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**Report Highlights:**

The Canadian cattle herd continues to contract while African Swine Fever (ASF) and market volatility concerns reduce the Canadian swine herd. Increased imports of U.S. feeder cattle are driven by strong Canadian feedlot demand, but imports will be reduced in 2020 due to constraints in Eastern Canada and contraction of the U.S. cattle herd. Canadian beef exports will increase in 2020 on strong global demand and the reopening of the Chinese market to Canadian beef in late 2019. A reduction in the Canadian sow herd will see a diminished pig crop in 2020. The increase in slaughter and a further contraction of the Canadian swine herd in 2020 is driven by increased global demand for pork. The United States continues to be the dominant import/export market for Canadian beef and pork products.

**Key Words:** Canada, Livestock, Cattle, Beef, Swine, Pork

\*\*\*NOTE\*\*\*

**Please see Appendix A for a description of changes to trade data as a result of new conversion rates to obtain carcass weight equivalent (CWE) values for trade data.**

## CATTLE and BEEF

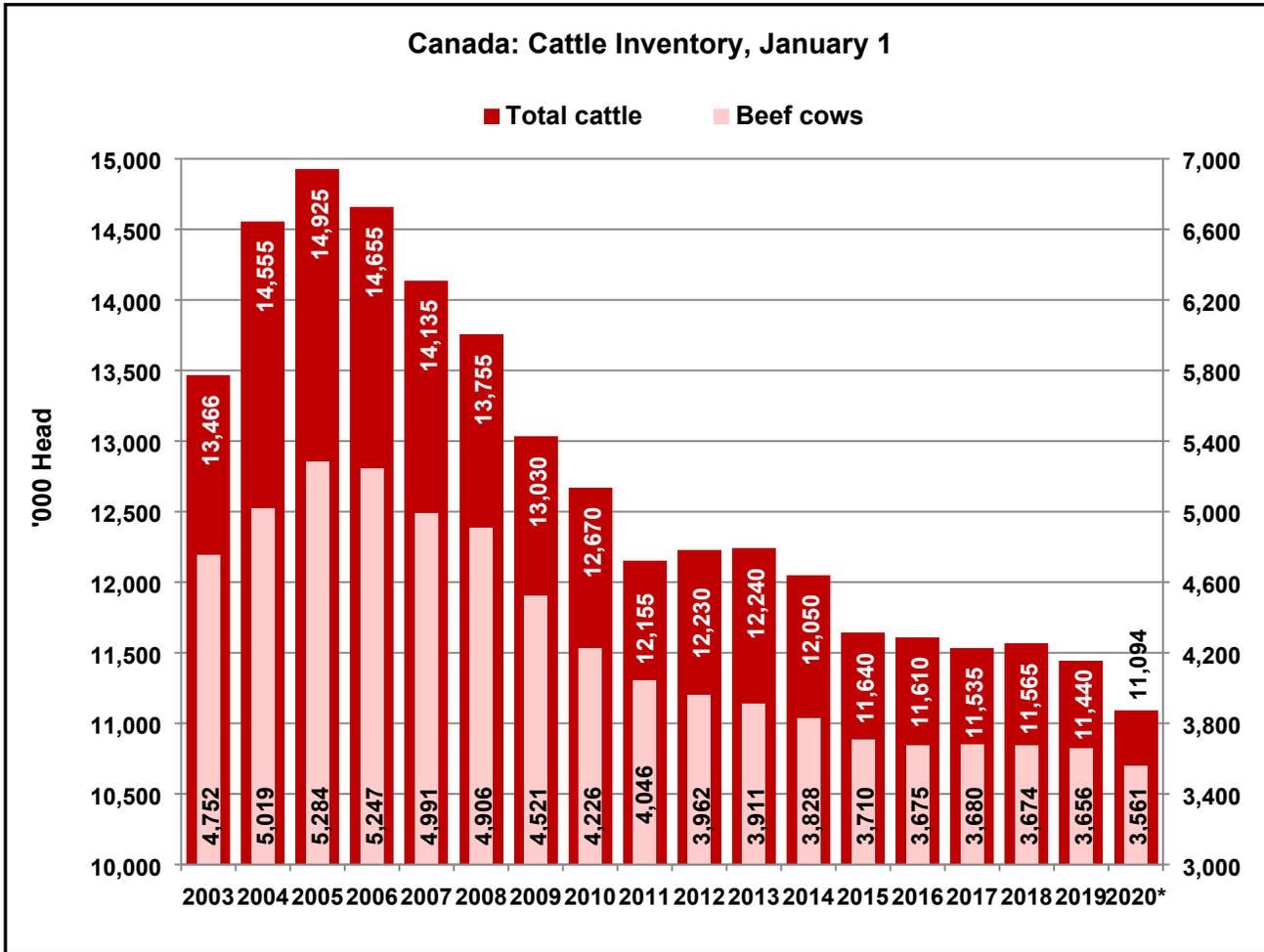
### Production, Supply and Distribution Estimates Cattle

CANADA Animal Numbers CATTLE ('000 head)	2018		2019		2020	
	USDA Official Data	NEW FAS/Ottawa Data	USDA Official Data	NEW FAS/Ottawa Estimates	USDA Official Data	NEW FAS/Ottawa Estimates
Total Cattle Beg. Stks	11,565	11,565	11,440	11,440	11,045	11,094
Dairy Cows Beg. Stocks	972	972	978	978	970	981
Beef Cows Beg. Stocks	3,674	3,674	3,656	3,656	3,670	3,561
Production (Calf Crop)	4,292	4,287	4,325	4,251	4,400	4,200
Total Imports	202	202	260	275	250	260
<b>Total Supply</b>	<b>16,059</b>	<b>16,054</b>	<b>16,025</b>	<b>15,966</b>	<b>15,695</b>	<b>15,554</b>
Total Exports	631	631	730	725	700	725
Cow Slaughter	535	535	540	540	470	470
Calf Slaughter	234	234	235	210	200	200
Total Slaughter	3,465	3,465	3,725	3,625	3,770	3,700
Loss	523	518	525	522	510	510
Ending Inventories	11,440	11,440	11,045	11,094	10,715	10,619
<b>Total Distribution</b>	<b>16,059</b>	<b>16,054</b>	<b>16,025</b>	<b>15,966</b>	<b>15,695</b>	<b>15,554</b>

*NOTE: "NEW FAS/Ottawa" data reflect author's assessments and are NOT official USDA data*

### Cattle Supply: Contraction of the Canadian Cattle Herd Perseveres

FAS/Ottawa forecasts that the Canadian cattle herd will continue to decline in 2020. Total herd numbers will be reduced by three percent at the beginning of 2020 and will be down an additional four percent by the end of 2020. Significant culling practices and a lack of replacement heifer retention limits Canadian herd growth. Official Canadian statistics report a reduction in beef cow numbers for January 2020 due to increased cow slaughter in 2019. This is a result of forage shortages in certain regions caused by drought. Heifer retention was also reduced, and the 2020 calf crop is forecast to be one percent lower than 2019. Improved fertility will result in a slightly improved cow-to-calf outcome in 2020 as a beneficial impact from last year's culling. More favorable weather conditions, improved forage, and increased prices will support cow-calf producers, but current herd size and slaughter activity will constrain any expansion in 2020.



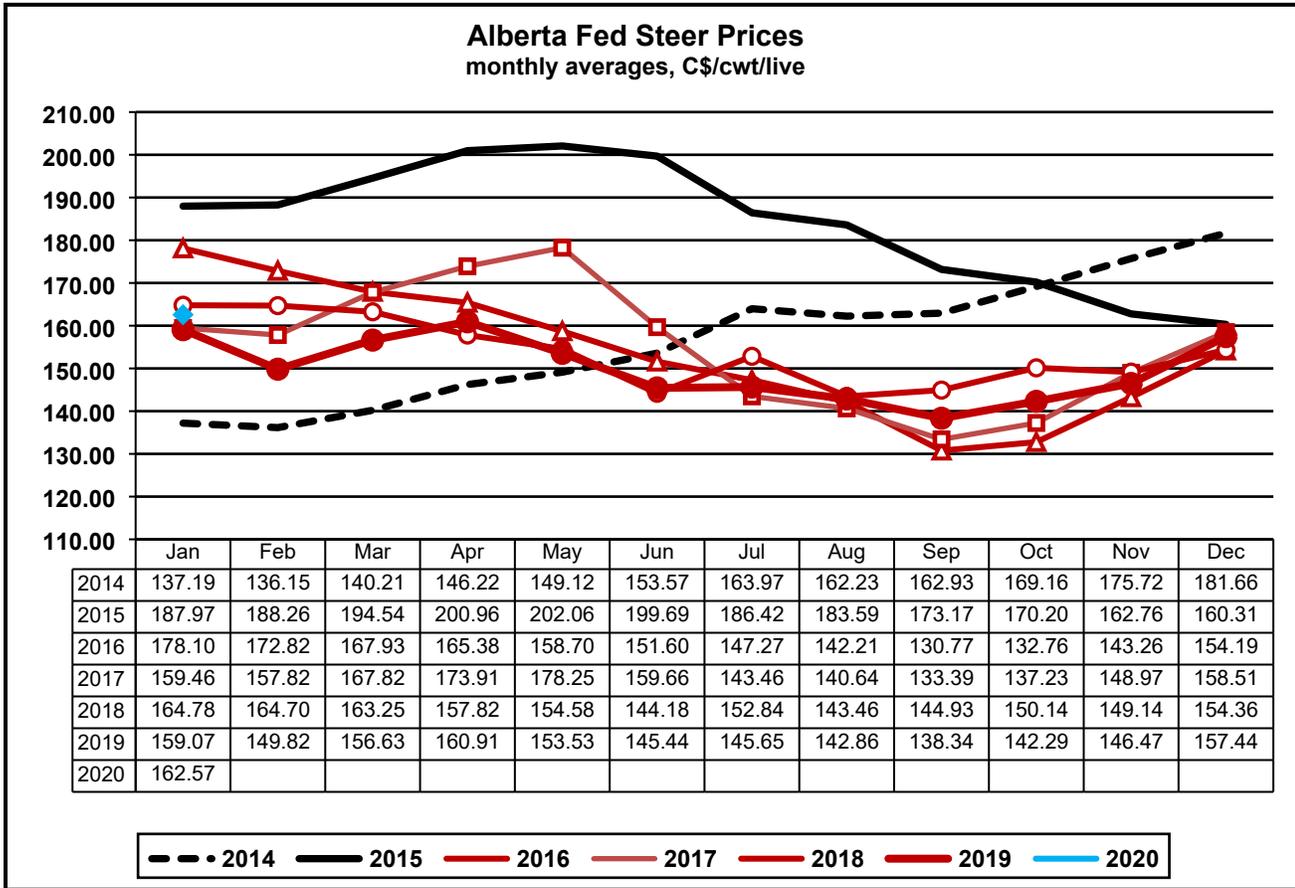
Source: Statistics Canada, \*FAS/Ottawa estimate

### Live Cattle Trade: Import and Export Activity Eases

Live cattle imports are forecast to decline five percent in 2020. This follows record imports in 2019 which was a 36 percent increase over 2018. Expanded activity in feedlots, primarily in Western Canada, and a reduced Canadian calf crop had supported strong U.S. feeder cattle imports. However, contraction of the U.S. herd in 2020 and the loss of a slaughter facility in Eastern Canada will cause live imports to decline. U.S. and Canadian cattle on feed numbers are up in the first quarter of 2020 but, moving forward, Canadian feeder cattle buyers are likely to experience more competition to secure feeder cattle due to a smaller U.S. calf crop.

#### Imports

The closure of a slaughter facility in Ontario has negatively impacted slaughter capacity in Eastern Canada. Eastern Canadian feedlots have also been importing U.S. feeder cattle, although to a lesser extent than Western Canada, and are likely to reduce the number of U.S. feeder cattle they import in response to reduced slaughter capacity. However, a strong outlook for beef exports and an expectation of improved feed costs will support cattle feeding activity in Canada for 2020 and U.S. feeder imports will be needed to supplement the Canadian feeder availability.



Source: Canfax



Source: Canfax

#### Exports

FAS/Ottawa forecasts live cattle exports to remain stable in 2020. Supply constraints in Eastern Ontario, contracts with U.S. slaughter plants for Western Canadian cattle feedlots, and U.S. slaughter demand will continue to support fed cattle exports. A reduced Canadian calf crop, competition from

Canadian feedlots, and improved feed costs in Canada will continue to limit Canadian feeder cattle exports to the United States. Retention of cows due to improved forage availability will also lead to decreased slaughter cow exports.

### Production, Supply and Distribution Estimates Beef

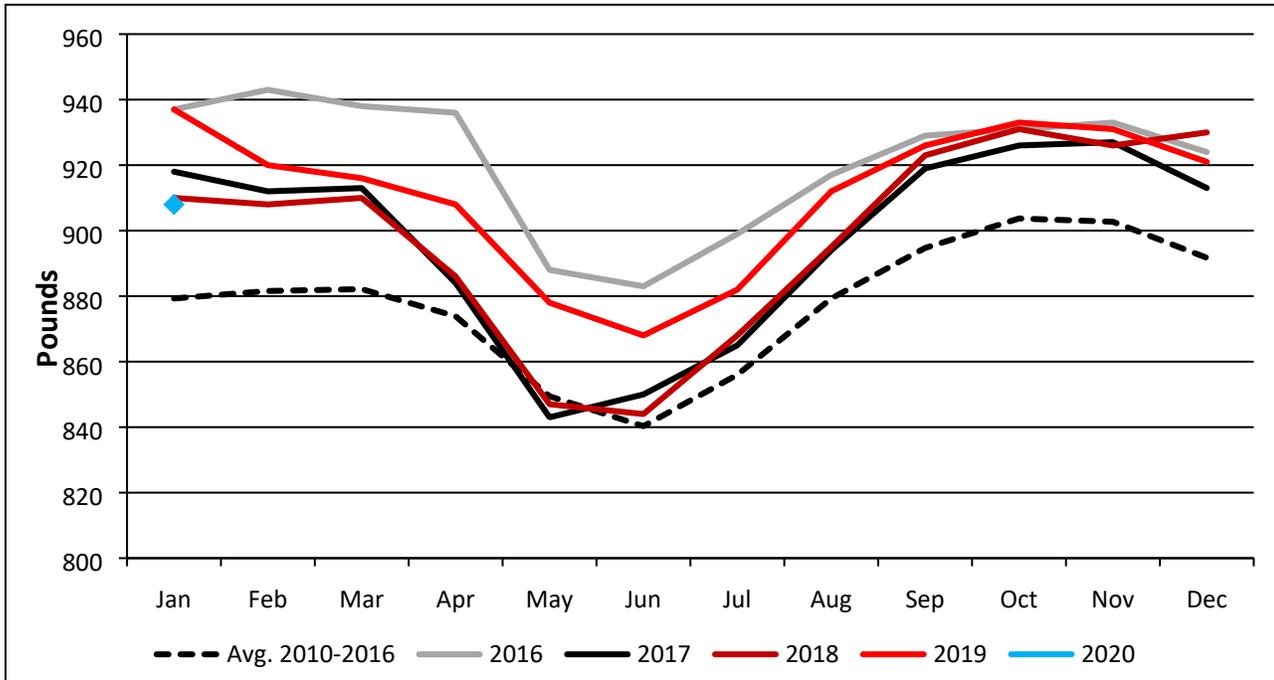
CANADA Meat BEEF and VEAL	2018		2019		2020	
	USDA Official Data	NEW FAS/Ottawa Data	USDA Official Data	NEW FAS/Ottawa Estimates	USDA Official Data	NEW FAS/Ottawa Estimates
Slaughter (Reference)	3,465	3,465	3,725	3,625	3,770	3,700
Beginning Stocks	33	33	42	42	35	33
Production	1,265	1,265	1,350	1,340	1,370	1,365
Total Imports	245	236	215	204	215	210
Total Supply	1,543	1,534	1,607	1,586	1,620	1,608
Total Exports	502	478	560	525	610	590
Total Dom. Consumption	999	1,014	1,012	1,028	985	993
Ending Stocks	42	42	35	33	25	25
Total Distribution	1,543	1,534	1,607	1,586	1,620	1,608

Data in '000 metric tons, except for "slaughter" which is in '000 head

NOTE: "NEW FAS/Ottawa" data reflect author's assessments and are NOT official USDA data

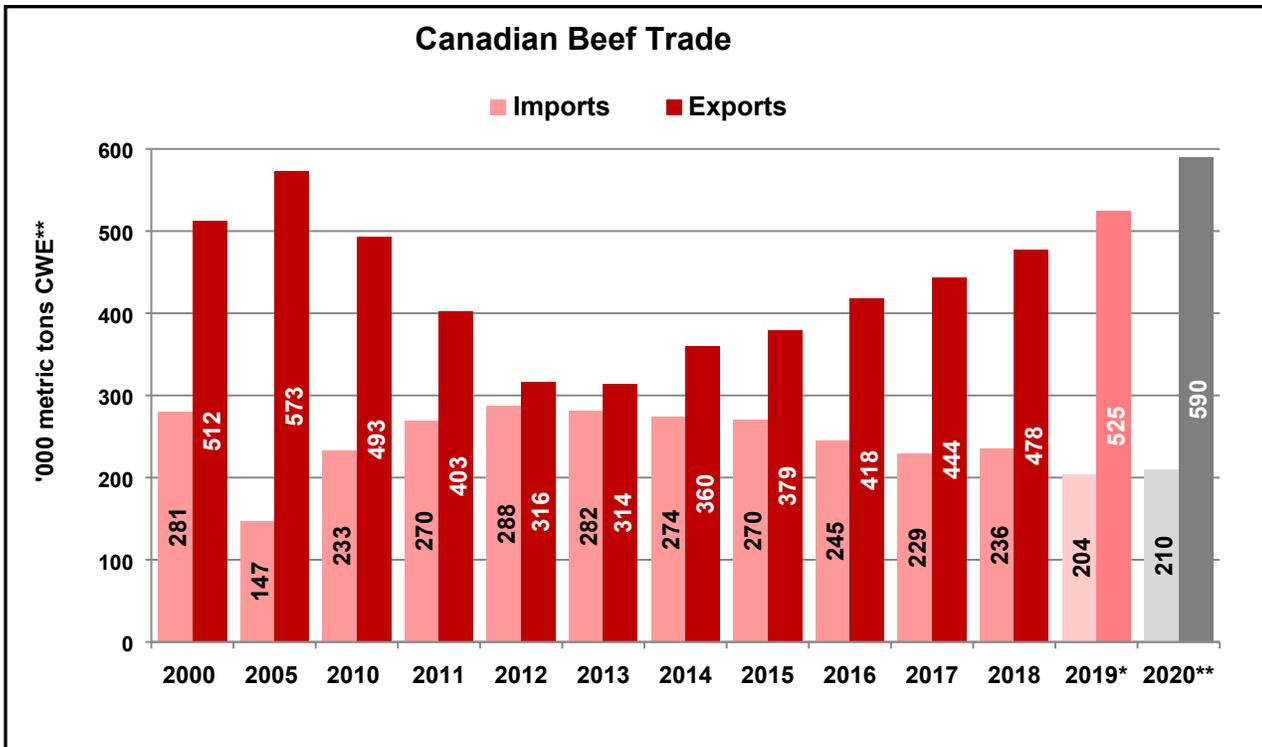
### Beef Production: Slaughter Increases

FAS/Ottawa forecasts a two percent growth in Canadian cattle slaughter for 2020 with beef production increasing by two percent. Large numbers of cattle on feed and placements in the last quarter of 2019 will see slaughter pace increase in the first half of 2020. Canada's capacity utilization will also remain high as the impact of the cancellation of the Safe Food for Canadians Regulations license of one of Ontario's slaughter plants, responsible for 10 to 15 percent of Ontario slaughter, continues to be felt. As a result, Eastern Canada slaughter capacity has been under strain since September 2019. Carcass weights will be slightly reduced in 2020 but will remain above the five-year average. Some cattle will be held longer on feed in the first half of the year while slaughter capacity issues continue to be worked out. Cow slaughter is expected to decline in 2020 as Canada looks to mitigate the continued contraction of the domestic herd. However, this will be contingent on weather as well as feed/forage availability and costs. The last two years have seen increased cow slaughter and increased heifer slaughter as a result of difficult weather events in the Prairie and Western Provinces. Poor feed availability and outlook for cow-calf producers resulted in periods of herd liquidation. Slaughter growth will be limited due to labor challenges and a lack of expansion in the Canadian processing sector.



Source: Canfax

### Beef Trade: Exports Continue to Grow



Source: Trade Data Monitor, LLC/FAS/Ottawa \*estimate \*\*forecast

Exports of Canadian beef are forecast to grow 12 percent in 2020, continuing the trend of year-over-year increases. Despite being blocked from the Chinese market for nearly four months, exports were up ten percent in 2019. In the first quarter of 2020, rail blockages and COVID-19 challenged exports and the delivery of product. Logistical challenges with a lack of container availability have been exacerbated by the COVID-19 epidemic in China coinciding with Lunar New Year, though backlogs are expected to eventually clear. ASF in China and other Asian countries will contribute to Canadian beef exports to those regions in 2020. Exports to Japan will remain strong, although Canadian beef will face increased competition from U.S. beef once the two countries face the same tariff rate under the U.S.-Japan trade deal. The United States will continue to be the dominate export market for Canadian beef in 2020, although market share will decline as Canada continues to diversify its export markets.

FAS/Ottawa forecasts 2020 imports to increase three percent following a fourteen percent decline in 2019. Increased domestic slaughter and decreased consumption will mitigate import activity. Increased competition in the protein sector will see per capita consumption fall following stable performance in 2019. The United States will continue to provide over 60 percent of Canada’s beef imports while the EU will continue to make marginal gains.

<b>Canada Beef and Veal Exports</b>						
<b>Partner</b>	<b>Annual Series (January - December)</b>					
	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
World	359,618	378,915	418,133	443,518	477,501	524,964
EU 28	1,019	449	432	618	1,704	3,028
<b>United States</b>	<b>274,121</b>	<b>285,683</b>	<b>332,552</b>	<b>347,214</b>	<b>371,129</b>	<b>395,904</b>
Japan	20,211	12,918	18,854	27,601	36,138	59,061
Hong Kong	23,217	9,416	27,533	25,572	24,390	19,904
Mexico	21,579	17,677	15,942	16,760	16,560	18,211
China	8,914	44,298	8,139	10,573	13,574	13,768
All other countries	11,576	8,923	15,113	15,798	15,710	18,116
<b>% Market Share</b>						
EU 28	0.28	0.12	0.10	0.14	0.36	0.58
<b>United States</b>	<b>76.23</b>	<b>75.40</b>	<b>79.53</b>	<b>78.29</b>	<b>77.72</b>	<b>75.42</b>
Japan	5.62	3.41	4.51	6.22	7.57	11.25
Hong Kong	6.46	2.48	6.58	5.77	5.11	3.79
Mexico	6.00	4.67	3.81	3.78	3.47	3.47
China	2.48	11.69	1.95	2.38	2.84	2.62
All other countries	3.22	2.35	3.61	3.56	3.29	3.45

Source: Trade Data Monitor, LLC / \*Conversion to carcass weight equivalent (CWE) (see Appendix A for conversion note)

## Canada Beef and Veal Imports

Partner	Annual Series (January - December)					
	2014	2015	2016	2017	2018	2019
World	273,746	270,134	244,830	229,468	235,654	204,412
EU 28	8	4	1,077	1,863	2,030	7,490
<b>United States</b>	<b>172,265</b>	<b>156,268</b>	<b>146,963</b>	<b>150,283</b>	<b>147,596</b>	<b>130,427</b>
Australia	46,756	54,948	37,628	25,499	31,097	22,109
New Zealand	22,467	34,927	28,225	26,107	26,055	19,059
Uruguay	25,277	18,399	20,853	16,858	12,473	10,860
Mexico	977	1,457	2,971	3,506	5,367	7,604
All other countries	6,004	4,135	8,190	7,215	13,066	14,353
<b>% Market Share</b>						
EU 28	0.00	0.00	0.44	0.81	0.86	3.66
<b>United States</b>	<b>62.93</b>	<b>57.85</b>	<b>60.03</b>	<b>65.49</b>	<b>62.63</b>	<b>63.81</b>
Australia	17.08	20.34	15.37	11.11	13.20	10.82
New Zealand	8.21	12.93	11.53	11.38	11.06	9.32
Uruguay	9.23	6.81	8.52	7.35	5.29	5.31
Mexico	0.36	0.54	1.21	1.53	2.28	3.72
All other countries	2.19	1.53	3.35	3.14	5.54	7.02

*Source: Trade Data Monitor, LLC / \*Conversion to carcass weight equivalent (CWE) (see Appendix A for conversion note)*

## SWINE and PORK

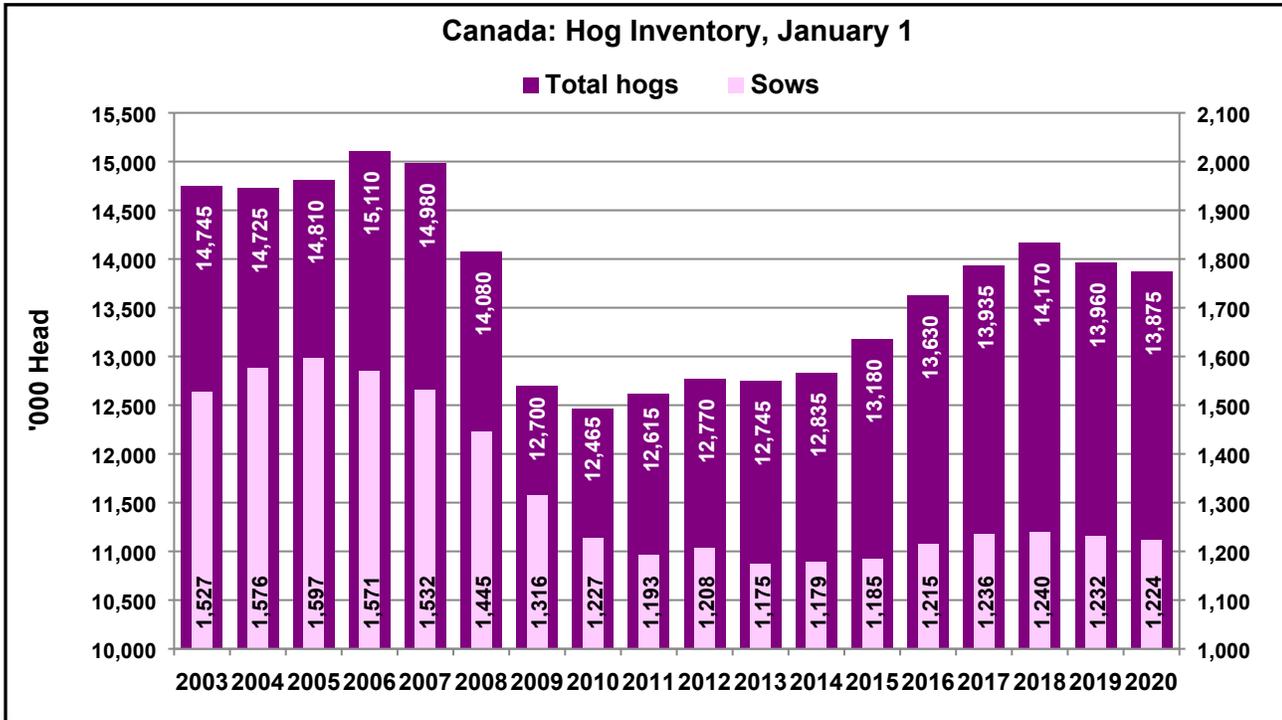
### Production, Supply and Distribution Estimates

CANADA Animal Numbers SWINE ('000 head)	2018		2019		2020	
	USDA Official Data	NEW FAS/Ottawa Data	USDA Official Data	NEW FAS/Ottawa Estimates	USDA Official Data	NEW FAS/Ottawa Forecast
Total Beginning Stocks	14,170	14,170	13,975	13,960	14,150	13,875
Sow Beginning Stocks	1,240	1,240	1,237	1,232	1,240	1,224
Production (Pig Crop)	28,027	28,017	28,450	28,272	28,900	28,250
Total Imports	3	3	5	6	3	3
<b>Total Supply</b>	<b>42,200</b>	<b>42,190</b>	<b>42,430</b>	<b>42,238</b>	<b>43,053</b>	<b>42,128</b>
Total Exports	5,263	5,263	5,050	5,116	5,000	5,000
Total Slaughter	21,562	21,566	21,800	21,839	22,280	22,000
Loss	1,400	1,401	1,430	1,408	1,423	1,400
Ending Inventories	13,975	13,960	14,150	13,875	14,350	13,728
<b>Total Distribution</b>	<b>42,200</b>	<b>42,190</b>	<b>42,430</b>	<b>42,238</b>	<b>43,053</b>	<b>42,128</b>

*NOTE: "NEW FAS/Ottawa" data reflect author's assessments and are NOT official USDA data*

### Swine Supply: Swine Inventories Decline

FAS/Ottawa forecasts a one percent decline in Canada's swine herd for 2020 following a one percent decline from January 2019 to January 2020. As a result of reduced sow beginning stocks, the 2020 pig crop is forecast to be down slightly from 2019. A modest gain in fertility will mitigate the reduction. Impacts of Porcine Epidemic Diarrhea virus (PEDv), higher construction costs, market volatility, and concerns about ASF have moderated expansion plans and most of the construction taking place is facility upgrades rather than a net gain on production spaces. Slaughter activity will remain strong, driven by steady pork export expectations.



Source: Statistics Canada

### Live Swine Trade: Fewer Hogs Imported in 2020

Live imports to Canada are forecast to decline 50 percent in 2020 as a result of rebounds in sow fertility and decreased piglet mortality from PEDv due to increased biosecurity protocols. This will represent a return to 2018 live import levels.

Feeder exports will rebound in 2020 as Manitoba recovers from the 2019 PEDv outbreak. Many feeders are produced in Manitoba but contracted to U.S. finishers and, while this relationship will continue, live exports will decline two percent. Market hog demand from the United States will be reduced on large numbers of U.S. hogs and a strong U.S. supply. Increased Canadian slaughter will also support market hogs remaining in Canada for processing.

## Production, Supply and Distribution Estimates

CANADA Meat SWINE	2018		2019		2020	
	USDA Official Data	NEW FAS/Ottawa Data	USDA Official Data	NEW FAS/Ottawa Estimates	USDA Official Data	NEW FAS/Ottawa Estimates
Slaughter (Reference)	21,562	21,566	21,800	21,839	22,280	22,000
Beginning Stocks	76	76	69	69	70	80
Production	1,955	1,955	2,020	2,020	2,085	2,065
Total Imports	233	228	250	242	260	255
Total Supply	2,264	2,259	2,339	2,331	2,415	2,400
Total Exports	1,331	1,277	1,330	1,284	1,400	1,380
Total Dom. Consumption	864	913	939	967	940	955
Ending Stocks	69	69	70	80	75	65
Total Distribution	2,264	2,259	2,339	2,331	2,415	2,400

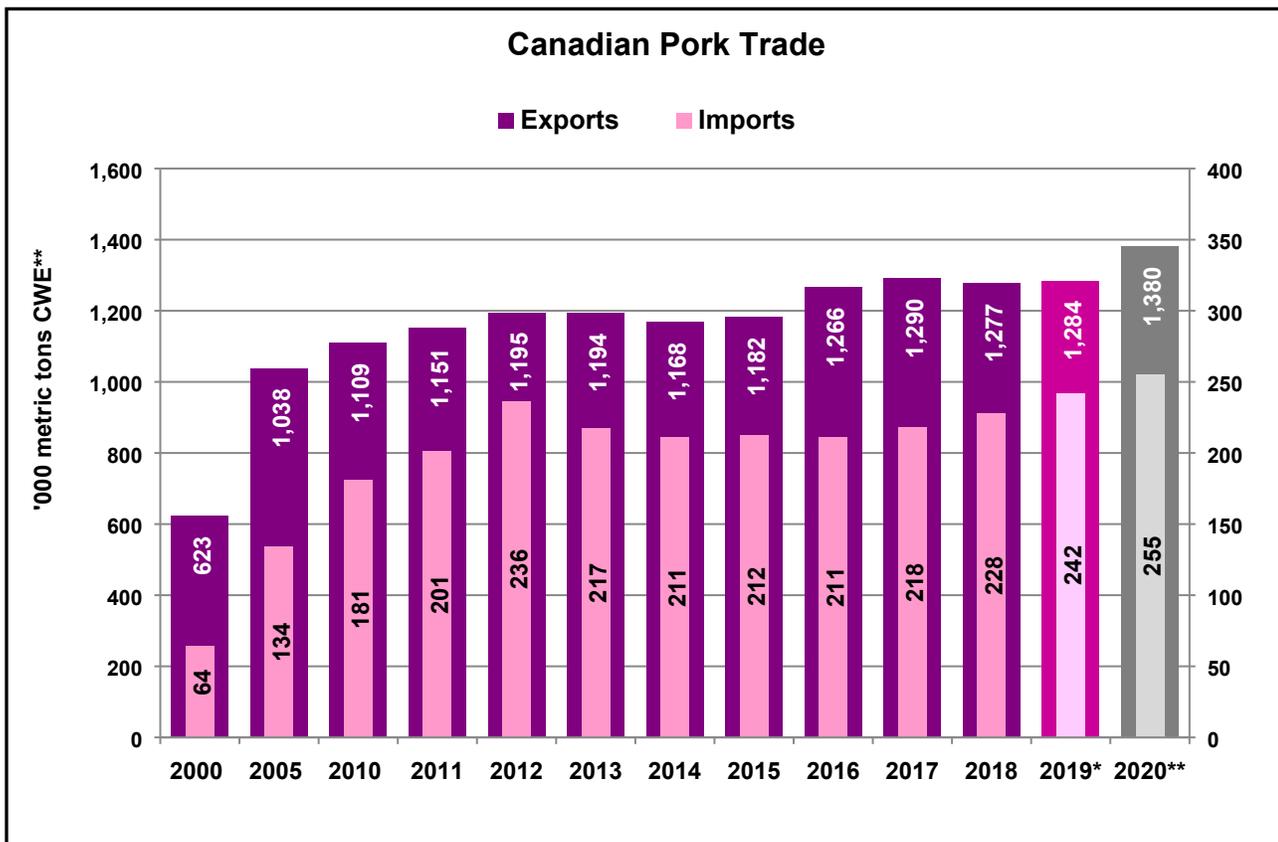
Data in '000 metric tons, except for "slaughter" which is in '000 head

**NOTE: "NEW FAS/Ottawa" data reflect author's assessments and are NOT official USDA data**

### Pork Production: Increased Slaughter and Heavier Carcasses

FAS/Ottawa forecasts slaughter to grow by one percent in 2020 with pork production up two percent. Carcass weights will increase once again supporting a two percent growth in production. Fewer losses will lead to increased slaughter numbers despite a slight reduction in the pig crop. Slaughter capacity utilization will continue to slowly improve, supported by a strong outlook for pork exports. However, large volumes of domestic stocks, due to increased slaughter in 2019 and restricted access to China from June to November 2019, will dampen production activity slightly.

## Pork Trade: Exports and Imports Grow



Source: Trade Data Monitor, LLC/FAS/Ottawa \*estimate \*\*forecast

FAS/Ottawa forecasts Canadian pork exports to grow seven percent in 2020. Canadian pork exports in 2019 were impacted by the Chinese market closing during the summer and fall 2019. Thus far in 2020, Canadian rail blockages and COVID-19 are potential challenges to export though sources report that the Canadian pork industry was minimally impacted by the rail blockages. Some product in the Prairies which would have moved by train was moved by truck and, while shipping costs increased, product was still moving. Logistical challenges with a lack of container availability continue to persist and have been further exacerbated by the COVID-19 epidemic in China. With quarantine and movement restrictions in China during the Lunar New Year period, containers of pork were reported to back-up in ports. Sources report that the situation is now improving but long-term impacts of COVID-19 and duration of broader global implications for pork exports remain unknown.

As ASF continues to impact the region, demand from Asia will support increased pork exports in 2020 to supplement the deficit created by a loss of local production. Canada will look to increase export activity in Asian markets, especially China and Japan, and increased export activity to Mexico and Europe are also anticipated as Canada focuses on diversifying export markets. Despite this diversification, the United States will remain the dominate export market for Canadian pork although market share will drop owing to strong U.S. domestic pork supplies.

FAS/Ottawa forecasts pork imports to increase by a further five percent in 2020 as Canada supports domestic demand while growing its exports. The United States will continue to supply close to 90 percent of Canadian pork imports.

<b>Canada Pork Exports</b>						
<b>Partner</b>	<b>Annual Series (January - December)</b>					
	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
World	1,168,343	1,182,492	1,265,686	1,290,375	1,277,479	1,283,784
EU 28	2,395	1,771	1,438	1,738	1,928	3,018
<b>United States</b>	<b>421,021</b>	<b>462,934</b>	<b>430,617</b>	<b>399,124</b>	<b>348,755</b>	<b>320,758</b>
Japan	226,183	250,470	246,343	284,267	298,978	298,200
China	97,033	110,766	304,643	282,243	282,549	257,919
Mexico	73,711	93,197	97,305	97,974	128,093	134,274
Taiwan	31,411	44,695	22,580	46,259	43,500	52,661
Philippines	27,422	31,595	28,563	44,217	50,628	52,077
South Korea	45,148	45,633	40,178	35,286	45,221	47,887
All other countries	246,414	143,202	95,457	101,005	79,755	120,008
<b>% Market Share</b>						
EU 28	0.20	0.15	0.11	0.13	0.15	0.24
<b>United States</b>	<b>36</b>	<b>39</b>	<b>34</b>	<b>31</b>	<b>27</b>	<b>25</b>
Japan	19	21	19	22	23	23
China	8	9	24	22	22	20
Mexico	6	8	8	8	10	10
Taiwan	3	4	2	4	3	4
Philippines	2	3	2	3	4	4
South Korea	4	4	3	3	4	4
All other countries	21	12	8	8	6	9

Source: Trade Data Monitor, LLC / \*Conversion to carcass weight equivalent (CWE) (see Appendix A for conversion note)

## Canada Pork Imports

Partner	Annual Series (January - December)					
	2014	2015	2016	2017	2018	2019
World	210,942	212,275	211,195	217,713	227,875	242,059
EU 28	15,279	17,840	25,624	23,948	30,616	27,033
<b>United States</b>	<b>193,394</b>	<b>191,221</b>	<b>182,010</b>	<b>190,269</b>	<b>194,419</b>	<b>211,180</b>
Denmark	3,181	3,001	3,447	3,965	6,190	6,602
Germany	5,248	4,861	6,141	4,151	5,187	5,954
Spain	1,550	2,658	5,828	3,612	4,112	3,541
Poland	1,701	3,088	5,243	6,179	7,299	3,451
All other countries	5,868	7,446	8,526	9,537	10,668	11,331
% Market Share						
EU 28	7.24	8.40	12.13	11.00	13.44	11.17
<b>United States</b>	<b>91.68</b>	<b>90.08</b>	<b>86.18</b>	<b>87.39</b>	<b>85.32</b>	<b>87.24</b>
Denmark	1.51	1.41	1.63	1.82	2.72	2.73
Germany	2.49	2.29	2.91	1.91	2.28	2.46
Spain	0.73	1.25	2.76	1.66	1.80	1.46
Poland	0.81	1.45	2.48	2.84	3.20	1.43
All other countries	2.78	3.51	4.04	4.38	4.68	4.68

Source: Trade Data Monitor, LLC / \*Conversion to carcass weight equivalent (CWE) (see Appendix A for conversion note)

### Policy

#### China

Canadian pork and beef exports to China were restricted on June 25, 2019. The Canadian Food Inspection Agency (CFIA) ceased issuing export certificates for Canadian pork and beef in response to the discovery of exports to China fraudulently identifying as Canadian exports. Resolutions were developed and implemented to address the situation and Canadian beef and pork exports to China regained access on November 5, 2019.

#### Pork Promotion and Research Agency

The proclamation for a Canadian Pork Promotion and Research Agency (PRA) was released in [Canada Gazette Part I](#) on Saturday March 7, 2020. The published proposal would see a levy collected on the marketing of hogs for interprovincial or export trade as well as an import levy on live hogs and pork products imported into Canada. The current proposal calls for a national levy amount of CAD 0.75 per head which would be applied to all imports; provincial levies may vary but only the national will apply

to imports. For pork imports, a conversion formula will be used to adjust the weight of the imported product to apply the levy.

As part of the gazette process, the Pork PRA proclamation will be open to consultation for 30 days.

**Comments should be submitted by April 6, 2020 to:**

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### **Transport Regulations**

In February 2019, CFIA announced [new regulations](#) surrounding maximum durations for animal transport before feed, water, and rest must be given. Table 1 outlines the change in maximum transport durations; loading and unloading are included in the maximum intervals. The new regulations came into force on February 20, 2020. However, in response to industry concerns, CFIA will implement a transition period of graduated enforcement for bovines and possibly other sectors. Both live imports and exports are subject to the new regulations.

**Table 1: Maximum intervals for access to feed and safe water**

<b>Species and class</b>	<b>New time maximum (hours)</b>	<b>Current time maximum (hours)</b>
Compromised animals	12	N/A
Broiler chickens, spent laying hens and rabbits	24 for safe water 28 for feed	36
Beef and dairy cattle and other adult ruminants that can be fed exclusively on hay and grain	36	48
Equines and porcines	28	36
All other animals	36	36
Ruminants that are too young to be fed exclusively on hay and grain	12	18
Newly hatched birds	72	72

*Source: Canada Gazette, Part II, Volume 153, Number 4*

## Appendix A

### Conversion Rates:

As a result of continuous efforts to improve data reliability, the “New Post” trade forecasts in this report reflect new conversion rates. Historical data revisions (from 2005 onward) will be published on April 9<sup>th</sup> in the PSD database (<http://www.fas.usda.gov/psdonline>).

<b>Beef and Veal Conversion Factors</b>		
Code	Description	Conversion Rate*
020110	Bovine carcasses and half carcasses, fresh or chilled	1.0
020120	Bovine cuts bone in, fresh or chilled	1.0
020130	Bovine cuts boneless, fresh or chilled	1.36
020210	Bovine carcasses and half carcasses, frozen	1.0
020220	Bovine cuts bone in, frozen	1.0
020230	Bovine cuts boneless, frozen	1.36
021020	Bovine meat salted, dried or smoked	1.74
160250	Bovine meat, offal nes, not livers, prepared/preserve	1.79
* Exception		
Argentina - Exports of HS 160250 are excluded.		

<b>Pork Conversion Factors</b>		Conversion factor
HS Code	Description	(T to CWE)
020311	Carcasses/half-carcasses, fr/ch	1.00
020312	Bone-In hams, shoulders and cuts thereof, fr/ch	1.00
020319	Other pork cuts, fr/ch	1.30
020321	Carcasses/half-carcasses, frozen	1.00
020322	Bone-In hams, shoulders and cuts thereof, frozen	1.00
020329	Other pork cuts, frozen	1.30
021011	Bone-In hams, shoulders and cuts thereof, processed	1.10
021012	Bellies (streaky) and cuts thereof, processed	1.20
021019	Other meat of swine, processed	1.16
160241	Hams and cuts thereof, prep/pres	1.30
160242	Shoulders and cuts thereof, prep/pres	1.30
160249	Other meat of swine including mixtures, prep/pres	1.30

### Technical Note

**The definition of Carcass Weight Equivalent/Product Weight Equivalent remains the same.** 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 internal organs, head, and skin. PWE is the actual weight of the meat product exported.

### **Attachments:**

No Attachments