



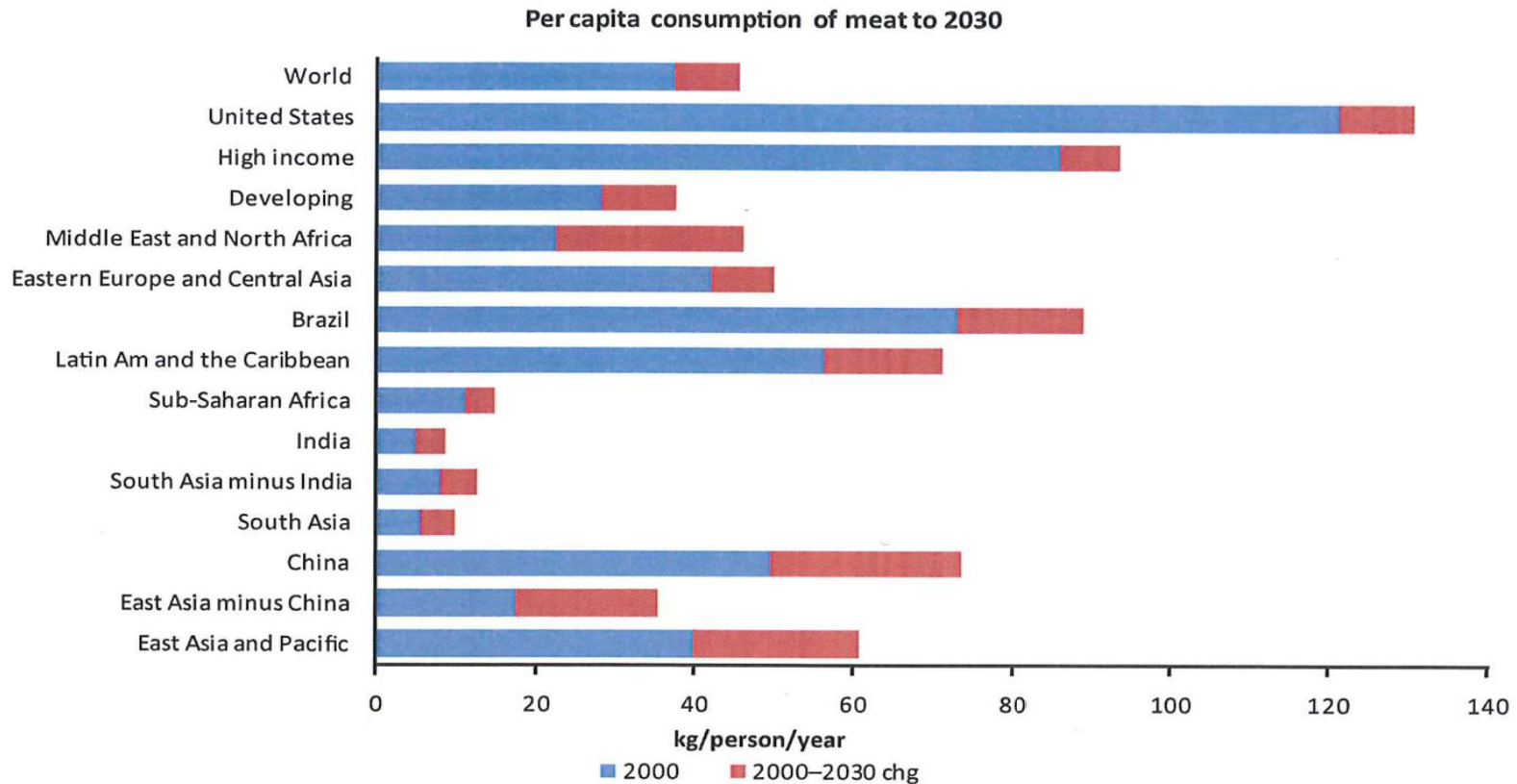
# **2011 IUF Global Meat Conference**

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# Growth in Global Demand

Figure 2—Growth in per capita meat consumption to 2030

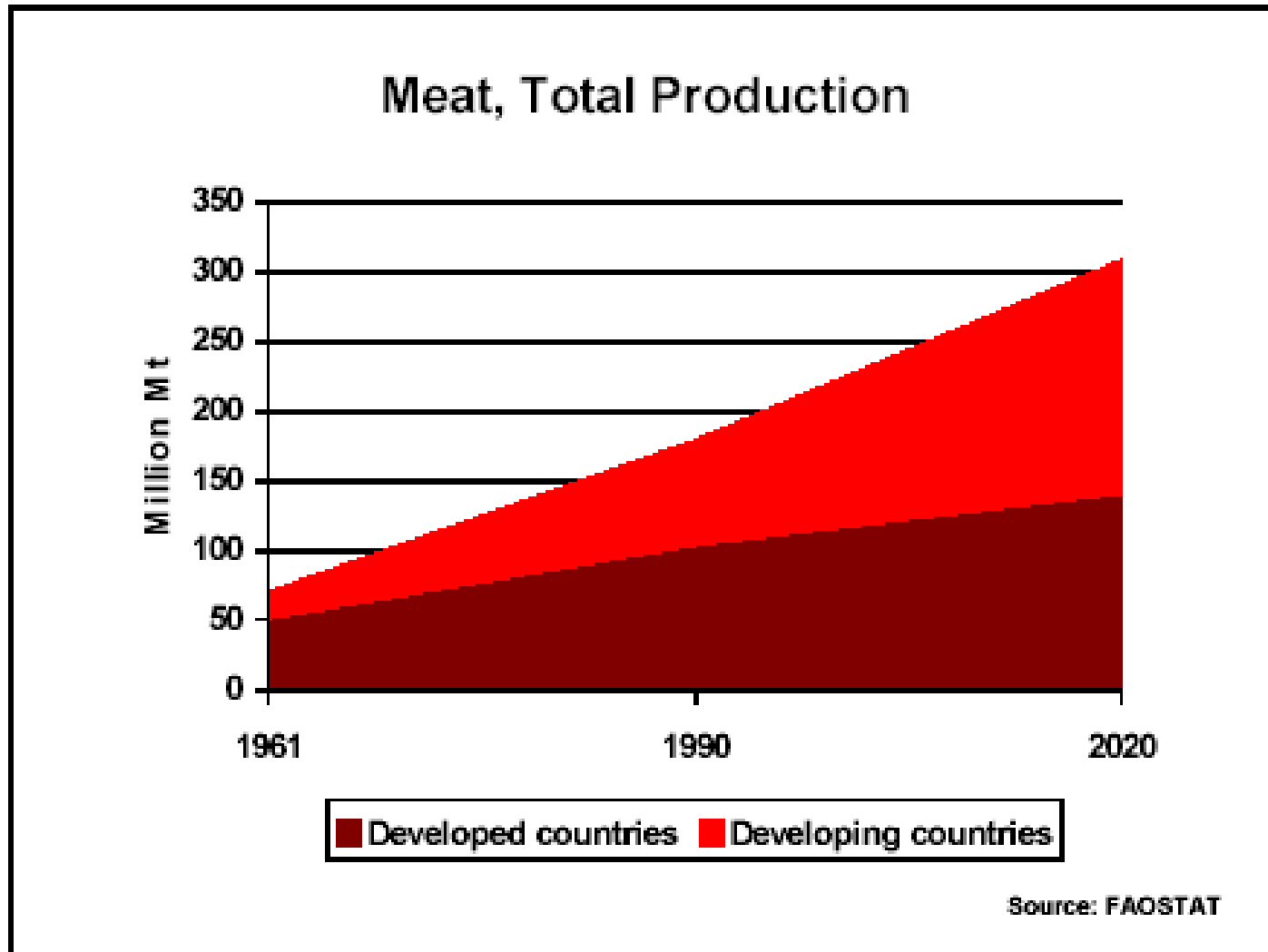


Source: IMPACT model projections



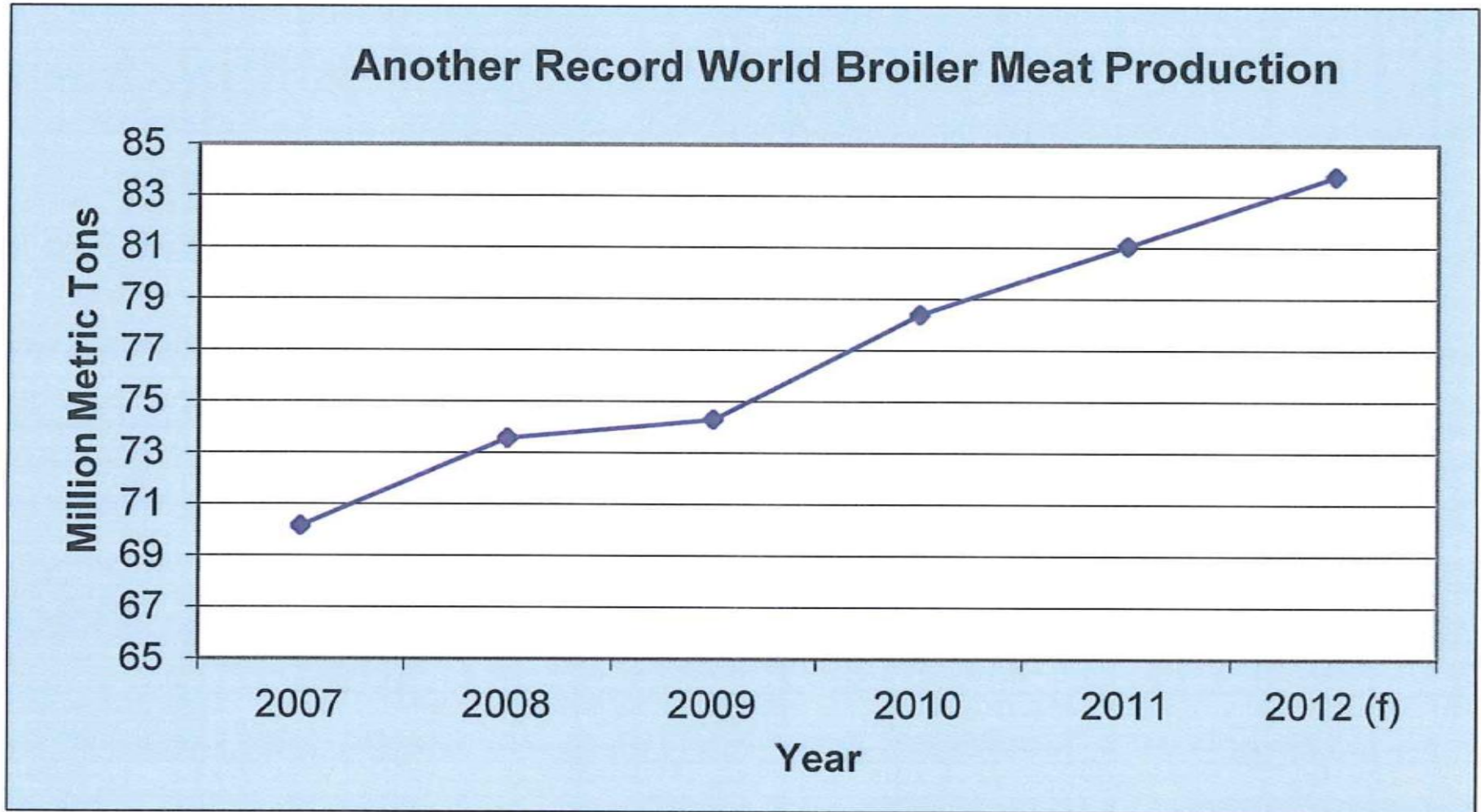
# Growth in Global Production

From 233 million tonnes (2000) to 300 million tonnes (2020)



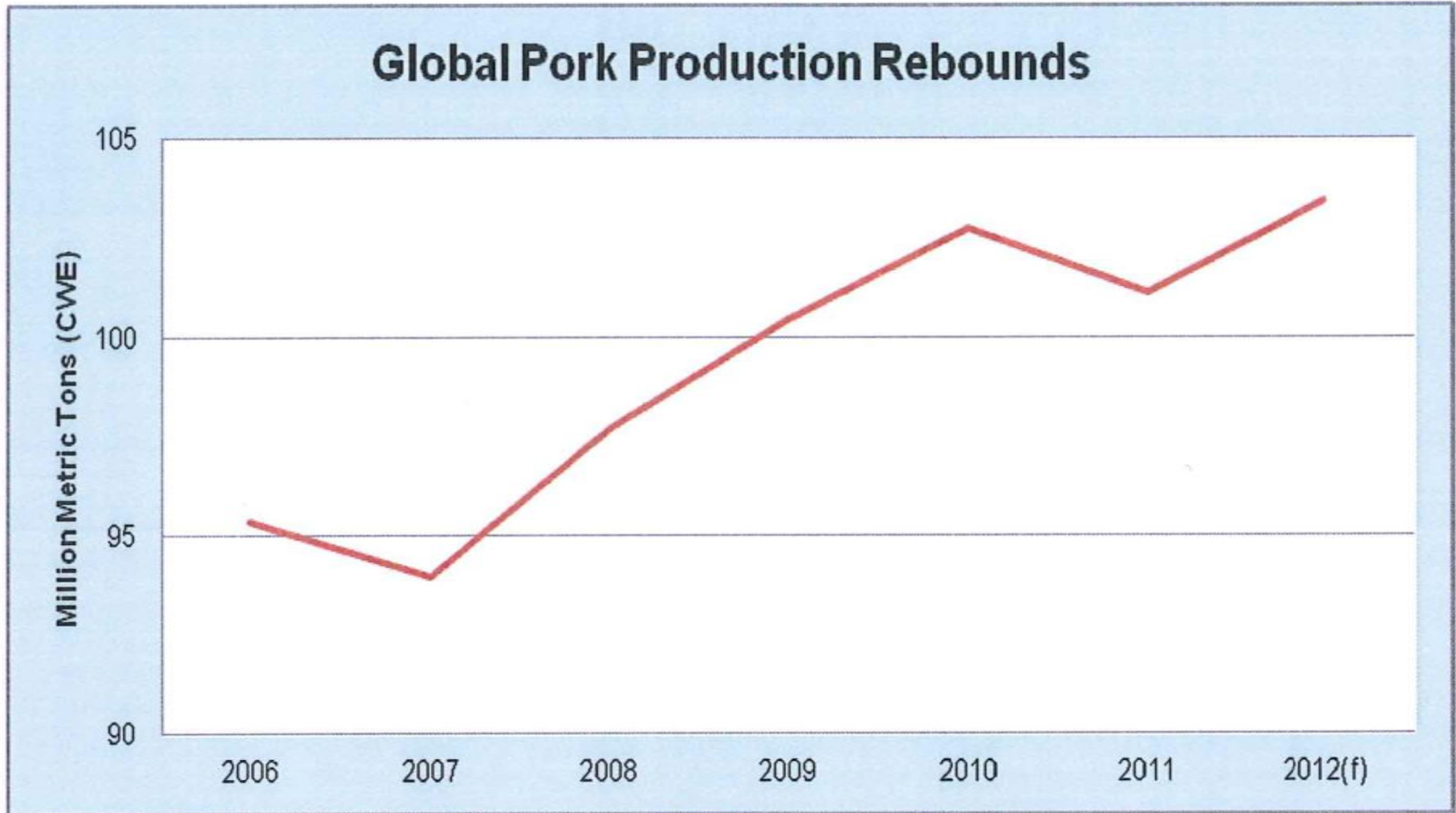


# Growth in Global Production





# Growth in Global Production



# World Meat Production and Demand

## Beef—Top Producers

	2006	2007	2008	2009	2010
<b>U.S.</b>	11,980	12,097	12,163	11,891	11,828
<b>Brazil</b>	9,025	9,303	9,024	8,935	9,145
<b>EU-27</b>	8,150	8,188	8,090	7,900	7,870
<b>China</b>	5,767	6,134	6,132	5,764	5,550
<b>India</b>	2,375	2,413	2,650	2,750	2,850

## Beef—Top Consumers

	2006	2007	2008	2009	2010
<b>U.S.</b>	12,833	12,830	12,452	12,239	11,932
<b>EU-27</b>	8,649	8,690	8,352	8,249	8,200
<b>Brazil</b>	6,969	7,144	7,252	7,374	7,510
<b>China</b>	5,692	6,065	6,080	5,749	5,528
<b>Argentina</b>	2,553	2,771	2,731	2,722	2,303

## Pork—Top Producers

	2006	2007	2008	2009	2010
<b>China</b>	46,505	42,878	46,205	48,905	50,000
<b>EU-27</b>	21,791	22,858	22,596	22,159	22,250
<b>U.S.</b>	9,559	9,962	10,599	10,442	10,052
<b>Brazil</b>	2,830	2,990	3,015	3,130	3,170
<b>Russia</b>	1,805	1,910	2,060	2,205	2,270

## Pork—Top Consumers

	2006	2007	2008	2009	2010
<b>China</b>	46,014	42,710	46,691	48,823	50,050
<b>EU-27</b>	20,631	21,507	21,024	20,782	20,580
<b>U.S.</b>	8,643	8,965	8,806	9,013	8,428
<b>Russian</b>	2,639	2,803	3,112	3,049	3,119
<b>Brazil</b>	2,191	2,260	2,390	2,423	2,545

## Poultry—Top Producers

	2006	2007	2008	2009	2010
<b>U.S.</b>	15,930	16,226	16,561	15,935	16,348
<b>China</b>	10,350	11,291	11,840	12,100	12,550
<b>Brazil</b>	9,355	10,305	11,033	11,023	11,420
<b>EU-27</b>	7,740	8,320	8,594	8,756	8,920
<b>Mexico</b>	2,592	2,683	2,853	2,781	2,809

## Poultry—Top Consumers

	2006	2007	2008	2009	2010
<b>U.S.</b>	13,671	13,582	13,428	12,940	13,426
<b>China</b>	10,371	11,415	11,954	12,210	12,496
<b>EU-27</b>	7,656	8,358	8,564	8,692	8,760
<b>Brazil</b>	6,853	7,384	7,792	7,802	8,071
<b>Mexico</b>	3,010	3,061	3,281	3,264	3,324



# Production and Consumption Trends

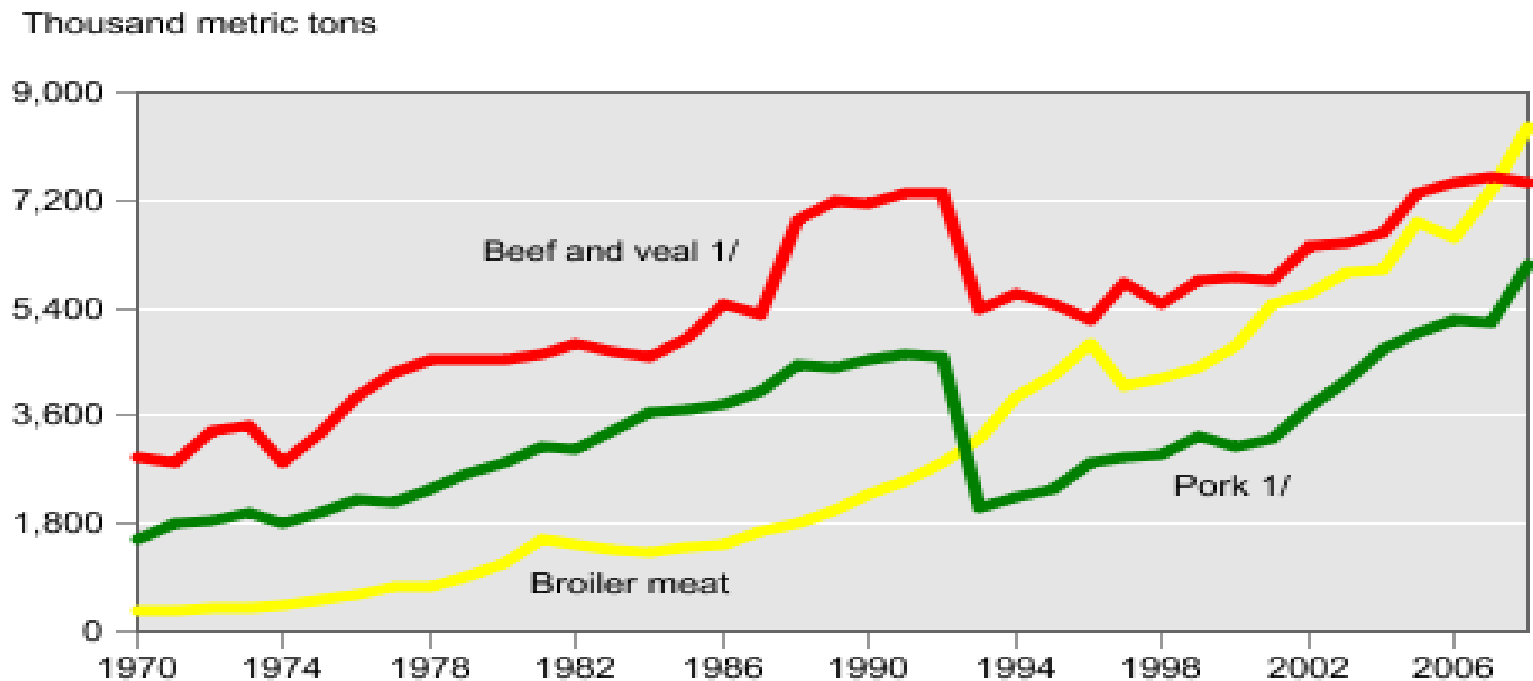
## World meat production and consumption in metric tons

2009	2010	2009	2010
<b>World beef production</b>		<b>World beef consumption</b>	
57,356,000	57,323,000	56,668,000	56,544,000
<b>World pork production</b>		<b>World pork consumption</b>	
100,399,000	103,223,000	100,268,000	102,953,000
<b>World poultry production</b>		<b>World poultry consumption</b>	
72,293,000	75,991,000	71,860,000	75,127,000



# Growth in Global Trade

## Total world meat exports, 1970-2008



1/ Carcass-weight equivalent.

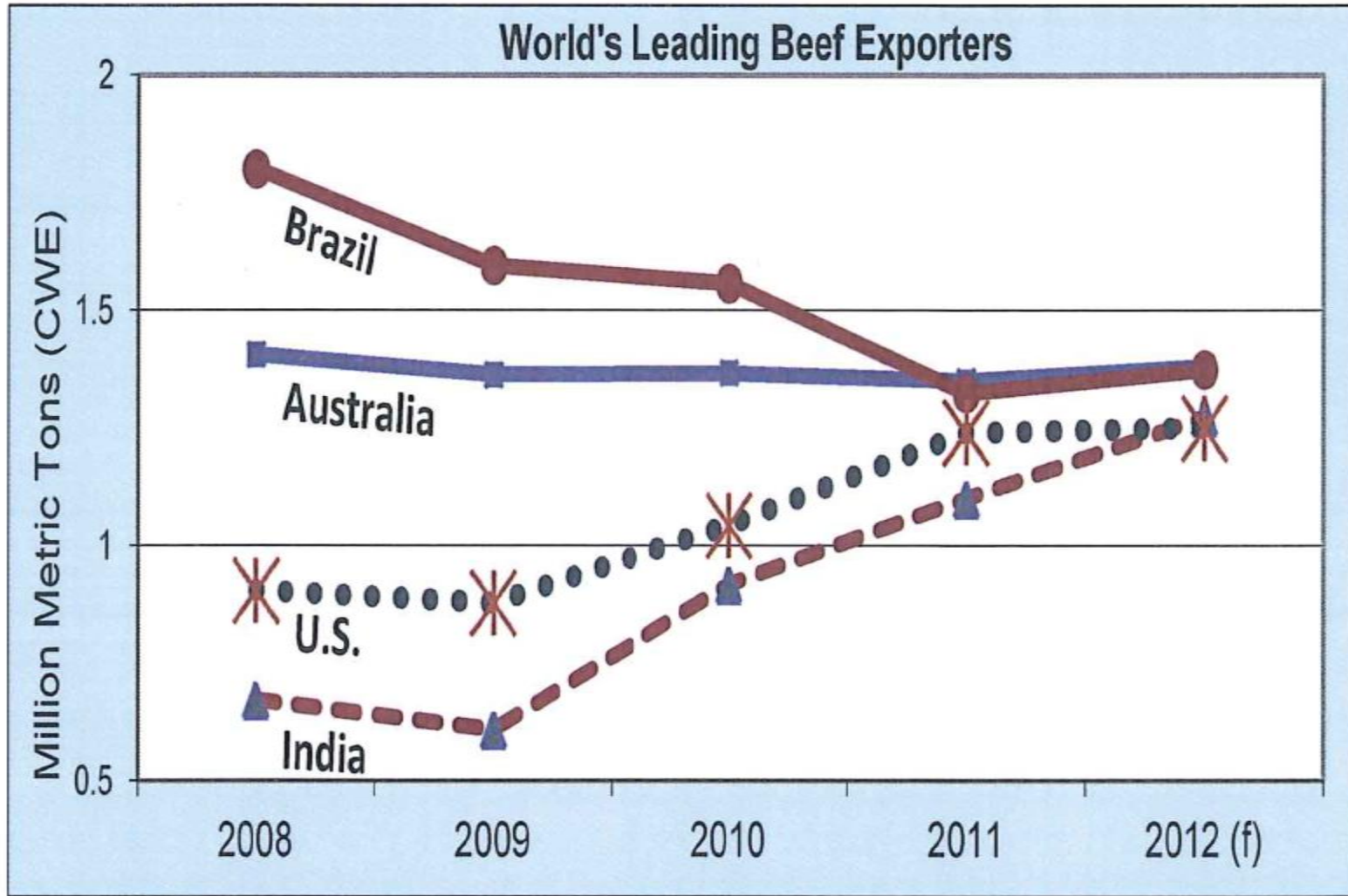
Source: USDA, Foreign Agricultural Service, Production, Supply, and Distribution database.







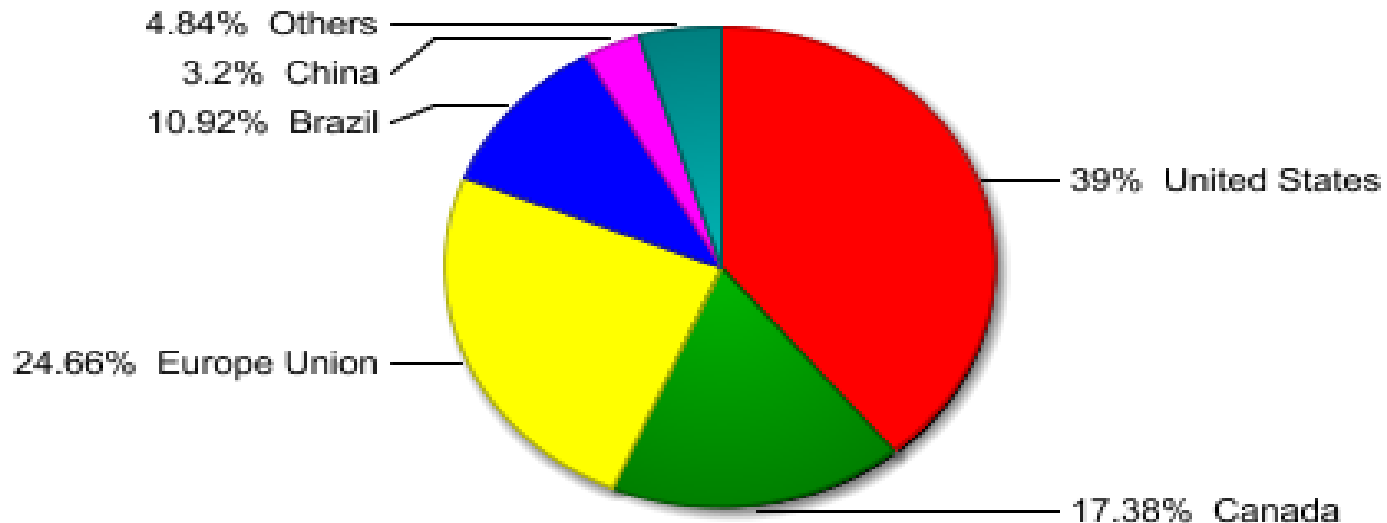
# Growth in Global Trade





# Growth in Global Trade

Country shares of world pork exports, 2008



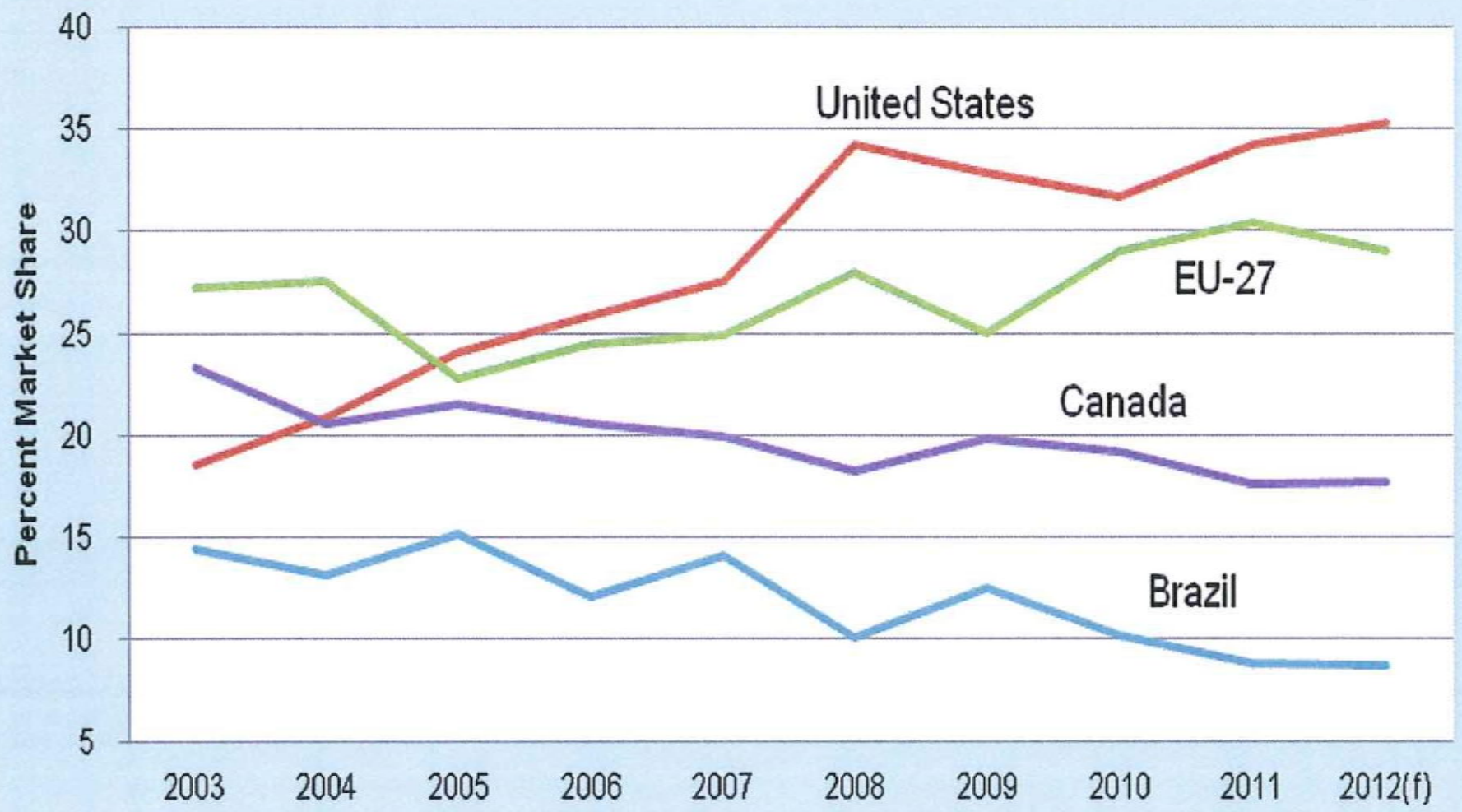
Source: USDA, Economic Research Service using data from USDA, Foreign Agricultural Service, Production, Supply, and Distribution (PS&D) database.





# Growth in Global Trade

## U.S. Builds Its Pork Export Market Share





# Top 10 Meat Companies

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- 1. JBS**
- 2. Tyson Foods**
- 3. Cargill**
- 4. Vion**
- 5. Smithfield Foods**
- 6. Marfrig Group**
- 7. Nippon Meat**
- 8. Danish Crown**
- 9. Brasil Foods**
- 10. Hormel Foods**



# Industry Consolidation

## Latest major acquisitions (2009-2011)

- 2008 Dutch **Vion** acquires UK's **Grampian Country Farms**
- Brazilian **JBS** acquires 64% of Texas-based **Pilgrim's Pride** 2009, and Australia's **Tatiara Meat Company** and **Rockdale Beef** 2010.
- Brazilian **Marfrig** acquires the Brazilian turkey segment from **Doux Frangosul** 2009 and **Seara Alimentos** from **Cargill** 2010
- 2011 **Brasil Foods** is created through the merger of **Perdigão** and **Sadia**; acquires majority stake in Argentinean **Avex**