



supporting and promoting imported meat

Irish Meat Marketing Seminar

Killashee House Hotel, Kilcullen Road, Naas, Co. Kildare

January 8th, 2016



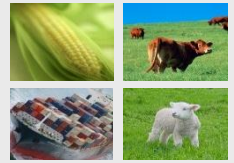
Perspectives of Global Exporters

Laurie Bryant

Executive Director

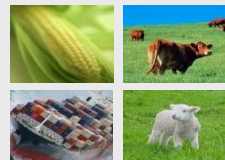
Meat Import Council of America

Presentation Outline



- ❖ **US & Canada Beef Access**
- ❖ **Review Trends in Major Global Exporters**
 - **Beef**
 - US
 - Australia
 - New Zealand
 - Uruguay
 - Brazil
 - Argentina
 - Paraguay
 - **Sheepmeat**
 - Australia
 - New Zealand
- ❖ **2016?**

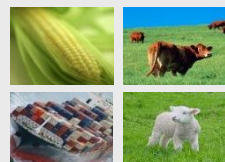
Overview of US & Canada Beef TRQs



US WTO TRQs	Australia	New Zealand	Japan	Other	Uruguay	Argentina
(MT)	418,214	213,402	200	64,805	20,000	20,000
US CAFTA-DR	Nicaragua	Costa Rica	Honduras	Dominican Republic	El Salvador	
(MT)	15,000	15,054	750	2,400	150	
Canada WTO TRQs	Australia	New Zealand		Other		
(MT)	35,000	29,600		11,809		
Supplemental						

Source: CPB

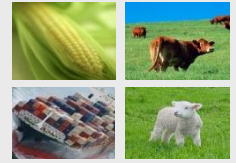
US TRQs c.f. In Quota Beef Imports 2015 (Dec 28)



	Australia WTO	Australia FTA	Australia Total	New Zealand	Japan	Other	Uruguay	Argentina
Imports	378,214	33,989	412,203	209,768	183	44,545	19,760	-
TRQ	378,214	40,000	418,214	213,402	200	64,805	20,000	20,000
% Filled	100.00%	84.97%	98.56%	98.30%	91.48%	68.74%	98.80%	0.00%

Source: CPB

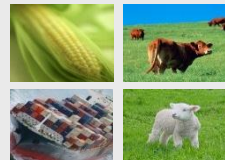
Major Beef Exporters



Top Global Beef Exporting Countries: Cattle Inventory Status Update, January 1st Stocks, 000 Head

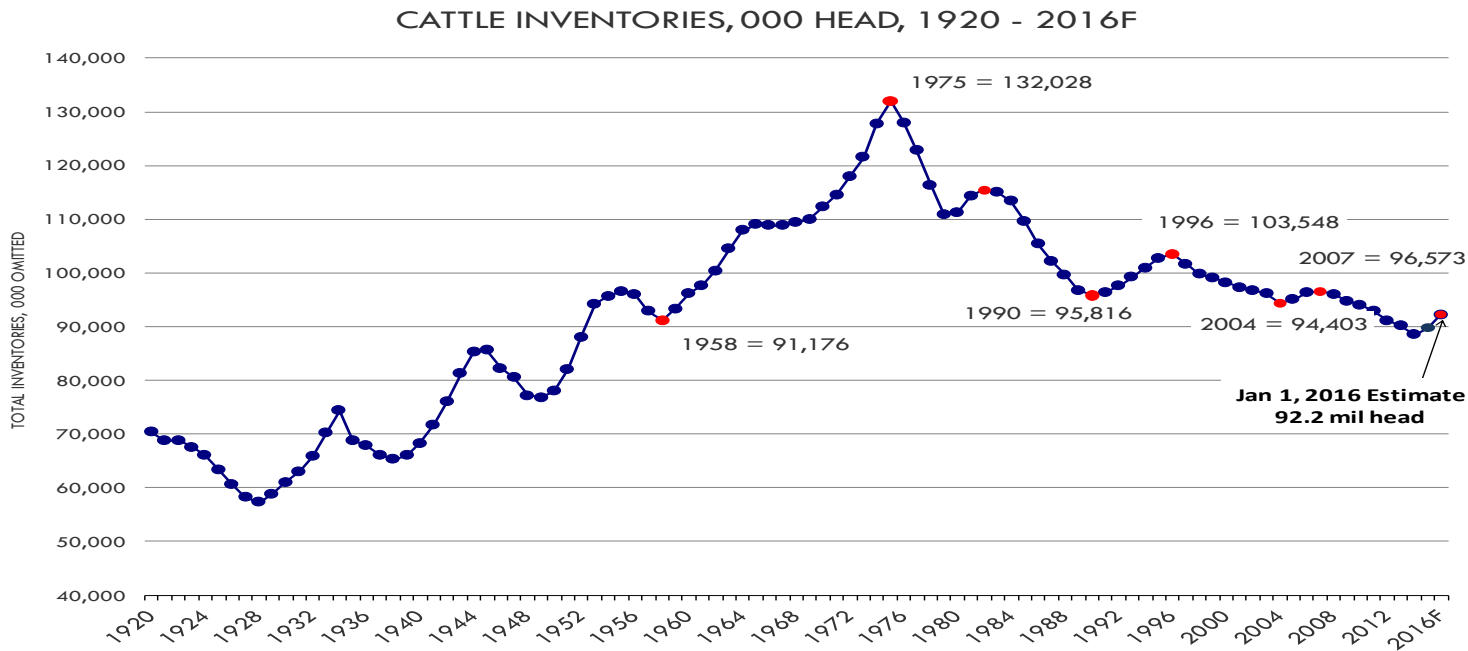
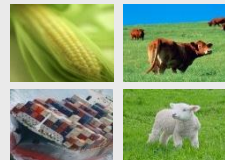
	2012	2013	2014	% ch. vs. 2013	% ch. vs. 2012	2015F	% ch. vs. 2014	% ch. vs. 2012	2016F	% ch. vs. 2015
Australia	28,506	29,000	29,290	1.0%	2.8%	27,600	-5.8%	-3.2%	26,150	-5.3%
Brazil	197,550	203,273	207,959	2.3%	5.3%	213,035	2.4%	7.8%	219,093	2.8%
USA	91,160	90,095	88,526	-1.7%	-2.9%	89,800	1.4%	-1.5%	92,900	3.5%
New Zealand	10,021	10,180	10,183	0.0%	1.6%	10,368	1.8%	3.5%	10,283	-0.8%
Uruguay	11,232	11,384	11,903	4.6%	6.0%	12,053	1.3%	7.3%	12,063	0.1%
Canada	12,245	12,305	12,220	-0.7%	-0.2%	11,920	-2.5%	-2.7%	11,920	0.0%
Mexico	20,090	18,521	17,760	-4.1%	-11.6%	17,120	-3.6%	-14.8%	16,450	-3.9%
Argentina	49,597	51,095	51,545	0.9%	3.9%	51,545	0.0%	3.9%	51,995	0.9%

Source: USDA



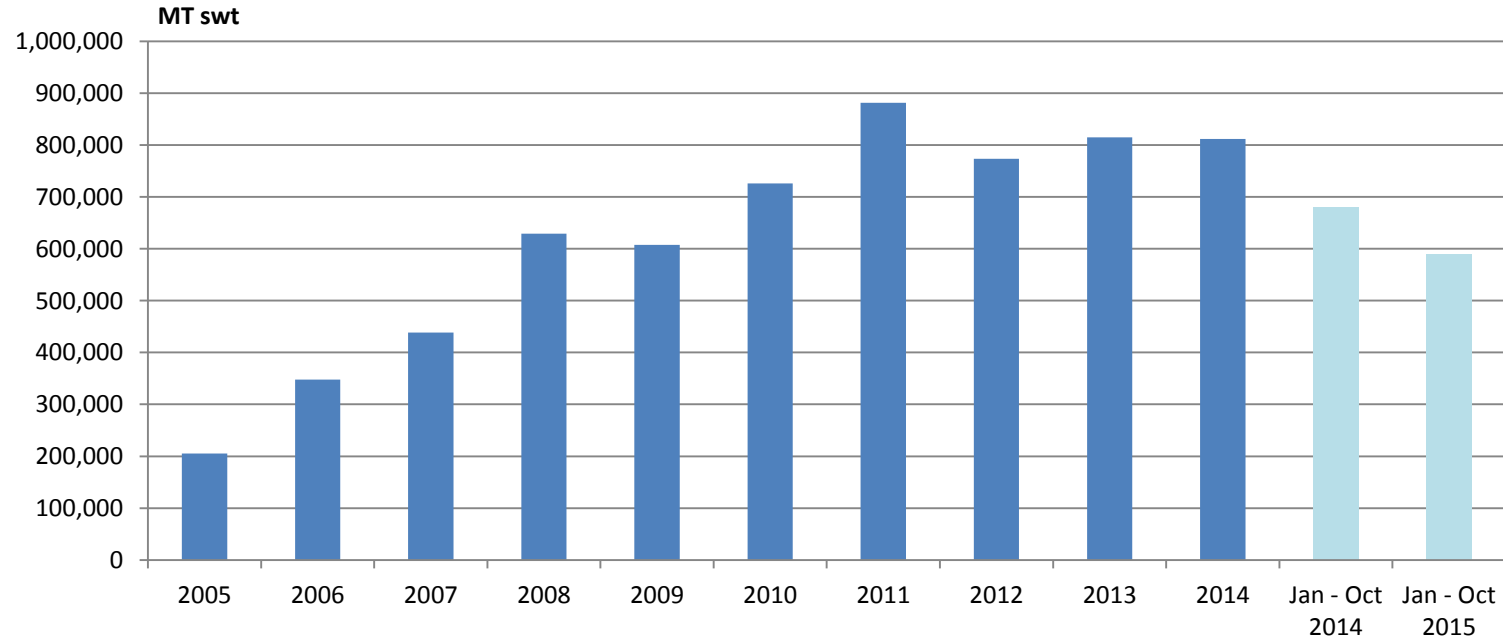
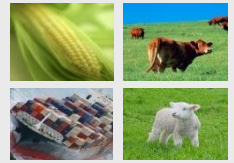
United States

US Cattle Inventories Forecast up 2.7% on Jan 1, 2016

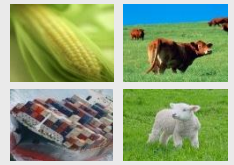


Source: USDA

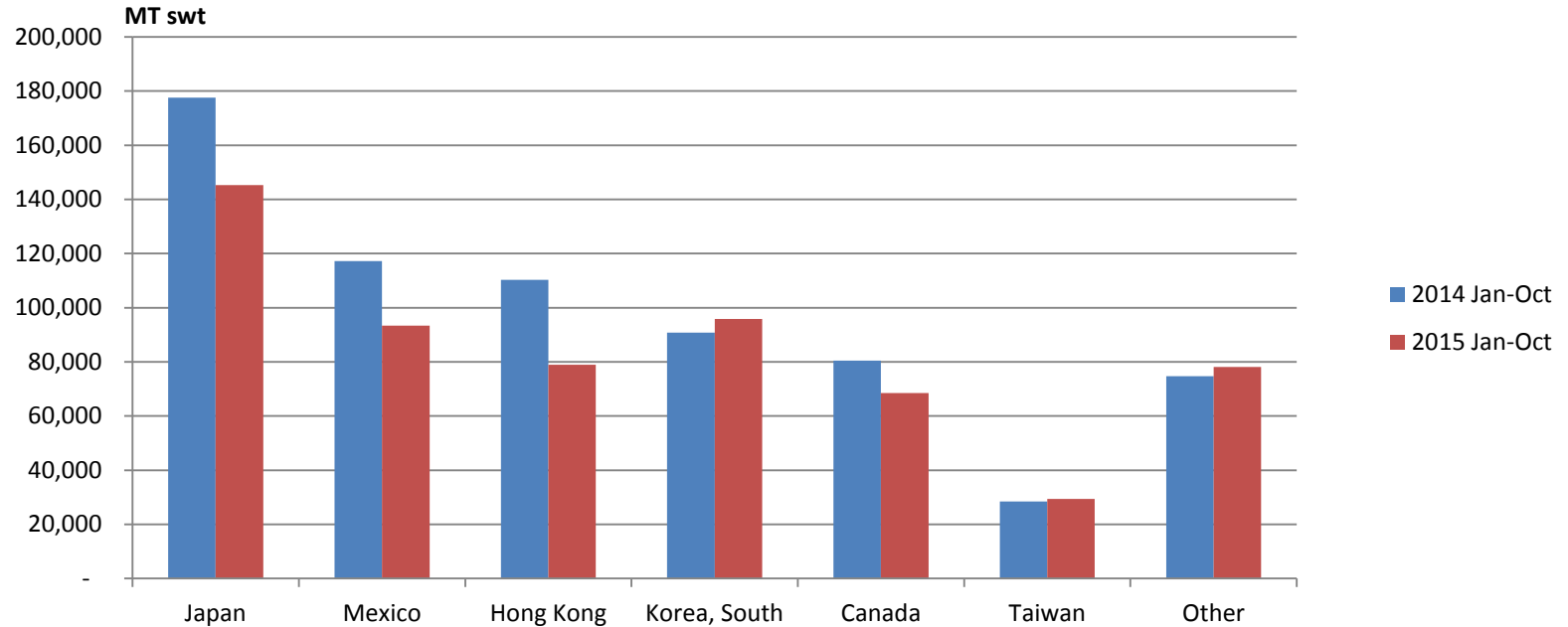
US Beef Exports



Source: US Census Bureau trade data



Major US Beef Markets



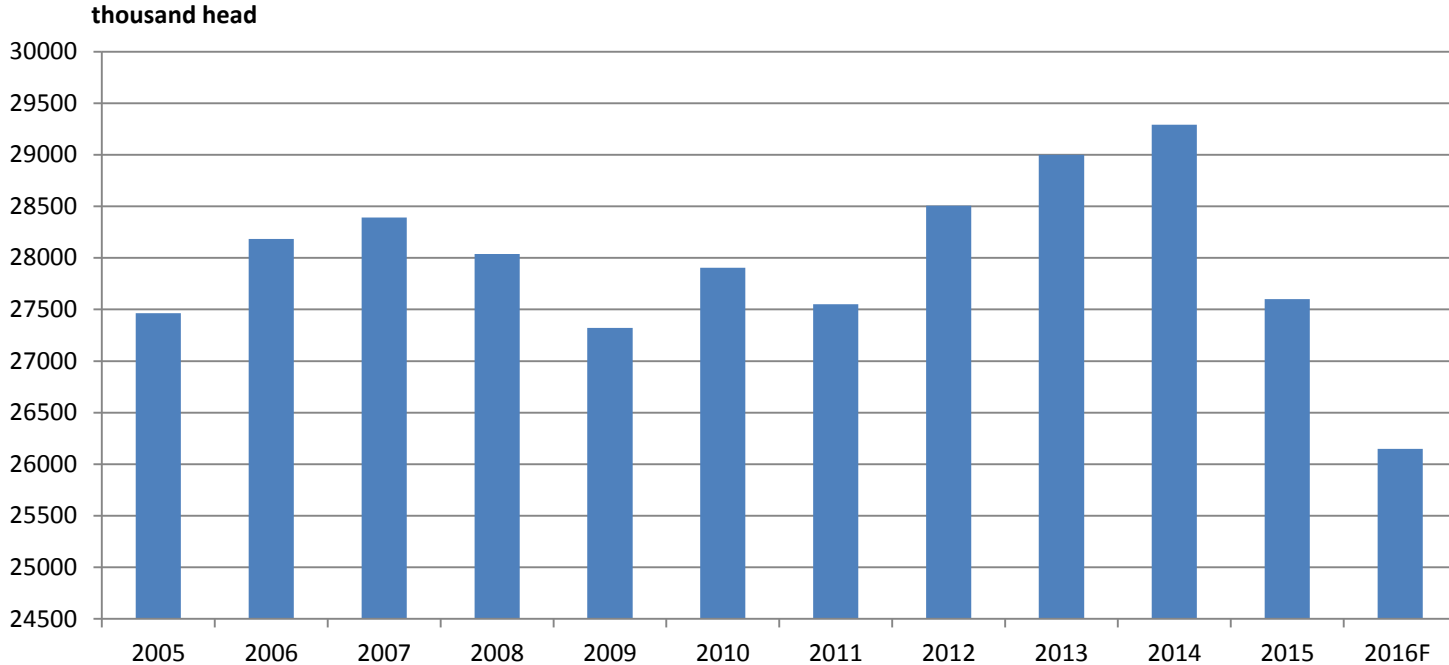
Source: US Census Bureau trade data

AUSTRALIA

MLA PRESENTATION TO MICA CONFERENCE



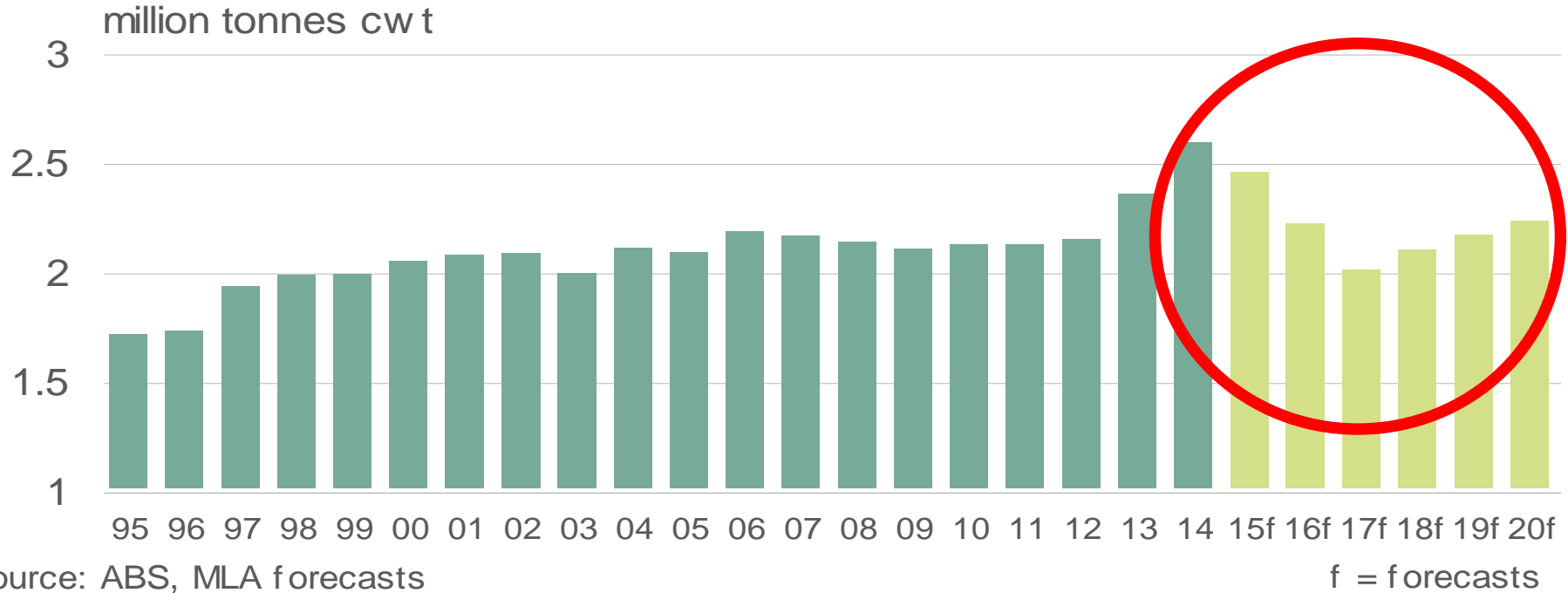
CATTLE NUMBERS DECLINE SHARPLY



Source: ABS, MLA Forecasts

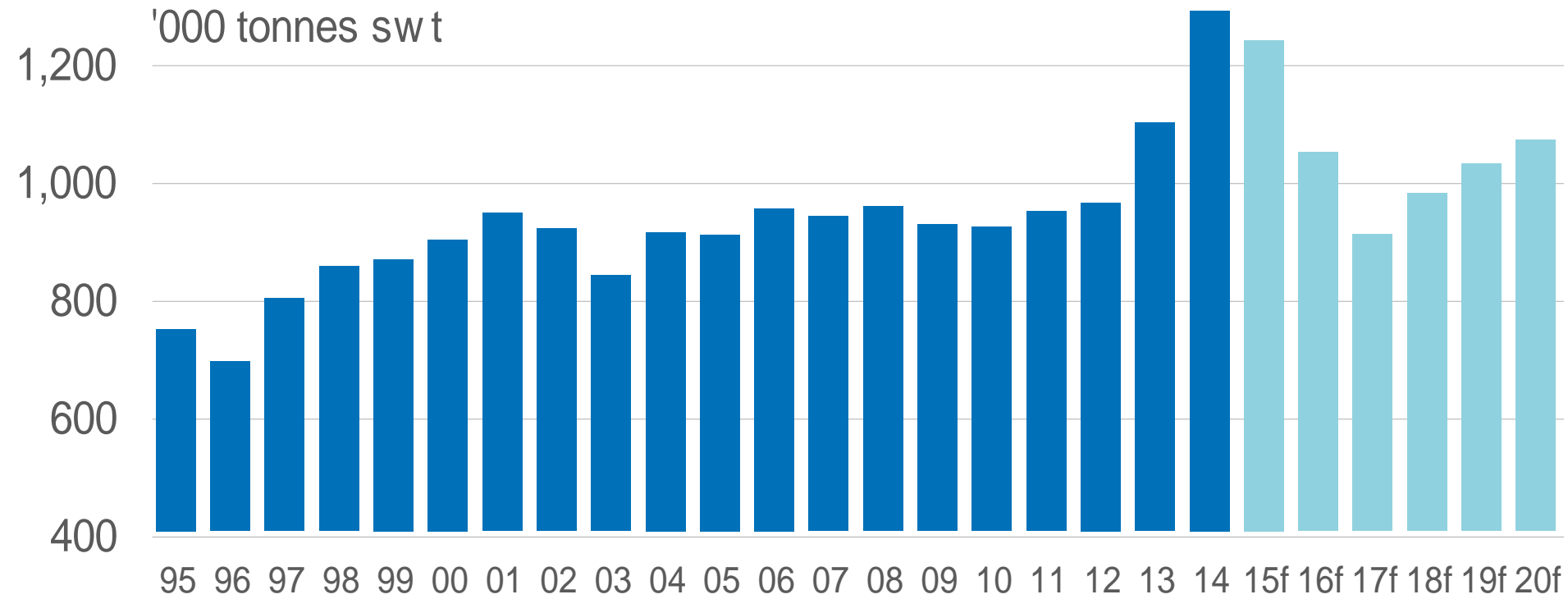


AFTER RECORD BEEF PRODUCTION LEVELS, VOLUMES TO REVERT BACK



BEEF EXPORTS

ONE MILLION TONNES – THE NEW NORM?...

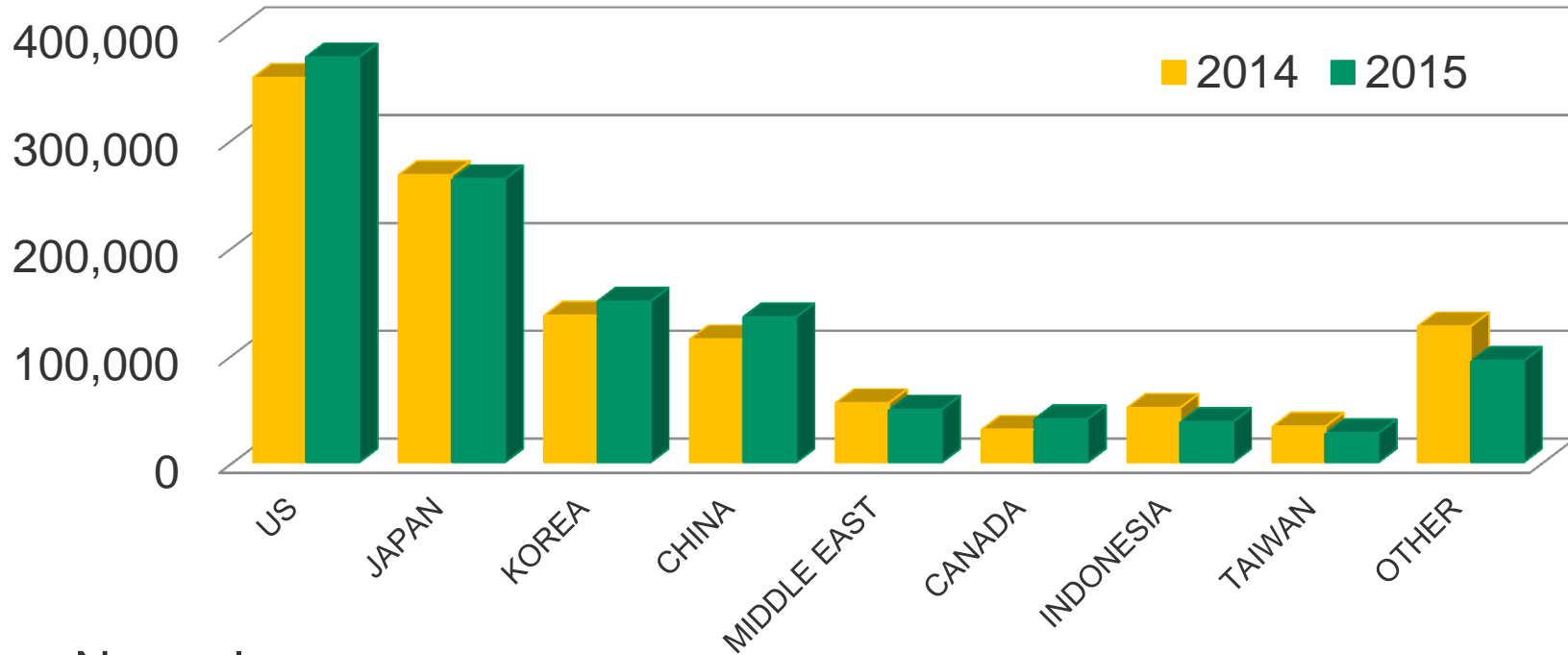


Source: DA, MLA forecasts

f = forecast



US AND JAPAN DOMINATE MARKET SHARE*



* Jan-Nov volumes

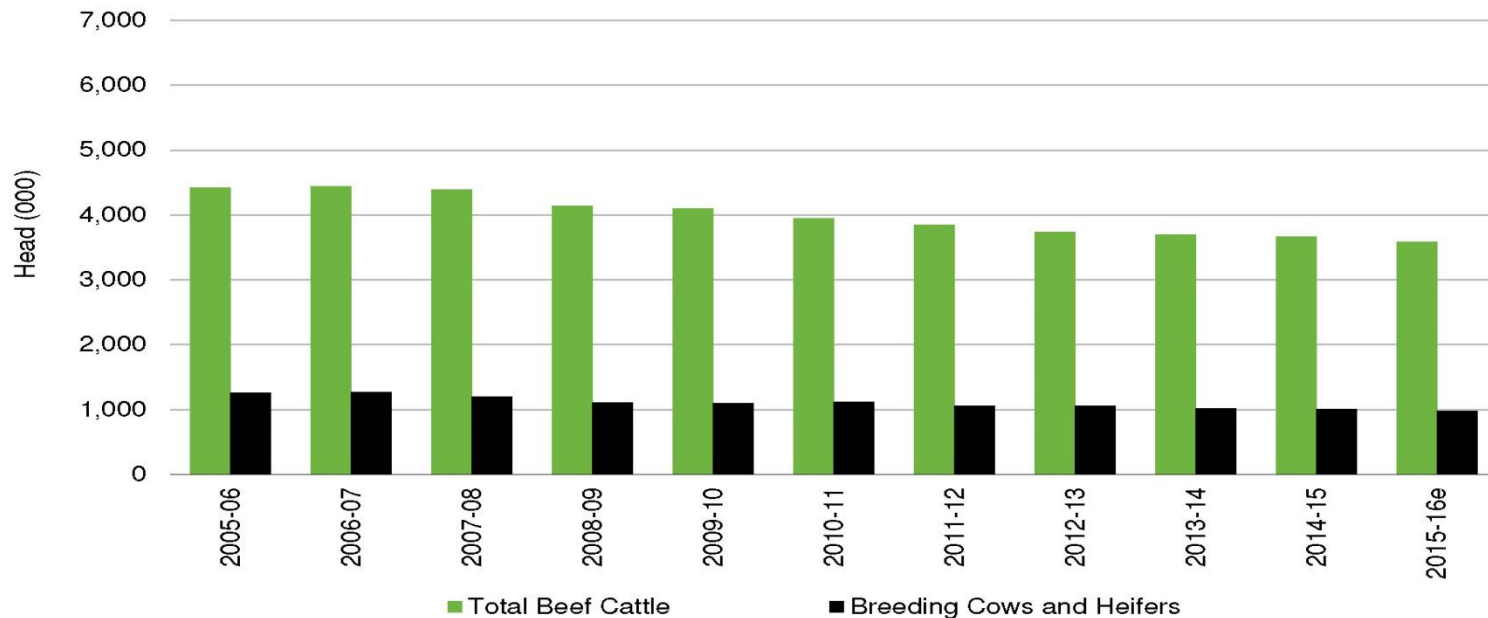


New Zealand

Beef+Lamb Presentation to MICA Conference

Total Beef Cattle

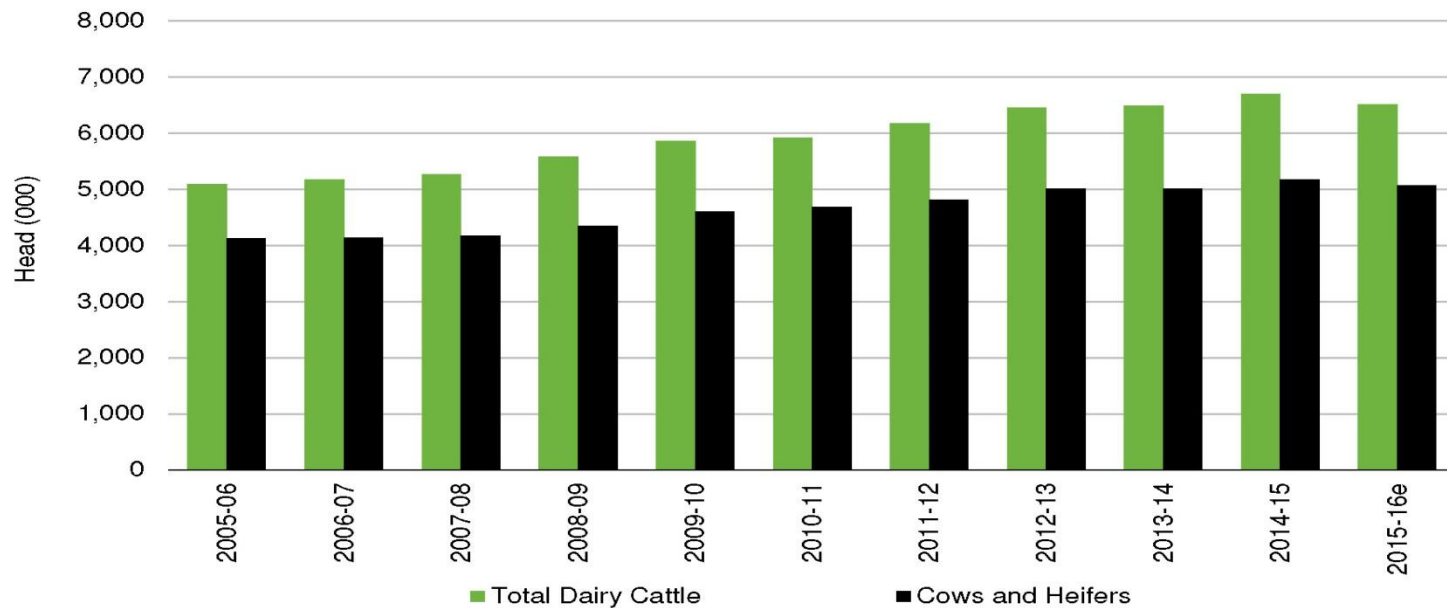
New Zealand - Year Ending June



Source: Beef + Lamb New Zealand Economic Service | Statistics New Zealand

Total Dairy Cattle

New Zealand - Year Ending June



Source: Beef + Lamb New Zealand Economic Service | Statistics New Zealand

Export Cattle Slaughter

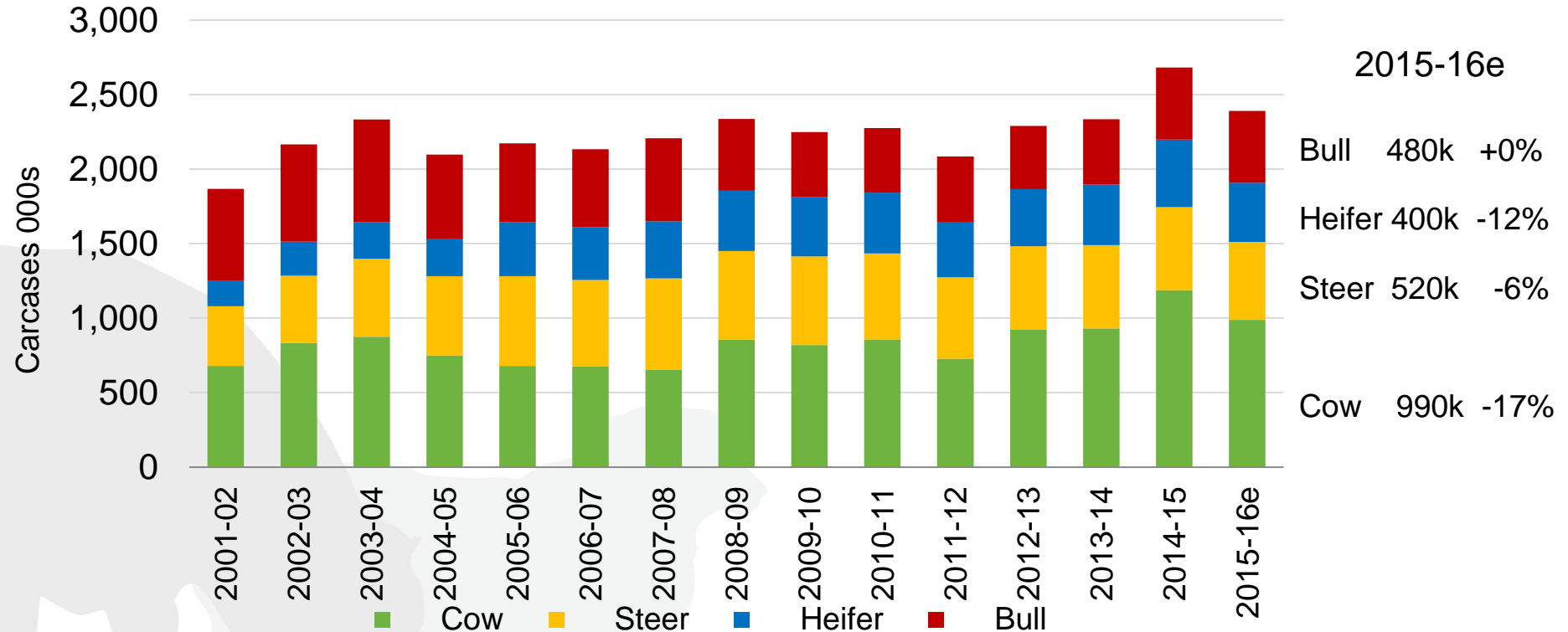
September Year



Source: Beef + Lamb New Zealand Economic Service

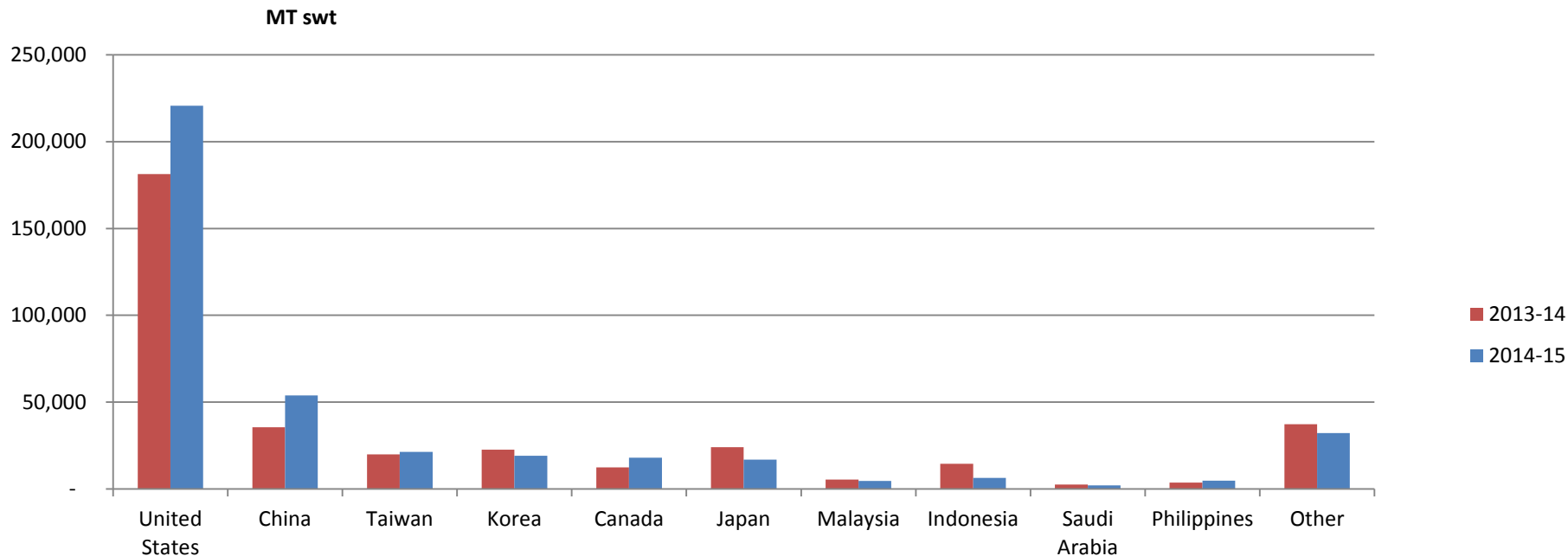
Export Cattle Slaughter x Category

September Year



Source: Beef + Lamb New Zealand Economic Service

NZ Beef and Veal Exports



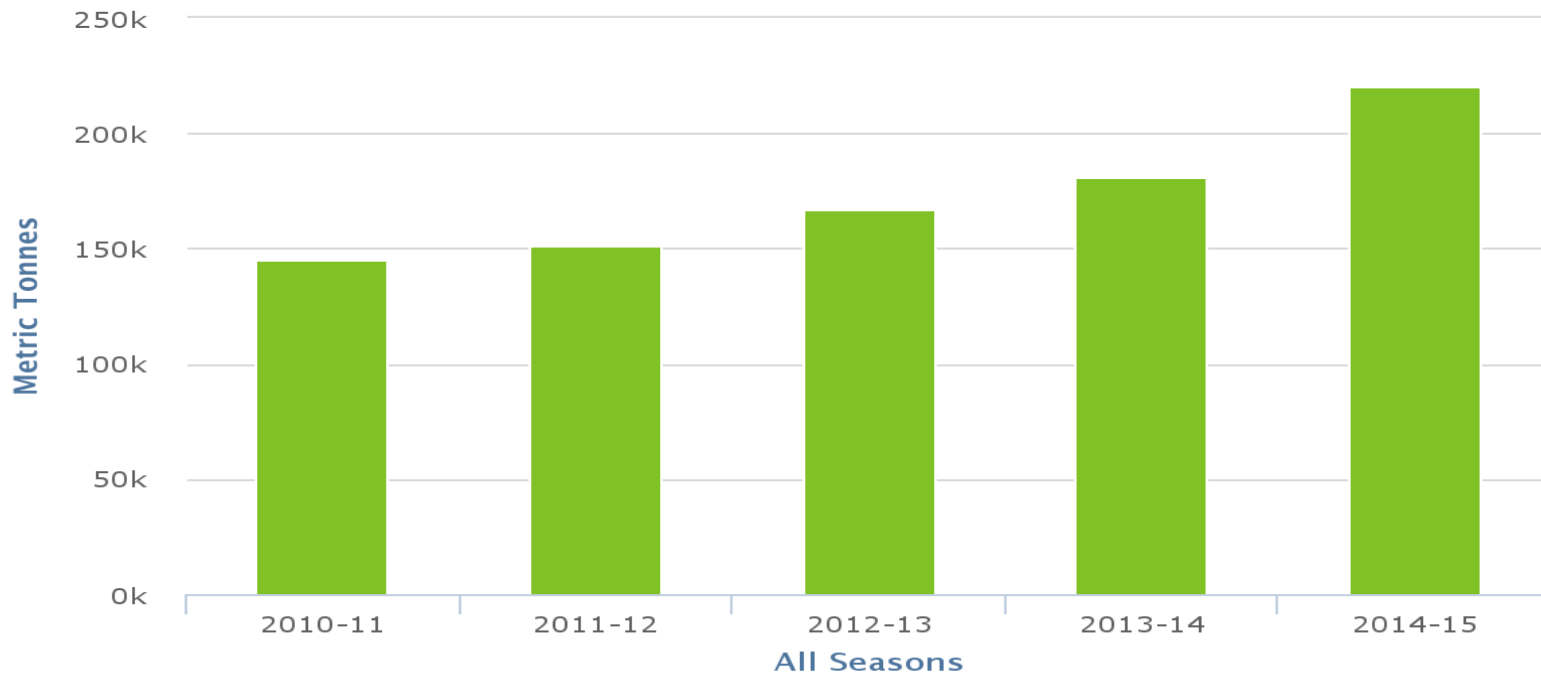
Source: Beef+Lamb NZ

Strong demand for beef in US

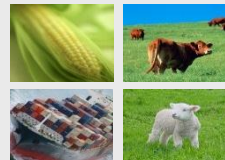


Export Data

Volume of Beef (excl. veal) exports to USA

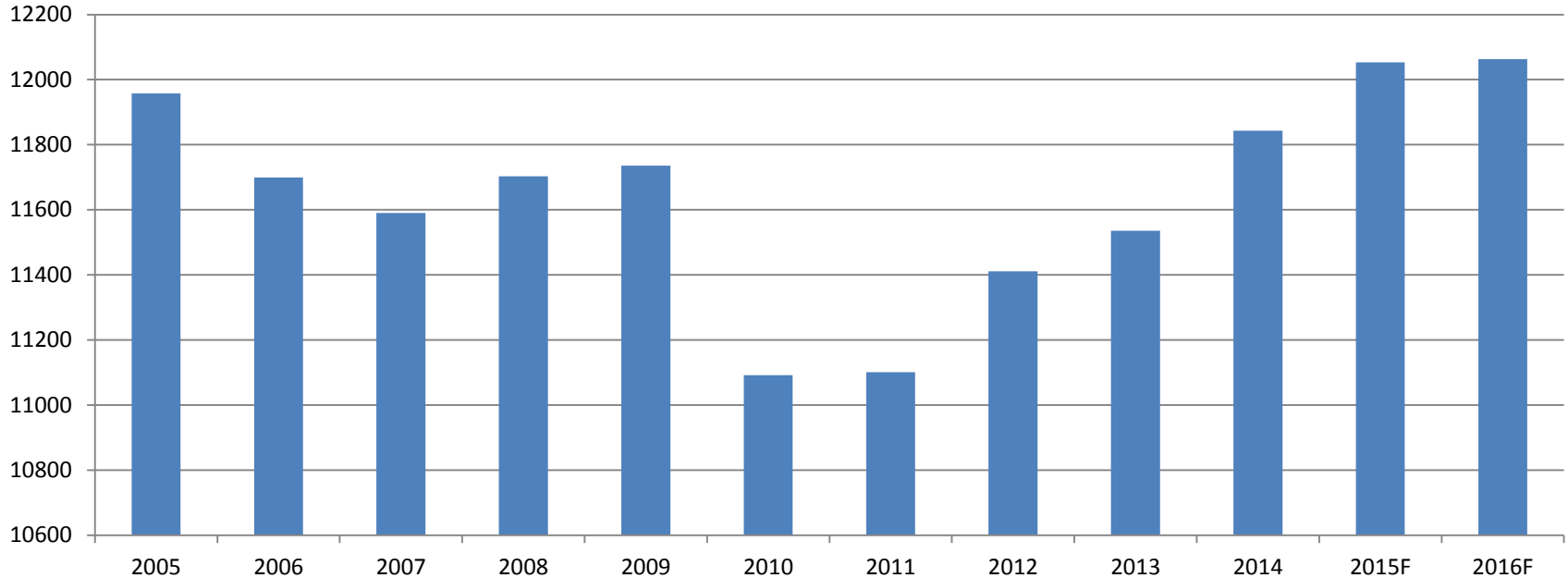
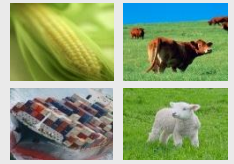


Source: B+LNZ Economic Service



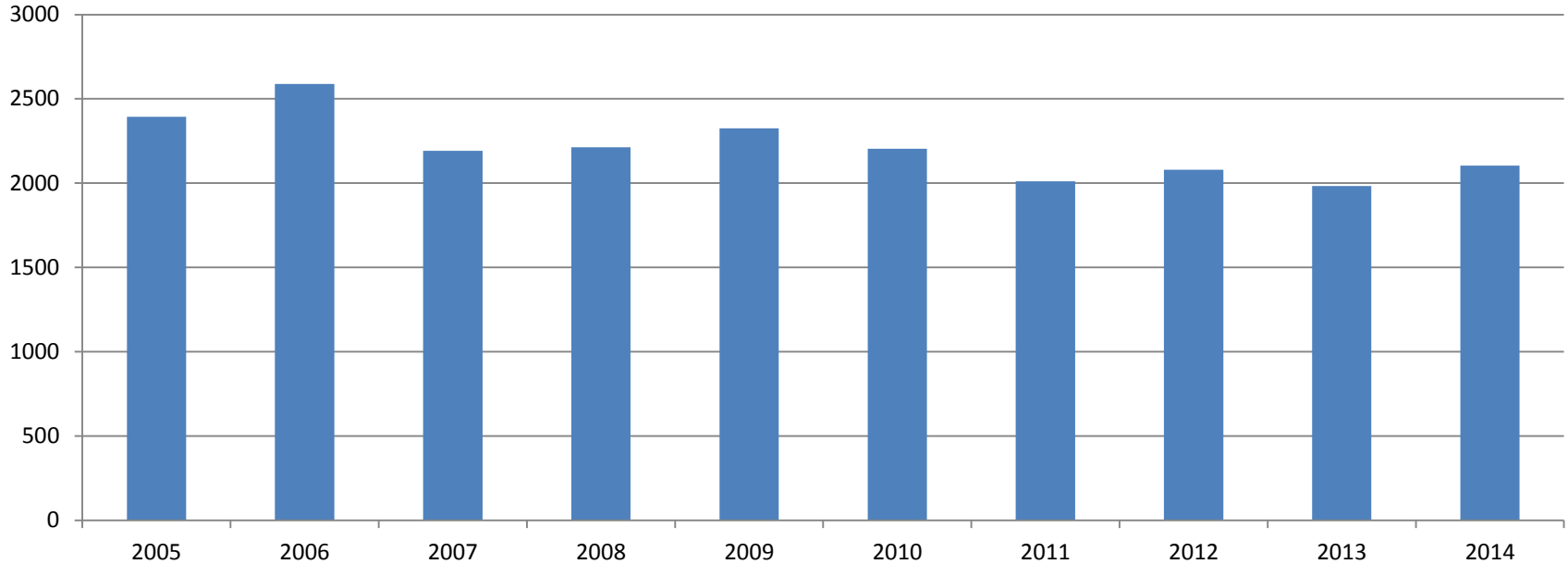
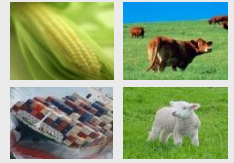
Uruguay

Uruguay Cattle Numbers



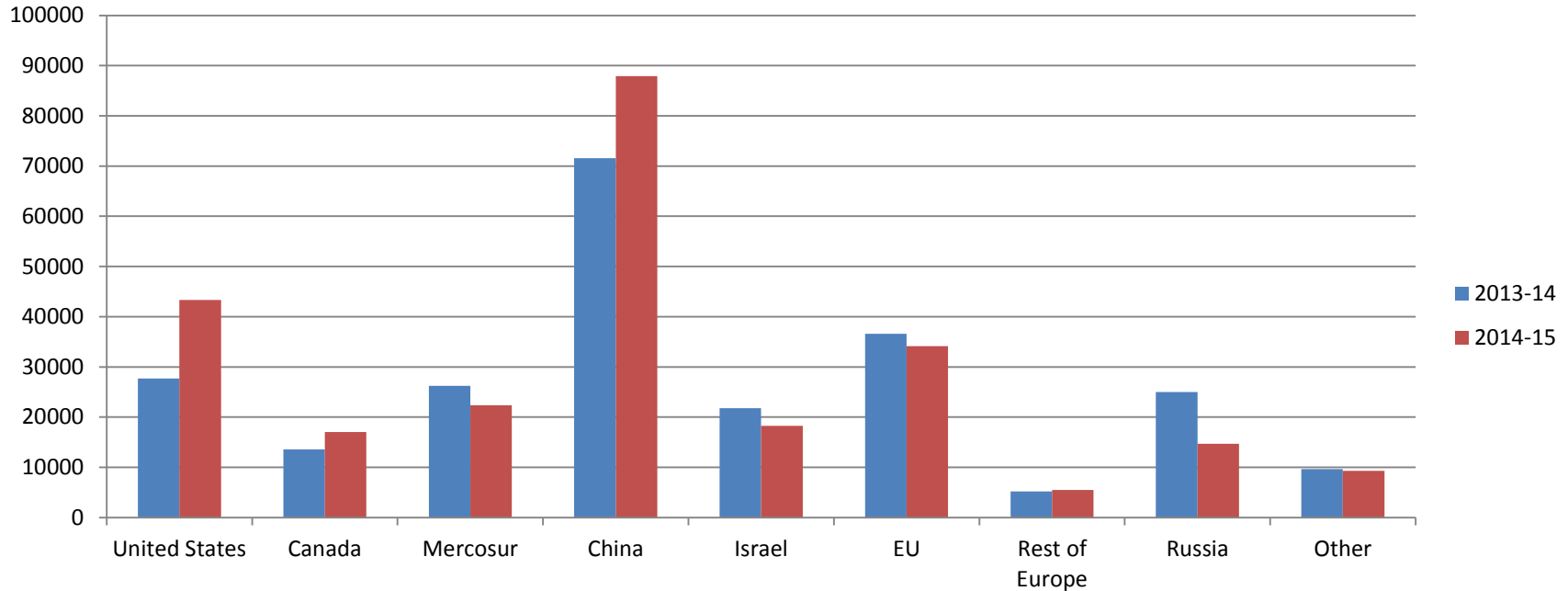
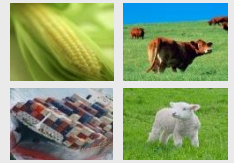
Source: INAC

Uruguay Cattle Slaughter



Source: INAC

Uruguay Beef Exports



Source: INAC

Brazil

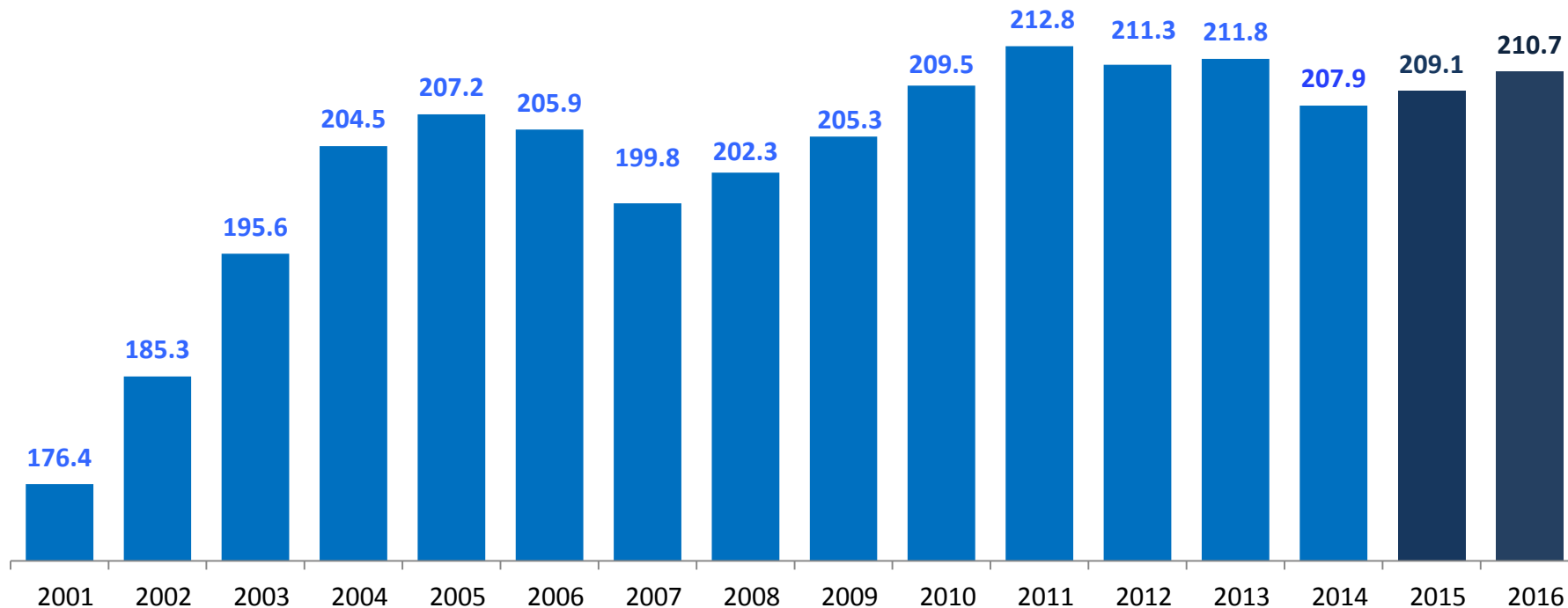
ABIEC Presentation to MICA Conference

* 2015, 2016 - Projection

Source: Agroconsult/IBGE

CATTLE HERD

Million heads

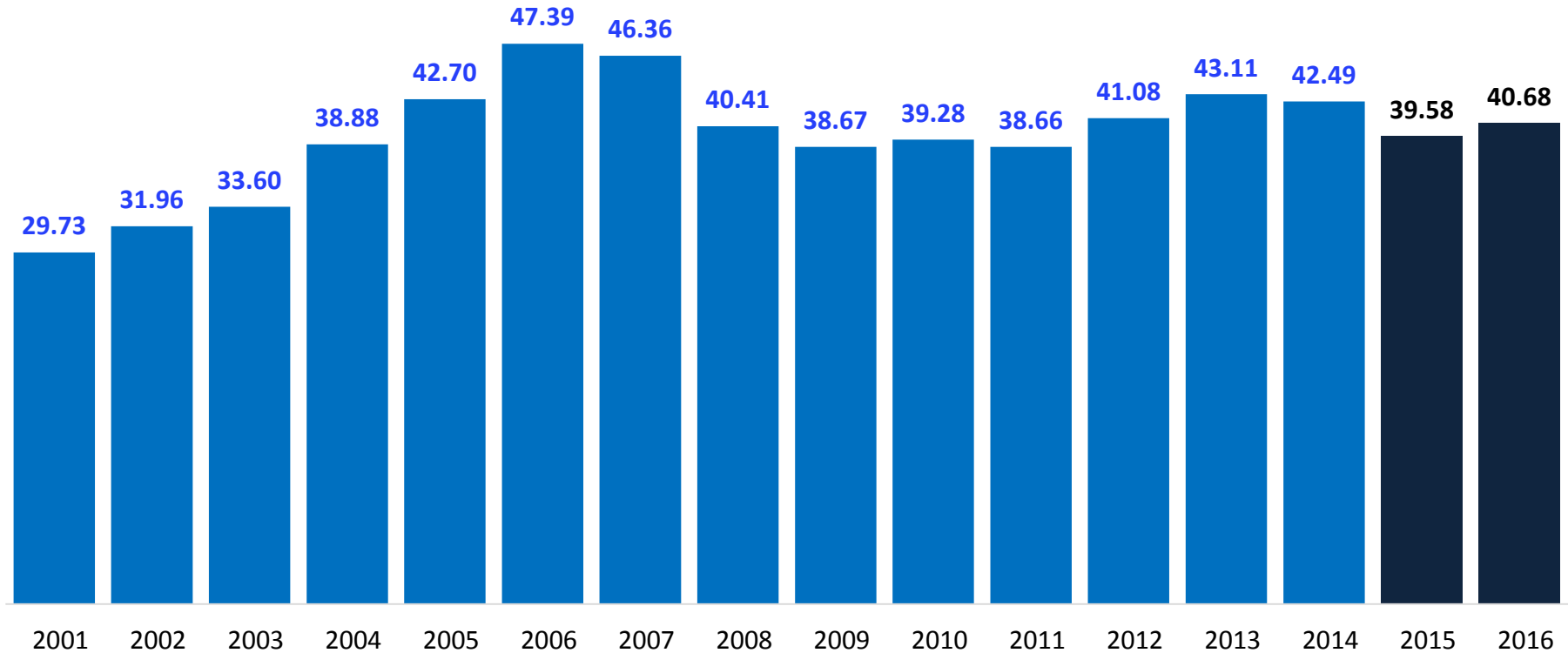


* 2015, 2016 - Projection

Source: Agroconsult/IBGE

SLAUGHTER - TOTAL

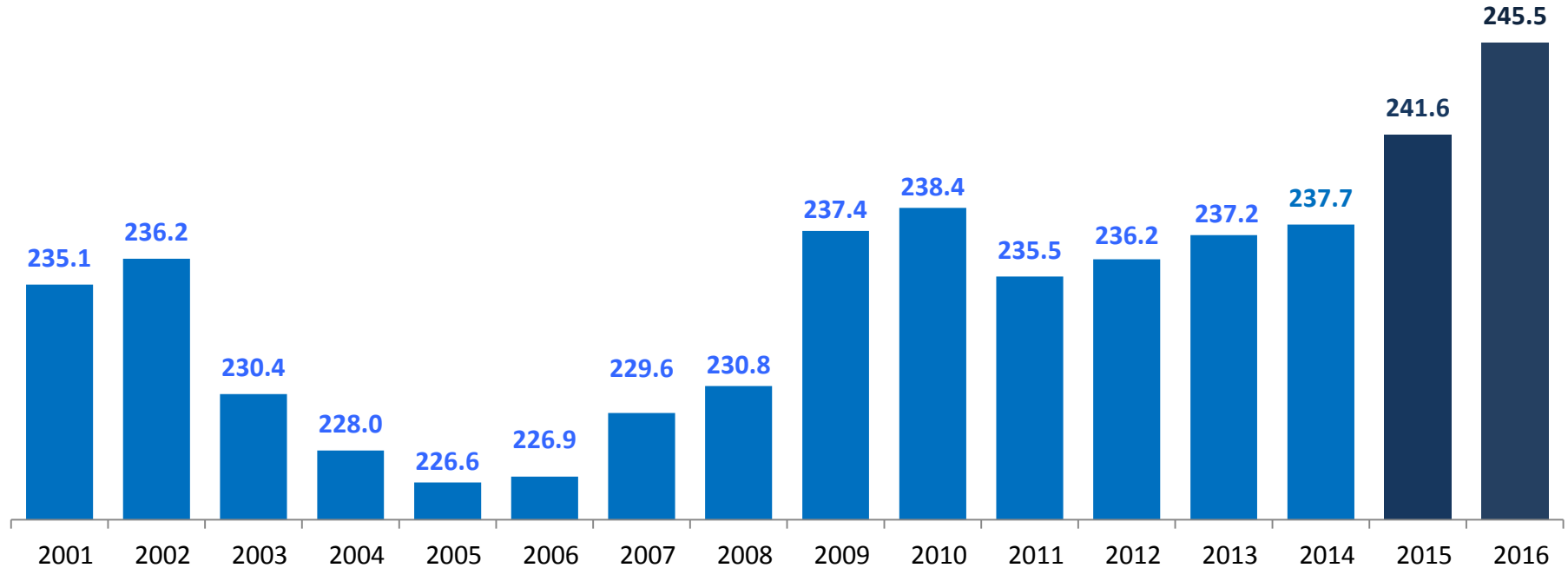
Million heads per year



* 2015, 2016 - Projection

Source: Agroconsult/IBGE

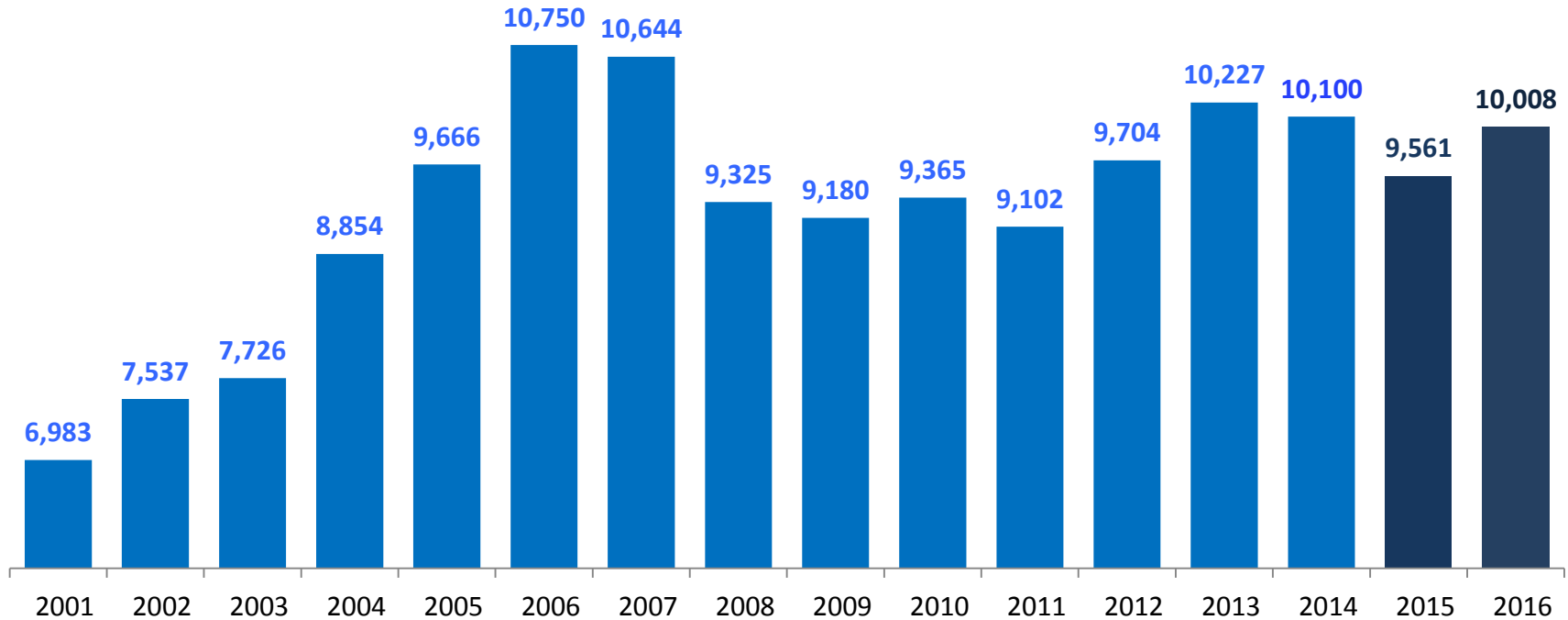
AVERAGE CARCASS WEIGHT - KG



* 2015, 2016 - Projection

Source: Agroconsult/IBGE

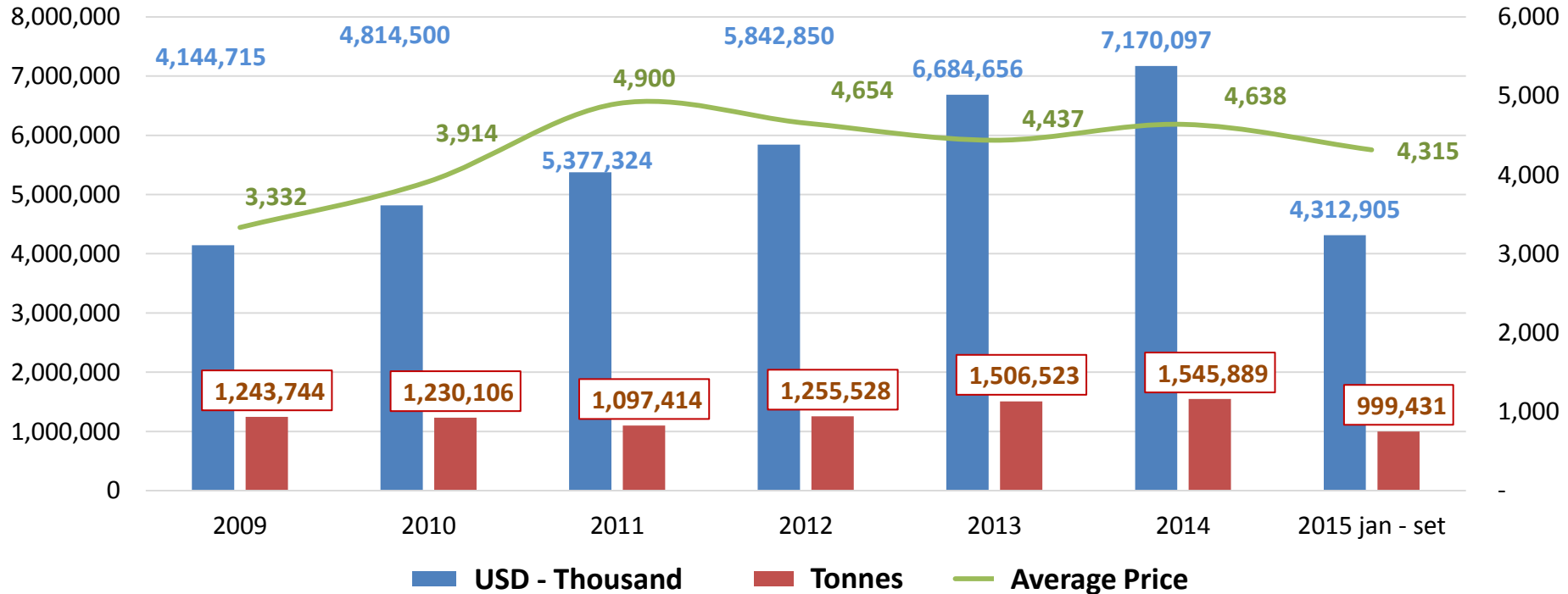
BEEF PRODUCTION 1,000 TONNES CWE



* 2015, 2016 - Projection

Source: Agroconsult/IBGE

BRAZILIAN BEEF EXPORTS

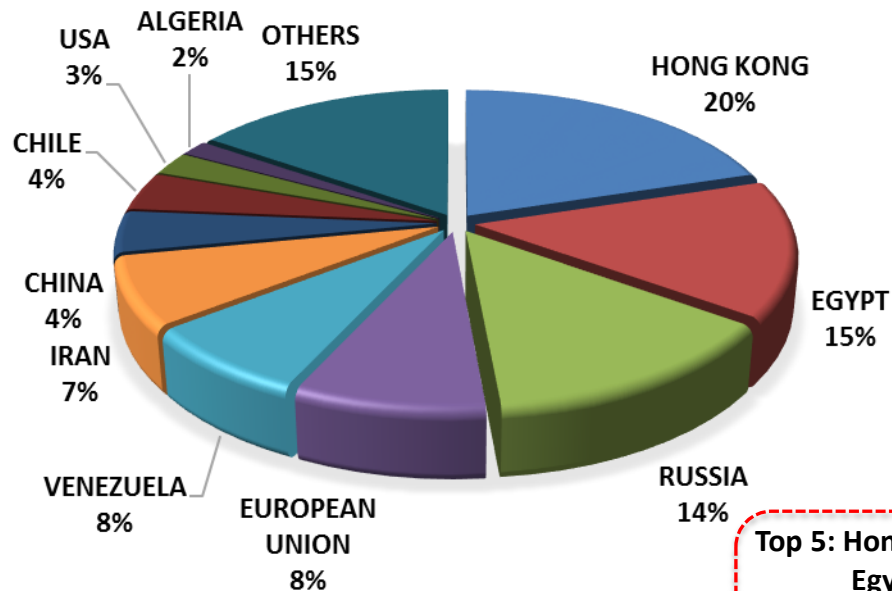


2015 (jan-sep)

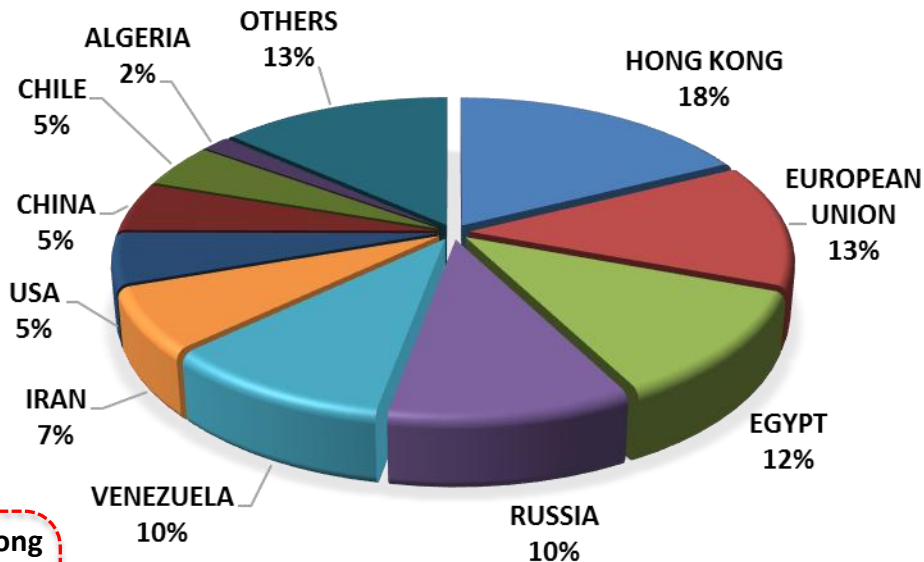
Source: Mdic/Secex/Abiec

BRAZILIAN BEEF EXPORTS - SHARE

TONNES – JAN/SEP 2015

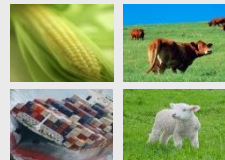


USD – JAN/SEP 2015



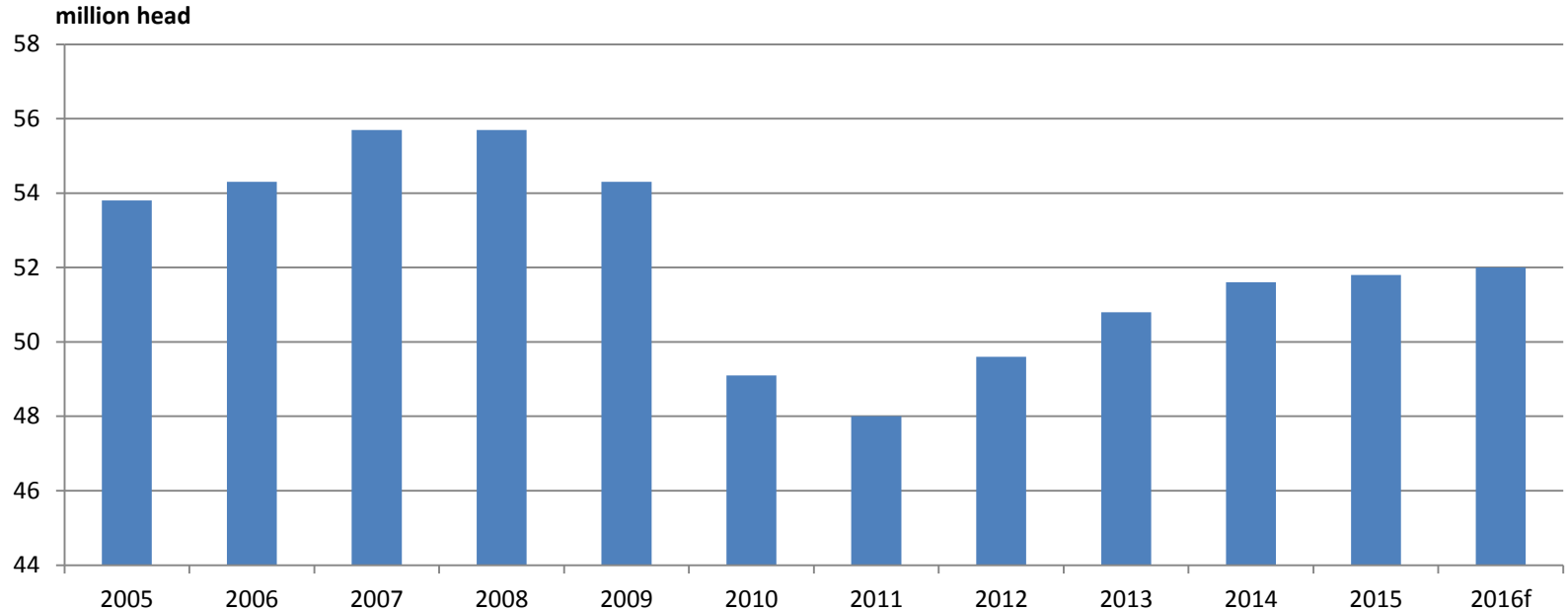
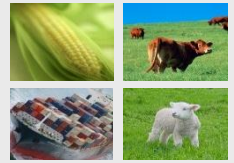
Top 5: Hong Kong
Egypt
Russia
Europe
Venezuela

Source: Mdic/Secex/Abiec



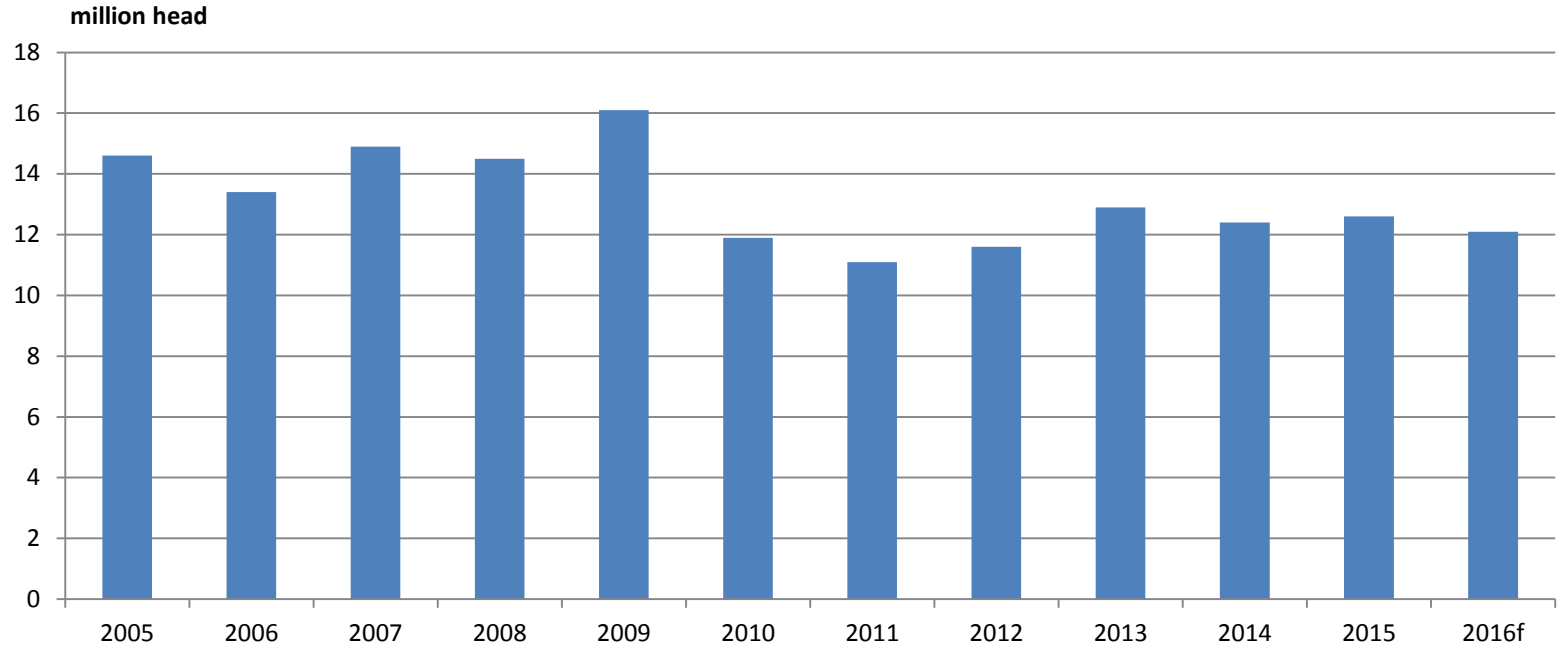
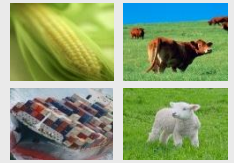
Argentina

Argentina Cattle Numbers



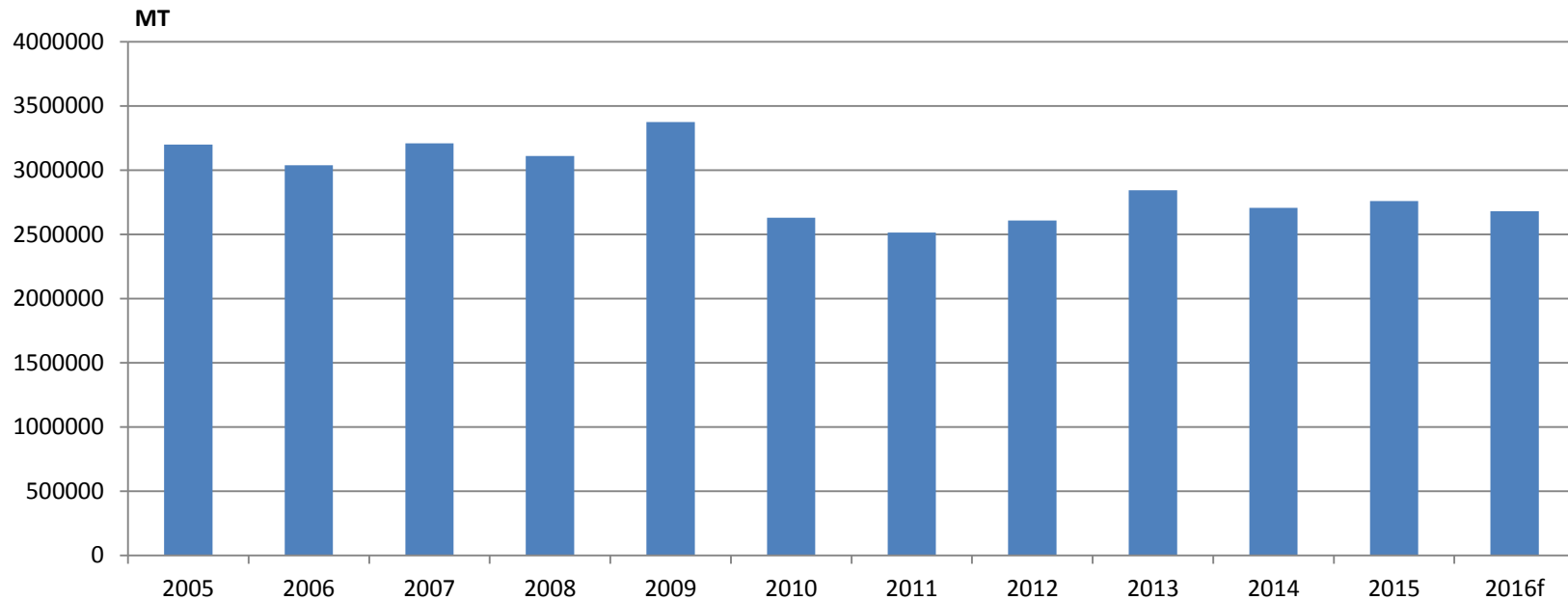
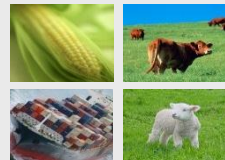
Source: USDA FAS GAIN Reports

Argentina Cattle Slaughter



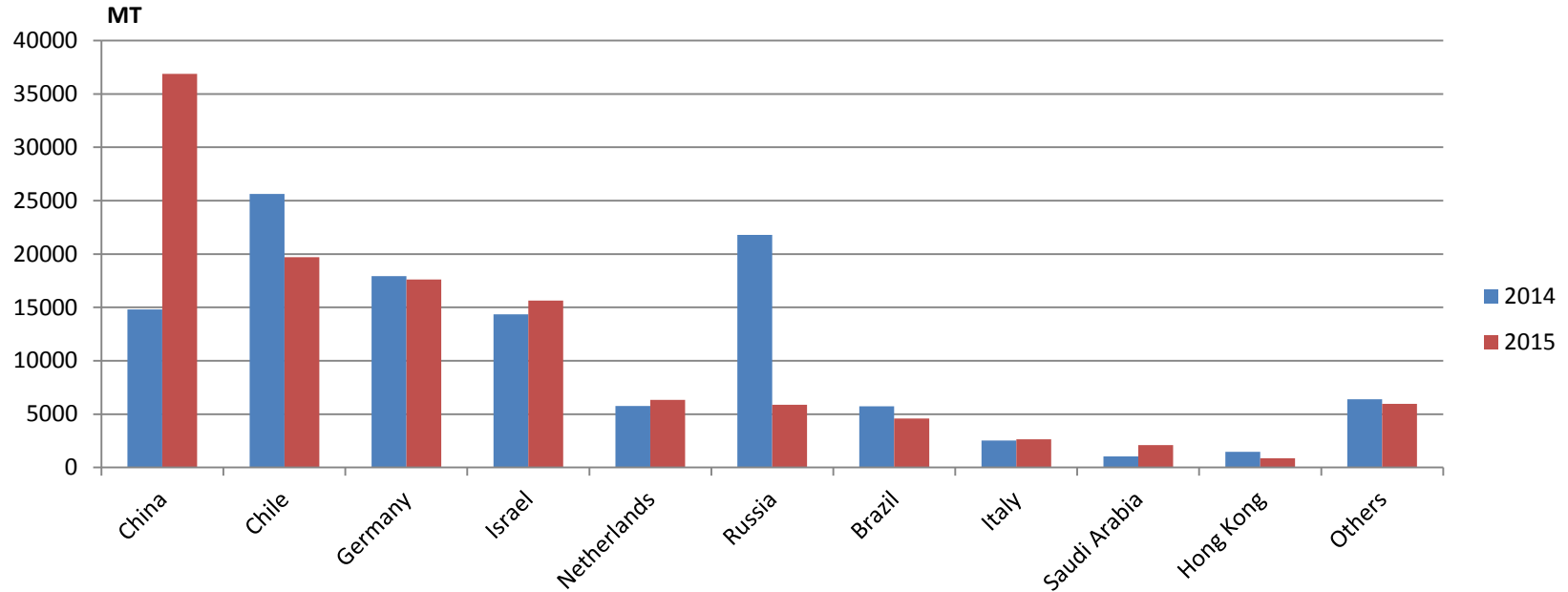
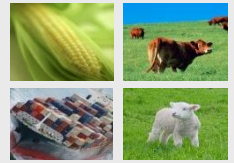
Source: USDA FAS GAIN Reports

Argentina Beef Production (CWE)

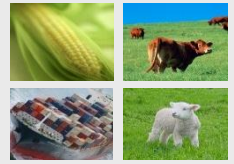


Source: USDA FAS GAIN Reports

Argentina Beef Exports (10 Mths)

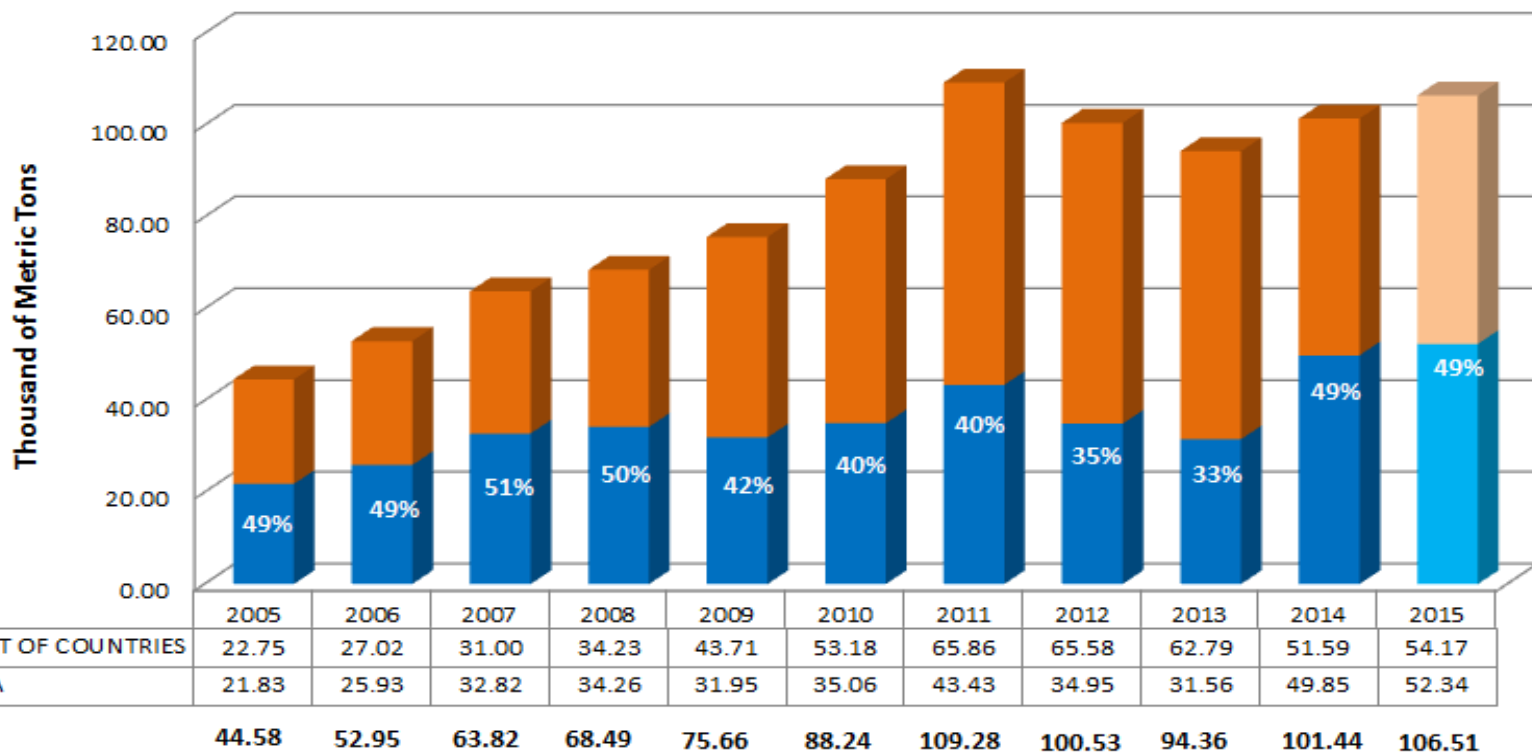


Source: USDA FAS GAIN Reports



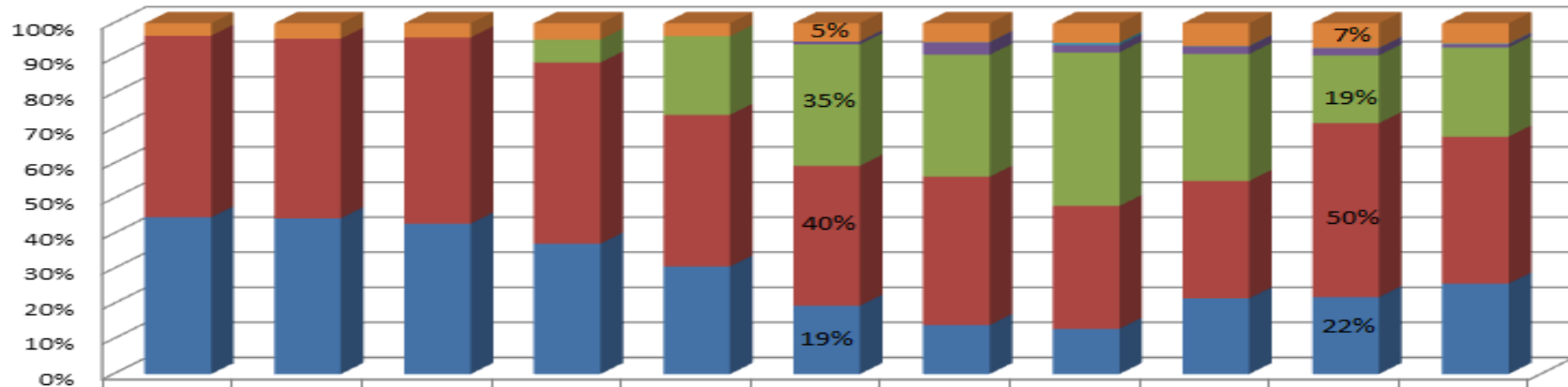
Nicaragua

Nicaragua Exports to USA



Nicaragua

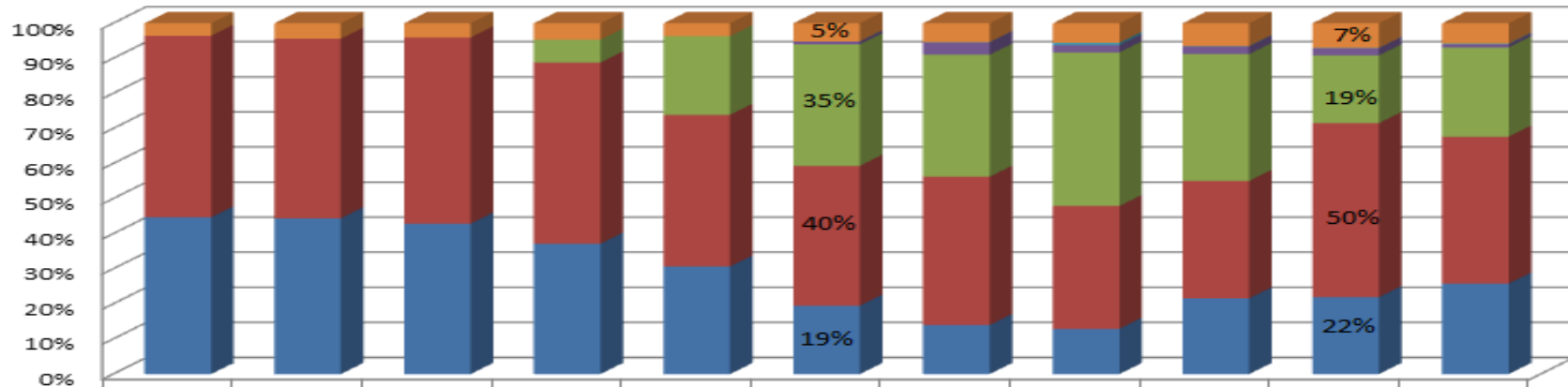
Beef and Offals Exports By Regions (Years 2005 - 2015)



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
ASIA	1,585	2,327	2,575	3,219	2,786	4,540	5,876	5,592	6,122	7,146	4,586
AFRICA	0	0	0	0	0	49	65	668	120	33	143
EUROPE	0	0	0	0	0	702	3,859	2,070	2,039	2,114	688
VENEZUELA	0	0	0	4,456	16,956	30,554	38,011	44,035	34,111	19,597	20,032
NORTH AMERICA	23,079	27,099	33,888	35,367	32,739	35,189	46,218	35,174	31,602	50,312	33,039
CENTRAL AMERICA	19,920	23,524	27,360	25,444	23,217	17,206	15,257	12,992	20,362	22,235	20,324
TOTAL MT	44,584	52,950	63,823	68,486	75,698	88,240	109,286	100,531	94,356	101,437	78,812

Nicaragua

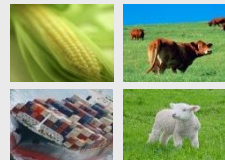
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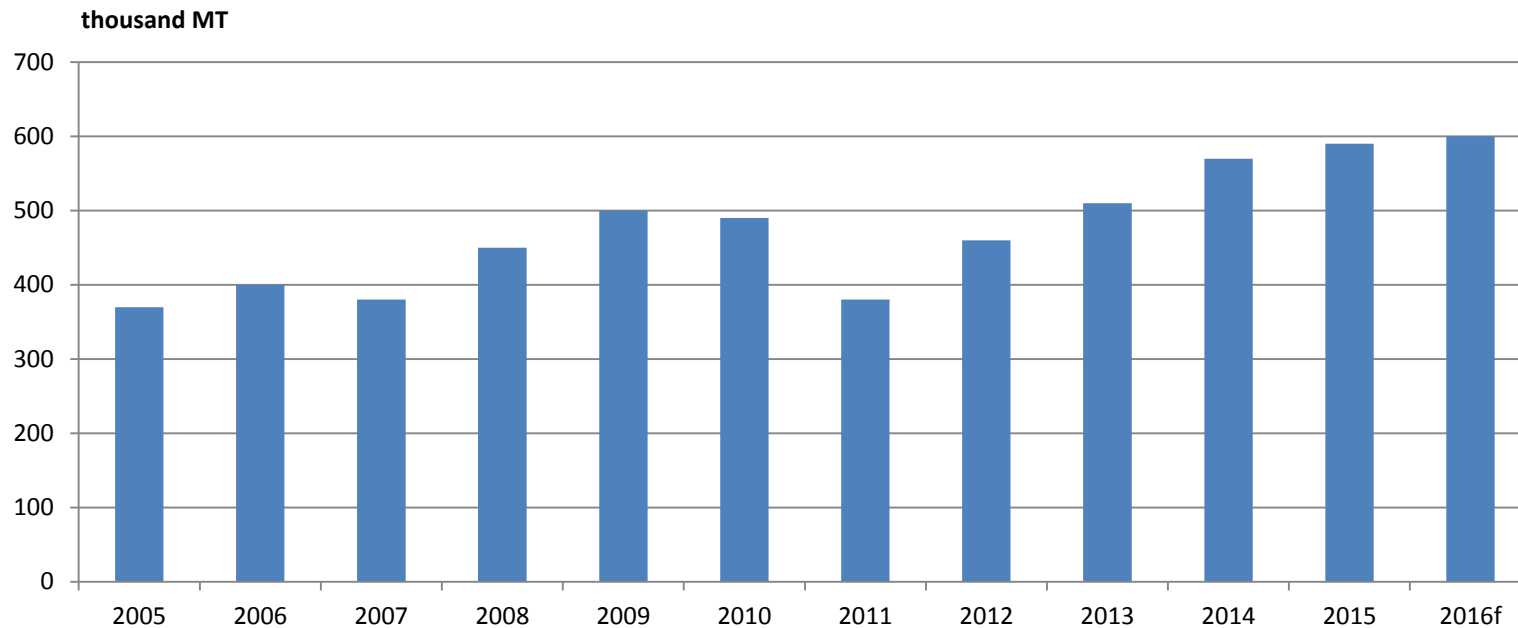
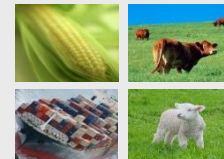
Conclusions

- **Cattle herd will continue growing at least at 6% annually for the next 5 years.**
- **US beef market shall continue been of great importance and should represent 49% of our total exports. Once the US importers start buying our cuts besides grinding beef, this would easily increase to 65%.**
- **80% of the US “Others Quote” is used only by Nicaragua.**
- **Since DR-CAFTA signature there are 4.5 more years to reach 100% free trade.**



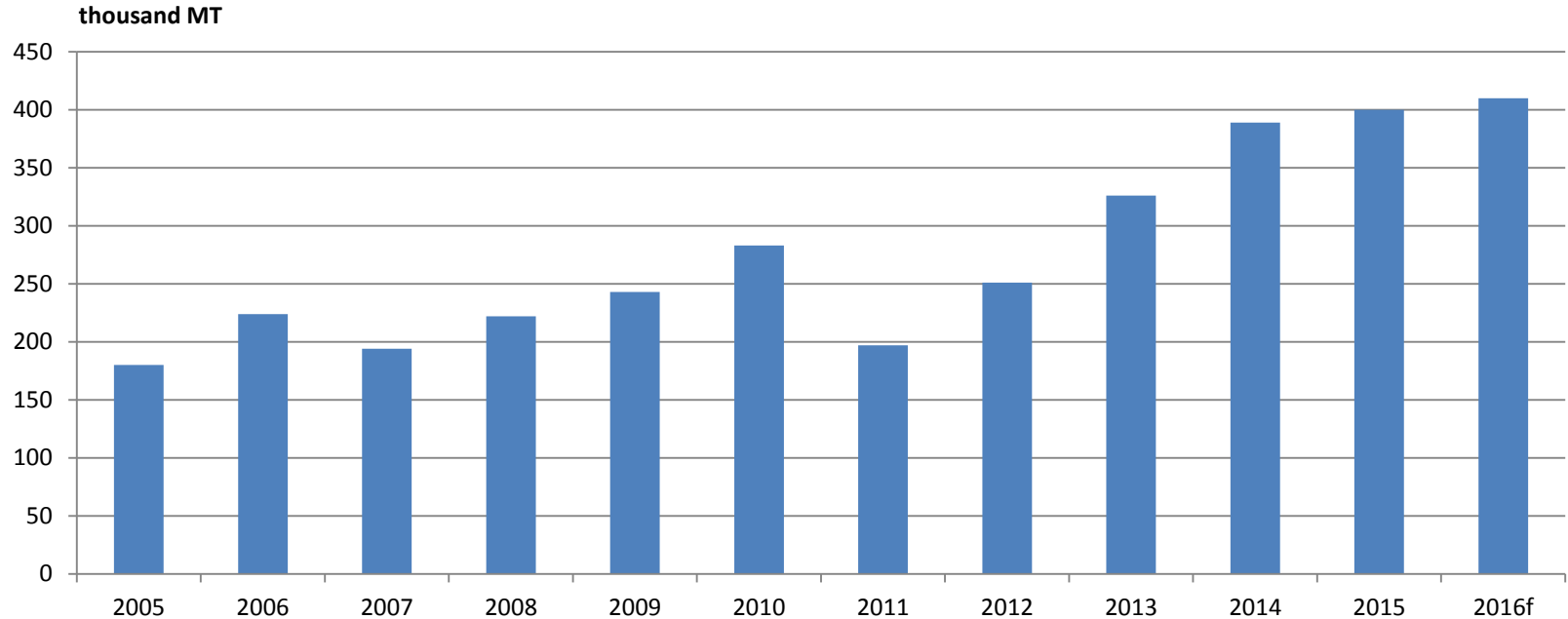
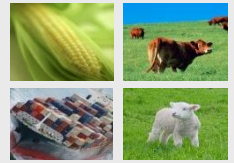
Paraguay

Paraguay Beef Production

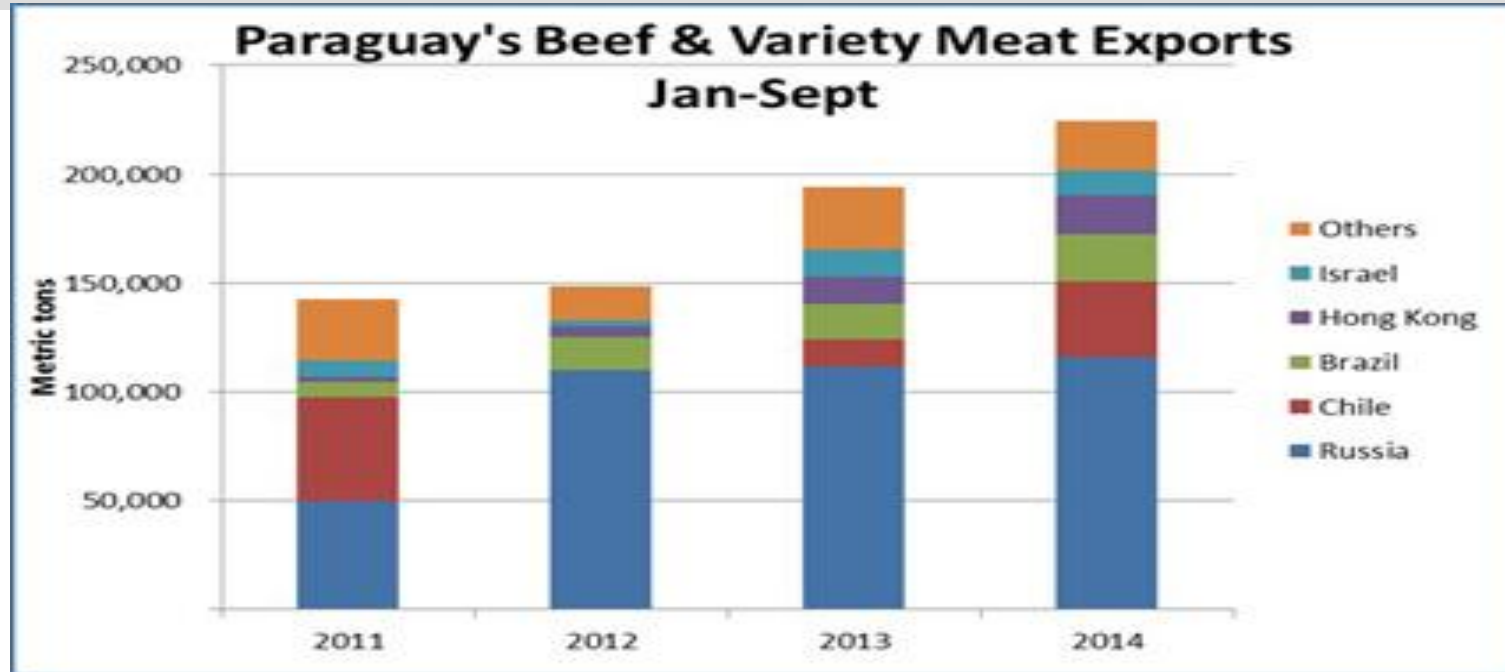
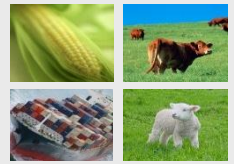


Source: USDA FAS GAIN Reports

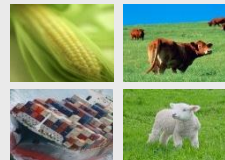
Paraguay Beef Exports



Source: USDA FAS GAIN Reports



Source: USMEF Report



Lamb

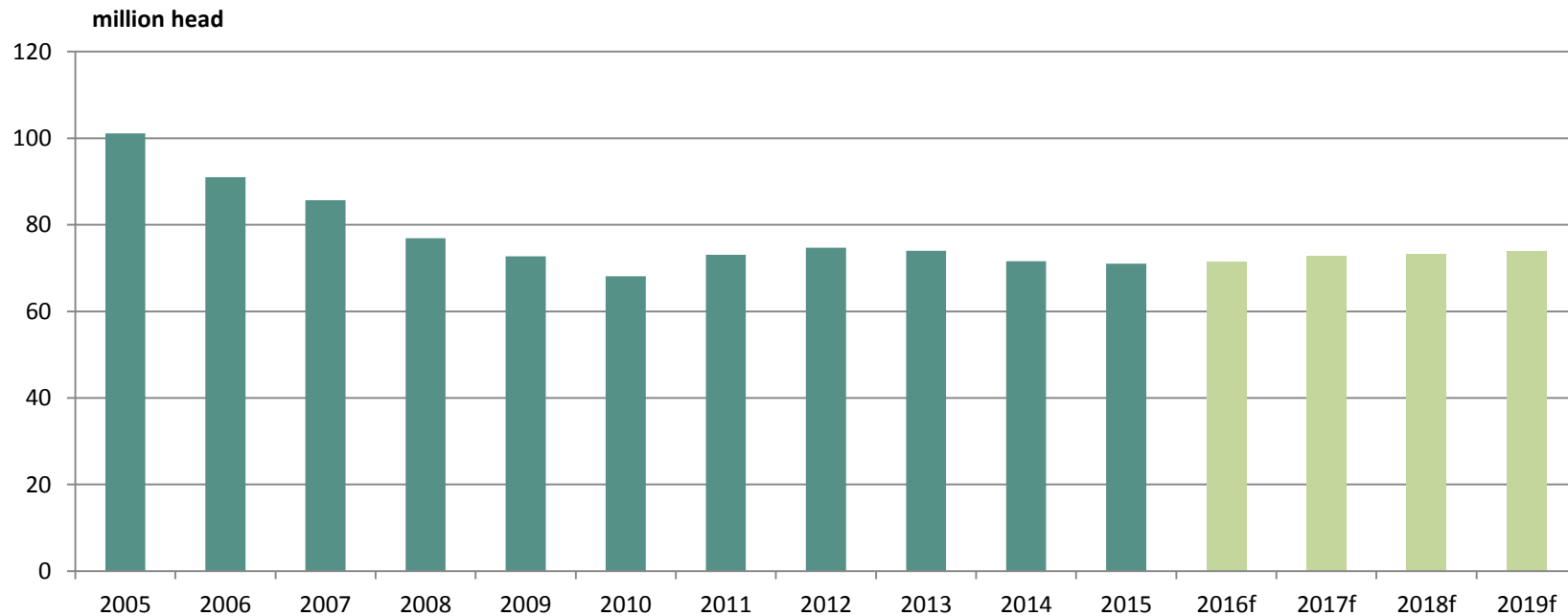
**Australia & New Zealand Dominate
Trade**

AUSTRALIA

MLA PRESENTATION TO MICA CONFERENCE



SHEEP NUMBERS STABILISING

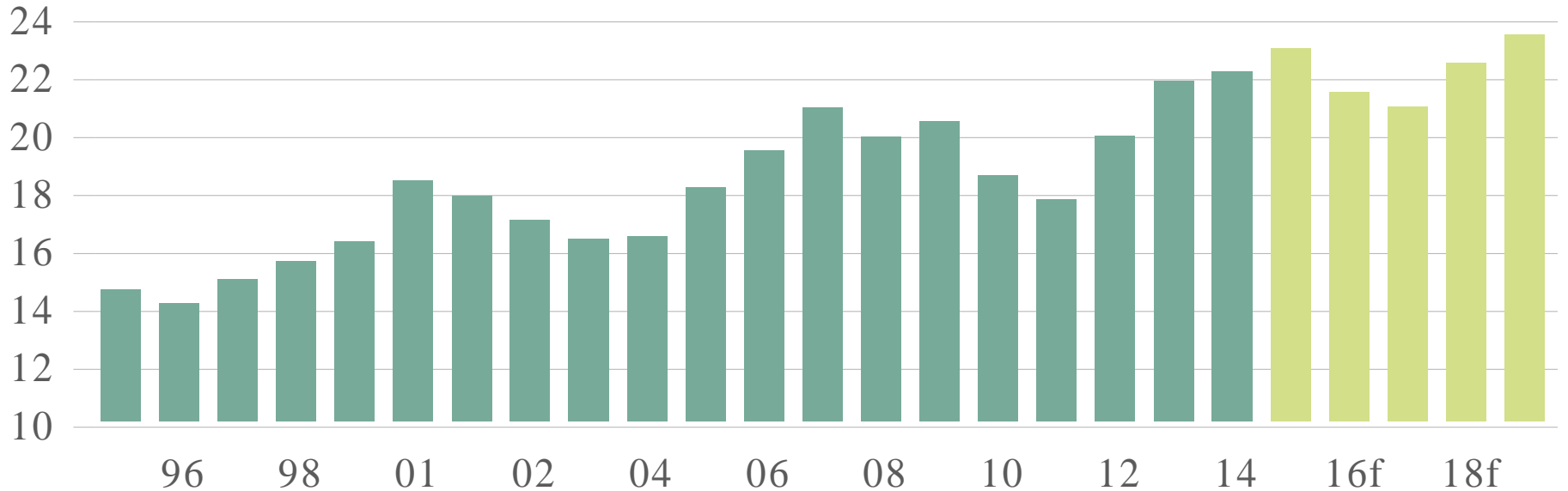


Source: ABS, MLA Forecasts



HISTORICALLY HIGH LAMB TURN-OFF, LOWER PRODUCTION IN 2016

million head

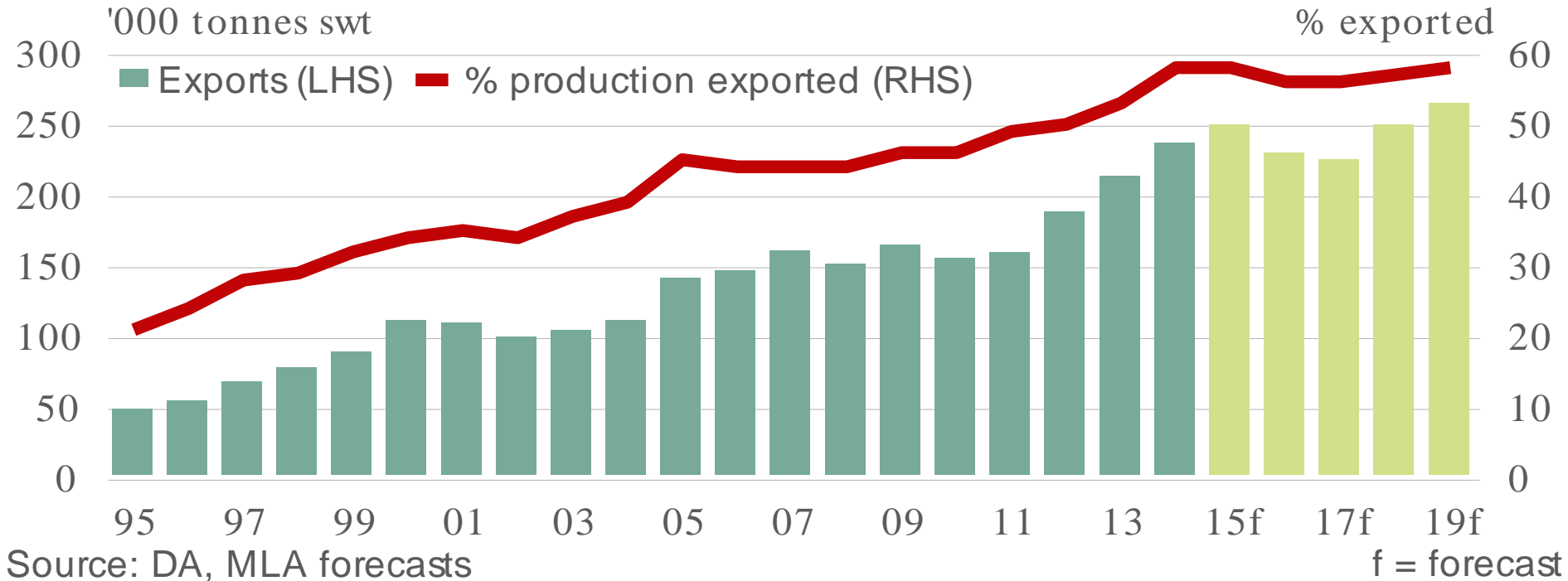


Source: ABS, MLA forecasts

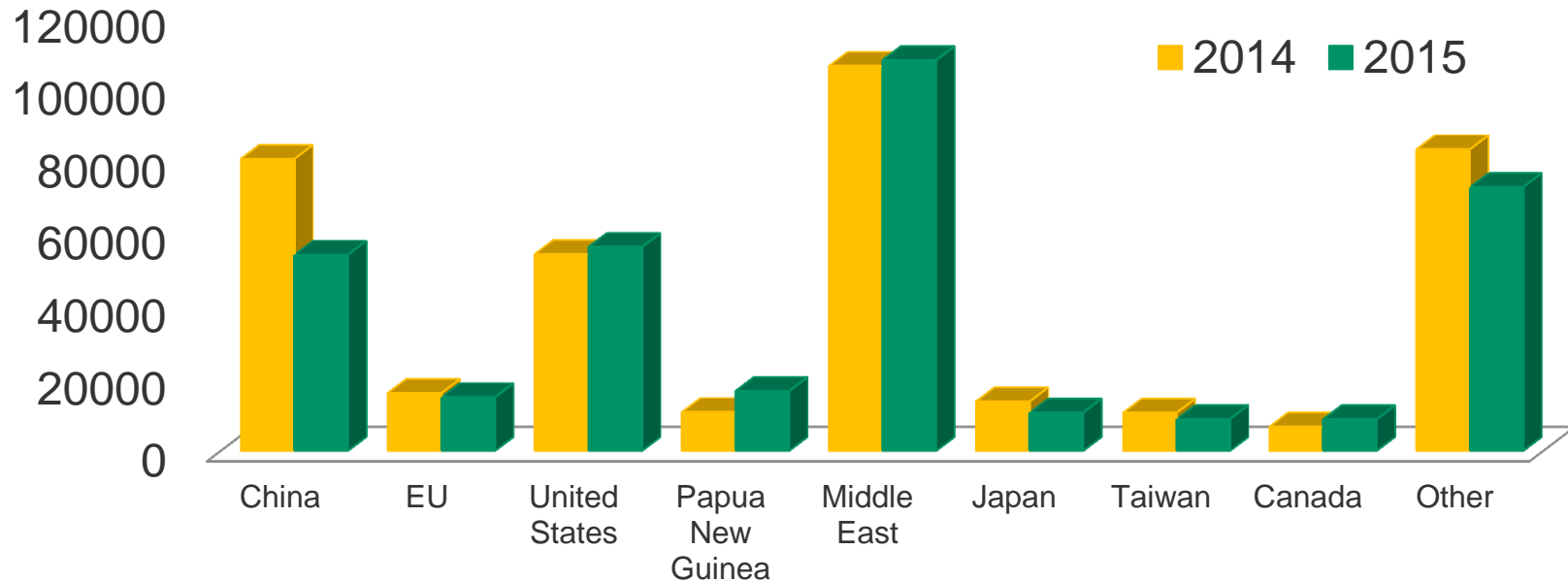
f = forecast



LARGEST SUPPLY DROP FORECAST ON THE AUSTRALIAN MARKET



MIDDLE EAST, US AND CHINA DOMINATE MARKET SHARE*



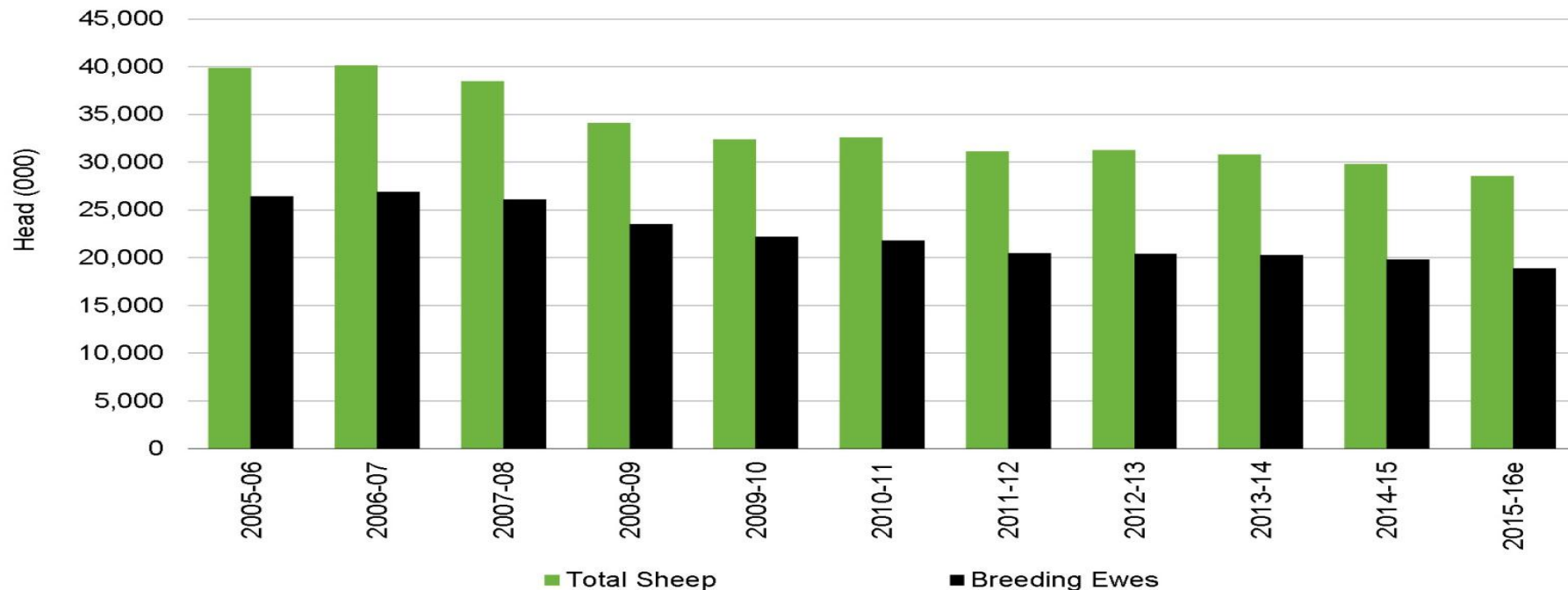
* Jan-Nov volumes Source: DA



New Zealand

Total Sheep

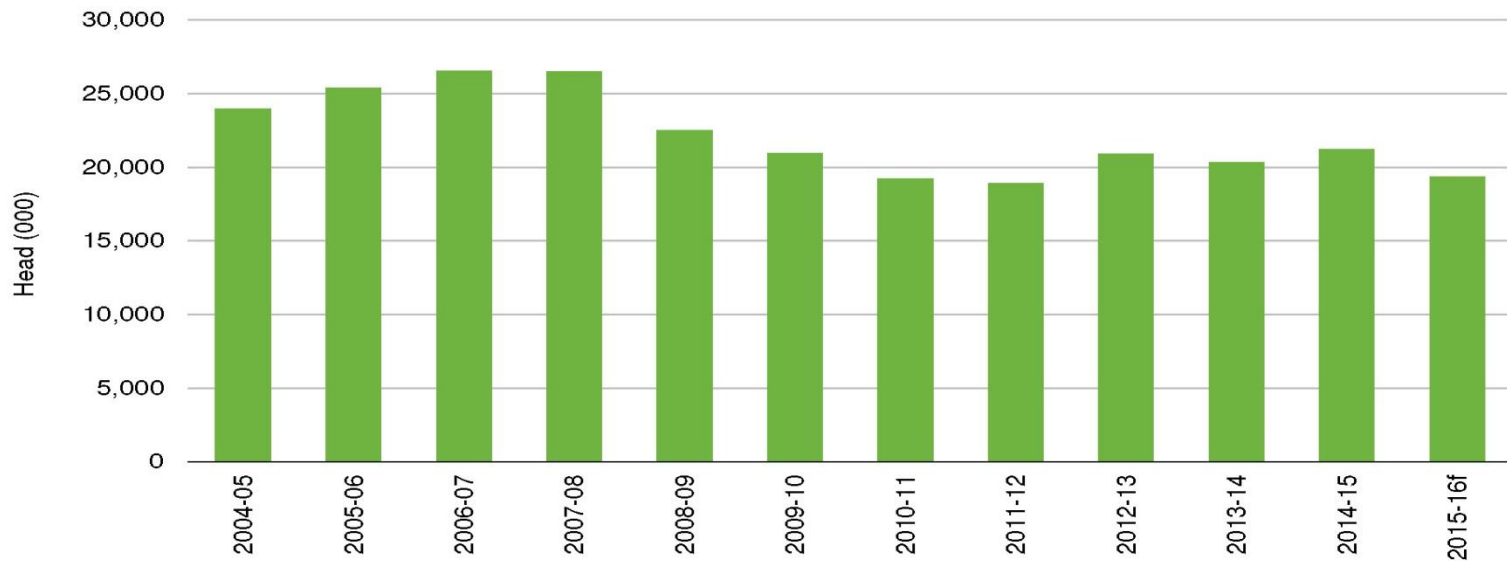
New Zealand - Year Ending June



Source: Beef + Lamb New Zealand Economic Service | Statistics New Zealand

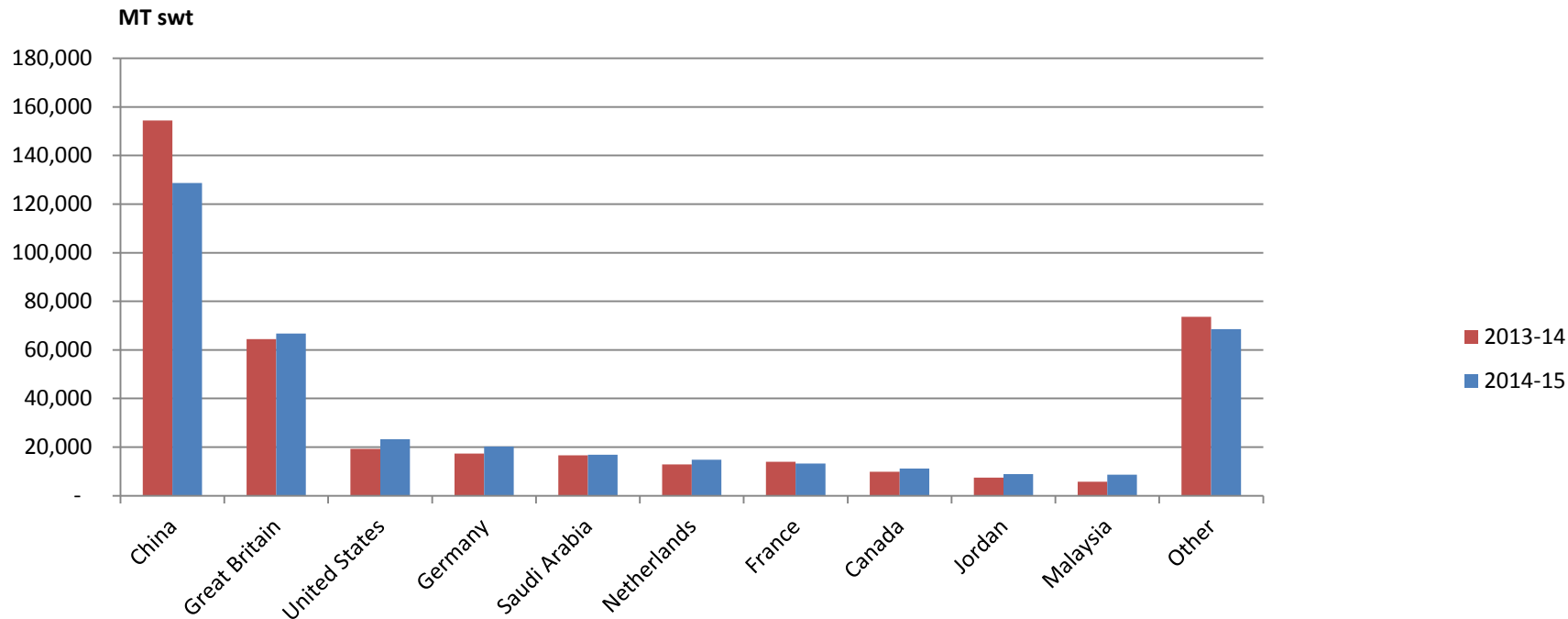
Export Lamb Slaughter

New Zealand - Year Ending September



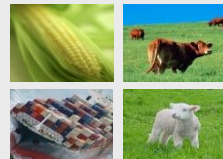
Source: Beef + Lamb New Zealand Economic Service | Statistics New Zealand

NZ Sheepmeat Exports By Country



Source: Beef+Lamb NZ

2016?



❖ Beef

- Brazil and Argentina finally gain access to US market?
- US gains access to China?

❖ Lamb

- Small animal rule published?
- Opportunities for lamb exports to US