

Over the years the North American beef industry has become increasingly integrated and **US feedlots and slaughter plants rely on Canadian and Mexican cattle for part of their supply.** Understanding the relative size of this supply helps create a context around the issue of cattle imports and inform the discussion. Now that we have the import data for the month of December, it is possible to calculate the final import cattle numbers for 2019, recognize trends and compare to the national supply data.

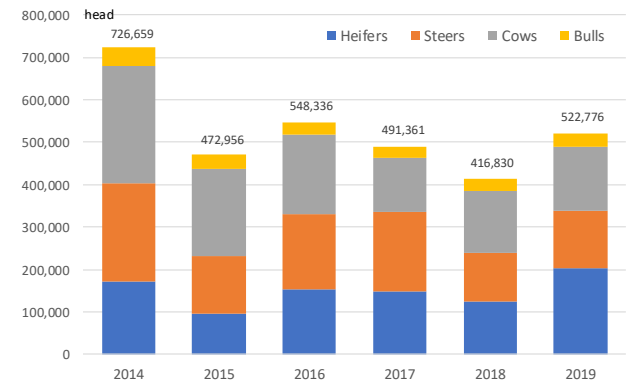
Most imports of slaughter-ready cattle that come to the US originate in Canada. In 2019, **US imports of slaughter cattle** from this market were 522,776 head (data source USDA-FAS), **105,946 head or 25.4% higher than the previous year but still well short of the supply that entered the US market in 2014.** The supply of slaughter cattle coming to the US from Canada has been relatively stable in recent years, ranging from 420k to 550k head per year. To put this in context, total US commercial cattle slaughter in 2019 was 33.550 million head. **Imports of Canadian slaughter ready cattle represented 1.6% of US cattle slaughter.** Much of the increase in Canadian imports was due to more heifers and cows being sent for slaughter in US plants. Slaughter heifer imports were 202,641 head, 63% higher than the previous year. The Canadian supply represented 2.1% of US heifer slaughter last year. Imports of Canadian slaughter cows were 149,043 head, 19% higher than last year and representing 2.3% of US cow slaughter.

While imports of slaughter cattle from Canada represent a rather small portion of the domestic supply, imports of feeder cattle from both Canadian and Mexican producers are more significant. While we have often looked at the total number of feeder cattle coming from these two countries, we thought it would be interesting to see also the type of feeder cattle that each country is sending to be finished in US feedlots. Mexico is by far the largest supplier of feeder cattle to the US market. Based on USDA-FAS data, we calculated that **total imports of feeder cattle from Mexico last year were 1.318 million head, 53k head or 4.1% higher than the previous year and almost 17% higher than the five year average.** Most of the feeder cattle coming from Mexico are steers and they are for the most part under 700 pounds. **Total steer imports from Mexico last year were 1.053 million head, 3.7% higher than a year ago.** Calves under 440 pounds (199kg) represented 43% of this supply while calves between 441 and 700 pounds represented 56%. Imports of Mexican female calves last year were 264k head, 5.8% higher than the previous year. Female calves under 440 pounds represented 16% of the total female calves imported while female calves between 441 and 700 pounds made up 82% of total female feeder cattle imports.

Even as imports of slaughter cattle from Canada have been relatively stable and were up last year, imports of **Canadian feeder cattle have been steadily declining and they are currently far smaller than a few years ago.** Total imports of feeder cattle from Canada in 2019 were 184,501 head, 7% lower than a year ago and only a fraction of the supply imported in 2014 (489.5k). Different from imports of Mexican feeders that include a fairly sizeable number of light calves, most of the feeders imported from Canada in 2019 were over 700 pounds. Combined imports of steers and heifers over 700 pounds were 135,463 head, 7% higher than the previous year and 73% of all feeder imports.

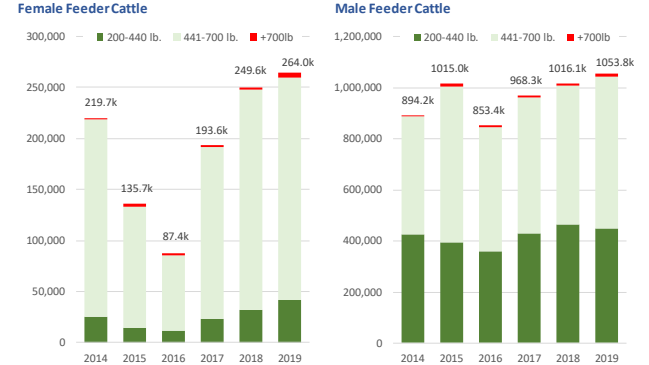
US Imports of Slaughter Type Cattle from Canada

Source: USDA-FAS based on Census Data. Analysis by Steiner Consulting



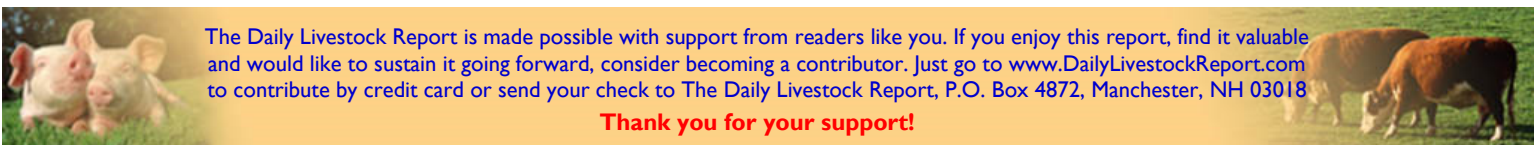
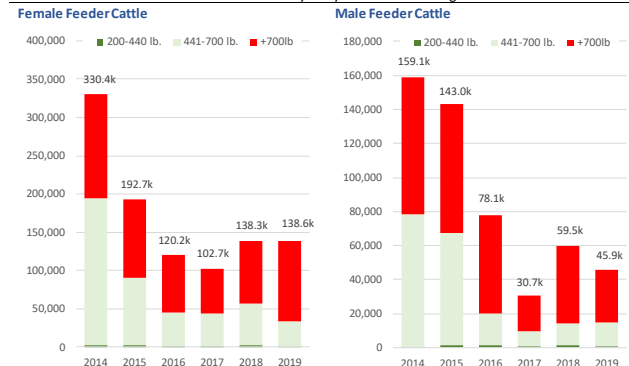
US Imports of Feeder Cattle From Mexico by Weight Group and Sex

Data Source: USDA-FAS based on Census. Analysis by Steiner Consulting



US Imports of Feeder Cattle From Canada by Weight Group and Sex

Data Source: USDA-FAS based on Census. Analysis by Steiner Consulting



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