p-hydroxybenzoate). Please see GAIN Report RS5004 for more details.

Ministry of Agriculture Plans for the Future

The Ministry of Agriculture has developed a strategy to reduce the market share of imported meat in Russia to 20 percent by 2010. The strategy also predicts that Russian production of animal products will increase by 80-90 percent in the next 15 years. The strategy document outlines that the main instruments for achieving the goal of "forced development of livestock farming" as "restrictions on imports of meat and customs tariff and non-tariff regulation in order to ensure the predictability of the TRQ mechanism for the next 5-7 years." The ministry expects household and government spending on meat and dairy products to continue growing and that per capita meat consumption could increase by 100 percent over a 15-year period. The ministry urges greater state support for livestock farmers and breeders, including through leasing domestic and foreign breeding stock. The strategy calls for subsidized investment capital for modernizing infrastructure and production equipment and the construction of new enterprises. It also notes the importance of streamlining and centralizing procurements of animal products for state needs and ensuring veterinary and sanitary control over meat quality. According to the Agrarian Marketing Institute, imported meat had a 30 percent share of the Russian market in 2003, including 51.5 percent of the poultry market, 21.6 percent of pork, and 18.8 percent of beef. In the first nine months of 2004, the total import share was 26 percent, including 43 percent for poultry, 15 percent for pork, and 21 percent for beef.

The Ministry's strategy is an interesting indicator of the changing attitude in Russia regarding the need for greater government intervention in the agricultural sector. In contrast to the grain sector, in recent years the livestock sector has increased lobbying for more government subsidies and protectionism. Though the implementation of the plan seems unlikely due to the Russian Government's budget constraints, it is more sophisticated than previous versions because it argues for subsidies through mechanisms already in use

for other programs (such as subsidized credit for farm machinery) rather than proposing the creation of new ways of distributing subsidies solely to livestock producers.

Table 2: Russian Wholesale Prices (Offer Prices), Half Carcasses, January 2003 – November 2004.

Date	Exchange rate, ruble/\$	Domestic beef	Imported beef	Domestic pork	Imported pork
01/30/2003	31.80	50.17	48.40	48.75	45.50
02/28/2003	31.57	51.17	49.95	44.75	46.14
03/30/2003	31.38	48.67	48.01	40.37	44.90
04/30/2003	31.10	48.00	46.35	40.25	44.62
05/30/2003	30.66	48.00	48.52	41.02	48.45
06/30/2003	30.34	47.00	49.45	42.51	49.00
07/30/2003	30.24	49.00	49.30	42.39	49.11
08/30/2003	30.50	49.00	49.57	43.50	51.83
09/30/2003	30.61	58.00	52.75	51.33	61.60
10/30/2003	29.82	51.17	54.81	52.00	60.93
11/30/2003	29.74	52.38	52.31	50.75	55.53
12/30/2003	29.25	51.00	54.96	52.50	53.89
01/30/2004	28.48	64.42	63.61	54.63	54.81
02/29/2004	28.52	65.50	64.68	59.50	52.67
03/30/2004	28.49	66.00	67.05	55.17	55.05
04/30/2004	28.88	62.50	68.00	58.00	60.69
05/30/2004	28.99	68.50	67.64	64.25	67.75
06/30/2004	29.03	64.50	65.99	64.33	76.05
07/30/2004	29.09	68.75	64.02	68.68	74.37
08/30/2004	29.23	66.50	65.19	n/a	76.52
09/30/2004	29.22	66.75	70.50	87.50	86.86
10/30/2004	28.77	71.00	72.50	91.00	92.13
11/30/2004	28.24	69.50	71.75	86.50	84.66
12/29/2004	27.78	72.00	81.17	83.50	84.12

Source: Russian Institute for Agricultural Market Studies (IKAR)
Prices are in rubles per kilogram.

Policy

On January 11, the Russian Government published the resolutions that renew the poultry quota and beef and pork tariff rate quotas (TRQs) for 2005. On February 3, Russia released the final documents that allow the 2005 import licenses to be distributed to Russian importers and trade to begin. Please see GAIN report RS5002 for a full translation of the resolutions.

The frozen beef and chilled beef TRQs were set at 430,000 MT and 27,500 MT, with the United States to receive a specific part of the frozen beef TRQ (17,700 MT). The frozen beef TRQ was raised by 10,000 MT in 2005 and the U.S. share was increased by 500 MT. The fresh/chilled beef TRQ remains the same. However, since the detection of one case of BSE in December 2003, the United States has been unable to export beef or bovine products for human consumption to Russia.

The United States was allocated 53,800 MT of the 467,400 MT pork TRQ. The pork TRQ was increase from 450,000 MT in 2004 and the U.S. share of the pork TRQ was raised by 11,600

MT. An unexpected compromise between Russian meat processors and meat producers was included in point 4 (f) of the pork TRQ resolution. It requires the creation of an additional proposal for pork trimmings in June 2005 to come into force in July 2005. Though the nature of this proposal is not clearly outlined, its mention shows that Russian processors complaints about problems keeping the low-priced pork trimmings inside the TRQ have been taken into consideration. The final proposal might be a secondary TRQ for trimmings with a lower in-quota duty, a removal of trimmings from the TRQ, or a method for allowing processors to import trimmings using special licenses.

Separating trimmings from the TRQ could be an important temporary market for U.S. exporters. Currently, exporters are allowed to ship cutting fat outside of the TRQ, but Russian processors would also like to import trimmings. Trimmings are an important ingredient for sausage production, but its current inclusion in the TRQ makes it relatively expensive for processors.

Russian trade policy in general had a significant impact on the poultry and meat markets during 2004. For complete details, reference GAIN report RS4068.

Table 3: Russian Meat Import Quota Volumes for 2005, MT

	Pork	Beef	
		Frozen	Fresh
Total	467,400	430,000	27,500
Including			
EU	236,000	339,700	27,000
US	53,800	17,700	0
Paraguay	1,000	3	0
Other	176,600	69,600	500

Source: GOR Resolutions

Marketing

Russia's sophisticated and competitive retail sector is booming thanks to six straight years of strong economic expansion. According to official sources, total retail turnover in 2003 was \$146 billion (including \$68 billion for food retail turnover), although unofficial estimates place total sales at least 50 percent above this level. It is clear that the expanding market has caught the attention of retailers – both local and foreign chains. Experts forecast growth will peak by 2012, so for U.S. exporters of food products for retail sale, the clock is ticking down. As chains expand, quality becomes more important, an advantage for U.S. products. The growing retail sector in Russia must become a factor in U.S. exporter strategy as the traditional markets, where most U.S. poultry is currently sold, slowly give way to large retailers. This will require re-evaluating what products and packaging will satisfy consumers' demand for quality goods.

According to market experts, per capita monthly income in Russia will keep growing and will reach \$600 in Russia and \$1,500 in Moscow by 2012. Per capita income in large Russian large cities will increase twofold over the same period of time. This represents a large future growth in consumption of food because of Russia's large population. For more information about trends in retailing and the new marketing challenges, please reference GAIN reports RS4317 and RS4318.

PSD Table

Country Commodity	Russian Federation		(1000 HEAD)			
	Animal Numbers, Cattle		2004	Estimate	2005	Forecast
Market Year Begin	2003 USDA Official [Old]	Revised Post Estimate [New] 01/2003	USDA Official [Old]	Post Estimate [New] 01/2004	USDA Official [Old]	Post Estimate [New] 01/2005
Total Cattle Beg. Stks	23500	23500	22285	22285	20995	21100
Dairy Cows Beg. Stks	11700	11700	10970	10970	10640	10430
Beef Cows Beg. Stocks	0	0	0	0	0	0
Production (Calf Crop)	8845	8845	8400	8400	8200	7950
Intra EC Imports	0	0	0	0	0	0
Total Imports	9	9	10	10	10	10
TOTAL Imports	9	9	10	10	10	10
TOTAL SUPPLY	32354	32354	30695	30695	29205	29060
Intra EC Exports	0	0	0	0	0	0
Total Exports	8	8	5	5	5	5
TOTAL Exports	8	8	5	5	5	5
Cow Slaughter	1720	1720	1650	1700	1620	1600
Calf Slaughter	0	0	0	0	0	0
Other Slaughter	8000	8000	7785	7690	7380	7250
Total Slaughter	9720	9720	9435	9390	9000	8850
Loss	341	341	260	200	200	105
Ending Inventories	22285	22285	20995	21100	20000	20100
TOTAL DISTRIBUTION	32354	32354	30695	30695	29205	29060
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

PSD Table

Country Commodity	Russian Federation		(1000 HEAD)			
	Animal Numbers, Swine		2003	2004	Estimate	2005
Market Year Begin	USDA Official [Old]	Revised Post Estimate [New] 01/2003	USDA Official [Old]	Estimate Post Estimate [New] 01/2004	USDA Official [Old]	Forecast Post Estimate [New] 01/2005
TOTAL Beginning Stocks	17000	17000	17200	17200	17600	16500
Sow Beginning Stocks	3300	3300	3340	3340	3400	3450
Production (Pig Crop)	35000	35000	35800	35000	36700	36600
Intra EC Imports	0	0	0	0	0	0
Total Imports	35	35	35	35	35	40
TOTAL Imports	35	35	35	35	35	40
TOTAL SUPPLY	52035	52035	53035	52235	54335	53140
Intra EC Exports	0	0	0	0	0	0
Total Exports	1	1	1	1	1	1
TOTAL Exports	1	1	1	1	1	1
Sow Slaughter	0	0	0	0	0	0
OTHER SLAUGHTER	30600	30600	31000	31300	31900	31505
Total Slaughter	30600	30600	31000	31300	31900	31505
Loss	4234	4234	4434	4434	4434	4434
Ending Inventories	17200	17200	17600	16500	18000	17200
TOTAL DISTRIBUTION	52035	52035	53035	52235	54335	53140
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

PSD Table

Country Commodity	Russian Federation Meat, Beef and Veal		(1000 MT CWE)(1000 HEAD)			
	2003 USDA Official [Old]	Revised Post Estimate [New] 01/2003	2004 USDA Official [Old]	Estimate Post Estimate [New] 01/2004	2005 USDA Official [Old]	Forecast Post Estimate [New] 01/2005
Market Year Begin						
Slaughter (Reference)	9720	9720	9435	9390	9000	8850
Beginning Stocks	0	0	0	0	0	0
Production	1670	1670	1610	1590	1550	1550
Intra EC Imports	0	0	0	0	0	0
Total Imports	650	650	650	660	650	700
TOTAL Imports	650	650	650	660	650	700
TOTAL SUPPLY	2320	2320	2260	2250	2200	2250
Intra EC Exports	0	0	0	0	0	0
Total Exports	5	5	5	5	5	5
TOTAL Exports	5	5	5	5	5	5
Human Dom. Consumption	2270	2270	2205	2195	2150	2200
Other Use, Losses	45	45	50	50	45	45
TOTAL Dom. Consumption	2315	2315	2255	2245	2195	2245
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	2320	2320	2260	2250	2200	2250
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

PSD Table

Country Russian Federation	Commodity	Meat, Swine		(1000 MT CWE)(1000 HEAD)			
		2003 USDA Official [Old]	Revised Post Estimate [New] 01/2003	2004 USDA Official [Old]	Estimate Post Estimate [New] 01/2004	2005 USDA Official [Old]	Forecast Post Estimate [New] 01/2005
	Market Year Begin						
	Slaughter (Reference)	30600	30600	31000	31300	31900	31505
	Beginning Stocks	0	0	0	0	0	0
	Production	1710	1710	1740	1725	1790	1760
	Intra EC Imports	0	0	0	0	0	0
	Total Imports	620	620	500	475	500	500
	TOTAL Imports	620	620	500	475	500	500
	TOTAL SUPPLY	2330	2330	2240	2200	2290	2260
	Intra EC Exports	0	0	0	0	0	0
	Total Exports	1	1	1	1	1	1
	TOTAL Exports	1	1	1	1	1	1
	Human Dom. Consumption	2245	2245	2179	2139	2224	2194
	Other Use, Losses	84	84	60	60	65	65
	TOTAL Dom. Consumption	2329	2329	2239	2199	2289	2279
	Ending Stocks	0	0	0	0	0	0
	TOTAL DISTRIBUTION	2330	2330	2240	2200	2290	2280
	Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
	Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Russian Pork Imports

2004

Quantity (MT)		2002	2003	Jan.	Feb.	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	YTD
0203	PORK,FRESH OR FROZEN	602,010	533,871	17,654	14,212	40,723	44,077	38,225	38,176	31,318	34,972	42,460	36,548	38,279	376,646
020321	FROZEN CUT BONELESS	301,929	266,729	9,651	5,740	20,427	26,310	26,485	24,040	20,339	20,276	26,272	22,041	20,526	222,109
020329	FROZEN CARCASSES	238,026	228,899	7,690	7,699	16,366	11,681	8,880	11,318	8,152	11,488	12,844	12,221	10,893	119,231
020311	FROZEN CUTS+BONES	55,756	29,632	294	614	3,550	4,946	2,365	2,515	2,507	2,827	3,002	1,661	5,501	29,781
020322	FRESH CARCASSES	4,856	6,786	20	120	261	1,005	377	186	200	140	170	395	1,111	3,984
020319	FRESH CUTS BONELESS	1,358	1,805	0	39	119	135	118	118	120	242	172	230	250	1,542
020312	FRESH CUTS+BONES	85	20	NA											

Value (Million USD)		2002	2003	Jan.	Feb.	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	YTD
0203	PORK,FRESH OR FROZEN	672	651	24	17	51	58	54	53	44	48	60	53	53	514
020321	FROZEN CUT BONELESS	366	369	15	8	29	38	41	36	31	31	41	35	30	336
020329	FROZEN CARCASSES	239	237	8	8	17	13	10	13	9	13	14	14	13	132
020311	FROZEN CUTS+BONES	59	34	0	1	4	6	3	3	3	4	4	2	7	37
020322	FRESH CARCASSES	7	8	0	0	0	1	1	0	0	0	0	1	2	6
020319	FRESH CUTS BONELESS	2	3	0	0	0	0	0	0	0	0	0	0	0	3
020312	FRESH CUTS+BONES	0	0	0	0	0	0	0	0	0	0	0	0	0	0

0203	PORK,FR./FR. Qty. (MT)	2002	2003	Jan.	Feb.	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	YTD
1	Brazil -	349,799	312,693	15,475	4,047	18,282	21,356	27,773	28,111	22,008	23,810	31,986	24,827	13,629	231,302
2	Germany -	29,652	16,351	47	611	1,572	2,066	708	1,118	1,207	1,411	906	2,289	5,308	17,243
3	Denmark -	41,437	20,440	97	887	3,063	2,616	1,735	1,586	1,809	1,904	2,227	1,649	3,589	21,161
4	France -	16,301	8,111	0	587	1,703	1,918	500	782	583	560	917	1,363	2,693	11,605
5	United States -	16,018	2,734	173	52	659	1,854	869	1,582	1,355	1,339	696	774	2,403	11,756
6	Netherlands -	7,644	4,134	0	110	1,258	1,691	469	354	353	509	496	694	2,259	8,194
7	China -	67,519	43,757	432	374	1,251	3,194	3,065	2,474	1,568	1,636	1,992	1,010	1,964	18,960
8	Poland -	17,153	78,466	850	5,007	9,086	4,785	447	180	217	348	480	1,383	1,767	24,549
9	Canada -	26,446	14,041	0	0	150	149	242	96	74	50	88	223	1,108	2,180
10	Spain -	1,900	2,785	0	25	67	201	66	236	278	236	333	308	923	2,672

0203	Mkt. Share (% of Qty.)	2002	2003	Jan.	Feb.	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	YTD
1	Brazil -	58.1%	58.6%	87.7%	28.5%	44.9%	48.5%	72.7%	73.6%	70.3%	68.1%	75.3%	67.9%	35.6%	61.4%
2	Germany -	4.9%	3.1%	0.3%	4.3%	3.9%	4.7%	1.9%	2.9%	3.9%	4.0%	2.1%	6.3%	13.9%	4.6%
3	Denmark -	6.9%	3.8%	0.5%	6.2%	7.5%	5.9%	4.5%	4.2%	5.8%	5.4%	5.2%	4.5%	9.4%	5.6%
4	France -	2.7%	1.5%	0.0%	4.1%	4.2%	4.4%	1.3%	2.0%	1.9%	1.6%	2.2%	3.7%	7.0%	3.1%
5	United States -	2.7%	0.5%	1.0%	0.4%	1.6%	4.2%	2.3%	4.1%	4.3%	3.8%	1.6%	2.1%	6.3%	3.1%
6	Netherlands -	1.3%	0.8%	0.0%	0.8%	3.1%	3.8%	1.2%	0.9%	1.1%	1.5%	1.2%	1.9%	5.9%	2.2%
7	China -	11.2%	8.2%	2.4%	2.6%	3.1%	7.2%	8.0%	6.5%	5.0%	4.7%	4.7%	2.8%	5.1%	5.0%
8	Poland -	2.8%	14.7%	4.8%	35.2%	22.3%	10.9%	1.2%	0.5%	0.7%	1.0%	1.1%	3.8%	4.6%	6.5%
9	Canada -	4.4%	2.6%	0.0%	0.0%	0.4%	0.3%	0.6%	0.3%	0.2%	0.1%	0.2%	0.6%	2.9%	0.6%
10	Spain -	0.3%	0.5%	0.0%	0.2%	0.2%	0.5%	0.2%	0.6%	0.9%	0.7%	0.8%	0.8%	2.4%	0.7%

Russian Beef Imports

2004

Quantity (MT)		2002	2003	Jan.	Feb.	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	YTD
0202	BEEF, FROZEN	469,141	495,031	10,313	10,111	30,935	35,825	40,437	41,184	50,806	53,818	54,817	35,991	55,732	419,970
020230	CUTS BONELESS	325,928	387,030	8,763	6,918	26,584	31,364	36,444	36,194	43,388	47,091	48,437	30,516	49,837	365,537
020210	CARC, WH/HALF	96,397	95,827	1,357	2,938	4,351	4,460	3,990	4,982	6,769	6,719	6,369	4,827	4,241	51,003
020220	CUTS W BONE	46,816	12,174	192	255	0	0	3	8	649	9	12	648	1,654	3,429
0201	BEEF FR, CH	35,459	10,015	0	423	1,186	1,874	1,473	1,533	2,009	2,110	1,991	2,510	2,123	17,232
020130	CUTS BONELESS	34,212	9,891	0	405	1,185	1,872	1,454	1,494	1,957	1,949	1,784	2,374	2,121	16,596
020120	CUTS W BONE	1,229	124	0	18	1	2	19	38	39	147	117	60	2	443
020110	CARC, WH/HALF	18	0	0	0	0	0	0	0	14	14	90	75	0	193

Value (Million USD)		2002	2003	Jan.	Feb.	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	YTD
0202	BEEF, FROZEN	540	602	13	15	41	49	55	57	71	73	74	51	70	569
020230	CUTS BONELESS	369	465	11	10	33	41	48	48	57	61	62	40	60	470
020210	CARC, WH/HALF	127	125	2	5	8	8	7	9	13	13	12	9	8	96
020220	CUTS W BONE	44	12	0	0	0	0	0	0	1	0	0	1	2	3
0201	BEEF FR, CH	49	14	0	1	2	3	2	2	3	3	3	4	3	26
020130	CUTS BONELESS	48	13	0	1	2	3	2	2	3	3	3	3	3	25
020120	CUTS W BONE	2	0	0	0	0	0	0	0	0	0	0	0	0	1
020110	CARC, WH/HALF	0	0	0	0	0	0	0	0	0	0	0	0	0	0

0202	BEEF, FROZEN Qty. (MT)	2002	2003	Jan.	Feb.	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	YTD	
1	Brazil	-	27,087	90,503	4,502	1,739	6,407	3,762	10,378	12,823	13,904	18,809	19,526	10,090	24,953	126,894
2	Argentina	-	0	22,020	367	795	2,093	1,432	4,552	5,844	9,937	11,072	10,173	7,021	11,093	64,379
3	Ukraine	-	128,578	144,904	1,732	4,453	6,682	7,552	7,195	7,567	9,624	8,970	8,494	6,243	4,898	73,410
4	Ireland	-	61,943	58,310	1,471	484	2,040	3,467	2,499	3,046	2,330	2,596	3,445	3,451	3,777	28,605
5	Paraguay	-	3,790	1,768	153	131	109	53	673	1,972	1,437	2,362	3,887	1,852	2,666	15,296
0201	BEEF FRESH, CHILLED Qty. (MT)															
1	Germany	-	32,189	9,229	0	404	1,109	1,656	1,379	1,316	1,622	1,687	1,584	1,688	1,429	13,875
2	Netherlands	-	272	316	0	0	38	97	32	97	55	58	19	57	271	724
3	Lithuania	-	15	9	0	18	0	0	18	55	70	206	173	203	233	976
4	Brazil	-	0	25	0	0	0	0	0	0	45	24	27	451	125	672
5	Belgium	-	251	39	0	0	0	0	0	38	77	77	77	19	38	326

0202	Mkt. Share (% of Qty.)	2002	2003	Jan.	Feb.	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	YTD	
1	Brazil	-	5.8%	18.3%	43.7%	17.2%	20.7%	10.5%	25.7%	31.1%	27.4%	34.9%	35.6%	28.0%	44.8%	30.2%
2	Argentina	-	0.0%	4.4%	3.6%	7.9%	6.8%	4.0%	11.3%	14.2%	19.6%	20.6%	18.6%	19.5%	19.9%	15.3%
3	Ukraine	-	27.4%	29.3%	16.8%	44.0%	21.6%	21.1%	17.8%	18.4%	18.9%	16.7%	15.5%	17.3%	8.8%	17.5%
4	Ireland	-	13.2%	11.8%	14.3%	4.8%	6.6%	9.7%	6.2%	7.4%	4.6%	4.8%	6.3%	9.6%	6.8%	6.8%
5	Paraguay	-	0.8%	0.4%	1.5%	1.3%	0.4%	0.1%	1.7%	4.8%	2.8%	4.4%	7.1%	5.1%	4.8%	3.6%
0201																
1	Germany	-	90.8%	92.2%	0.0%	95.6%	93.5%	88.4%	93.6%	85.9%	80.7%	79.9%	79.6%	67.3%	67.3%	80.5%
2	Netherlands	-	0.8%	3.2%	0.0%	0.0%	3.2%	5.2%	2.2%	6.3%	2.7%	2.8%	1.0%	2.3%	12.8%	4.2%
3	Lithuania	-	0.0%	0.1%	0.0%	4.3%	0.0%	0.0%	1.2%	3.6%	3.5%	9.8%	8.7%	8.1%	11.0%	5.7%
4	Brazil	-	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	1.1%	1.4%	18.0%	5.9%	3.9%
5	Belgium	-	0.7%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.025	0.038	0.036	0.039	0.008	0.018	1.9%