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Spain

Livestock and Products

Annual

2000

Approved by:
Robert Wicks
U.S. Embassy, Madrid
Prepared by:
Diego Pazos

Report Highlights:
Spanish meat production (including poultry) rose to 4.9 million tons. Pork and beef production rose by 5 and 4 percent respectively in 1999. For the years 2000 and 2001, further increases in production are expected, due to good prices for pork and beef and lower prices for feed grains. During the last few years, large increases in pork consumption have been reported, but the domestic market now appears to be saturated. Any additional increase in production is expected to be exported. Spanish meat exports (including the meat equivalent of fed live animals) amounted to about 750,000 tons in 1999.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Madrid [SP1], SP

Executive Summary

In 1999, Spain increased meat and poultry production to 4.95 million tons, up 3.6 percent from 1998 and 1 million tons more than in 1995. For the year 2000, Spain could increase again meat production, encouraged by better pork prices, good pasture conditions, and lower prices for feed grains. Beef and pork production rose respectively by 4.1 and 5.3 percent in 1999.   In addition the goat poultry and rabbit increased production in 1999, For 2000, additional increases of about 2 percent for pork and 5 percent for beef are expected. In the long term a large portion of increases in beef and pork will be produced mainly to supply export markets. Spain increased imports of animals for feeding purposes and increased again the exports of fed animals and meat. The new subsidies for beef and lower intervention prices for grains, both established in the Agenda 2000, are positively impacting the Spanish livestock sector. The use of growth promotants in beef production continues.

In the first six months of 2000, the prices for pork and beef have been profitable. However, after the summer, tourisism season, prices are expected to fall. Producers hope to increase exports to other EU countries.

As a result of the increase in demand for pork and beef, demand for lamb meat has been declining in the last few years. The sheep sector has been adversely affected by low prices. As aresult, sheep producers are shifting to beef and extensive pork production.

Given all the EU impediments to U.S. meat exports, opportunities for U..S. exporters are severely limited. Nonetheless, U.S. trachea for pharmaceutical uses and tripe for human consumption have a niche market in Spain..

Despite the strength of the dollar, in 1999 hides and bovine leather imports from the U.S. totaled about 13,000 tons. During the last six years, exports of footwear have risen 52 percent, and shipments of total leather products, including footwear, amounted to about $2.3 billion in 1999. To supply the Spanish leather industry, stable exports of U.S. hides to Spain are expected for the years 2001 and 2002.

Exchange Rate: $1= 174 pesetas

Feed Demand: Strategic Indicator Table

FEED DEMAND STRATEGIC INDICATOR TABLE FOR SPAIN				
MEAT PRODUCTION (in Metric Tons)				
		Last Year	Current Year	Forecast
Calendar Year:	**1998**	**1999**	**2000**	**2001**
Poultry				
Poultry Meat:	998,811	1,001,550	1,002,000	1,005,000
Eggs (Million pieces):	9,084	9,400	9,200	9,300
Pork:	2,667,000	2,892,000	2,963,000	3,005,000
Beef & Veal:	633,000	677,000	712,000	747,000
Lamb and Goat:	247,000	235,000	232,000	230,000
Rabbit and Horse:	135,560	141,839	142,000	143,000
COMPOUND FEED SECTOR (Million MT)				
Compound Feed Capacity	30.0	30.5	31.0	31.5
Total Compound Feed Produced	23.5	24.0	24.0	24.1
------ by integrated producers	9.0	9.3	9.3	9.3
------ by commercial producers	7.0	7.1	7.1	7.2
------ others	7.5	7.6	7.6	7.6
FEED GRAIN USE (1,000 MT)				
Marketing Year:	1998	1999	2000	2001
Corn (Domestic consumption: feed)	6,157	5,557	5,100	5,100
Other (specify): Wheat	3,866	4,197	4,700	4,700
Barley	8,802	7,634	8,600	8,500
Oats	700	525	700	700
Sorghum	350	350	350	350
Rye, Triticale, mixes	255	265	280	270
Total	20,130	18,528	19,730	19,620
Alfalfa (artificially dehydrated)	1,500	1,635	1,650	1,660
Corn Gluten, Brewers grain and citrus pulp	1,100	1,000	950	1,000
Peas	594	542	544	550
Tallow and Grease	281	254	285	290

PROTEIN - ENERGY USAGE (1,000 MT)				
Total Protein Meal	5,349	5,180	5,404	5,420
Soy Bean Meal (feed waste domestic consumption)	4,472	4,300	4,530	4,550
Other Protein Meal	787	768	774	770
Fish Meal	90	112	100	100
Palm Crude Oil (feed waste domestic consumption)	45	46	47	47
TRADE (1,000 Metric Tonnes) (Calendar Year)				
Corn				
Imports:	2,855	2,952	2,900	3,000
Exports:	113	88	100	100
Soy Beans				
Imports:	3,196	2,660	2,800	2,800
Exports:	4	2	2	2
Soy Bean Meal				
Imports:	2,059	2,503	2,500	2,550
Exports:	181	135	150	150
Fish Meal				
Imports:	63	87	80	70
Exports:	22	33	20	20
Palm Crude Oil				
Imports:	46	46	47	47

TARIFFS AND TAXES		Bound Rate	Applied Rate	Other
Report Year: 2000	Product	(%)	(%)	Import
Code	Description	Current	Current	Taxes/Fees
505.9	FEATHER MEAL	0.30	0.30	-
1518.00.95	YELLOW GREASE	2.00	2.00	-
1502.00.00.40	INEDIBLE TALLOW	3.50	3.50	-
1511	PALM OIL	4.20	4.20	-
1518	ANML/VG FTS &OILS	2.00	2.00	-
2301.1	MEAT AND BONE MEAL	Free	Free	-
2301.20	FISH MEAL	Free	Free	-

CATTLE NUMBERS

PSD Table						
Country	Spain					
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	5966	5966	6150	6204	0	6350
Dairy Cows Beg. Stocks	1308	1308	1330	1236	0	1235
Beef Cows Beg. Stocks	1640	1640	1760	1811	0	1900
Production (Calf Crop)	2270	2356	2290	2425	0	2495
Intra EC Imports	750	641	750	650	0	650
Other Imports	5	4	5	4	0	4
TOTAL Imports	755	645	755	654	0	654
TOTAL SUPPLY	8991	8967	9195	9283	0	9499
Intra EC Exports	150	126	160	158	0	160
Other Exports	1	0	1	1	0	1
TOTAL Exports	151	126	161	159	0	161
Cow Slaughter	630	625	640	630	0	650
Calf Slaughter	1530	1483	1590	1603	0	1686
Other Slaughter	480	480	500	490	0	520
Total Slaughter	2640	2588	2730	2723	0	2856
Loss	50	50	50	51	0	52
Ending Inventories	6150	6204	6254	6350	0	6430
TOTAL DISTRIBUTION	8991	8968	9195	9283	0	9499
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Production

The 2000 forecasts for inventory numbers have been revised to reflect the Ministry of Agriculture's most recent data. These numbers indicate an increase of about 4 percent in both total cattle numbers and calf production. Generous EU payments for both calves and beef cows, combined with relatively good beef prices, continue to provide producers with the incentive to increase beef cow numbers. For the next few years increases in stocks are expected. During the last few years, prices have been profitable for most ranchers and feeders. For efficient producers production could be viable even without EU payments. On average, 45 percent of total income in Spain’s livestock sector are the result of EU subsidies. Abundant rains in most of Spain during April and May have resulted in excellent pasture conditions. The feeding costs have declined about 10 percent due to a grain crop 4 million tons larger than in 1999 and a record crop of dried forage (mainly alfalfa)

Despite of an increase in Spain's dairy quota of 550,000 tons, the census of dairy cows could remain stable as a result of higher yield in milk production. Production of milk over the quota is heavily penalized.

Low lamb meat prices in the last two years have encouraged shifting from sheep production to beef cows. In addition, due to socioeconomic reasons it is difficult to find shepards for sheep flocks. Under these conditions over the next few years a lower sheep census is expected.

The table below outlines EU subsidies for the year 2000 and 2001. The subsidy/animal is reported in pesetas.

		Year 2000	Year 2001
	Quota	Subsidy/Animal Pts	Subsidy/Animal Pts
Beef Cows (The quota has been allocated to farmers)	1,441,539	27,121	30,282
National payment (The quota has been allocated to farmers)	1,441,539	4,018	4,018
Payment for farms with less than a 1.4 animals/hectare	1,441,539	16,638	16,638
Bulls* (The quota for bulls is not allocated to farmers)	713,999	26,621	30,781
Bulls: Payment for farms with less than a 1.4 cows/hectare	713,999	16,638	16,638
Steers* (The quota for bulls is not allocated to farmers)	2,300	18,086	24,958
Slaughter Premium (Beef)* (This quota is not allocated to farmers)	1,982,216	4,492	8,818
Slaughter Premium (Veal) (This quota is not allocated to farmers)	25,629	2,828	5,490

*In addition, beef producers in Spain are eligible for an additional "complementary" aid of 1.8 billion pesetas for the year 2000 and 3.6 billion pesetas for the year 2001.

Increased imports of live young animals has resulted in a larger number of young bulls that were entitled to the payment. Consequently, the direct payment per young bull has been reduced by 39 percent in 1999. For the next few years, similar penalties are expected.

In the Agenda 2000, the young bull quota was increased by 110,325 head. This increase will avoid a further reduction in the payments for young bulls.

All Spanish bovines are identified with two ear tags. Each tag contains sufficient information to identify the farm of origin. When animals are transported, a transport certificate is mandatory. The certificates reflect the numbers of the tags of all animals transported in the truck. Record books are mandatory for farms and slaughterhouses, which provide information about the animals produced on the farm during the last few years.

Trade

Import Trade Matrix	
Country	Spain
Commodity	Animal Numbers, Cattle
Imports for:	1999
U.S.	0
Others	
EU Countries	641214
Poland	2609
Romania	373
Total for Others	644196
Others not Listed	812
Grand Total	645008

Export Trade Matrix	
Country	Spain
Commodity	Animal Numbers, Cattle
Exports for:	1999
U.S.	0
Others	
EU Countries	125578
Total for Others	125578
Others not Listed	227
Grand Total	125805

Cattle imports rose in again in 1999. Spain will need to increase imports of live animal in the next few years to meet demand for beef from both EU and non EU countries. Most of the imports are feeder calves from France, Ireland, and Germany. Imports from Portugal remain banned due to the BSE situation there. Due to good prices for fed animals in EU countries, exports of live cattle are expected to rise in the next few years. Most are fed animals for slaughtering . Almost all of Spain's cattle exports go to other EU countries, primarily Italy. Spain is increasing its role as feeding country in the EU.

Prices Table			
Country	Spain		
Commodity	Animal Numbers, Cattle		
Prices in	Pesetas	per KG of fed live cattle	
Year	1988	1989	% Change
Jan	298	298	0.00%
Feb	300	293	-2.33%
Mar	286	287	0.35%
Apr	283	287	1.41%
May	284	284	0.00%
Jun	278	273	-1.80%
Jul	275	273	-0.73%
Aug	284	278	-2.11%
Sep	290	280	-3.45%
Oct	284	283	-0.35%
Nov	286	292	2.10%
Dec	288	298	3.47%
Exchange Rate	174	Local currency/US $	

BEEF

PSD Table						
Country	Spain					
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)	2640	2588	2730	2723	0	2856
Beginning Stocks	30	30	0	0	0	0
Production	670	677	692	712	0	747
Intra EC Imports	40	53	45	53	0	45
Other Imports	10	16	10	15	0	15
TOTAL Imports	50	69	55	68	0	60
TOTAL SUPPLY	750	776	747	780	0	807
Intra EC Exports	115	108	115	110	0	135
Other Exports	20	25	15	25	0	25
TOTAL Exports	135	133	130	135	0	160
Human Dom. Consumption	605	633	607	635	0	637
Other Use, Losses	10	10	10	10	0	10
TOTAL Dom. Consumption	615	643	617	645	0	647
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	750	776	747	780	0	807
Calendar Yr. Imp. from U.S.	3	0	3	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Production

Higher direct payments and profitable prices for beef in domestic market and in other EU countries are encouraging domestic production. For the year 2000/2001, lower prices for grain and hay are expected to result in lower costs. Consistent with expectations, imports of feeding cattle and the slaughter numbers will rise again in next few year. In 1999, the carcass weight rose to about 262 kilogram, up 2.3 percent compared to1998. Wet weather in most of Spain during April and May of this year has resulted in good pasture. The current pasture conditions will have a favorable impact on production cost and the calf crop in 2001.

Hormones are widely used in Spain, despite the fact that Spain’s authorities continue to prosecute individuals involved with the distribution, sale, and use of hormones. Clenbuterol remains as the most popular drug.

On October 1, 2000, Spain will implement the EU decision on SRM ban. The measure will obligate slaughterhouses as well as cutting plants to remove and destroy the skull, including the brains and eyes, the tonsils, the spinal cord and the ileum of cattle above 12 months. Both domestic and imported cattle are affected by this measure. In addition, in cattle imported from the U.K and Portugal the entire head (excluding the tongue), the thymus, the spleen, the intestines and the spinal cord of cattle above 6 months must be removed. In the last few years, imports of live cattle from Portugal and the U.K. have been minimal. The meat sector has reacted very negatively to the decision, claiming that: 1) they didn't yet possess the technical capability to meet the new requirements; 2) removing the tissue required would mean that valuable cuts would be destroyed; 3) the new EU decision on SRM is not viewed in Spain as being sensible because no outbreak of BSE has been reported; 4) the Decision will increase costs in the meat plants.

Consumption

The Spanish consumers pay less attention today than years ago to the widely publicized cases of illegal hormone usage. The continued good performance of the economy and continued growth in the number of tourists visiting Spain each year are factors driving the growing demand for beef. In addition, possibly because Spain still has no reported cases of BSE, the image of beef has not been damaged to the extent that it has in other European countries. For the year 2001 a higher consumption is expected. The general feeling among consumers is that Spain is a free country of BSE, if an outbreak is reported, the Spanish beef consumption could declined dramatically.

Trade

Spain's trade in beef is expected to remain very active in 2000. In 1999, exports of beef rose by 12 percent. Spain is a major importer of live animals for feeding purposes and a major exporter of beef and fed cattle for slaughtering. Taking into account the trend of the last few years, Spain in going to be a net exporter of beef, including imports/exports of live cattle, in the next few years. Most of the trade occurs with other European countries. Spain's imports from the U.S. of beef and beef products were minimal in 1999. Spain has a large potential to import beef from the U.S. if non tariff trade barriers are removed. In 1999, fueled by EU exports subsidies, Spanish exports to Russia rose dramatically. According to trade sources, the same trend is expected for the next few years. Most of beef from non EU countries was imported by the Canary Islands. Imports of beef from non EU countries are expected to remain stable or to decline marginally. Imports from EU countries could decline due to larger domestic production.

Import Trade Matrix	
Country	Spain
Commodity	Meat, Beef and Veal
Imports for:	1999
	Full
U.S.	17
Others	
EU Countries	52743
Brasil	11377
Uruguay	2629
Argentina	1262
New Zealand	320
Paraguay	283
Total for Others	68614
Others not Listed	117
Grand Total	68748

Export Trade Matrix	
Country	Spain
Commodity	Meat, Beef and Veal
Exports for:	1999
	Full
U.S.	0
Others	
EU Countries	107594
Russia	20051
Saudi Arabia	1732
Bulgaria	1927
Andorra	335
Total for Others	131639
Others not Listed	1071
Grand Total	132710

SWINE NUMBERS

PSD Table						
Country	Spain					
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	21715	21715	21900	22597	0	22700
Sow Beginning Stocks	2020	2020	2024	2030	0	2060
Production (Pig Crop)	35600	36360	35670	36540	0	37080
Intra EC Imports	800	1526	800	1500	0	1500
Other Imports	2	8	2	8	0	8
TOTAL Imports	802	1534	802	1508	0	1508
TOTAL SUPPLY	58117	59609	58372	60645	0	61288
Intra EC Exports	700	942	700	1000	0	1000
Other Exports	0	0	0	0	0	0
TOTAL Exports	700	942	700	1000	0	1000
Sow Slaughter	800	810	800	810	0	810
OTHER SLAUGHTER	34317	34860	34572	35736	0	36260
Total Slaughter	35117	35670	35372	36546	0	37070
Loss	400	400	400	400	0	410
Ending Inventories	21900	22597	21900	22700	0	22800
TOTAL DISTRIBUTION	58117	59609	58372	60646	0	61280
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Production

During the period 1990/1999, the Spanish swine sector increased pork production by more than 1 million tons. In 1999, despite the crisis, with prices well below production costs in most of year, the Spanish swine sector increased hog numbers and production. The PS&D has been updated to reflect the most recent official statistics and the forecast for 2001 reflects expectations for further growth. The industry consensus is that the average number of pigs per sow per year is now around 18.

In June 2000 prices are about 200 pesetas per kilogram of live animal, this is about 65 pesetas higher than the break even point. Prices for feed grains are lower than in 1999. These two factors could result in a larger production in 2001. For the next three months profitable prices are expected due to higher demand from tourists. Prices are expected to decline at the end of September as a result of a lower demand of pork from tourists.

In addition the extensive pork production sector (Iberian swine) have remained very profitable during the last few years. Depending on quality, live animal prices were ranging between 400 pesetas ($2.30) and 240 pesetas

($1.40) per kilogram of live animal during the last two years. The good prices have increased to a near doubling of the number of Iberian hogs in the last two years to about 1.8 million head in December 1999. For the year 2000, the forecast indicates an ending stock of Iberian swine of about 2.3 million head. The meat of this native breed is used to make high quality pork products. The main products is the Iberian ham; in addition other Iberian pork products like sausages, salami and other are very much appreciated. These pork products are used mainly in domestic market.

Most of the investments in the swine sector are domestic. According to trade sources, investments by domestic companies totaled more than 95 percent of total investments within the last five years. In addition, some investments from Holland swine companies have been reported.

Hog producers remain optimistic about the long-term prospects for the sector, believing that production will be increasingly transferred from northern Europe to mainland Spain, as they feel they have a comparative advantage in hog production. Due to the dry weather and the relative large area, swine producers do not face the same environmental constraints as their northern European neighbors. In addition, Spain has better production conditions during most of the year and lower labor costs. Furthermore, producers feel that with a generous supply of labor and greater land area, Spain will be in a better position to adapt to any animal welfare regulations that EU may implement.

Spanish swine producers are complaining about the new EU regulations on anti- microbial and the use of antibiotics as growth promoutants because of these new regulations have been put in force without scientific basis. According to production sources, the antibiotic and anti-microbials banned have been replaced by other antibiotics and anti-microbials approved in the EU.

Prices Table			
Country	Spain		
Commodity	Animal Numbers, Swine		
Prices in	Pesetas	per	Kilogram
Year	1998	1999	% Change
Jan	169	103	-39.05%
Feb	182	116	-36.26%
Mar	176	122	-30.68%
Apr	170	127	-25.29%
May	168	139	-17.26%
Jun	174	171	-1.72%
Jul	162	169	4.32%
Aug	153	161	5.23%
Sep	125	151	20.80%
Oct	103	128	24.27%
Nov	90	120	33.33%
Dec	113	128	13.27%
Exchange Rate	174	Local currency/US $	

Trade

Spanish imports of live animals rose due to a higher demand for feeder pigs. Spainish imports are primarily 20 kg feeder pigs from Holland, France, and Germany.

Due to lower prices in Spain than in other EU countries exports rose dramatically by 64 percent in 1999. For the year 2000, new increases in exports are expected. Spain export fed animals for slaughtering purposes.

Import Trade Matrix	
Country	Spain
Commodity	Animal Numbers, Swine
Imports for:	1999
	Full
U.S.	
Others	
Holland	897455
Germany	334500
France	184000
Hungary	7488
Check Republic	480
Total for Others	1423923
Others not Listed	102077
Grand Total	1526000

Export Trade Matrix	
Country	Spain
Commodity	Animal Numbers, Swine
Exports for:	1999
	Full
U.S.	
Others	
EU Countries	941884
Total for Others	941884
Others not Listed	87
Grand Total	941971

PORK

PSD Table						
Country	Spain					
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)	35117	35670	400	36546	0	37070
Beginning Stocks	133	133	180	180	0	180
Production	2802	2892	2822	2963	0	3005
Intra EC Imports	78	65	60	55	0	50
Other Imports	13	17	10	17	0	17
TOTAL Imports	91	82	70	72	0	67
TOTAL SUPPLY	3026	3107	3072	3215	0	3252
Intra EC Exports	280	346	350	426	0	447
Other Exports	60	39	75	45	0	50
TOTAL Exports	340	385	425	471	0	497
Human Dom. Consumption	2501	2502	2505	2520	0	2530
Other Use, Losses	5	10	5	14	0	15
TOTAL Dom. Consumption	2506	2512	2510	2534	0	2545
Ending Stocks	180	210	137	210	0	210
TOTAL DISTRIBUTION	3026	3107	3072	3215	0	3252
Calendar Yr. Imp. from U.S.	1	1	0	0	0	0
Calendar Yr. Exp. to U.S.	1	1	0	0	0	0

Production

With the expected increase in hog numbers and slaughter, pork production is forecast to increase again in 2000. The carcass weight rose from 80.1 kg in 1998 to 81.1kg in 1999.

The prices for cured Iberian hams are ranging between 3,000 pesetas ($17.2) and 4,500 pesetas ($25.8) per kilogram in comparison with the price of about 1,200 pesetas per kilogram paid for a regular cured Serrano ham. Most of Iberian hams are used in the domestic market, mainly in restaurants. During the last two years the demand of these hams from domestic market was higher than the supply. The high price paid for Iberian cured products, mainly hams, encouraged the production of Iberian and pseudo Iberian swine.

New meat plants have been built during 1999. The capacity of cured ham plants was increased by more than 2.5 million pieces in 1999. For the next few years new slaughterhouses and curing plants will be in production. The Spanish capacity to produce hams is over 40 million pieces a year. Most stocks of pork are hams in the curing process. On average, the stock of hams is equivalent to 210,000 tons of pork.

Consumption and stocks

Taking into account higher current prices for pork and large increases in consumption during the last few years, the forecast indicates a stable consumption in 2000 and 2001. Encouraged by the low prices of fresh hams at the end of 1999, Serrano ham plants increased stocks. These hams will be in the market after September 2000. For 2000, the Spanish production of hams could total 40 million of pieces, equivalent to 440,000 tons of fresh products. Stocks of frozen pork are minimal as of June 25, 2000.

The consumption of cured pork products remains stable.

Trade

Given expectations for the growth in domestic production and the availability of stocks, total pork imports are forecast to decline in 2000 and 2001. Imports from Hungary rose dramatically, in 2000, almost all of Spain's pork imports from Hungary, are imported under the EU's WTO reduced-duty import commitment.

Exports are forecast to grow in the next few years encouraged by increases in Spanish production. Most of the increases in Spanish pork production are going to be exported..

Import Trade Matrix	
Country	Spain
Commodity	Meat, Swine
Import	1999
	Full
U.S.	
Others	
EU Countries	64510
Hungary	16882
Total for Others	81392
Others not Listed	15
Grand Total	81407

Export Trade Matrix	
Country	Spain
Commodity	Meat, Swine
Exports for:	1999
	Full
U.S.	
Others	
EU Countries	346006
Russia	35916
Total for Others	381922
Others not Listed	3410
Grand Total	385332