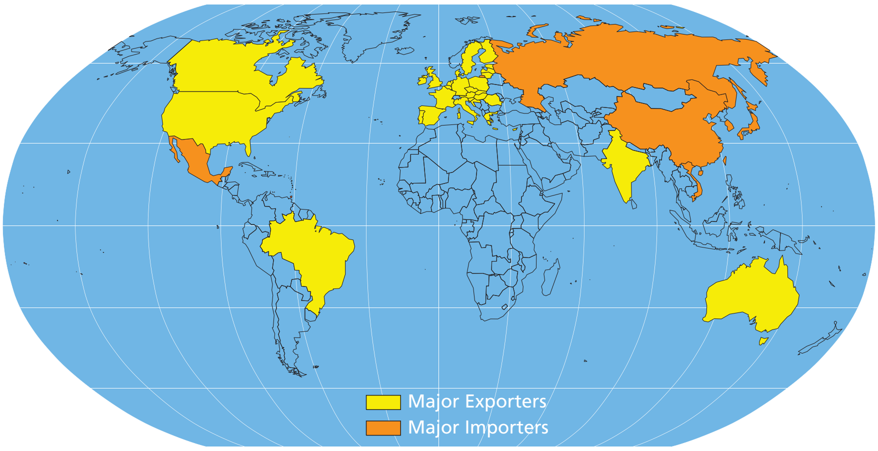
MEAT AND MEAT PRODUCTS

Major Meat Exporters and Importers



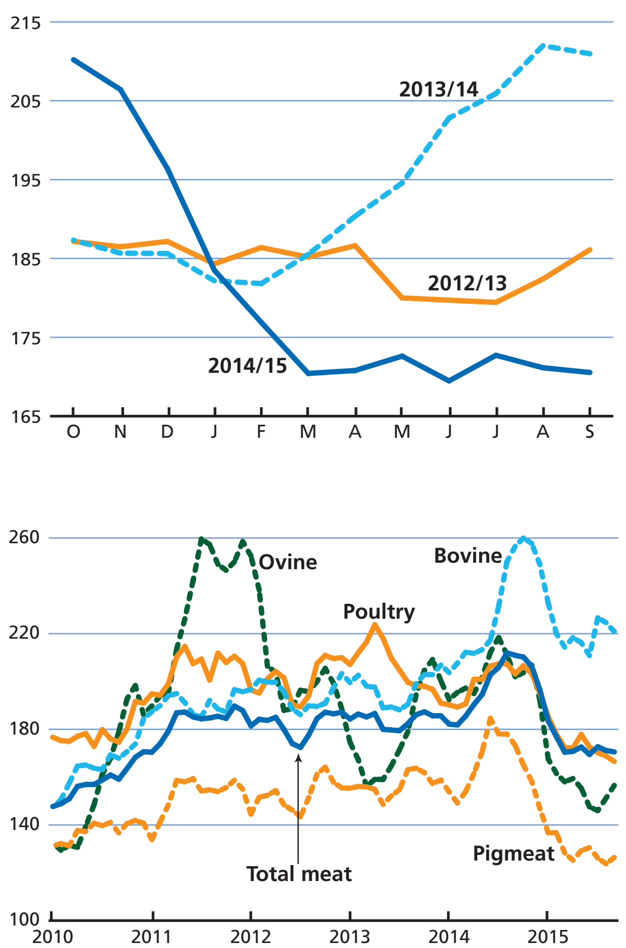
After a period of decline, the **FAO Meat Price Index** stabilized between April and September, averaging 171 points. The upturn was the result of higher bovine meat prices, as those of the other categories of meat declined. Meat prices remain substantially below last year, having shed 40 points, or 19 percent, compared to September 2014.

Modest production expansion; trade growth may stall

World meat production is anticipated to record a modest 1.1 percent expansion in 2015, to 318.8 million tonnes, with the largest increases expected in the EU, the United States and the Russian Federation. The poultry sector is forecast to drive the global expansion, followed by pig meat. Only modest gains are foreseen in bovine and ovine meat production.

Global meat trade is forecast to decline slightly in 2015, by 0.6 percent, to 30.5 million tonnes. This would represent a marked slowdown from the 3 percent growth recorded last year. Projected trade trends diverge across meat sectors, with an expansion forecast for bovine meat and a decline anticipated for the other categories of meat. Poultry remains the main traded meat product, followed by bovine, pig and ovine meat, respectively.

Figure 1. Prices stabilize (2002-2004=100)



BOVINE MEAT

Production up slightly

Bovine meat production in 2015 is forecast to increase by

Table 1. World meat market at a glance

	2013	2014 *estim.*	2015 *f'cast*	Change: 2015 over 2014
		million tonnes		%
WORLD BALANCE				
Production	**311.3**	**315.3**	**318.8**	**1.1**
Bovine meat	68.0	68.1	68.3	0.3
Poultry meat	108.6	110.5	112.1	1.5
Pigmeat	115.0	117.3	118.8	1.3
Ovine meat	13.9	13.9	14.0	0.9
Trade	**29.7**	**30.6**	**30.5**	**-0.6**
Bovine meat	8.9	9.6	9.7	0.5
Poultry meat	12.4	12.7	12.6	-1.0
Pigmeat	7.1	7.0	7.0	-0.6
Ovine meat	1.0	1.0	1.0	-4.9
SUPPLY AND DEMAND INDICATORS				
Per caput food consumption:				
World (kg/yr)	*43.4*	*43.3*	*43.4*	*0.1*
Trade - share of prod. (%)	*9.5*	*9.7*	*9.6*	*-1.7*
FAO MEAT PRICE INDEX (2002-2004=100)	**2013**	**2014**	**2015** *Jan-Sept*	**Change: Jan-Sept 2015 over Jan-Sept 2014 %**
	184	198	178	-11.8

0.3 percent, to 68.3 million tonnes – prolonging the trend of modest growth evident for several years.

In *South America*, inadequate rain has impinged on cattle availabilities for slaughter in many countries. In **Brazil**, two years of unusually dry weather have affected cattle condition and calf development – causing prices to rise and encouraging producers to retain stock. As a consequence, in 2015, bovine meat production is anticipated to fall by 3 percent to 9.4 million tonnes. In **Argentina**, little growth in production is anticipated, as adverse weather conditions have weighed on the calf crop, while Government export restrictions limit the extent to which sales abroad can be increased. In neighbouring **Paraguay** and **Uruguay**, production growth is forecast, supported by productivity increases and spurred by international demand and attractive cattle prices.

In *Asia*, **India** continues to see its industry grow, stimulated by government programmes to utilize male buffalo calves from the country's expanding dairy herd, although it is not clear at this point (September 2015) how a projected slowdown in exports, the main destination for meat produced, may eventually affect production. Output is forecast to drop in the **Republic of Korea**, where improved prices have encouraged herd rebuilding and some small-scale producers have left the industry. Production in **Japan** is also anticipated to fall, due to continued herd reduction, especially dairy cattle, although high prices for *Wagyu* beef have fostered some additional retention of stock. In **China**, a reduction in the size of the national herd is forecast to result in a fall in output. Competition from imports – both live cattle and carcasses – and limited availability of land and fodder supplies, combined with poor profitability in the dairy industry, have prompted a number of smaller scale producers in China to exit livestock production.

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 in a number of countries, including **Morocco** and **Nigeria**. In **Egypt**, increased output is also forecast, supported by government programmes to control foot-and-mouth disease (FMD) and other policies aimed at bolstering red meat production. Meanwhile, some areas of eastern and southern Africa experienced intermittent seasonal rains during the first part of the year, affecting pastures and feed availability. As a consequence, growth may be constrained in those two subregions. Furthermore, outbreaks of foot-and-mouth disease in eastern and central Africa, including **Kenya**, **Uganda** and **Rwanda,** may depress yields.

In *North America*, the **United States** is expected to see bovine meat production stabilize in 2015, as higher slaughter weights, assisted by cheaper feed costs, should largely counterbalance a decline in slaughtered cattle numbers as a result of calves being retained for herd expansion. Output, forecast at 11.1 million tonnes, would still be the lowest since 1994. The long-term decline in the cattle herd in **Canada**, evident since 1992, is expected to persist in 2015, although increased slaughter weights should partly offset its effect on output, which is forecast at 1 million tonnes. In **Mexico,** reduced feed costs are anticipated to lead to higher bovine meat production via increased slaughter weight and continued herd reduction.

In *Oceania*, dry weather, low international milk product prices and strong international demand for bovine meat have led to a surge in production. In **Australia**, strong international prices are expected to foster an increase in slaughtering, further reducing the national herd in 2015, which may fall to a 20-year low. As a result of the culling, output is forecast to reach 2.6 million tonnes, a 5.3 percent increase over 2014 and a third year of exceptionally high performance. Likewise, production in **New Zealand** is foreseen to be substantially higher, reaching 670 000 tonnes, or 3.1 percent more than in 2014, due to both drought during the first part of the year and sharply lower milk payouts to farmers which led to curtailment of dairy herd expansion. In the **Russian Federation**, bovine meat output is forecast at 1.7 million tonnes, the same level as the previous year. In the **EU**, production could rise by 1.7 percent in 2015, mainly owing to retention of male dairy calves for fattening and the culling of dairy cows in some countries. Within the EU, the dairy herd is becoming increasingly important as a source of bovine meat supplies, while the size of the pure beef herd is declining.

Trade: Firm import demand

World trade in bovine meat in 2015 is anticipated to expand by 0.5 percent, to 9.7 million tonnes, a much slower pace than the average rate of 10 percent recorded in the previous two years. Supply limitation is the principal factor behind the anticipated slowdown, as import demand should remain firm in most countries.

Bovine meat imports, particularly by the **United States**, are expected to rise in 2015, assisted by a strong US dollar and limited domestic supply, due to herd rebuilding. Higher levels of purchases are also anticipated for **Japan**, **Malaysia**, **Canada**, the **Republic of Korea** and the **Philippines**. Meanwhile, **Vietnam**, **Chile**, the **Islamic Republic of Iran**, the **Russian Federation**, and **Venezuela** are predicted to import less. After registering substantial growth for a number of years, shipments to **China** are projected to be little changed in 2015, as are those to the **EU**.

Strong overseas deliveries by **Australia** – in particular to the United States – are projected to see it surpassing **India** and **Brazil** to become the largest international supplier of bovine meat in 2015. Favourable market conditions are expected to boost exports from **New Zealand**, **Paraguay**, **Argentina**, **South Africa** and **Canada**. In the case of New Zealand, a reduced rate of retention within the dairy herd, caused by lower milk payouts, combined with drought-related herd culling at the beginning of the year, have contributed to increased shipments. Sales by **India** are predicted to fall by 7 percent, mainly as a result of a substantial drop off in shipments to Vietnam, its main market. Also, **Brazil** may have to cut sales abroad, due to limited supplies of replacement calves and sustained domestic demand for beef. Shipments to Brazil's three main markets, the Russian Federation, China (Hong Kong, SAR) and Venezuela, all contracted during the first half of 2015. Similarly, herd rebuilding and strong domestic demand are anticipated to curb sales by the **United States**. Exports by the **Belarus**, **EU** and **Nicaragua** and are also forecast to be lower in 2015.

PIGMEAT

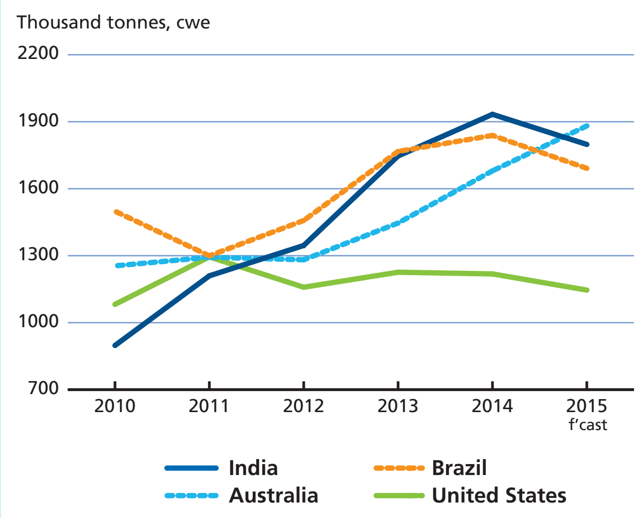
Production to grow in all regions

World production of pigmeat is forecast to grow by 1.3 percent to 118.8 million tonnes in 2015. This would represent a reduced rate of expansion compared with the average of 2.1 percent recorded in the previous two years. Stagnation in **China**, which accounts for almost half the world output, is the main reason for the slowdown. An unfavourable feed-pork price ratio in the country and new environmental regulations have caused farmers to reduce breeding sows, stalling growth. Production in 2015 is projected at 57.1 million tonnes, down 0.2 percent from the previous year. Elsewhere in Asia, **Vietnam**, the **Philippines** and **Indonesia** are expected to boost output. Production in **Japan** and the **Republic of Korea** continues to be affected by last year's outbreaks of porcine endemic diarrhoea (PED), which reduced piglet numbers. Both countries may see production rise only during the latter part of 2015 – resulting in little increase in output for the year as a whole. Recovery from the effects of PED has been faster in the **United States**, where production may finish the year 6.1 percent higher, at 11 million tonnes, and **Mexico**, where production is forecast to rise 3.9 percent to 1.3 million tonnes. In both cases, lower feed prices have encouraged growth. Elsewhere in the *Americas*, a fall in feed costs is anticipated to boost production in **Canada** and **Brazil**. The **EU** is expected to maintain the expansion seen last year, based on both augmentation of the breeding sow herd and heavier slaughter weights. In the **Russian Federation**, the pace of growth in pigmeat production is anticipated to increase, due to investment in, and the growing importance of, large-scale production units.

Pigmeat: Trade to fall for the third year

Trade in pigmeat in 2015 is expected to decline for the third consecutive year, retreating by 0.6 percent to 7 million

Figure 2. Bovine meat exports



tonnes, although the extent of the decrease would be less than in the previous two years. The major factor contributing to the drop is reduced import demand by the **Russian Federation**. In the Russian Federation, increasing domestic production means that the sourcing of external supplies of pigmeat has been declining since 2012, when imports peaked at 1 089 million tonnes. This process was exacerbated in August 2014 by the implementation of country-specific import bans. As a consequence, deliveries to the Federation are projected to be in the order of 297 000 tonnes in 2015, down 45 percent from 2014 and a fall of two-thirds compared with 2012. While overall purchases have been significantly reduced, Russian imports from some countries not subject to the ban have risen, principally Brazil and Belarus, but also Chile and Serbia. Imports by **Japan**, **Vietnam** and **Angola** are also expected to decline. By contrast, a number of countries are anticipated to increase their purchases of pigmeat, including the **United States**, the **Republic of Korea**, **Mexico**, **China** and **Australia**, although not sufficiently to counteract the decline elsewhere.

Apart from the **EU**, all other major exporters – the **United States**, **Canada** and **Brazil** – are forecast to see retrenched shipments in 2015, as a result of an overall weakening of international demand for pigmeat. In the case of the EU, strong growth in production and competitive pricing are anticipated to lead to a 5 percent increase in sale. A more detailed examination of trade data reveals that the affected exporters are adjusting to the ban imposed by the Russian Federation and seeking alternative markets. For example, the EU has reoriented its exports to *Asia*, but also to *Africa*, *Oceania* and *North America*. Similarly, subsequent to the ban, Canada has increased sales to the United States, Mexico, *Oceania* and South Africa.

Figure 3. Pigmeat exports

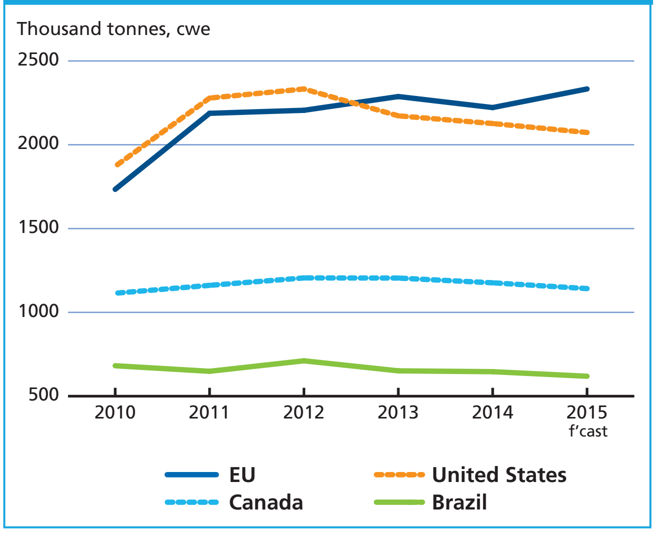
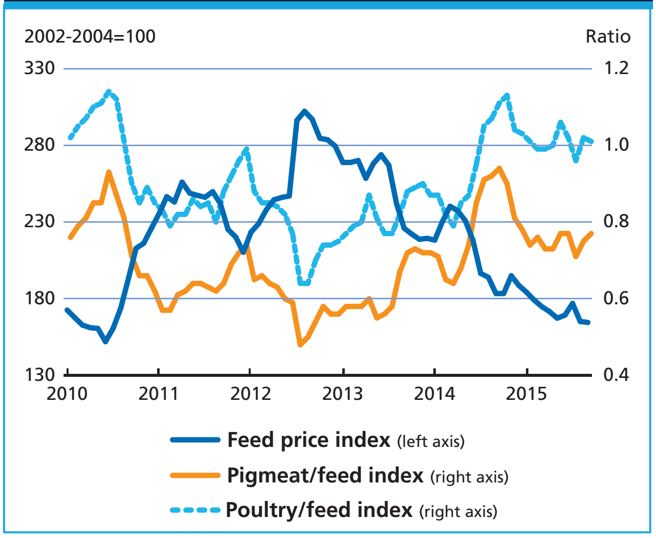


Figure 4. Feed/price relationship relatively stable for pigmeat and poultry producers



POULTRY

Production: China weighs on world growth

Modest growth is foreseen for poultry production in 2015, with output expected to rise by 1.5 percent to 112.1 million tonnes, a rate similar to last year but much slower than the 3 percent per year trend of 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, 2015 production in the country is projected to be unchanged, at 18.5 million tonnes. Excluding China, all the other largest producing countries are expected to register growth, including **Brazil,** the **EU**, the **Russian Federation**, **Mexico**, **India,** the **Islamic Republic of Iran** and **Indonesia**. In the **United States**, the principal producer, outbreaks of highly pathogenic avian influenza (HPAI) are expected to dampen the sector's expansion to only 0.7 percent to reach 20.6 million tonnes in 2015.

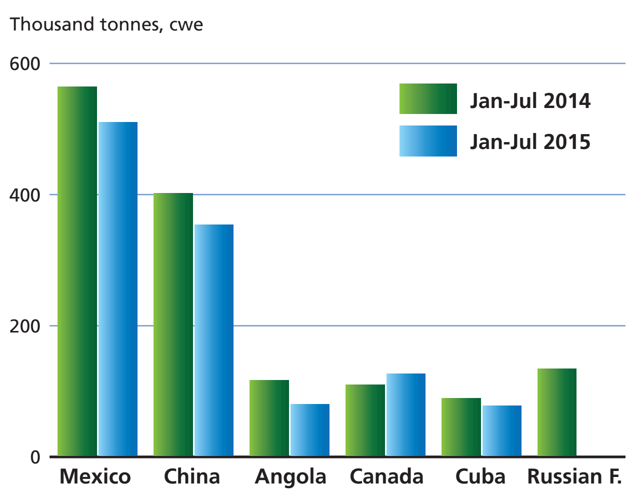
Trade: Set to decline

Trade in poultry in 2015 is expected to decline by 1 percent to 12.6 million tonnes. This would represent the first fall registered since 2009, although the rate of trade growth has been waning since 2012. In general, the stalled expansion in trade is a reflection of augmented production in importing countries, which has curtailed their need for external meat supplies. For 2015, however, outbreaks of HPAI in some areas of the United States from January onwards caused numerous countries to suspend imports. Additionally, sharply reduced purchases by the Russian Federation and Angola, due to changed import regimes, have negatively impacted trade.

The two major poultry meat importers, **China** and **Japan**, are projected to maintain their purchases at similar levels to the previous year, while growth in imports by a number of other major markets is anticipated, including **Mexico**, **Saudi Arabia**, **Vietnam** and **South Africa**. Conversely, imports by the **EU,** the **Russian Federation** and **Angola** are anticipated to decline. In the case of Angola, in January 2015, the government revoked import licenses for a number of products, including chicken parts. Furthermore, at the beginning of the year, it imposed a blanket ban on poultry imports from the United States**,** traditionally its major supplier, following HPAI outbreaks there. As for the Russian Federation, a second year of falling purchases is anticipated, stemming from growth in domestic production and the August 2014 ban on imports from specific countries. In 2013, countries/groupings subject to the ban (mainly the United States and the EU) supplied approximately three-quarters of the Russian Federation's poultry meat imports. As a result, it has been a challenge for the country to identify alternative suppliers. For the first half of 2015, only limited additional sourcing had occurred, mainly from Brazil, Turkey and Belarus. Imports by the EU are also projected to fall, as low feed prices have diminished costs, making external purchases, particularly from Brazil and China, less attractive.

The three leading poultry exporters, **Brazil**, the **United States** and the **EU,** have seen little variation in sales in recent years. This situation is anticipated to change for the United States in 2015, as the HPAI outbreak has caused importers to look for alternative sources of supply. Exports by the United States for the year as a whole are projected to fall by 8 percent, although much will depend on how soon the disease is contained and eradicated, and normal trade patterns are resumed. Some of the United States' main markets have introduced trade bans only on poultry originating from the 13 US states affected by the disease (or affected counties within these states), while still allowing imports from the rest of the country. The difficulties faced by the US are likely to favour some second-tier exporters, such as **Thailand** and **Turkey,** which are expected to record a strong increase in poultry meat shipments. Conversely, **Argentina**, which has also seen substantial export growth in recent years, is facing a decline in sales to Venezuela, its principal market, which may cause its overall exports to fall in 2015.

Figure 5. United States: poultry exports



OVINE MEAT

Production: Limited growth

After stagnating in 2014, production of ovine meat is forecast to show limited growth in 2015, rising by 0.9 percent to 14 million tonnes. Developing countries account for three-quarters of total output, with the largest producers being **China**, **India**, **Nigeria, Sudan** and **Pakistan**. Generally satisfactory pasture conditions have set the basis for output expansion in many of the major producing areas of *Asia* and *Africa*. In *Oceania*, drought-imposed herd reduction and subsequent rebuilding are projected to constrain output in **Australia** and **New Zealand.** In the **EU**, a second year of modest production growth is expected, with output particularly increasing in the United Kingdom and Romania.

Trade: Decline anticipated

World trade in ovine meat is anticipated to contract by almost 5 percent, to 976 000 tonnes, in 2015, reflecting reduced shipments from **Australia** and **New Zealand**, which have entered a phase of flock restocking. As a result of the process, Australia is expected to see exports fall by 4 percent, while New Zealand could experience a 6 percent drop. However, some much smaller-scale exporters, such as **India**, **Pakistan** and **Ethiopia**, could see sales grow.

Reduced world export availabilities are expected to limit import flows, especially to **China**, the **EU**, **Canada** and **Japan**, although countries in the *Near East* the **United States** and **Malaysia** may increase their purchases of ovine meat.

MEAT: MAJOR POLICY DEVELOPMENTS: MAY TO MID SEPTEMBER 2015*

Argentina	Bovine meat	Jun-15	Market Access	Lifted 2012 ban on imports of bovine meat from Brazil. The ban was imposed in response to cases of atypical bovine spongiform encephalopathy (BSE) in Brazil.
Australia	All	Jun-15	Free Trade Agreement	Signed free trade agreement with China. Key outcomes include: elimination of tariffs on bovine meat (currently ranging from 12 to 25 percent) within 9 years; elimination of the 12 percent tariff on bovine offal within 4 to 7 years; elimination of the tariffs on sheepmeat (currently ranging from 12 to 23 percent) within 8 years; elimination of the 18 percent tariff on frozen sheepmeat offal within 7 years; elimination of the 20 percent tariff on goat meat within 8 years; tariffs of up to 20 percent on pork eliminated within 4 years.
	Bovine meat	Jul-15	Health Certification	Signed the Australia-China Live Cattle Export Health Certification Agreement, a health protocol which will enable the export of slaughter cattle to China.
Belarus	Poultry	May-15	Import ban	Banned the import of poultry from parts of the United States and Kazakhstan, following outbreaks highly pathogenic avian influenza (HPAI) in these countries.
Canada	Bovine meat	Jul-15	Free Trade Agreement	Concluded free trade negotiations with the Ukraine which included access for bovine meat and for cattle under 30 months old.
Chile	Bovine meat	May-15	Market Access	Recognized the United States as being a country of negligible risk from BSE. The new classification opens the possibility of negotiating new access for US products in Chile, specifically live cattle.
China	Bovine meat	May-15	Import ban lifted	Lifted a ban on importation of bovine meat from Canada, imposed in February 2015, after Canada reported a case of BSE.
	Bovine meat	May-15	Import ban lifted	Lifted a ban on imports of bovine meat from Brazil, imposed in December 2012 after cases of BSE were discovered there. Importation is allowed only from certified meat processing plant. Eight plants have been approved and more are awaiting approval.
Ecuador	Poultry	May-15	Import ban	Banned importation of all poultry products from the United States, following outbreaks of HPAI in the US.
Indonesia	Bovine meat	Jun-15	Tariff rate quota	Announced that it would issue a quota for the importation of 50 000 head of cattle for slaughter during the third quarter of the year – substantially down from the 250 000-head quota issued for the same period in 2014.
Kazakhstan	All	May-15	Tariff rate quota	Announced the second stage of the 2015 tariff quota allocation, encompassing frozen meat (HS 0202), pigmeat (HS 0203) and poultry meat (HS 0207).
Myanmar	All	Jul-15	Import ban lifted	Approved importation of bovine meat, cattle and poultry meat from Brazil.
Russian Federation	All	May-15	Import ban lifted	Lifted ban of bovine meat, sheepmeat and pigmeat imports from the southern district of Narino in Colombia – imposed in 2009, following an outbreak of FMD.
	Bovine meat	May-15	Import ban	Banned the import of bovine meat from 10 processing plants in Brazil as of 9 June, citing phytosanitary concerns.
	All	Jun-15	Import ban	Extended ban on the importation of agricultural products from the EU, the United States, Canada, Australia and Norway until 5 August 2016.
	All	Aug-15	State market intervention	Approved USD 176 million subsidy on interest payments for short-term loans to develop dairy cattle breeding facilities and livestock production in support of import-substitution goals.
Saudi Arabia	Poultry	Jun-15	Import ban	Banned the importation of poultry from an additional 5 US states (Montana, North Dakota, South Dakota, Wisconsin and Iowa) following outbreaks of HPAI. Imports from a further 8 states (Oregon, California, Washington, Idaho, Minnesota, Missouri, Kansas and Arkansas) had been banned earlier in the year for the same reason.
South Africa	Poultry	Jun-15	Import quota	Agreed to a 65 000-tonne annual quota for the importation of chicken parts from the USA. The quota has not been applied as yet, due to concerns about the presence of HPAI in the USA.
United States	Bovine meat	Jul-15	Import ban lifted	Announced the lifting of a ban on bovine meat imports from northern Argentina and 14 states in Brazil. The ban had been introduced subsequent to an outbreak of FMD in the area in 2001.
	All	Sep-15	Import ban lifted	Opened its market to imports of bovine meat, pigmeat, sheepmeat and goatmeat from Lithuania.

* 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 13: 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	**134 616**	**135 299**	**15 859**	**15 799**	**4 502**	**4 441**	**145 973**	**146 657**
China	88 232	88 088	4 663	4 634	730	632	92 165	92 090
India	6 316	6 461	1	1	1 966	1 836	4 350	4 626
Indonesia	3 340	3 401	110	87	5	5	3 446	3 483
Iran, Islamic Republic of	2 595	2 694	142	84	75	79	2 662	2 699
Japan	3 246	3 236	3 214	3 156	15	14	6 444	6 378
Korea, Republic of	2 232	2 257	1 002	1 094	29	34	3 204	3 317
Malaysia	1 646	1 675	291	313	52	53	1 886	1 935
Pakistan	3 092	3 171	19	24	64	72	3 047	3 122
Philippines	3 135	3 155	440	466	18	18	3 556	3 603
Saudi Arabia	821	829	1 036	1 058	62	66	1 795	1 821
Singapore	118	119	331	342	28	30	421	431
Thailand	2 712	2 795	40	41	851	973	1 901	1 863
Turkey	3 102	3 157	3	5	450	460	2 655	2 703
Viet Nam	4 365	4 415	1 784	1 623	22	26	6 127	6 012
AFRICA	**17 065**	**17 270**	**2 975**	**2 874**	**229**	**287**	**19 812**	**19 856**
Algeria	742	747	102	102	1	1	843	849
Angola	267	274	693	461	-	-	960	735
Egypt	2 097	2 109	426	465	6	9	2 517	2 565
Nigeria	1 464	1 494	4	4	1	1	1 468	1 497
South Africa	2 799	2 816	459	504	148	203	3 109	3 117
CENTRAL AMERICA	**8 915**	**9 059**	**2 820**	**2 918**	**508**	**530**	**11 227**	**11 447**
Cuba	304	303	244	230	-	-	549	533
Mexico	6 227	6 330	1 848	1 946	274	294	7 801	7 982
SOUTH AMERICA	**42 238**	**42 598**	**1 020**	**901**	**8 134**	**8 114**	**35 123**	**35 385**
Argentina	5 116	5 206	14	14	562	524	4 568	4 697
Brazil	26 500	26 560	85	88	6 546	6 491	20 039	20 157
Chile	1 424	1 426	362	305	289	316	1 497	1 415
Colombia	2 460	2 496	134	135	14	9	2 581	2 623
Uruguay	650	683	41	39	352	361	339	361
Venezuela	2 073	2 146	286	217	-	-	2 359	2 362
NORTH AMERICA	**46 595**	**47 331**	**2 775**	**3 147**	**9 252**	**8 769**	**40 118**	**41 709**
Canada	4 382	4 374	769	793	1 717	1 695	3 433	3 472
United States of America	42 212	42 957	1 995	2 343	7 535	7 075	36 672	38 225
EUROPE	**59 569**	**60 788**	**3 781**	**3 215**	**4 796**	**4 889**	**58 554**	**59 114**
Belarus	1 147	1 159	91	82	312	265	926	976
European Union	45 672	46 683	1 296	1 229	4 037	4 173	42 931	43 739
Russian Federation	8 547	8 755	1 885	1 416	143	137	10 289	10 034
Ukraine	2 569	2 555	109	96	206	215	2 473	2 436
OCEANIA	**6 322**	**6 468**	**443**	**492**	**3 223**	**3 438**	**3 542**	**3 522**
Australia	4 500	4 625	222	262	2 251	2 430	2 471	2 456
New Zealand	1 315	1 335	70	79	968	1 005	416	409
WORLD	**315 319**	**318 814**	**29 673**	**29 347**	**30 644**	**30 470**	**314 348**	**317 691**
Developing countries	193 668	194 972	18 596	18 399	13 197	13 144	199 067	200 228
Developed countries	121 651	123 841	11 077	10 948	17 447	17 327	115 280	117 463
LIFDCs	22 204	22 564	1 862	1 945	2 138	2 007	21 927	22 502
LDCs	10 011	10 175	1 682	1 492	11	12	11 683	11 656

[1] Including "other meat".

APPENDIX TABLE 14: **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	**17 972**	**18 069**	**4 617**	**4 516**	**2 185**	**2 069**	**20 413**	**20 554**
China	6 907	6 845	1 189	1 198	43	45	8 074	8 008
India	2 621	2 678	-	1	1 933	1 798	688	880
Indonesia	591	601	99	75	-	1	689	675
Iran, Islamic Republic of	253	254	127	76	4	4	377	326
Japan	495	482	737	759	2	2	1 221	1 249
Korea, Republic of	330	325	346	358	5	5	671	694
Malaysia	31	31	193	212	14	15	210	228
Pakistan	1 680	1 735	5	4	29	33	1 656	1 707
Philippines	290	286	142	154	4	4	427	436
AFRICA	**6 161**	**6 245**	**866**	**909**	**76**	**113**	**6 951**	**7 041**
Algeria	135	132	94	95	-	-	229	228
Angola	107	108	143	150	-	-	250	258
Egypt	870	880	402	445	2	5	1 270	1 320
South Africa	860	862	30	32	45	80	846	813
CENTRAL AMERICA	**2 524**	**2 572**	**382**	**361**	**313**	**328**	**2 593**	**2 605**
Mexico	1 826	1 845	223	200	133	145	1 916	1 900
SOUTH AMERICA	**15 706**	**15 517**	**464**	**370**	**2 747**	**2 688**	**13 413**	**13 205**
Argentina	2 672	2 700	-	1	215	254	2 458	2 447
Brazil	9 723	9 432	71	75	1 839	1 691	7 955	7 816
Chile	209	211	224	169	5	7	428	373
Colombia	840	835	4	4	11	6	834	834
Uruguay	525	550	3	2	312	324	216	227
Venezuela	510	512	144	100	-	-	644	617
NORTH AMERICA	**12 161**	**12 077**	**1 507**	**1 756**	**1 562**	**1 510**	**12 169**	**12 318**
Canada	1 083	1 021	280	293	343	364	1 033	951
United States of America	11 078	11 055	1 224	1 460	1 218	1 146	11 133	11 365
EUROPE	**10 453**	**10 553**	**1 267**	**1 213**	**516**	**483**	**11 204**	**11 284**
European Union	7 661	7 788	327	323	315	302	7 674	7 809
Russian Federation	1 654	1 650	833	787	47	43	2 440	2 394
Ukraine	459	443	3	4	18	19	445	427
OCEANIA	**3 093**	**3 240**	**60**	**63**	**2 209**	**2 468**	**1 014**	**837**
Australia	2 423	2 550	12	12	1 680	1 881	825	684
New Zealand	650	670	17	18	526	584	141	104
WORLD	**68 070**	**68 273**	**9 161**	**9 188**	**9 607**	**9 659**	**67 757**	**67 844**
Developing countries	39 181	39 201	5 406	5 213	5 271	5 114	39 324	39 333
Developed countries	28 888	29 072	3 755	3 975	4 336	4 546	28 433	28 511
LIFDCs	8 102	8 239	295	303	2 071	1 935	6 326	6 607
LDCs	3 485	3 529	218	229	3	3	3 700	3 754

APPENDIX TABLE 15: **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**	**642**	**593**	**45**	**53**	**8 699**	**8 731**
Bangladesh	210	213	-	-	-	-	210	213
China	4 128	4 178	327	272	2	2	4 453	4 449
India	741	732	-	-	23	27	718	706
Iran, Islamic Republic of	280	291	2	1	-	-	282	292
Pakistan	464	467	-	-	13	15	451	452
Saudi Arabia	132	134	60	64	3	3	189	195
Turkey	360	366	1	1	-	-	361	367
AFRICA	**3 064**	**3 101**	**31**	**29**	**36**	**37**	**3 059**	**3 093**
Algeria	308	315	5	3	-	-	313	318
Nigeria	481	487	-	-	-	-	481	487
South Africa	181	182	10	9	2	1	189	190
Sudan	482	483	-	-	6	6	477	478
CENTRAL AMERICA	**125**	**124**	**21**	**19**	**-**	**-**	**145**	**143**
Mexico	96	95	11	10	-	-	107	105
SOUTH AMERICA	**322**	**324**	**10**	**8**	**27**	**22**	**305**	**310**
Brazil	117	116	10	8	-	-	127	124
NORTH AMERICA	**91**	**92**	**118**	**124**	**4**	**3**	**205**	**213**
United States of America	74	75	98	105	4	3	167	177
EUROPE	**1 223**	**1 243**	**176**	**165**	**36**	**26**	**1 363**	**1 381**
European Union	904	920	156	150	28	18	1 032	1 052
Russian Federation	191	191	10	4	-	-	201	196
OCEANIA	**987**	**964**	**28**	**24**	**879**	**835**	**136**	**152**
Australia	575	558	1	1	481	462	95	98
New Zealand	411	405	4	4	398	374	17	35
WORLD	**13 913**	**14 038**	**1 026**	**962**	**1 027**	**976**	**13 913**	**14 025**
Developing countries	10 796	10 913	694	638	105	110	11 385	11 440
Developed countries	3 117	3 126	332	324	921	866	2 528	2 584
LIFDCs	3 698	3 728	25	23	31	35	3 692	3 715
LDCs	1 896	1 919	6	6	6	6	1 896	1 919

APPENDIX TABLE 16: **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	**68 176**	**68 136**	**3 756**	**3 731**	**299**	**264**	**71 584**	**71 811**
China	57 221	57 080	1 346	1 385	200	160	58 342	58 505
India	355	357	1	1	-	-	355	357
Indonesia	744	748	3	3	-	-	747	750
Japan	1 264	1 270	1 351	1 256	2	2	2 579	2 523
Korea, D.P.R.	113	114	3	3	-	-	116	117
Korea, Republic of	1 200	1 220	486	575	3	3	1 695	1 801
Malaysia	230	230	17	16	6	5	241	241
Philippines	1 701	1 724	122	120	3	3	1 821	1 841
Thailand	980	985	4	2	34	36	950	952
Viet Nam	3 321	3 354	183	120	22	25	3 482	3 449
AFRICA	**1 326**	**1 356**	**311**	**287**	**28**	**29**	**1 609**	**1 613**
Madagascar	59	60	-	-	-	-	59	60
Nigeria	255	257	1	1	-	-	256	258
South Africa	221	225	25	30	24	25	222	229
Uganda	118	120	1	1	-	-	118	120
CENTRAL AMERICA	**1 806**	**1 854**	**893**	**938**	**146**	**154**	**2 553**	**2 638**
Cuba	194	191	15	17	-	-	209	208
Mexico	1 285	1 335	711	753	127	135	1 870	1 953
SOUTH AMERICA	**5 413**	**5 473**	**190**	**184**	**807**	**804**	**4 795**	**4 854**
Argentina	442	460	11	10	1	1	452	469
Brazil	3 313	3 332	2	2	646	619	2 669	2 716
Chile	520	522	44	41	157	180	407	383
Colombia	245	249	71	70	-	-	316	319
Venezuela	250	260	5	4	-	-	255	264
NORTH AMERICA	**12 342**	**13 001**	**792**	**897**	**3 303**	**3 215**	**9 850**	**10 677**
Canada	1 973	2 001	239	246	1 176	1 142	1 039	1 110
United States of America	10 368	11 000	548	647	2 127	2 073	8 807	9 563
EUROPE	**27 710**	**28 442**	**739**	**472**	**2 388**	**2 465**	**26 062**	**26 449**
Belarus	443	451	41	31	79	40	405	442
European Union	22 796	23 423	15	15	2 222	2 333	20 590	21 105
Russian Federation	2 945	3 063	536	297	32	33	3 449	3 327
Serbia	242	240	29	31	26	27	245	244
Ukraine	809	790	40	26	12	16	838	800
OCEANIA	**497**	**501**	**262**	**310**	**35**	**34**	**719**	**776**
Australia	365	365	192	230	34	33	518	563
Papua New Guinea	73	72	8	9	-	-	81	81
WORLD	**117 270**	**118 763**	**6 942**	**6 818**	**7 006**	**6 964**	**117 173**	**118 819**
Developing countries	75 140	75 222	3 736	3 814	1 253	1 222	77 608	78 023
Developed countries	42 130	43 541	3 207	3 003	5 752	5 742	39 566	40 796
LIFDCs	3 307	3 355	284	288	7	8	3 584	3 635
LDCs	1 570	1 593	238	209	1	1	1 807	1 801

APPENDIX TABLE 17: **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	**38 420**	**38 947**	**6 791**	**6 909**	**1 949**	**2 031**	**43 251**	**43 838**
China	18 500	18 500	1 795	1 772	471	411	19 823	19 862
India	2 451	2 545	-	-	9	9	2 442	2 536
Indonesia	1 889	1 935	3	3	-	-	1 892	1 937
Iran, Islamic Republic of	2 045	2 132	10	4	68	73	1 987	2 064
Japan	1 474	1 471	1 089	1 105	11	10	2 533	2 563
Korea, Republic of	690	700	154	145	21	26	812	826
Kuwait	41	43	125	123	-	-	166	165
Malaysia	1 383	1 412	50	52	32	33	1 401	1 430
Saudi Arabia	580	586	810	820	30	32	1 360	1 374
Singapore	99	100	143	146	9	10	233	236
Thailand	1 540	1 620	10	8	773	889	796	749
Turkey	1 802	1 832	-	-	415	425	1 388	1 407
Yemen	151	149	130	132	-	-	281	281
AFRICA	**5 079**	**5 126**	**1 736**	**1 616**	**81**	**101**	**6 733**	**6 641**
Angola	34	35	386	180	-	-	420	216
South Africa	1 514	1 525	394	433	71	91	1 836	1 867
CENTRAL AMERICA	**4 341**	**4 388**	**1 506**	**1 582**	**47**	**47**	**5 800**	**5 923**
Cuba	31	33	210	194	-	-	241	227
Mexico	2 917	2 953	889	969	13	13	3 793	3 909
SOUTH AMERICA	**20 553**	**21 077**	**355**	**338**	**4 487**	**4 535**	**16 421**	**16 879**
Argentina	1 816	1 860	2	3	311	235	1 507	1 628
Brazil	13 315	13 648	3	3	4 037	4 156	9 281	9 495
Chile	670	668	94	95	117	120	647	643
Venezuela	1 300	1 360	138	112	-	-	1 438	1 472
NORTH AMERICA	**21 752**	**21 912**	**347**	**358**	**4 346**	**4 003**	**17 756**	**18 247**
Canada	1 286	1 311	226	232	178	169	1 316	1 364
United States of America	20 466	20 601	117	122	4 168	3 834	16 435	16 878
EUROPE	**18 989**	**19 357**	**1 433**	**1 199**	**1 771**	**1 831**	**18 650**	**18 726**
European Union	13 268	13 509	697	641	1 389	1 438	12 576	12 712
Russian Federation	3 666	3 760	460	280	64	60	4 062	3 982
Ukraine	1 252	1 274	64	66	176	181	1 141	1 159
OCEANIA	**1 318**	**1 332**	**89**	**91**	**60**	**59**	**1 347**	**1 364**
Australia	1 116	1 129	17	18	43	41	1 088	1 105
New Zealand	176	176	1	1	16	18	160	159
WORLD	**110 452**	**112 139**	**12 256**	**12 093**	**12 741**	**12 607**	**109 958**	**111 620**
Developing countries	64 581	65 683	8 669	8 645	6 473	6 604	66 786	67 740
Developed countries	45 871	46 456	3 586	3 448	6 268	6 004	43 173	43 879
LIFDCs	5 525	5 661	1 228	1 301	27	26	6 727	6 937
LDCs	2 417	2 488	1 195	1 023	2	2	3 610	3 510

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
Monthly									
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	6 506	3 928	3 661	2 739	2 484	1 576	1 080	1 631
2015 - April	5 014	6 302	3 965	3 693	2 535	2 402	1 618	1 056	1 652
2015 - May	4 772	6 527	3 910	3 600	2 610	2 612	1 629	1 055	1 740
2015 - June	4 575	5 961	4 247	3 418	2 494	2 745	1 682	991	1 721
2015 - July	5 155	6 208	4 454	3 382	2 437	2 739	1 584	971	1 704
2015 – August	5 107	6 265	4 322	3 502	2 440	2 530	1 581	968	1 685
2015 - September	4 943	6 260	4 260	3 626	2 430	2 450	1 691	962	1 655

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.)

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
Monthly					
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	170	214	158	128	172
2015 - April	171	218	159	125	172
2015 - May	173	216	155	129	178
2015 - June	169	211	148	131	173
2015 - July	173	227	146	126	170
2015 – August	171	225	151	124	169
2015 - September	171	221	157	126	167

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.