

美国原皮市场情况

2010年全年的牛屠宰量维持了较快的增长。每季度牛屠宰量统计数字是十年来最高的。而此屠宰量还是建立在2010年1月1日出现的1951年以来最低存栏量的基础上的。另外，由于目前未育母牛的入栏量维持了与2010年1月相同的水平，因此2011年以后牛肉的产量可能出现降低。2011年1月1日，美国饲养牛的总量下降到9260万头，同比下降了1%。屠宰量则增长了3%，出产牛皮达到了3430万张，同比增长了3%。

美国2010年原皮出口数量达到3290万张，高于2009年的3140万张。2010年蓝湿皮出口也出现增长，达到710万张。出口额大幅增长至24.5亿美元，而2009年为14.6亿美元，同比增长了68%。这主要是由于全球经济复苏及原皮供不应求导致的。

美国原皮的前十大进口国占据了美原皮出口总量的97%。中国继续保持绝对领先地位，购买量达到1590万张，占出口总量的48%。美国原皮出口前五大市场为中国、韩国、中国台湾、墨西哥和欧盟。

美国原皮出口情况（单位：1000张）

国家	2006	2007	2008	2009	2010
世界	26827	28389	28525	31373	32919
中国及香港	13788	13847	15100	16710	15890
韩国	4661	4637	4550	5839	6091
中国台湾	2135	2408	2086	2078	2381
墨西哥	1721	1684	1525	2048	1978
欧盟	1848	1820	1513	1258	2165
泰国	685	1098	1003	1035	1368
越南	246	896	1089	651	1189
印度	47	117	155	165	125

USHSLA Hide Situation

Commercial cow slaughter maintained a high pace during all of 2010. Cow slaughter each quarter was the largest in well over a decade, as was the annual total cow slaughter. And this slaughter was based on the smallest January 1, 2010 U.S. cow herd since 1951. This, combined with total replacement heifer inventories at levels virtually unchanged from 2010 levels, sets the stage for a potential reduction in beef production in 2011 and beyond. On January 1, 2011 total cattle in the U.S. was down 1 percent from 2010 to 92.6 million head. Commercial slaughter was up 3 percent with total bovine hide production totaling 34.3 million in 2010.

U.S. hide exports in 2010 were up in numbers over 2009 to 32.9 million pieces, from 31.4 million pieces. Wet blue exports were also up in 2010, to 7.1 million pieces. Export value was up significantly from \$1.46 billion in 2009 to \$2.45 billion in 2010, a growth of 68%. This was due to global economic recovery as well as a decreasing supply of hides combined with increasing demand.

US hide exports to our top 10 markets account for 97 percent of U.S. exports. China continues to be the dominant importer, taking 15.9 million in 2010, accounting for 48 percent of U.S. exports. The top five markets for U.S. hide exports are China, S. Korea, Taiwan, Mexico and the E.U.

U.S. Hide Exports in 1000 pieces

Country	2006	2007	2008	2009	2010
World	26,827	28,389	28,525	31,373	32,919
China/HK	13,788	13,847	15,100	16,710	15,890
S. Korea	4,661	4,637	4,550	5,839	6,091
Taiwan	2,135	2,408	2,086	2,078	2,381
Mexico	1,721	1,684	1,525	2,048	1,978
EU	1,848	1,820	1,513	1,258	2,165
Thailand	685	1,098	1,003	1,035	1,368
Vietnam	246	896	1,089	651	1,189
Japan	1,108	1,201	912	725	844
India	47	117	155	165	125