Food and Agriculture
Organization of the
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MEAT MARKET REVIEW

Overview of market and policy developments in 2022

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The Meat Market Review is a product of the FAO Markets and Trade Division of the Economic and Social Development Stream and prepared under the overall guidance of Boubaker Ben-Belhassen, Director. The report was written by Upali W. Galketi Aratchilage and Emanuele Marocco, and Ettore Vecchione and Jonathan Hallo prepared the publication layout.

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HIGHLIGHTS

- Since reaching an all time high in June 2022, the FAO Meat price index trended downward.
- Disease outbreaks, high input costs and extreme weather events challenged meat production growth.
- Global economic downturn led to global meat trade drop.

International meat prices

International meat prices reached an all-time high in 2022, mostly due to supply limitations

International meat prices, as measured by the FAO Meat Price Index, averaged 118.8 in 2022, registering the highest on record, up 11.1 points (10.3 percent) from 2021. Besides registering the highest average value on record, the index also registered a steep increase in the first half of the year with a similarly sharp drop in the second half. While tight supplies across nearly all meat types in leading exporting countries were behind price increases in the first half of the year, prices fell in the second half, reflecting sluggish import demand from leading meat importers, due to a less active hospitality industry, increased national production in large meat-importing countries, global economic downturns and high food import bills.

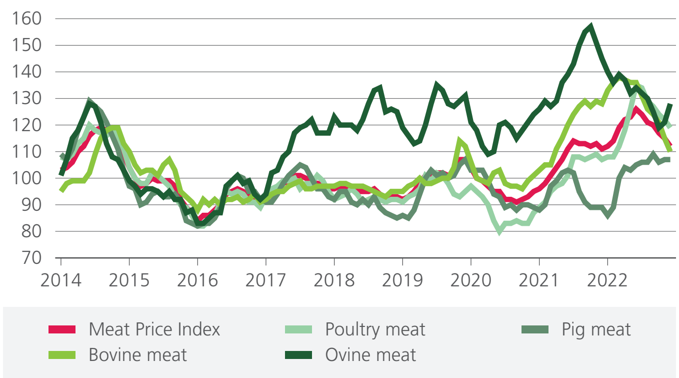
The increase in the index in 2022 reflected steep increases in poultry, bovine and pig meat sub-indices, while the ovine meat sub-index fell. International poultry meat prices continued to rise in the first half of the year, reaching an all-time high in June 2022, underpinned by tight global supplies, as poultry meat production did not expand in tandem with high demand due to widespread avian influenza outbreaks, increased feed costs, labour shortages and the continued supply-chain bottlenecks. Meanwhile, greater affordability of poultry meat encouraged consumers to switch to poultry meat, tightening export availabilities in leading supplying countries and sustaining price increases.

Following an upward trend that began in the last quarter of 2020, international bovine meat prices kept on rising and reached an all-time high in March 2022, driven mainly by tight supplies, stemming from a limited supply of slaughter-ready cattle and high demand for herd rebuilding. Since April 2022, however, bovine meat prices have been falling, reflecting increased export availabilities, mainly from Brazil on subdued internal demand and Oceania due to rising cattle supplies.

International pig meat prices continued to increase until the end of the third quarter in 2022 and remained elevated, with occasional month-to-month drops in prices. The price increase in 2022 was underpinned by tight supplies from leading exporting countries, especially the European Union and the United States of America (United States), reflecting scaled-back production amid the continued impact of the African Swine fever (ASF) virus and high feed prices. Meanwhile, import demand entered a slower pace in China, principally underpinned by the country's production recovery, as hog stocks rose, recovering from ASF outbreaks, stabilizing international pig meat prices at elevated levels.

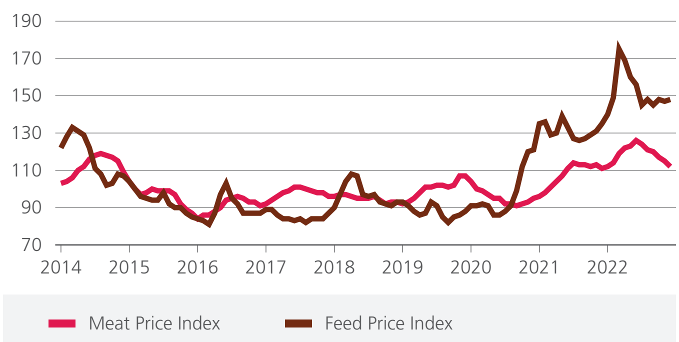
By contrast, ovine meat prices reached an all-time high in October 2021, but prices trended downward since then because of subdued import demand from China and increased export supplies from Australia.

Figure 1. FAO Meat Price Indices



Source: FAO.

Figure 2. FAO Meat and Feed Price Indices
2014-2016=100



Source: FAO.

Trends in overall meat production and trade

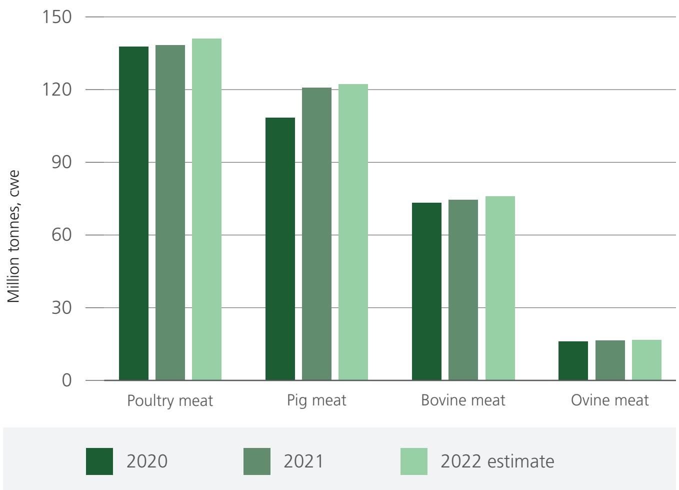
Global meat production expanded but trade contracted slightly

World meat production[1] reached 362.4 million tonnes (in carcass weight equivalent) in 2022, up 1.6 percent from 2021. Production of all meat categories increased, with much of the expansion stemming from poultry meat output, followed by pig meat, bovine and ovine meats. Regionally, Asia drove the global meat output expansion, primarily increased pig meat output in China, and to a lesser extent, South America, notably bovine meat in Brazil, with some production increases in the other regions, partially offset by reduced production in Europe due to lower pig meat production concentrated in the European Union.

The direction and extent of meat production in 2022 were heavily influenced by several interrelated factors. A primary factor was high input costs, especially feed costs, which led farmers to liquidate their livestock ahead of their normal sales schedules to minimize financial losses. In the meantime, drier conditions in some leading producer regions constrained the availability and quality of fodder. Steep rise in animal feed supplies and ingredients due to sharp increases in prices of feed grains and oilmeals led farmers to limit placing animals in feedlots or hatching operations, further impacting industrial-scale meat production operations on the one hand, and inducing early sale of even productive dairy cows. Notwithstanding these challenges, the poultry meat sector performed better, benefitting from the shorter production cycle and the capacity to manage input costs and high consumer demand.

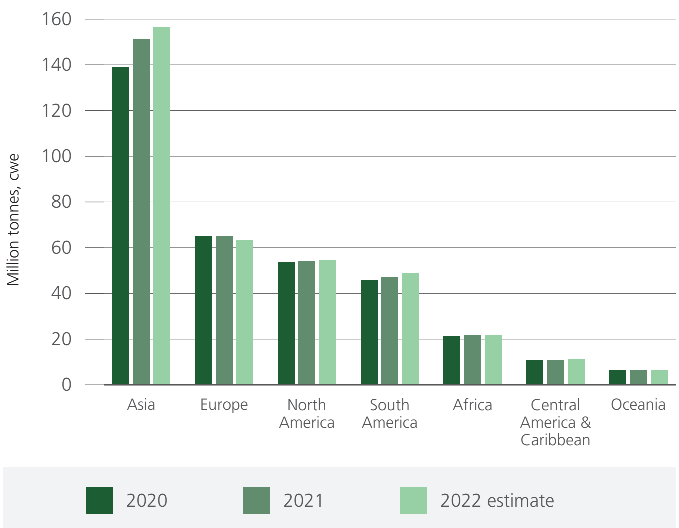
Animal diseases, especially ASF and highly pathogenic avian influenza (HPAI) outbreaks, constrained pig and poultry meat production and negatively influenced investments, thus limiting long-term growth prospects. Likewise, incidences of foot and mouth disease (FMD) led some countries to impose import controls, lowering bovine meat production in several countries. Furthermore, the post-pandemic meat demand remained subdued due to the slow recovery process amid the continued disruptions to meat production value chains and market uncertainties. Moreover, the Chinese zero-COVID-19 policy was relaxed only at the tail end of 2022, which heavily restrained meat demand from the hotel, restaurant and institution (HRI) sector, with a cascading impact on the global meat trade and production.

Figure 3. Global meat production by type



Source: FAO.

Figure 4. Global meat production by region



Source: FAO.

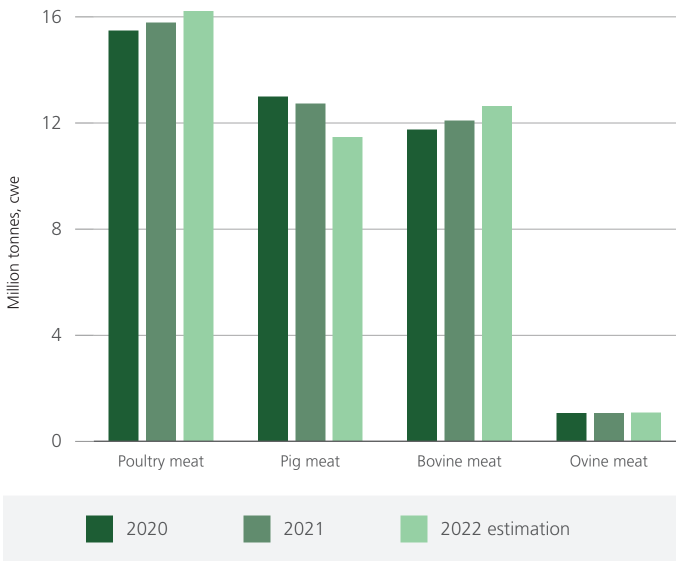
[1] *This refers to the total volume of meat derived from bovine, pig, poultry, ovine and other animals, in carcass weight equivalents.*

Global meat trade reached 41.8 million tonnes in 2022, down by 0.6 percent from 2021, reflecting a 22 percent drop in meat imports by China year-on-year amid increased availability from national sources. This was particularly the case for pig meat imports, which decreased significantly in tandem with increased availabilities from national sources at much lower domestic prices with the control of the spread of the ASF virus. Similarly, increased supplies from national sources led to meat import curtailments in several other countries, including Chile, the Russian Federation, Viet Nam, South Africa and Canada.

High food price inflation and challenging economic conditions faced by many meat import countries also constrained meat trade expansion in 2022. This combination lowered household demand for meat significantly, notwithstanding a limited growth in meat demand from the food services sector. However, meat imports expanded in several countries where food import constitutes a smaller percentage of household incomes such as the United Kingdom of Great Britain and Northern Ireland (United Kingdom), the European Union, the United States, the Republic of Korea and Malaysia, while in some other cases, governments slashed import duties to reduce consumer burden leading to higher imports, e.g., the Philippines.

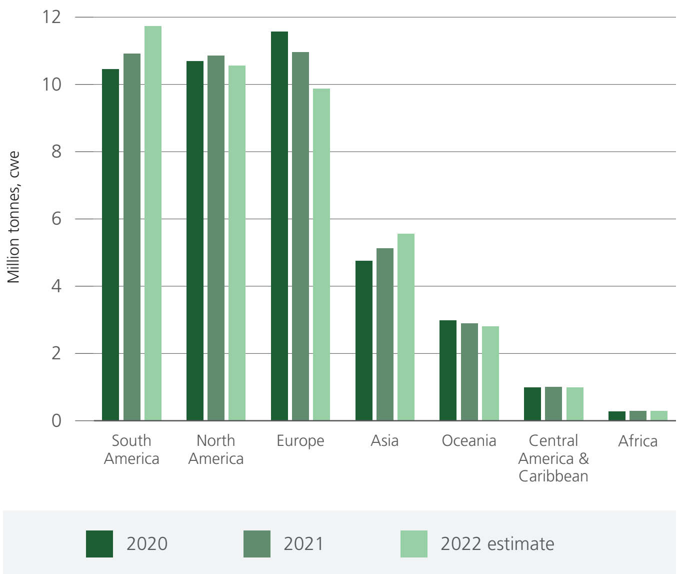
Amid weak import demand for meat products, some leading exporters scaled back their shipments in 2022. This was especially the case for the European Union, the United States, Canada, Belarus and New Zealand. As for Ukraine, the disruption of meat production and logistical challenges led to a decline in exports despite a rebound in poultry meat deliveries during the latter part of the year. Notwithstanding the challenging global meat production and trading environment, exports increased from several countries in 2022, especially Brazil, China, Thailand, the Russian Federation, Türkiye, Argentina and India, mostly benefitting from increased availabilities and competitive export prices. Among the main meat types, bovine meat exports expanded the most, followed by poultry and ovine meats, while those of pig meat contracted.

Figure 5. Global meat exports by type



Source: FAO.

Figure 6. Global meat trade by region



Source: FAO.

Performance of production and trade by meat type

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

Production and trade expanded despite widespread HPAI outbreaks

World poultry meat production reached 141 million tonnes in 2022, up 1.9 percent from 2021. The highest volume expansions occurred in Asia and the Americas, with some gains in Oceania, while Africa and Europe registered declines. At the country level, much of the output expansion originated in **China, Indonesia,** the **United States** and **Brazil**, partially offset by declines registered in **Egypt,** the **European Union** and the **Islamic Republic of Iran.**

High demand for affordable meat types amid soaring food inflation and lower household incomes drove an increase in global poultry meat production. However, despite high demand, poultry meat production expanded only at a moderate pace as the sector was challenged by rising input costs, labour shortages and widespread outbreaks of the HPAI virus in several major producing regions, especially Europe and North America. Improved production techniques helped **China** to increase poultry meat production despite limitations to accessing imported genetic materials of grandparent generation broilers due to the detection of HPAI in major poultry genetics exporting countries. In the meantime, poultry meat production in **Indonesia** reached 4.3 million tonnes, rising by 16 percent year-on-year, benefitting from high demand for poultry meat as an alternative to bovine meat, mostly imported and expensive, and pig meat, which is not consumed by a large section of the population. Despite pressure due to the spread of HPAI, poultry meat production in the **United States** increased as internal demand remained strong, while trade continued with regionalization arrangements to exclude exports from HPAI-affected regions. **Brazil**'s poultry meat production expanded at a slower pace of 1.9 percent, after a 6 percent increase in 2021, as high input costs weighed heavily on chick placements but continued to benefit from high foreign demand due to HPAI-free status.

By contrast, widespread HPAI cases and lower import demand led to a drop in poultry meat production in the **European Union**. Foreign currency shortage, devaluation of Egypt's pound and heavy dependence on imported feed were behind **Egypt** poultry meat production fall. Squeezed profit margins due to high feed prices and farm-gate price caps imposed by the government to contain food price inflation, coupled with a contraction in domestic demand prompted farmers to scale down operations, leading poultry meat production to decline in the **Islamic Republic of Iran**.

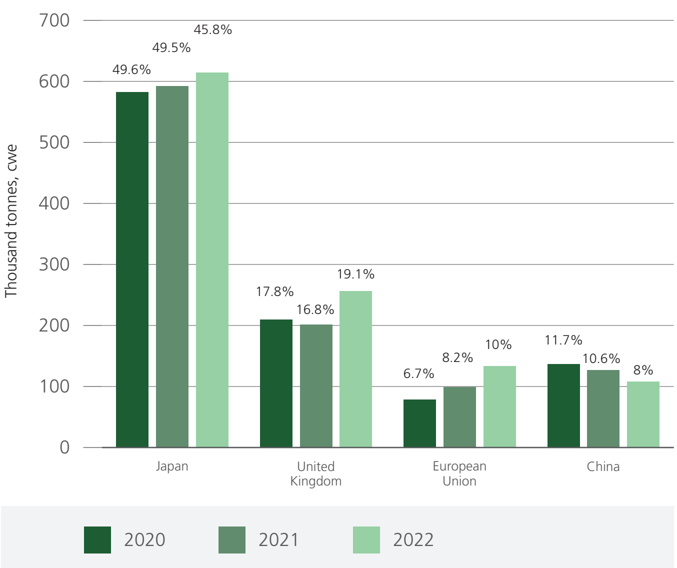
World trade in poultry meat in 2022 reached 16.2 million tonnes, up 2.6 percent from 2021, with significant volume expansions in Asia and the Americas, along with slight increases in Oceania and Africa, partially offset by lower trade in Europe. The reopening of food services following the removal of COVID-19 restrictions across leading poultry meat-importing countries underpinned much of the expansion of global trade in poultry meat. Moreover, higher poultry meat imports also stemmed from stronger demand from countries where production faced setbacks due to high HPAI incidences, and elsewhere, due to reduced tariffs and trade barriers.

Regarding country-level performance, the **United Kingdom, Iraq,** the **United Arab Emirates, Angola, Malaysia** and the **European Union** have seen growth in imports, partially offset by declines concentrated in **China, South Africa** and **Mexico**, among others. In the **United Kingdom** and the **European Union**, poultry imports increased by 33 and 11 percent, respectively, mainly reflecting intra-trade between the two trading partners, but also with increased imports from Thailand. In the case of the United Kingdom, imports from the European Union exceeded pre-Brexit levels due to recovery in the food services sector and a production contraction linked to HPAI outbreaks. Increased domestic demand led to more poultry meat imports in **Iraq**, the **United Arab Emirates** and **Angola**, mainly sourced from Türkiye, Brazil and the United States, respectively. Poultry meat imports nearly doubled in **Malaysia**, as the government authorized more imports in its efforts to contain inflation and build a buffer stock to optimize the use of state-owned cold storage facilities.

By contrast, poultry meat imports declined in **China**, mainly due to weak internal demand, partly reflecting the continued COVID-19-related restrictions, together with import controls or bans imposed over HPAI concerns. In **South Africa**, elevated global poultry prices were exacerbated by high import tariffs, leading to a contraction in imports. Despite the suspension of anti-dumping duties on poultry imports in August 2022 from Brazil, Denmark, Ireland, Poland and Spain, this created a shortage, leading to a fall in domestic supply, well below internal demand, and causing a reduction in per capita consumption level. High international poultry meat prices, especially from the United States, its main source, together with higher domestic production, led to an import contraction in **Mexico** in 2022.

Much of the increased import demand was largely supplied by **Brazil, Thailand, China, Türkiye,** the **United States** and the **Russian Federation**, benefitting from increased production. By contrast, exports fell from the **European Union**, the **United Kingdom** and **Ukraine**, where the elimination of trade barriers by the European Union could only partially offset the decline in deliveries due to the ongoing war -related disruptions.

Figure 7. Main destinations and market shares of poultry meat exports of Thailand



Source: FAO, based on Trade Data Monitor (TDM).

Bovine meat

Expanded output in Asia and the Americas led to production growth

Bovine meat output in 2022 reached 75.8 million tonnes, up 1.7 percent from 2021, driven by output expansions in Asia and the Americas, partially offset by declines in Europe, Africa and Oceania. Considering major producers, much of the production increase was concentrated in **Brazil, China,** the **United States, India** and **Argentina**, while the **European Union,** the **Russian Federation, Uruguay** and **Colombia** registered production setbacks.

In **Brazil**, higher availability of cattle for slaughter, together with high import demand, enabled bovine meat production to expand by 6.2 percent year-on-year. Likewise, **China**'s bovine meat output expanded by around 3 percent in 2022 due to an abundant supply of cattle and calves, higher carcass weights, benefitting from gains in genetics and fattening efficiency, and rising domestic consumption. Production increased in 2022 by 1.2 percent, a slowdown in the pace of growth compared to the previous year in the **United States**, stemming from high beef cow and heifer slaughter. Meanwhile, bovine meat output in India surged by 3.7 percent, reflecting increased international demand for carabeef, especially in the Middle East and Southeast Asia. **Argentina**'s bovine meat production recovered from the fall in 2021, mostly helped by increased availability of cattle, reflecting a high liquidation rate in advance of the normal selling cycle in light of feed shortages, dry weather conditions prevailed in the country and high international demand.

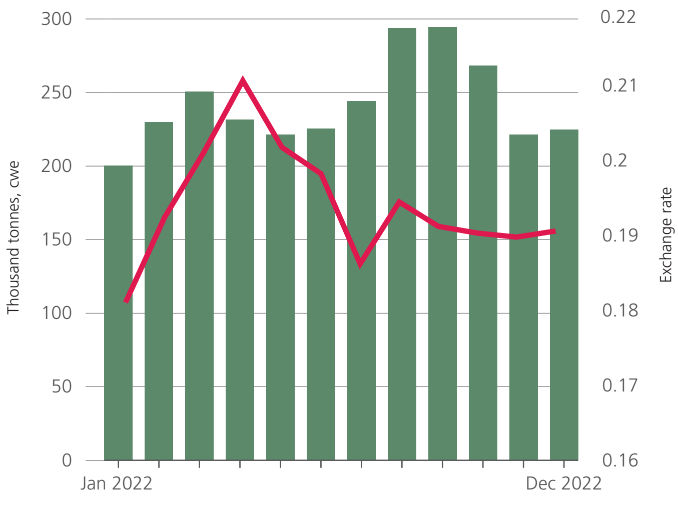
By contrast, bovine meat production in the **European Union** fell by 2.3 percent amid the continued decline in cattle herd, accelerated by increased input costs. Likewise, in the **Russian Federation**, production registered a contraction due to weak internal demand and the impact of the war on farm operations. In **Uruguay**, after a strong rise in the first 5 months of 2022, slaughter substantially declined by a monthly average of 22 percent, influenced by reduced import demand from China. **Colombia**'s bovine meat production also fell due to lower slaughter amid reduced domestic consumption.

World total bovine meat trade in 2022 increased by 4.8 percent to 12.7 million tonnes, with much of the shipments originating in South America, partially offset by contractions in Oceania and Europe. At the country level, **Brazil, Argentina, India, Mexico,** the **United States** and **Paraguay** registered the most significant export expansions, with significant contractions in the **European Union** and **Australia**.

In **Brazil**, bovine meat exports rebounded from the previous year's decline, increasing by nearly 25 percent, with a 48 percent increase in shipments to China with the end of the Chinese ban on Brazilian bovine meat imports in December 2021. In addition, the depreciation of the Brazilian real against the United States dollar favoured exports to other destinations, with larger volumes destined to Egypt, the Philippines, the United Arab Emirates and Venezuela (Bolivarian Republic of), among others, while exports to the United States and Chile declined. Similarly, **Argentina** increased its deliveries on rising international demand, especially from China. Growing demand for carabeef drove deliveries from **India** to rise by around 3 percent. A decline in exports to Egypt, mainly due to the country's currency depreciation, was counterbalanced by increased exports to Malaysia, which emerged as the second largest export destination in 2022, with double-digit percentage gains also to Viet Nam, Indonesia, Iraq and Saudi Arabia, among others. High international bovine meat prices led producers in **Mexico** to increase carcass weights and export more bovine meat, rather than exporting live animals, registering 11.2 percent increase in deliveries, with the **United States** market absorbing 80 percent of total exports. The United States exported more bovine meat year-on-year in 2022, mainly reflecting higher demand from China. **Paraguay** also managed to boost its sales, especially to China and Brazil, despite a ban imposed by the Russian Federation in September 2022 on the four largest bovine meat exporting establishments.

Regarding imports, **China,** the **European Union** and **Malaysia** imported more bovine meat in 2022 due to difficulties in increasing national output to meet domestic demand. By contrast, **Chile, Egypt, Japan** and the **Russian Federation** imported less bovine meat due to lower domestic demand or increased national production.

Figure 8. Bovine meat exports of Brazil and USD/BRL exchange rate



Source: FAO, based on Trade Data Monitor (TDM).

Pig meat

Production recovery in China lowered global trade

World pig meat output reached 122.3 million tonnes, up 1.2 percent from 2021, principally driven by a significant production expansion in Asia, together with moderate increases in South America. However, production contracted in Europe and North America. In terms of country-level performance, **China** registered the steepest expansion, registering an increase of 2.5 million tonnes from 2021, to a total of 56.4 million tonnes in 2022. Herd rebuilding efforts, following the devastating impact of ASF, induced strong pig meat production growth in 2021, which continued in 2022, leading the output to exceed the pre-ASF level. High slaughter rates, especially in the first part of the year, have driven the expansion amid higher domestic prices and growing internal demand. Elsewhere, production increases were registered in countries where ASF outbreaks have been brought under control, despite occasional outbreaks, including in **Viet Nam,** the **Russian Federation** and the **Philippines**. Despite elevated feed and production costs, pig meat production expanded by around 6 percent in **Brazil** on growing global and internal demand. Similarly, **Colombia** registered a more than 12 percent production increase on high domestic demand, benefitting from the exemption of import tariff implemented by the government on 39 agricultural inputs, including animal feed, aiming to reduce food production costs for one year.

High global production costs, together with the continued ASF outbreaks constrained herd expansion in some major producing countries, namely the **European Union,** the **United States** and **Thailand**. Production in the **European Union** contracted by 5.7 percent year-on-year amid reduced prospects for exports to China, increasing input costs and ASF outbreaks. Likewise, in **Thailand**, an ASF outbreak was officially declared in January 2022, which disrupted production, causing a nearly 20 percent fall in pig meat output in 2022. Elevated feed and energy costs, coupled with an uncertain regulatory environment have driven pig meat production to contract by 2.5 percent in the **United States**. Meanwhile, among major producing regions, pig meat output in **Canada** and the **Republic of Korea** continued without much change from their respective levels in the previous year. Output in **Mexico** increased by 2.2 percent in 2022, driven by high domestic and international demand, associated with genetic improvements.

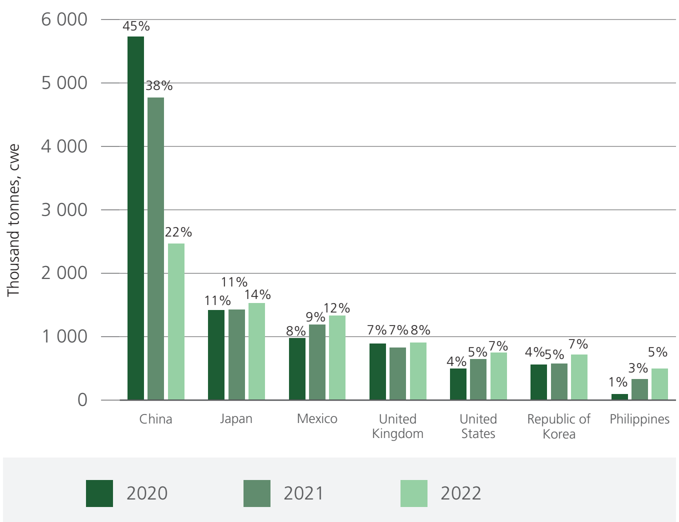
Global pig meat trade stood at 11.5 million tonnes in 2022, registering an around 10 percent contraction from 2021, largely reflecting lower import demand from Asia and, to a lesser extent, in South America, although imports from all other regions increased.

At the country level, much of the drop in global import demand in 2022 was due to a 48 percent drop in import purchases to 2.5 million tonnes by **China** –the world's largest pig meat importer– due to increased supplies from domestic sources and associated pig meat price drops. Still, China accounted for about 22.4 percent of global trade, although it is much lower compared to the 45.5 percent in 2020 and 38 percent in 2021. Similarly, pig meat imports declined in **Viet Nam**, influenced by abundant national supplies, while pig meat import contractions in **Chile** and **Canada** reflected reduced domestic demand.

The **Philippines, Mexico,** the **Republic of Korea, Japan** and the **United States**, partially counterbalanced import contractions elsewhere. In the **Philippines**, lowering import tariffs to 15 percent in-quota and 25 percent out of quota, triggered higher imports. While **Mexico** and the **United States** increased purchases to meet high internal demand, the **Republic of Korea** increased imports due to a combination of the revival of the food service sector, lowering of import prices for 70 000 tonnes under the new tariff rate quota system, and the acceptance of the principle of 'regionalisation' for ASF controls in European exporting countries. Similarly, **Japan** imported more reflecting higher demand from the food processing companies, with a 55 percent increase in imports from Spain due to competitive prices on offer and parallel declines in imports from the United States and Canada. Among others, the **United Kingdom** also saw its pig meat imports increase on rising domestic demand.

Concerning exports, weak demand in China led to lower sales from three out of the top four pig meat exporters, namely the **European Union,** the **United States** and **Canada**. While tight exportable supplies induced by high input costs and ongoing ASF outbreaks led to lower exports by the **European Union**, elevated production prices and the strong United States dollar against major currencies were behind the drop in exports from the **United States**. High demand from some Asian countries, especially the Philippines and the diversification of export destinations, drove sales expansion from **Brazil**, the third largest pig meat exporter, reaching around 13 percent of the global pig meat exports market share.

Figure 9. Main pig meat importers and their global market



Source: FAO, based on Trade Data Monitor (TDM).

Ovine meat

Increased export supplies in Australia led to trade expansion in 2022

World ovine meat output in 2022 reached 16.7 million tonnes, up 1.9 percent year-on-year, with much of the volume increase originating in Asia and Oceania, only partially offset by small declines in Africa, Europe and North America, while production remained largely unchanged in Central and South America. At the country level, the increase is mainly attributable to output growth in **Türkiye, China, Australia** and the **United Kingdom**, among others, partially offset by declines in **Ethiopia** and **New Zealand**.

Türkiye ovine meat production grew by 26 percent, reaching 605 000 tonnes, reflecting high domestic demand. Similarly, **China**, the largest ovine meat producer in the world, accounting for almost one-third of the global production, registered an around 2 percent increase. In **Australia**, production expanded by 7.6 percent due to increased national flock and high carcass weights mostly on improved pasture conditions under favourable weather conditions. In the **United Kingdom**, production rebounded from 2021 amid a rise in breeding flock and higher slaughter, despite pressure from higher input costs.

By contrast, a reduction in the herd size in **Ethiopia** due to poor pasture conditions and water shortages led to ovine meat production decline, whereas the production decline in **New Zealand** reflected dry weather conditions and labour shortages.

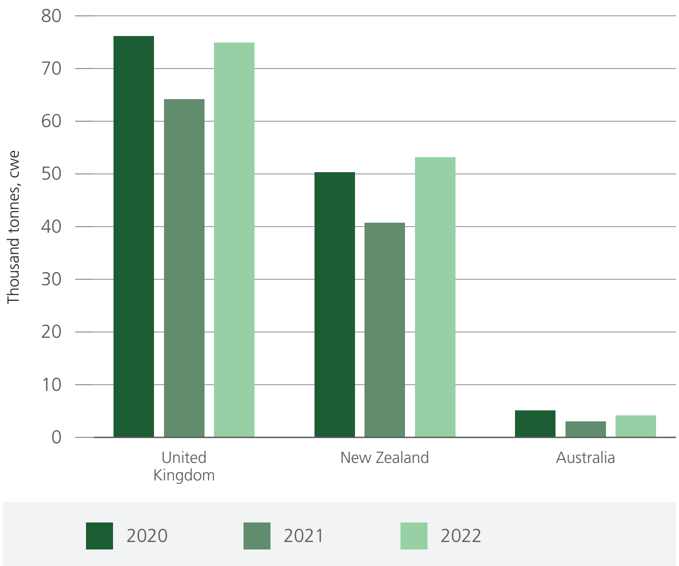
Despite favourable prices, a reduction of the sheep and goat flock size in the **European Union** led to 0.7 percent contraction in production.

World total exports of ovine meat increased by 2 percent to 1.1 million tonnes in 2022. Rising domestic supplies induced **China** to cut ovine meat purchases by around 13 percent. This contraction in China has been offset by increased imports from the **European Union, Malaysia,** the **United Kingdom** and **Saudi Arabia**, among others. A domestic output contraction and reduced logistic hurdles led the **European Union** to import more ovine meat, mainly sourced from the United Kingdom, New Zealand and Australia. Rising domestic demand has driven **Malaysia,** the **United Kingdom** and **Saudi Arabia** to import more ovine meat in 2022, mainly supplied by Oceania.

Much of the export expansion originated from **Australia, Kazakhstan,** the **United Kingdom** and **Türkiye** in 2022. Increased supplies have driven **Australian** exports to expand by 5 percent from 2021, increases to all secondary destinations, namely Malaysia, the Republic of Korea, the United Arab Emirates, Japan and Canada, among others, compensated for export declines to the top two destinations, namely China and the United States. Exports from **Kazakhstan** strongly rose, mainly to Uzbekistan, reflecting an increase of export permit granted to a larger number of meat packers in 2022.

At the same time, increased export availabilities led the **United Kingdom** to export more ovine meat, mainly to EU member countries. **Türkiye** registered sales growth in 2022, benefitting from high demand from the Middle Eastern countries. By contrast, ovine meat exports of **New Zealand** fell, reflecting limited import demand from its top destinations, especially China, the United Kingdom and the United States.

Figure 10. Main suppliers of ovine meat to the European Union



Source: FAO, based on Trade Data Monitor (TDM).

Policy developments affecting the meat sector in 2022

This review covers policy measures related to meat and meat products from 1 January to 31 December 2022.

Policy developments affecting production, domestic marketing and consumption

Production and income support policies

Several governments implemented policy measures supporting farmers and processors to cope with droughts, animal diseases, rising input costs or market disruptions.

- **Brazil,** in March 2022, established an interest payment subsidy, worth Brazilian real 1.2 billion (around USD 241 million) as a provisional measure to support livestock farmers in the southern regions affected by drought.

- **Dominican Republic,** in May 2022, allocated a budget of DOP 700 million (USD 12.6 million) to increase livestock productivity over three years by planting grass to increase the extent and improve pasture quality and insemination to advance livestock genetics.

- **India,** in December 2022, implemented the Livestock Health and Disease Control Programme across the country, aiming to reduce risks to animal health with prophylactic vaccinations against animal diseases; capacity building of veterinary services; disease surveillance and strengthening veterinary infrastructure.

- **European Union,** in March 2022, announced a package of measures against the impact of the war in Ukraine to enhance food security and support European Union farmers suffering from high costs of inputs such as energy and fertilizers. The plan provided EUR 500 million (around USD 551 million) in aid to assist farmers affected by market disruptions, input costs and trade restrictions. Other measures include storage assistance for pig meat, flexibility on animal feed imports and an advance on CAP payments.

- **Japan,** in September 2022, announced a JPY 3.5 billion (USD 24.4 million) relief package to alleviate rising food and energy costs. This measure included payments for livestock farmers to compensate for rising compound feed prices.

- **The Russian Federation,** in November 2022, allocated RUB 900 million (USD 14.9 million) as partial compensation to farmers in 22 regions to cover higher costs of production, sales and insurance.

- **Thailand,** in May 2022, approved new measures to import up to 1.2 million tonnes of animal feed ingredients, including maize, wheat and barley, to ease a shortage of animal feed.

- **The United States,** in March 2022, announced additional funding to expand meat processing capacity and launched the Meat and Poultry Processing Capacity Technical Assistance Programme. The program provided technical assistance to meat and poultry farmers through grants under the Meat and Poultry Inspection Readiness Grant (MPIRG) program and the Meat and Poultry Processing Expansion Programme. The United States Department of Agriculture (USDA) also announced its intention to accept applications for USD 23.6 million in competitive grant funding available through the MPIRG program.

Consumer-oriented policies

- **China** (mainland), in October 2022, released 20 000 tonnes of frozen pig meat from its state reserves to ease domestic pig meat price increases. Since early September the Chinese National Development Reform Commission has auctioned 127 100 tonnes of frozen pig meat to moderate domestic price increase.

- **Mexico,** in October 2022, announced a voluntary agreement with 16 private sector actors to lower prices for some basic food items, including meat.

- **Peru,** in May 2022, announced the adoption of Law No. 31452, exempting sales and imports of chicken meat, chicken eggs, sugar, pasta and bread from VAT (Value Added Tax) from 1 May to 31 July 2022.

- **Türkiye,** in May 2022, reduced VAT from 8 percent to 1 percent on various food products, including meat, effective from 14 February 2022.

Policy developments affecting international trade

Tariff and tariff rate quotas

- **Brazil,** in May 2022, lowered import tariffs on several categories of goods to reduce consumer inflation. Tariffs on boneless and frozen beef (HS code: 0202.30.00) have been reduced from 10.8 to 0 percent and edible parts of chickens, minced, offal and frozen (HS code: 0207.14) from 9 to 0 percent. In November 2021, Brazil reduced import duties on 8 225 products, including meat, until 31 December 2022 to contain the adverse effects of the COVID-19 pandemic. In May 2022, Brazil also reduced tariffs on bovine meat imports from 12 and 10 to 9.6 and 8 percent, depending on the cuts.

- **Colombia,** in April 2022, exempted import tariffs on 39 agricultural inputs, including animal feed, to reduce food production costs for one year. Colombia, in October 2022, increased import duties, from 125 to 156 percent, applicable to poultry meat to stabilize poultry meat prices.

- **Congo,** in October 2022, announced a temporary exemption of import duties for basic foods, including meat, for a period of one year, to contain food price increases.

- **The European Union,** in May 2022, approved a proposal for a one-year suspension of EU import duties on all Ukrainian products, including meat, aiming to support the country's economy.

- **The European Union,** in May 2022, granted a one-year suspension of import duties on meat products from Ukraine, together with the elimination of import tariff quota for 90 000 tonnes. A similar measure was applied in April 2022 by the United Kingdom.

- **Malaysia,** in May 2022, announced that an Approved Permit for import quotas and import permission is no longer required for certain agrifood commodities including chicken meat.

- **Mexico,** in May 2022, suspended import tariffs for one year on a wide range of food products, including meat and livestock.

- **The Philippines,** in May 2022, extended until 31 December 2022 import tariff reductions for pig meat, which remained at 15 percent in-quota from 30 percent, and at 25 percent out-of-quota from 40 percent previously. No changes were made to the minimum access volume for pig meat, which remained at 54 210 tonnes (February 2022 to January 2023).

- **The Philippines,** in December 2022, extended the reduced tariff rates on pig meat through 2023, with a dual tariff structure whereby a tariff rate of 15 percent is applicable for the quota amount and 25 percent for out-of-quota.

- **The Republic of Korea,** in July 2022, announced zero tariff on 100 000 tonnes of bovine meat imports and 82 500 tonnes of chicken meat until the end of 2023 to stabilize domestic prices. In June 2022 the Republic of Korea removed tariffs on 50 000 tonnes of pig meat imports.

- **The United Kingdom,** in March 2022, announced the agreement to allow tariff-free imports of all New Zealand agricultural food products. Tariffs will be eliminated after 10 years for beef and after 15 years for sheep meat.

- **The United Kingdom,** in April 2022, announced the removal of tariffs and quotas on all goods, including meat, from Ukraine under the UK–Ukraine Free Trade Agreement to support Ukraine's economy for 12 months.

- **Viet Nam,** in July 2022, lowered its most favoured nation tariff rate on frozen pig meat from 15 to 10 percent.

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.

- **China** (mainland), in January 2022, banned imports of pig meat from Italy and North Macedonia following ASF outbreaks.
- **Japan,** in January 2022, suspended pig meat imports from Italy due to concern over ASF.

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.

- **Botswana,** in October 2022, resumed exports of live cattle and beef, which were suspended in August, from areas declared free of foot and mouth disease (FMD).
- **The Philippines,** in March 2022, lifted a ban on bovine meat imports from the United Kingdom. The ban was put in place in October 2021 following the detection of a case of BSE.

Highly pathogenic avian influenza (HPAI)

Several countries announced HPAI-related measures during the reference period.

- **Cuba,** in July 2022, lifted a ban on poultry meat imports from Poland, which was previously imposed due to Highly Pathogenic Avian Influenza (HPAI) concerns.
- **The Republic of Korea,** in September 2022, removed import restrictions on pig and poultry meat imports from the European Union. The Republic of Korea agreed to recognize the EU's regionalization measures to control African Swine Fever (ASF) and HPAI outbreaks.
- **Qatar,** in September 2022, removed a ban on poultry meat imports from the United States, which was previously imposed on 1 June 2022 due to HPAI concerns.
- **Saudi Arabia,** in May 2022, banned imports of poultry meat from three French provinces, Landes, Pyrenees-Atlantiques and Gers because of HPAI outbreaks. Saudi Arabia had previously banned imports from the French region of Saint-Geours-de-Maremne for the same reason.
- **Saudi Arabia,** in July 2022, lifted a ban on poultry and egg products imports from the Wielkopolska province of Poland, which was imposed due to HPAI concerns.
- **The United States,** in February 2022, suspended exports of poultry meat from the state of Indiana after several countries, including Benin, China (mainland), Republic of Korea, Namibia, and South Africa, banned imports due to the detection of HPAI in a commercial turkey flock in Dubois County.

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.

- **China** (mainland), in March 2022, suspended bovine meat imports from a plant in central Brazil. Since the beginning of 2022, meat imports, including pig and poultry meat, have been banned from several other Brazilian plants.
- **China** (mainland), in July 2022, lifted a ban on five chicken meat export facilities in Thailand, which have adhered to Chinese protocols to prevent contamination from animal diseases. Several Thai chicken meat exporters have been suspended since mid-2021. With this approval, 20 of the 31 export facilities were able to export chicken meat to China.

- **China** (mainland), in July 2022, removed a ban on imports from three Canadian pig meat-processing facilities.

- **China** (mainland), in August 2022, suspended a pig meat facility in the United States of America, based in the State of Indiana. Two beef facilities from the United States of America had been temporarily banned previously, as the Chinese General Administration of Customs detected ractopamine in a shipment.

- **China** (mainland), in November 2022, suspended bovine meat imports from three US establishments after detecting ractopamine, a chemical substance that is banned in China, in some consignments.

- **China** (mainland), in December 2022, published announcement No. 131 of 2022, changing COVID-19 controls and management and ending the requirement for testing and disinfection measures; this is expected to reduce clearance time and costs of exports.

- **Kuwait,** in September 2022, lifted a ban on all non-heat-treated poultry meat (fresh, chilled, frozen, and processed) from 24 US states adopting a regionalization model. At the same time, Kuwait banned poultry meat imports from specific regions in the Czech Republic, France, Spain and Portugal.

- **Pakistan,** in August 2022, amended the statutory Regulatory Order issued on 30 June 2022, modifying the list of prohibited import products, including processed food and meat products.

- **The Philippines,** in January 2022, extended the validity of SPS (Sanitary and Phytosanitary) import clearance for red and poultry meat from 60 to 90 days through 31 December 2022, in response to the global shipping situation and logistical difficulties brought about by the global COVID-19 pandemic.

- **The Republic of Korea,** in December 2022, lifted a ban on processed pig meat (bacon, ham and sausages) imports from the United Kingdom.

- **The Russian Federation,** in September 2022, suspended beef imports from four large slaughterhouses in Paraguay. The suspended plants represented more than half of all the beef sent from Paraguay to the Russian Federation.

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. Market access restrictions were also imposed as retaliatory measures by some countries. Meanwhile, several countries opened their markets to foreign meat products.

- **Belarus,** in January 2022, imposed an import ban for six months on some food imports, including meat, from Western countries to retaliate against the sanctions imposed against the country. Affected countries include Albania, Canada, the European Union, Iceland, Montenegro, North Macedonia, Norway, Switzerland, the United Kingdom and the United States. Belarus expanded the list of countries subject to the import ban imposed on 1 January 2022 to include Liechtenstein and Serbia in January 2022.

- **Canada,** in March 2022, opened its market to bovine and pig meat from Brazil. Canada, in June 2022, approved imports from two Brazilian pig meat plants. A week earlier, another Brazilian plant was authorized to export to Canada. With the new authorizations, Brazil now has five production units authorized to export pig meat to the Canadian market.

- **Chile,** in March 2022, allowed imports of pig meat from the United Kingdom.

- **China** (mainland), in February 2022, updated the list of bovine meat products available for import from Chile, including frozen or chilled deboned or bone-in ovine skeletal muscles along with cattle by-products.

- **The European Union,** in June 2022, authorized poultry meat imports from Morocco under the condition that all products supplied must have been treated at a minimum temperature of 70 °C as a risk-mitigating measure.

- **India,** in January 2022, allowed pig meat imports from the United States.

- **Indonesia,** in July 2022, started exporting chicken meat to Singapore. This aimed to reduce the shortage in Singapore following a temporary halt of a key supplier of live chicken exports because Malaysia temporarily banned such exports to prevent domestic shortages and price increases.

- **The Islamic Republic of Iran,** in August 2022, lifted a ban on non-reproductive livestock exports as some provinces faced fodder shortages resulting from drought conditions.

- **The Islamic Republic of Iran,** in November 2022, allowed imports of poultry meat from the Russian Federation.

- **Malaysia,** in November 2022, granted market access to pig meat imports from Ireland.

- **Malaysia,** in November 2022, agreed to open its market to Brazilian pig meat imports originating from swine that were born, raised and slaughtered in the region of Santa Catarina.

- **Mexico,** in June 2022, received authorization to export meat to Cuba from 30 meat establishments, of which 16 are new authorizations, while 14 are renewals.

- **The Russian Federation,** in May 2022, agreed to allow imports of rendered animal meals from Brazil as part of an effort to find new suppliers of raw materials for animal feed.

- **Saudi Arabia,** in March 2022, lifted a ban on chicken and egg imports from Thailand, which had been in place since 2004.

- **South Africa,** in August 2022, announced a decision to suspend the imposition of anti-dumping duties, imposed in January 2022, on poultry imports from Brazil, Denmark, Ireland, Poland, and Spain for a period of twelve months as part of measures to ease food inflation. The duties remain for Germany, Netherlands, the United Kingdom of Great Britain and Northern Ireland and the United States of America.

- **Singapore,** in September 2022, authorized imports from three Argentinian pig meat packing plants.

- **The United Kingdom,** in April 2022, announced the delay of the implementation of further controls on imports from the European Union, which were due to be introduced on meat on 1 July 2022.

Export restrictions

- **Malaysia,** in October 2022, relaxed a ban on live poultry exports, which was temporarily imposed from 1 June 2022 to prevent shortages and contain price rise.

- **Türkiye,** in March 2022, added bovine and ovine meat to a list of export products that the Ministry of Agriculture and Forestry has the authority to restrict, aiming to stabilize local market conditions and domestic prices. Poultry meat was previously added to the list on 27 January 2022. Moreover, to protect domestic producers, tariff rates on meat imports increased for 2022.

- **Ukraine,** in March 2022, introduced export licenses for its key agriculture commodities, including poultry meat, and suspended exports of several agricultural commodities, including some meat and livestock products, following the invasion of the Russian Federation.

Trade agreements

- **Australia,** in April 2022, concluded an Economic Cooperation and Trade Agreement with India. The agreement removes tariffs on more than 85 percent of the Australian goods exported to India, including sheep meat, rising to almost 91 percent over ten years. In return, 96 percent of Indian goods imports enter Australia duty-free.

- **The European Union,** in December 2022, reached a deal with Chile aiming to deepen their existing trade agreement. Under the deal, the European Union will provide additional market access in the form of duty-free quotas to Chile, including an additional import quota for 9 000 tonnes of poultry meat with provisions to increase the quota by another 9 000 tonnes after three years. It will also add duty-free quotas for 2 000 tonnes of bovine meat, 4 000 tonnes of sheep meat and 9 000 tonnes of pig meat for import into the European Union.

- **Japan,** in March 2022, reached an agreement with the United States to implement a new three-trigger safeguard mechanism instead of the one trigger applicable previously under the US–Japan Trade Agreement.

- **Japan,** in June 2022, signed a new agreement with the United States of America, to revise the safeguard mechanism included in the 2019 US–Japan trade deal to set stricter limits on when Japan may impose higher duties on US beef. Under the updated mechanism, three conditions must be met before safeguard duties can be imposed in the future: annual beef imports from the United States of America must exceed the original beef safeguard trigger volume levels set under the US–Japan deal; the combined volume of annual beef imports from the United States of America, and the original signatories of Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), must exceed the CPTPP beef safeguard trigger level; annual beef imports from the United States of America must exceed the total amount of the previous year. This third trigger will be in effect until 2027.

- **Malaysia,** in September 2022, ratified the CPTPP becoming the ninth out of eleven countries to ratify the agreement, which includes several meat import tariff reductions.

Appendix tables statistics

Total meat statistics	Production		Imports		Exports		Utilization	
	2021	2022	2021	2022	2021	2022	2021	2022
		estim.		*estim.*		*estim.*		*estim.*
ASIA	**151 166**	**156 550**	**23 025**	**21 889**	**5 119**	**5 555**	**169 046**	**172 745**
China	91 370	94 701	10 510	8 217	869	1 008	101 010	101 910
India	9 054	9 266	2	2	1 350	1 394	7 705	7 873
Indonesia	4 541	5 157	274	298	5	5	4 810	5 450
Iran (Islamic Republic of)	2 621	2 582	100	174	41	21	2 680	2 735
Japan	4 237	4 219	3 571	3 695	21	18	7 800	7 819
Malaysia	1 889	1 828	356	537	81	83	2 164	2 282
Pakistan	4 959	5 226	1	1	78	79	4 883	5 148
Philippines	2 770	2 890	944	1 189	9	9	3 675	4 035
Republic of Korea	2 725	2 752	1 399	1 590	61	82	4 088	4 203
Saudi Arabia	1 222	1 234	854	863	61	69	2 015	2 027
Thailand	4 774	4 799	39	48	1 348	1 477	3 431	3 400
Türkiye	4 257	4 664	46	69	729	831	3 575	3 903
Viet Nam	4 945	5 412	760	679	26	26	5 679	6 065
AFRICA	**21 880**	**21 649**	**3 164**	**3 106**	**293**	**297**	**24 751**	**24 459**
Algeria	777	778	10	4	-	-	787	782
Angola	320	325	351	459	-	-	671	784
Egypt	2 994	2 781	256	238	2	2	3 248	3 017
Nigeria	1 473	1 471	10	8	-	-	1 483	1 479
South Africa	3 507	3 529	474	409	147	143	3 833	3 796
CENTRAL AMERICA & THE CARIBBEAN	**10 934**	**11 120**	**3 933**	**4 017**	**1 002**	**996**	**13 865**	**14 140**
Cuba	235	232	376	366	-	-	611	598
Mexico	7 692	7 890	2 494	2 583	714	736	9 472	9 737
SOUTH AMERICA	**47 106**	**48 766**	**1 609**	**1 477**	**10 916**	**11 731**	**37 798**	**38 515**
Argentina	6 108	6 316	69	71	1 007	1 074	5 170	5 314
Brazil	30 031	31 208	71	81	8 353	9 152	21 749	22 137
Chile	1 568	1 556	821	644	471	455	1 919	1 744
Colombia	2 932	3 065	268	261	69	52	3 132	3 274
Uruguay	795	747	105	116	563	515	337	350
NORTH AMERICA	**54 044**	**54 395**	**3 234**	**3 410**	**10 861**	**10 557**	**46 480**	**47 132**
Canada	5 202	5 246	772	756	2 275	2 168	3 673	3 846
United States of America	48 842	49 149	2 454	2 647	8 585	8 389	42 799	43 279
EUROPE	**65 058**	**63 398**	**5 078**	**5 574**	**10 964**	**9 833**	**59 176**	**59 137**
Belarus	1 250	1 223	91	95	484	432	857	885
European Union	44 524	42 783	1 323	1 526	8 364	7 337	37 482	36 973
Russian Federation	10 876	11 227	623	567	647	706	10 857	11 083
Ukraine	2 439	2 185	195	157	511	449	2 124	1 892
United Kingdom of Great Britain and Northern Ireland	4 220	4 214	2 256	2 637	854	801	5 622	6 050
OCEANIA	**6 459**	**6 479**	**517**	**552**	**2 891**	**2 804**	**4 085**	**4 257**
Australia	4 388	4 442	239	272	1 788	1 765	2 840	2 953
New Zealand	1 489	1 450	91	83	1 099	1 036	481	522
WORLD	**356 648**	**362 357**	**40 559**	**40 025**	**42 045**	**41 773**	**355 202**	**360 384**
LIFDC	14 162	14 084	1 680	1 651	245	230	15 596	15 505
LDC	12 914	12 928	1 708	1 756	64	62	14 558	14 621

Note: Total meat includes bovine, ovine, pig, poultry and other meats, all expressed in carcass weight equivalents.

Poultry meat statistics	Production		Imports		Exports		Utilization	
	2021	2022	2021	2022	2021	2022	2021	2022
		estim.		*estim.*		*estim.*		*estim.*
ASIA	**53 182**	**54 930**	**7 598**	**7 937**	**3 034**	**3 391**	**57 708**	**59 501**
China	24 618	25 238	1 820	1 634	678	793	25 759	26 080
India	3 714	3 776	-	-	4	5	3 711	3 771
Indonesia	3 661	4 254	-	-	2	2	3 659	4 251
Iran (Islamic Republic of)	1 994	1 923	70	108	33	16	2 031	2 014
Japan	2 436	2 429	1 316	1 359	6	5	3 747	3 784
Kuwait	65	67	163	174	7	7	221	234
Malaysia	1 625	1 566	97	177	63	62	1 659	1 680
Republic of Korea	1 010	999	198	242	45	68	1 158	1 168
Saudi Arabia	930	930	632	615	47	54	1 515	1 491
Thailand	1 845	1 891	2	2	1 196	1 340	617	583
Türkiye	2 305	2 472	41	63	666	763	1 679	1 772
AFRICA	**7 620**	**7 444**	**2 398**	**2 322**	**124**	**131**	**9 893**	**9 635**
Angola	40	40	246	329	-	-	286	369
South Africa	1 910	1 951	433	373	56	59	2 287	2 265
CENTRAL AMERICA & THE CARIBBEAN	**5 615**	**5 772**	**2 014**	**1 927**	**36**	**45**	**7 593**	**7 654**
Cuba	24	25	355	343	-	-	379	367
Mexico	3 687	3 801	1 092	1 046	10	19	4 769	4 828
SOUTH AMERICA	**23 364**	**23 947**	**466**	**434**	**4 810**	**5 030**	**19 021**	**19 351**
Argentina	2 295	2 319	11	15	216	227	2 090	2 107
Brazil	15 216	15 505	5	5	4 407	4 598	10 814	10 912
Chile	752	769	187	172	178	193	762	748
NORTH AMERICA	**24 682**	**25 180**	**387**	**442**	**4 088**	**4 154**	**21 038**	**21 382**
Canada	1 494	1 531	210	215	183	162	1 520	1 585
United States of America	23 188	23 649	173	223	3 905	3 993	19 514	19 793
EUROPE	**22 257**	**22 083**	**2 066**	**2 313**	**3 609**	**3 345**	**20 719**	**21 047**
European Union	13 292	13 063	600	667	2 180	2 027	11 712	11 702
Russian Federation	4 617	4 816	256	209	338	380	4 541	4 640
Ukraine	1 375	1 251	128	80	464	426	1 038	905
United Kingdom of Great Britain and Northern Ireland	1 987	1 948	838	1 114	384	294	2 441	2 769
OCEANIA	**1 614**	**1 636**	**123**	**125**	**81**	**88**	**1 656**	**1 674**
Australia	1 348	1 375	3	5	51	59	1 300	1 322
New Zealand	228	223	1	2	29	29	200	195
WORLD	**138 333**	**140 993**	**15 052**	**15 500**	**15 781**	**16 185**	**137 628**	**140 244**
LIFDC	2 524	2 510	1 367	1 281	14	16	3 878	3 775
LDC	2 886	2 890	1 380	1 376	22	22	4 243	4 244

Pig meat statistics	Production		Imports		Exports		Utilization	
	2021	2022	2021	2022	2021	2022	2021	2022
		estim.		*estim.*		*estim.*		*estim.*
ASIA	**63 096**	**65 660**	**7 684**	**5 719**	**263**	**257**	**70 542**	**70 987**
China	53 907	56 360	4 768	2 470	125	129	58 550	58 701
India	320	316	1	1	2	1	319	316
Indonesia	261	263	4	7	-	-	265	270
Japan	1 318	1 293	1 424	1 528	4	3	2 764	2 771
Malaysia	219	217	23	47	3	2	239	262
Philippines	1 188	1 217	332	496	2	2	1 487	1 675
Republic of Korea	1 407	1 419	579	721	11	9	2 006	2 079
Thailand	928	746	1	1	44	30	884	717
Viet Nam	2 590	2 880	241	127	18	21	2 813	2 986
AFRICA	**2 015**	**2 025**	**317**	**335**	**33**	**30**	**2 299**	**2 330**
Madagascar	19	17	-	-	-	-	19	17
Nigeria	310	307	8	6	-	-	317	313
South Africa	321	352	34	30	27	24	327	358
Uganda	128	129	1	-	-	-	129	130
CENTRAL AMERICA & THE CARIBBEAN	**2 132**	**2 139**	**1 521**	**1 703**	**354**	**324**	**3 299**	**3 518**
Cuba	124	119	16	21	-	-	141	140
Mexico	1 693	1 730	1 191	1 334	333	305	2 551	2 759
SOUTH AMERICA	**7 282**	**7 734**	**508**	**485**	**1 745**	**1 705**	**6 045**	**6 514**
Argentina	696	723	50	49	20	1	726	771
Brazil	4 899	5 186	3	3	1 452	1 471	3 451	3 718
Chile	589	576	189	136	267	229	510	483
Colombia	461	517	152	166	-	-	613	683
NORTH AMERICA	**14 846**	**14 515**	**948**	**1 019**	**4 537**	**4 155**	**11 244**	**11 363**
Canada	2 286	2 263	298	269	1 497	1 427	1 063	1 115
United States of America	12 560	12 252	649	748	3 040	2 727	10 179	10 246
EUROPE	**30 864**	**29 635**	**1 282**	**1 423**	**5 755**	**4 949**	**26 391**	**26 109**
Belarus	393	364	48	60	43	38	398	387
European Union	23 616	22 274	104	129	5 205	4 388	18 516	18 015
Russian Federation	4 304	4 522	44	50	206	222	4 142	4 350
Serbia	312	304	57	75	19	18	351	362
Ukraine	724	642	57	67	8	2	773	708
United Kingdom of Great Britain and Northern Ireland	1 037	1 043	828	903	259	264	1 606	1 681
OCEANIA	**591**	**585**	**305**	**326**	**42**	**39**	**854**	**872**
Australia	443	436	211	242	40	36	615	642
Papua New Guinea	83	84	6	5	-	-	89	89
WORLD	**120 826**	**122 293**	**12 565**	**11 008**	**12 728**	**11 459**	**120 675**	**121 692**
LIFDC	1 484	1 455	169	187	3	4	1 650	1 638
LDC	1 960	1 942	194	227	1	2	2 152	2 167

Bovine meat statistics	Production		Imports		Exports		Utilization	
	2021	2022	2021	2022	2021	2022	2021	2022
		estim.		*estim.*		*estim.*		*estim.*
ASIA	**21 297**	**22 100**	**7 022**	**7 516**	**1 705**	**1 779**	**26 601**	**27 807**
China	6 990	7 195	3 455	3 718	56	64	10 390	10 849
India	4 195	4 350	-	-	1 336	1 378	2 859	2 972
Indonesia	507	520	269	288	1	1	775	807
Iran (Islamic Republic of)	343	362	29	64	8	5	363	421
Japan	478	492	804	777	11	11	1 258	1 228
Malaysia	41	41	207	271	14	18	234	293
Pakistan	2 374	2 455	1	1	67	74	2 308	2 382
Philippines	183	183	203	237	5	5	381	415
Republic of Korea	304	330	598	595	6	4	896	920
AFRICA	**7 039**	**6 965**	**427**	**425**	**87**	**81**	**7 380**	**7 309**
Algeria	142	140	10	4	-	-	152	144
Angola	109	109	13	17	-	-	122	126
Egypt	519	533	228	201	1	1	747	733
South Africa	1 053	1 008	5	4	58	53	1 001	959
CENTRAL AMERICA & THE CARIBBEAN	**2 955**	**2 976**	**380**	**369**	**610**	**624**	**2 726**	**2 721**
Mexico	2 131	2 176	207	200	368	409	1 970	1 967
SOUTH AMERICA	**15 965**	**16 579**	**631**	**553**	**4 135**	**4 768**	**12 461**	**12 364**
Argentina	2 982	3 133	7	7	750	825	2 239	2 315
Brazil	9 750	10 350	59	70	2 327	2 907	7 482	7 513
Chile	209	190	445	335	20	27	634	498
Colombia	767	718	9	10	68	52	708	676
Uruguay	668	616	41	44	532	489	178	171
NORTH AMERICA	**14 117**	**14 303**	**1 696**	**1 741**	**2 217**	**2 229**	**13 615**	**13 794**
Canada	1 383	1 412	237	239	589	574	1 030	1 077
United States of America	12 734	12 890	1 457	1 501	1 629	1 655	12 583	12 715
EUROPE	**10 486**	**10 242**	**1 295**	**1 367**	**1 439**	**1 377**	**10 341**	**10 232**
European Union	6 882	6 722	310	385	902	851	6 291	6 256
Russian Federation	1 674	1 614	317	302	103	102	1 888	1 814
Ukraine	311	270	10	9	39	21	282	257
United Kingdom of Great Britain and Northern Ireland	906	925	485	514	139	164	1 253	1 275
OCEANIA	**2 664**	**2 621**	**61**	**65**	**1 895**	**1 807**	**830**	**879**
Australia	1 895	1 878	22	22	1 238	1 188	679	712
New Zealand	754	728	11	12	655	616	111	123
WORLD	**74 523**	**75 785**	**11 513**	**12 036**	**12 089**	**12 665**	**73 953**	**75 105**
LIFDC	6 064	6 028	136	166	186	163	6 014	6 031
LDC	4 653	4 666	124	141	14	10	4 763	4 797

Ovine meat statistics	Production		Imports		Exports		Utilization	
	2021	2022	2021	2022	2021	2022	2021	2022
		estim.		*estim.*		*estim.*		*estim.*
ASIA	**10 057**	**10 338**	**665**	**670**	**23**	**36**	**10 699**	**10 972**
Bangladesh	235	237	-	-	-	-	235	237
China	5 143	5 252	438	380	2	2	5 579	5 631
India	824	823	0	0	8	9	816	814
Iran (Islamic Republic of)	277	289	0	3	-	-	277	292
Pakistan	765	782	0	0	4	4	761	778
Saudi Arabia	143	145	23	30	0	0	166	175
Türkiye	480	605	0	1	1	5	480	601
AFRICA	**3 443**	**3 429**	**9**	**12**	**44**	**51**	**3 408**	**3 390**
Algeria	361	364	-	-	-	-	361	364
Nigeria	409	408	0	0	-	-	409	408
South Africa	168	161	2	2	3	4	167	159
CENTRAL AMERICA & THE CARIBBEAN	**144**	**146**	**10**	**12**	**2**	**3**	**152**	**155**
Mexico	106	108	1	0	2	3	106	106
SOUTH AMERICA	**332**	**334**	**3**	**4**	**33**	**27**	**301**	**314**
Brazil	141	141	3	4	0	0	144	145
NORTH AMERICA	**90**	**87**	**191**	**196**	**3**	**3**	**279**	**285**
United States of America	74	70	166	165	2	3	238	237
EUROPE	**1 191**	**1 183**	**168**	**202**	**115**	**119**	**1 243**	**1 268**
European Union	579	575	113	139	37	36	655	678
Russian Federation	215	211	0	0	0	1	215	210
United Kingdom of Great Britain and Northern Ireland	283	291	47	56	70	75	260	272
OCEANIA	**1 128**	**1 175**	**27**	**35**	**853**	**853**	**302**	**386**
Australia	684	735	2	1	455	478	230	264
New Zealand	444	439	3	3	398	375	50	92
WORLD	**16 386**	**16 692**	**1 072**	**1 131**	**1 072**	**1 093**	**16 384**	**16 771**
LIFDC	2 858	2 848	2	11	41	46	2 819	2 813
LDC	2 569	2 575	2	2	26	27	2 545	2 550

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)										
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
2022	5 795	8 853	5 905	5 616	5 151	2 852	2 363	1 979	1 338	1 985
Monthly										
2022 – January	6 265	9 717	5 178	5 763	5 761	2 541	2 217	1 464	1 283	1 704
2022 – February	6 472	9 575	5 591	5 588	5 558	2 618	2 152	1 550	1 253	1 719
2022 – March	6 500	9 548	5 900	5 667	5 719	2 656	2 143	2 098	1 265	1 805
2022 – April	6 332	9 387	6 209	5 547	5 742	2 730	2 219	2 193	1 313	1 921
2022 – May	6 133	9 102	6 452	5 354	5 499	2 874	2 392	2 000	1 354	2 070
2022 – June	5 907	9 043	6 825	5 560	5 439	2 953	2 430	2 008	1 507	2 180
2022 – July	5 660	8 761	6 549	5 657	5 159	3 061	2 381	1 961	1 472	2 192
2022 – August	5 494	8 622	6 133	5 844	4 824	2 976	2 386	2 071	1 466	2 074
2022 – September	5 401	8 497	6 001	5 643	4 612	3 036	2 451	2 142	1 406	2 057
2022 – October	5 301	8 165	5 847	5 389	4 412	2 982	2 473	2 005	1 306	2 057
2022 – November	5 180	8 038	5 227	5 493	4 447	2 976	2 558	2 053	1 234	2 041
2022 – December	4 892	7 779	4 951	5 880	4 644	2 820	2 555	2 208	1 202	2 000

	FAO indices				
	Total meat	Poultry meat	Pig meat	Bovine meat	Ovine meat
Period	*(...2014-2016=100...)*				
Annual (Jan/Dec)					
2012	105	115	111	93	111
2013	106	118	113	93	101
2014	112	114	117	107	114
2015	97	96	92	102	94
2016	91	90	92	91	92
2017	98	98	98	96	112
2018	95	93	91	96	124
2019	100	96	98	101	124
2020	96	87	94	100	117
2021	108	102	94	118	141
2022	119	122	102	128	131
Monthly					
2022 – January	112	108	86	133	140
2022 – February	114	108	89	136	136
2022 – March	119	112	100	138	139
2022 – April	122	118	104	137	137
2022 – May	123	126	103	136	132
2022 – June	126	135	105	136	134
2022 – July	124	134	106	131	132
2022 – August	121	129	106	126	130
2022 – September	120	127	109	124	125
2022 – October	117	124	106	121	119
2022 – November	115	122	107	115	121
2022 – December	112	119	107	110	128

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.

CONTACT

Meat Market Review

Meat-Moderator@fao.org

Markets and Trade Division - Economic and Social Development Stream

www.fao.org/markets-and-trade

Food and Agriculture Organization of the United Nations
Rome, Italy

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