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Livestock and Products

Poor Feed Situation Hampers Sector in Early 2004 2004

Approved by:

Allan Mustard
U.S. Embassy

Prepared by:

Mark Petry and Mikhail Maximenko

Report Highlights:

A deteriorating feed situation following the 2003 grain harvest is forecast to increase slaughter rates and decrease the beef and swine herds in 2004 compared to previous expectations. The grain situation will hold down swine industry growth for the short term, while prolonging the downward spiral of beef production. Russian imports in 2004 will also be higher than previously forecast due to increased Ukrainian beef exports and slightly higher tariff rate quotas (TRQs) on beef and pork.

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Executive Summary

A deteriorating feed situation following the 2003 grain harvest is forecast to increase slaughter rates and decrease the beef and swine herds in Russia compared to previous expectations. Beginning stocks and the pig/calf crop were also both lowered from previous forecasts. The grain situation is expected to hold down what had been consistent growth in the swine industry. Additionally, instead of possibly reaching a production floor, the beef industry is heading for further decline. Russian imports in 2004 will also be higher than previously forecast due to higher Ukrainian beef exports and slightly higher tariff rate quotas (TRQs) on beef and pork. Higher imports will permit slight growth, though less than in a free market, in consumption in 2004.

Production

Unfortunately, the difficult feed situation will force an even larger drop in the forecast cattle herd in 2003 and 2004. Cattle ending inventories in both years were reduced from the previous forecasts. Similarly, the forecast calf crop in Russia in 2004 was reduced from the previous forecast and is set at six percent lower than 2003. Despite the higher slaughter rate, production forecasts for 2003 and 2004 were both lowered due to the decrease in slaughter weights.

The Russian swine herd is forecast to begin 2004 at roughly 17.2 million head, a three percent decline from the previous forecast. The 2004 pig crop and slaughter are also expected to be lower than previously forecast due to the worsening feed situation. The feed situation caused producers to increase slaughter rates in late 2003, which led to an increase in the estimated pork production in 2003 and to the reduced 2004 pig crop. However, a return to normal feed production in 2004 should herald a stabilization of the swine herd and a rise in swine ending stocks going into 2005.

There are 120 historic pork producers in Russia, which had a total swine herd of 2.58 million pigs in 2003. These producers actually have capacity to raise 7.5 million head. To illustrate the excess capacity still existing in the industry, only seven farms are currently utilizing their capacity in full, 20 plants are at 50 percent capacity, and 52 plants are at less than 50 percent capacity. Forty-one of these farms were out of operation in 2003.

Feed Supplies

The low 2003 grain harvest, increased grain export volumes, and increased feed consumption by some livestock producers created feed shortages in the Russian Federation at the end of 2003 that will continue through the first half of 2004. The price of one metric ton of feed wheat has reached about \$160, barley \$130, and corn \$175. The data presented in Table 1 shows significant feed stock reduction in 2003 in comparison with 2002. However, despite the very high prices, the feed price effect has been mitigated to some degree by the very high profitability (per kilo of meat) of leading producers, increasing efficiency of feed utilization, and that small farmers use non-traditional feeds and/or feed not accounted for by national statistics. Nonetheless, producers are experiencing difficulties in obtaining the volume and quality of grain (mostly wheat) necessary in some regions due to the poor inter-regional transportation of grains. Artificial administrative or other barriers to free transit of grain inside Russia have forced many producers to shift from the traditional predominately wheat ration to other components, including imported soy and other feed ingredients. While cattle depend on grain to a lesser degree than swine, the feed shortage is more severe for these producers because of the very weak financial situation of such a large portion of the industry.

Table 1. Available Feed at Agricultural Organizations in December 2002 and 2003.

	2003	2002
Available feeds, million tons feed units	24.1	29.1
Including grain feeds	6.9	9.2
Tons of feed units per one standard animal	1.34	1.48

Source: Russian State Statistics Committee

Consumption

In 2004, the forecast for consumption of beef and pork was increased slightly. In both cases, higher forecast imports are expected to more than make up for production fluctuations. Consumption right now is constrained in all meat categories by the TRQs. While pork and poultry are most constrained, Ukraine acts as a safety valve for beef because it is not inside the TRQ and has significant exportable supplies.

Prices

Higher rates of pig and cattle slaughter due to winter feed constraints will prevent prices from moving higher in the winter of 2003. Higher beef and pork TRQ volumes announced for 2004 will also have a dampening effect on prices. (See GAIN report #RS3050) Prices are expected to continue rising in the spring and throughout the rest of 2004 unless another poor harvest forces high slaughter rates to continue throughout the fall and winter of 2004.

Table 2. Wholesale Prices (Offer Price), January – January 2004.

Date	Exchange rate, ruble/\$	Domestic beef	Imported beef	Domestic pork	Imported pork
01/30/2003	31.80	50.17	48.40	48.75	45.50
02/28/2003	31.57	51.17	49.95	44.75	46.14
03/30/2003	31.38	48.67	48.01	40.37	44.90
04/30/2003	31.10	48.00	46.35	40.25	44.62
05/30/2003	30.66	48.00	48.52	41.02	48.45
06/30/2003	30.34	47.00	49.45	42.51	49.00
07/30/2003	30.24	49.00	49.30	42.39	49.11
08/30/2003	30.50	49.00	49.57	43.50	51.83
09/30/2003	30.61	58.00	52.75	51.33	61.60
10/30/2003	29.82	51.17	54.81	52.00	60.93
11/30/2003	29.74	52.38	52.31	50.75	55.53
12/30/2003	29.25	51.00	54.96	52.50	53.89
01/30/2004	28.48	64.42	63.61	54.63	54.81

Source: Russian Institute for Agricultural Market Studies (IKAR)
Prices are in rubles per kilogram.

Trade

The 2004 Russian import forecasts for beef and pork were both revised upward due to the announcement of slightly larger than expected TRQs for 2004. (Note: The basis for the

previous 2004 forecast was a pro rated 2003 TRQ.) This move implies that the Russian Government acknowledged that the relative 2003 TRQ volume would not have allowed consumption growth in 2004. The beef estimate for 2003 was also increased because of stronger than expected beef imports from Ukraine. Ukraine is also an important factor in the 2004 import picture due to the high rate of slaughter in Ukraine due to a similar feed grain shortage. It is expected that Russia will be able to absorb any beef that Ukraine is able to export in 2004 due to the price advantage that Ukrainian beef receives from a zero tariff, being excluded from the TRQ, and strong Russian demand.

Table 3. Russian Beef Imports, 2001-2002, January – October 2003.

		2003												
Quantity (MT)		2001	2002	Jan.	Feb.	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	YTD
0202	BEEF, FROZEN	420,844	469,141	24,855	29,410	58,596	19,986	22,650	35,307	40,463	40,563	49,219	48,494	369,542
020230	CUTS BONELESS	232,297	325,928	17,579	23,585	52,045	12,551	15,709	24,976	30,614	33,473	39,935	37,883	288,350
020210	CARCASS,WHOLE/HALF	73,265	96,397	5,022	5,302	5,215	6,982	6,737	9,413	9,841	6,638	8,849	9,338	73,336
020220	CUTS WITH BONE	115,283	46,816	2,254	523	1,336	453	203	918	9	451	435	1,274	7,857
0201	BEEF FRESH, CHILLED	34,671	35,459	898	973	1,445	85	200	297	981	196	510	1,608	7,193
020130	CUTS BONELESS	12,094	34,212	898	973	1,444	43	174	269	963	196	510	1,608	7,078
020120	CUTS WITH BONE	22,525	1,229	0	0	0	42	26	28	18	0	0	0	115
020110	CARCASS,WHOLE/HALF	53	18	0	0	0	0	0	0	0	0	0	0	0

Source: World Trade Atlas

Table 4. Russian Pork Imports By Country of Origin, 2001-2002, January – October 2003.

		2003												
PORK,FR./FR. Qty. (MT)		2001	2002	Jan.	Feb.	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	YTD
0203	1 Brazil	140,766	349,799	30,034	21,801	36,703	5,947	17,078	29,414	25,842	27,656	35,162	29,461	259,099
	2 Poland	22,042	17,153	3,368	5,373	13,966	3,082	3,035	5,457	3,474	5,091	7,149	8,807	58,802
	3 China	10,347	67,519	3,089	3,979	10,899	4,520	874	3,042	3,514	2,062	1,377	1,375	34,729
	4 Germany	25,637	29,652	818	1,218	3,546	557	1,073	703	1,071	988	1,059	1,019	12,051
	5 Ukraine	1,504	1,069	324	826	1,033	1,232	1,155	2,210	889	159	302	933	9,062
	6 Denmark	55,479	41,437	1,737	2,156	4,778	18	762	2,021	1,967	928	1,388	914	16,669
	7 France	15,675	16,301	641	434	1,570	20	258	750	818	404	514	405	5,812
	8 Finland	3,278	7,567	360	799	1,543	301	763	644	733	299	594	338	6,373
	9 Netherlands	4,411	7,644	204	460	661	20	184	283	206	250	425	267	2,961
	10 Canada	24,742	26,446	2,302	2,112	3,054	276	362	2,298	1,161	450	225	225	12,464

Source: World Trade Atlas

Policy

The measures taken by the Russian Government to protect the interests of domestic producers in 2003 created a lot of logistical complications for importers and exporters. Namely, it is difficult for importers to get through the complicated system of regulations and procedures prepared in the rush to initiate the TRQs. Obtaining an import license from MEDT and import permit from Ministry of Agriculture remains a time consuming and onerous problem. Moreover, new importers are now effectively barred from participating in the trade of beef and pork and supply problems are being encountered by firms that need to find additional import volumes but cannot increase their share of the licenses.

Table 5. Russian Pork Imports - Market Share of Major Exporters, 2001-2002, January – October 2003.

0203	Mkt. Share (% of Qty.)	2001	2002	Jan.	Feb.	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	YTD
1	Brazil	38.3%	58.1%	68.4%	53.3%	45.2%	35.2%	64.7%	61.2%	63.6%	70.7%	71.8%	66.0%	60.2%
2	Poland	6.0%	2.8%	7.7%	13.1%	17.2%	18.2%	11.5%	11.4%	8.5%	13.0%	14.6%	19.7%	13.7%
3	China	2.8%	11.2%	7.0%	9.7%	13.4%	26.7%	3.3%	6.3%	8.6%	5.3%	2.8%	3.1%	8.1%
4	Germany	7.0%	4.9%	1.9%	3.0%	4.4%	3.3%	4.1%	1.5%	2.6%	2.5%	2.2%	2.3%	2.8%
5	Ukraine	0.4%	0.2%	0.7%	2.0%	1.3%	7.3%	4.4%	4.6%	2.2%	0.4%	0.6%	2.1%	2.1%
6	Denmark	15.1%	6.9%	4.0%	5.3%	5.9%	0.1%	2.9%	4.2%	4.8%	2.4%	2.8%	2.0%	3.9%
7	France	4.3%	2.7%	1.5%	1.1%	1.9%	0.1%	1.0%	1.6%	2.0%	1.0%	1.0%	0.9%	1.3%
8	Finland	0.9%	1.3%	0.8%	2.0%	1.9%	1.8%	2.9%	1.3%	1.8%	0.8%	1.2%	0.8%	1.5%
9	Netherlands	1.2%	1.3%	0.5%	1.1%	0.8%	0.1%	0.7%	0.6%	0.5%	0.6%	0.9%	0.6%	0.7%
10	Canada	6.7%	4.4%	5.2%	5.2%	3.8%	1.6%	1.4%	4.8%	2.9%	1.1%	0.5%	0.5%	2.9%

Source: World Trade Atlas

The Russian government established the rules for 2004 beef and pork imports on November 29, 2003. The chilled beef resolution sets the TRQ at 27,500 MT. For 2004, the EU and future EU countries (Poland, the Czech Republic, Hungary, Slovakia, Slovenia, Lithuania, Latvia, Estonia, Cyprus and Malta) received 27,000 tons and other countries 500 tons. The frozen beef resolution sets the TRQ at 420,000 MT. The EU and future EU countries were allotted 331,800 tons, the United States 17,200 MT, Paraguay 3,000 MT, and other countries 68,000 tons. The pork resolution sets the TRQ at 450,000 MT. The EU and future EU countries will get 227,300 tons, the United States 42,200 MT, Paraguay 1,000 MT, and other countries 179,500 tons. Please reference GAIN Report RS3050 for the text of the beef and pork import TRQ resolutions and GAIN 3018 for additional details on the TRQs.

Table 6. Russian Beef Imports - Market Share of Major Exporters, 2001-2002, January – October 2003.

0202	Mkt. Share (% of Qty.)	2001	2002	Jan.	Feb.	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	YTD
1	Ukraine	21.4%	27.4%	29.3%	27.9%	14.8%	54.6%	50.2%	41.7%	38.3%	27.3%	28.4%	28.7%	31.3%
2	Brazil	0.5%	5.8%	24.2%	12.2%	30.9%	18.7%	8.9%	12.6%	6.8%	19.8%	23.2%	18.2%	18.7%
3	Ireland	7.2%	13.2%	12.3%	13.6%	9.6%	6.6%	12.9%	11.0%	11.6%	11.0%	12.0%	13.8%	11.5%
4	Spain	6.9%	6.8%	5.3%	9.2%	9.4%	4.1%	8.7%	9.7%	11.7%	11.6%	8.1%	8.6%	9.0%
5	Germany	39.9%	16.2%	7.5%	12.5%	11.3%	4.3%	6.7%	8.8%	10.0%	8.0%	8.2%	8.3%	8.9%
0201														
1	Germany	79.8%	90.8%	95.6%	93.0%	99.2%	22.5%	75.1%	75.7%	97.5%	75.1%	95.1%	87.0%	91.5%
2	Netherlands	0.9%	0.8%	2.2%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	7.4%	2.2%
3	Denmark	16.7%	4.2%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	1.2%
4	Belgium	0.7%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	6.6%	0.0%	0.0%	0.0%	1.2%	0.5%
5	United States	0.0%	0.0%	0.2%	0.2%	0.3%	2.7%	0.8%	0.002	0	0.007	0.001	0.002	0.2%

Source: World Trade Atlas

In particular, Brazilian suppliers were dissatisfied that there was no separate allotment on meat imports to Russia, but that its imports fall under the category "Other Countries." Following a visit by top Brazilian officials in January 2004, the Russian Government stated that it will consider submitting a proposal to allocate a separate allocation for Brazilian meat supplies to Russia, which may be subtracted from the "Other Countries" category.

PSD Table

Country Russian Federation	Commodity	Animal Number, Cattle	(1000 HEAD)				UOM
			2002 USDA Official [Old]	Revised Post Estimate [New] 01/2002	2003 USDA Official [Old]	Estimate Post Estimate [New] 01/2003	
Market Year Begin							MM/YYYY
	Total Cattle Beg. Stks	24510	24510	23500	23500	22345	22285 (1000 HEAD)
	Dairy Cows Beg. Stks	12200	12200	11700	11700	11000	10970 (1000 HEAD)
	Beef Cows Beg. Stks	0	0	0	0	0	0 (1000 HEAD)
	Production (Calf Crop)	9220	9220	8845	8845	8350	8330 (1000 HEAD)
	Intra EC Imports	0	0	0	0	0	0 (1000 HEAD)
	Total Imports	10	12	14	14	15	15 (1000 HEAD)
	TOTAL Imports	10	12	14	14	15	15 (1000 HEAD)
	TOTAL SUPPLY	33740	33742	32359	32359	30710	30630 (1000 HEAD)
	Intra EC Exports	0	0	0	0	0	0 (1000 HEAD)
	Total Exports	4	4	4	4	5	5 (1000 HEAD)
	TOTAL Exports	4	4	4	4	5	5 (1000 HEAD)
	Cow Slaughter	1800	1800	1700	1720	1620	1630 (1000 HEAD)
	Calf Slaughter	0	0	0	0	0	0 (1000 HEAD)
	Other Slaughter	8050	8050	7960	8000	7700	7750 (1000 HEAD)
	Total Slaughter	9850	9850	9660	9720	9320	9380 (1000 HEAD)
	Loss	386	388	350	350	250	250 (1000 HEAD)
	Ending Inventories	23500	23500	22345	22285	21135	20995 (1000 HEAD)

BSE and U.S. Exports

The overall Russian reaction to the detection of a BSE positive cow in the United States has been subdued. The media immediately announced the news of the BSE case in major newspapers, television, and on the Internet. News coverage was balanced and mainly relied on published (newswire) sources. Due to a swift public announcement of a ban by the Russian Ministry of Agriculture and the relatively small role of U.S. beef on the Russian market, the consumer reaction was hardly registered. In reaction to other BSE outbreaks, measures taken by the Ministry of Agriculture have reassured the public and Russia continues to import from countries with histories of BSE with certain restrictions based on the type of outbreak and a regionalization approach. For example, Russia only buys boneless beef from EU regions with a history of past BSE cases in addition to other safety guarantees.

In response to the U.S. BSE case, the Russian Federation banned all the following products, shipped after December 23: live cattle, beef, beef containing products, and feed, feed additives, collagen, and pet food of bovine or ruminant origin. The ban does not cover dairy products, milk, semen, hides, skins, or embryos.

Government Support to the Livestock Sector

As mentioned above, 2003 and 2004 will be difficult years for the livestock sector due to the grain shortage. However, the beef industry has been in decline (herd size and financially)

since the fall of the Soviet Union. Pork production, though growing for several years prior to 2003, is profitable among a relatively small group of companies. Livestock producers (though not processors) now stand out even more than the grain sector as in dire need of a coordinated policy approach. Russian policy specialists and political leaders have long recognized this, but are only now are ideas coalescing about the best way to construct and implement a coordinated strategy.

PSD Table

Country Commodity	Russian Federation						UOM
	Animal Numbers, Swine		(1000 HEAD)				
Market Year Begin	2002 USDA Official [Old]	Revised Post Estimate [New] 01/2002	2003 USDA Official [Old]	Estimate Post Estimate [New] 01/2003	2004 USDA Official [Old]	Forecast Post Estimate [New] 01/2004	MM/YYYY
TOTAL Beginning Stocks	16570	16570	17000	17000	17800	17200	(1000 HEAD)
Sow Beginning Stocks	3200	3200	3300	3300	3410	3340	(1000 HEAD)
Production (Pig Crop)	34200	34200	35300	35000	36300	35800	(1000 HEAD)
Intra EC Imports	0	0	0	0	0	0	(1000 HEAD)
Total Imports	35	35	35	35	35	35	(1000 HEAD)
TOTAL IMPORTS	35	35	35	35	35	35	(1000 HEAD)
TOTAL SUPPLY	50805	50805	52335	52035	54135	53035	(1000 HEAD)
Intra EC Exports	0	0	0	0	0	0	(1000 HEAD)
Total Exports	1	1	1	1	1	1	(1000 HEAD)
TOTAL EXPORTS	1	1	1	1	1	1	(1000 HEAD)
Sow Slaughter	0	0	0	0	0	0	(1000 HEAD)
OTHER SLAUGHTER	29000	29000	30300	30600	31300	30200	(1000 HEAD)
Total Slaughter	29000	29000	30300	30600	31300	30200	(1000 HEAD)
Loss	4804	4804	4234	4234	4234	4234	(1000 HEAD)
Ending Inventories	17000	17000	17800	17200	18600	18600	(1000 HEAD)
TOTAL	50805	50805	52335	52035	54135	53035	(1000 HEAD)
DISTRIBUTION							
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0	(1000 HEAD)

The key strategy gaining widespread credence is that the livestock sector needs both price support and production support. Price support comes in the form of protection from imports, which has already been implemented. Initiated in 2003, the TRQs act as a mechanism to boost prices and effectively to maintain a floor price that provides producers additional revenues for investment and a captive, secure market for their products. The second leg is production supports. While some production and breeding sector supports exist, they are not available or used by the majority of producers. In discussions surrounding the creation of a new overall farm program (analogous in intent but not similar to the U.S. Farm Bill), direct producer supports have strong backing and will likely be included, especially for the hard-hit sheep and goat sector.

In addition to the possible expansion of federal support programs, many regional governments have forged ahead in creating regional support programs for livestock producers. At the current time, estimates place combined regional direct and indirect production supports as much as two times greater than federal outlays. In the near term, it

appears that Russian producers can expect increasing regional and federal government production support. However, as always in Russian agricultural programs, the key will be efficient program operation and implementation and ensuring that the right people receive the benefits of the program.

The government and in particular the Duma have come to realize that roughly half of Russia's livestock product output comes from smallholders, who hitherto have received little to no support. New policies are under consideration for adoption this spring which would improve services to smallholders, especially marketing infrastructure. The volume of investment needed is massive, however, and funds from federal coffers are unlikely to be forthcoming in greater volumes than in the current budget.

Commodity	Russian Federation				(1000 MT CWE) (1000 HEAD)		UOM
	Meat,	Swine					
Country	2002	Revised	2003	Estimate	2004	Forecast	
Market Year Begin	USDA Official [Old]	Post Estimate [New] 01/2002	USDA Official [Old]	Post Estimate [New] 01/2003	USDA Official [Old]	Post Estimate [New] 01/2004	MM/YYYY
Slaughter (Reference)	29000	29000	30300	30600	31300	30200	(1000 HEAD)
Beginning Stocks	0	0	0	0	0	0	(1000 MT CWE)
Production	1630	1630	1705	1710	1760	1760	(1000 MT CWE)
Intra EC Imports	0	0	0	0	0	0	(1000 MT CWE)
Total Imports	800	800	600	600	530	560	(1000 MT CWE)
TOTAL Imports	800	800	600	600	530	560	(1000 MT CWE)
TOTAL SUPPLY	2430	2430	2305	2310	2290	2320	(1000 MT CWE)
Intra EC Exports	0	0	0	0	0	0	(1000 MT CWE)
Total Exports	1	1	1	1	1	1	(1000 MT CWE)
TOTAL Exports	1	1	1	1	1	1	(1000 MT CWE)
Human Dom. Consumption	2340	2340	2220	2225	2205	2235	(1000 MT CWE)
Other Use, Losses	89	89	84	84	84	84	(1000 MT CWE)
TOTAL Dom. Consumption	2429	2429	2304	2309	2289	2319	(1000 MT CWE)
Ending Stocks	0	0	0	0	0	0	(1000 MT CWE)
TOTAL DISTRIBUTION	2430	2430	2305	2310	2290	2320	(1000 MT CWE)
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0	(1000 MT CWE)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	(1000 MT CWE)

PSD Table**Country:****Russian
Federation**1.42 <-
Conversion
factor for
CWE**Commodity:****Cattle Meat,
Beef &
Veal**

Calendar Year Begin	2002		2003		2004	
	Old	New Jan-2001	Old	New 01/2002	Old	New 01/2003
Slaughter (Reference)	9970	9970	9660	9350	9490	9660
Beginning Stocks	0	0	0	0	0	0
Production	1760	1760	1730	1740	1670	1700
Intra EC Imports	0	0	0	0	0	0
Other Imports	650	650	700	760	740	750
TOTAL Imports	650	650	700	760	740	750
TOTAL SUPPLY	2410	2410	2430	2500	2410	2450
Intra EC Exports	0	0	0	0	0	0
Other Exports	6	6	5	5	5	5
TOTAL Exports	6	6	5	5	5	5
Human Dom. Consumption	2339	2339	2365	2435	2350	2395
Other Use, Losses	65	65	60	60	55	50
TOTAL Dom. Consumption	2404	2404	2425	2495	2405	2445
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	2410	2410	2430	2500	2410	2450
Calendar Yr. Imp. from U.S.	0		0	0		
Calendar Yr. Exp. to U.S.	0		0	0	0	