MEAT AND MEAT PRODUCTS

World meat production is anticipated to record a modest expansion in 2015 to 318.7 million tonnes, 1.3 percent, or 4 million tonnes, above 2014, with the largest increases expected in China, the EU, United States and Brazil. The pigmeat sector is forecast to drive the global increase, followed by poultry. Only modest gains in bovine and sheepmeat production are currently foreseen.

Global meat trade is forecast to expand at a moderate rate of 1.7 percent in 2015, to 31.2 million tonnes, a significant slowdown from the 3.1 percent registered last year. There are diverging projected trade trends for the various types of meat, with growth forecast for bovine, pigmeat and poultry, and decline forecast for ovine meat. Poultry remains the main traded meat product, followed by bovine, pig and ovine meat, respectively.

Trade in poultry is forecast to grow at a limited pace, increasing by 2.6 percent to 13.1 million tonnes in 2015. Augmented production in importing countries continues to reduce their need for external poultry supplies. Additionally, outbreaks of highly pathogenic avian influenza (HPAI) in some areas of the United States from January onwards caused numerous countries to suspend imports either from the country as a whole or from affected states within the country, pending its containment and eradication. Bovine meat trade is also anticipated to expand at a limited rate, rising by 1.9 percent to 9.8 million tonnes. Supply limitations are forecast to be the principal factor behind restricted growth, although the pace of the increase in import demand may slacken as well. Meanwhile, trade in pigmeat is expected to recover by 1.6 percent to 7.1 million tonnes in 2015, following decreases in the previous two years. Expanding production in the main exporting countries is anticipated to be the main driver of growth, although trade restrictions imposed by the Russian Federation will continue to impinge on the market. Finally, trade in ovine meat may drop by 8.5 percent to 940 000 tonnes, as a result of production short-falls in Australia and New Zealand due to flock rebuilding in both countries.

The FAO Meat Price Index was generally lower during the first four months of 2015, declining from 183 points in January to 178 points in April. The price fall affected all categories of meat.

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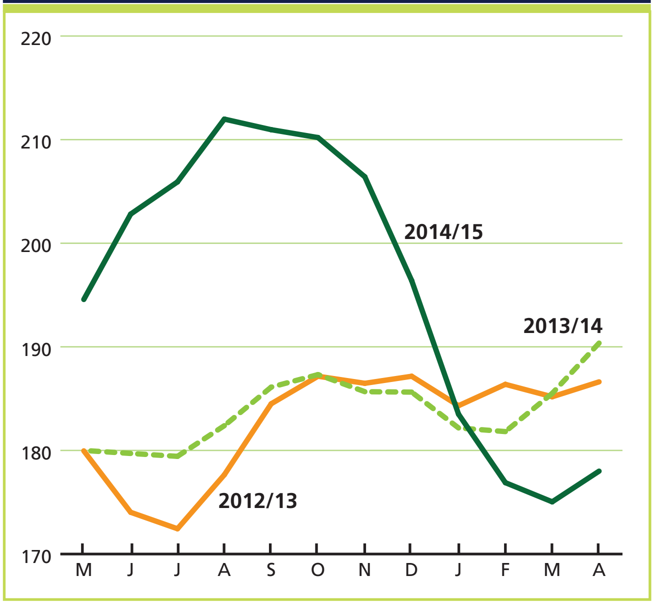
FAO INTERNATIONAL MEAT PRICE INDEX (2002-2004 = 100)



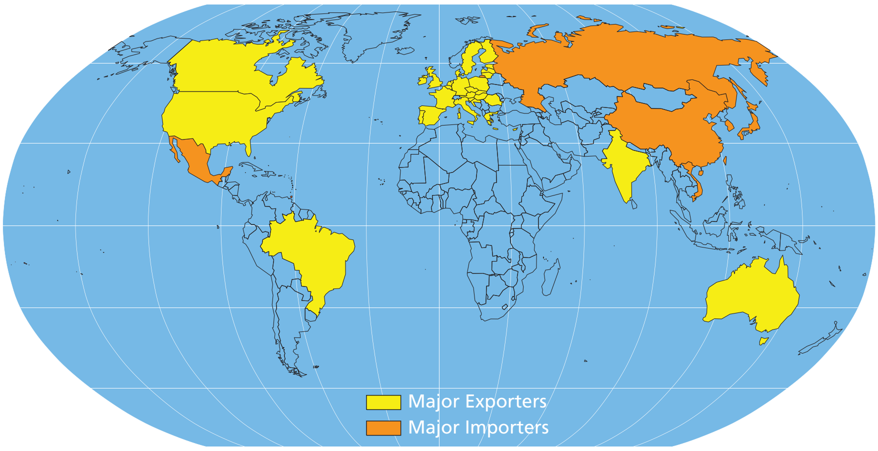
WORLD MEAT MARKET AT A GLANCE

	2013	2014 *estim.*	2015 *f'cast*	Change: 2015 over 2014
	million tonnes			%
WORLD BALANCE				
Production	**311.1**	**314.7**	**318.7**	**1.3**
Bovine meat	67.8	67.8	67.9	0.2
Poultry meat	108.6	110.2	111.8	1.4
Pigmeat	115.0	117.2	119.4	1.9
Ovine meat	13.9	13.9	14.0	0.8
Trade	**29.7**	**30.6**	**31.2**	**1.7**
Bovine meat	8.9	9.6	9.8	1.9
Poultry meat	12.5	12.7	13.1	2.6
Pigmeat	7.1	7.0	7.1	1.6
Ovine meat	1.0	1.0	0.9	-8.5
SUPPLY AND DEMAND INDICATORS				
Per caput food consumption:				
World (kg/yr)	43.4	43.3	43.4	0.1

FAO MEAT PRICE INDEX (2002-2004=100)	**2013**	**2014**	**2015** *Jan-Apr*	**Change: Jan-Apr 2015 over Jan-Apr 2014 %**
	184	198	178	-3.6

MEAT AND MEAT PRODUCTS

Major Meat Exporters and Importers



The **FAO Meat Price Index** was generally lower during the first four months of 2015, declining from 183 points in January to 178 points in April. The price fall affected all categories of meat.

Limited production growth; muted trade

World meat production is anticipated to record a modest expansion in 2015 to 318.7 million tonnes, 1.3 percent, or 4 million tonnes, above 2014, with the largest increases expected in China, the EU, United States and Brazil. The pigmeat sector is forecast to drive the global increase, followed by poultry meat. Only modest gains in bovine and ovine meat production are currently foreseen.

Global meat trade is forecast to expand at a moderate rate of 1.7 percent in 2015, to 31.2 million tonnes, a significant slowdown from the 3.1 percent registered last year. There are diverging projected trade trends for the various types of meat, with growth forecast for bovine meat, pigmeat and poultry, and decline forecast for ovine meat. Poultry remains the main traded meat product, followed by bovine, pig and ovine meat, respectively.

BOVINE MEAT

Unchanged production

Bovine meat production in 2015 is forecast to remain largely unchanged at 68 million tonnes – continuing a trend of limited growth evident for several years.

Figure 1. Prices fall on reduced demand (2002-2004=100)

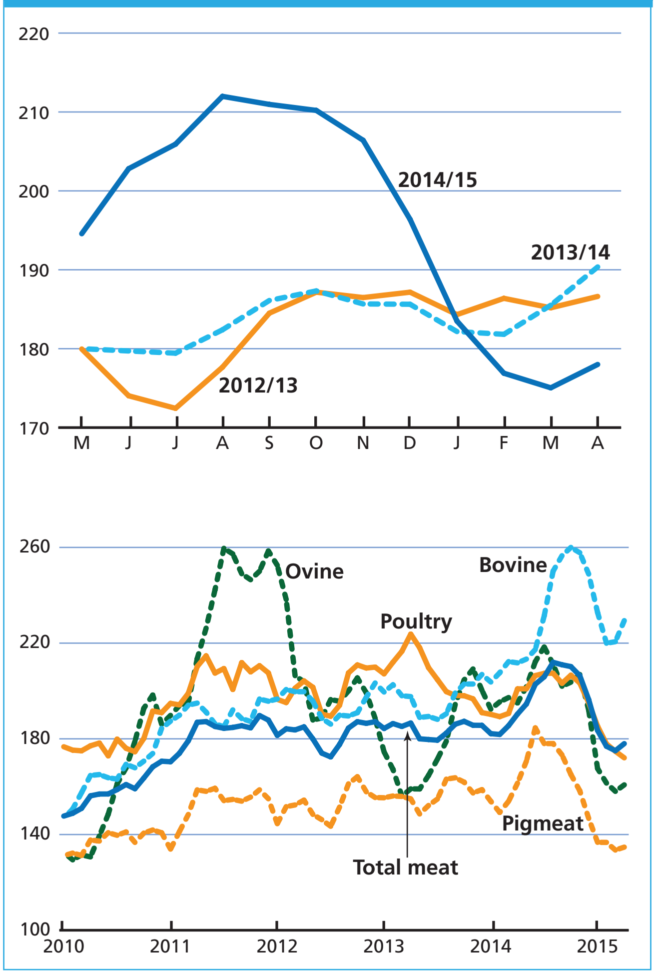


Table 1. World meat market at a glance

	2013	2014 *estim.*	2015 *f'cast*	Change: 2015 over 2014
	million tonnes			%
WORLD BALANCE				
Production	**311.1**	**314.7**	**318.7**	**1.3**
Bovine meat	67.8	67.8	67.9	0.2
Poultry meat	108.6	110.2	111.8	1.4
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FAO MEAT PRICE INDEX (2002-2004=100)	2013	2014	2015 *Jan-Apr*	Change: Jan-Apr 2015 over Jan-Apr 2014 %
	184	198	178	-3.6

In *South America*, cattle availabilities and slaughter have been rising, particularly in **Brazil**. The country, which is the second largest producer after the United States, is anticipated to account for most of the regional growth, as its production is projected to rise by 1.6 percent to 10 million tonnes. The Brazilian cattle herd is in an expansion phase, supported by improvements in productivity and genetics. Additionally, favourable prices on the export market have stimulated the use of feed to maintain cattle weight during the dry season. In **Argentina**, government export restrictions have obliged the industry to focus increasingly on internal demand, which absorbs over 90 percent of output. Preference for younger, lighter animals for the domestic market means that production is growing at a relatively slow rate. In neighbouring **Paraguay** and **Uruguay**, strong production growth is anticipated, spurred by international demand and sustained cattle prices, and supported by an expanding herd and productivity increases.

In *Asia*, **India**, the sixth largest bovine meat producer, continues to see its industry grow, supported by a government programme to utilize male buffalo calves from the country's expanding dairy herd. Output is forecast to drop in the **Republic of Korea**, where low profitability has led to herd reduction. In **China**, production is anticipated to record a second year of decline, due to a reduction in the size of the national herd. Limitations on space and fodder supplies, combined with poor profitability, have led to a number of smaller-scale producers leaving the industry.

Most parts of *Africa* received adequate rainfall during the first part of the year, which led to satisfactory pasture conditions and laid the basis for an anticipated moderate increase in bovine meat production. However, some areas of southern Africa suffered from flooding at the start of the year, followed more recently by dry conditions, which may affect both pastures and feed availability. As a consequence, the sector growth may be constrained in the subregion. Furthermore, outbreaks of foot-and-mouth disease in east-central Africa including **Kenya**, **Uganda** and **Rwanda** may depress yields. **Egypt**, where bovine meat production is mainly based on dairy cattle (including buffaloes), the continued presence of FMD and a high calf slaughter rate are anticipated to depress output.

In *North America*, the **United States**, the world's largest producer, is anticipated to incur a further, although smaller, decline in bovine meat production in 2015, as a result of calves being retained for herd expansion. This should be only partly offset by higher average slaughter weights, fostered by cheaper feed costs. Output could decline by 2.3 percent, to 10.9 million tonnes, its lowest level since 1994. The long-term decline in the cattle herd in neighbouring **Canada**, evident since 1992, is expected to continue.

In *Oceania*, the after-effects of drought are anticipated to impinge on production. In **Australia**, slaughter rates increased markedly in 2013 and the first part of 2014, prompted by reduced availability of pasture and fodder. Diminished herd size and rebuilding should combine to curb output in 2015, with a decline of 7.1 percent to 2.3 million tonnes anticipated. In **New Zealand**, production is foreseen to be higher – at around 590 000 tonnes – as a result of drought during the first part of the year and substantially lower milk payouts to farmers. The beef industry in New Zealand is highly dependent on the dairy sector, which provides 80 percent of the total supply in the form of culled cows and male calves for fattening. In the **Russian Federation**, improved productivity and slaughtering facilities may be sufficient to counterbalance long-term herd reduction, resulting in a small increase in output overall. In the **EU**, the world's third largest beef producer at 7.8 million tonnes, the prolonged reduction in the cattle herd has reversed as a result of dairy sector expansion. Bovine meat production is anticipated to rise by 1.7 percent in 2015, mainly owing to a rise in the number of male dairy calves for fattening and the culling of dairy cows in some countries, stemming from lower milk prices.

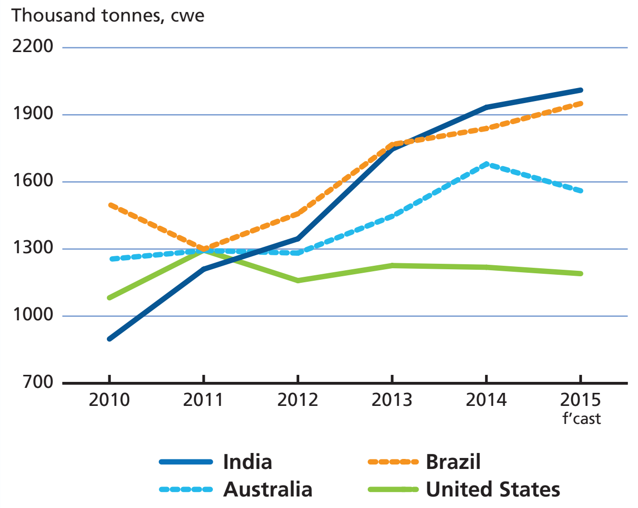
Limited trade growth

World trade in bovine meat in 2015 is anticipated to expand at a reduced rate of 1.9 percent, to 9.8 million tonnes. Supply limitations are forecast to be the principal factor behind the slowdown, although, the pace of growth in import demand may slacken as well.

China is expected to record a significant increase in imports, although not to the same degree as in the previous three years, when they tripled. Total imports could reach 1.3 million tonnes in 2015, 12.7 percent more than in 2014, placing China above the United States as the main world market for bovine meat. Changing consumption patterns, associated with increased income and growth in meals outside the home, have underpinned the substantial hike in imports China has experienced since 2011. Additionally, following outbreaks of avian influenza, some Chinese consumers have switched from poultry to other meats. Elsewhere in *Asia*, imports by **Vietnam**, the **Islamic Republic of Iran**, the **Republic of Korea** and **Malaysia** could increase, as domestic production is forecast to be either stable or decrease, while purchases by **Japan** may fall. Imports by the **United States** and **Canada** may also decline somewhat. In the **Russian Federation**, the devaluation of the rouble, combined with increased domestic production, are expected to result in a fall in purchases. Deliveries to the **EU**, **Chile** and **Mexico** are anticipated to be little changed.

Much of the 2015 expected expansion in trade is projected to be met by India and Brazil. **India**, in particular, is anticipated to see a strong rise in sales of buffalo meat (carabeef), which grew by 11 percent in 2014 and has almost quadrupled since 2009. India's exports in 2015 are projected at 2 million tonnes, confirming its position as the leading supplier of bovine meat, having overtaken Brazil already last year. India's main markets are in Asia – particularly **Vietnam** – and in North Africa. The popularity of carabeef rests on its price competitiveness, although quotations are moving nearer to those for beef from competitors such as Australia and Brazil. **Brazil's** stagnant domestic demand and increased competitiveness stemming from the depreciation of the real, the local currency, should promote exports, now projected to rise by 6.1 percent to 1.9 million tonnes. Favourable market conditions for bovine meat are expected to stimulate exports from **Paraguay**, the **EU**, **Argentina** and **Nicaragua**. Increased exports are also forecast for **New Zealand**, arising from drought-related herd reduction and a reduced rate of retention within the dairy herd caused by lower milk payouts. On the other hand, reduced production is anticipated to curb exports by the **United States** and **Australia.** In the case of **Uruguay,** the government-imposed restrictions on trade, to guarantee supplies to the domestic market, are anticipated to constrain exports.

Figure 2. Bovine meat exports



PIGMEAT

Production to grow in all regions

World production of pigmeat is anticipated to grow by 1.9 percent to 119.4 million tonnes in 2015, aided by lower feed costs. ***Asia*** is the leading pigmeat-producing region, accounting for almost 60 percent of the world total. Strong consumer demand and government support policies are anticipated to boost **China**'s output by 1.2 percent, to 57.8 million tonnes, equivalent to almost half of the world total. Elsewhere in Asia, **Vietnam**, the **Philippines** and **Indonesia** are foreseen to register growth rates similar to China**.** Production in **Japan** and the **Republic of Korea** is set to recover following last year's outbreaks of porcine endemic diarrhoea (PED), which reduced piglet numbers. Recovery from the effects of PED is also projected to result in a rise in pigmeat production in the **United States**. Elsewhere in the *Americas*, **Brazil** and **Canada** are set to increase output, stimulated by reduced feed costs. Steady growth is also anticipated for **Mexico**, underpinned by improved genetics and productivity, which translates into more piglets per litter and higher animal weights. Production in the **EU** is expected to continue the expansion seen last year. As a reflection of this, the year-end breeding sow herd increased for the first time in several years. In the **Russian Federation**, government policies favouring large-scale farms have resulted in production doubling over the past decade. The trend towards increased output may be amplified in 2015, following prohibitions of pork imports from the EU and Canada, which together supplied two-thirds of Russian imports before the ban was introduced.

Excess export supplies depress world prices

Trade in pigmeat is expected to recover by 1.6 percent to 7.1 million tonnes in 2015, following a decrease in the previous two years. The **United States**, the **EU** and **Canada** account for four-fifths of the world pig meat exports. Adding **Brazil** and **China** to the group brings the total to more than 90 percent. Expanding production in the main exporting countries is anticipated to be the main driver behind export growth. Abundance of supplies on the world market was reflected in the movement of the FAO Pigmeat Price Index which, after reaching an historic peak in June 2014, had fallen by 37 percent by April, reaching a level last seen in January 2011. An additional factor in the weakness in pigmeat prices was the country-specific import ban introduced by the **Russian Federation**, which particularly affected sales from the **EU**. Initially, EU pigmeat exports were redirected to *Asia*, in particular **Japan**, the **Republic of Korea**, **China** and the **Philippines.** However, towards the end of 2014 and into 2015, demand from these markets slackened and sales declined. A fall in exports increased supply to the EU domestic market causing internal prices to drop substantially. As a consequence, in February 2015, the European Commission opened a private storage aid scheme to assist price recovery. Lower international prices for pigmeat are anticipated to serve as the principal motor of trade growth. **China**, **Mexico**, the **Republic of Korea**, **Vietnam**, **Australia**, **Angola**, **Singapore** and **Colombia** and are all forecast to increase imports. Meanwhile, expansion in production in the **United States**, **Japan** and the **Russian Federation** is anticipated to lead to lower purchases this year.

Figure 3. EU pigmeat exports

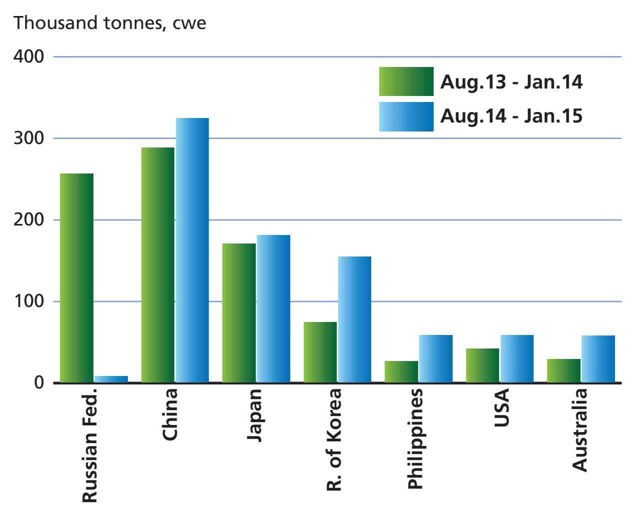
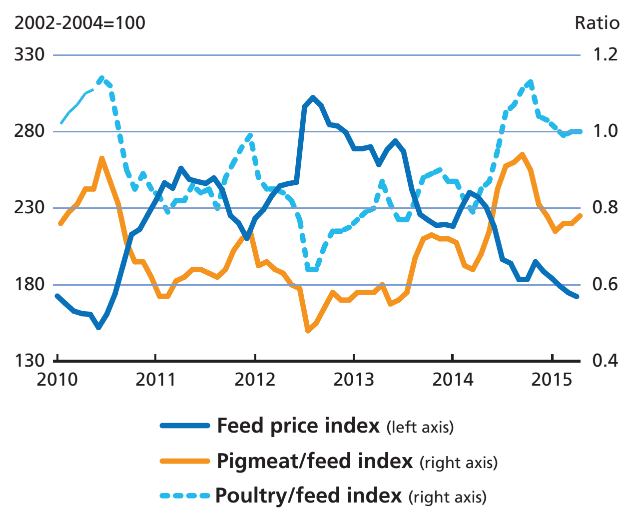


Figure 4. Pork and poultry producers benefit from reduced feed costs



POULTRY

Stagnation in China production weighs on world growth

Limited growth is foreseen for poultry production in 2015. Output is expected to rise by 1.4 percent to 111.8 million tonnes, much slower than the 3 percent per year trend observed over the past decade. While falling feed prices have supported growth in many countries, industry challenges in **China** continue to weigh on the world total. In China, concerns over avian influenza have caused demand for poultry to stagnate. As a consequence, poultry production in China is projected to be unchanged in 2015, at 18.5 million tonnes. Excluding China, the tendency in all the other largest producing countries is expected to be positive. Production in the **United States**, the principal producer, could grow by 0.8 percent, to 20.7 million tonnes. Elsewhere, the other major producers likely to witness gains include the **EU**, **Brazil**, the **Russian Federation**, **Mexico**, **India,** the **Islamic Republic of Iran** and **Turkey**.

Slow trade growth

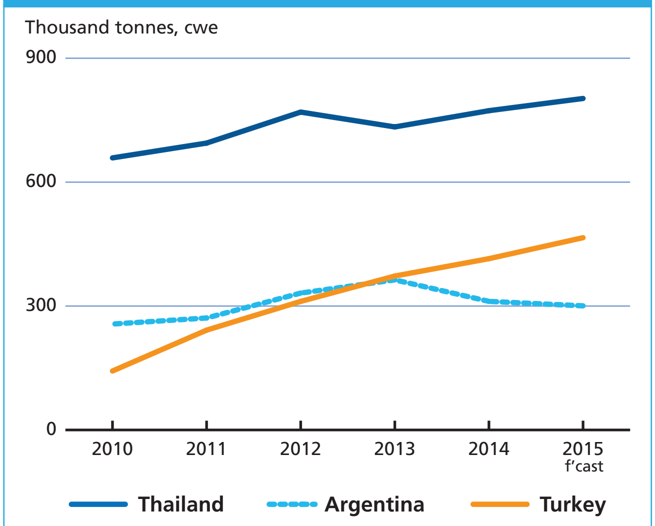
Poultry, the most traded meat category, accounts for over 40 percent of total meat trade. Although poultry trade volume has increased by 55 percent over the past decade, growth has slowed since 2012, a trend expected to continue in 2015, with trade increasing by 2.6 percent to 13.1 million tonnes. In part, the slowdown in growth is a reflection of augmented production in importing countries, which has reduced their need for external meat supplies. Additionally, outbreaks of highly pathogenic avian influenza (HPAI) in some areas of the United States from

January onwards caused numerous countries to suspend imports from this country, pending its containment and eradication.

The two major poultry meat importers, **China** and **Japan**, are projected to maintain their purchases at similar levels to the previous year. Stable to positive growth in imports by other major markets, including **Mexico**, **Saudi Arabia**, the **EU** and **Vietnam**, is expected to contrast with a second year of falling purchases by the **Russian Federation**. In the Federation, imports are provisionally estimated to decline by 12 percent, stemming from abundant domestic production and the August 2014 ban on imports from specific countries. In the case of poultry, this group of countries had supplied approximately three quarters of the Federation's overseas purchases in 2013, which means identifying alternative sources of supply has presented a challenge. In *Africa*, imports as a whole are forecast to rise by 6.7 percent. Among the main importing countries, **Angola** and **Benin** are anticipated to purchase more, as income growth strengthens demand, while imports by **South Africa**, the major trade destination in the region, are forecast to rise by 1 percent.

The three leading exporters, **Brazil**, the **United States** and the **EU,** which together account for almost three quarters of global poultry exports, have seen little expansion in sales in recent years. This situation may change in 2015, when sales by **Brazil** may receive a fillip from the US HPAI-related export restrictions and from the opening up of opportunities in the Russian Federation. Exports by the **United States** for the year as a whole are anticipated to suffer from HPAI-related import restrictions, even falling somewhat, although the severity of the decrease will depend on how soon the disease is contained and eradicated. As a result of this, second-tier exporters, such as **Thailand** and **Turkey**, along with Brazil, are projected to drive the expansion of world poultry exports in 2015. Conversely, **Argentina**, which has also seen substantial growth in recent years, suffered a decline in sales to its principal market, **Venezuela**, in 2014. A further fall in overall sales is anticipated for this year, despite Argentina having widened the focus of its trade to include **China**, **Chile**, **South Africa** and the **Russian Federation**, among others.

Figure 6. Poultry exports



OVINE MEAT

Limited production growth

After stagnating in 2014, production of ovine meat is forecast to show limited growth in 2015, rising by 0.8 percent to 14 million tonnes. Developing countries account for three quarters of the total, with the largest producers being **China**, **India**, **Sudan**, **Pakistan** and **Nigeria**. Generally satisfactory pasture conditions have set the basis for flock rebuilding in many of the major producing areas of Asia and Africa. In Oceania, drought-imposed herd reduction and subsequent rebuilding are anticipated to constrain output in **Australia** and **New Zealand.** In the **EU**, the second largest producer, outbreaks of bluetongue disease reduced both herd size and off-take in several member countries in 2014 and the effects are anticipated to carry over into 2015.

Trade to fall

With **Australia** and **New Zealand** accounting for almost 85 percent of world ovine meat exports, trade in ovine meat is set to fall as a result of restocking in both countries. Overall, trade may drop by 8.5 percent to 940 000 tonnes. In dealing with reduced availabilities, Oceania exporters may maintain supplies to the highest value markets, such as the **EU** and the **United States**, while seeking, to the extent possible, to meet the requirements of growing markets, albeit lower priced ones, including **China**, the **United Arab Emirates**, **Qatar** and **Malaysia**. Among the small-scale exporters, **India** is expected to see sales grow this year, mainly to the Middle East, especially the **United Arab Emirates** and **Saudi Arabia**. Exports by the **EU** and **Uruguay** are forecast to be little changed from last year.

MEAT: MAJOR POLICY DEVELOPMENTS: NOVEMBER 2014 TO MID APRIL 2015*

COUNTRY	PRODUCT	DATE	POLICY CATEGORY/INSTRUMENT	DESCRIPTION
Angola	Poultry	Jan-15	Import quota	Announced import quotas on 14 food items, including meat. The quotas replace the previous system of import licensing.
China	Bovine meat	Feb-15	Import ban lifted	Lifted a long-standing import ban on beef from Ireland: details of the import protocol still need to be agreed.
	Poultry	Jan-15	Import ban	Banned imports of poultry and poultry-related products from the United States, following detection of highly pathogenic avian influenza (HPAI) there.
	Poultry	Jan-15	Market regulation	Published poultry trading and management regulations limiting live bird trading in urban areas, in order to stem the transmission of avian influenza.
European Union	Bovine meat	Mar-15	Import ban lifted	Lifted the import ban on beef from Paraguay, introduced in September 2011 following an outbreak of foot-and-mouth disease there.
	Pigmeat	Mar-15	State market Regulation	Adopted Aid-for-Private-Storage measures for pigmeat.
India	Bovine meat	Dec-14	State Market Regulation	Launched "Rashtriya Gokul Mission" under the National Programme for Bovine Breeding and Dairy Development (NPBBD) to conserve and develop indigenous bovine breeds and to raise productivity.
Iraq	Bovine meat	Mar-15	Import ban lifted	Lifted ban on beef imports from Brazil, which had been introduced in 2014 following a case of bovine spongiform encephalopathy (BSE) there.
	Poultry	Feb-15	Import tax	Announced a substantial increase in import duties on poultry meat and eggs from Turkey.
Japan	All	Feb-15	Regulatory measure	Changed standards on Listeria monocytogenes, facilitating greater importation of meat and other animal products.
Jordan	Poultry	Jan-15	Import ban	Imposed a weight limit of less than 2.5 kg/pack for imported chicken leg quarters.
Kazakhstan	All	Feb-15	Tariff rate quota	Approved the annualtariff quotas for fresh or chilled meat (HS 0201), frozen meat (HS 0202), pork (HS 0203) and poultry meat (HS 0207).
Mexico	Poultry	Jan-15	Import ban	Banned all poultry and poultry products originating in the state of California, including egg products, hatching eggs and baby chicks – due to the presence of highly pathogenic avian influenza (HPAI). Additional testing requirements for poultry from contiguous and nearby US states were also announced.
Pakistan	All	Feb-15	Import ban lifted	Reached an agreement with the USDA regarding health certification of cattle shipped from the United States.
Philippines	Poultry	Feb-15	Import ban	Banned imports of poultry products from Israel and the US state of Oregon, following concerns over the presence of avian influenza.
Russian Federation	Pigmeat	Dec-14	Import ban	Temporarily suspended imports of non-heat-treated pork products from Belarus, due to African swine fever concerns.
South Africa	Bovine meat	Mar-15	Import ban lifted	Lifted ban on beef imports from Brazil, introduced in 2014 following a case of bovine spongiform encephalopathy (BSE) in Brazil.
Switzerland	Poultry	Nov-14	Import ban	Banned imports of poultry from specified areas of the Netherlands and the UK, following outbreaks of avian influenza.
Turkey	All	Mar-15	Market Regulation	Published a decision permitting the importation of feeder cattle by members of associations/ cooperatives, provided it is approved by the Meat and Milk Board (ESK).
Ukraine	Poultry	Nov-14	Import ban	Banned poultry imports from UK, Netherlands and Germany, following reported outbreaks of H5N8 avian influenza.

* A collection of major meat policy developments starting in January 2011 is available at: http://www.fao.org/economic/est/est-commodities/commodity-policy-archive/en/?groupANDcommodity=Meat

APPENDIX TABLE 14: TOTAL **MEAT** STATISTICS[1]
(thousand tonnes, carcass weight equivalent)

	Production		Imports		Exports		Utilization	
	2014 *estim.*	2015 *f'cast*	2014 *estim.*	2015 *f'cast*	2014 *estim.*	2015 *f'cast*	2014 *estim.*	2015 *f'cast*
ASIA	**134 108**	**135 727**	**15 833**	**16 261**	**4 500**	**4 731**	**145 441**	**147 257**
China	87 741	88 390	4 663	4 828	730	753	91 674	92 465
India	6 316	6 530	1	1	1 966	2 048	4 350	4 483
Indonesia	3 340	3 401	103	98	5	5	3 438	3 494
Iran, Islamic Republic of	2 595	2 694	142	157	75	93	2 662	2 758
Japan	3 262	3 287	3 214	3 175	15	14	6 460	6 448
Korea, Republic of	2 232	2 277	1 002	1 058	29	31	3 204	3 304
Malaysia	1 646	1 675	289	294	50	50	1 885	1 919
Pakistan	3 092	3 171	19	24	64	72	3 047	3 122
Philippines	3 135	3 155	440	451	18	19	3 556	3 587
Saudi Arabia	821	829	1 036	1 068	62	66	1 795	1 832
Singapore	118	119	331	355	28	30	421	444
Thailand	2 712	2 795	40	41	851	879	1 901	1 956
Turkey	3 106	3 145	3	4	450	502	2 659	2 647
Viet Nam	4 328	4 413	1 783	1 886	22	26	6 089	6 273
AFRICA	**17 087**	**17 286**	**2 866**	**2 991**	**239**	**269**	**19 714**	**20 007**
Algeria	742	747	102	102	1	1	843	849
Angola	267	274	693	766	-	-	960	1 039
Egypt	2 097	2 089	333	329	16	10	2 414	2 408
Nigeria	1 464	1 494	4	4	1	1	1 468	1 497
South Africa	2 821	2 848	459	459	148	184	3 131	3 122
CENTRAL AMERICA	**8 872**	**9 030**	**2 820**	**2 872**	**505**	**539**	**11 187**	**11 364**
Cuba	304	303	244	230	-	-	549	533
Mexico	6 184	6 301	1 848	1 907	274	285	7 758	7 923
SOUTH AMERICA	**42 050**	**42 765**	**1 197**	**1 139**	**8 128**	**8 497**	**35 118**	**35 407**
Argentina	5 274	5 359	14	15	562	565	4 726	4 809
Brazil	26 348	26 806	85	93	6 546	6 852	19 887	20 048
Chile	1 457	1 458	362	356	289	286	1 530	1 528
Colombia	2 396	2 421	134	143	14	12	2 517	2 552
Uruguay	650	683	40	38	348	371	342	349
Venezuela	2 073	2 146	468	397	-	-	2 540	2 542
NORTH AMERICA	**46 854**	**47 481**	**2 775**	**2 678**	**9 252**	**9 242**	**40 377**	**40 917**
Canada	4 491	4 581	769	766	1 717	1 723	3 542	3 624
United States of America	42 362	42 899	1 995	1 900	7 535	7 519	36 822	37 280
EUROPE	**59 470**	**60 324**	**3 767**	**3 661**	**4 797**	**4 872**	**58 440**	**59 113**
Belarus	1 147	1 159	86	110	312	325	921	944
European Union	45 515	46 079	1 291	1 325	4 037	4 106	42 769	43 297
Russian Federation	8 615	8 886	1 880	1 719	143	129	10 352	10 475
Ukraine	2 559	2 564	109	111	206	212	2 463	2 463
OCEANIA	**6 242**	**6 089**	**443**	**455**	**3 225**	**3 026**	**3 460**	**3 518**
Australia	4 500	4 325	222	234	2 253	2 057	2 470	2 502
New Zealand	1 235	1 255	70	70	969	966	336	359
WORLD	**314 683**	**318 701**	**29 700**	**30 056**	**30 645**	**31 176**	**313 737**	**317 582**
Developing countries	192 914	195 470	18 658	19 243	13 197	13 826	198 375	200 888
Developed countries	121 769	123 231	11 042	10 814	17 448	17 350	115 362	116 694
LIFDCs	22 204	22 637	1 845	1 922	2 138	2 241	21 911	22 318
LDCs	10 011	10 179	1 683	1 816	11	12	11 683	11 983

[1] Including "other meat".

APPENDIX TABLE 15: **BOVINE MEAT** STATISTICS
(thousand tonnes, carcass weight equivalent)

	Production		Imports		Exports		Utilization	
	2014 *estim.*	2015 *f'cast*	2014 *estim.*	2015 *f'cast*	2014 *estim.*	2015 *f'cast*	2014 *estim.*	2015 *f'cast*
ASIA	**17 611**	**17 683**	**4 609**	**4 852**	**2 183**	**2 269**	**20 045**	**20 305**
China	6 546	6 459	1 189	1 340	43	42	7 713	7 767
India	2 621	2 678	-	1	1 933	2 010	688	668
Indonesia	591	601	93	86	-	1	683	686
Iran, Islamic Republic of	253	254	127	140	4	3	377	391
Japan	495	482	737	731	2	2	1 221	1 221
Korea, Republic of	330	325	346	365	5	5	671	701
Malaysia	31	31	194	202	13	12	211	221
Pakistan	1 680	1 735	5	4	29	33	1 656	1 707
Philippines	290	286	142	145	4	3	427	428
AFRICA	**6 161**	**6 229**	**764**	**763**	**76**	**100**	**6 850**	**6 892**
Algeria	135	132	94	95	-	-	229	228
Angola	107	108	143	150	-	-	250	258
Egypt	870	860	300	300	2	1	1 168	1 159
South Africa	860	862	30	29	45	70	846	820
CENTRAL AMERICA	**2 468**	**2 509**	**381**	**378**	**310**	**338**	**2 538**	**2 549**
Mexico	1 770	1 782	223	220	133	138	1 860	1 864
SOUTH AMERICA	**15 776**	**16 017**	**462**	**422**	**2 740**	**2 927**	**13 488**	**13 517**
Argentina	2 809	2 848	-	1	215	230	2 594	2 618
Brazil	9 820	9 973	71	80	1 839	1 950	8 052	8 103
Chile	209	211	224	220	5	5	428	426
Colombia	840	835	4	4	11	9	833	831
Uruguay	525	550	3	2	308	330	220	221
Venezuela	510	512	144	100	-	-	644	617
NORTH AMERICA	**12 280**	**12 028**	**1 507**	**1 428**	**1 562**	**1 531**	**12 288**	**11 921**
Canada	1 160	1 163	280	275	343	341	1 110	1 098
United States of America	11 120	10 864	1 224	1 150	1 218	1 190	11 175	10 820
EUROPE	**10 453**	**10 590**	**1 263**	**1 209**	**516**	**502**	**11 201**	**11 297**
European Union	7 661	7 788	327	323	315	335	7 674	7 776
Russian Federation	1 654	1 687	830	780	46	19	2 438	2 448
Ukraine	459	443	3	4	18	16	445	430
OCEANIA	**3 013**	**2 861**	**60**	**59**	**2 209**	**2 108**	**934**	**814**
Australia	2 423	2 251	12	12	1 680	1 560	825	706
New Zealand	570	590	17	14	526	545	61	59
WORLD	**67 762**	**67 916**	**9 046**	**9 111**	**9 596**	**9 774**	**67 344**	**67 296**
Developing countries	38 834	39 234	5 297	5 507	5 261	5 559	38 878	39 216
Developed countries	28 927	28 682	3 749	3 604	4 335	4 215	28 467	28 079
LIFDCs	8 102	8 243	297	295	2 071	2 167	6 328	6 371
LDCs	3 485	3 533	218	229	3	3	3 700	3 758

APPENDIX TABLE 16: **OVINE MEAT** STATISTICS
(thousand tonnes, carcass weight equivalent)

	Production		Imports		Exports		Utilization	
	2014 *estim.*	**2015** *f'cast*	**2014** *estim.*	**2015** *f'cast*	**2014** *estim.*	**2015** *f'cast*	**2014** *estim.*	**2015** *f'cast*
ASIA	**8 102**	**8 191**	**643**	**577**	**45**	**53**	**8 700**	**8 716**
Bangladesh	210	213	-	-	-	-	210	213
China	4 128	4 178	327	273	2	1	4 453	4 450
India	741	732	-	-	23	27	718	706
Iran, Islamic Republic of	280	291	2	7	-	-	282	298
Pakistan	464	467	-	-	13	15	451	452
Saudi Arabia	132	134	60	55	3	3	189	186
Turkey	360	366	1	1	-	-	361	367
AFRICA	**3 064**	**3 101**	**33**	**31**	**36**	**37**	**3 061**	**3 095**
Algeria	308	315	5	3	-	-	313	318
Nigeria	481	487	-	-	-	-	481	487
South Africa	181	182	10	10	2	1	189	191
Sudan	482	483	-	-	6	6	477	478
CENTRAL AMERICA	**125**	**124**	**21**	**22**	**-**	**-**	**145**	**146**
Mexico	96	95	11	13	-	-	107	108
SOUTH AMERICA	**322**	**324**	**10**	**8**	**26**	**25**	**305**	**307**
Brazil	117	116	10	8	-	-	127	124
NORTH AMERICA	**91**	**92**	**118**	**104**	**4**	**5**	**205**	**191**
United States of America	74	75	98	85	4	5	167	155
EUROPE	**1 217**	**1 224**	**176**	**174**	**36**	**38**	**1 357**	**1 360**
European Union	898	901	156	157	28	30	1 026	1 028
Russian Federation	191	191	10	8	-	-	201	200
OCEANIA	**987**	**964**	**28**	**23**	**880**	**781**	**135**	**205**
Australia	575	558	1	1	482	408	94	152
New Zealand	411	405	4	3	398	374	17	34
WORLD	**13 907**	**14 019**	**1 028**	**941**	**1 028**	**940**	**13 908**	**14 020**
Developing countries	10 796	10 913	696	628	105	114	11 387	11 427
Developed countries	3 111	3 107	332	313	922	826	2 521	2 593
LIFDCs	3 698	3 728	25	22	31	35	3 692	3 715
LDCs	1 896	1 919	6	6	6	6	1 896	1 919

APPENDIX TABLE 17: **PIGMEAT** STATISTICS
(thousand tonnes, carcass weight equivalent)

	Production		Imports		Exports		Utilization	
	2014 *estim.*	2015 *f'cast*	2014 *estim.*	2015 *f'cast*	2014 *estim.*	2015 *f'cast*	2014 *estim.*	2015 *f'cast*
ASIA	**68 019**	**68 867**	**3 753**	**3 852**	**299**	**315**	**71 424**	**72 611**
China	57 091	57 768	1 346	1 413	200	213	58 212	59 168
India	355	357	1	1	-	-	355	357
Indonesia	744	748	3	3	-	-	747	750
Japan	1 273	1 295	1 351	1 300	2	2	2 588	2 592
Korea, D.P.R.	113	114	3	3	-	-	116	117
Korea, Republic of	1 200	1 240	486	520	3	3	1 695	1 766
Malaysia	230	230	16	15	6	5	240	239
Philippines	1 701	1 724	122	121	3	3	1 821	1 842
Thailand	980	985	4	3	34	35	950	953
Viet Nam	3 284	3 352	183	213	22	25	3 446	3 540
AFRICA	**1 326**	**1 356**	**317**	**331**	**33**	**32**	**1 610**	**1 655**
Madagascar	59	60	-	-	-	-	59	60
Nigeria	255	257	1	1	-	-	256	258
South Africa	221	225	25	22	24	25	222	221
Uganda	118	120	1	1	-	-	118	120
CENTRAL AMERICA	**1 806**	**1 854**	**894**	**919**	**146**	**150**	**2 554**	**2 624**
Cuba	194	191	15	17	-	-	209	208
Mexico	1 285	1 335	711	735	127	131	1 870	1 939
SOUTH AMERICA	**5 485**	**5 692**	**190**	**193**	**807**	**821**	**4 868**	**5 065**
Argentina	450	485	11	8	1	1	460	492
Brazil	3 344	3 494	2	2	646	661	2 700	2 836
Chile	553	554	44	41	157	155	440	440
Colombia	245	249	71	82	-	-	316	331
Venezuela	250	260	8	6	-	-	258	266
NORTH AMERICA	**12 377**	**13 051**	**792**	**784**	**3 303**	**3 337**	**9 885**	**10 493**
Canada	2 008	2 051	239	240	1 176	1 181	1 074	1 115
United States of America	10 368	11 000	548	540	2 127	2 155	8 807	9 374
EUROPE	**27 663**	**28 077**	**739**	**714**	**2 388**	**2 437**	**26 014**	**26 354**
Belarus	443	451	41	61	79	86	405	426
European Union	22 681	22 964	15	15	2 222	2 259	20 475	20 720
Russian Federation	3 013	3 157	535	480	32	33	3 517	3 604
Serbia	242	240	29	31	26	27	245	244
Ukraine	809	790	40	51	12	16	838	825
OCEANIA	**497**	**501**	**262**	**278**	**35**	**33**	**719**	**745**
Australia	365	365	192	202	34	32	518	535
Papua New Guinea	73	72	8	9	-	-	81	81
WORLD	**117 173**	**119 398**	**6 947**	**7 072**	**7 011**	**7 124**	**117 075**	**119 548**
Developing countries	75 046	76 147	3 742	3 938	1 259	1 289	77 515	79 005
Developed countries	42 127	43 251	3 205	3 134	5 752	5 835	39 561	40 543
LIFDCs	3 307	3 355	286	287	7	8	3 586	3 634
LDCs	1 570	1 593	238	259	1	1	1 807	1 851

APPENDIX TABLE 18: **POULTRY MEAT** STATISTICS
(thousand tonnes, carcass weight equivalent)

	Production		Imports		Exports		Utilization	
	2014 *estim.*	2015 *f'cast*	2014 *estim.*	2015 *f'cast*	2014 *estim.*	2015 *f'cast*	2014 *estim.*	2015 *f'cast*
ASIA	**38 431**	**39 030**	**6 776**	**6 929**	**1 948**	**2 070**	**43 248**	**43 902**
China	18 500	18 500	1 795	1 796	471	483	19 823	19 814
India	2 451	2 614	-	-	9	9	2 442	2 605
Indonesia	1 889	1 935	2	3	-	-	1 891	1 937
Iran, Islamic Republic of	2 045	2 132	10	7	68	88	1 987	2 052
Japan	1 481	1 497	1 089	1 110	11	10	2 540	2 594
Korea, Republic of	690	700	154	158	21	23	812	842
Kuwait	41	43	125	123	-	-	166	165
Malaysia	1 383	1 412	49	51	31	32	1 401	1 430
Saudi Arabia	580	586	810	840	30	32	1 360	1 394
Singapore	99	100	143	146	9	10	233	236
Thailand	1 540	1 620	10	8	773	803	796	835
Turkey	1 806	1 820	-	-	415	465	1 392	1 355
Yemen	151	149	130	132	-	-	281	281
AFRICA	**5 101**	**5 158**	**1 719**	**1 833**	**86**	**94**	**6 733**	**6 897**
Angola	34	35	387	435	-	-	420	470
South Africa	1 536	1 557	394	398	71	82	1 858	1 873
CENTRAL AMERICA	**4 354**	**4 422**	**1 505**	**1 534**	**47**	**49**	**5 813**	**5 907**
Cuba	31	33	210	194	-	-	241	227
Mexico	2 930	2 987	889	925	13	15	3 806	3 897
SOUTH AMERICA	**20 223**	**20 525**	**533**	**514**	**4 488**	**4 658**	**16 268**	**16 380**
Argentina	1 830	1 840	2	6	311	300	1 521	1 546
Brazil	13 035	13 191	3	3	4 037	4 216	9 001	8 978
Chile	670	668	94	95	117	116	647	647
Venezuela	1 300	1 360	316	290	-	-	1 616	1 650
NORTH AMERICA	**21 857**	**22 060**	**347**	**349**	**4 346**	**4 331**	**17 861**	**18 058**
Canada	1 283	1 326	226	229	178	180	1 313	1 365
United States of America	20 574	20 734	117	116	4 168	4 150	16 543	16 689
EUROPE	**18 943**	**19 240**	**1 422**	**1 397**	**1 772**	**1 811**	**18 593**	**18 828**
European Union	13 232	13 383	692	730	1 390	1 400	12 534	12 713
Russian Federation	3 666	3 760	458	403	64	77	4 060	4 088
Ukraine	1 242	1 283	64	56	176	181	1 131	1 158
OCEANIA	**1 318**	**1 332**	**89**	**91**	**60**	**62**	**1 347**	**1 361**
Australia	1 116	1 129	17	18	44	44	1 088	1 102
New Zealand	176	176	1	1	16	18	160	159
WORLD	**110 227**	**111 767**	**12 392**	**12 647**	**12 747**	**13 075**	**109 863**	**111 335**
Developing countries	64 268	65 222	8 832	9 081	6 478	6 770	66 630	67 549
Developed countries	45 959	46 546	3 560	3 566	6 269	6 305	43 233	43 786
LIFDCs	5 525	5 730	1 208	1 288	27	28	6 707	6 991
LDCs	2 417	2 488	1 195	1 297	2	2	3 610	3 783

APPENDIX TABLE 27: SELECTED INTERNATIONAL **MEAT** PRICES

	Bovine meat prices			Ovine meat price	Pig meat prices			Poultry meat prices	
Period	Australia	United States	Brazil	New Zealand	United States	Brazil	Germany	United States	Brazil
Annual (Jan/Dec)					*(USD per tonne)*				
2007	2 544	4 023	2 367	2 498	2 117	2 200	1 907	935	1 443
2008	3 024	4 325	3 785	2 975	2 270	3 000	2 364	997	1 896
2009	2 562	3 897	3 118	3 495	2 202	2 223	2 035	989	1 552
2010	3 272	4 378	3 919	3 662	2 454	2 747	1 913	1 032	1 781
2011	3 944	4 516	4 816	5 370	2 648	3 023	2 169	1 147	2 083
2012	4 176	4 913	4 492	4 754	2 676	2 784	2 233	1 228	1 931
2013	4 009	5 535	4 326	4 130	2 717	2 872	2 311	1 229	2 014
2014	5 016	6 678	4 515	4 687	3 183	3 434	2 106	1 206	1 940
Monthly									
2014 – April	4 305	6 190	4 435	4 517	2 999	2 980	2 265	1 230	1 929
2014 - May	4 252	6 240	4 566	4 674	3 194	3 413	2 294	1 185	1 973
2014 - June	4 399	6 326	4 598	4 916	3 345	4 072	2 410	1 199	2 045
2014 - July	5 141	6 424	4 617	5 059	3 432	3 701	2 293	1 221	2 038
2014 – August	5 810	6 912	4 718	4 893	3 559	3 702	2 227	1 270	1 992
2014 - September	6 168	7 049	4 629	4 679	3 442	4 000	2 047	1 233	1 962
2014 - October	6 014	7 378	4 773	4 718	3 260	4 225	1 824	1 242	2 006
2014 - November	5 900	7 528	4 627	4 792	3 281	3 699	1 784	1 228	1 969
2014 - December	5 352	7 655	4 544	4 447	3 327	2 939	1 670	1 195	1 873
2015 - January	5 062	7 161	4 186	3 882	3 147	2 727	1 535	1 173	1 743
2015 - February	4 572	6 903	4 087	3 741	3 008	2 632	1 638	1 127	1 672
2015 – March	4 661	7 020	3 928	3 661	3 040	2 484	1 576	1 120	1 631
2015 - April	5 014	7 160	4 005	3 724	3 050	2 435	1 623	1 110	1 598

Bovine meat prices:
Australia: Cow 90CL export prices to the USA (FAS)
USA: Frozen beef, export unit value
Brazil: Frozen beef, export unit value

Ovine meat prices
New Zealand: Lamb 17.5kg cwt, export price

Pig meat prices:
USA: Frozen pigmeat, export unit value
Brazil: Frozen pigmeat, export unit value
Germany: Monthly market price for pig carcase grade E

Poultry meat prices:
USA: Broiler cuts, export unit value
Brazil: Export unit value for chicken (f.o.b.)

APPENDIX TABLE 28: SELECTED INTERNATIONAL **MEAT** PRICES AND FAO **MEAT** PRICE INDICES

	FAO indices				
Period	**Total meat**	**Bovine meat**	**Ovine meat**	**Pig meat**	**Poultry meat**
Annual (Jan/Dec)			*(2002-2004=100)*		
2007	131	126	108	125	151
2008	161	158	128	152	184
2009	141	135	151	131	162
2010	158	165	158	138	179
2011	183	191	232	153	206
2012	182	195	205	153	201
2013	184	197	178	157	206
2014	198	231	202	164	200
Monthly					
2014 – April	190	212	195	161	201
2014 - May	195	213	202	171	201
2014 - June	203	217	212	185	206
2014 - July	206	231	218	178	207
2014 – August	212	250	211	178	207
2014 - September	211	257	202	173	203
2014 - October	210	260	204	165	207
2014 - November	206	258	207	158	203
2014 - December	196	249	192	147	195
2015 - January	183	233	168	137	185
2015 - February	177	220	162	137	178
2015 – March	175	221	158	134	175
2015 - April	178	229	161	135	172

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), 1 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 2002/2004. Prices for the two most recent months may be estimates and subject to revision.