

# Global trade comparisons

## Top 20 countries buying U.S. beef products (exports)

Rank	Country	2011 Beef and variety meat (in metric tons)	Percent change from 2010	Rank	2011 Beef and variety meat value (in thousands of dollars)	Percent change from 2010
1	Mexico	296,938	+4.0%	2	\$985,272	+20.0%
2	Canada	191,047	+25.0%	1	\$1,032,004	+41.0%
3	Japan	158,646	+27.0%	3	\$874,420	+37.0%
4	Korea, Republic of	154,019	+37.0%	4	\$686,006	+32.0%
5	Egypt	147,883	+30.0%	8	\$236,120	+33.0%
6	Russia	72,797	+27.0%	5	\$255,597	+68.0%
7	Hong Kong	50,705	+27.0%	7	\$237,090	+50.0%
8	Vietnam	44,543	+3.0%	10	\$191,985	+17.0%
9	Taiwan	35,603	-9.0%	9	\$199,763	-8.0%
10	European Union(*)	32,647	+31.0%	6	\$243,543	+60.0%
11	Indonesia	17,847	+34.0%	18	\$28,221	+12.0%
12	Netherlands	16,220	+13.0%	11	\$126,591	+48.0%
13	Philippines	12,760	+17.0%	14	\$38,064	+30.0%
14	Peru	10,922	+74.0%	21	\$20,063	+79.0%
15	United Arab Emirates	8,146	+28.0%	13	\$38,824	+40.0%
16	Jamaica	7,471	+14.0%	22	\$16,894	+13.0%
17	Saudi Arabia	6,628	+6.0%	15	\$31,564	+40.0%
18	Italy	6,469	+53.0%	12	\$63,034	+100.0%
19	Germany	6,089	+93.0%	16	\$29,266	+90.0%
20	Dominican Republic	4,465	+12.0%	17	\$28,832	+28.0%
<b>Total all countries</b>		<b>1,287,259</b>	<b>+21.0%</b>		<b>\$5,420,723</b>	<b>+33.0%</b>

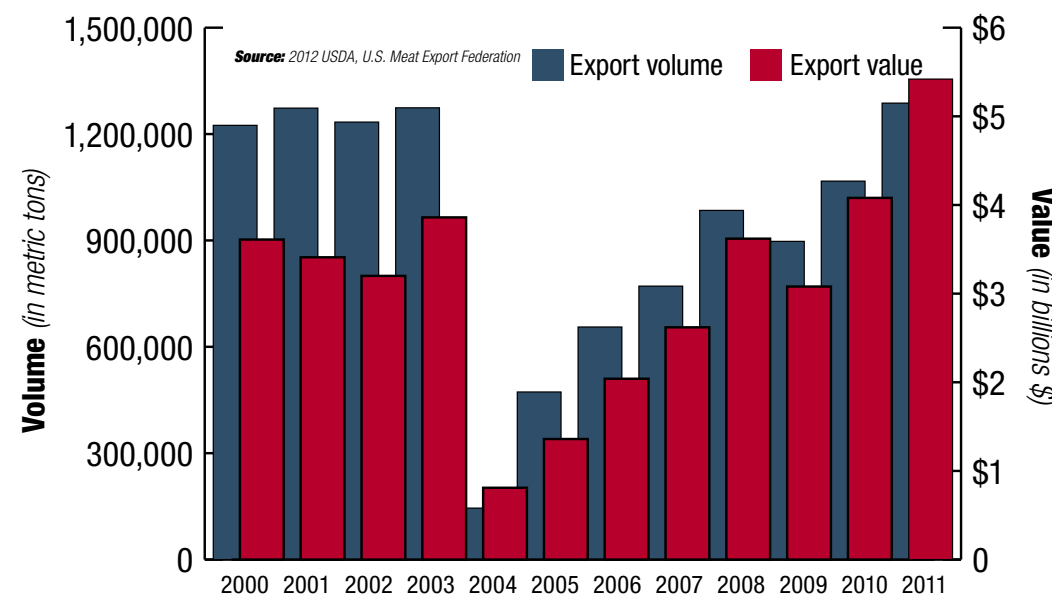
Source: 2012 USDA, U.S. Meat Export Federation  
 (\*) denotes a country that is a summation of its component countries.  
 Editor's note: A list graphic for top nations that export beef, showing rank for beef & veal exports, total value in 2011, and % change from 2010. A secondary ranking can be used for the export leaders of beef variety meats with accommodating ranking.

## Top 10 countries shipping beef products to the U.S. (imports)

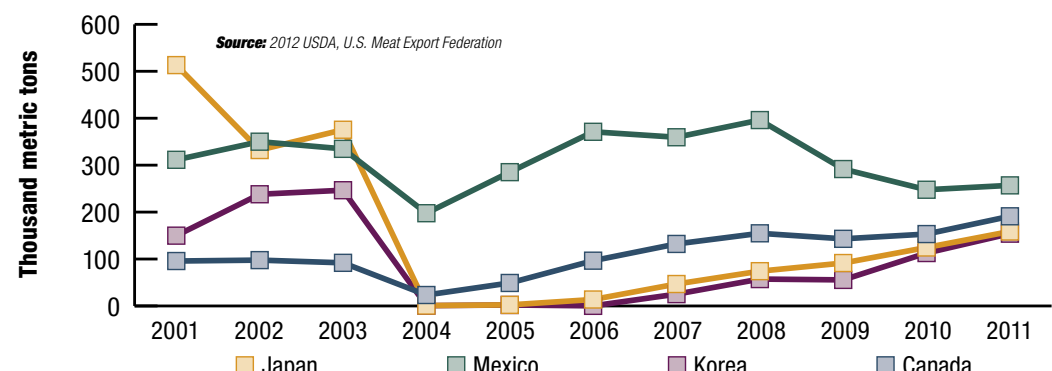
Rank	Country	2011 Beef and variety meat (in metric tons)	Percent change from 2010	Rank	2011 Beef and variety meat value (in thousands of dollars)	Percent change from 2010
1	Canada	235,594	-20.4%	1	\$892,336	-6.1%
2	New Zealand(*)	151,541	-3.3%	3	\$689,185	+21.1%
3	Australia(*)	150,524	-20.3%	2	\$721,867	-1.1%
4	Mexico	58,213	+46.6%	4	\$322,626	+49.9%
5	Nicaragua	41,912	+25.5%	5	\$162,384	+56.9%
6	Uruguay	15,781	-8.5%	7	\$106,008	+33.2%
7	Brazil	10,837	-28.1%	6	\$145,946	+71.6%
8	Argentina	10,266	-2.4%	8	\$66,281	+12.0%
9	Costa Rica	6,564	-16.7%	9	\$25,779	+0.4%
10	Honduras	6,132	+307.6%	10	\$24,614	+415.9%
<b>Total all countries</b>		<b>688,413</b>	<b>-10.4%</b>		<b>\$3,164,430</b>	<b>+11.7%</b>

Source: 2012 Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics  
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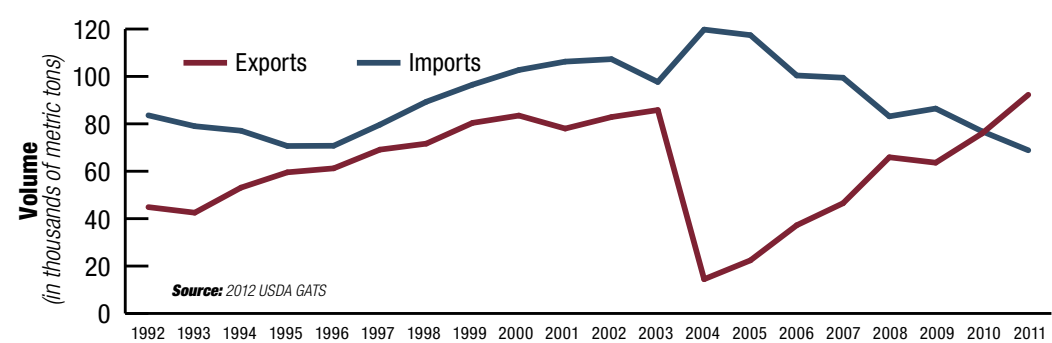
## U.S. beef products export volume and value



## U.S. beef exports to select markets

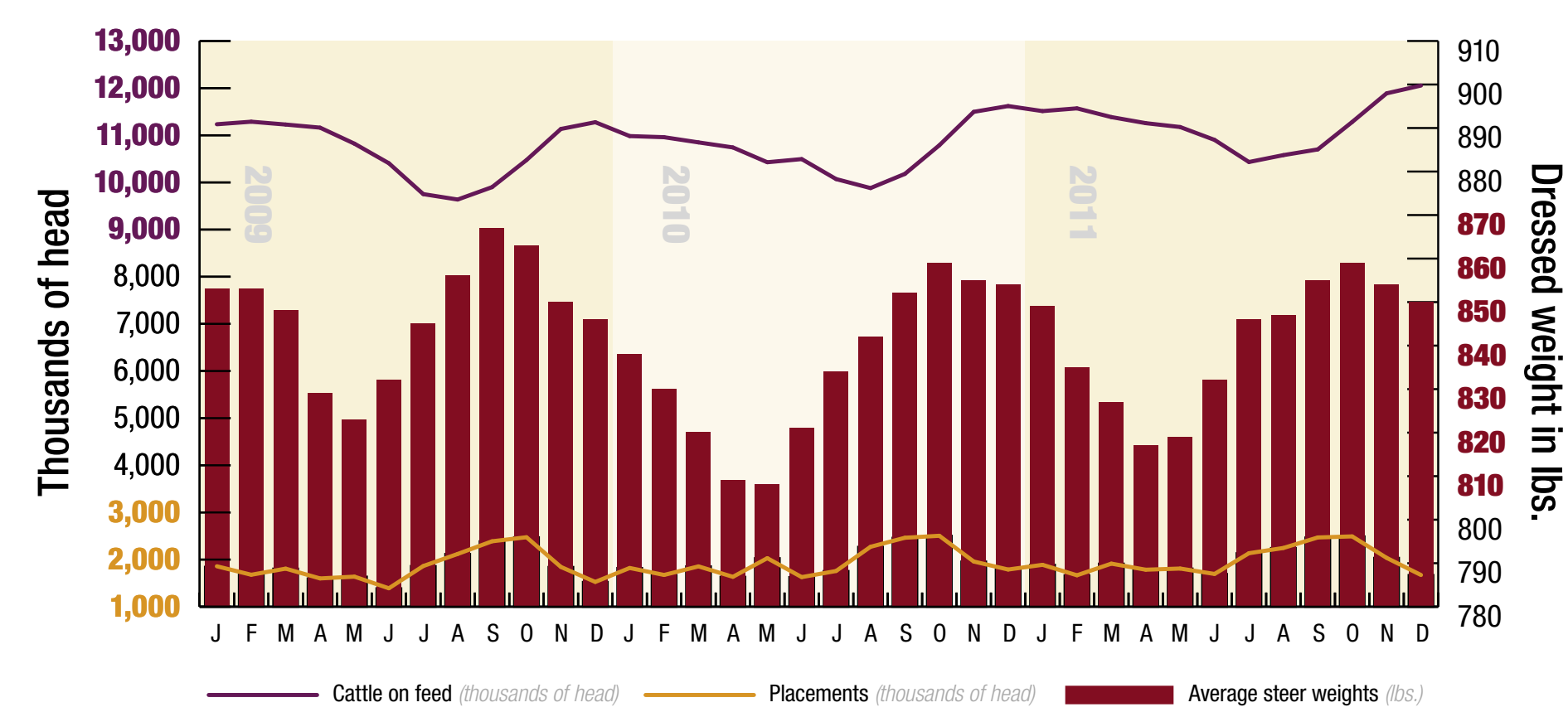


## U.S. beef and veal annual trade

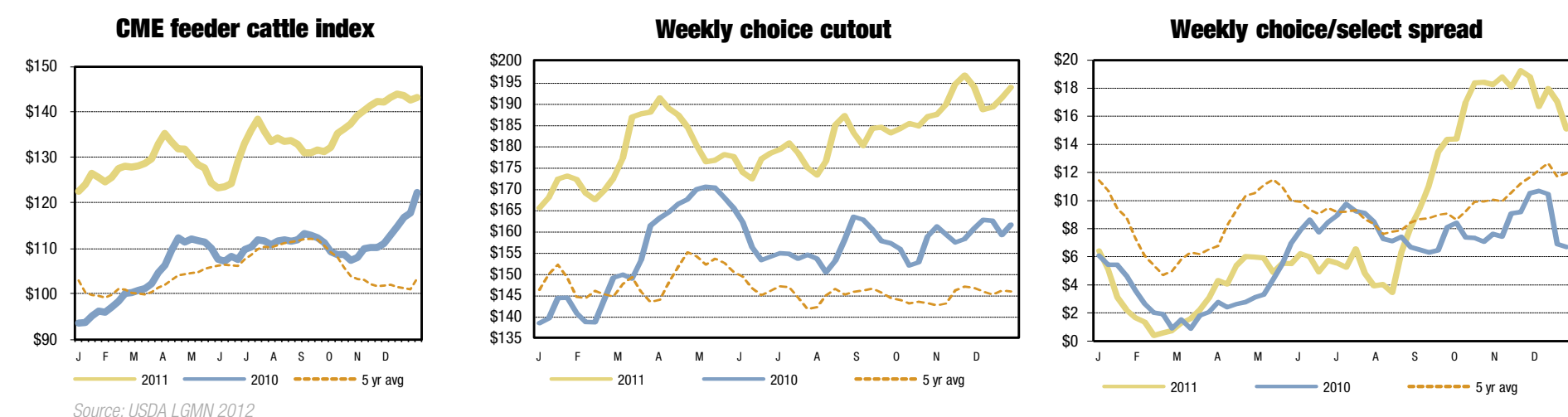


# Market placements and prices

## 2009-2011: Monthly cattle on feed, placements and weights



## Cattle price indexes and spreads



# National herd takes drastic hit from 2011 drought

Progressive Cattleman Editor David Cooper

The drought of 2011 inflicted some major cuts in the national beef herd, bringing the U.S. beef cow total to 29.9 million head, its lowest tally since the early 1960s, and a 3.1 percent drop from 2010. Extreme drought conditions in the summer scorched the Southwest, bringing a selloff of beef herds in the heart of cattle country. With pasture and forage supplies parched in the region's worst dry stretch in generations, Oklahoma's beef cow total took a 14 percent dive, followed by Texas and New Mexico with their own double-digit decreases.

Some of those cows were shipped north, as proven by increased beef cow numbers in Nebraska, Colorado, Iowa, Wyoming and Idaho. The Cornhusker state's beef cow herd jumped 6.3 percent, lifting it to second-largest herd in the nation both for beef herd cows and cattle on feed. Kansas became the third-largest state with beef cow numbers while Oklahoma fell to fourth.

Overall cattle/calf inventory figures also saw a drop for the fifth consecutive year with a Jan. 1 count of

90.8 million head, or 2.2 percent less than 2011, while the number of cattle operations in the U.S. also dropped 1.3 percent to 922,000 operations.

### Global trade

Beef production declines in other corners of the livestock world forced buyers back to U.S. cattle in 2011, as the nation's export values soared to unprecedented levels.

For the first time in decades, U.S. exports of beef and veal outpaced imports, as the export level hit 922,683 metric tons of beef and veal. That led to a value record of \$5.42 billion, a 32 percent increase over 2010 exports.

Several key markets surged over 2011. Mexico's volume led all partners, while Canada's beef and variety meat purchases brought in over \$1 billion by itself — a 41 percent increase for that country over 2010. Russia, Korea, Egypt, Japan and Hong Kong also saw U.S. beef volumes jump between 25 and 37 percent in 2011.

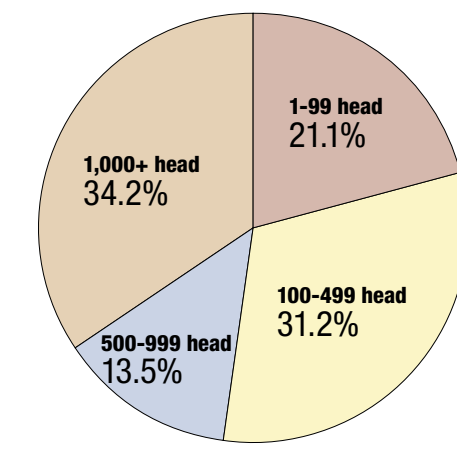
Beef continued to stage a slow recovery from the 2003 BSE crisis, with volume indexes to the four key

export nations of Japan, Mexico, South Korea and Canada continuing to climb above 2010 figures. Shipments to Japan jumped to 158,646 metric tons, although still not half of where volume was to that nation in 2003. Korean exports jumped to 154,019 metric tons, an increase of 36 percent over the previous year, but also below pre-BSE levels. Canada was the only country of the four nations that has surpassed import levels of U.S. beef compared to 2003, with 191,047 metric tons brought in during 2011.

### Placements and prices

The CME feeder cattle index in 2011 surged high through much of 2011, easily outpacing the strong prices seen in 2010, and even ending the year on a high note at around \$142 per hundredweight. In late summer the choice-select spread began to widen as a major retailer expanded its offerings of choice beef in the meat aisle. Cattle-on-feed numbers also jumped over 2010 figures during the fall run, thanks in large part to drought-stricken states sending more cattle to the feedyards.

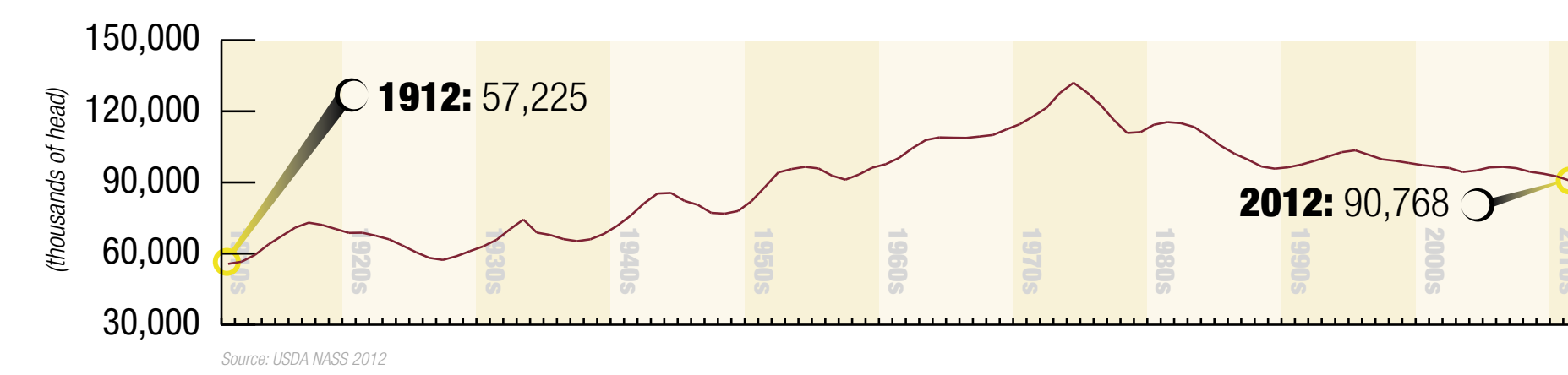
## U.S. cattle inventory by operation size



### Regional production

The West region was the only one to see an increase in its calf crop, while both the West and South-Central regions hit Jan. 1 with increases in cattle on feed. For total cattle/calf inventories, the East, West and North-Central regions saw small increases in total head of cattle.

## 100-year history: U.S. cattle & calves inventory



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Collect the data. Analyze the numbers. Take decisive action.

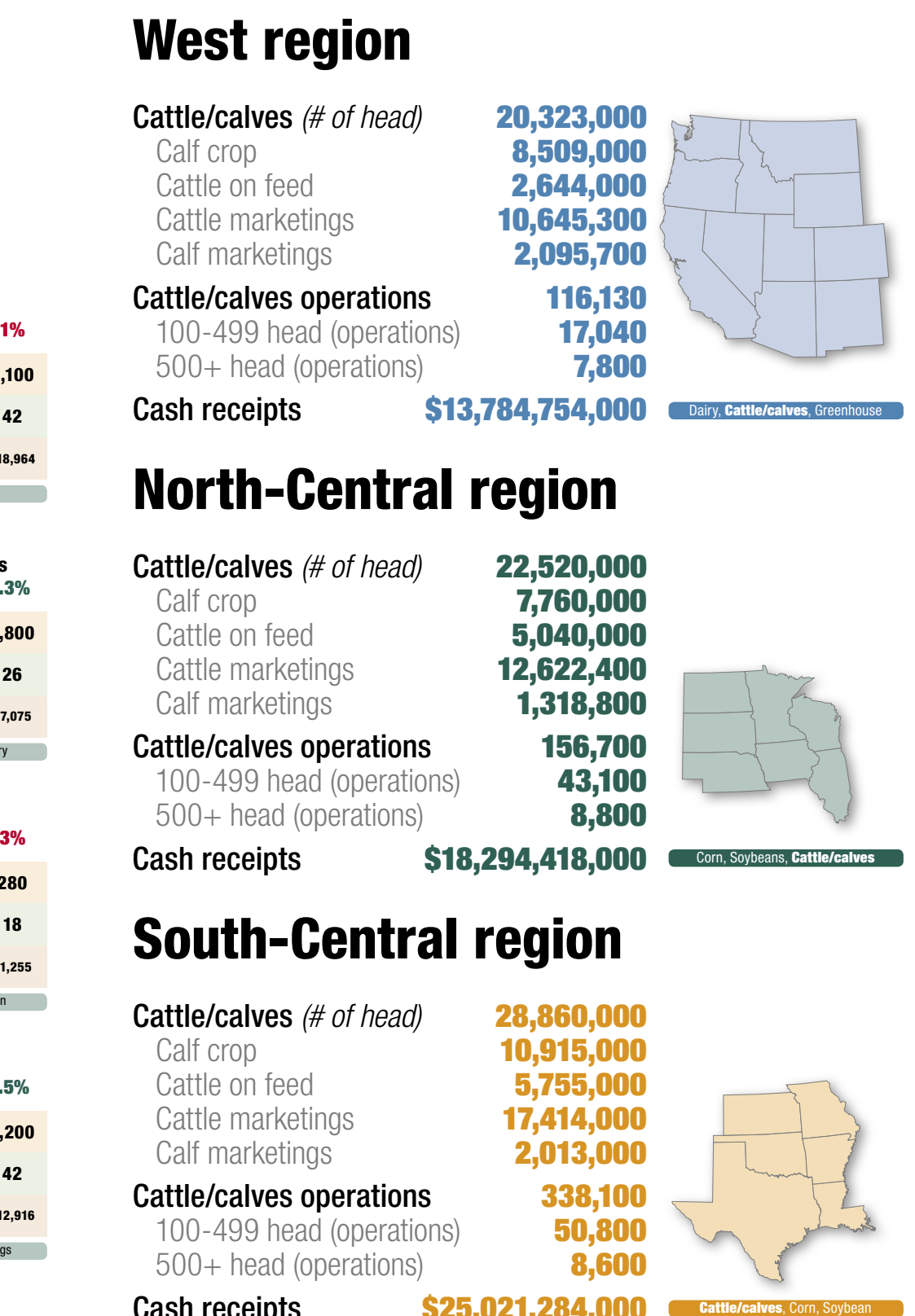
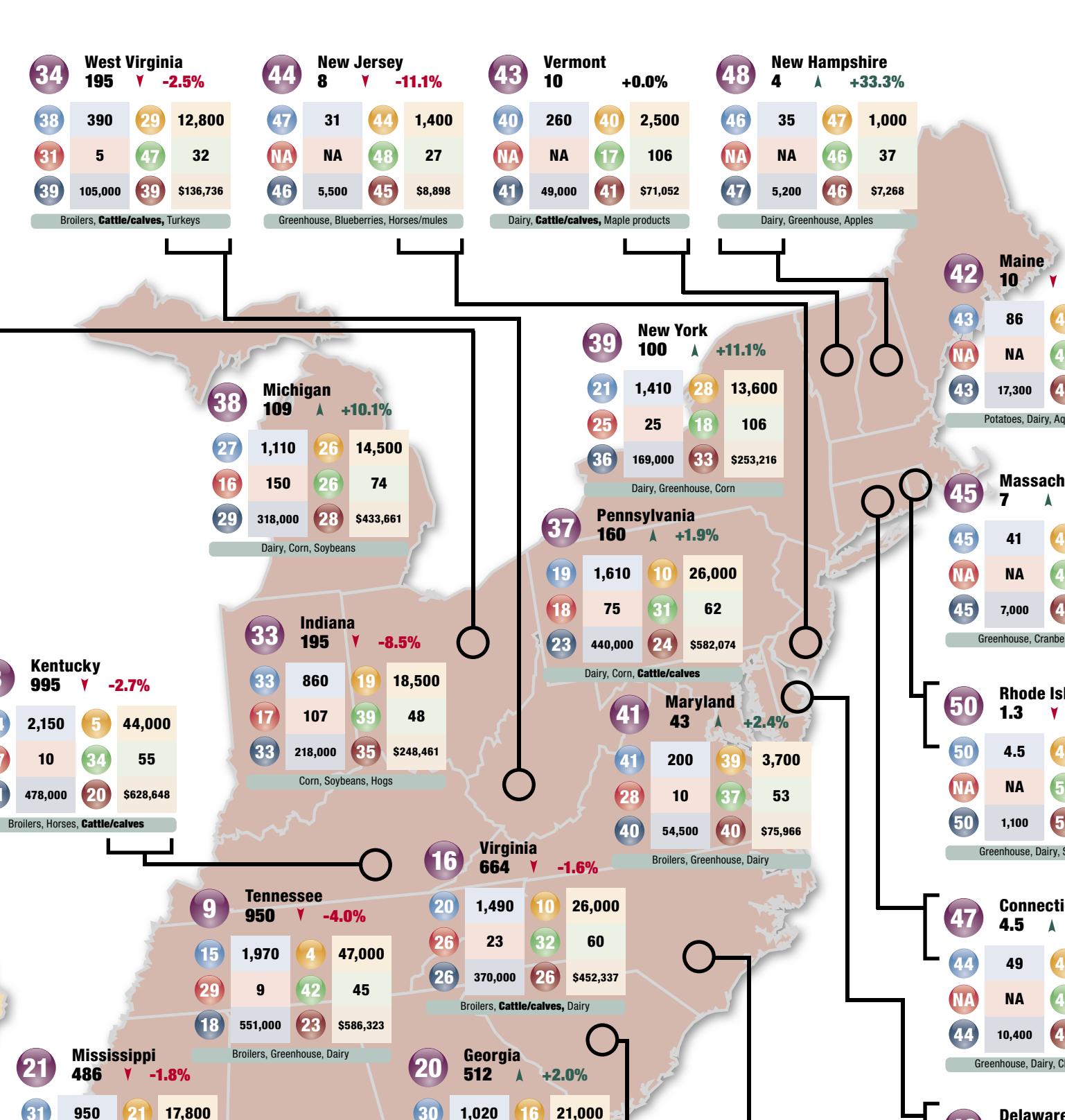
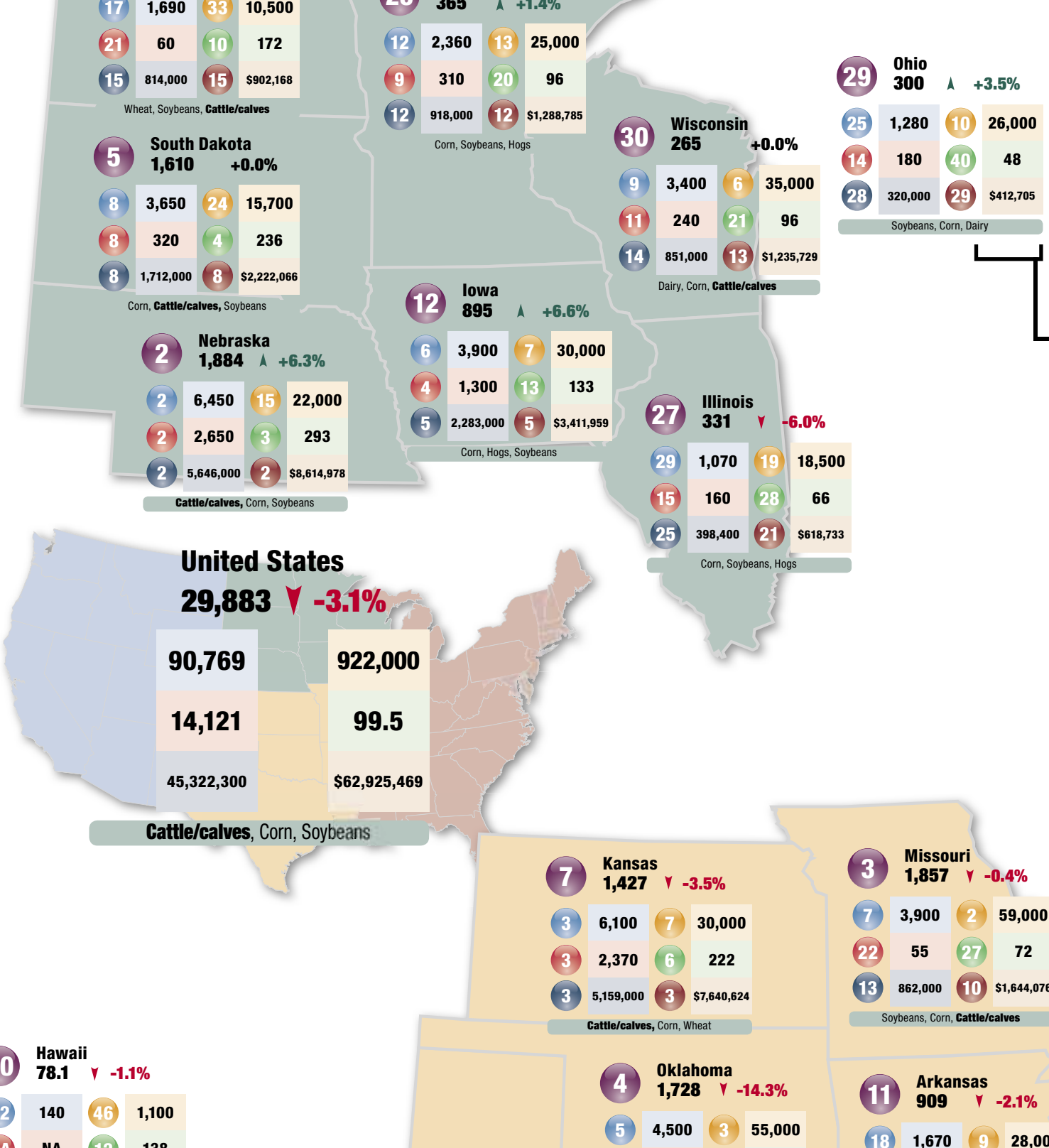
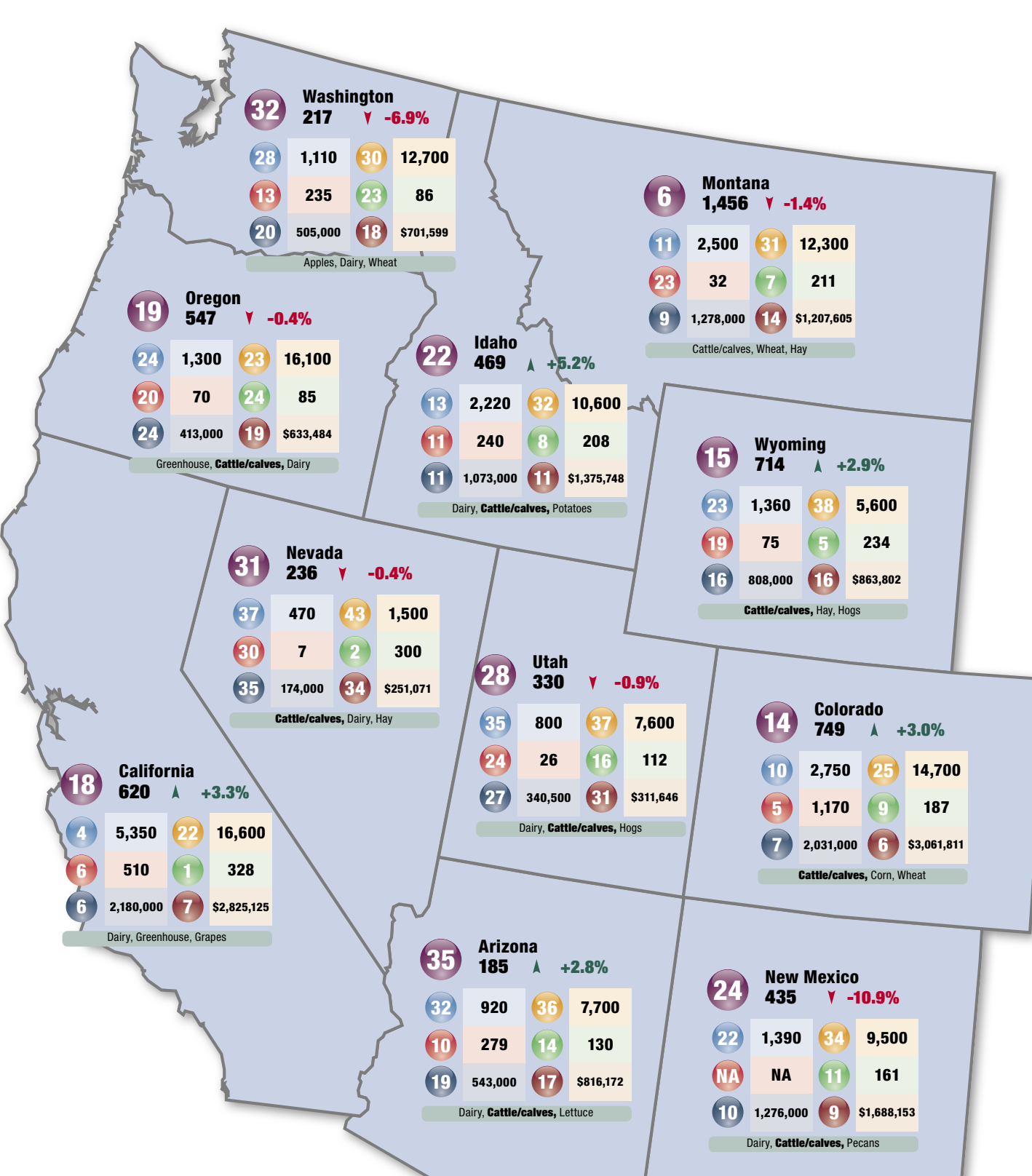
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## Legend

- State ranking-beef cows
- Beef cows (in thousands)
- State ranking-cattle/calves inventory
- Cattle/calves inventory (in thousands)
- State ranking-cattle on feed
- Cattle on feed (in thousands)
- State ranking-cattle marketings
- Cattle marketings (in thousands of head)
- Percentage increase/decrease in beef cows 2011-2012
- State ranking-cattle/calves operations
- Cattle/calves operations
- State ranking-average operation size (# of head)
- Average operation size (# of head)
- State ranking-cash receipts
- Cash receipts (in thousands)

### Missouri

Ranking: 3, Value: 1,857, Change: -0.4%

Ranking: 7, Value: 3,900, Change: 2\*

Ranking: 22, Value: 55, Change: 27\*

Ranking: 13, Value: 862,000, Change: 10

Ranking: 46, Value: 5.5, Change: +7.8%

### Texas

Ranking: 1, Value: 4,365, Change: -13.1%

Ranking: 1, Value: 7,820,000, Change: 1

### Alabama

Ranking: 17, Value: 650, Change: -1.4%

Ranking: 26, Value: 1,210, Change: NA

### Florida

Ranking: 10, Value: 940, Change: +1.5%

Ranking: 16, Value: 1,710, Change: NA

### Georgia

Ranking: 20, Value: 512, Change: +2.0%

Ranking: 30, Value: 1,020, Change: NA

### South Carolina

Ranking: 36, Value: 184, Change: +0.0%

Ranking: 39, Value: 370, Change: NA

### North Carolina

Ranking: 26, Value: 360, Change: +1.1%

Ranking: 34, Value: 810, Change: NA

### West region

Cattle/calves (# of head): 20,323,000

Calf crop: 8,509,000

Cattle on feed: 2,644,000

Cattle marketings: 10,645,300

Calf marketings: 2,095,700

Cattle/calves operations: 116,130

100-499 head (operations): 17,040

500+ head (operations): 7,800

Cash receipts: \$13,784,754,000

### North-Central region

Cattle/calves (# of head): 22,520,000

Calf crop: 7,760,000

Cattle on feed: 5,040,000

Cattle marketings: 12,622,400

Calf marketings: 1,318,800

Cattle/calves operations: 156,700

100-499 head (operations): 43,100

500+ head (operations): 8,800

Cash receipts: \$18,294,418,000

### South-Central region

Cattle/calves (# of head): 28,860,000

Calf crop: 10,915,000

Cattle on feed: 5,755,000

Cattle marketings: 17,414,000

Calf marketings: 2,013,000

Cattle/calves operations: 338,100

100-499 head (operations): 50,800

500+ head (operations): 8,600

Cash receipts: \$25,021,284,000

### East region

Cattle/calves (# of head): 19,065,500

Calf crop: 8,129,200

Cattle on feed: 594,000

Cattle marketings: 4,640,600

Calf marketings: 3,101,500

Cattle/calves operations: 354,580

100-499 head (operations): 38,360

500+ head (operations): 4,360

Cash receipts: \$5,825,013,000

Source: USDA 2012 statistics  
\* Data from 2007.