MEAT AND MEAT PRODUCTS

After stagnating in 2016, world meat production is forecast to recover in 2017, increasing by 1.1 percent, or 3.5 million tonnes, to 324.8 million tonnes, amid moderate increases in bovine, pig and poultry meats and a modest gain in ovine meat. Much of the global meat output expansion is forecast to originate in the United States, Brazil, the Russian Federation, Mexico and India, but also in Argentina, Turkey and Thailand. After two years of downsizing associated with an on-going process of farm restructuration and consolidation, meat production in China, the world's largest meat producer, is expected to remain stable around the 2016 level, as expansions in ovine, pig and bovine meats are anticipated to compensate for a marked decline in poultry meat, constrained mainly by the spread of the highly pathogenic avian influenza (HPAI).

World trade in meat is forecast to reach 31.5 million tonnes in 2017, 1.2 percent above last year, but the growth is slower than the 4.4 percent registered in 2016. World trade in bovine meat is expected to record the fastest expansion, followed by poultry, while pigmeat and ovine meat trade may fall somewhat. On the demand side, Japan, Angola, Cuba and Mexico, as well as the Republic of Korea, Iraq, Chile, the United Arab Emirates and Viet Nam are all expected to step up imports. By contrast, meat imports by China, the EU, Egypt, Saudi Arabia, South Africa and Canada may decline, in some cases a reflection of larger domestic supplies and, in others, of falling demand in the wake of relatively high international prices. Among exporters, the United States, Thailand, India, Argentina, Ukraine and Brazil are all anticipated to step up meat exports in 2017, while the EU, Australia, New Zealand, Paraguay and Chile may see theirs fall. The spread of the HPAI is expected to affect the direction and pace of poultry meat production and trade across different regions.

International prices of all meat categories firmed moderately over the first half of the year but levelled off in recent months due to intensified competition and sluggish import demand. Across the various meat categories, the ovine meat prices gained as much as 39 percent, while bovine, poultry and pigmeat prices individually increased by nearly 7 percent. The FAO Meat Price Index gained 9 percent, or 14 points, between January and October 2017, mainly reflecting the price movements of bovine, pig and poultry meats, which have larger weights in the index.

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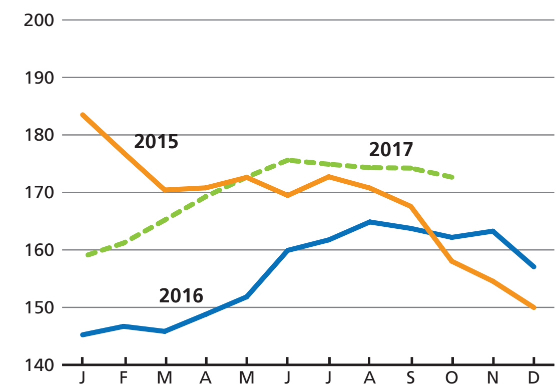
FAO INTERNATIONAL MEAT PRICE INDEX (2002-2004 = 100)



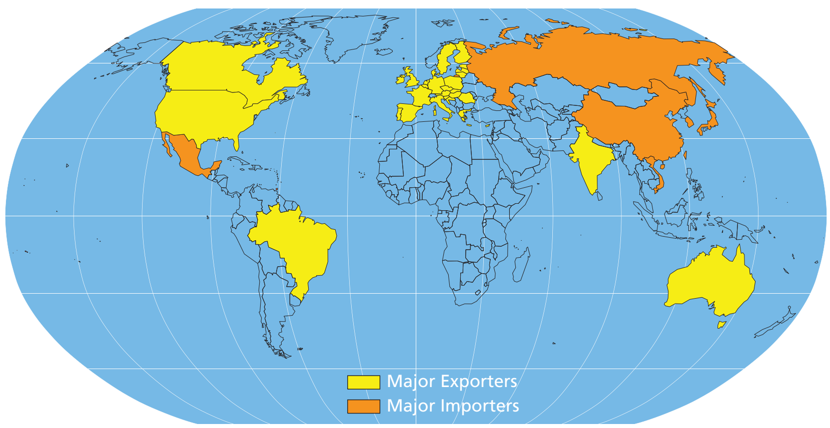
WORLD MEAT MARKET AT A GLANCE

	2015	2016 *estim.*	2017 *f'cast*	Change: 2017 over 2016
		million tonnes		%
WORLD BALANCE				
Production	**320.5**	**321.3**	**324.8**	**1.1**
Bovine meat	67.6	68.3	69.5	1.7
Poultry meat	116.9	117.2	118.2	0.9
Pigmeat	116.1	115.8	117.0	1.0
Ovine meat	14.4	14.4	14.5	0.6
Trade	**29.8**	**31.2**	**31.5**	**1.2**
Bovine meat	9.2	8.9	9.1	2.2
Poultry meat	12.2	12.8	13.1	2.0
Pigmeat	7.2	8.3	8.2	-0.7
Ovine meat	1.0	0.9	0.9	-0.5
SUPPLY AND DEMAND INDICATORS				
Per caput food consumption:				
World (kg/year)	43.3	43.0	42.9	-0.1
Trade - share of prod. (%)	*9.3*	*9.7*	*9.7*	*0.1*

FAO MEAT PRICE INDEX (2002-2004=100)	**2015**	**2016**	**2017** *Jan-Oct*	**Change: Jan-Oct 2017 over Jan-Oct 2016 %**
	168	156	170	9.3

MEAT AND MEAT PRODUCTS

Major Meat Exporters and Importers



PRICES

Moderate price increases

After increasing from January to June 2017, international meat prices levelled off. In the first half of the year, the price increases were underpinned by a lively import demand for most meat categories. Short availabilities for export were also behind steeply rising ovine meat price, also providing support to bovine prices. Since July, increased competition and more sluggish import demand have weighed on international meat prices of all meats. Across the various meat categories, the ovine meat prices gained as much as 39 percent, while bovine, poultry and pigmeat prices individually increased by nearly 7 percent. The FAO Meat Price Index gained 9 percent, or 14 points, between January and October 2017, mainly reflecting the price movements of bovine, pig and poultry meats, which have larger weights in the index.

Figure 1. FAO monthly meat price index (2002-2004=100)

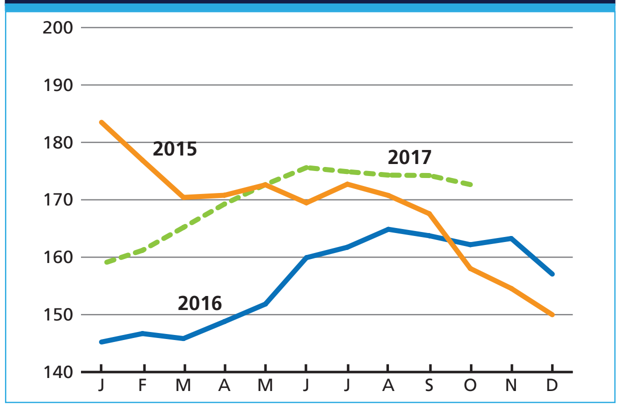
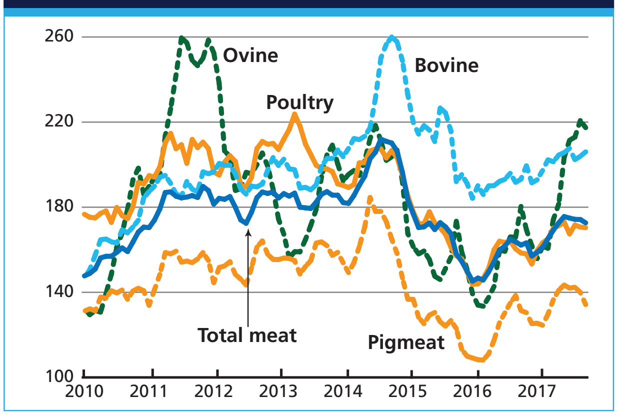


Figure 2. FAO monthly international price indices for bovine, ovine, pigmeat and poultry meat (2002-2004=100)



MEAT PRODUCTION AND TRADE

Production to recover growth, but the trade expansion to slow down

After stagnating in 2016, world meat production is forecast to recover in 2017, increasing by 1.1 percent, or 3.5 million tonnes, to 324.8 million tonnes, amid moderate increases in bovine, pig and poultry meats and a modest gain in ovine meat. Much of the global meat output expansion is forecast to originate in the United States, Brazil, the

Table 1. World meat market at a glance

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		million tonnes		%
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Russian Federation, Mexico and India, but also in Argentina, Turkey and Thailand. After two years of downsizing associated with an on-going process of reforms including farm consolidation, meat production in China, the world's largest meat producer, is expected to remain stable around the 2016 level, as expansions in ovine, pig and bovine meats are anticipated to compensate for a marked decline in poultry meat, constrained mainly by the spread of the highly pathogenic avian influenza (HPAI).

Global trade in meat in 2017 is forecast to reach 31.5 million tonnes, 1.2 percent above last year, but the growth is slower than the 4.4 percent growth registered in 2016. World trade in bovine meat is expected to record the fastest expansion, followed by poultry, while trade in pigmeat and ovine meat may fall somewhat. On the demand side, Japan, Angola, Cuba and Mexico, as well as the Republic of Korea, Iraq, Chile, the United Arab Emirates and Viet Nam are all expected to step up imports. By contrast, meat imports by China, the EU, Egypt, Saudi Arabia, South Africa and Canada may decline, in some cases a reflection of larger domestic supplies and, in others, of falling demand in the wake of relatively high international prices. Among exporters, the United States, Thailand, India, Argentina, Ukraine and Brazil are all anticipated to step up meat sales abroad in 2017, unlike the EU, Australia, New Zealand, Paraguay and Chile which may see theirs fall.

BOVINE MEAT

Production: growth concentrated in the Americas

After stagnating between 2013 and 2015 and growing by 1.1 percent in 2016, bovine meat output is forecast to increase by 1.7 percent to nearly 70 million tonnes in 2017, adding 1.2 million tonnes to world supply. The **United States**, **Brazil**, **Argentina**, **Turkey** and **China** are expected to see the most sizeable gains, while declines are expected in **South Africa,** the **Russian Federation** and **Australia**.

In *North America*, meat output in the **United States** is forecast to reach a 9-year high of 12.1 million tonnes, an increase of 5.3 percent. Likewise, **Canada** may see production rise by nearly 3 percent to 1.2 million tonnes. In both countries, the expansions will be sustained by increases in carcass weight as well as slaughter numbers.

After three years of continuous declines, output in *South America* is forecast to recover by 2.1 percent to nearly 16 million tonnes, boosted by sizeable gains in Brazil and Argentina. In **Brazil**, producers have been able to benefit from a competitive production environment, including the availability of feed at relatively cheaper prices, reinforced by this year's good weather. In **Argentina**, a period of herd rebuilding lasting nearly four years has resulted in an expanded herd. In addition, even though some regions continue to experience excess water following extensive flooding in 2016/17, pasture conditions have generally improved and feed prices have dropped. In **Colombia** and **Uruguay**, output is projected to increase, as the recent cycle in herd rebuilding has ended, offering a basis for increased slaughtering and output.

In *Central America and the Caribbean,* weather conditions have become generally more favourable in 2017, compared with the extreme conditions linked to *El Niño* in 2015 and 2016. As a result, output in the sub-region is expected to recover by about 2 percent this year. In **Mexico**, bovine meat production is expected to be up this year, as heavier carcass weights should more than offset a decline in slaughtered cattle numbers. However, the rather positive outlook for the country and, more generally, for the sub-region might be marred by the recent setbacks, namely hurricanes and earthquakes.

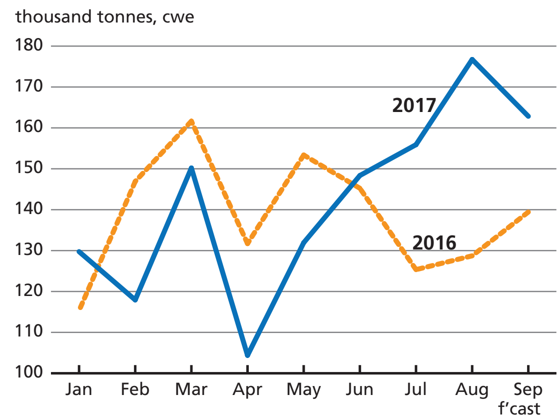
In *Asia*, **India**'s bovine meat output is expected to continue growing, but less vigorously than in 2016. The expected slowdown would be mainly driven by the informal sector, the production of which might be negatively affected by the ban imposed on selling cattle for slaughter. The same ban is unlikely to impair production in the relatively large, organized livestock operations, approved by the government. In **China**, bovine meat production is anticipated to rise by 1 percent to 7.1 million tonnes, supported by stable domestic prices and increased slaughter of uneconomical dairy cows. Moreover, China's restructuring of its livestock operations has encouraged some small-scale farm owners to exit the sector, providing more cattle for slaughter. Output in **Japan** is set to decline, as heavier carcass weights will not suffice to offset a decline in slaughter numbers. In the **Republic of Korea**, a rise in cattle numbers and a drop in cattle prices are expected to result in increased slaughtering and meat output.

In *Africa*, bovine meat production is unlikely to rebound, as poor pasture conditions persist in some eastern parts of the continent including in **Kenya**, **Somalia**, **Ethiopia** and **Tanzania.** A sharp production decline is even anticipated in **South Africa**, where the 2016 drought has fostered the culling of cattle, while the improved rainfall in 2017 encouraged herd rebuilding, all likely to contribute to a reduction of cattle slaughtering and bovine meat output this year. Meanwhile, **Malawi**, and **Zambia**, where weather conditions are expected to improve this year, may experience a rebound in production.

In *Oceania*, bovine meat production is forecast to contract for a third consecutive year, albeit by only 1.2 percent in 2017, compared with a staggering 14.4 percent reduction in 2016. In **Australia**, notwithstanding the slow growth in national cattle herd, indicating an end to the herd-rebuilding phase, bovine output in 2017 is expected to fall by 1 percent to 2.1 million tonnes. However, much will depend on the weather conditions over the coming months, with current predictions indicating equal chances of dry and wet conditions. Similarly, **New Zealand** may witness a 1.9 percent reduction of bovine meat output to 604 000 tonnes, as the expected slight increase of carcass weights, especially evident in recent months, is unlikely to offset the reduction of slaughter numbers. Moreover, improved pasture conditions have prompted retention of cattle for longer periods and, in turn, reduced the availability of cattle for slaughter.

In the **EU,** bovine meat output is expected to remain stable, as relatively high dairy prices are discouraging farmers from selling cattle for slaughter. In the **Russian Federation**, bovine meat output may drop by about 1 percent to 1 581 thousand tonnes.

Figure 3. Brazil's bovine meat exports



Trade recovery likely

World trade in bovine meat is anticipated to recover by 2.2 percent to 9.1 million tonnes in 2017, after two years of decline. The increase would be fostered by an upturn in import demand, especially in **China, Japan, Viet Nam, Indonesia** and **the Republic of Korea**, while significant declines are anticipated in **Egypt**, the **United States, Canada** and the **EU**. **China**'s imports could reach 1.5 million tonnes in 2017, a rise of 6.3 percent, which is far below the 16.2 percent increase of 2016. Meanwhile, bovine imports by the **United States** are anticipated to decline by 1.9 percent to 1.2 million tonnes, mainly owing to a continuous expansion in domestic output. Among international suppliers, the **United States**, **India**, **Argentina**, the **EU** and **Brazil** are anticipated to be responsible for much of the 2017 increase in world bovine meat exports, along with **Canada**, **Mexico** and **Ukraine**. In contrast, exports from **Australia**, **New Zealand**, **Paraguay** and **Belarus** are forecast to decline. The **United States** is predicted to record a 6.9 percent growth in bovine meat exports to 1.3 million tonnes, underpinned by more abundant domestic supplies and limited availabilities in Oceania. US market access to Japan, however, will be restricted by the tariff quota triggered by Japan in July and continuing until March 2018. **Brazil** is also anticipated to witness a lively export growth, supported by its increased production and improved market access to large markets such as China, especially driven by existing bilateral agreements. **India** is expected to see its exports rise by 3.2 percent, to 1.7 million tonnes, supported by continuing import demand from its traditional markets, including Viet Nam, Malaysia, Egypt and Saudi Arabia, but also from Indonesia, which recently granted quota access. The **EU,** building on last year's export expansion, may see bovine meat exports jump by a further 10 percent in 2017, which would bring them back to their 2011 level. Bovine meat exports by **Australia** are forecast to fall by only 2 percent, following a 20 percent dip in 2016, a reflection of easing production constraints and improved market access through bilateral agreements with, for example, Japan and the Republic of Korea. In contrast, **New Zealand**'s bovine meat exports are predicted to fall for a second year to about half a million tonnes, 3.4 percent less than in 2016. Bovine meat exports by **Belarus** may also undergo a contraction following the ban imposed by the Russian Federation on the allegation that Belarus sourced its beef from Ukraine.

PIGMEAT

Production to recover and reach a new record

World pigmeat output is forecast to rise by 1 percent, or over 1.2 million tonnes, to nearly 117 million tonnes in 2017, recovering from a slight decline in 2016 and setting a new record. Expanded output is forecast to originate in **China**, the **United States**, the **Russian Federation** and the **Philippines,** but also **Canada, Viet Nam, Mexico,** and the **Republic of Korea**. However, pigmeat output is likely to decline in the **EU**, **Ukraine** and **Japan.**

China's pigmeat output is anticipated to rise by 1.3 percent to nearly 53 million tonnes or 655 000 tonnes more than in 2016. The recovery of output, after two years of downsizing, reflects a largely positive outcome of the strict enforcement of environmental and sanitary regulations, especially the need to limit the pollution of water supplies, that have resulted in deep reforms including the closure of many unviable small farms or their consolidation, relocation of farms away from sources of water supply and modernisation of manure management. In the **United States,** pigmeat output is anticipated to rise by 3.6 percent to 11.7 million tonnes, bolstered by higher slaughter numbers and carcass weights, supported by efficient piggery operations, integrated with those of Canada and Mexico**.** Similarly, **Mexico**'s output is expected to grow by 3.2 percent, to nearly 1.4 million tonnes, underpinned by the use of new genetics and economies of scale. In the **Russian Federation**, the modernization of large operations and new investments into the sector are expected to boost pigmeat output by 3.1 percent to 3.5 million tonnes.

In contrast, **EU** pigmeat production is likely to stabilize around 23.4 million tonnes, constrained by reduced sow herd numbers and falling import demand, especially from China. In **Ukraine**, output may contract by 18 percent, to about 623 000 tonnes, due to low profitability, and a sharp drop in its pig herd due to the African Swine Fever.

Trade likely to fall

World trade in pigmeat is forecast to decline marginally, by 0.7 percent, to 8.2 million tonnes, as compared with its hefty 14 percent increase in 2016. The considerable slow down reflects a decline in pigmeat imports by **China** by nearly 14 percent in 2017, to 2.2 million tonnes, which would still keep China as the most important international market for pigmeat. The reduction of China's pigmeat purchases would mirror the combination of increased domestic production and depressed consumer demand.

Figure 4. Feed prices are relatively favourable for poultry and pigmeat producers

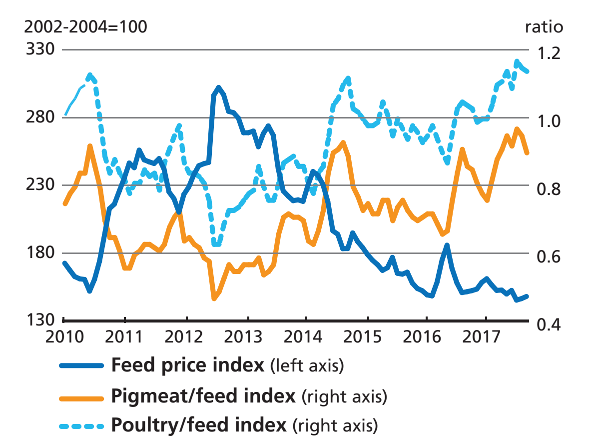
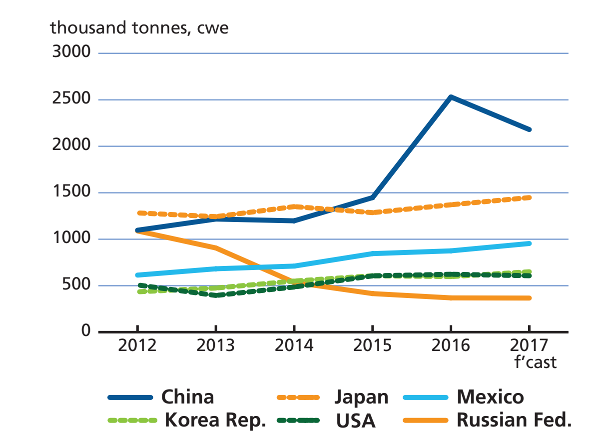


Figure 5. Pigmeat: Major importers



Imports are also expected to decline in **Viet Nam** and the **Russian Federation.** These reductions are expected to more than compensate increased imports elsewhere, especially by **Mexico, Japan** and the **Republic of Korea,** but also **Chile, Colombia** and the **Philippines**.

Among exporters, the **United States**, **Mexico**, **Canada** and **Chile** are anticipated to increase their deliveries to foreign markets, while the **EU, Brazil** and **Thailand** may face some contraction. Exports by the **United States** are predicted to increase by 8.2 percent, to 2.5 million tonnes, centred on rising trade with Japan, the Republic of Korea and Mexico, among others. In contrast, overall shipments by **Brazil** are set to decline by 2.7 percent to 866 000 tonnes, as softening import demand from China would lead to an overall decline despite higher import orders by the Russian Federation, Angola, Argentina and Uruguay. Exports by the **EU** are also forecast to decline by 9.6 percent to 2.8 million tonnes, mainly due to production constraints and reduced import demand, especially from China.

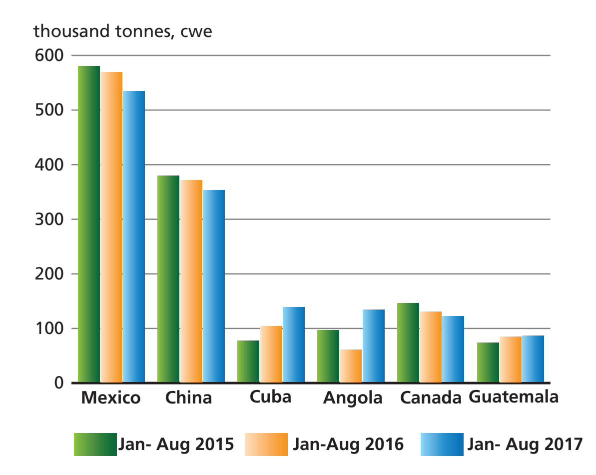
POULTRY MEAT

Production: marginal expansion for the second year in a row

World poultry meat output in 2017 is projected to record a growth of 0.9 percent, or 1.1 million tonnes, to 118.2 million tonnes. Outbreaks of HPAI in 2016/17 significantly influenced the global poultry outlook in 2017. In **China**, closure of the live-bird market to contain the spread of HPAI, along with limited availability of grandparent stock, is expected to prompt its poultry output to drop by 5.2 percent to 16.3 million tonnes in 2017, the lowest level since 2009. Excluding China, aggregate growth in poultry output of the rest of the world would be around 2 percent. The spread of HPAI appears to have had a limited impact on poultry meat output in the EU, which saw a 4 percent growth in 2016 and is now forecast to progress by a further 1 percent to 14.8 million tonnes in 2017.

Much of the expanded poultry output is anticipated to come from the **United States**, **Brazil**, the **EU**, the **Russian Federation, India, Thailand** and **Mexico.** In the **United States**, genetic improvements that favour producing larger birds and raising production efficiencies have bolstered poultry meat output, which is now expected to grow by 1.8 percent in 2017 to a record of almost 22 million tonnes. Production is expected to grow by 2.6 percent in **Brazil,** fuelled by competitive production costs, stable feed prices and growing external demand, as it is an HPAI-free country. A sizeable increase of production is also forecast in **India**, as the sector continues to expand in response to a growing domestic demand, driven by an increasingly urbanized population.

Figure 6. Poultry meat exports: US major destinations



Slow trade growth

Trade in poultry meat in 2017 is forecast to grow by 2 percent, to 13.1 million tonnes, far slower than the 4.6 percent growth seen last year. Imports are anticipated to increase in **Angola**, **Cuba**, **Japan**, **Iraq** and the **United Arab Emirates**. In **Japan,** the increase reflects a growing demand for value-added products, mainly sourced from Thailand, an emerging player in value-added, ready-to-eat poultry products. By contrast, poultry imports are anticipated to decline in the **EU**, **China**, **Viet Nam**, **Mexico**, **Saudi Arabia** and the **Philippines**. The **EU** is expected to see some declines in poultry imports from Brazil and Thailand, which are attributed to voluntary suspension of exports by Brazil to EU member states and Thailand's preference to export more to Asian markets. In **China**, high poultry meat prices have weighed on consumer demand, which, in turn, is likely to lower imports. Larger domestic supplies are behind the expected decline in imports by **Viet Nam**.

On the export side, the **United States**, **Thailand**, **Brazil**, **Ukraine**, **Argentina**, the **Russian Federation**, and **China** are expected to account for most of the increase in shipments**.** Competitive international prices, increased output and HPAI-free status since August 2017 have enabled the **United States** to boost its exports, especially to Cuba, Angola and South Africa. However, its shipments to Mexico, Canada and China might fall. The **Islamic Republic of Iran, Chile** and the **EU** are likely to see their export declines.

OVINE MEAT

Production continued modest growth

Ovine meat production is forecast to increase by a modest 0.6 percent, to 14.5 million tonnes, confirming a trend of small year-to-year gains. Asia and Africa account for 80 percent of production, and where traditional systems are largely dominant. **China, India, Pakistan, Nigeria, Algeria** and countries of sub-Saharan Africa (SSA) are among the largest ovine meat producers, but output in Oceania continues to play the most critical role in world trade. In 2017, as in the preceding two years, outputs in both **Australia** and **New Zealand** have come under pressure which may depress their joint output by as much as 3.8 percent, despite a positive performance in the first half of 2017. The contraction is expected to arise from the process of herd rebuilding, which reduced the number of lambs available for slaughtering. Meanwhile, in the **EU**, output is projected to grow by 2.6 percent.

Trade to contract marginally

World trade in ovine meat is forecast to fall marginally in 2017, to 905 000 tonnes, 0.5 percent less than in 2016. The small decline principally reflects a nearly 2 percent decrease of exports from **Australia** and **New Zealand**, primarily due to supply constraints. Import demand is expected to rise slightly across main markets, especially in **China**, **Saudi Arabia** and **Malaysia**, but to fall in the **EU**.

MEAT: MAJOR POLICY DEVELOPMENTS MID-MAY TO MID-OCTOBER 2017*

COUNTRY	PRODUCT	DATE	POLICY CATEGORY/INSTRUMENT	DESCRIPTION
Argentina	All	May-17	Free Trade Agreement	Ratified the Free Trade Agreement between Egypt and Mercosur (South American Common Market), signed in 2010, as the final member country to approve the agreement. The FTA will reduce custom tariffs between the two parties by 90 percent and cancel custom duties on agriculture products, including meat and meat products.
Belarus	All	Jul-17	Trade agreement	Signed a protocol for delivering frozen beef and poultry meat to China and a memorandum of understanding with the General Administration of Quality Supervision, Inspection and Quarantine in China on cooperation in providing safety when importing and exporting food products.
Canada	All	Aug-17	Free trade agreement	Issued a customs notice on 1 August 2017 to implement the Canada-Ukraine Free Trade Agreement (CUFTA), under which tariffs will be eliminated on 99.9 percent of agricultural imports from Ukraine, excluding supply-managed products.
China (mainland)	Bovine meat	Jul-17	Import ban lifted	Announced the lifting of a 13-year import ban on some US bovine meat products. The ban had been introduced in 2003 due to concerns over the spread of an outbreak of bovine spongiform encephalopathy (BSE) or mad cow disease.
China (Hong Kong – SAR)	Poultry meat	May-17	Import ban	Banned the imports of poultry meat and products (including poultry eggs) from the Democratic Republic of the Congo, due to outbreaks of highly pathogenic H5 avian influenza.
	All	Jul-17	Food safety standards	Launched a Strategy and Action Plan on Antimicrobial Resistance (2017–2022) to combat the threat of growing antimicrobial resistance (AMR) in the community. The plan calls for strengthening monitoring and control of the use of veterinary drugs in food animals.
China (Taiwan province of China)	Bovine meat	Sep-17	Import ban lifted	Lifted an import ban on Japanese bovine meat exports. The ban, in existence since 2001, was introduced following the outbreak of bovine spongiform encephalopathy.
Colombia	Bovine meat	Jul-17	Export limitation	Suspended exports of bovine meat to the Russian Federation, Chile and Peru after discovering an outbreak of foot-and-mouth disease.
Egypt	Bovine meat	Aug-17	Import ban lifted	Lifted a ban on the import of Irish meat, introduced 20 years ago following an outbreak of bovine spongiform encephalopathy.
European Union	All	Sep-17	Free Trade Agreement	Approved the Canada-EU Trade Agreement which entered into force provisionally on 21 September 2017 after its approval by EU Member States, expressed in the Council, and by the European Parliament. Under the agreement, the EU will grant Canada tariff rate quotas (TRQs) over six years for almost 50 000 metric tonnes (MT) for beef, 3 000 MT for bison, and 75 000 MT for pigmeat. For Canadian beef exported to the EU within the existing high-quality beef quota, the duty will drop from 20 percent to zero. All beef imports to the EU will continue to be subject to EU requirements regarding growth promotants, antimicrobial treatments and sanitary inspection equivalence.
India	Bovine meat	May-17	State Market Intervention	Imposed a ban on the sale and purchase of cattle for slaughter in all animal markets.
Japan	Bovine meat	Jul-17	Tariff	Raised tariffs on frozen beef from 38.5 percent to 50 percent – from 1 August until the end of March next year to protect domestic producers from countries without free trade agreements.
Kenya	Poultry meat	Aug-17	Import ban lifted	Partially lifted the ban on poultry meat from three large Ugandan export firms after an eight-month embargo imposed, following an outbreak of avian influenza disease.

COUNTRY	PRODUCT	DATE	POLICY CATEGORY/INSTRUMENT	DESCRIPTION
Republic of Korea	Poultry meat	Aug-17	Import ban lifted	Lifted its ban on imports of US poultry and poultry products, including fresh eggs. The ban had been imposed in response to a recent detection of highly pathogenic avian influenza (HPAI).
	Pigmeat	Sep-17	Market access	Authorized imports of pigmeat from three plants in the Brazilian state of Santa Catarina for the first time.
Namibia	Poultry meat	Jun-17	Import ban	Imposed a ban on poultry imports from South Africa, due to an outbreak of HPAI.In July however, conditions have been eased.
Oman	Poultry meat	Jul-17	Import ban lifted	Lifted a ban on imports of poultry and poultry products from the Netherlands, Denmark, Ukraine, Greece, Macedonia, Bosnia and Herzegovina, Spain and Kuwait. The ban had been introduced in the aftermath of outbreaks of HPAI.
	Poultry meat	Sep-17	Import ban	Banned import of poultry meat from the Philippines, Laos, South Africa, Togo and Zimbabwe according to a ministerial decision.
Philippines	All	Jul-17	Import ban	Temporarily banned all meat imports from Brazil after nearly 500 kg of a recent shipment tested positive for salmonella.
Russian Federation	All	Jun-17	Import ban extended	Extended the ban on the import of agricultural products until end of 2018. This includes meat and meat products from the countries that applied economic sanctions against the Russian Federation.
	All	Aug-17	Tariff rate quota	Established tariff-rate quotas (TRQs) for import of certain agricultural goods into the Customs Territory of the Eurasian Economic Union (EAEU) and respective volumes for import of meat and meat products. The TRQ volumes for the Russian Federation, Belarus and Kazakhstan are unchanged from 2016.
Rwanda	Poultry meat	Jun-17	Import ban	Banned importation of poultry products, including chicken, eggs and chicken meat, from South Africa and Zimbabwe, following an outbreak of HPAI.
Saudi Arabia	Poultry meat	May-17	Import ban	Banned poultry meat imports from a Brazilian company after inspections uncovered public health concerns, unsanitary conditions and animal health issues. This is the fifth Brazilian enterprise banned in the Kingdom due to similar safety concerns.
South Africa	Poultry meat	Jul-17	Export limitation	Suspended exports of live birds, poultry meat, table eggs and other unprocessed poultry product, due to an outbreak of HPAI, to southern African countries, including Botswana, Malawi, Mozambique, Namibia, Zambia and Zimbabwe.
Tanzania	Pigmeat	Jun-17	Import ban	Banned importation of live pigs and their products for one year, following an outbreak of Africa swine fever (ASF) in some regions of the country.
United Arab Emirates	Poultry meat	Aug-17	Import ban	Restricted imports from an affected province of the Philippines following an outbreak of HPAI.
United States	Bovine meat	Jun-17	Import ban	Halted imports of fresh beef from Brazil over recurring safety concerns.

* A collection of major dairy policy developments starting in January 2012 is available at: http://www.fao.org/economic/est/est-commodities/commodity-policy-archive/en/?groupANDcommodity=Milk,%20Dairy%20products

APPENDIX TABLE 13: TOTAL MEAT STATISTICS[1]
(thousand tonnes, carcass weight equivalent)

	Production		Imports		Exports		Utilization	
	2016 *estim.*	2017 *f'cast*	2016 *estim.*	2017 *f'cast*	2016 *estim.*	2017 *f'cast*	2016 *estim.*	2017 *f'cast*
ASIA	**133 231**	**134 019**	**17 290**	**17 305**	**4 177**	**4 305**	**146 386**	**147 013**
China	81 942	81 834	5 776	5 486	538	555	87 190	86 775
India	6 987	7 166	1	1	1 665	1 717	5 323	5 450
Indonesia	3 471	3 486	170	196	5	5	3 637	3 678
Iran, Islamic Republic of	2 667	2 690	122	136	86	68	2 703	2 758
Japan	3 987	3 991	3 292	3 478	15	16	7 278	7 466
Korea, Republic of	2 454	2 448	1 239	1 292	40	13	3 663	3 716
Malaysia	1 877	1 902	338	333	65	67	2 150	2 169
Pakistan	3 252	3 285	33	34	66	66	3 219	3 254
Philippines	3 493	3 612	516	522	11	11	3 998	4 123
Saudi Arabia	884	918	1 092	1 072	103	103	1 873	1 887
Singapore	116	118	365	374	35	32	447	460
Thailand	3 188	3 333	21	20	1 020	1 102	2 193	2 235
Turkey	3 413	3 565	9	7	343	365	3 082	3 207
Viet Nam	4 895	4 985	1 550	1 563	32	37	6 414	6 511
AFRICA	**17 846**	**17 909**	**2 718**	**2 735**	**272**	**270**	**20 293**	**20 374**
Algeria	752	760	85	90	1	1	835	849
Angola	289	294	369	446	-	-	658	740
Egypt	2 417	2 445	358	313	9	7	2 767	2 751
Nigeria	1 446	1 441	3	3	1	1	1 449	1 443
South Africa	3 267	3 242	626	617	168	168	3 726	3 691
CENTRAL AMERICA	**9 415**	**9 648**	**3 228**	**3 371**	**549**	**584**	**12 094**	**12 435**
Cuba	337	349	288	352	-	-	626	701
Mexico	6 614	6 814	2 063	2 126	325	348	8 352	8 592
SOUTH AMERICA	**42 233**	**43 038**	**1 103**	**1 157**	**8 469**	**8 546**	**34 867**	**35 649**
Argentina	5 352	5 524	46	55	454	505	4 944	5 074
Brazil	26 356	26 893	70	63	6 896	6 935	19 530	20 022
Chile	1 477	1 469	495	522	335	327	1 637	1 664
Colombia	2 634	2 700	158	181	14	15	2 777	2 866
Uruguay	657	669	55	57	395	404	317	322
Venezuela	1 540	1 524	161	158	-	-	1 701	1 682
NORTH AMERICA	**49 225**	**50 760**	**2 825**	**2 808**	**9 004**	**9 396**	**43 056**	**44 145**
Canada	4 595	4 734	735	726	1 838	1 865	3 478	3 585
United States of America	44 629	46 025	2 078	2 071	7 166	7 531	39 567	40 548
EUROPE	**63 026**	**63 159**	**2 917**	**2 865**	**5 875**	**5 688**	**60 073**	**60 336**
Belarus	1 167	1 177	47	52	307	303	907	926
European Union	48 063	48 039	1 337	1 259	5 002	4 740	44 398	44 558
Russian Federation	9 634	9 881	1 073	1 080	215	243	10 497	10 718
Ukraine	2 380	2 256	94	105	272	315	2 202	2 047
OCEANIA	**6 311**	**6 282**	**482**	**489**	**2 814**	**2 757**	**3 992**	**4 021**
Australia	4 423	4 426	246	253	1 852	1 822	2 829	2 863
New Zealand	1 379	1 347	76	77	958	932	498	492
WORLD	**321 288**	**324 814**	**30 563**	**30 729**	**31 159**	**31 546**	**320 761**	**323 972**
Developing countries	199 248	201 132	21 206	21 249	13 455	13 692	207 027	208 671
Developed countries	122 040	123 683	9 357	9 480	17 705	17 855	113 735	115 301
LIFDCs	23 530	23 763	1 302	1 274	1 892	1 952	22 941	23 085
LDCs	10 538	10 612	1 321	1 402	23	22	11 835	11 992

[1] including "other meat"

APPENDIX TABLE 14: **BOVINE MEAT STATISTICS**
(thousand tonnes, carcass weight equivalent)

	Production		**Imports**		**Exports**		**Utilization**	
	2016 *estim.*	**2017** *f'cast*	**2016** *estim.*	**2017** *f'cast*	**2016** *estim.*	**2017** *f'cast*	**2016** *estim.*	**2017** *f'cast*
ASIA	**18 257**	**18 523**	**4 855**	**5 091**	**1 881**	**1 924**	**21 238**	**21 697**
China	7 015	7 086	1 404	1 491	33	27	8 356	8 560
India	2 642	2 674	-	-	1 638	1 690	1 004	984
Indonesia	510	505	154	181	-	-	664	686
Iran, Islamic Republic of	195	205	115	127	4	5	306	327
Japan	465	460	706	764	3	3	1 202	1 228
Korea, Republic of	277	282	451	471	7	6	721	737
Malaysia	31	32	202	195	10	9	224	218
Pakistan	1 759	1 789	4	4	34	35	1 729	1 758
Philippines	310	313	154	158	3	3	461	468
AFRICA	**6 300**	**6 277**	**659**	**625**	**115**	**116**	**6 844**	**6 786**
Algeria	137	138	78	84	-	-	215	222
Angola	111	113	70	75	-	-	181	188
Egypt	923	930	340	296	6	5	1 257	1 221
South Africa	952	902	26	26	55	58	922	870
CENTRAL AMERICA	**2 568**	**2 611**	**390**	**401**	**337**	**358**	**2 620**	**2 654**
Mexico	1 880	1 915	206	209	165	176	1 921	1 948
SOUTH AMERICA	**15 309**	**15 626**	**420**	**415**	**2 614**	**2 666**	**13 115**	**13 376**
Argentina	2 650	2 760	-	-	234	266	2 416	2 494
Brazil	9 284	9 450	58	52	1 617	1 641	7 725	7 861
Chile	215	210	277	285	10	11	482	484
Colombia	786	814	4	4	13	14	777	804
Uruguay	550	560	6	6	375	383	181	183
Venezuela	522	524	54	50	-	-	576	574
NORTH AMERICA	**12 632**	**13 269**	**1 479**	**1 438**	**1 597**	**1 691**	**12 469**	**13 037**
Canada	1 130	1 160	259	241	394	405	987	991
United States of America	11 502	12 109	1 217	1 194	1 203	1 286	11 479	12 043
EUROPE	**10 494**	**10 480**	**837**	**830**	**496**	**526**	**10 834**	**10 784**
European Union	7 773	7 795	326	309	297	327	7 802	7 777
Russian Federation	1 605	1 581	427	433	42	42	1 990	1 972
Ukraine	385	375	2	2	24	34	364	344
OCEANIA	**2 753**	**2 719**	**54**	**53**	**1 882**	**1 837**	**938**	**937**
Australia	2 117	2 095	15	15	1 344	1 317	802	795
New Zealand	616	604	12	11	535	517	92	98
WORLD	**68 312**	**69 505**	**8 693**	**8 853**	**8 922**	**9 118**	**68 059**	**69 270**
Developing countries	41 988	42 597	5 644	5 795	4 946	5 063	42 659	43 329
Developed countries	26 324	26 908	3 049	3 058	3 976	4 055	25 399	25 941
LIFDCs	9 818	9 880	111	106	1 798	1 859	8 131	8 127
LDCs	3 531	3 544	133	138	4	4	3 661	3 678

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

	Production		Imports		Exports		Utilization	
	2016 *estim.*	**2017** *f'cast*	**2016** *estim.*	**2017** *f'cast*	**2016** *estim.*	**2017** *f'cast*	**2016** *estim.*	**2017** *f'cast*
ASIA	**8 531**	**8 621**	**545**	**552**	**37**	**37**	**9 039**	**9 136**
Bangladesh	216	218	-	-	-	-	216	218
China	4 372	4 443	245	248	1	1	4 616	4 690
India	728	725	-	-	21	22	707	703
Iran, Islamic Republic of	295	296	3	5	-	-	298	301
Pakistan	477	478	-	-	7	6	470	472
Saudi Arabia	133	132	45	47	2	2	176	177
Turkey	380	382	1	1	-	-	381	383
AFRICA	**2 887**	**2 901**	**32**	**30**	**32**	**31**	**2 887**	**2 900**
Algeria	313	316	4	4	-	-	317	320
Nigeria	387	385	-	-	-	-	387	385
South Africa	213	216	9	8	1	1	221	223
Sudan	365	362	-	-	6	6	360	357
CENTRAL AMERICA	**123**	**124**	**20**	**20**	**-**	**-**	**143**	**144**
Mexico	94	95	10	10	-	-	104	105
SOUTH AMERICA	**311**	**316**	**6**	**6**	**15**	**16**	**303**	**306**
Brazil	118	120	6	6	-	-	124	126
NORTH AMERICA	**97**	**96**	**124**	**133**	**3**	**3**	**217**	**226**
United States of America	76	75	104	112	3	3	177	184
EUROPE	**1 290**	**1 318**	**173**	**153**	**24**	**36**	**1 439**	**1 434**
European Union	918	942	161	142	16	28	1 063	1 055
Russian Federation	224	225	3	2	-	-	227	227
OCEANIA	**1 143**	**1 099**	**27**	**25**	**798**	**781**	**373**	**344**
Australia	655	635	-	-	428	419	227	216
New Zealand	488	464	3	3	370	362	121	105
WORLD	**14 383**	**14 476**	**928**	**920**	**910**	**905**	**14 400**	**14 491**
Developing countries	11 852	11 962	607	610	84	84	12 375	12 488
Developed countries	2 530	2 513	320	310	825	820	2 025	2 003
LIFDCs	4 181	4 194	26	23	55	55	4 152	4 162
LDCs	1 624	1 636	7	7	17	16	1 614	1 627

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

	Production		Imports		Exports		Utilization	
	2016 *estim.*	2017 *f'cast*	2016 *estim.*	2017 *f'cast*	2016 *estim.*	2017 *f'cast*	2016 *estim.*	2017 *f'cast*
ASIA	**63 630**	**64 462**	**4 967**	**4 727**	**192**	**205**	**68 449**	**68 987**
China	51 856	52 511	2 530	2 180	102	108	54 324	54 582
India	357	358	1	1	-	-	357	359
Indonesia	782	784	7	5	-	-	789	789
Japan	1 279	1 275	1 371	1 448	3	3	2 636	2 726
Korea, D.P.R.	101	99	3	4	-	-	104	103
Korea, Republic of	1 266	1 305	623	650	2	2	1 902	1 951
Malaysia	218	218	30	31	5	6	242	244
Philippines	1 866	1 950	115	128	3	3	1 978	2 075
Thailand	940	945	2	2	28	25	915	922
Viet Nam	3 665	3 710	56	46	31	36	3 689	3 720
AFRICA	**1 383**	**1 399**	**268**	**264**	**27**	**27**	**1 624**	**1 636**
Madagascar	58	57	-	-	-	-	58	57
Nigeria	256	255	1	-	-	-	257	255
South Africa	254	261	31	32	23	24	262	269
Uganda	118	118	1	1	-	-	118	118
CENTRAL AMERICA	**1 920**	**1 974**	**1 099**	**1 189**	**172**	**184**	**2 847**	**2 979**
Cuba	214	223	22	23	-	-	236	246
Mexico	1 376	1 420	875	954	150	162	2 101	2 212
SOUTH AMERICA	**5 917**	**5 992**	**273**	**319**	**1 058**	**1 043**	**5 133**	**5 268**
Argentina	519	549	35	45	2	2	552	592
Brazil	3 700	3 725	2	2	890	866	2 812	2 861
Chile	508	510	75	93	163	172	420	431
Colombia	349	365	66	81	-	-	415	446
Venezuela	170	162	33	33	-	-	203	195
NORTH AMERICA	**13 400**	**13 852**	**845**	**860**	**3 552**	**3 749**	**10 736**	**10 905**
Canada	2 081	2 130	243	249	1 264	1 274	1 065	1 105
United States of America	11 319	11 722	598	607	2 287	2 475	9 667	9 796
EUROPE	**29 061**	**28 796**	**501**	**506**	**3 233**	**2 962**	**26 329**	**26 341**
Belarus	398	412	9	10	41	47	366	375
European Union	23 679	23 419	13	14	3 107	2 810	20 586	20 623
Russian Federation	3 403	3 509	369	367	49	58	3 724	3 818
Serbia	330	335	28	35	17	22	341	348
Ukraine	760	623	4	4	4	7	761	620
OCEANIA	**524**	**540**	**295**	**302**	**35**	**39**	**782**	**808**
Australia	385	399	212	218	34	37	562	585
Papua New Guinea	72	71	8	8	-	-	80	79
WORLD	**115 836**	**117 015**	**8 247**	**8 167**	**8 269**	**8 209**	**115 899**	**116 924**
Developing countries	71 666	72 646	5 258	5 072	1 446	1 457	75 533	76 260
Developed countries	44 170	44 369	2 989	3 095	6 823	6 753	40 366	40 664
LIFDCs	1 603	1 605	149	145	3	3	1 749	1 748
LDCs	1 837	1 855	160	161	1	1	1 997	2 016

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

	Production		Imports		Exports		Utilization	
	2016 *estim.*	2017 *f'cast*	2016 *estim.*	2017 *f'cast*	2016 *estim.*	2017 *f'cast*	2016 *estim.*	2017 *f'cast*
ASIA	**40 857**	**40 458**	**6 873**	**6 884**	**2 043**	**2 115**	**45 678**	**45 210**
China	17 214	16 311	1 591	1 562	387	405	18 419	17 469
India	3 111	3 260	-	-	4	3	3 107	3 257
Indonesia	2 071	2 090	4	4	-	-	2 074	2 094
Iran, Islamic Republic of	2 160	2 172	-	-	78	58	2 082	2 114
Japan	2 230	2 243	1 179	1 228	9	9	3 390	3 462
Korea, Republic of	900	850	144	149	31	4	1 008	995
Kuwait	50	53	129	133	-	-	179	186
Malaysia	1 625	1 650	73	72	50	52	1 648	1 670
Saudi Arabia	638	670	903	885	70	70	1 471	1 485
Singapore	96	98	176	182	13	14	258	266
Thailand	2 056	2 194	3	2	955	1 042	1 108	1 138
Turkey	1 913	1 963	-	-	327	342	1 586	1 621
Yemen	144	137	78	83	-	-	222	220
AFRICA	**5 835**	**5 890**	**1 727**	**1 782**	**90**	**87**	**7 471**	**7 585**
Angola	35	33	218	288	-	-	253	321
South Africa	1 825	1 840	560	551	81	79	2 304	2 312
CENTRAL AMERICA	**4 684**	**4 818**	**1 701**	**1 742**	**38**	**39**	**6 347**	**6 521**
Cuba	35	36	242	303	-	-	277	339
Mexico	3 161	3 281	959	940	8	9	4 112	4 212
SOUTH AMERICA	**20 488**	**20 896**	**402**	**415**	**4 715**	**4 754**	**16 174**	**16 557**
Argentina	1 984	2 014	11	9	187	205	1 808	1 818
Brazil	13 223	13 567	3	3	4 364	4 403	8 862	9 167
Chile	728	722	143	144	153	135	718	731
Venezuela	840	830	74	75	-	-	914	905
NORTH AMERICA	**22 870**	**23 316**	**368**	**368**	**3 833**	**3 935**	**19 418**	**19 760**
Canada	1 364	1 423	213	215	179	186	1 386	1 447
United States of America	21 506	21 893	151	149	3 654	3 749	18 028	18 308
EUROPE	**20 988**	**21 372**	**1 240**	**1 209**	**2 037**	**2 079**	**20 195**	**20 502**
European Union	14 651	14 841	737	693	1 500	1 492	13 888	14 042
Russian Federation	4 312	4 476	226	230	124	142	4 419	4 564
Ukraine	1 190	1 213	85	97	244	273	1 032	1 037
OCEANIA	**1 459**	**1 492**	**102**	**105**	**57**	**60**	**1 504**	**1 537**
Australia	1 244	1 275	18	18	34	36	1 229	1 257
New Zealand	187	189	1	1	23	24	165	166
WORLD	**117 181**	**118 241**	**12 412**	**12 506**	**12 814**	**13 069**	**116 787**	**117 672**
Developing countries	69 662	69 846	9 606	9 682	6 877	6 986	72 390	72 526
Developed countries	47 519	48 395	2 805	2 824	5 937	6 083	44 397	45 146
LIFDCs	6 224	6 379	988	970	31	30	7 180	7 319
LDCs	2 862	2 894	994	1 069	2	2	3 854	3 962

APPENDIX TABLE 25: SELECTED INTERNATIONAL MEAT PRICES

Period	Bovine meat prices			Ovine meat price	Pig meat prices			Poultry meat prices	
	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
2015	4 638	6 201	4 130	3 641	2 576	2 499	1 582	1 003	1 642
2016	4 059	5 569	3 836	3 571	2 424	2 143	1 682	914	1 532
Monthly									
2016 – October	3 977	5 602	4 027	4 178	2 551	2 509	1 758	902	1 588
2016 – November	4 108	5 799	4 144	3 925	2 515	2 630	1 707	903	1 580
2016 – December	3 886	5 745	3 889	3 750	2 495	2 284	1 680	855	1 553
2017 – January	4 098	5 613	3 855	3 611	2 507	2 295	1 675	871	1 635
2017 – February	4 315	5 592	3 920	3 740	2 445	2 330	1 667	880	1 683
2017 – March	4 425	5 791	3 972	3 723	2 465	2 528	1 746	910	1 683
2017 – April	4 430	5 658	4 013	4 035	2 432	2 722	1 901	994	1 679
2017 – May	4 532	5 704	4 076	4 205	2 472	2 698	2 021	1 019	1 674
2017 – June	4 681	5 582	4 083	4 709	2 534	2 628	2 086	1 075	1 647
2017 – July	4 645	5 772	4 101	4 898	2 606	2 537	2 035	1 057	1 578
2017 – August	4 209	5 775	4 073	4 933	2 638	2 437	2 064	1 057	1 642
2017 – September	4 251	6 030	4 089	5 113	2 652	2 413	1 993	1 060	1 625
2017 – October	4 360	6 060	4 080	5 035	2 660	2 390	1 826	1 063	1 617

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 carcass grade E

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

Prices for the two most recent months may be estimates and subject to revision.

APPENDIX TABLE 26: **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
2015	168	213	157	126	168
2016	156	191	154	123	156
Monthly					
2016 – October	162	193	180	131	158
2016 – November	163	200	169	130	158
2016 – December	157	191	162	125	153
2017 – January	159	193	156	125	160
2017 – February	161	197	161	125	163
2017 – March	165	202	161	130	165
2017 – April	169	201	174	137	170
2017 – May	173	205	182	141	171
2017 – June	176	206	203	143	173
2017 – July	175	208	211	142	167
2017 – August	174	202	213	142	172
2017 – September	174	204	221	140	171
2017 – October	173	206	217	134	170

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.