



Meat and Poultry Export Trade: General Statistics

- In 2024, U.S. meat and poultry exports exceeded \$24.6 billion. Annually, approximately 13 percent of U.S. beef production, 15 percent of U.S. poultry production, and 25 percent of U.S. pork production are exported, although those figures have been higher in recent years.¹
- According to a 2022 report published by the Economic Research Service, U.S. agricultural exports support 86,127 jobs in the beef industry, 52,999 jobs in the pork industry, and 45,855 jobs in the poultry industry.²
- Exports add value to every animal produced and in turn increase demand for U.S. corn and soybeans. For example, on average, pork exports contribute \$64 in value to each hog that is marketed in the U.S. and U.S. beef exports yield more than \$400 in value per head of cattle.

Trade with Canada and Mexico: Meat and Poultry Products

- Canada was the U.S.'s fifth largest export market for beef (\$896 million), by value, in 2024, and finished the year as the fourth largest value market for U.S. pork exports (\$852 million) and the second largest value market for U.S. poultry exports (\$531 million).
 - Canada is the top market for U.S. processed pork.
- Mexico was the U.S.'s fourth largest beef (\$1.3 billion) export market by value, and the top value destination for U.S. pork (\$2.5 billion) and poultry (\$1.4 billion) exports in 2024.
 - Importantly, Mexico is a key market for U.S. beef variety meat exports – products not commonly consumed domestically – including tripe, lips, hearts, and intestines. Increases in U.S. pork variety meat exports (stomach and intestines) to Mexico have offset losses to other markets, like China, in recent years.
- Additionally, Canada and Mexico are two of the largest suppliers of beef to the U.S., with value exceeding \$2.6 billion and \$1.7 billion, respectively, in 2024. Canada is the largest exporter of both pork (\$1.1 billion) and poultry (\$650 million) products, by value, to the U.S., whereas Mexico is the U.S.'s third largest supplier of both pork (\$194 million) and poultry (\$31 million) products by value.

Trade with Canada and Mexico: Live Animals

- Canada and Mexico are the U.S.'s top two cattle suppliers. The importance of imported livestock rises when the U.S. herd rebuilds, and U.S. beef and pork processing plants, particularly smaller- and medium-sized establishments, rely on a consistent, stable supply of imported livestock to remain operational.

¹ USDA GATS Data, <https://apps.fas.usda.gov/gats/default.aspx>

² Economic Research Service (ERS) Multiplier Data, <https://investigatamidwest.org/2024/11/06/graphic-us-agricultural-exports-support-1-25-million-jobs/>

- In 2024, Mexico supplied 1,249,202 head of cattle to the U.S. industry, whereas cattle from Canada totaled 793,291 head. The U.S., meanwhile, exported 322,831 and 21,251 head of cattle to Canada and Mexico, respectively.³
 - The preponderance of imports from Mexico are lighter-weight cattle intended for stocker or feeder operations. More than 60% of imported cattle from Canada are destined for immediate slaughter; of Canadian cattle imported for immediate slaughter, on average, 60% are fed steers and heifers and 40% are cows. Feeder cattle imported for finishing in U.S. feedlots consist of more than 30% of the cattle imported from Canada.
- In 2024, the U.S. imported 6,761,807 live hogs from Canada, mostly as feeders to be finished and sold as market hogs. Canada is also the second largest exporter of broilers to the U.S., with imports totaling 40,547 in 2023. Moreover, U.S. live hog exports to Mexico and Canada reached 56,176 and 13,108, respectively, in 2024. Exports of U.S. broilers to Mexico and Canada were 1,588,217 and 318,547, respectively, in 2023.

Trade with China

- In 2024, China was the U.S.'s third largest market, by value, for beef, pork, and poultry exports. U.S. beef exports to China in 2024 exceeded \$1.5 billion, while U.S. pork exports were valued at more than \$1.1 billion. U.S. poultry export value to China surpassed \$499 million in 2023.
- China is the U.S.'s largest market for pork variety meat, by value.

Retaliation

- In 2018/2019, Mexico retaliated against the U.S. pork industry in response to Section 232 tariffs imposed on steel and aluminum imports. During that period, the U.S. pork industry lost an estimated \$646 million due to Mexico's retaliatory tariffs.⁴
- Products often cross USMCA borders multiple times before reaching the end consumer. Live animals may be imported from either Canada or Mexico and slaughtered in the U.S., after which product from that animal is then exported for further processing in one of the other countries, when it is finally reexported back to the U.S. for retail sale. Products that cross the border multiple times will likely be subject to tariff rates exceeding 50 percent if duties are applied each time imports from Canada and Mexico enter the U.S. This could prove cost prohibitive for many U.S. meat and poultry companies that rely on imported livestock, muscle cuts, and other ingredients and inputs to meet customer and consumer preferences. Most meat products traded across the USMCA region are chilled, which complicates the ability of exporters to easily divert those product exports to other markets.
- Retaliation by Canada and Mexico against meat, poultry, and live animal exports from the U.S. would compound the costs outlined in the aforementioned bullet and would likely be more widespread and detrimental in scope than the 2018/2019 retaliation if all imports from Canada and Mexico are targeted.
- In China, U.S. pork exports continue to face retaliatory tariffs imposed during the first Trump Administration. Currently, U.S. pork exports are subject to 37% duties (12% Most

³ ERS Trade Data, 2023, <https://www.ers.usda.gov/data-products/livestock-and-meat-international-trade-data>

⁴ ERS, <https://www.ers.usda.gov/amber-waves/2022/march/retaliatory-tariffs-reduced-u-s-states-exports-of-agricultural-commodities#:~:text=Pork%20represented%20nearly%205%20percent,new%20import%20conditions%20in%202017>.

Favored Nation (MFN) rate plus the 25% retaliatory rate), whereas competitors only pay the 12% rate. U.S. beef exports are subject to China's 12% MFN duty (competitors, like Australia, pay no duty).

- Currently, U.S. beef and pork exports are receiving waivers for retaliatory tariffs China imposed in response to the U.S.'s Section 301 tariffs on Chinese imports. Duties of at least 25% have been temporarily waived since March 2020.