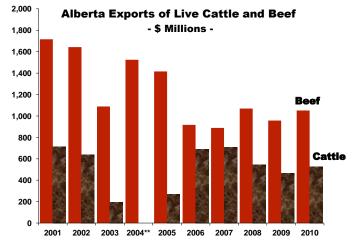
TRENDS IN ALBERTA AGRI-FOOD EXPORTS, 2001 - 2010 - Alberta Exports of Livestock -

| | | | | | | | | | Average | | | |
|--------------------|-------------|-------|-------|------|-------|-------|-------|-------|---------|-------|-------------|-------------|
| Live Animals (1) | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2006 - 2010 | 2001 - 2005 |
| | \$ Millions | | | | | | | | | | | |
| 1. Live Cattle | 711.9 | 635.9 | 196.1 | - | 271.2 | 690.3 | 708.2 | 542.8 | 466.1 | 524.8 | 586.4 | 363.0 |
| % of All Animals | 82.5 | 85.9 | 72.6 | - | 72.9 | 88.1 | 88.8 | 86.5 | 87.2 | 88.4 | 87.9 | 77.6 |
| 2. Hogs | 123.7 | 75.7 | 54.3 | 72.7 | 68.9 | 55.6 | 53.8 | 50.0 | 38.7 | 40.2 | 47.7 | 79.1 |
| 3. Horses / Mules | 17.0 | 17.0 | 13.9 | 18.4 | 23.4 | 23.1 | 18.6 | 16.0 | 10.0 | 12.9 | 16.1 | 17.9 |
| 4. Bison | 0.8 | 0.9 | 0.2 | - | 1.8 | 6.9 | 9.4 | 15.7 | 15.2 | 10.2 | 11.5 | 0.7 |
| 5. Mammals | - | 2.8 | 0.9 | 0.1 | 3.3 | 3.5 | 2.9 | 1.4 | 1.5 | 1.3 | 2.1 | 1.4 |
| 6. Sheep | 2.3 | 4.6 | 3.0 | - | 0.0 | - | 0.0 | 0.0 | - | 0.0 | 0.0 | 2.0 |
| 7. Goats | 0.2 | 0.9 | 0.4 | 0.0 | - | 0.0 | 0.0 | - | - | - | 0.0 | 0.3 |
| 8. Poultry | 0.2 | 0.3 | 0.3 | 0.8 | 1.1 | 2.7 | 2.9 | - | - | - | 1.1 | 0.5 |
| 9. Other | 6.8 | 2.2 | 1.1 | 1.3 | 2.5 | 1.5 | 1.8 | 1.9 | 3.3 | 4.0 | 2.5 | 2.8 |
| All Animal Exports | 863.0 | 740.2 | 270.2 | 93.3 | 372.1 | 783.7 | 797.8 | 627.8 | 534.7 | 593.4 | 667.5 | 467.8 |

| Meat (2) | \$ Millions | | | | | | | | | | | |
|-----------------------|-------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| 1. Beef | 1,715.4 | 1,642.6 | 1,088.5 | 1,525.0 | 1,416.0 | 916.4 | 888.0 | 1,068.7 | 956.9 | 1,051.7 | 976.3 | 1,477.5 |
| % of All Meat | 84.8 | 85.6 | 77.3 | 77.9 | 72.5 | 65.4 | 68.4 | 72.1 | 68.5 | 69.6 | 68.9 | 79.7 |
| 2. Pork | 218.3 | 191.8 | 253.0 | 357.7 | 465.4 | 423.7 | 345.8 | 342.1 | 361.1 | 391.6 | 372.9 | 297.3 |
| 3. Horse / Mule Meat | 65.4 | 51.6 | 44.6 | 47.9 | 48.3 | 44.1 | 47.7 | 52.7 | 60.3 | 49.2 | 50.8 | 51.6 |
| 4. Bison meat | 6.3 | 5.4 | 6.1 | 11.8 | 11.7 | 6.0 | 4.3 | 6.8 | 7.4 | 6.0 | 6.1 | 8.3 |
| 5. Poultry | 3.0 | 4.3 | 2.5 | 3.5 | 5.4 | 5.2 | 5.0 | 5.8 | 5.1 | 6.3 | 5.5 | 3.7 |
| 6. Sheep / Lamb Cuts | 0.1 | 0.1 | 0.1 | 0.2 | 0.2 | 0.1 | 0.1 | 0.2 | 0.1 | 0.2 | 0.1 | 0.1 |
| 7. Other Meat & Offal | 0.3 | 0.3 | 0.1 | 1.4 | 1.9 | 2.2 | 1.9 | 2.8 | 2.2 | 2.1 | 2.3 | 0.8 |
| 8. Processed Meat | 14.7 | 22.5 | 13.8 | 10.9 | 5.2 | 2.8 | 5.4 | 2.7 | 3.6 | 3.2 | 3.5 | 13.4 |
| All Meat Exports | 2,023.6 | 1,918.6 | 1,408.7 | 1,958.5 | 1,954.1 | 1,400.4 | 1,298.2 | 1,481.7 | 1,396.7 | 1,510.3 | 1,417.5 | 1,852.7 |

| Top Livestock Export Products and Top Markets | | | | | | | | | |
|---|------------|-----------|-------------|------------|--|--|--|--|--|
| Five Year Average (2006-2010) | | | | | | | | | |
| Beef | Live | Pork | Horse | Live | | | | | |
| Deel | Cattle | FUIK | Meat | Hogs | | | | | |
| United States (US) | US Japan | | France | US | | | | | |
| 75.0% | 99.9% | 49.0% | 34.7% | 99.5% | | | | | |
| Mexico 15% | Other 0.1% | US 22% | Japan 33% | Other 0.5% | | | | | |
| Japan | | S. Korea | Switzerland | | | | | | |
| Hong Kong | | Australia | Belgium | | | | | | |
| Russia | | Russia | Mexico | | | | | | |
| Other | | Other | Other | | | | | | |
| Average Export Value, All Countries - \$ Millions | | | | | | | | | |
| 976 | 585 | 373 | 51 | 48 | | | | | |



*BSE - bovine spongiform encephalopathy.

**In 2004, Alberta did not export any cattle due to BSE.

(1) Live animals include purebred.

(2) Meat refers to fresh, chilled, frozen cuts and includes edible offal.

> Alberta is the largest beef producing province in Canada, and the leading exporter of beef and live cattle. Also, the province is the third largest exporter of live hogs and ranked fourth in exports of pork. In the past five-years (2006-2010), the combined exports of live cattle, hogs, beef and pork averaged \$2.0 billion and accounted for almost 30.0% of Alberta total agri-food exports (\$7.0 billion).

> Exports of live animals include cattle, hogs, bison, horses and mules, sheep, poultry and other animals. Historically, cattle represent the largest share of live animal exports, followed by hogs. Exports of horses and bison ranked third and fourth largest, respectively. In 2003, Alberta experienced trade restrictions resulting from the discovery of BSE*. Consequently, the five-year (2001-2005) average value of exported cattle, at \$363 million, was much lower than the 2006-2010 average, at \$585 million. Nationally, Alberta accounted for 46.0% of total Canadian cattle exports (2006-2010). Contrary to live cattle, between 2001 and 2005, live hog exports, at \$79 million, were higher than during the past five years (2006-2010), at \$48 million. The United States continues to be Alberta's sole importer of non-purebred live cattle and hogs.

> Exports of meat include beef, pork, horsemeat, bison, poultry, sheep and lamb, other meat, offal and processed meat (cured, canned or prepared by other processes). During the five-year period, from 2001-2005, revenue from meat exports averaged \$1.9 billion and accounted for 35.8% of Alberta total agri-food exports (\$5.2 billion). By comparison, the 2006 - 2010 average was \$1.4 billion or 20.3% of the total (\$7.0 billion). Traditionally, beef has been Alberta's largest meat export followed by pork. Between 2006 and 2010, these two categories accounted for 95.2% of total meat exports. All other types of exported meat (including processed meat) comprised less than 5.0%.

> Almost three-quarters of the total value of Canadian beef exports come from Alberta. Between 2001 and 2005, beef exports from the province contributed \$1.5 billion to Alberta's agri-food exports. Over the past five years (2006-2010), revenue from beef exports was on average \$976 million. Lower meat prices contributed to this decline. However, in 2010, beef prices improved and the value of exports increased 10.0% to \$1.1 billion. The United States is Alberta's most important market for beef, followed by Mexico, Japan, Hong Kong and Russia. On January 20, 2012, Canada regained access to South Korea, Alberta's fourth largest beef export market before BSE*.

> Pork is Alberta's second largest meat export after beef. Over the past five years, 2006-2010, pork exports showed an upward trend. On average, the province exported \$373 million of pork, compared to \$297 million during the previous five-year period. Japan remains the largest market for Alberta's pork, followed by the United States, South Korea, Australia and Russia. Between 2006 and 2010, these markets combined, represented 90.0% of Alberta's total value of pork exports.

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