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MEAT MARKET REVIEW

Overview of market and policy developments 2021

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HIGHLIGHTS

- International meat prices increased sharply in 2021 amid tight global supplies from leading exporters.
- World meat output expanded, principally driven by increased pig meat output.
- Global meat trade expanded in 2021, albeit at a slower pace than in the previous five years.

Global meat prices

International meat prices rose amid tight global supplies from leading exporters

International meat prices, measured by the FAO Meat Price Index averaged 107.7 in 2021, up 12.2 points (12.7 percent) from 2020. In 2021, ovine, bovine, and poultry meat sub-indices registered sharp increases, while the pig meat sub-index remained largely unchanged.

Tight supplies from leading exporting countries underpinned the 2021 international meat price increases. These tight supply conditions emerged due to the challenging production environment faced by many countries. Bovine meat supplies were exceptionally tight, reflecting the short supply of cattle for slaughter in South America due to lower cattle inventories, and in Oceania, amidst high herd rebuilding demand. Meanwhile, the continued impacts of the African Swine fever and increased production costs and market uncertainties across many key exporting regions, constrained production growth and pig meat deliveries. In addition, the poultry sector faced Highly Pathogenic Avian Influenza (HPAI) outbreaks in Asia and Europe, curtailing production and export growth. Similarly, ovine meat exports from Oceania, the world's largest exporter, remained limited due to high flock rebuilding demand. Increased input costs, mainly feed and energy costs, logistical hurdles and freight costs, discouraged meat producers across many countries, reducing meat production growth.

On the demand side, China continued to be the largest meat importer, accounting for 26 percent of global meat imports in 2021, despite a decline in pig meat imports. Imports of other large meat importing countries, namely, Mexico, the United States of America (the United States), the Republic of Korea and Japan remained strong, driven mainly by increased economic activities and the revival of the hospitality industry with increasingly relaxed social-distancing requirements and successful COVID-19 vaccination campaigns.

Figure 1. FAO Meat Price Indices

(2014-2016=100)

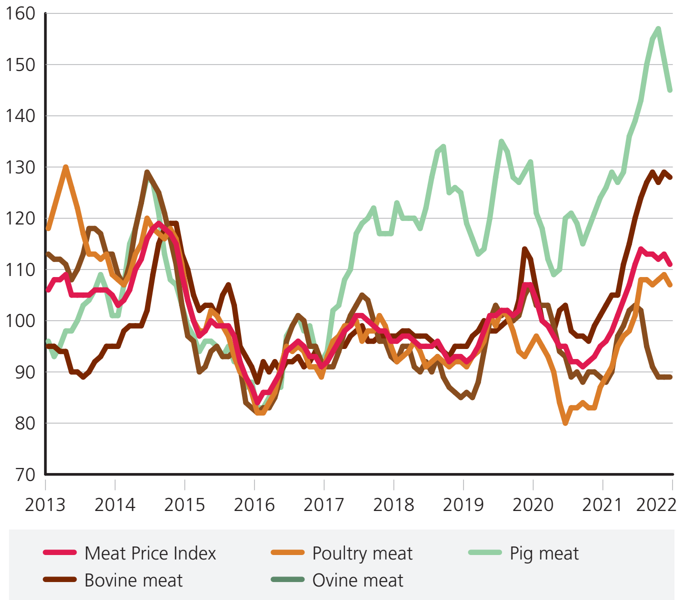
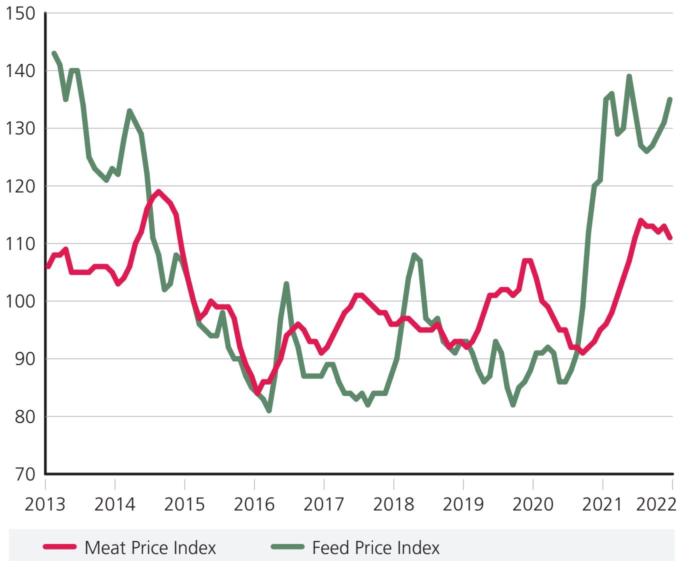
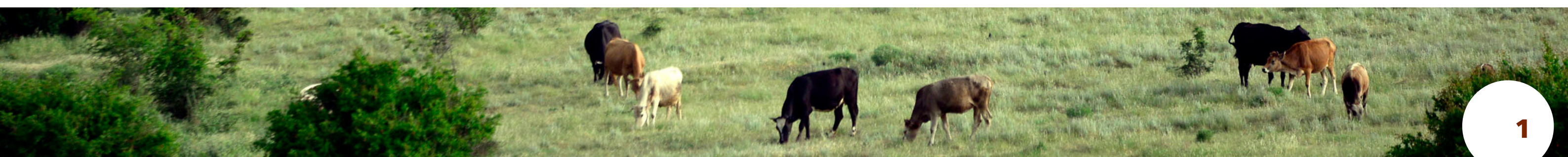


Figure 2. FAO Meat and Feed Price Indices

(2014-2016=100)





World total meat production and trade

Global meat production expanded, but trade growth slowed down

World total meat production[1,2] reached 355.5 million tonnes (in carcass weight equivalent) in 2021, up 4.5 percent from 2020. Increased pig meat output underpinned the total meat production expansion, with poultry meat making the second-highest volume gain, followed by bovine and ovine meats.

Following the ASF virus outbreak in 2018, China's pig herd registered a faster-than-anticipated recovery, lifting global pig meat output in 2021. In many countries, poultry meat output also increased, induced by elevated demand for low-cost alternatives. Meanwhile, bovine meat output expanded, albeit slowly, underpinned by production expansions in Asia, North America and Central America and the Caribbean, offset by declines in South America and Oceania due to lower cattle supplies. Ovine meat output expanded mainly in Asia.
Regionally, Asia dominated the global meat output expansion, with some increases also registered in the Americas and Africa, while those in Europe remained stable but declined in Oceania.

China recorded the highest meat production expansion in 2021, followed by some gains in **Brazil, India, Türkiye, Myanmar, Pakistan, Indonesia** and **Viet Nam**, among others, but offset by declines in the **Philippines, Argentina, Australia**, and the **United Kingdom of Great Britain and Northern Ireland (the United Kingdom)**. In **China**, farm consolidation favouring large-scale farms, new feed management and breeding technologies have helped large-scale farmers to excel in productivity growth. By contrast, animal diseases, especially ASF, HPAI and foot and mouth disease, dented growth in meat production across many countries. Increased feed, fertilizer, and energy costs squeezed producer margins, causing production growth to subside in some countries. On the demand side, global demand for meat products expanded, reflecting increased economic activities in parallel with increasingly relaxed social-distancing requirements, improvements to supply chains disrupted by the pandemic, growing incomes and rising populations.

Figure 3. Global meat production by type

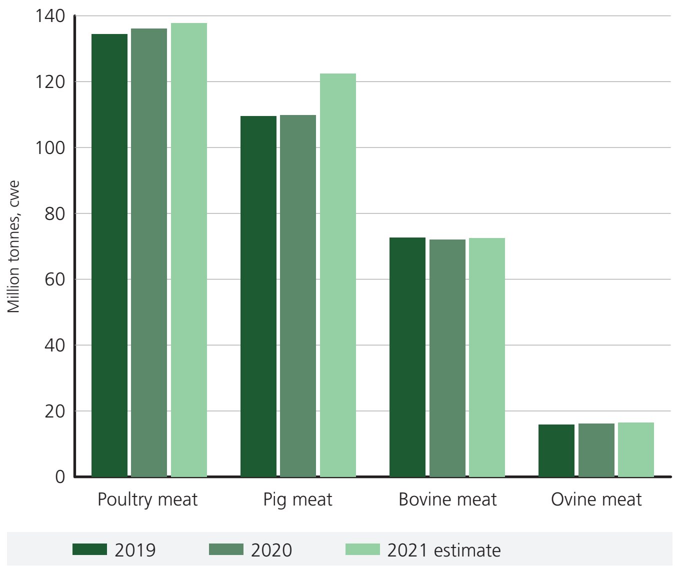
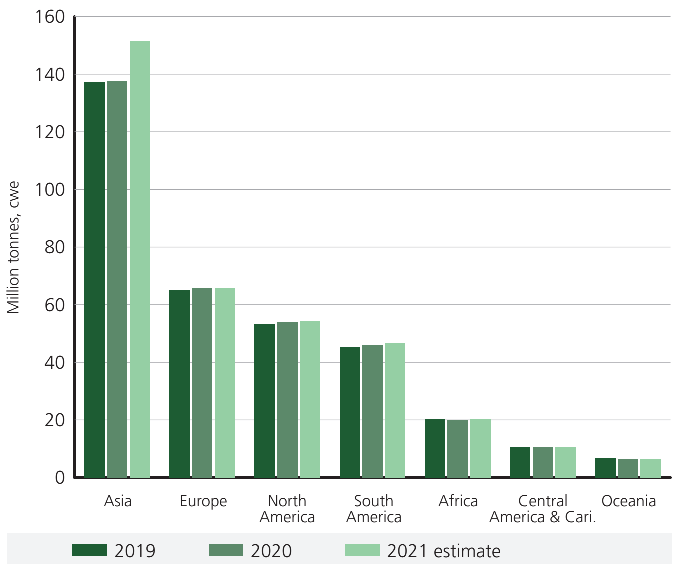
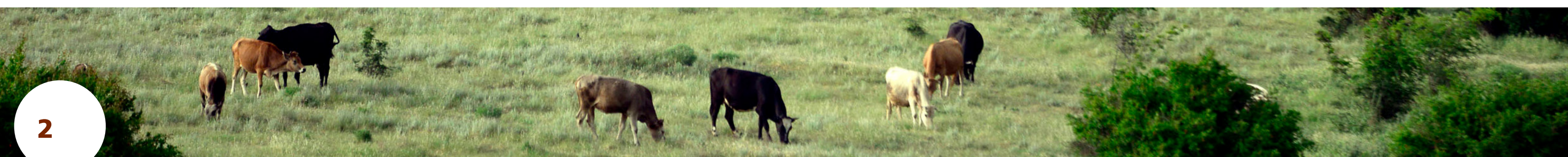


Figure 4. Global meat production by region



1 *This refers to the total volume of meat derived from bovine, pig, poultry, ovine and other animals, in carcass weight equivalents.*

2 *All production and trade values reported in this publication have been derived by combining actual official, non-official and estimates, and therefore, they are subject to revision.*



World total meat exports reached 42.1 million tonnes in 2021, up 0.9 percent from 2020, albeit slower than the average growth rate[3]. The growth slowdown in 2021 reflects significant import curtailment in Asia and Europe, offset by increases in the Americas, Africa and Oceania. Looking at country-specific performance, **China** registered a sharp decline in imports due to growing internal production and low domestic prices, along with some drops in the **United Kingdom, the European Union, Iraq**, and **Canada**. Regarding exports, **Brazil** and the **United States** have increased their market shares in the global meat export market, with Brazil's share rising from 19.2 to 19.9 percent and that of the United States from 20.3 to 20.7 percent. **Uruguay, Türkiye** and **India**, in particular, shipped more meat, partially offset by declines in the **European Union**, the **United Kingdom, Australia** and **Argentina**.

Regarding meat categories, poultry meat exports expanded the most, followed by bovine meat, while ovine meat exports remained largely stable and those of pig meat contracted.

Figure 5. Global meat exports by type

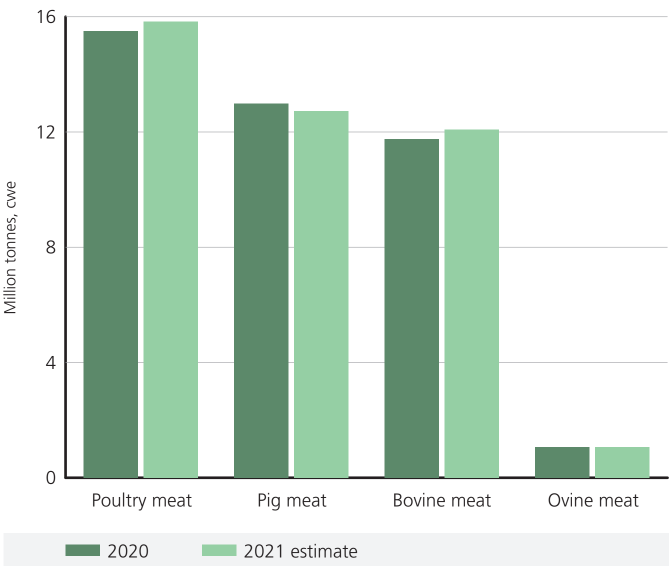
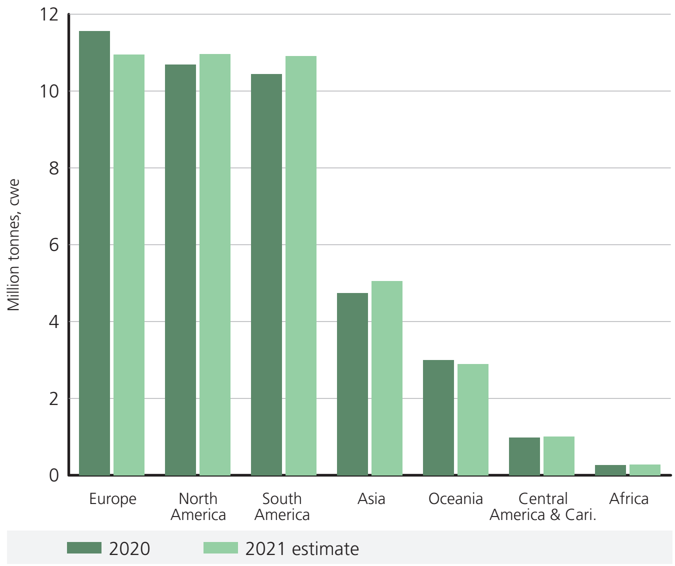


Figure 6. Global meat trade by region



Performance of production and trade across meat sub-categories

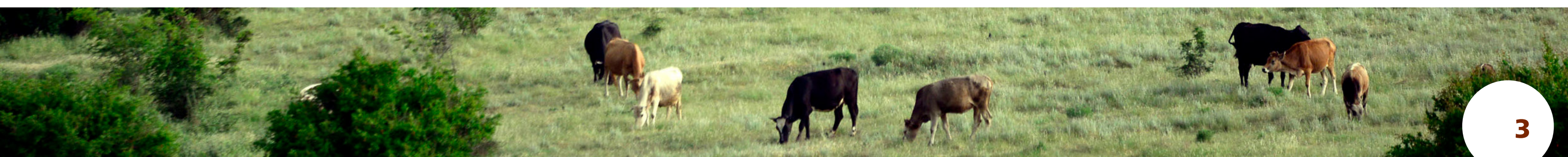
The following sections summarise production and trade performance and the underlying market environment of the bovine, ovine, pig and poultry meat sub-sectors.

Poultry meat

Poultry meat production expanded driven by competitive prices

Global poultry meat production reached 137.8 million tonnes in 2021, up 1.3 percent from 2020. The highest volume expansions occurred in Asia and the Americas, with some gains in Africa and Oceania, whereas Europe registered a decline. At the country level, much of the output expansion originated in **Brazil, Indonesia, China, Myanmar, India, Pakistan** and **Türkiye**. In **Brazil**, HPAI-free status provided advantages in securing foreign markets for poultry meat, which was in high demand due to its competitive prices. High foreign demand, especially from the Middle East, underpinned production expansion in **Türkiye**. Increased investments in the poultry sector, especially in large-scale operations, and the recent pig meat deficit, which also attracted small-scale operators, enabled **China** to expand poultry meat

[3] *Meat trade expanded by 4.5 percent on average between 2016 and 2019. The high growth rate in 2020 reflects the trend growth rate plus the impact of Brexit.*



output. Besides some revival in food services sales, the continued high retail sales contributed to lifting demand for meat products in many countries, which, in turn, provided the required impetus for production expansions, including in **Indonesia, Myanmar, India** and **Pakistan**.

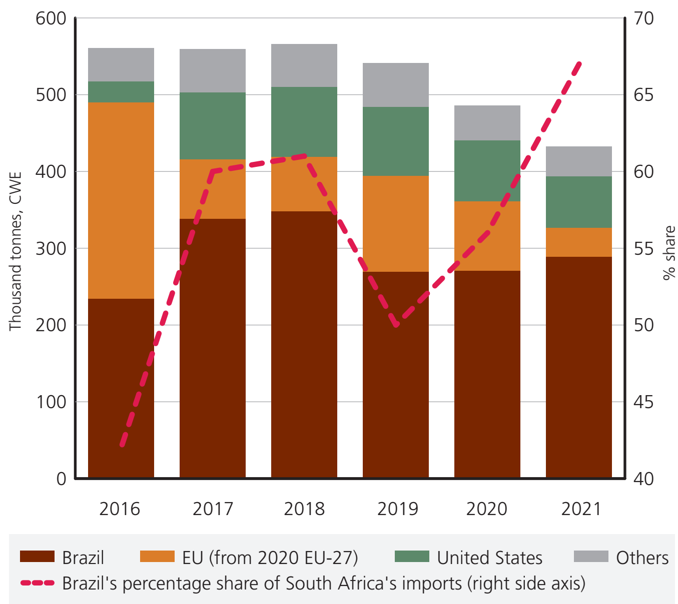
By contrast, the **European Union**, the **Russian Federation**, the **Islamic Republic of Iran** and **Argentina** registered production contractions. In the **European Union** and, to some extent, the **Russian Federation**, internal demand expanded with some revival of food services sales. Still, it was inadequate to lift the output, given other factors, prevalent HPAI outbreaks, escalated input costs, primarily feed (accounting for over 70 percent of the production cost), logistical hurdles and freight costs. Producers in the **Islamic Republic of Iran** and **Argentina**, among others, scaled back production due to squeezed profit margins. In Argentina, the current agricultural protection regime, consisting of input and output export taxes, was inadequate to lift output.

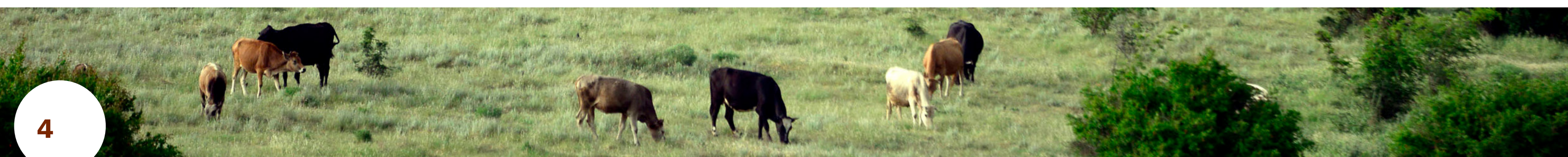
Global trade in poultry meat in 2021 reached 15.8 million tonnes, up 2.2 percent from 2020, with the most significant volume expansions in South America, Asia, North America, along with slight increases in Oceania, Africa and Central America and the Caribbean, but, by contrast, those in Europe contracted.

Regarding country-level performance, the **United Arab Emirates, Mexico, Cuba, Ghana, Japan** and the **Philippines** registered the most significant import increases in 2021. Poultry meat imports expanded in **Mexico**, driven mainly by high internal demand, including the food processing industry. Increased population, growing middle class, and economic resurgence provided additional impetus for imports to rise in **Ghana**. Despite sluggish sales in western-style restaurants, poultry meat imports increased in **Japan** due to high demand from the food processing industry and ready-to-eat poultry products. By contrast, poultry meat imports declined significantly in **China, Iraq**, the **United Kingdom, South Africa, Viet Nam** and the **European Union**, among others. **China** imported less poultry meat as demand and prices weakened with consumers switching to pig meat and its price declining since mid-2021. Consumers in **Viet Nam** also changed back to pig meat as supplies increased, reducing poultry meat imports. In **Iraq**, lower imports reflected the dwindling purchasing power of many households. In **South Africa**, anti-dumping duties on bone-in chicken meat against the Netherlands, Germany and the United Kingdom and disruptions to port operations, including a cyber-attack that disrupted harbour services, led poultry imports to fall.

Brazil, China, Türkiye, the **United States, Ukraine** and **Thailand** supplied much of the increased global demand for imports. **Brazil** reached a new record high volume of exports, benefitting from the Brazilian real depreciation and its HPAI-free status amidst high HPAI outbreaks in key producing regions. **China**'s poultry exports expanded on increased demand for pre-cooked and preserved meat products worldwide, including in **Japan**, the **Netherlands, Malaysia** and the **United Kingdom**. Increased foreign demand sustained poultry meat exports from several countries, including **Türkiye** and the **United States**. **Ukraine** benefitted from market access in the European Union and Middle Eastern countries, while **Thailand**'s exports mainly concentrated on pre-cooked products in the European Union and Japanese markets. By contrast, poultry meat shipments fell from the **European Union** and the **United Kingdom** due to limited import demand, Brexit-related challenges to customs procedures, HPAI-related export restrictions or anti-dumping duties imposed by South Africa.

Figure 7. South Africa poultry meat imports





Bovine meat

Global supplies tightened on lower output from leading exporters

World bovine meat output in 2021 reached 72.5 million tonnes, up slightly (0.7 percent) from 2020, driven by output expansions in Asia, North America and Central American and the Caribbean, mostly offset by declines in South America, Oceania, Europe and Africa.

Concerning country-specific performance, bovine meat output increased in the **United States, India, China, Uruguay, Türkiye** and **Canada**. The output increase was driven by robust demand from Asia and higher carcass weight in the **United States**, while cattle stocks remained largely unchanged. In **India**, production expanded, reflecting the normalisation of the meat slaughter operations, as the Government ensured inter/intra-state movements of animals to slaughterhouses. Increased carcass weight and foreign demand also supported production expansion. In **China**, productivity gains in large-scale livestock operations led to bovine meat output growth. In **Uruguay**, production expanded, reflecting the highest cattle slaughter increased slaughter reached in 16 years, induced by solid overseas demand, high FOB prices, increased cattle supplies, and positive return margins.

By contrast, output contracted in **Brazil, Australia, Argentina**, the **United Kingdom**, and the **European Union** underpinned by the limited availability of cattle for slaughter. Production in the United Kingdom fell from the highs in 2020 due to lower cattle stock, following increased liquidation in 2020. Labour shortages in meat processing also weighed on output contraction. In the **European Union**, the decline followed the falling dairy cattle numbers amid European Union-wide efforts to restructure the dairy sector, intending to improve efficiency and reduce the environmental footprint.

World total bovine meat trade in 2021 rose by 2.8 percent to 12.1 million tonnes, with much of the shipments originating in North America, Asia, Central America and the Caribbean, and those of Europe and Africa remained essentially unchanged but partially offset by contractions in Oceania and South America.

At the country level, the **United States, Uruguay, India, Canada** and **Paraguay** were among those countries that registered the most significant export expansions. The **United States** bovine meat exports rose by 17.5 percent, with five countries (China, Japan, the Republic of Korea, Mexico and Canada) accounting for nearly 90 percent of exports. Buoyed demand, benefitting from the tightened supplies from Brazil, Argentina and Australia, have driven exports from **Uruguay** and **Paraguay** to increase by 35 and 17 percent, respectively, in 2021. Lower internal demand, especially for better quality meat cuts amidst higher domestic prices, allowed Uruguay to export higher quality bovine meat products. Exports from Paraguay increased due to increased production, driven by a record high cattle slaughter induced by dry weather, repeated frost events that damaged pastures and corn production, and high cattle prices.

India's bovine meat exports registered a recovery in 2021, helped by increased production and higher demand from Egypt, Malaysia, and some Middle Eastern markets. Besides, high market diversification helped India withstand lower demand from North-East Asia. **Canada**'s bovine meat exports to the United States continued to expand, with boneless, fresh or chilled making the bulk of exports. Tight export availabilities underpinned export contractions in **Brazil, Australia** and **Argentina**. The decline in Argentina was due to bovine meat export restrictions, starting from an export ban in May, which was later relaxed but continued to apply for select beef cuts.

Bovine meat imports continued to expand in **China**, while others, including **Chile, Egypt, Indonesia**, the **Philippines** and the **Republic of Korea**, registered partial recovery from depressed imports in 2020. By contrast, several countries curtailed bovine meat imports, especially the **Russian Federation, Canada**, the **European Union, Japan** and the **United Kingdom**.

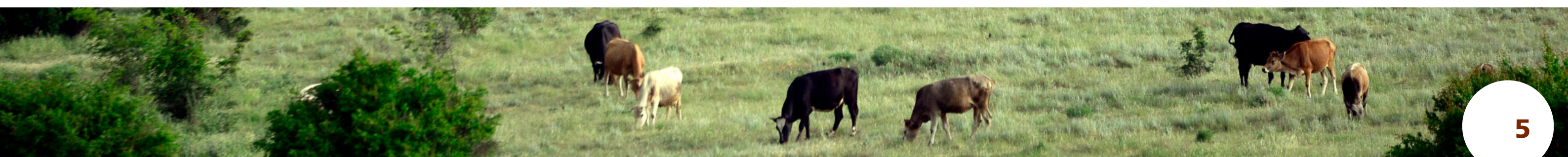
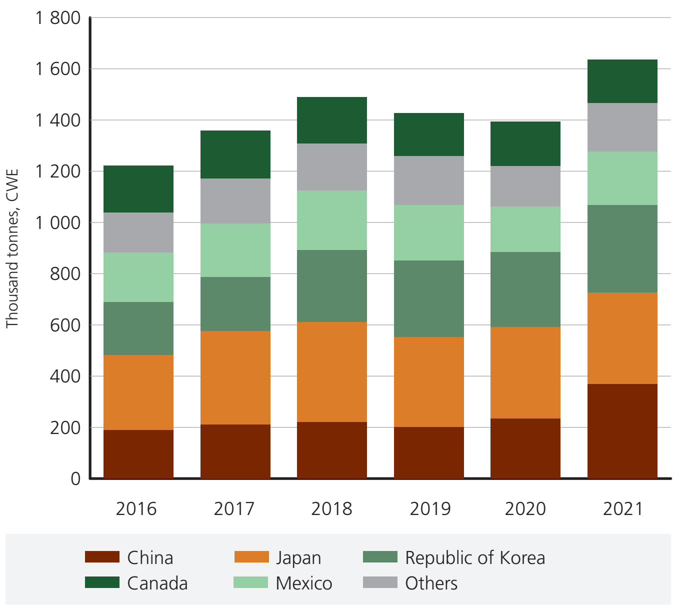


Figure 8. The United States bovine meat exports



Pig meat

Growth in the pig meat trade slowed down due to production recovery in China

Global pig meat output reached 122.5 million tonnes, up 11.5 percent from 2020, driven principally by a sharp output expansion in Asia, some increases in Europe and South America, offset by a significant downturn in North America. The 28 percent increase in **China**'s pig meat output, equivalent to 11.8 million tonnes, to around 54 million tonnes, underpinned the global output expansion, overshadowing some not-so-insignificant gains in **Brazil**, the **European Union, Viet Nam** and the **Russian Federation**.

The sharp increase in output in **China** ended three consecutive contractions since 2018 following the ASF outbreak. Production is only slightly behind the pre-ASF output level with the latest expansion. Increased slaughter in anticipation of price falls from mid-2021 principally underpinned production expansion. **Brazil**'s pig meat output expanded on robust internal and external demand. Following a 2.9 percent fall in 2020, the **European Union** pig meat production rose by 1.7 percent to 23.6 million tonnes, driven by expansions in some member states such as Spain, which remained free from ASF outbreaks. Although ASF outbreaks continued unabated in **Viet Nam**, pig meat output increased slightly since mid-2020. In the **Russian Federation**, output expanded slowly compared to 2020, mainly led by large-scale farms. Still, the growth rate fell as businesses adjusted their production plans to face the ASF epidemic.

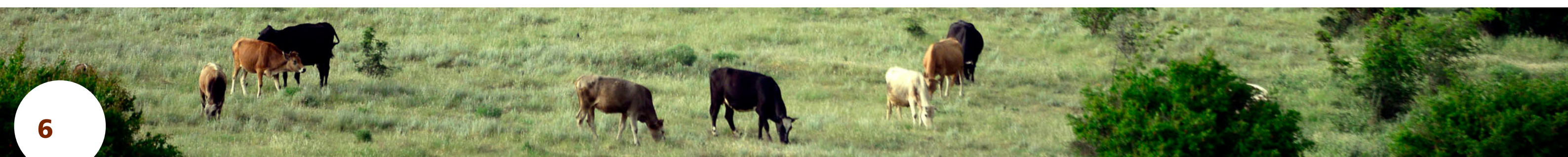
By contrast, pig meat output fell in the **Philippines** and the **United States**. In the **Philippines**, ASF outbreaks continued in regions with widespread pig farming, lowering pig slaughter levels and plunging pig meat production by nearly 21 percent. Pig meat production dropped to 12.6 million tonnes in the **United States**, a 2.2 percent lower compared to 2020, amid the continued decline in hog stocks.

Global pig meat trade stood at 12.7 million tonnes in 2021, down 2.1 percent from 2020, caused by import contractions in Asia and Europe, although imports of all other regions increased.

China registered the sharpest import curtailment at the country level, with some declines in the **United Kingdom**, the **European Union**, and **Canada**. In **China**, domestic availability of pig meat increased, stemming from the faster-than-expected recovery of hog stocks and the decline in domestic pig meat prices, slowing down import demand in the second half of the year. Increased production and moderate to muted growth in the internal market enabled the **United Kingdom**, the **European Union**, and **Canada** to curtail imports.

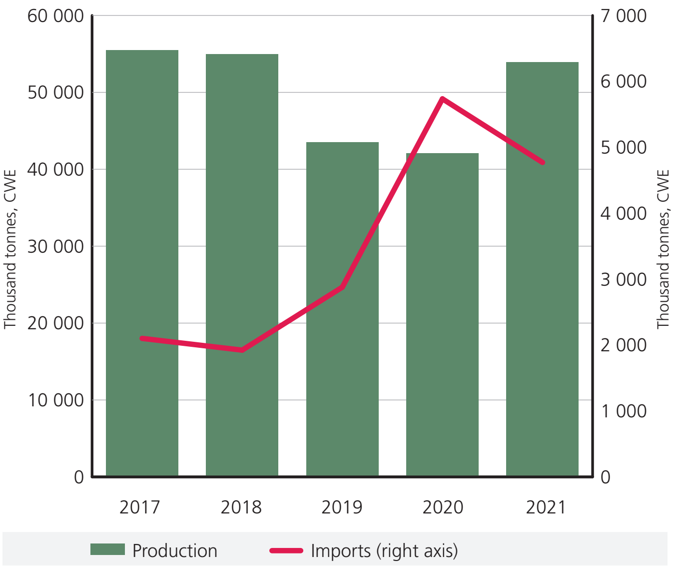
By contrast, the **Philippines, Mexico** and the **United States** increased pig meat imports in 2021. In the Philippines, the Minimum Access Volume allocation and lowering tariff rates helped increase imports. In Mexico, purchases rose due to inadequate production growth to fulfil growing demand from the food processing industry and consumers. The United States imported more pig meat, mainly from Canada, driven by the market tightening due to the decline in domestic pig meat output. **Viet Nam** registered an increase in imports as well, though slightly, reflecting the ASF-induced supply gap.

Concerning exports, several large exporters shipped less pig meat, especially the **European Union**, the **United Kingdom**, the **United States** and **Canada**, as they faced weak demand from their regular buyers, especially China. Besides lower import purchases, pig meat producers in the **European Union** and the **United States** lowered farrowing on increased feed



costs, causing overall supplies to fall. Despite these challenges, the European Union and the United States exported 5.2 million tonnes and 3 million tonnes, respectively. Reflecting the depressed global demand, exports from **Chile, Mexico, Thailand** and **Argentina** also fell.

Figure 9. China pig meat production and imports



Ovine meat

Global ovine meat output expanded, but international trade fell slightly amid tight export supplies

World ovine meat output in 2021 reached 16.4 million tonnes, up 1.8 percent year-on-year, with the highest volume increase originating in Asia and South America but partially offset by reductions in Europe and Oceania. In other regions, production remained largely unchanged.

Regarding country-focused production, **China, Türkiye, Mongolia, Pakistan** and the **European Union** registered increases, offset by declines in the **United Kingdom**, the **Russian Federation** and **New Zealand**. In **China**, the world's largest producer, accounting for 31 percent of world production, output increased to 5.1 million tonnes, up 4.4 percent from 2020, the highest growth rates reached in the last 5 years. The entry of small-scale producers, induced by lower pig meat production and high prices in previous years, supported the uptick. Increased ovine meat prices, combined with tight bovine and pig meat supplies, attracted farmers to raise sheep and goats in countries with supportive geographic and policy environments, including **Türkiye** and **Mongolia**, parts of Europe, and sub-Saharan Africa. The early end to the COVID-19 social distancing requirements helped resume food services sales, accounting for over 65 percent of ovine meat consumption.

In Oceania, high demand for stock rebuilding, following years of elevated slaughter due to drought conditions, led to output contractions in 2021. In **Australia**, production increased marginally, as the national flock expanded, supported by improved weather conditions, after declining by 11.4 percent in 2020. In **New Zealand**, by contrast, ovine meat production fell by 3.8 percent to 444 000 tonnes, reflecting limited availability of animals for slaughter, following high liquidation in 2019-20 amid the drought.

World total exports of ovine meat in 2021 slightly fell (-0.2 percent) from 2020, to 1.1 million tonnes, as many countries reduced imports, with significant declines in the **European Union**, the **United Kingdom, Qatar** and **Malaysia**. In the **European Union**, the reduction in imports resulted from increased production within the block, high prices and limited growth in the food services sector. Logistical and customs difficulties following Brexit also caused imports from the European Union and the **United Kingdom** to fall. Imports by many other countries declined, including **Qatar** and **Malaysia**, due to tight global supplies and increased international prices.

However, imports by **China** and the **United States** rose significantly, driven by increased economic activities, including the revival of food services sales. ASF-related meat supply gap continued to support high volume exports to China. In **Australia** and **New Zealand**, trading operations faced considerable challenges from shipping delays, high freight costs, and COVID-19-related disruptions, especially in the first half of 2021. Despite the obstacles, Oceania supplied over 80 percent of the total global exports.

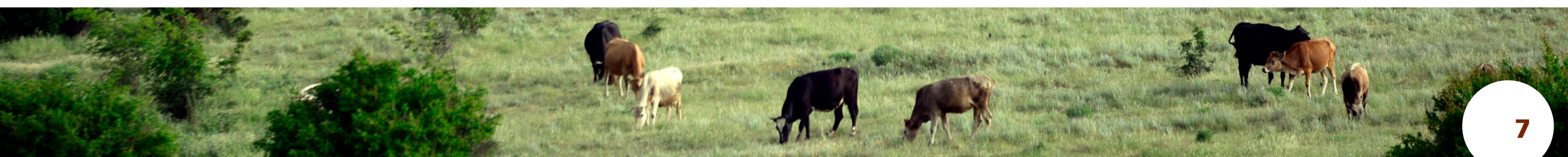
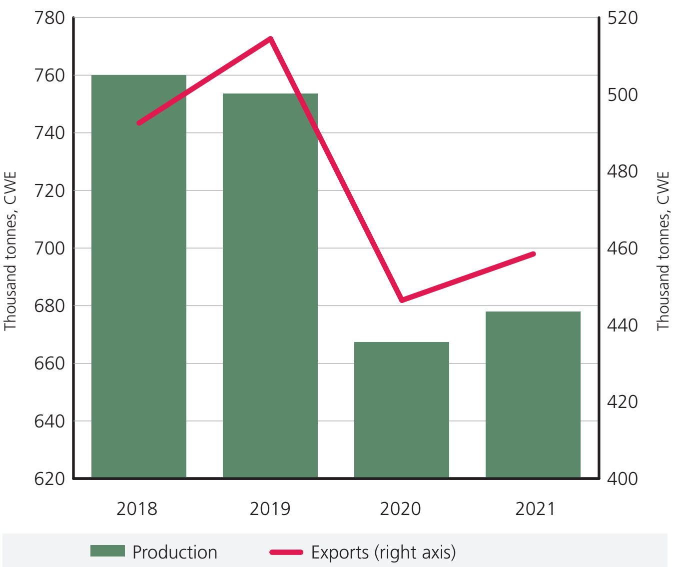


Figure 10. Australia ovine meat production and exports



Policy developments affecting the meat sector

This review covers policy measures related to meat and meat products from 1 January to 31 December 2021[4].

Policy developments affecting meat production, marketing and consumption

COVID-19-related production and income support policies

Several governments implemented policy measures to support the meat sector, enabling them to cope with disruptions across the meat value chains caused by COVID-19-related social distancing requirements and lockdowns.

- **Canada**, in April 2021, approved the federal budget in more than two years, affirming commitments to safeguard the sectors impacted by the COVID-19 and build a resilient, equitable economy. Approximately USD 5.2 billion were allocated for agriculture, including direct investment and programming-related expenditure in the agriculture, forestry and fisheries sectors and extended support for temporary foreign workers in meeting mandatory quarantine requirements upon arrival.

- The **European Union**, in January 2021, extended until 31 December 2021 the State Aid Temporary Framework (SATF) adopted in March 2020 to support the economy in the context of the COVID-19 pandemic. The European Commission also expanded the scope of the SATF by increasing the ceilings for specific support measures and allowing the conversion of some repayable instruments into direct grants until the end of 2022. This way, European Union member states can use the flexibility of state aid rules to support their economies while limiting distortions to competition.

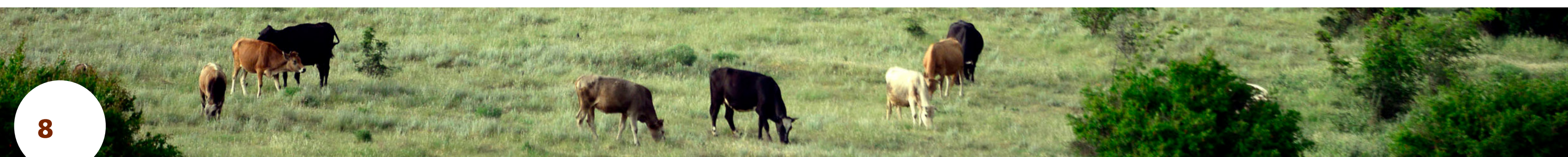
- The **United States**, in March 2021, launched the Coronavirus Food Assistance Program (CFAP-2), which covered the meat sector among those selected to receive assistance. Under the programme, the Government offered compensation to cover losses due to sudden losses that arose from lower prices at pre-established rates per cattle according to the number of livestock held by farmers on a date selected by the producer from 16 April 2020 through 31 August 2020. The American Rescue Plan Act of 2021, also called the COVID-19 Stimulus Package, launched in March 2021, with a total budget of USD 1.9 trillion, including USD 10.4 billion allocated for agriculture, covering debt forgiveness, purchasing and distributing agricultural products, including meat.

Other production and income support policies

Several governments implemented policy measures supporting farmers and processors to cope with droughts or loss of markets due to trade agreements.

- **Argentina**, in June 2021, announced a new Livestock Plan (Plan Ganadero), allocating USD 100 million. The plan aimed to increase the sector's productivity to boost cattle and bovine

[4] *This report reviews the key policies governments introduced in 2021, including those contained in the August 2021 issue of the Meat Market Review, to offer a complete picture of the policy landscape that affected the meat sector.*



meat production by providing technical and financial assistance for the entire production chain, including financing at subsidised rates, granting tax benefits and training in technological improvements and help in technical development. In July 2021, Argentina also announced ARS 2 billion (USD 21 million) to finance productive investments in the poultry sector. It aims to increase national production by investing in the whole production value chain, including manufacturing capital goods, thus enhancing poultry meat exports and generating foreign exchange. Financing under the programme can be accessed through different mechanisms, depending on the nature of the business. The loan interest rates were set at 22 to 24 percent, below the annual inflation rate.

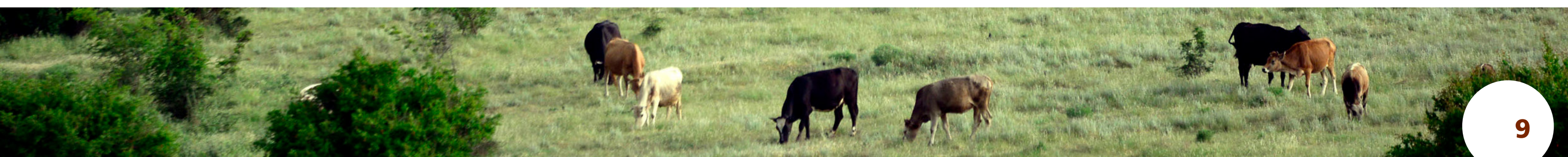
- **Canada**, in May 2021, launched the Poultry and Egg on-Farm Investment Program (PEFIP), allocating CAD 691 million (USD 529 million) over 10 years to drive innovation and growth of the poultry and egg sector through on-farm investments. Each farm is entitled to an amount proportional to its quota holding as of 1 January 2021 under Canada's supply-managed production. Eligible projects included those targeting improvements to production efficiency, responding to consumer preferences, and improving on-farm safety, biosecurity, or environmental sustainability. Eligible projects may consist of new barn construction; upgrades to equipment such as feeding, watering, lighting, ventilation, heating, and comfort systems, leading to energy efficiency and reducing the environmental footprint. Canada also allocated USD 230 million, committing funds through 2029 to compensate for ceding market access commitments to poultry, eggs and dairy processors under the Comprehensive Economic and Trade Agreement with the European Union and the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP). In August 2021, Canada increased funding for the AgriRecovery Framework to CAD 500 million (around USD 400 million) to cover additional costs farmers had to pay due to droughts and wildfires. This includes initial funding of CAD 100 million (around USD 80 million), announced on 6 August 2021. The funding covers direct assistance to livestock and agricultural producers to cover additional costs of obtaining livestock feed, transport and water.

- **China (mainland)**, in April 2021, announced a regionalisation strategy, which involves splitting the country into five regions and giving greater responsibility to regions to prevent and control animal disease spreads, including ASF. With the plan's implementation, China suspended moving pigs between regions other than piglets and pigs for breeding purposes.

- **Cuba**, in April 2021, announced the cancellation of a ban introduced in 1963 on cattle slaughter and sale of bovine meat and dairy products without state permission as part of agricultural reforms. Under the new arrangement, farmers are allowed to do as they wish with their livestock once the state quotas are met and the conditions that this will not reduce the cattle herd.

- The **Dominican Republic**, in October 2021, launched a project worth DOP 72 million (around USD 1.3 million) to provide technical assistance and financing to small pig producers affected by ASF. The plan promotes restocking other species of animals to provide a livelihood for producers until the authorities certify that restocking pigs is safe. Many countries implemented precautionary measures after the detection of ASF in the Dominican Republic at the end of July 2021, including increased inspections by Colombia and banning pig meat imports by Mexico and Taiwan province of China.

- The **European Union**, in June 2021, accepted the provisional deal agreed with the European Parliament on the key elements of the Common Agricultural Policy (CAP) reform, covering the period 2023–2027. The new policy emphasises the social dimension of agriculture, including adequate employment conditions for workers, the adoption of 'greener farming practices,' support for smaller farms, and performance-based CAP that allows member states freedom to implement tailor-made interventions based on strategic planning. In December 2021, the European Union adopted the CAP agreement, which will begin in 2023.



- **Türkiye**, in May 2021, announced that the Turkish Grain Board would provide corn and barley for livestock producers at subsidised prices to offset the increase in feed prices and the decline in profit margins for meat and milk producers.

- **Ukraine**, in July 2021, announced the reinstatement of the value added tax (VAT) rate from 14 percent to 20 percent for imports into the territory for certain types of agricultural products, including live animals. The aim is to reduce the risks from higher food prices and create equal conditions for agricultural producers and the processing industry.

- The **United Kingdom**, in October 2021, announced that it would fund a private storage aid scheme to enable meat processors to store slaughtered pigs for between three and six months to allow them to be preserved and processed at a later date. The plan also includes measures to allow up to 800 pig butchers to apply for work visas for up to 6 months. As a further measure, the two meat levy bodies, the Agriculture and Horticulture Development Board and Quality Meat Scotland, announced payment holidays for levy payers in the pig sector for November 2021.

Consumer-oriented policies

- **China (mainland)**, in June 2021, launched a price monitoring system to mitigate against fluctuations in domestic pig meat prices through the National Development and Reform Commission (NDRC). On 7 July 2021, the NDRC announced its intent to purchase frozen pig meat from the market, representing the second stage of NDRC's price control mechanism, setting a floor price for pig meat.

- **Malaysia**, in December 2021, relaxed rules on importing chicken and a temporary ceiling on retail prices to stabilise prices. The Government allowed the import of whole chickens from abroad, relaxing the policy of not allowing imports of chicken cuts.

- **Viet Nam**, in February 2021, announced the National Standard for Chilled Meat, Part 3 (poultry meat). The objective of the standard is to help improve food safety and hygiene management, advance transparency in product labelling, provide a legal framework for businesses producing and trading in these products, and ensure that consumers have access to safe chilled meat.

Policy developments affecting international trade

Tariff and tariff rate quotas

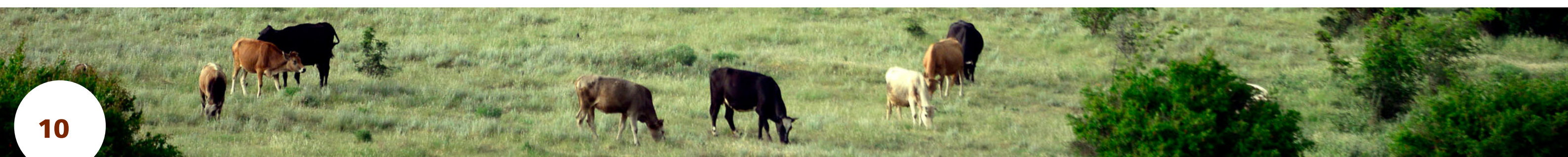
- **Ecuador**, in July 2021, issued a resolution lowering tariffs on 667 products, including 43 agricultural products, which became effective on 1 October 2021. The products with lowered tariffs include live bovine animals and their products, ranging from 5 to 20 percent.

- **Ethiopia**, in August 2021, raised tariffs on meat and edible offal from 30 percent to 35 percent, as part of an effort to increase the competitiveness of domestic producers by imposing higher tariffs on locally produced products and lower tariffs on raw materials. The Government introduced the new policy while releasing a revised edition of the customs tariff book, covering more than 8 000 tariff line items.

- **Japan**, in March 2021, announced that imports of United States bovine meat surpassed the annual safeguard trigger volume established under the United States-Japan Trade Agreement. As a result, tariffs on United States bovine meat increased from 25.8 percent to 38.5 percent for 30 days. beginning 18 March 2021. Meanwhile, the agreement entered its third year of implementation on 1 April 2021, reducing applicable tariffs further. The agreement expects to eliminate tariff rates for selected meat products on a staggered basis starting from 2021.

- **Kazakhstan**, in December 2021, announced the first stage of 2022 meat quotas, which included 2 835 tonnes of bovine meat and 31 500 tonnes of poultry meat. The 2022 volumes and rates remained unchanged from those announced in 2021.

- **Mexico**, in June 2021, introduced a new tariff-free quota for meat suppliers from outside North



America. The total quota was set at 30 000 tonnes of poultry meat (previously introduced on 23 June 2021), 7 000 tonnes of bovine meat and 10 000 tonnes of pig meat, available until 31 December 2021.

- The **Philippines**, in May 2021, increased the yearly tariff rate quota from 54 210 to 254 210 metric tonnes and lowered tariff rates on imported fresh, chilled, and frozen pig meat. In June 2021, the Government announced guidelines for the Minimum Access Volume (MAV) or tariff-rate quota for pig meat, specifying the allocation method of the additional volume of 200 000 metric tonnes (MT), authorised via Executive Order No. 133. Accordingly, up to 70 percent of the additional MAV (i.e., 140 000 MT) was available from July to October 2021, with the remaining 30 percent (60 000 MT) eligible from November 2021 through January 2022. MAV import clearances are allocated on a first-come, first-served basis.

- **South Africa**, in August 2021, renewed anti-dumping duties on bone-in chicken imports from Germany, the Netherlands and the United Kingdom for additional five years. Duties were confirmed as first imposed in 2015 at 73.33, 22.81 and 30.09 percent, respectively. Earlier this year, the South African poultry association applied anti-dumping duties on imported poultry meat from five countries, including Brazil and four European Union member countries, namely Denmark, Ireland, Poland and Spain, with the outcome expected during the first quarter of 2022 after the conclusion of an investigation process.

- The **United States**, in March 2021, suspended retaliatory duties for four months from 4 March 2021 on British pig meat. The United States initially imposed the duties over the aircraft subsidies dispute with the European Union but suspended aiming to resolve the dispute.

- **Viet Nam**, in November 2021, issued a decree revising its MFN (most favoured nation) tariff rates, including frozen pig meat. Under the revision, MFN rates for frozen pig meat imports will decrease from 15 to 10 percent as from 1 July 2022.

Diseases-related protocol agreements and import restrictions

Many governments worldwide imposed import restrictions or bans to prevent the transboundary spread of animal diseases and the COVID-19 virus or entered into agreements with trading partners to protect export/import businesses from possible animal disease outbreaks.

African swine fever

'Regionalisation' or 'zoning' agreements gained popularity, allowing pig meat imports to continue from regions officially recognised as ASF-free even when some areas within the country have reported outbreaks.

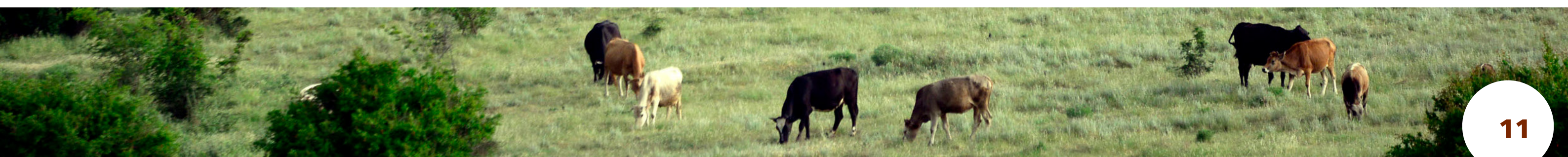
- **Canada**, in March 2021, signed a protocol with the United States to guide bilateral trade in the event of detecting ASF in its wild pigs, without cases in farm swine stocks. In the event of detecting the ASF virus in wild pigs, the two countries agreed to immediately stop trading live swine, swine germplasm and untreated swine products while allowing trade to continue in products treated to make the ASF virus ineffective.

- **China (mainland)**, in December 2021, recognised zoning for France in the event of ASF outbreaks.

- **Japan**, in January 2021, reopened its market to Hungarian pig meat for the first time since April 2018, following the implementation of a new ASF regionalisation protocol. Japan, in September 2021, also lifted a ban on pig meat imports from Belgium and Czechia while removing age-based restrictions on imports of Danish bovine meat.

- **Kazakhstan**, in February 2021, lifted a ban on pig meat imports from several regions in the Russian Federation, first imposed in December 2020 over ASF concerns.

- The **Republic of Korea**, in October 2021, lifted a ban on pig meat imports from Belgium, which had existed since September 2018 due to an ASF outbreak, as Belgium was officially declared disease-free from ASF by the OIE on 21 December 2020.



- **Singapore**, in March 2021, signed a regionalisation agreement with Germany, allowing pig meat imports from ASF-free regions in Germany.

- **Viet Nam**, in March 2021, entered a regionalisation agreement with Germany, allowing pig meat imports from ASF-free regions in Germany. Similarly, in October 2021, Viet Nam agreed to a zoning arrangement with Canada to allow safe trade from Canada in the event of an ASF outbreak. However, in June 2021, suspended live pig imports from Thailand after ASF was detected in a batch of imported hogs in May 2021.

Bovine spongiform encephalopathy (BSE), foot-and-mouth disease (FMD) and lumpy skin disease

Import restrictions due to BSE, FMD or lumpy skin diseases continued to affect the bovine meat trade during the reference period.

- **China (mainland)**, in July 2021, banned the import of cattle and cattle products from Lao People's Democratic Republic to prevent the spread of lumpy skin disease, first detected in April 2021. In September 2021, China banned bovine meat imports from the United Kingdom of cattle under 30 months of age after a case of BSE. China lifted the ban only in 2018 after more than two decades of existence due to an earlier case of BSE.

- **Mexico**, in July 2021, signed an animal health protocol with Belize to guarantee cattle market access to Mexico, which requires live cattle to be free from identified diseases and attestation of no contact with wild animal species known to be reservoirs for the diseases. Mexico had signed similar protocols with Nicaragua and Guatemala, establishing disease-free regional certifications.

- The **Philippines**, in October 2021, imposed a temporary ban on bovine meat from the United Kingdom over BSE concerns. The ban applies to cattle slaughtered after 31 August 2021.

- **South Africa**, in May 2021, confirmed an outbreak of the FMD disease in cattle in KwaZulu-Natal Province. The Government negotiated agreements with trading partners to continue to trade in safe commodities, including heat-treated meat and dairy products, deboned and matured bovine meat and other derived products. However, Botswana and Eswatini announced trade restrictions.

- **Uganda**, in April 2021, banned the sale and movement of livestock and their products in the Kiruhura district to stop the FMD spread.

Highly pathogenic avian influenza (HPAI)

Several countries announced HPAI-related import restrictions during the reference period.

- **Azerbaijan**, in February 2021, suspended imports of all types of live birds and poultry products from some regions of the Czechia, Germany and the United Kingdom.

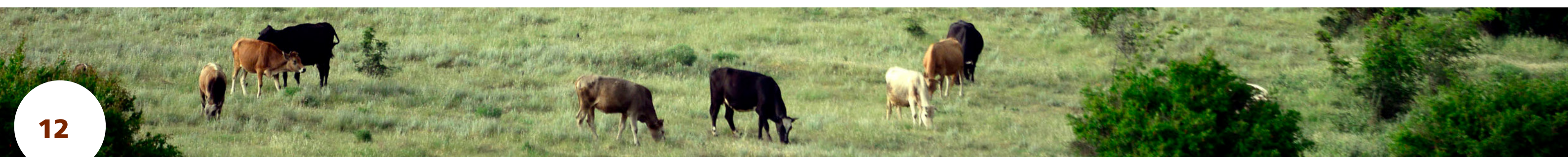
- **Belarus**, in January 2021, restricted imports of live birds and poultry products from some regions of Sweden and Hungary.

- **Botswana**, in June 2021, banned imports of live poultry and poultry products from South Africa after outbreaks of HPAI virus in several provinces. In addition to the ban, the Government also cancelled all related import permits, except for transporting fresh poultry products from other countries moving through South Africa.

- **China (mainland)**, in April 2021, suspended imports from the Republic of Korea (one region) and Sweden (one county); and in May 2021 from the Netherlands and Poland.

- **China, Hong Kong SAR**, in October 2021, suspended poultry imports from the Russian Federation due to the detection of an HPAI outbreak. Similar bans have been in effect since May 2021 from some regions in Germany, Lithuania, the Netherlands, Poland, South Africa and Viet Nam for the same reason.

- **Mozambique**, in April 2021, banned importing live birds (domestic and wild), bird meat, feathers and eggs from South Africa. The ban covered



all poultry products used in animal feed or for agricultural or industrial purposes.

- **Namibia**, in May 2021, banned imports of poultry and poultry products from South Africa.

- The **Philippines**, in March 2021, halted imports of Russian poultry meat. The Philippines also suspended poultry meat imports from the Czechia in mid-February 2021.

- The **Russian Federation**, in January 2021, imposed import restrictions and banned the transit of live poultry through its territory between January and March 2021 from several European countries.

- **Saudi Arabia**, in June 2021, suspended poultry meat imports from three French provinces due to an HPAI outbreak after a ban imposed two days before on Ukraine's largest poultry meat export facility for the same reason.

Several countries lifted HPAI-related import restrictions under zoning arrangements during the reference period.

- The **European Union**, in March 2021, resumed imports of Ukrainian poultry meat, accepting the measures taken to control the spread of HPAI in the areas affected in December 2020.

- **Ghana**, in April 2021, lifted a ban on imports of poultry meat from the Russian Federation, imposed earlier due to an HPAI outbreak.

- **Japan**, in August 2021, lifted the ban on poultry and egg imports from Ukraine, which was imposed in December last year due to the spread of the HPAI outbreak in that country.

- **Kuwait**, in January 2021, lifted the ban on Russian poultry meat imports imposed in September 2020 due to HPAI concerns.

- The **Philippines**, in August 2021, resumed poultry meat imports from the Netherlands, which was imposed in January 2021 following HPAI outbreaks. A similar ban on poultry meat from Ukraine was lifted on 23 August 2021.

- **Poland** reported 202 cases of HPAI outbreaks between 1 January and 19 April 2021, leading to import bans in several countries. However, these import restrictions were lifted by several countries, as the country declared freedom from HPAI in August 2020.

- The **Republic of Korea**, in August 2021, lifted a temporary prohibition on imports of chicken meat and pet birds (birds other than poultry) from the Philippines. The ban was imposed in March 2020 due to an HPAI outbreak.

- The **Russian Federation**, in March 2021, lifted a ban on hatching eggs and day-old chicks from 21 companies in the Netherlands, accepting the measures to control HPAI spread.

- The **United Arab Emirates**, in December 2021, lifted a ban on imports of eggs and other poultry products from India. The ban was implemented five years ago due to concerns over HPAI.

- The **United States**, in October 2021, authorised poultry meat imports from Poland following a series of audits to ensure that the country's poultry inspection system matches US requirements.

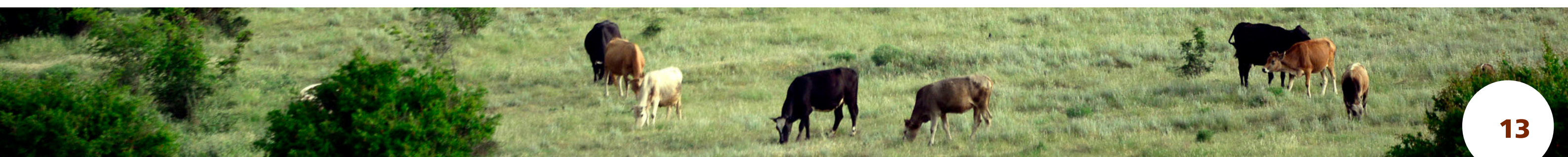
Safety standard-related meat import licenses and restrictions

Several countries issued import licenses based on agreed food safety standards or protocols, accepting specific processing methods or relaxing certain chemical compounds.

- **Argentina**, in June 2021, announced the resumption of poultry meat shipments to the European Union. Argentine National Service of Agri-Food Health and Quality had voluntarily halted shipments on 13 March 2021 following an EU audit.

- **Brazil**, in August 2021, accepted the new Export Certificate model for importing bovine meat and offal from the United States.

- **Canada**, in May 2021, obtained negligible-country risk status for BSE from the World Organisation for Animal Health (OIE), as no BSE cases have



been reported since 2015. This will help Canada in exploring new market access opportunities for bovine meat.

- **Cambodia**, in February 2021, opened the market for importing fresh and processed pig meat from Brazil with the same standards as its internal market.

- **China (mainland)**, in May 2021, approved imports of meat from 31 new US establishments. On 7 April, China had already permitted imports from 19 other US meat processing plants. More than 100 establishments from over 20 countries, including Australia, Argentina, the European Union and the United States, had to halt shipments to China under this rule. However, some have since regained market access. China, in December 2021, resumed bovine meat imports from Brazil and Namibia. In the case of Brazil, shipments were halted on 4 September 2021 after confirming two cases of 'atypical' BSE. China imposed the import ban on Namibia at the end of September due to several instances of contagious bovine pleuropneumonia.

- **Egypt**, in July 2021, issued a decree extending the shelf-life requirements for frozen fish and beef liver until December 2021.

- **India**, in September 2021, published a notification clarifying the date of the bill of lading and the arrival of the consignment to Indian ports. The clarification refers to notification No. 25/2015-2020, authorising the import of consignment of soybean meal and soy cake derived from genetically engineered soybeans. The importation of soybean meal and cakes is required, given that India's soybean production in 2021/2022 is estimated to be lower than its earlier assessment due to a negative impact from the uneven rainfall distribution this year. This measure aims to ensure adequate feed supplies for the poultry, livestock, dairy and aquaculture sectors.

- **Japan**, in March 2021, allowed imports of minced meat and meat preparations from Ireland.

- The **Russian Federation**, in September 2021, signed a protocol with China on terms for checks, quarantine and requirements for veterinary certificates to allow the access of Russian bovine meat to the Chinese market.

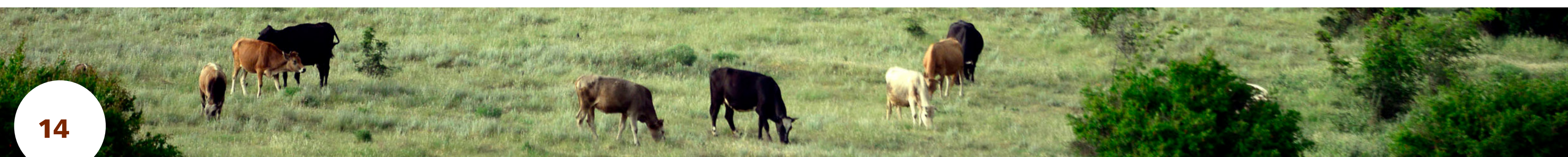
- **Saudi Arabia**, in February 2021, extended the acceptance period of shelf-life from 70 to 120 days for United States bovine meat products, providing the flexibility to purchase larger quantities for Saudi importers. However, in August 2021, the Government suspended implementation of the measure introduced in May 2021 that reduced the shelf-life of frozen chicken from one year to three months, as Brazil perceived this measure as trade protectionism and successfully appealed, together with other exporting nations, based on Codex Alimentarius and other internationally established norms.

- **Türkiye**, in March 2021, issued a directive allowing imports of fattening cattle from April 2021 from countries and those complying with the health and technical criteria determined by the Government.

- The **United Arab Emirates**, in April 2021, authorised pig meat imports from Argentina for consumption by the large expatriate community.

- The **United States**, in December 2021, published updated import regulations on ovine meat purchases. This rule removes remaining BSE import restrictions on sheep, goats and their products and aligns the rules with the current scientific understanding of BSE.

- **Viet Nam**, in November 2021, Issued Decision No. 205, providing guidelines for small and medium swine farms and households on the biosecurity farming process to prevent ASF outbreaks.



Market access

Several countries introduced meat import bans or restrictions during the reference period, citing several factors, including the need to protect domestic producers, violations of food safety standards and chemical traces and prohibited growth hormones found in imported meat consignments. Meanwhile, several countries opened their markets to foreign meat products.

- **Algeria**, in January 2021, suspended red meat imports to rationalise imports and encourage domestic production.

- **China (mainland)**, in November 2021, suspended imports of bovine meat and other products from Lithuania on lack of documentation. China (mainland), in September 2021, authorised meat imports from 17 new meat processing plants in the United States, boosting bovine meat exports to China due to the current ban on Brazil's bovine meat exports over BSE concerns and supply constraints from Argentina and Australia.

- **Kenya**, in December 2021, lifted a ban on Ugandan poultry products, including chicken and eggs.

- **Mexico**, in September 2021, opened its market to pig meat from the United Kingdom for the first time.

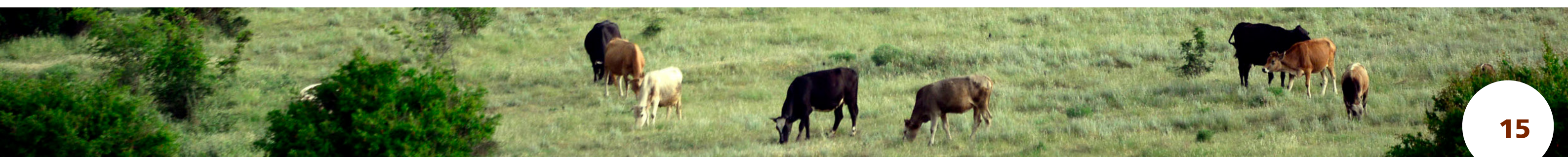
- The **Russian Federation**, in September 2021, extended the foodstuffs embargo, including meat and meat products, until December 2022. The ban was initially imposed in August 2014 on products from Australia, Canada, the European Union, Norway and the United States. As of 13 August 2015, Albania, Iceland, Liechtenstein and Montenegro have been included in the list of these countries, as well as Ukraine from 11 January 2016. In December 2020, the Russian Federation extended the food embargo to the United Kingdom. The Russian Federation, in October 2021, approved imports from three major Brazilian meat exporters and in November 2021, granted approval for bovine and pig meat imports from 12 Brazilian facilities.

- **Saudi Arabia**, in May 2021, banned poultry meat imports from 11 Brazilian meat plants without offering a reason for imposing the restriction.

Export restrictions

- **Argentina**, in January 2021, established reference prices applicable to bovine meat cuts exported to several Asian destinations, including the Republic of Korea, China, the Philippines, Japan and Thailand. The General Customs Directorate established the policy, utilising the 'witness prices' of the Federal Administration of Public Revenues, aiming to detect under-invoicing in exports. In March 2021, the Government extended the reference prices for specific pig meat cuts exported to the same Asian destinations. In March 2021, Argentina suspended 15 meat exporters for violating industry regulations related to competition law and tax evasion. In May 2021, Argentina imposed a 30-day ban on beef exports, aiming to lower domestic prices by temporarily increasing the domestic supply. The resolution exempted exports to overseas markets where Argentina has quotas. In June 2021, the Government lifted the beef export ban but introduced a cap on monthly beef exports at half the average volume exported in 2020, valid until December 2021. Again, in September 2021, the Government announced lifting the cap on bovine meat exports at 50 percent of normal volumes imposed under the national Decree 408/2021 on 22 June 2021. This removal of the cap allowed exporters to begin bovine meat shipments from older cows typically used for manufactured bovine meat. However, the existing restrictions on exports of higher quality cuts remained in place. In December 2021, the Government extended the suspension on exports of some bovine meat cuts until the end of 2023 and removed restrictions on exports of meat from older cows, commonly used for processing bovine meat exported to China.

- **Brazil**, in September 2021, suspended bovine meat exports to China following two cases of 'atypical' BSE found in two domestic meat plants. For the same reason, Egypt, Indonesia and the Islamic Republic of Iran banned bovine meat imports from Brazil. The Philippines and Saudi Arabia removed import bans quickly, as the risk was considered negligible. The Russian Federation imposed bans



on meat processing units in two affected Brazilian states: Mato Grasso and Minas Gerais.

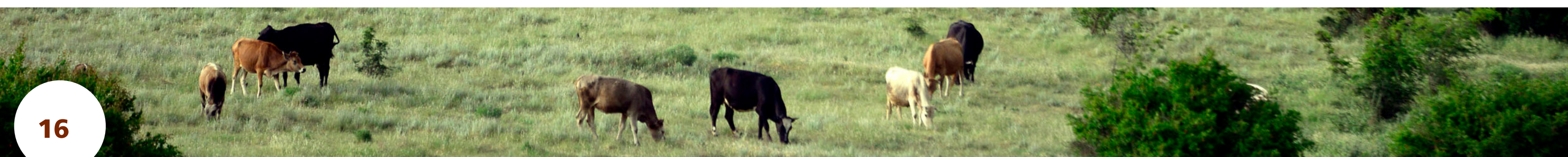
- **New Zealand**, in April 2021, halted exports of livestock by sea following a transition period of two years, citing animal welfare concerns, in a move that is likely to impact main trading partners, including Australia and China.

- The **Plurinational State of Bolivia**, in April 2021, suspended bovine meat exports temporarily to guarantee domestic supply and prevent prices from rising.

Trade agreements

- The **United Kingdom**, in June 2021, agreed to allow tariff-free imports of all Australian agrifood products within 15 years. Under the proposal, tariffs will be eliminated as the deal comes into force. Still, tariff rate quotas and safeguard volumes will continue to apply for periods ranging between 5 and 15 years for the most sensitive products, notably bovine and sheep meats, sugar and cheese.

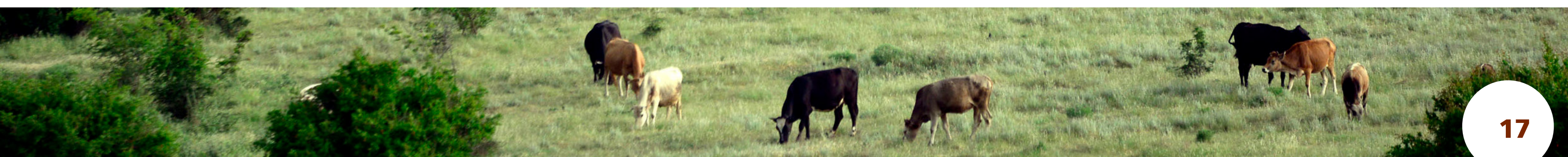
  In December 2021, the Government signed an agreement with Australia for tariff rate quotas (TRQs) on importing bovine and ovine meat over a transition period. TRQs were set at 35 000 tonnes for bovine and 25 000 tonnes for ovine meat, increasing at regular annual increments over ten years to reach 110 000 tonnes for bovine meat and 75 000 tonnes for ovine meat. Any product exceeding this quantity will be subject to the United Kingdom's MFN (most favoured nation) tariffs. From years 10 to 15, there will be product-specific safeguards, which in effect increase the tariff-free bovine imports incrementally to 170 000 tonnes and ovine meat to 125 000 tonnes by year 15, with a 20 percent tariff on any imports that exceed this quantity.



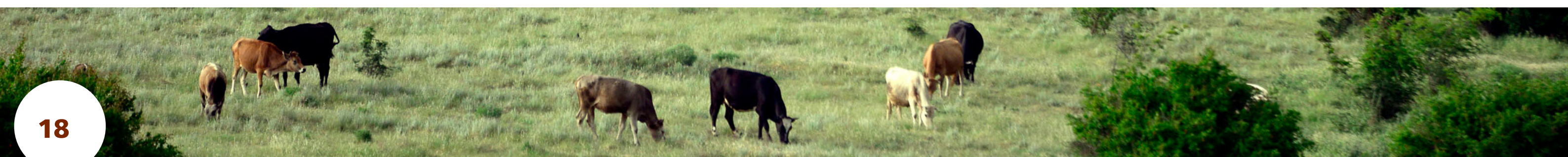
Appendix tables statistics

Total meat statistics	Production		Imports		Exports		Utilization	
	2020	2021	2020	2021	2020	2021	2020	2021
		estim.		*estim.*		*estim.*		*estim.*
ASIA	**137 485**	**151 422**	**23 003**	**22 555**	**4 743**	**5 058**	**155 769**	**168 922**
China	79 318	91 818	11 716	10 512	764	871	90 270	101 459
India	7 197	7 628	1	2	1 239	1 350	5 959	6 279
Indonesia	4 555	4 792	218	274	5	6	4 768	5 060
Iran (Islamic Republic of)	3 111	3 086	81	100	81	41	3 111	3 145
Japan	4 138	4 175	3 516	3 571	21	21	7 655	7 740
Malaysia	1 867	1 874	330	356	65	81	2 132	2 149
Pakistan	4 737	4 985	1	1	84	78	4 654	4 908
Philippines	3 147	2 786	579	935	6	9	3 719	3 712
Republic of Korea	2 743	2 735	1 336	1 399	69	61	4 025	4 093
Saudi Arabia	1 189	1 199	852	854	50	61	1 991	1 992
Thailand	2 871	2 854	38	39	1 366	1 372	1 532	1 487
Türkiye	3 989	4 258	54	46	617	729	3 425	3 576
Viet Nam	5 575	5 786	688	657	32	23	6 231	6 420
AFRICA	**20 066**	**20 177**	**2 767**	**3 136**	**263**	**280**	**22 569**	**23 033**
Algeria	799	798	43	10	1	1	841	807
Angola	332	339	303	367	-	-	636	706
Egypt	2 197	2 234	265	353	5	2	2 457	2 585
Nigeria	1 450	1 432	6	10	-	-	1 456	1 442
South Africa	3 447	3 503	514	474	146	145	3 815	3 832
CENTRAL AMERICA & THE CARIBBEAN	**10 514**	**10 748**	**3 375**	**3 909**	**984**	**1 002**	**12 905**	**13 654**
Cuba	223	220	271	369	-	-	495	588
Mexico	7 537	7 716	2 174	2 493	708	714	9 003	9 495
SOUTH AMERICA	**45 919**	**46 719**	**1 192**	**1 634**	**10 444**	**10 909**	**36 665**	**37 444**
Argentina	6 277	6 106	46	69	1 099	1 003	5 223	5 171
Brazil	29 126	29 657	58	71	7 991	8 353	21 193	21 375
Chile	1 589	1 575	594	821	510	472	1 673	1 925
Colombia	2 820	2 938	202	268	42	69	2 980	3 138
Uruguay	594	751	106	105	413	559	287	296
NORTHERN AMERICA	**53 867**	**54 160**	**3 065**	**3 227**	**10 691**	**10 962**	**46 342**	**46 487**
Canada	5 145	5 325	815	772	2 244	2 272	3 722	3 799
United States of America	48 722	48 835	2 250	2 456	8 447	8 690	42 621	42 689
EUROPE	**65 840**	**65 812**	**5 426**	**5 167**	**11 568**	**10 954**	**59 693**	**60 029**
Belarus	1 285	1 255	63	91	458	484	890	862
European Union	44 917	44 948	1 478	1 321	8 844	8 356	37 551	37 912
Russian Federation	11 222	11 233	660	623	587	647	11 289	11 215
Ukraine	2 487	2 455	161	195	473	511	2 174	2 140
United Kingdom of Great Britain and Northern Ireland	4 198	4 163	2 539	2 349	1 106	852	5 632	5 660
OCEANIA	**6 562**	**6 440**	**463**	**509**	**2 994**	**2 890**	**4 030**	**4 058**
Australia	4 515	4 379	224	239	1 941	1 797	2 798	2 821
New Zealand	1 481	1 497	75	91	1 050	1 090	506	498
WORLD	**340 253**	**355 478**	**39 290**	**40 137**	**41 687**	**42 054**	**337 974**	**353 628**
LIFDC	13 844	13 848	1 699	1 984	213	236	15 330	15 596
LDC	13 810	14 106	1 420	1 645	48	57	15 183	15 695

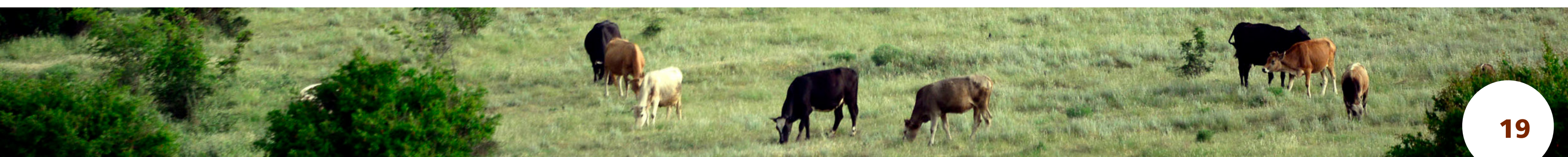
Notes:
a). The European Union includes data for the United Kingdom of Great Britain and Northern Ireland in all meat categories.
b). Total meat includes bovine, ovine, pig, poultry and other meats, all expressed in carcass weight equivalents.



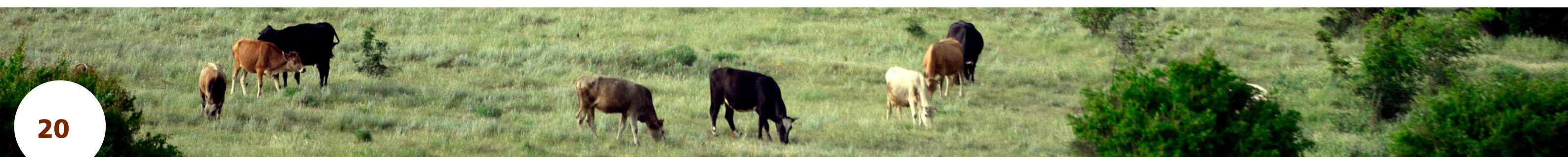
Bovine meat statistics	Production		Imports		Exports		Utilization	
	2020	2021	2020	2021	2020	2021	2020	2021
		estim.		*estim.*		*estim.*		*estim.*
ASIA	**19 172**	**19 986**	**6 653**	**6 953**	**1 570**	**1 693**	**24 248**	**25 234**
China	6 739	6 995	3 361	3 455	52	56	10 048	10 394
India	2 238	2 498	-	-	1 227	1 336	1 011	1 162
Indonesia	472	459	213	269	-	1	685	727
Iran (Islamic Republic of)	534	551	72	29	6	9	600	571
Japan	477	480	830	804	7	11	1 293	1 262
Malaysia	43	46	200	207	9	14	235	239
Pakistan	2 297	2 372	-	1	70	67	2 227	2 306
Philippines	180	180	151	194	3	5	328	370
Republic of Korea	287	304	560	598	5	6	842	896
AFRICA	**6 488**	**6 463**	**427**	**501**	**89**	**87**	**6 826**	**6 876**
Algeria	144	142	42	10	-	-	187	151
Angola	105	105	14	14	-	-	119	119
Egypt	571	584	242	339	2	1	811	922
South Africa	1 039	1 026	4	5	62	58	981	974
CENTRAL AMERICA & THE CARIBBEAN	**2 902**	**2 963**	**349**	**381**	**570**	**607**	**2 682**	**2 738**
Mexico	2 081	2 129	192	207	341	368	1 932	1 968
SOUTH AMERICA	**16 385**	**15 846**	**485**	**629**	**4 165**	**4 132**	**12 706**	**12 344**
Argentina	3 168	2 977	13	7	829	750	2 352	2 235
Brazil	10 100	9 500	48	59	2 500	2 327	7 648	7 232
Chile	223	210	328	445	27	20	524	635
Colombia	751	767	7	9	41	68	717	708
Uruguay	519	668	46	41	391	528	174	181
NORTHERN AMERICA	**13 719**	**14 169**	**1 727**	**1 695**	**1 897**	**2 226**	**13 507**	**13 657**
Canada	1 330	1 439	271	237	504	589	1 091	1 085
United States of America	12 389	12 730	1 456	1 458	1 393	1 637	12 417	12 572
EUROPE	**10 520**	**10 447**	**1 400**	**1 314**	**1 434**	**1 439**	**10 487**	**10 322**
European Union	6 902	6 883	340	310	923	901	6 320	6 291
Russian Federation	1 634	1 635	374	317	74	103	1 934	1 850
Ukraine	345	322	8	10	32	39	321	293
United Kingdom of Great Britain and Northern Ireland	932	885	526	505	161	139	1 297	1 252
OCEANIA	**2 862**	**2 654**	**53**	**55**	**2 024**	**1 899**	**891**	**810**
Australia	2 123	1 888	17	22	1 412	1 245	728	665
New Zealand	727	754	13	11	611	651	128	114
WORLD	**72 049**	**72 528**	**11 095**	**11 529**	**11 749**	**12 083**	**71 348**	**71 982**
LIFDC	5 776	5 776	123	142	171	184	5 728	5 735
LDC	4 625	4 622	82	100	13	14	4 694	4 708



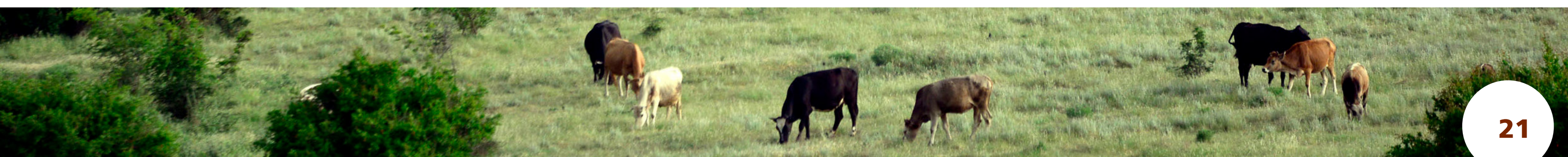
Ovine meat statistics	Production		Imports		Exports		Utilization	
	2020	2021	2020	2021	2020	2021	2020	2021
		estim.		*estim.*		*estim.*		*estim.*
ASIA	**9 873**	**10 192**	**645**	**661**	**24**	**20**	**10 494**	**10 833**
Bangladesh	237	238	-	-	-	-	237	238
China	4 925	5 142	391	439	2	2	5 314	5 579
India	836	839	-	-	8	8	828	831
Iran (Islamic Republic of)	336	341	8	-	-	-	344	342
Pakistan	748	765	-	-	7	4	741	761
Saudi Arabia	146	148	20	23	-	-	166	171
Türkiye	436	480	-	-	-	1	436	480
AFRICA	**3 382**	**3 385**	**10**	**9**	**28**	**40**	**3 365**	**3 355**
Algeria	355	355	-	-	-	-	355	355
Nigeria	412	408	-	-	-	-	412	409
South Africa	177	175	2	2	1	3	177	174
CENTRAL AMERICA & THE CARIBBEAN	**129**	**131**	**9**	**8**	**1**	**2**	**138**	**138**
Mexico	105	107	3	1	1	2	107	106
SOUTH AMERICA	**337**	**349**	**3**	**3**	**24**	**33**	**315**	**318**
Brazil	141	142	3	3	-	-	144	145
NORTHERN AMERICA	**91**	**90**	**156**	**191**	**2**	**3**	**245**	**278**
United States of America	74	74	133	166	2	2	205	238
EUROPE	**1 196**	**1 164**	**203**	**169**	**141**	**115**	**1 257**	**1 217**
European Union	571	588	135	113	47	37	659	664
Russian Federation	215	194	2	-	-	-	216	194
United Kingdom of Great Britain and Northern Ireland	296	265	60	48	88	70	268	243
OCEANIA	**1 129**	**1 122**	**24**	**26**	**848**	**854**	**305**	**294**
Australia	667	678	1	2	446	458	222	221
New Zealand	462	444	3	3	402	396	63	51
WORLD	**16 139**	**16 434**	**1 050**	**1 067**	**1 069**	**1 066**	**16 118**	**16 432**
LIFDC	3 085	3 076	3	3	26	36	3 061	3 042
LDC	2 483	2 503	2	2	14	22	2 471	2 483



Pig meat statistics	Production		Imports		Exports		Utilization	
	2020	2021	2020	2021	2020	2021	2020	2021
		estim.		*estim.*		*estim.*		*estim.*
ASIA	**53 220**	**65 018**	**8 350**	**7 694**	**243**	**257**	**61 368**	**72 511**
China	42 069	53 901	5 735	4 770	119	125	47 685	58 546
India	336	330	1	1	1	2	336	329
Indonesia	281	324	3	4	-	-	283	328
Japan	1 306	1 318	1 418	1 424	4	4	2 738	2 764
Malaysia	221	217	21	23	4	3	237	237
Philippines	1 500	1 188	95	332	2	2	1 592	1 518
Republic of Korea	1 403	1 407	562	579	6	11	1 984	2 006
Thailand	894	892	2	1	57	44	838	848
Viet Nam	3 550	3 728	225	238	12	11	3 764	3 954
AFRICA	**1 588**	**1 605**	**253**	**284**	**28**	**32**	**1 813**	**1 857**
Madagascar	27	26	-	-	-	-	27	26
Nigeria	303	287	5	8	-	-	307	295
South Africa	302	326	23	34	25	27	300	333
Uganda	131	131	1	1	-	-	132	131
CENTRAL AMERICA & THE CARIBBEAN	**2 103**	**2 141**	**1 257**	**1 538**	**377**	**355**	**2 984**	**3 324**
Cuba	128	126	11	19	-	-	139	145
Mexico	1 652	1 693	977	1 191	352	333	2 276	2 551
SOUTH AMERICA	**6 865**	**7 362**	**345**	**537**	**1 604**	**1 745**	**5 606**	**6 154**
Argentina	655	695	26	50	28	20	652	725
Brazil	4 482	4 891	2	3	1 274	1 452	3 210	3 442
Chile	574	590	136	189	294	267	416	511
Colombia	440	461	90	152	-	-	530	613
NORTHERN AMERICA	**15 144**	**14 868**	**802**	**946**	**4 691**	**4 536**	**11 351**	**11 264**
Canada	2 299	2 309	307	298	1 557	1 493	1 064	1 089
United States of America	12 845	12 559	495	649	3 134	3 043	10 287	10 175
EUROPE	**30 359**	**30 926**	**1 388**	**1 311**	**6 010**	**5 749**	**25 736**	**26 488**
Belarus	403	396	30	48	36	43	397	401
European Union	23 220	23 615	166	105	5 385	5 198	18 001	18 522
Russian Federation	4 282	4 389	37	44	194	206	4 124	4 227
Serbia	304	300	49	57	21	19	332	338
Ukraine	697	723	39	57	5	8	732	772
United Kingdom of Great Britain and Northern Ireland	984	1 023	946	857	353	259	1 577	1 621
OCEANIA	**566**	**592**	**281**	**310**	**37**	**42**	**810**	**860**
Australia	419	444	203	211	36	40	586	615
Papua New Guinea	83	84	7	7	-	-	90	91
WORLD	**109 845**	**122 512**	**12 676**	**12 621**	**12 990**	**12 716**	**109 668**	**122 458**
LIFDC	1 000	997	181	172	2	3	1 179	1 166
LDC	2 254	2 317	161	172	-	1	2 415	2 488

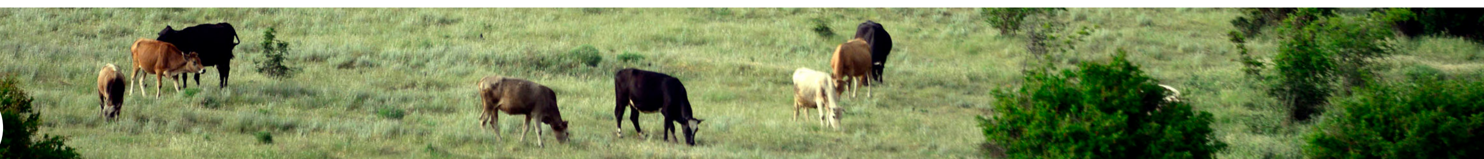


Poultry meat statistics	Production		Imports		Exports		Utilization	
	2020	2021	2020	2021	2020	2021	2020	2021
		estim.		*estim.*		*estim.*		*estim.*
ASIA	**53 066**	**54 055**	**7 287**	**7 193**	**2 805**	**3 002**	**57 537**	**58 204**
China	24 391	24 585	2 189	1 821	583	678	25 998	25 727
India	3 597	3 767	-	-	4	4	3 593	3 764
Indonesia	3 683	3 889	-	-	2	2	3 681	3 887
Iran (Islamic Republic of)	2 231	2 183	-	70	74	33	2 157	2 220
Japan	2 348	2 369	1 239	1 316	10	6	3 587	3 679
Kuwait	60	58	147	146	8	9	199	195
Malaysia	1 598	1 607	71	97	52	63	1 617	1 641
Republic of Korea	1 047	1 018	192	198	58	45	1 171	1 161
Saudi Arabia	901	910	640	632	37	47	1 504	1 495
Thailand	1 844	1 827	2	2	1 198	1 219	636	576
Türkiye	2 201	2 305	45	41	573	666	1 673	1 679
AFRICA	**6 723**	**6 821**	**2 062**	**2 328**	**116**	**119**	**8 670**	**9 030**
Angola	52	53	224	276	-	-	276	330
South Africa	1 881	1 924	486	433	57	56	2 309	2 301
CENTRAL AMERICA & THE CARIBBEAN	**5 282**	**5 415**	**1 752**	**1 970**	**35**	**38**	**6 999**	**7 347**
Cuba	16	16	256	340	-	-	272	357
Mexico	3 617	3 707	1 001	1 092	12	10	4 606	4 789
SOUTH AMERICA	**22 184**	**23 010**	**357**	**464**	**4 497**	**4 810**	**18 045**	**18 664**
Argentina	2 316	2 296	7	11	227	216	2 096	2 091
Brazil	14 379	15 098	5	5	4 080	4 407	10 304	10 696
Chile	768	752	130	187	181	178	716	761
NORTHERN AMERICA	**24 603**	**24 722**	**370**	**383**	**4 085**	**4 183**	**20 935**	**20 978**
Canada	1 473	1 535	211	210	173	183	1 509	1 561
United States of America	23 130	23 187	159	173	3 911	4 000	19 426	19 417
EUROPE	**22 649**	**22 146**	**2 160**	**2 106**	**3 891**	**3 607**	**20 914**	**20 650**
European Union	13 669	13 298	634	598	2 403	2 178	11 900	11 717
Russian Federation	4 577	4 499	238	256	319	338	4 491	4 422
Ukraine	1 414	1 383	114	128	436	464	1 092	1 047
United Kingdom of Great Britain and Northern Ireland	1 976	1 980	951	880	498	384	2 428	2 476
OCEANIA	**1 537**	**1 604**	**104**	**117**	**69**	**81**	**1 572**	**1 639**
Australia	1 282	1 345	3	3	44	52	1 240	1 296
New Zealand	219	226	1	1	25	29	195	198
WORLD	**136 045**	**137 772**	**14 093**	**14 561**	**15 497**	**15 839**	**134 672**	**136 512**
LIFDC	2 390	2 393	1 381	1 657	12	12	3 759	4 037
LDC	3 518	3 723	1 170	1 361	20	20	4 667	5 064



Appendix table prices

	Bovine meat prices			Ovine meat price		Pig meat prices			Poultry meat price	
	Australia	United States	Brazil	New Zealand	Australia	United States	Brazil	Germany	United States	Brazil
Period	*(...USD per tonne...)*									
Annual (Jan/Dec)										
2011	3 944	5 093	5 078	5 531	5 547	3 036	2 941	2 169	1 149	1 977
2012	4 176	5 885	4 765	4 656	4 486	2 952	2 700	2 233	1 228	1 889
2013	4 009	6 314	4 527	4 130	4 132	2 981	2 797	2 311	1 229	1 972
2014	5 016	7 361	4 712	4 701	4 686	3 233	3 411	2 106	1 205	1 886
2015	4 699	7 195	4 320	3 643	4 042	2 669	2 482	1 582	1 002	1 604
2016	4 171	6 390	4 053	3 578	3 978	2 648	2 129	1 682	914	1 501
2017	4 463	6 676	4 196	4 488	4 710	2 687	2 475	1 871	1 000	1 631
2018	4 198	7 118	4 045	5 244	4 979	2 587	1 959	1 728	970	1 537
2019	4 873	7 119	4 119	5 127	5 097	2 626	2 245	1 989	972	1 618
2020	4 676	6 898	4 336	4 561	5 071	2 569	2 370	1 834	962	1 407
2021	5 544	8 313	5 032	5 643	5 898	2 756	2 432	1 655	1 164	1 626
Monthly										
2021 – January	4 751	7 127	4 511	4 711	5 663	2 573	2 459	1 512	977	1 456
2021 – February	4 920	7 223	4 539	4 683	5 912	2 634	2 424	1 527	1 049	1 461
2021 – March	4 859	7 242	4 612	4 553	5 851	2 695	2 523	1 806	1 117	1 497
2021 – April	5 205	7 667	4 766	4 741	5 876	2 785	2 490	1 831	1 189	1 508
2021 – May	5 605	7 735	4 934	5 209	5 934	2 863	2 605	1 884	1 143	1 554
2021 – June	5 772	8 167	5 181	5 596	5 804	2 907	2 612	1 898	1 172	1 609
2021 – July	5 698	8 663	5 443	5 922	5 815	3 019	2 498	1 783	1 272	1 717
2021 – August	5 782	8 802	5 680	6 334	5 988	2 822	2 403	1 651	1 214	1 748
2021 – September	5 784	8 987	5 788	6 576	6 172	2 707	2 378	1 559	1 206	1 714
2021 – October	5 889	9 284	5 167	6 680	6 177	2 667	2 293	1 485	1 200	1 757
2021 – November	6 043	9 598	4 932	6 593	5 828	2 707	2 256	1 452	1 217	1 768
2021 – December	6 218	9 267	4 826	6 116	5 758	2 694	2 237	1 472	1 207	1 720



FAO indices					
	Total meat	**Bovine meat**	**Ovine meat**	**Pig meat**	**Poultry meat**
Period	*(...2014-2016=100...)*				
Annual (Jan/Dec)					
2011	**105**	88	135	112	117
2012	**105**	93	111	111	115
2013	**106**	93	101	113	118
2014	**112**	107	114	117	114
2015	**97**	102	94	92	96
2016	**91**	91	92	92	90
2017	**98**	96	112	98	98
2018	**95**	96	124	91	93
2019	**100**	101	124	98	96
2020	**96**	100	117	94	87
2021	**108**	118	141	94	102
Monthly					
2021 – January	**96**	103	126	88	89
2021 – February	**98**	105	129	90	91
2021 – March	**101**	105	127	97	95
2021 – April	**104**	111	129	99	97
2021 – May	**107**	115	136	102	98
2021 – June	**111**	120	139	103	101
2021 – July	**114**	124	143	102	108
2021 – August	**113**	127	150	95	108
2021 – September	**113**	129	155	91	107
2021 – October	**112**	127	157	89	108
2021 – November	**113**	129	151	89	109
2021 – December	**111**	128	145	89	107

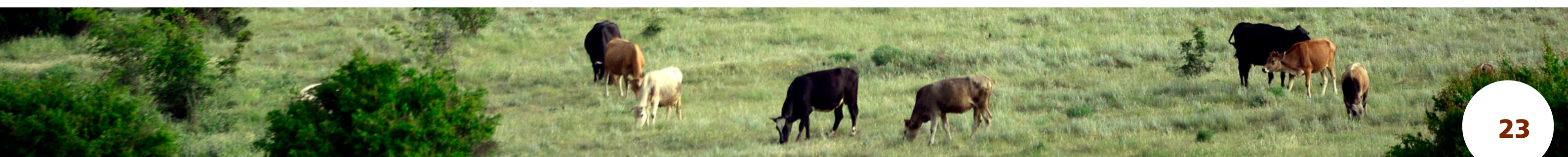
Bovine meat prices:
Australia: Cow 90CL export prices to the USA (FAS).
USA: Meat of bovine (Fresh, Chilled or Frozen), export unit value.
Brazil: Meat of bovine (Fresh, Chilled or Frozen), export unit value.

Ovine meat prices:
New Zealand: Lamb 17.5kg NZ$/kg.
Australia: Medium trade lamb 18-20kg A¢/kg.

Pig meat prices:
USA: Meat of Swine (Fresh, Chilled or Frozen), export unit value.
Brazil: Meat of Swine (Fresh, Chilled or Frozen), export unit value.
Germany: Monthly market price for pig carcase grade E.

Poultry meat prices:
USA: Chicken Cuts and Edible Offal (Fresh, Chilled or Frozen), export unit value.
Brazil: Meat and Edible Offal of Poultry (Fresh, Chilled or Frozen), export unit value.

The FAO Meat Price Indices consist of 2 poultry meat product quotations (the average weighted by assumed fixed trade weights), 3 bovine meat product quotations (average weighted by assumed fixed trade weights), 3 pig meat product quotations (average weighted by assumed fixed trade weights), 2 ovine meat product quotation (average weighted by assumed fixed trade weights): the four meat group average prices are weighted by world average export trade shares for 2014/2016.



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