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Strengthening Egyptian Pound to Ease Beef Prices, Consumption and Imports to Rise in 2018

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Report Highlights:

FAS Cairo forecasts calf crop production in 2018 to increase to 1.93 million head, up four percent from 1.85 million head in 2017. Beef consumption in 2018 is expected to reach 645,000 MT, up by 35,000 MT or six percent compared to 2017. Cattle imports will remain stable at about 250,000 head. Beef imports are however anticipated to grow to 280,000 MT, up by 30,000 MT or 12 percent compared to 2017. Post foresees the Egyptian government remaining the country's largest importer of live cattle and beef. Post is revising downward its 2017 consumption and import numbers from USDA's official data.

Production, Supply and Demand Data Statistics:

Animal Numbers, Cattle	2016		2017		2018	
Market Begin Year	Jan 2016		Jan 2017		Jan 2018	
Egypt	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Cattle Beg. Stocks	6725	6725	6995	6995	0	7205
Dairy Cows Beg. Stocks	4210	4210	4260	4260	0	4350
Beef Cows Beg. Stocks	0	0	0	0	0	0
Production (Calf Crop)	1850	1850	1850	1850	0	1930
Total Imports	300	300	250	250	0	250
Total Supply	8875	8875	9095	9095	0	9385
Total Exports	0	0	0	0	0	0
Cow Slaughter	700	700	710	710	0	730
Calf Slaughter	80	80	80	80	0	50
Other Slaughter	900	900	900	900	0	920
Total Slaughter	1680	1680	1690	1690	0	1700
Loss	200	200	200	200	0	200
Ending Inventories	6995	6995	7205	7205	0	7485
Total Distribution	8875	8875	9095	9095	0	9385
(1000 HEAD)						

Note: "New Post" data reflects FAS Cairo's assessments and are NOT official USDA data

Meat, Beef and Veal	2016		2017		2018	
Market Begin Year	Jan 2016		Jan 2017		Jan 2018	
Egypt	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference)	1680	1680	1690	1690	0	1700
Beginning Stocks	0	0	0	0	0	0
Production	357	357	360	360	0	365
Total Imports	340	340	300	250	0	280
Total Supply	697	697	660	610	0	645
Total Exports	0	0	0	0	0	0
Human Dom. Consumption	697	697	660	610	0	645
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	697	697	660	610	0	645
Ending Stocks	0	0	0	0	0	0
Total Distribution	697	697	660	610	0	645
(1000 HEAD) ,(1000 MT CWE)						

Note: "New Post" data reflects FAS Cairo's assessments and are NOT official USDA data

Production:

FAS Cairo forecasts calf crop production in 2018 to increase to 1.93 million head, up four percent from 1.85 million head in 2017. The government is pursuing increased domestic beef production. Post attributes the increase in overall calf numbers to the government's improved disease control measures

and immunization programs, as well as it setting minimum slaughter weights. The government is also controlling the cost of some animal feed input costs.

Post estimates the Egyptian cattle herd in 2017 at 9 million head (cows and buffaloes). Egypt's Ministry of Agriculture and Land Reclamation (MALR) in 2016 estimates the cattle herd to number 8.5 million (4.7 million cows and 3.8 million buffaloes) animals. The ministry to date has not yet released its 2017 estimate.

FAS Cairo forecasts Egyptian beef production reaching 365,000 metric tons (MT) in 2018, up 5,000 MT or 1.4 percent compared to 2017. We attribute this growth to a slight increase in cattle slaughter. Total slaughter in 2018 is forecast to reach 1.7 million head, up by 10,000 head or by less than one percent compared to 2017.

Government Efforts to Increase Local Meat Production

Egypt's parliament in February 2017 voted in favor of the cabinet's reshuffle. The measure approved the creation of a new deputy minister within the Ministry of Agriculture and Land Reclamation. The new Deputy Minister for Animal Wealth, Fisheries, and Poultry is tasked with improving the nation's livestock sector and expanding beef production.

New Slaughter Requirements

On February 13, 2017, the Minister of Agriculture and Land Reclamation Dr. Abdul Monaem El-Bana issued ministerial decree 72/2017. The decree prohibits the slaughter of live male cattle less than two years of age; however animals weighing 400 kilograms may be slaughtered. Imported cattle are excluded from this prohibition. The ministry previously prohibited the slaughter of live cattle weighing less than 250 kilograms. Sources indicate that the new measure will increase cattle numbers, improving overall beef production while easing beef prices.

The Deputy Minister is leading the nationwide animal disease vaccination campaign. The campaign also includes the registration and the tagging of the national cattle herd. The Deputy Minister's Office confirms that the government is enforcing the age-and-weight restrictions even with small farmers. The registration and tagging campaign counts with the full support of President Abdul Fattah Al-Sisi and Prime Minister Sherif Ismail Mohamed.

Expanded vaccination combined with registration and tagging is deemed of crucial importance for the control of infectious disease within the national cattle herd. Traceability of beef for public health reasons and livestock management stands to benefit. Enforcing the age-and-weight restriction may however pose a challenge for the government given the number and scale of cattle breeders.

The majority of Egypt's cattle breeders are small-scale farmers. Many of these are located in the smaller villages, where they depend on local butchers for slaughter. Operating largely in the informal economy, much of the slaughter occurs outside of registered facilities. In order to cut costly feed outlays, many of these smaller breeders are prone to move their animals to slaughter before reaching the age-and-weight requirements. It is too early to ascertain the impact of ministerial decree 72/2017 on smaller producers' practices.

Egypt's National Veal Project

In May 2017, Egypt's Ministry of Agriculture and Land Reclamation announced plans to renew the national veal project (first initiated in 1998). This project targets young farmers and recent graduates, providing them with loans for the purchase of cattle and feed. The ministry recently announced that the Principal Bank for Development and Agricultural Credits (PBDAC) has allocated Egyptian pounds (EGP) 300 million (\$16.7 million) to support the project. The bank amended its loan terms and conditions to encourage additional small-scale farmers to apply. Currently applicants are eligible for loans of up to EGP 400,000 (\$22,300). Companies and cooperatives are however eligible for amounts of EGP 2 million (\$111,000). The loans carry an interest rate of five percent.

On July 31, 2017, the ministry announced that the national veal project's board of directors has approved loans worth EGP 82.9 million (\$4.6 million) for the purchase of animals and feed. Ministry sources comment that 518 farmers have been lent EGP 59.8 million (\$3.3 million); 6,881 calves have now been purchased. The board has approved a new tranche of loans worth EGP 23.2 million (\$1.3 million) for the purchase of feed for over 4,600 head of cattle. Reportedly 434 applications (worth EGP 96.630 or \$5,368) are under review. Another 171 applications (worth EGP 19.339 or \$1,074) have just been completed and await final approval.

The ministry indicates that by the end of 2017, the project will have funded the purchase of roughly 75,000 head of cattle. This number is expected to double and reach a total of 150,000 animals by 2018. On August 8, 2017, PBDAC Chairman El-Sayed El-Kosyar confirmed that by month's end the total value of loans approved would reach EGP 100 million (\$5.5 million). The Chairman commented that due to the high demand for new loans, he is requesting that funding levels be raised to EGP 500 million (\$27.9 million). The project assists small-scale farmers and breeders in raising animals to mandated slaughter weights.

Disease Control

Egypt continues to actively pursue foot-and-mouth disease (FMD) vaccination. On July 26, 2017, the MALR reported that 3.274.469 million head of cattle were vaccinated against foot-and-mouth disease. Vaccination is a key component of the ministry's campaign to register and tag the national cattle herd.

The Ministry of Agriculture and Land Reclamation's report details that between January and March 2017, there were 1,287 cases of foot-and-mouth disease. The report confirms that 183 animals were lost due to foot-and-mouth disease. Egypt's cattle herd was seriously hit in 2012 with an outbreak of FMD; over 1 million head of cattle were lost. Since that outbreak, the ministry has proactively led an annual vaccination campaign against FMD and other epidemic diseases (e.g., Rift Valley Fever).

The Million Cattle National Project

In 2016, President Abdul Fattah Al-Sisi declared that Egypt needed to increase its dairy and meat production. The president envisions the national cattle herd expanding by over 1 million animals. In early 2017, President Al-Sisi confirmed that out of the EGP 100 billion (\$5.6 billion) budgeted for herd expansion, some EGP 5 billion (\$281 million) has now been spent on equipping cattle farms. To date over 24,000 head of live cattle have been imported from Brazil and Uruguay. The goal is to achieve this expansion in herd numbers within the next two years.

The Ministry of Agriculture and Land Reclamation announced that it is launching the project with a pilot production model in nine areas within the Al-Nubaria region (Governorate of Beheria, North Cairo). The project will start with some 200,000 head of dairy and fattening cattle. It will include a milk processing factory, as well as slaughter facilities. Additional facilities will be rolled out to other governorates over the next couple of years. Given that most of the cattle will be imported, the project's success hinges on the Egyptian pound strengthening.

Cattle Producers & Input Costs

In July 2017, the Ministry of Supply and Internal Trade (MoSIT) confirmed that it is resuming fixing annual indicative prices for grain miller's bran (i.e., corn, wheat, and rice). This measure reverses the earlier 2013 decision, which had allowed market forces to determine prices. Farmers are embracing the decision believing that this will help control their animal feed prices.

Prior to 2013, the MoSIT fixed grain miller's bran price at EGP 1,200-1,300/MT (\$67-\$72/MT). Following the decision to let the market determine prices, the cost of grain miller's bran climbed in 2014 to EGP 1,700/MT (\$95/MT). By July 2017, prices have reached EGP 4,000/MT (\$223/MT). The decision to set an indicative price for grain miller's bran, along with the strengthening of the Egyptian pound, should bring a measure of relief to cattle breeders.

Egypt aims to expand yellow corn production acreage to 400,000 hectares with the 2018 crop. The Ministry of Agriculture and Land Reclamation indicates that by October 2017, the first stage for producing an additional 1 million metric tons (MMT) will be met. Egypt usually produces around 6 MMT of yellow corn per annum; it imports about 8.5 MMT to cover the feed industry's needs. Corn acreage expansion is a key priority for the government, which aims to cut back on feed ingredient imports to conserve hard currency reserves. The ministry seeks to increase yields per unit area, while also pushing farmers to replace illegal rice fields with new yellow corn plantings (see, [GAIN EGYPT: Grain & Feed Annual Report 2017](#)).

Cattle production is constrained by high production input and feed costs. Egypt is a net importer of feed ingredients (i.e., grains, milling byproducts, added vitamins, minerals, fats/oils, and other nutritional and energy sources) for livestock and meat production. Sixty percent of its primary feed ingredients (i.e., corn and soybeans) are imported. High world feed prices, combined with the Egyptian pound's devaluation has increased the price of imported feed ingredients.

Consumption:

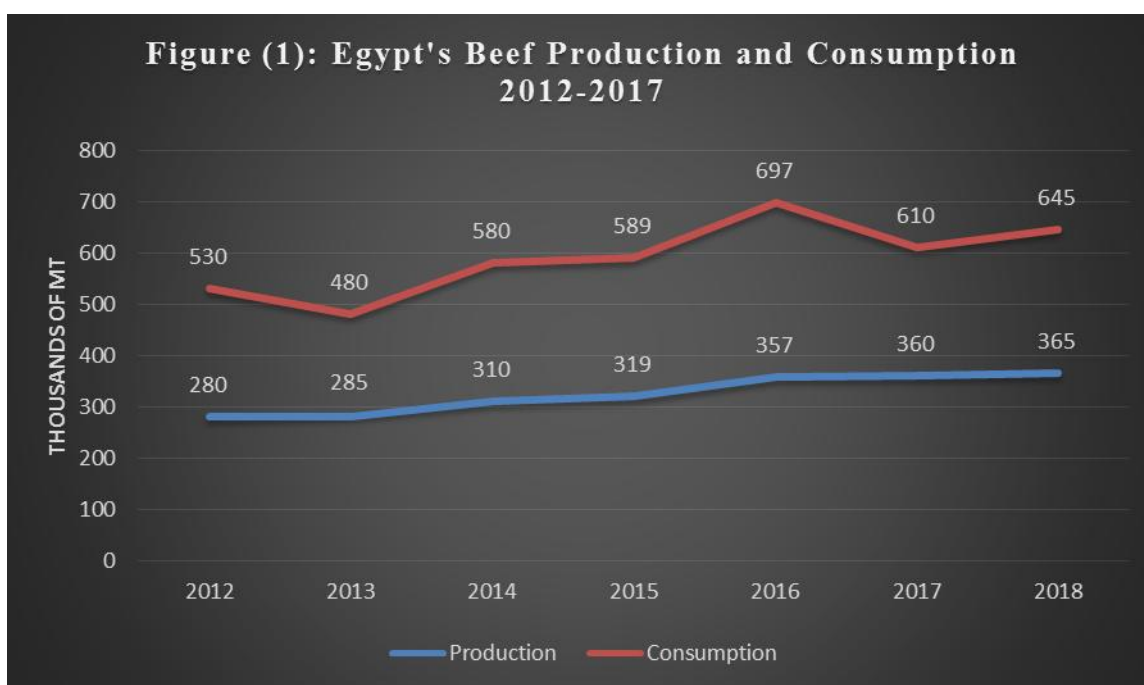
FAS Cairo forecasts Egyptian beef consumption reaching 645,000 MT in 2018, up 35,000 MT or growing by six percent compared to the 2017 estimate. Post is revising downward its 2017 consumption figure to 610,000 MT from the USDA's official estimate of 660,000 metric tons. We are revising the consumption figure due to consumers scaling back their purchases of beef in the wake of the Egyptian pound's 2016 devaluation.

Post attributes the 2018 consumption increase to expanded beef supply. This expansion is due to an increase in total animal slaughter, as well as due to imports growing based on the expectation of a drop

in meat prices. Egyptian beef consumption is driven by the availability of affordably priced beef. The majority of Egyptians are low-income consumers. Beef consumption is tied to (low) cost, not on a consumer calculation premised on the recommended daily intake of protein.

Egyptians prefer beef to other types of meat (i.e., poultry and lamb). Domestic consumers also prefer fresh over frozen beef for cultural reasons. Red meat consumption is comprised mainly of locally produced fresh meat, imported ready-for-slaughter cattle, imports of frozen buffalo meat from India, and frozen beef (primarily from Brazil). More affluent consumers view frozen imported beef as being an inferior product. Their opinion is premised on the fact that the bulk of frozen imported beef are low-quality cuts sold at government outlets at discounted prices.

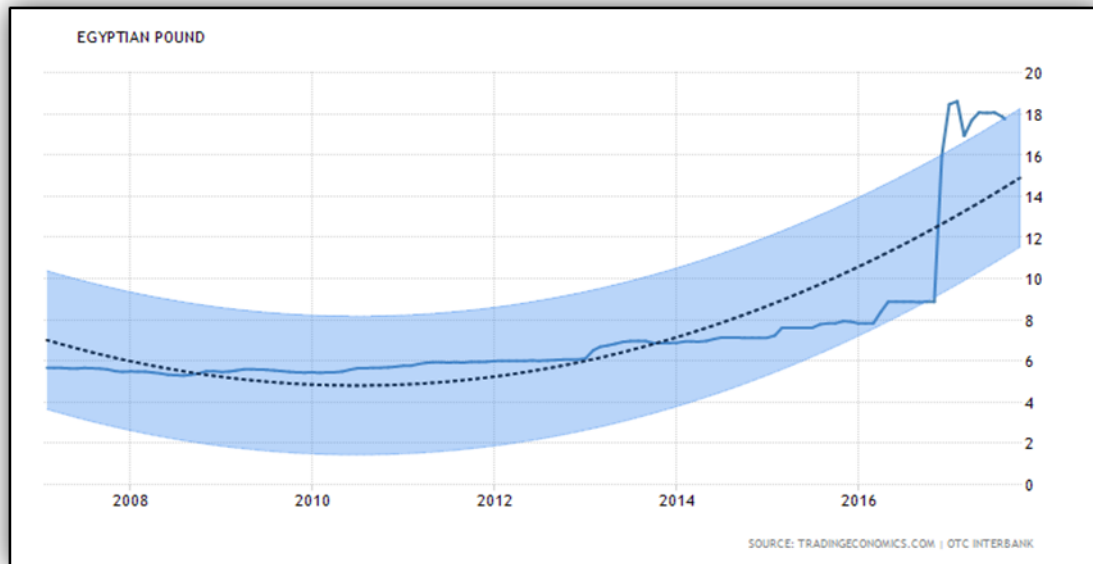
Impact of the Devaluation on Beef Production and Consumption



On November 3, 2016, Egypt's Central Bank floated the Egyptian pound to stabilize the economy hamstrung by a shortage of U.S. dollars. The devaluation of the pound was one of the key recommendations made by the International Monetary Fund in order for Egypt to receive a \$12 billion loan over three years. The currency was devalued to EGP 13 per USD 1 as an indicative price from the pegged rate of EGP 8.88 per USD 1. The Egyptian pound has since slipped further, trading at EGP 17.9 per USD 1 as of mid-August 2017. This resulted in a significant increase in imported cattle and frozen beef prices, as well as imported feed costs.

Devaluation impacted beef consumption in 2017, the ensuing price surge led to a consumption drop of 12.5 percent or 87,000 metric tons. Since then the price of live cow for slaughter claimed to EGP 60/kilogram (\$3.30) compared to EGP 40/kilogram (\$2.20) in 2016. Similarly live buffalo for slaughter now goes for EGP 51/kilogram (\$2.80) compared to 2016's EGP 37/kilogram (\$2.00).

Figure (2): Egyptian Pound to U.S. Dollar Exchange Rate - 2008 to 2016



The rise in live cattle prices is impacting Egyptian (Muslim's) ability to sacrifice animals during the Islamic Al-Adha (early September) holiday. Muslims normally will sacrifice a domestic animal, usually a young bull, but depending on the region and financial means it can also be a camel, goat or a sheep. The meat from the sacrificed animal is divided into three parts: one third for the family; another third goes to relatives, friends, and neighbors; and the remaining third is given to the poor. During last year's Al-Adha feast, live cattle was sold at EGP 7,000-12,000 (\$391-\$670), this year Post is seeing prices in the EGP 15,000-18,000 (\$837-\$1,000) range.

The media reports that in 2017 many Egyptian Muslims will refrain from offering live sacrifices. Others plan to share the cost of an animal between as many as seven persons, especially in the case of cattle and camels. Charities and foundations are helping with sacrificial cost, providing financing over a 12-month period. The government is also helping with animal prices, providing cattle at EGP 55/kilogram (\$3.00) and EGP 50/kilogram for live buffalo. However, the 49,000 head of cattle provided by the MALR and the MoSIT falls short of total popular demand.

Domestic beef sells at EGP 120-180/kilogram (\$6.70-\$10.00), before the 2016 devaluation prices ranged between EGP 80-120/kilogram (\$4.40-\$6.70). Sudanese chilled beef sells at EGP 90/kilogram (\$5.00) compared to EGP 65/kilogram (\$3.60) in 2016. Brazilian frozen beef is offered at EGP 60-70/kilogram (\$3.30-\$4.10) compared to EGP 45/kilogram (\$2.50) in 2016. Ukrainian and Spanish fresh beef has an average price of EGP 60/kilogram (\$3.30).

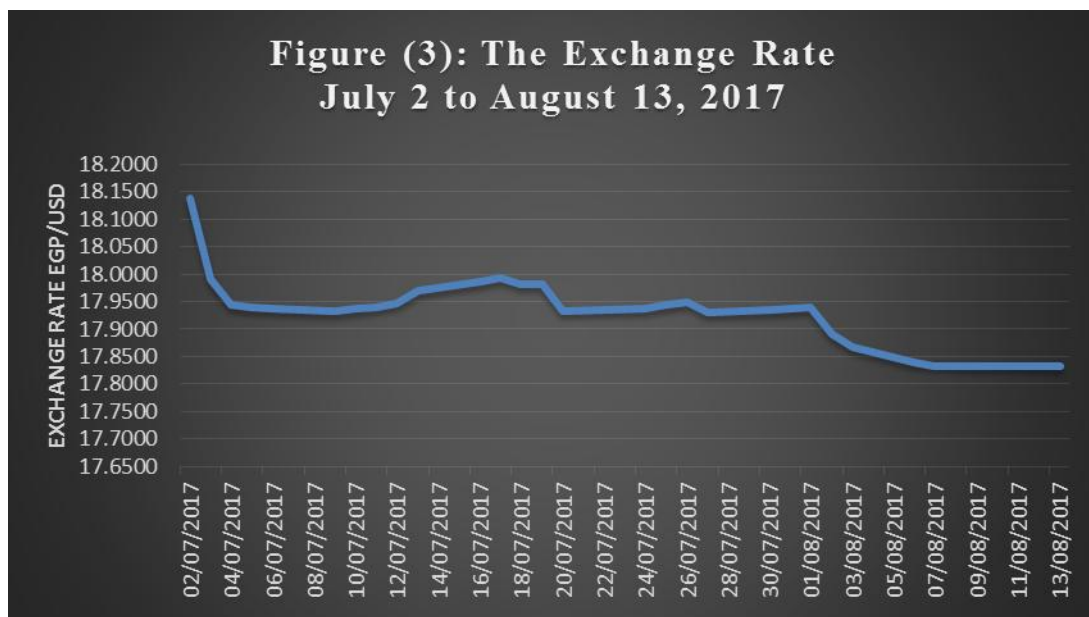
The government is providing fresh and frozen beef to food subsidy beneficiaries (see, [GAIN EGYPT: Livestock Annual 2014](#)). Egypt provides low-income consumers EGP 50 (\$2.80) monthly per family

member. Beneficiaries use subsidy smart cards to purchase food commodities. The Ministry of Supply and Internal Trade offers subsidized products at 25,000 (private) stores and at 4,000 MoSIT's Holding Company for Food Industries (HCFI) complexes.

MoSIT's HCFI shops are not immune to beef price increases. Post sees HCFI shops' Sudanese chilled beef going for EGP 85/kilogram (\$4.70) compared to EGP 60/kilogram (\$3.30) before the devaluation. Brazilian frozen beef is offered at EGP 69/kilogram (\$3.80) compared previously to EGP 50/kilogram (\$2.80). The ministry announced it is dropping at HCFI shops fresh beef prices to EGP 60/kilogram for the Al-Adha holiday. The Ministry of Defense (MoD), which owns hundreds of wholesale cooperatives, and the MALR also are offering beef at MoSIT-HCFI equivalent prices.

Table (1): Meat Prices Before and After the Devaluation					
Product	Before the Devaluation		August 2017		
	EGP	USD	EGP	USD	% Increase
Live Cow	40	2.23	60	3.35	50%
Live Buffalo	37	2.07	51	2.85	37.8%
Fresh Local Cow Meat	80-120	4.4-6.7	120-180	6.7-10	50%
Sudanese Chilled Beef	65	3.63	90	5.03	38.4%
Brazilian Frozen Beef	45	2.51	75	4.10	66.6%
Sudanese Chilled Beef at MoSIT Shops	60	3.35	85	4.75	41.6%
Brazilian frozen Beef at MoSIT Shops	50	2.79	69	3.85	38%
Prices are per kilogram		Source: FAS Cairo office research.			

FAS Cairo expects beef prices to improve in 2018 as the pound strengthens. The International Monetary Fund indicates that Egypt, by devaluing the pound, has established a well-functioning currency market. Expectations are that the pound will strengthen and recover after the initial post float period. Analysts foresee the pound strengthening to EGP 16.6-17.1 against the dollar by December 2017. Speculators are betting that the exchange rate will go to EGP 14-15 to the dollar by 2018, which may generate a drop in beef prices and increase in beef consumption.



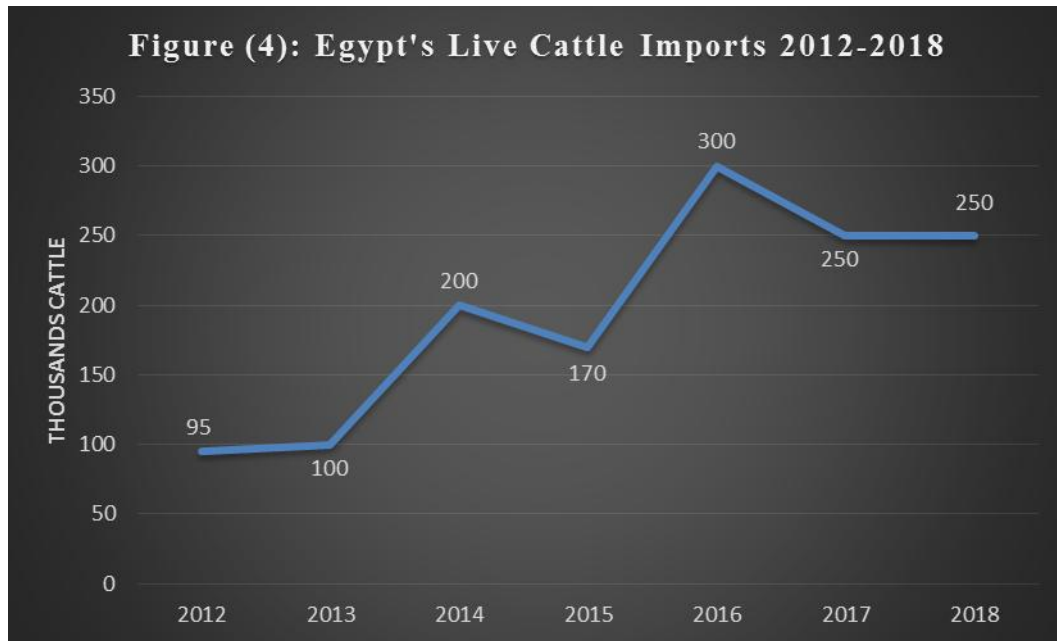
Source: Central Bank of Egypt

Trade:

The political upheavals of 2011 forced importers to turn to the parallel market; the black market commanded a 30-40 percent premium over the official exchange rate. The government also sought to limit foreign currency deposits (which were only eased in 2016-17). Commercial banks today are now better positioned to offer dollars, but at over twice the pre-devaluation peg rate of EGP 8.88 to the U.S. dollar. With the halving of the pound's value, private importers are being pushed out of the market. Government ministries such as the MoSIT, MALR, and the MoD have now become Egypt's largest importer of live cattle and frozen beef.

Live Cattle Imports

Post forecasts total live cattle imports in 2018 to remain stable at about 250,000 head. Sudan and Brazil are the biggest suppliers of live cattle (mainly for immediate slaughter). Other suppliers include Spain, Germany, Ukraine, Hungary and the United States. In 2018, we foresee Sudan and Brazil remaining the top suppliers of live cattle for immediate slaughter.



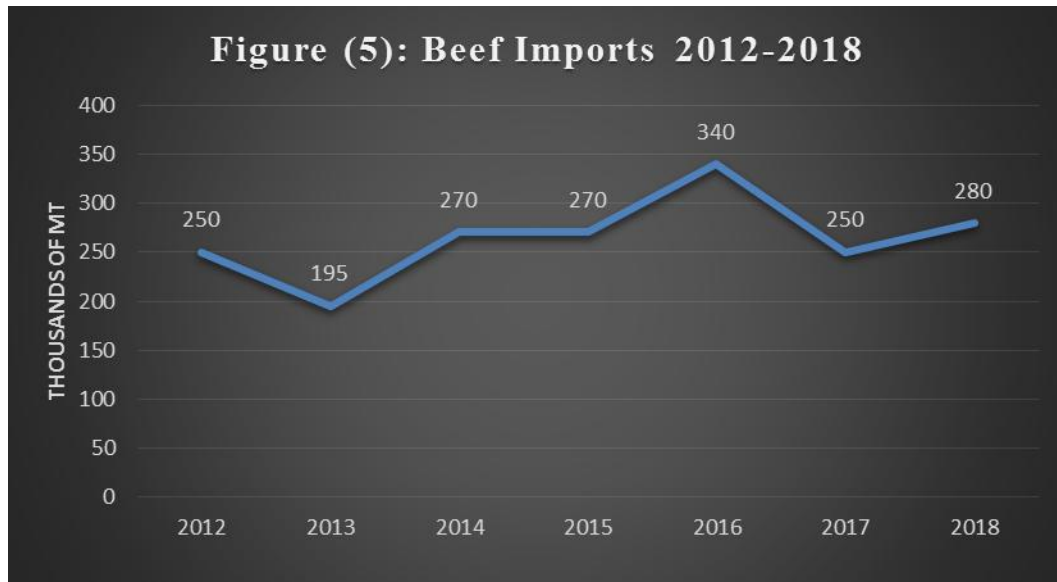
The majority of Egypt's live cattle for immediate slaughter originate in Africa (mainly Sudan, Ethiopia, and Somalia). Re-invigorating relationships with the African continent's politics is one of Cairo's key foreign policy priorities. Egypt is seeking to safeguard its interests on the continent through the establishment of deeper trade ties and greater investment. Egypt's cattle diplomacy in 2015 led to the purchase from Sudan (over three years) of 800,000 head of live cattle valued at EGP 1.3 billion (\$166 million).

U.S.-origin live cattle are highly regarded among Egyptian importers and government officials. U.S. Holstein dairy cattle for milk production are the country's preferred breed. One of Egypt's largest dairies uses higher milk producing U.S.-bred heifers exclusively. However, U.S. heifers command higher purchase and shipping costs compared to those of other origins. Egypt has not imported any live U.S. cattle since 2013. In 2013, Egypt imported 1,386 head of female dry cattle compared to 3,135 head of purebred female breeding cattle in 2012.

Beef Imports

FAS Cairo forecasts Egyptian beef imports to reach 280,000 MT in 2018, up 30,000 MT or growing 12 percent compared to 2017. Post is revising downward its 2017 import figure to 250,000 MT from USDA's official estimate of 300,000 MT. We are revising the import figure due to the challenges importers are facing as a consequence of the 2016 devaluation.

Post is attributing 2018's import increase to a rebound in domestic consumption brought about by an anticipated drop in prices. We foresee imports bridging the gap between production and consumption. Brazil is expected to stay Egypt's main supplier of frozen beef, while India will remain the country's sole supplier of frozen buffalo meat. Other frozen beef suppliers include Denmark, Australia, United States, New Zealand, Ukraine, South Africa, Poland, and Romania.



Egypt-United States Beef Trade

In 2016, the United States exported only 353 MT of beef (\$2.65 million) compared to 1,006 MT (\$5.8 million) and 1,023 MT (\$4.9 million) in 2014 and 2015, respectively. Most of U.S. frozen beef exports to Egypt are high-quality beef cuts used primarily by the hotel and restaurant sectors. Post attributes the drop of U.S. beef exports to Egypt to the decline in tourism combined with foreign exchange challenges since the 2011 revolution.

Table (2): U.S Exports of Beef to Egypt compared to Number of Tourists Visiting Egypt			
Year	Number of Tourists	Value	Volume
2008	12.296	\$12.930	7,623
2009	11.914	\$23.465	14,281
2010	14.051	\$78.451	28,673
2011	9.497	\$94.251	33,814
2012	11.196	\$80.306	32,209
2013	9.174	\$37.013	17,363
2014	9.628	\$5.818	1,006
2015	9.139	\$4.924	1,023
2016	5.4	\$2.650	353
Source: Value & Volume GTIS and Tourist Numbers World Bank Number of Tourists in million Value in 1000 USD & Volume in Metric Ton			

FAS Cairo believes that with a stronger Egyptian pound in 2018 and the return of tourism industry, U.S. exports of frozen beef will recover. The Central Bank of Egypt reports that tourism receipts tripled in the last three months of this fiscal year. Tourism revenue rose to \$1.5 billion in the fourth quarter that ended June 30, 2017, from \$510 million in the same period a year ago. From January through June 2017, U.S. exports of frozen beef increased by valued to \$1.2 million compared to \$1.1 million during the same period last year.

Egypt is the largest market for the U.S. frozen beef liver and offal. In 2016, the U.S. exported 92,869 MT of frozen beef liver and offal (\$99 million). Between January and June 2017, U.S. exports of frozen beef livers and offal reached 38,262 MT (\$11 million).

Egypt-Brazil Beef Trade

Brazil is Egypt's largest supplier of frozen beef. In 2016, Brazil exported 106,272 MT (\$335 million) of frozen beef compared to 85,345 MT (\$297 million) in 2015. Between January and June 2017, Brazilian exports of frozen beef reached 40,000 MT (\$142 million).

In March 2017, Egypt temporarily halted all Brazilian meat imports until they were confirmed to be safe for human consumption. The announcement followed an investigation by Brazilian authorities into its meat packing industry. Police have accused over 100 people, mostly health inspectors, of taking bribes for allowing the sale of rancid products, falsifying export documents or for failing to inspect meatpacking plants. However, a few days following the announcement the MALR resumed imports after having obtained assurances of the safety of the meat for human consumption. The ministry confirmed it only resumed imports from authorized Brazilian slaughter facilities, subjecting shipments to inspections at origin and destination. The ministry indicated that none of the accused slaughter facilities had exported to Egypt in previous years.

Egypt-India Beef Trade

India is the sole supplier of frozen buffalo meat to Egypt. Trade sources indicate that in 2016, India exported to Egypt 36,000 MT (\$103 million) of frozen buffalo meat compared to 18,816 MT (\$56.5 million) in 2015. However, the Ministry of Agriculture and Land Reclamation's General Organization for Veterinary Services (GOVS) clarifies that Egypt's 2016 imports of frozen buffalo meat from India were actually approximately 90,000 metric tons.

Egypt-Ireland Beef Trade

Early 2017, Ireland announced that it signed an agreement with Egypt to export Irish beef and offal. Irish meat had previously been banned by Egypt since the late 1990s as part of the ban of European Union (EU) countries due to the outbreak of *spongiform encephalopathy* (i.e., mad cow disease). Since 2001, Egypt has allowed the conditional lifting of the ban. The ban was further eased in February 2016, following an inspection visit to Ireland by MALR's Veterinarian Authority. Both countries have agreed to live exports of cattle from Ireland to Egypt. Ireland's Department of Agriculture affirms that once the technicalities are finalized, five Irish plants will commence exporting beef to Egypt.

Beef Plant Audits and Halal Issues

The General Organization for Veterinary Services conducts individual plant audits to determine the

eligibility of beef plants to export to Egypt. All [approved facilities](#) are subject to re-auditing every three years in order to renew eligibility to export to Egypt. The audits evaluate both food safety and halal practice (in accordance to the Islamic rules and principles).

Islamic Centers in the United States, as well as those in other trading partners are responsible for issuing the Islamic halal certificate required by General Organization for Veterinary Services. The Islamic Centers must have a representative present at the slaughter facilities to confirm halal slaughter.

General Organization for Veterinary Services veterinarians have audited and approved 57 U.S. beef slaughter facilities. Audits are conducted in cooperation with the U.S. Meat Export Federation.