

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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POLICY

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## **EU-27**

**Post:** Brussels USEU

### **State of the Veterinary Equivalence Agreement**

**Report Categories:**

Trade Policy Monitoring

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**Report Highlights:**

This report appraises the state of parity in the Veterinary Equivalency Agreement (VEA) between the United States and the European Union and its effect on bilateral trade from 2005-09. It highlights the clauses of the VEA where some level of equivalency has been achieved and the products that it affects.

## **Executive Summary:**

The following report evaluates the effects of the Veterinary Equivalency Agreement (VEA) between the United States and the European Union (EU) on bilateral trade from 2005-09.

After six years of negotiating, on July 20, 1999, the U.S. and EU signed the VEA, which seeks to establish a mechanism for the recognition of equivalence of sanitary measures pertinent to trade in animals and animal products. The concept of the equivalency agreement allows veterinary inspection requirements to differ between the U.S. and the EU but ensures the United States' right to establish its own level of public health protection.

In the 10 years preceding the VEA, 1989-1999, U.S. exports to the EU of products covered by the Agreement rose by 44 percent and were worth over \$2 billion in value. In the following ten years, 1999-09, U.S. exports of those products increased by 67 percent, reaching a value of \$3.5 billion. In contrast, U.S. exports to the world for the same products increased by 75 percent in value in from 1989-99 and again at the same rate from 1999-09. As the rate of growth for bilateral trade between the U.S. and the EU increased after the implementation of the Agreement but remained steady for U.S. exports to the world this suggests that the Agreement has had some positive impact on bilateral trade between the U.S. and the EU. However, the EU falls behind the United States in extending equivalency to U.S. products under the VEA. Achieving greater equivalency could accelerate the rate of growth in U.S. exports for the products affected by the VEA.

Production, supply and demand numbers suggest that this state of equivalency may be protecting local production in the EU. EU imports of swine and beef were a relatively small percentage of production. In 2006 EU imports of beef were 8.8 percent of swine production in the EU, compared to 11.7 percent for the United States. For swine, EU imports composed 0.002 percent of EU production in 2006 and in sharp contrast to the United States, which stood at 8.3 percent.

This report is organized into two sections. The first lays out the clauses in the Agreement where some level of equivalency has been achieved by at least one party. There are three classifications for the degree of parity reached: Perfect, where both parties offer Yes 1; equal, which is any combination of Yeses below Yes 1 where both parties are in sync (e.g., a Yes 2 and a Yes 2); mixed, or any combination of Yeses in which the parties are out of sync (e.g. Yes 2 and Yes 3); finally, lopsided, wherein one party offers some level of equivalency and the other does not. The second section examines bilateral trade in the context of global trade for a cross section of the commodities affected by the Agreement to approximate the effects the VEA has on trade.

The U.S. overwhelmingly provides more favorable trade conditions to EU products than the EU gives U.S. products. For Yes (1), the highest level of equivalency where the importing party fully accepts the exporting party's sanitary standards, the U.S. achieves this level 28 times to the EU's 3. For Yes (2), the second highest level of equivalency, which means that the importing party accepts the exporting party's sanitary standards but with special conditions, the U.S. offers this level 36 times to the EU's 8. For Yes (3) the lowest level of equivalency, where equivalency is "agreed in principle" but "subject to satisfactory completion" of further actions, the U.S. meets this level 10 times to the EU's 9.

The following terminology is specific to the VEA and necessary for understanding the tables and graphs contained in this report.

- Yes (1): The importing Party agrees that the exporting Party’s measures achieve the importing Party’s appropriate level of sanitary protection.
- Yes (2): The importing Party agrees that the exporting Party’s measures, with the special conditions set out, achieve the importing Party’s appropriate level of sanitary protection.
- Yes (3): Equivalence agreed in principle, subject to satisfactory completion of the actions. Pending completion, trade shall occur on the basis of the special conditions set out.
- NE: Not evaluated. Trade shall occur on the basis of compliance with the importing Party’s requirements.
- E: Still evaluating. Trade shall occur on the basis of compliance with the importing Party’s requirements.

**General Information:**

**Conditions of Parity in the Veterinary Equivalency Agreement**

VEA Clause	Animal/ Public Health	Species/ Commodity	Equivalency		
			Parity	U.S.	E.U.
6. Fresh meat	Animal	equidae, porcine, animals	Mixed	Yes 1	Yes 2
		Ruminants	Equal	Yes 2	Yes 2
	Public	Ruminants, equidae, porcine, ovine, caprine	Equal	Yes 3	Yes 3
7. Poultry meat	Animal		Perfect	Yes 1	Yes 1
	Public		Equal	Yes 3	Yes 3
8. Meat products	Animal	Red meat (ruminants/ equidae)	Equal	Yes 2	Yes 2
		Pigs	Mixed	Yes 1	Yes 2
		Poultry	Mixed	Yes 1	Yes 2
		Wild and farmed game	Lopsided	Yes 2	NE
	Public	Ruminants, equidae, pigs, poultry	Equal	Yes 3	Yes 3
9. Farmed game meat	Animal	Deer	Lopsided	Yes 2	NE
		Rabbit	Lopsided	Yes	NE

				1	
		Porcine	Lopsided	Yes 1	NE
		Feathered	Lopsided	Yes 1	NE
<b>11. Fisheries products for human consumption</b>	Public	Fish/fisheries products	Lopsided	Yes 3	Yes 3/ Yes 1
<b>13. Milk and milk-based products for human consumption</b>	Animal	cattle, buffalo, sheep, goats	Equal	Yes 2	Yes 2
	Public	UHT-milk/sterilised milk	Equal	Yes 3	Yes 3
		Pasteurised products	Equal	Yes 3	Yes 3
		Not pasteurised (raw or thermised)	Equal	Yes 3	Yes 3
<b>14. Milk and milk-based products not for human consumption</b>	Animal	cattle, buffalo, sheep, goats	Lopsided	Yes 2	NE
		All pasteurised or UHT or sterilised	Lopsided	Yes 2	NE
<b>15. Minced meat</b>	Animal	Ruminants	Lopsided	Yes 2	NE
		Pigs	Lopsided	Yes 1	NE
	Public	Ruminants	Equal	Yes 3	Yes 3

VEA Clause	Animal/ Public Health	Species/ Commodity	Equivalency		
			Parity	U.S.	E.U.
<b>16. Meat preparations</b>	Animal	Ruminants, equidae	Lopsided	Yes 2	NE
		Pigs	Lopsided	Yes 2	NE
		Poultry/wild game/farmed game	Lopsided	Yes 1	NE
	Public	Ruminants, equidae, pigs, poultry	Lopsided, Equal	Yes 2/ Yes 3	Yes 3
<b>17. Animal casings for human consumption</b>	Animal	cattle	Lopsided	Yes 2	NE
		Pigs	Lopsided	Yes 2	NE
		Sheep, goats	Lopsided	Yes 2	NE
<b>18. Animal casings not for human consumption</b>	Animal	Cattle	Lopsided	Yes 2	NE
		Pigs	Lopsided	Yes 2	NE
		Sheep, goats	Lopsided	Yes 2	NE
<b>19. Hides and skins</b>	Animal	Cattle, sheep, goats, pigs	Lopsided	Yes 1	E
<b>20. Canned pet food containing high/low risk material</b>		Containing mammalian material	Lopsided	Yes 2	E
		Containing only non-mammalian material	Lopsided	Yes 2	E

21. Canned pet food containing only low risk material		Containing mammalian material	Lopsided	Yes 2	E
		Containing only non-mammalian material	Lopsided	Yes 2	E
22. Dry and semi moist petfood containing only low risk material			Lopsided	Yes 2	E
23. Dry and semi moist petfood containing high/low risk material		Containing mammalian material	Lopsided	Yes 2	E
		Containing only non-mammalian material	Lopsided	Yes 1	E

VEA Clause	Animal/ Public Health	Species/ Commodity	Equivalency		
			Parity	U.S.	E.U.
24. Bones and bone products for human consumption	Animal	Fresh meat (ruminants, horses, pigs)	Lopsided	Yes 2	NE
		Farmed game: pigs, deer	Lopsided	Yes 2	NE
		Fresh meat: Poultry	Lopsided	Yes 1	NE
		Feathered, farmed, and wild game	Lopsided	Yes 1	NE
		Wild game: pigs, deer	Lopsided	Yes 2	NE
25. Bones, horns, and hooves and their products not for human consumption	Animal		Lopsided	Yes 1	NE
26. Processed animal protein for human consumption	Animal	Fresh meat (ruminants, equidae, pigs)	Lopsided	Yes 2	NE
		Farmed game: pigs, deer	Lopsided	Yes 2	NE
		Fresh meat: Poultry	Lopsided	Yes 1	NE
		Feathered, farmed, and wild game	Lopsided	Yes 1	NE
27. Processed animal protein not for human consumption	Containing material of mammalian origin	Ruminants	Lopsided	Yes 2	NE
		Non-ruminants	Lopsided	Yes 3	NE

	Containing material of non-mammalian origin	Poultry and fish	Lopsided	Yes 1	NE
		Non-ruminants	Lopsided	Yes 1	NE
<b>29. Blood and blood products intended for human consumption</b>	Animal	Farmed game: pigs, deer	Lopsided	Yes 2	NE
		Fresh meat: Poultry	Lopsided	Yes 1	NE
		Feathered farmed and wild game	Lopsided	Yes 1	NE
		Wild game: pigs, deer	Lopsided	Yes 1	NE
<b>30. Blood and blood products not intended for human consumption</b>	Animal		Equal	Yes 2	Yes 2

VEA Clause	Animal/ Public Health	Species/ Commodity	Equivalency		
			Parity	U.S.	E.U.
<b>31. Lard and rendered fats intended for human consumption</b>	Animal	Fresh meat: ruminants, horses, pigs	Lopsided	Yes 2	NE
		Farmed game: pigs, deer	Lopsided	Yes 2	NE
		Fresh meat: poultry	Lopsided	Yes 1	NE
		Feathered farmed and wild game	Lopsided	Yes 1	NE
		Wild game: pigs, deer	Lopsided	Yes 2	NE
<b>32. Lard and rendered fats not intended for human consumption</b>			Lopsided	Yes 2	NE
<b>33. Raw material for feeding stuffs, pharmaceutical or technical use</b>	Animal		Lopsided	Yes 1	NE
<b>35. Game trophies</b>	Animal		Lopsided	Yes 1	NE
<b>37. Wool, feathers and hair</b>	Animal	Wool	Lopsided	Yes 1	NE
		Pig bristles	Lopsided	Yes 1	NE

41. Egg products for human consumption	Animal		Lopsided	Yes 2	Yes 1
42. Shell eggs	Animal		Lopsided	Yes 1	Yes 2

### Total Condition of Equivalency for the VEA

	United States Standards	European Union Standards
Yes 1	28	3
Yes 2	36	8
Yes 3	10	9
Not evaluated	31	82
Still Evaluating	17	21
Special Conditions	63	34

### Comparative Trade Analysis

#### Poultry (HS 0207)

Poultry is the only commodity under the VEA that achieves perfect parity. U.S. exports to the EU declined from 2005-09 by 21.5 percent in value terms while U.S. imports from the EU dropped by 164.8 percent.

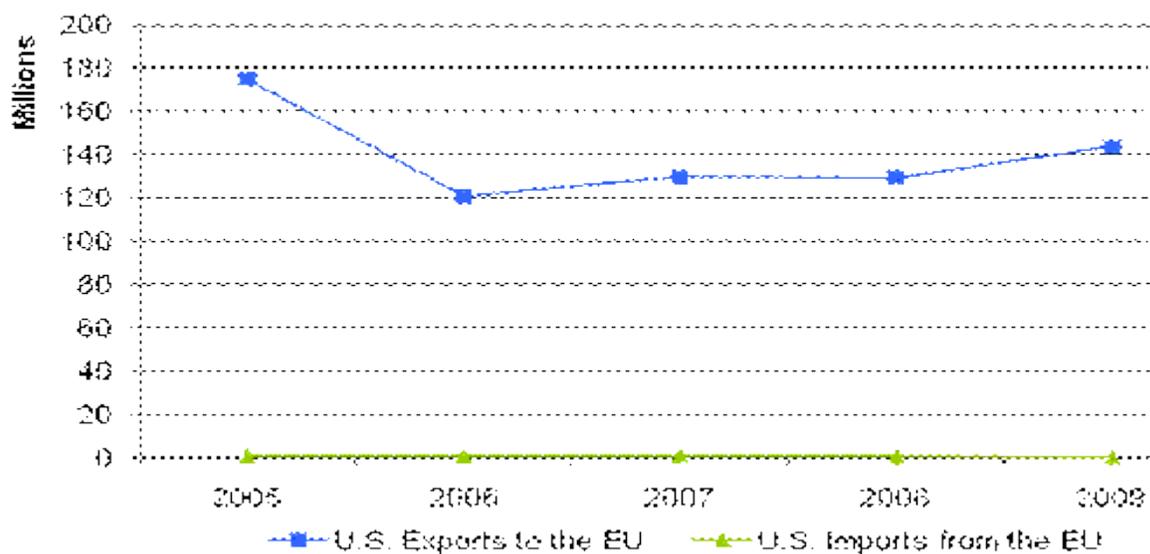
### Poultry Value and Quantity 2005-09

Poultry		2005	2006	2007	2008	2009	Total
U.S. Exports to the World	Value	\$2,483,756,993	\$2,216,308,027	\$3,251,576,000	\$4,155,110,338	\$3,848,690,902	\$15,955,442,260
	Quantity	2,744,239	2,783,277	3,318,443	3,928,500	3,736,368	16,510,826
U.S. Exports to the	Value	\$174,874,672	\$120,918,879	\$129,700,154	\$129,489,995	\$143,880,399	\$698,864,099
	Quantity	225,808	185,360	146,810	128,573	148,756	835,306

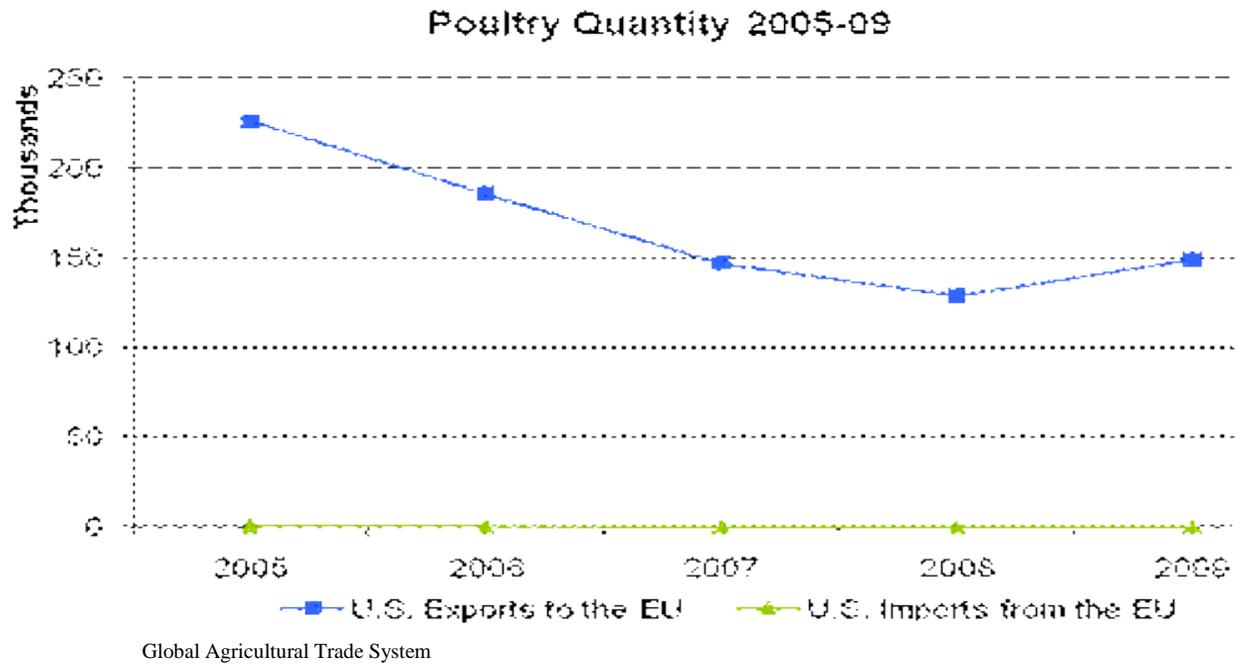
E.U.							
U.S. Imports from the E.U.	Value	\$966,380	\$889,912	\$1,087,618	\$708,370	\$364,922	\$4,017,202
	Quantity	472	382	111	66	40	1,070
E.U. Imports from the World	Value	\$720,069,233	\$483,486,041	\$530,163,058	\$598,641,507	\$453,677,089	\$2,786,036,928
	Quantity	102,200	64,967	148	84	93	167,492

Global Agricultural Trade System; EU imports are from Global Trade Atlas

Poultry Value 2005-09



Global Agricultural Trade System



**Swine (HS 0203)**

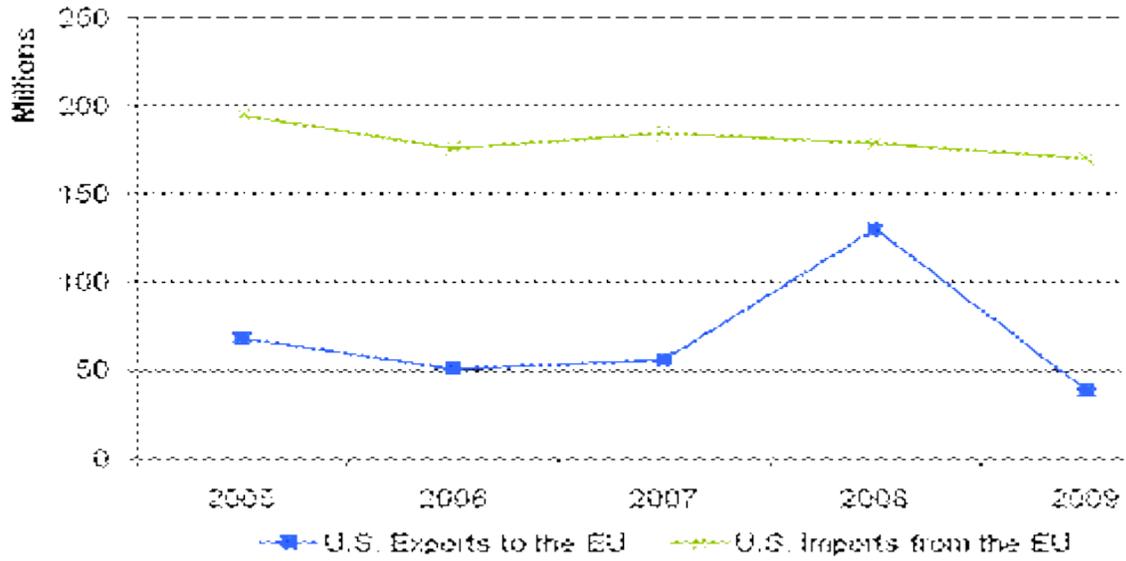
Swine is addressed in 20 different clauses. Of them three achieve equivalency at the Yes (3) level, for

the remainder the U.S. extends five at the Yes (1) level, 12 at the Yes (2) level and three at the Yes (3) level while the highest equivalency the EU extends is one Yes (2), in addition to three Yes (3) and 16 Not Evaluated. This disparity in equivalency is reflected in the value of U.S. exports to the EU, which are substantially outpaced by U.S. imports from the EU, at a difference over \$560 million.

### Swine Value and Quantity 2005-09

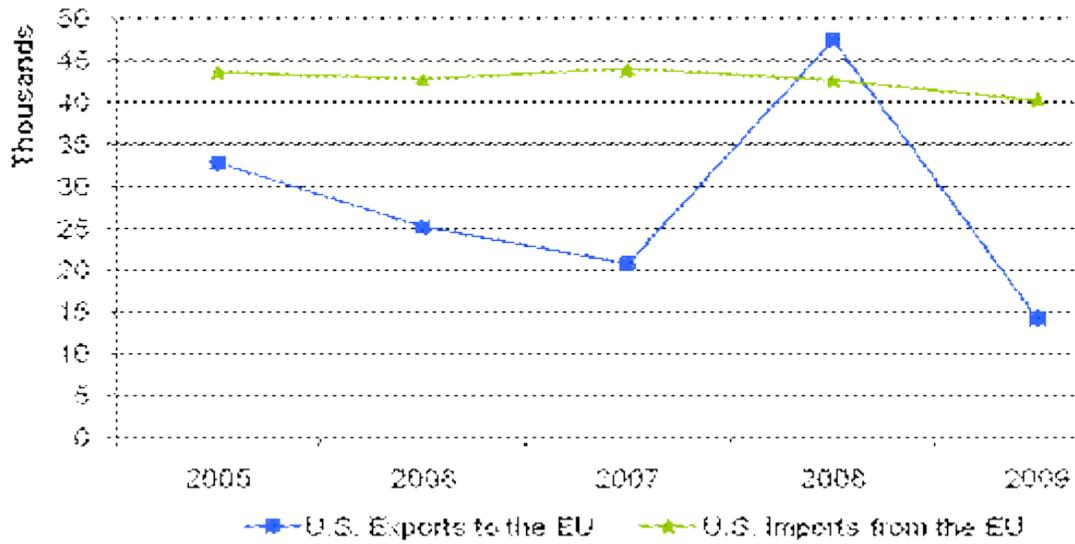
Swine		2005	2006	2007	2008	2009	Total
U.S. Exports to the World	Value	\$2,036,234,077	\$2,219,772,623	\$2,487,502,818	\$3,787,243,133	\$3,178,924,275	\$13,709,676,926
	Quantity	805,757	905,825	965,962	1,466,784	1,253,681	5,398,008
U.S. Exports to the E.U.	Value	\$68,349,090	\$50,940,673	\$56,016,310	\$129,974,221	\$38,854,345	\$344,134,639
	Quantity	32,789	25,103	20,754	47,379	14,256	140,280
U.S. Imports from the E.U.	Value	\$194,800,997	\$175,806,792	\$184,553,436	\$179,036,652	\$170,363,639	\$904,561,516
	Quantity	43,538	42,753	43,914	42,579	40,268	213,051
E.U. Imports from the World	Value	\$177,276,254	\$221,455,398	\$100,236,801	\$168,472,678	\$98,782,745	\$766,223,876
	Quantity	31,157	25,348	9,979	22,951	7,023	96,458

Swine Value 2005-09



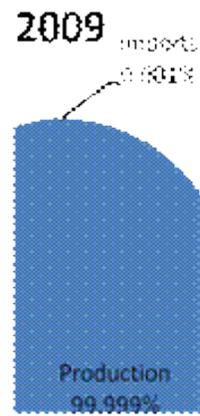
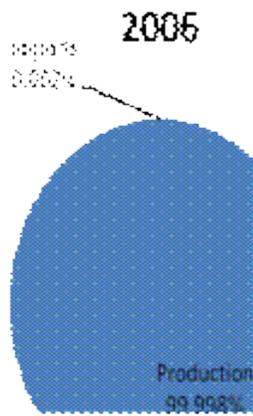
Global Agricultural Trade System

Swine Quantity 2005-09



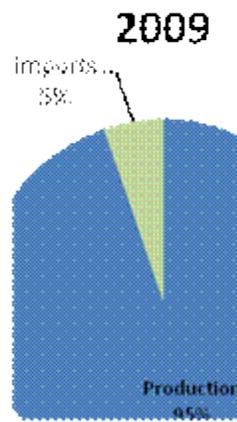
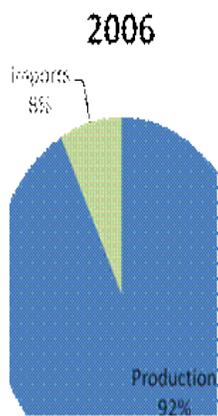
Global Agricultural Trade System

**EU Swine  
Production Supply and Demand**



Foreign Agricultural Service Official USDA Estimates

### U.S. Swine Production Supply and Demand



Foreign Agricultural Service Official USDA Estimates

**Bovine Meat (HS 0201)**

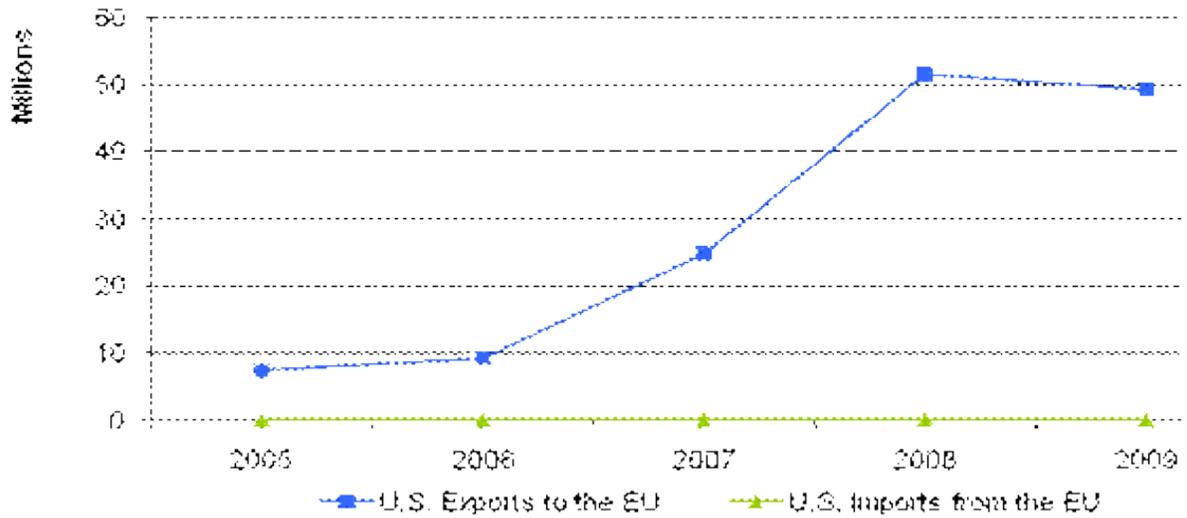
Bovine meat is addressed in six clauses of the VEA. These clauses achieve a relatively high level of parity compared to other products covered by the VEA. Although none reach perfect parity, five achieve equal equivalency with two Yes (2) and three Yes (3), and only one lopsided parity. U.S. exports the EU increased in value by 89 percent from 2005-09.

**Bovine Meat Value and Quantity 2005-09**

Bovine Meat		2005	2006	2007	2008	2009	Total
U.S. Exports to the World	Value	\$724,624,347	\$1,205,674,616	\$1,467,489,072	\$1,807,164,522	\$1,608,404,649	\$6,813,357,206
	Quantity	173,337	293,473	333,794	398,172	361,413	1,560,189
U.S. Exports to the E.U.	Value	\$7,370,928	\$9,239,147	\$24,800,367	\$51,532,156	\$49,346,030	\$142,288,628
	Quantity	1,008	1,665	4,505	11,432	7,694	26,303
U.S. Imports from the E.U.	Value	\$0	\$0	\$0	\$56,283	\$0	\$56,283
	Quantity	0	0	0	19	0	19
E.U. Imports from the World	Value	\$1,030,816,132	\$1,243,222,282	\$1,547,928,405	\$1,311,697,181	\$1,070,843,410	\$6,204,507,410
	Quantity	286	484	2,016	4,698	6,948	14,432

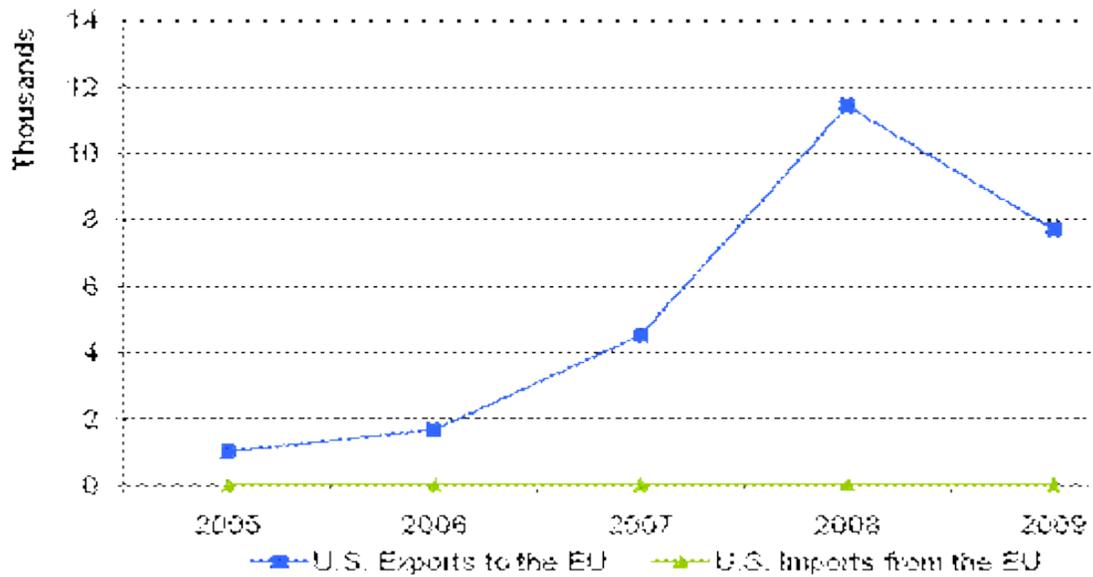
Global Agricultural Trade System; EU imports are from Global Trade Atlas

**Bovine Meat Value 2005-09**



Global Agricultural Trade System

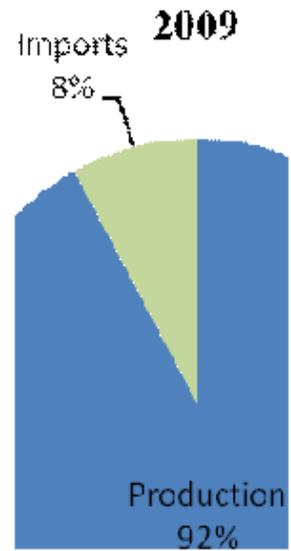
**Bovine Meat Quantity 2005-09**



Global Agricultural Trade System

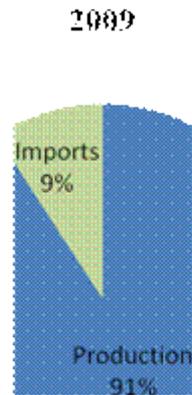
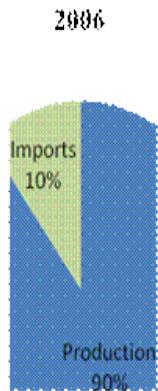
**EU Beef**

## Production Supply and Demand



Foreign Agricultural Service Official USDA Estimates

## U.S. Beef Production Supply and Demand



Foreign Agricultural Service Official USDA Estimates

***Fish, Frozen/Whole (HS 0303)***

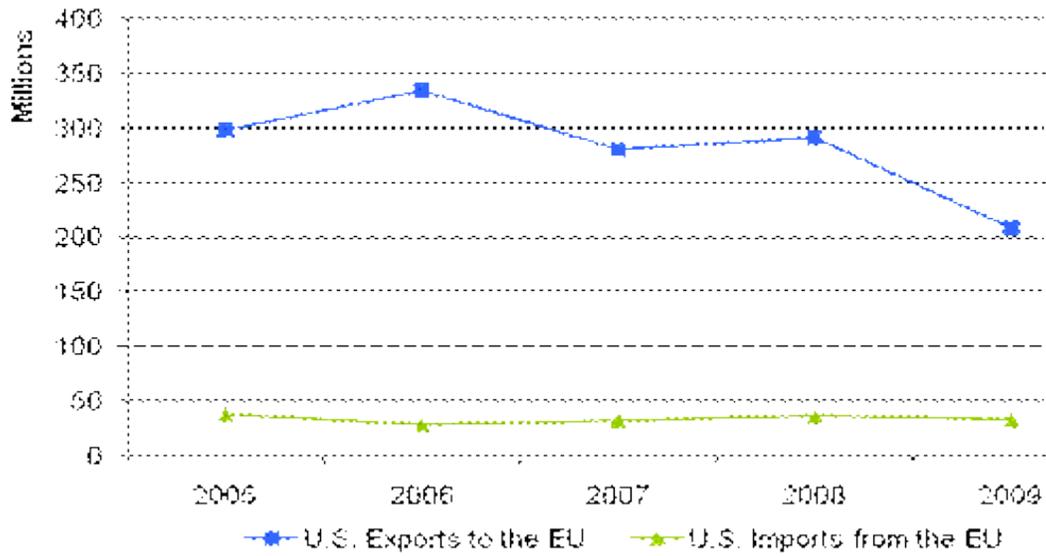
Of the VEA clauses that concern fish, four have not been evaluated by either party. The United States extends a Yes (3) to EU products and the EU extends both a Yes (1) and a Yes (3). This is one of only two cases in which the EU provides more favorable trade conditions than the United States. U.S. exports to the EU fell in value by 43.1 percent from 2005-09 while U.S. imports of EU fish declined by 14.3 percent during the same time.

**Fish (Frozen/Whole) Value and Quantity 2005-09**

Fish		2005	2006	2007	2008	2009	Total
U.S. Exports to the World	Value	\$1,683,341,223	\$1,731,840,232	\$1,719,279,361	\$1,552,069,635	\$1,336,461,629	\$8,022,992,080
	Quantity	632,419	659,524	667,167	567,962	518,600	3,045,671
U.S. Exports to the E.U.	Value	\$297,909,348	\$334,452,596	\$280,306,639	\$290,908,060	\$208,189,258	\$1,411,765,901
	Quantity	118,493	127,696	94,394	84,452	71,402	496,437
U.S. Imports from the E.U.	Value	\$37,547,953	\$28,542,918	\$32,318,707	\$36,534,023	\$32,850,433	\$167,794,034
	Quantity	5,234	3,302	4,894	3,721	4,231	21,382
E.U. Imports from the World	Value	\$1,437,502,153	\$1,779,499,634	\$1,998,989,955	\$1,989,011,595	\$1,663,965,671	\$8,868,969,008
	Quantity	64,874	81,417	80,840	73,427	60,471	361,029

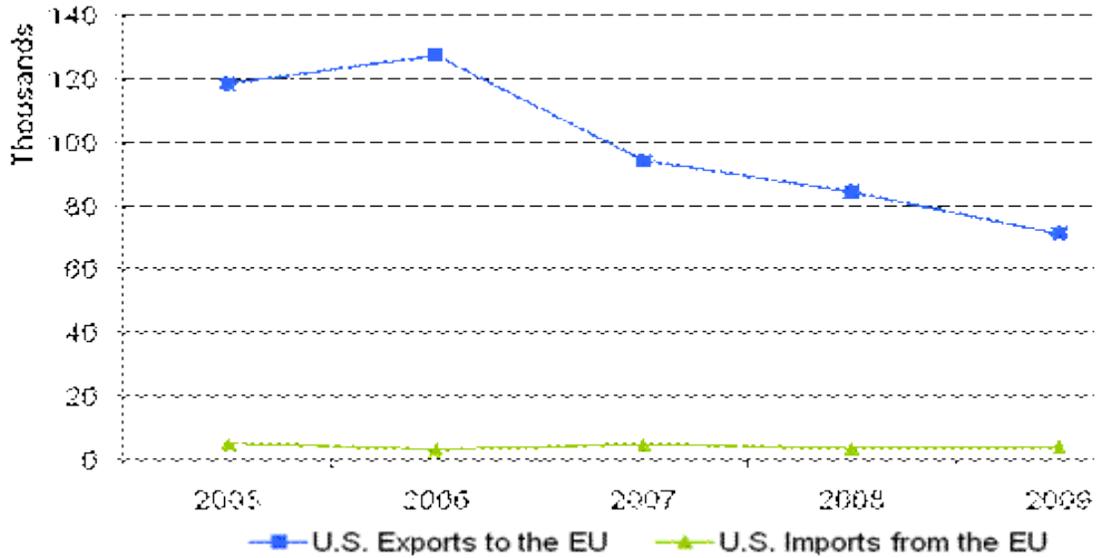
Global Agricultural Trade System; EU imports are from Global Trade Atlas

Fish Frozen and Whole Value 2005-09



Global Agricultural Trade System

Fish Frozen and Whole Quantity 2005-09



Global Agricultural Trade System

***Bovine Hides and Skins (HS 4101)***

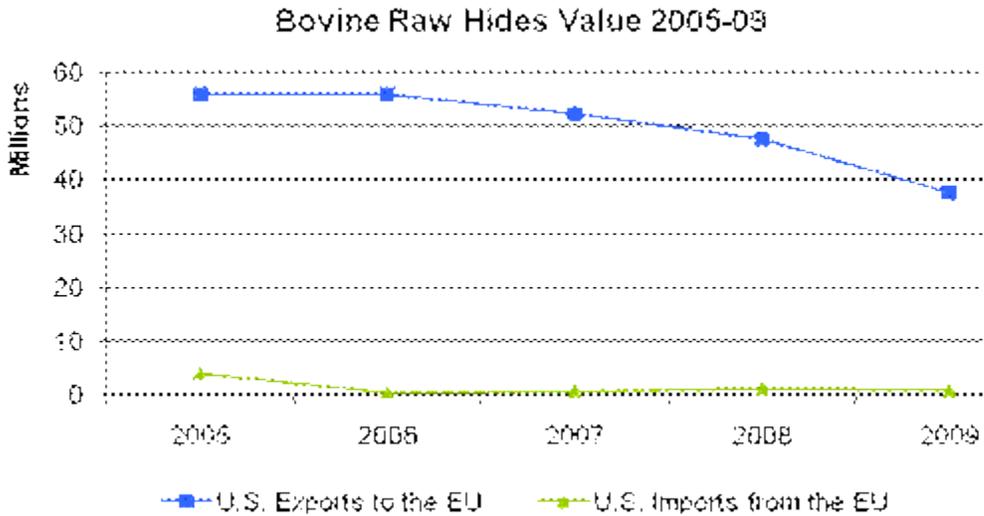
The United States extends a Yes (1) to EU bovine hides and skins while the EU has yet to evaluate this clause. U.S. exports of this commodity declined by 48.6 percent in value from 2005-09 while U.S imports from the EU fell by 387.1 percent.

**Bovine Hides and Skins Value and Quantity 2005-09**

<b>Bovine Raw Hides</b>		<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>Total</b>
<b>U.S. Exports to the World</b>	Value	\$1,387,078,491	\$1,557,046,878	\$1,773,639,346	\$1,642,434,532	\$1,174,185,648	\$7,534,384,895
	Quantity	0	0	0	0	0	0
<b>U.S. Exports to the E.U.</b>	Value	\$55,849,714	\$55,800,635	\$52,181,820	\$47,526,122	\$37,591,854	\$248,950,145
	Quantity	0	0	0	0	0	0
<b>U.S. Imports from the E.U.</b>	Value	\$4,093,416	\$502,269	\$764,629	\$1,097,789	\$840,333	\$7,298,436
	Quantity	0	0	0	0	0	0
<b>E.U. Imports from the</b>	Value	\$344,894,947	\$348,986,446	\$346,797,851	\$264,675,712	\$180,761,271	\$1,486,116,227
	Quantity	216	168	240	58	2	684

World							
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Global Agricultural Trade System; EU imports are from Global Trade Atlas



Global Agricultural Trade System

### ***Lard and Rendered Fats (HS 15)***

The U.S. gives the EU a combination of Yes 1 and Yes 2 for this commodity grouping, while the EU has yet to evaluate it. U.S. exports to the EU increased in value by 86.2 percent compared to U.S. imports from the EU, which rose by 22.4 percent during the same five-year period, 2005-09.

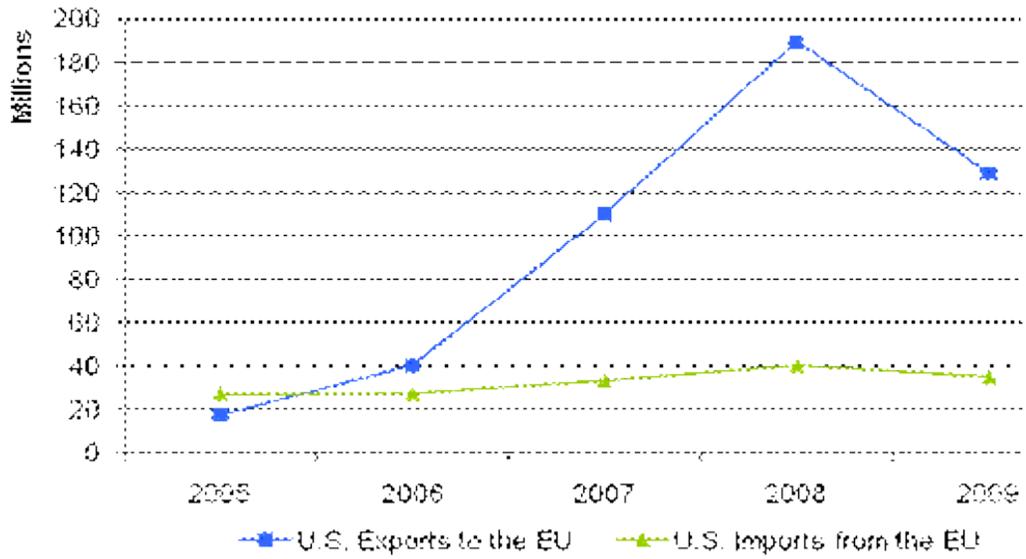
### **Lard and Rendered Fats Value and Quantity 2005-09**

<b>Lard and Rendered Fats</b>		<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>Total</b>
<b>U.S. Exports to the World</b>	Value	\$2,038,333,641	\$2,203,396,926	\$3,436,738,821	\$4,599,245,136	\$3,522,470,391	\$15,800,184,915
	Quantity	4,049,556	4,459,488	5,084,931	4,902,269	--	18,496,244
<b>U.S. Exports to the E.U.</b>	Value	\$17,802,928	\$40,224,500	\$109,851,402	\$189,212,812	\$128,794,264	\$485,885,906
	Quantity	17,038	58,950	86,734	125,843	109,018	397,583
<b>U.S. Imports from the</b>	Value	\$27,183,138	\$27,258,653	\$33,234,494	\$40,190,098	\$35,017,362	\$162,883,745
	Quantity	5,070	5,996	8,473	9,277	5,222	34,038

E.U.							
E.U. Imports from the World	Value	\$273,064,994	\$343,843,657	\$452,679,808	\$661,900,465	\$510,488,187	\$2,241,977,111
	Quantity	3,264	12,727	25,965	94,697	42,569	179,222

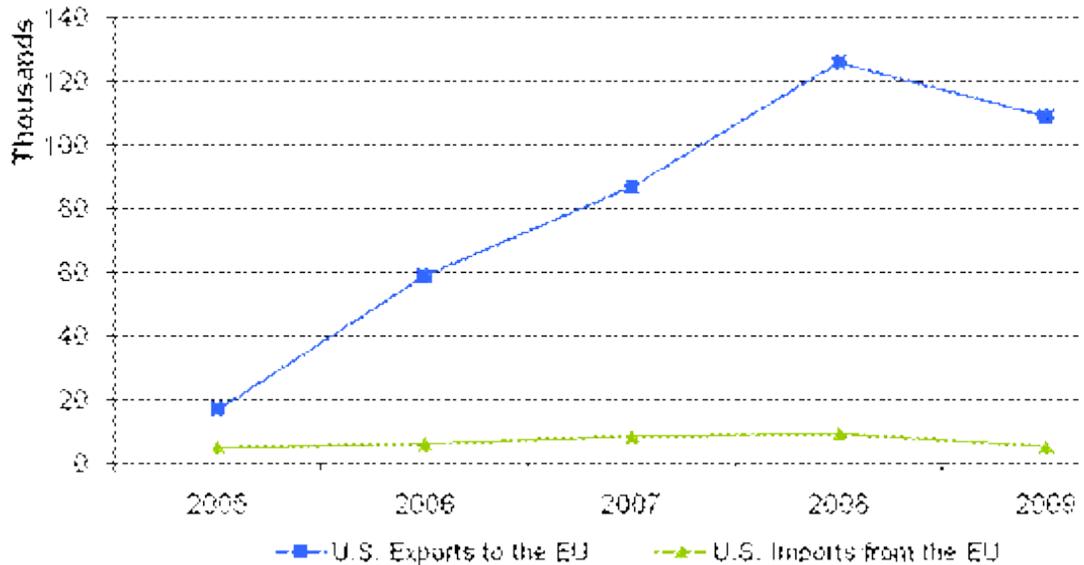
Global Agricultural Trade System; EU imports are from Global Trade Atlas

Lards and Rendered Fats Value 2005-09



Global Agricultural Trade System

### Lards and Rendered Fats Quantity 2005-09



Global Agricultural Trade System

### Animal Casings (HS 0504)

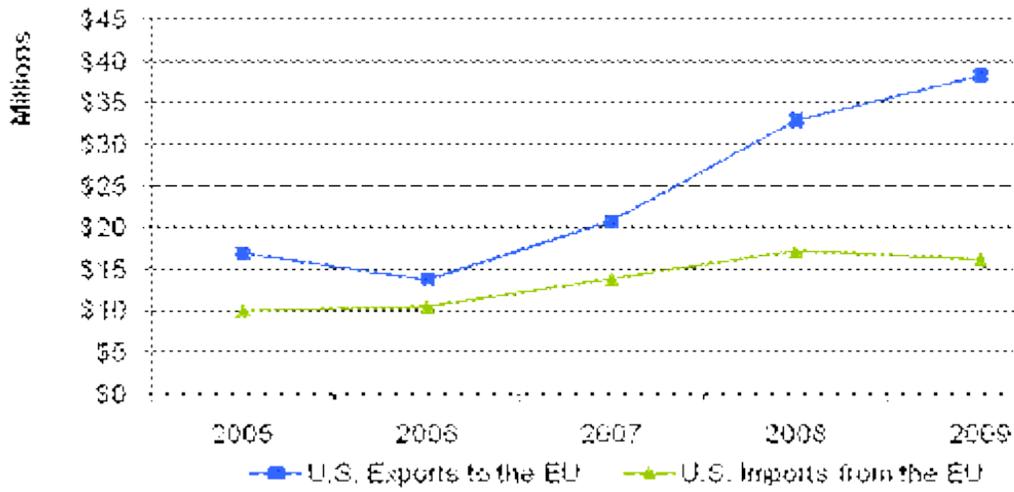
The U.S. extends Yes 2 level to the EU for this commodity while the EU has not evaluated it. U.S. exports to the EU increased in value by 55.8 percent and U.S. imports from the EU rose by 38.3 percent from 2005-09.

### Animal Casings Value and Quantity 2005-09

Animal Casings		2005	2006	2007	2008	2009	Total
U.S. Exports to the World	Value	\$431,116,361	\$491,729,390	\$589,682,035	\$774,100,282	\$458,542,640	\$2,745,170,708
	Quantity	183,831	195,330	210,056	250,384	153,956	993,557
U.S. Exports to the E.U.	Value	\$16,874,185	\$13,759,972	\$20,665,591	\$32,845,222	\$38,203,520	\$122,348,490
	Quantity	9,719	4,632	5,178	6,674	4,800	31,003
U.S. Imports from the E.U.	Value	\$10,008,055	\$10,544,265	\$13,846,769	\$17,177,607	\$16,213,442	\$67,790,138
	Quantity	2,026	2,319	2,836	2,400	1,573	11,155
E.U. Imports from the World	Value	\$750,509,078	\$725,931,033	\$770,026,195	\$1,117,391,375	\$1,028,132,279	\$4,391,989,960
	Quantity	8,016	5,220	2,480	1,503	3,242	20,461

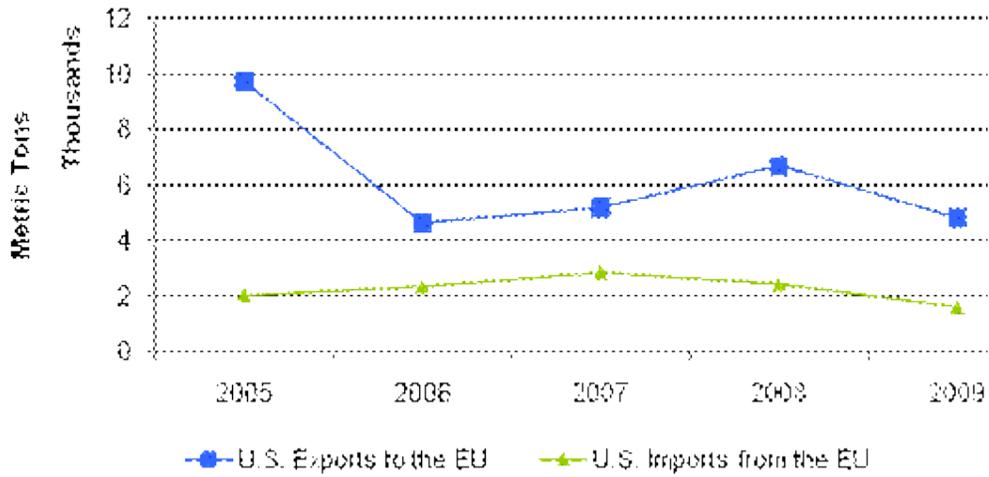
Global Agricultural Trade System; EU imports are from Global Trade Atlas

Animal Casings Value 2005-09



Global Agricultural Trade System

Animal Casings Quantity 2005-09



Global Agricultural Trade System

***Canned Pet Food (HS 2301 and 2309)***

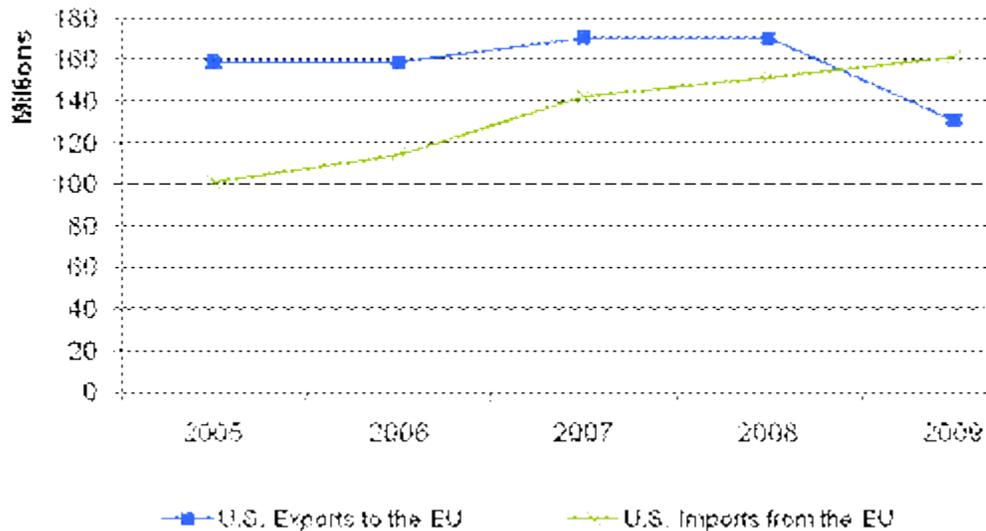
The U.S. offers Yes 2 for this commodity; the EU is still evaluating. U.S. exports to the EU declined by 21.5 percent in value from 2005-09 and the U.S. imports from the EU 37.4 percent during the same period.

### Canned Pet Food Value and Quantity 2005-09

Canned Pet Food		2005	2006	2007	2008	2009	Total
U.S. Exports to the World	Value	\$1,667,323,362	\$1,866,920,486	\$2,083,403,754	\$2,400,116,515	\$2,304,191,620	\$10,321,955,737
	Quantity	2,618,985	2,537,674	2,576,351	2,602,664	2,116,413	12,452,087
U.S. Exports to the E.U.	Value	\$158,756,017	\$158,455,261	\$170,598,756	\$170,115,750	\$130,715,374	\$788,641,158
	Quantity	374,462	307,953	160,493	141,964	83,661	1,068,534
U.S. Imports from the E.U.	Value	\$101,054,106	\$114,175,242	\$141,963,258	\$151,578,635	\$161,389,743	\$670,160,984
	Quantity	23,405	21,855	25,741	19,585	22,305	112,892
E.U. Imports from the World	Value	\$1,300,468,085	\$1,499,986,434	\$1,467,617,089	\$1,328,212,053	\$1,294,085,871	\$6,890,369,532
	Quantity	3,538,104	3,435,523	1,607,455	1,073,764	1,000,806	10,655,652

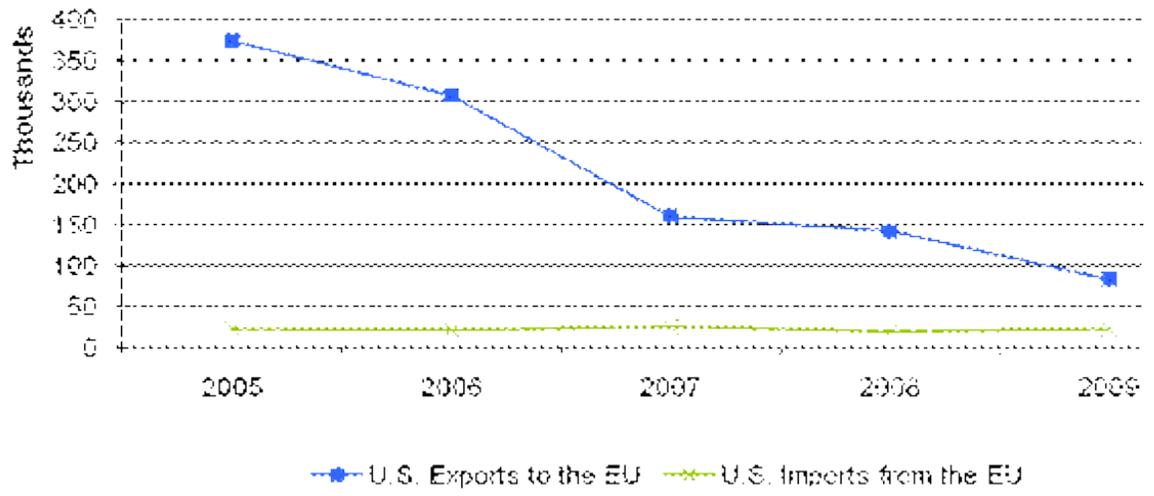
Global Agricultural Trade System; EU imports are from Global Trade Atlas

### Canned Petfood Value 2005-09



Global Agricultural Trade System

Canned Petfood Quantity 2005-09



Global Agricultural Trade System