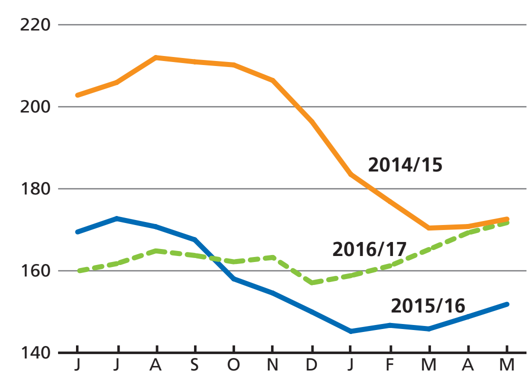
MEAT AND MEAT PRODUCTS

World total meat production is anticipated to stagnate for a second year in a row in 2017, rising by a meagre 0.3 percent to 322 million tonnes. Output is expected to grow in almost all countries, particularly in the United States, Brazil, India and Argentina. However, a downturn in output in China should continue to weigh on the overall trend. Excluding China, aggregate meat production of the rest of the world is expected to rise by 1.9 percent year-on-year. By category, bovine meat is forecast to register the largest growth in production, with marginal increases for poultry and ovine meat, and a slight fall for pigmeat.

Global trade in meat is forecast to register a second year of expansion in 2017, increasing by 2.5 percent to 32 million tonnes. Trade in pigmeat is set to rise by 4.1 percent, poultry meat by 2.9 percent and bovine meat by 0.8 percent, compared with last year, while ovine meat trade may see a 2 percent contraction. Increased meat imports are expected, particularly in China, but also in Mexico, Chile, the Republic of Korea, Japan, the Philippines, the United Arab Emirates, Viet Nam, Iraq and Singapore. By contrast, growth in domestic production may result in reduced purchases by the United States and the Russian Federation, with Egypt, Angola and Saudi Arabia also anticipated to buy less. The expansion in world exports is projected to be led by the United States and Brazil, followed by Canada, Thailand and Argentina, with sales also rising for the EU, Mexico, Ukraine, Chile and Belarus. Meanwhile, exports by Australia, China, New Zealand and India are likely to decline.

The FAO Meat Price Index averaged 171.7 points in May, up 2.5 points, or 1.5 percent, from April, continuing a trend of modest increases evident since the start of the year. From January to May, the Index rose by almost 8 percent, with quotations for ovine and pigmeat recording the largest growth, followed by poultry and bovine meat. Strong domestic and export demand stimulated pigmeat prices, particularly in the EU, while limited supplies bolstered ovine meat quotations. Poultry and bovine meat markets remained well-balanced. Overall, the May 2017 Meat Price Index was up 11 percent compared with May 2016.

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**	**321.0**	**322.0**	**0.3**
Bovine meat	67.6	68.3	69.6	1.9
Poultry meat	116.9	117.2	117.7	0.4
Pigmeat	116.1	115.6	114.7	-0.8
Ovine meat	14.4	14.4	14.5	0.6
Trade	**29.9**	**31.2**	**32.0**	**2.5**
Bovine meat	9.2	8.9	9.0	0.8
Poultry meat	12.2	12.8	13.2	2.9
Pigmeat	7.2	8.3	8.6	4.1
Ovine meat	1.0	0.9	0.9	-2.0
SUPPLY AND DEMAND INDICATORS				
Per caput food consumption:				
World (kg/year)	43.5	43.1	42.7	-0.9
Trade - share of prod. (%)	*9.3*	*9.7*	*9.9*	*2.1*

FAO MEAT PRICE INDEX (2002-2004=100)	2015	2016	2017 *Jan-May*	Change: Jan-May 2017 over Jan-May 2016 %
	168	156	165	11.4

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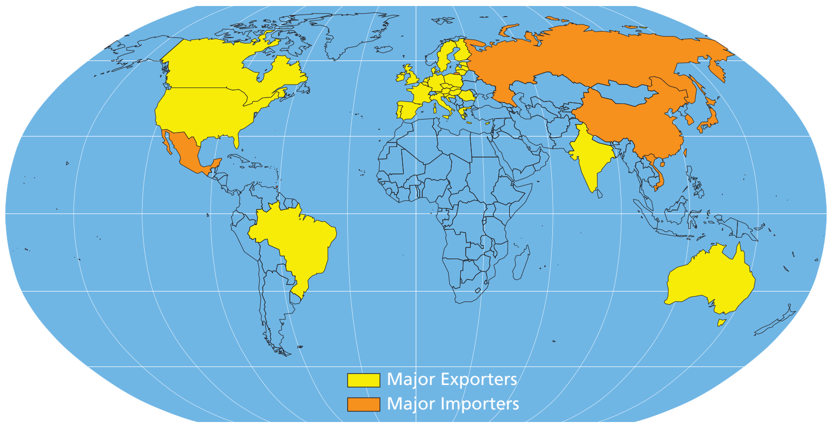
MEAT AND MEAT PRODUCTS



MEAT

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Production stagnant, trade growth continues

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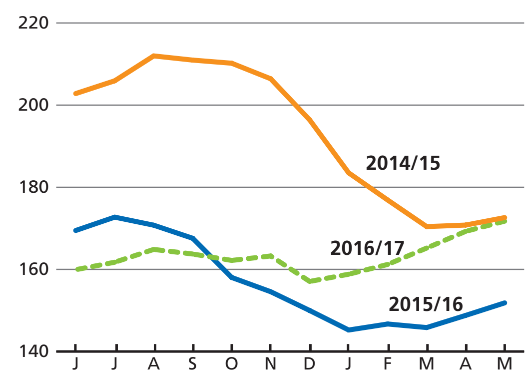
Global trade in meat is forecast to register a second year of expansion in 2017, increasing by 2.5 percent

Figure 1. Modest recovery in international prices (2002-2004=100)



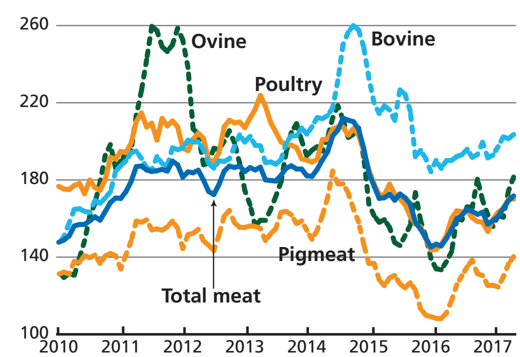


Table 1. World meat market at a glance

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		million tonnes		%
WORLD BALANCE				
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FAO MEAT PRICE INDEX (2002-2004=100)	**2014**	**2015**	**2016** *Jan-May*	**Change: Jan-May 2017 over Jan-May 2016 %**
	168	156	165	11.4

to 32 million tonnes. Trade in pigmeat is set to rise by 4.1 percent, poultry meat by 2.9 percent and bovine meat by 0.8 percent, compared with last year, while ovine meat trade may decrease by 2 percent. Increased meat imports are expected, particularly in China, but also in Mexico, Chile, the Republic of Korea, Japan, the Philippines, the United Arab Emirates, Viet Nam, Iraq and Singapore. By contrast, growth in domestic production may result in reduced purchases by the United States and the Russian Federation, with Egypt, Angola and Saudi Arabia also anticipated to buy less. The expansion in world exports is projected to be led by the United States and Brazil, followed by Canada, Thailand and Argentina, with sales also rising for the EU, Mexico, Ukraine, Chile and Belarus. Meanwhile, exports by Australia, China, New Zealand and India are likely to decline.

BOVINE MEAT

Production: growth in the Americas

Bovine meat production in 2017 is forecast to grow by 1.9 percent from last year, to 69.6 million tonnes, a second year of increase after the stagnation that prevailed from 2013 through 2015. Substantial output increases are anticipated in the **United States** and **Brazil**, with production also expected to rise in **Argentina**, **China** and the **EU**. Meanwhile, output could fall in **Australia**, **New Zealand** and the **Russian Federation**.

In *Latin America and the Caribbean*, recovery in production is anticipated following extreme weather conditions stemming from *El Niño*, which brought exceptionally dry conditions to some parts of the region in 2015 and 2016, while others experienced excessive rainfall and flooding. Weather conditions were generally more favourable in 2017 and, as a consequence, overall output is expected to rise by almost 2 percent. In **Brazil**, a favourable international market encouraged producers to expand herds, even though domestic demand remained subdued. Production is predicted to rise by 2.3 percent, due to a rise in slaughter rates and to improved pastures and falling feed prices that led to increased finished weights. In **Argentina**, a 4.2 percent rise in output to 2.8 million tonnes is predicted as a four-year period of herd expansion comes to an end, with offtake of cattle increasing, pasture conditions improving following extensive flooding in 2016, and feed prices dropping. Production in **Uruguay** is also projected to increase, due to increased offtake as herd rebuilding ends. In neighbouring **Paraguay**, herd expansion is projected to result in unchanged production. Bovine meat production in **Mexico** is expected to be slightly up on last year, as heavier carcass weights should more than offset a decline in cattle slaughtered.

In *Asia*, subdued international demand for buffalo meat is forecast to slow the growth of bovine meat production in **India.** However, there remains latent potential to raise offtake, owing to dairy herd expansion providing a pool of older dairy buffaloes for potential slaughter. In **China**, bovine meat production is anticipated to rise a further 1.4 percent from last year to 7.1 million tonnes. Stable domestic prices have attracted investment into cattle farming, while low returns from milk production are predicted to encourage further liquidation of the dairy herd. Elsewhere, output is forecast to rise in the **Republic of Korea**, as weaker domestic prices could lead farmers to advance cattle slaughter. Output in **Japan** is anticipated to be little changed, due to heavier slaughter weights compensating for a decline in cattle offtake. In *Africa*, poor pasture conditions persist in large parts of **Kenya**, **Somalia**, **Ethiopia** and **Tanzania** – due to inadequate precipitation during the October to December 2016 rainy season – and are forecast to impinge on production. Meanwhile, bovine meat output in southern Africa may rise in a number of countries, including **Malawi**, **South Africa** and **Zambia**, as abundant seasonal rains have led to improvements in pastures, animal condition and feed supplies, alleviating some of the effects of the previous chronic drought.

In *North America*, bovine meat production in the **United States** is forecast to reach a 9-year high of 12.1 million tonnes, an increase of 5.1 percent, because of increased slaughter and heavier carcass weights. In **Canada**, little growth in cattle numbers is anticipated, after substantial growth last year indicated the possible beginning of a phase of herd rebuilding. A decrease in carcass weights could constrain production growth in 2017, which is forecast to remain at slightly above 1.2 million tonnes.

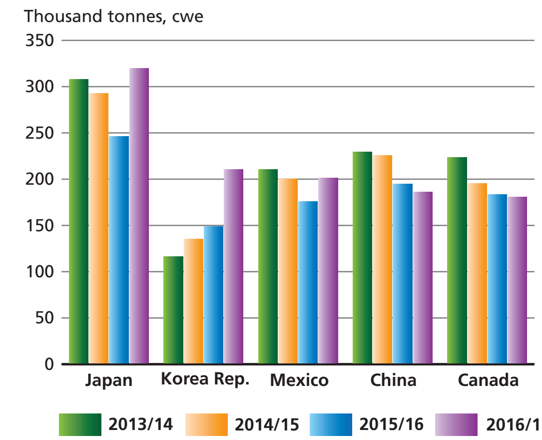
Australia is set to enter a phase of herd rebuilding in 2017, which, in spite of heavier carcass weights, is predicted to result in bovine meat output falling by 3 percent, to 2 million tonnes. Likewise, in **New Zealand**, slaughter numbers are expected to fall and bovine meat production may drop by 4.5 percent to 588 000 tonnes. Additionally, improved milk pay-outs have halted the process of exacerbated culling of the dairy herd which occurred in the previous two years, prompted by depressed international prices for dairy products.

In the **Russian Federation**, 2017 bovine meat output may drop by almost 2 percent to 1.6 million tonnes, as a result of poor profitability discouraging investment and leading to herd reduction. Production could rise 1.2 percent in the **European Union**, where continued restructuring in the dairy industry is generating an increase in cattle for slaughter.

Trade: modest increase foreseen

After two years of decline, world trade in bovine meat in 2017 is anticipated to increase, growing by a modest 0.8 percent to 9.0 million tonnes. Expanded sales are forecast to be concentrated in the *Americas,* notably the **United States**, **Argentina**, **Canada**, **Brazil** and **Mexico**, while shipments by the **EU** and **South Africa** could also rise. Impetus from these countries is projected to more than compensate for diminished sales by **Australia**, **New Zealand** and **India**. Robust growth in trade is anticipated for the United States, which could see shipments increase by 6.5 percent to 1.3 million tonnes, underpinned by a combination of a rise in domestic production, augmenting export supply, and reduced competition from *Oceania* in its traditional overseas markets, including the Republic of Korea and Japan. **Brazil** is also forecast to increase its exports, based on an expected increase in production and limited growth in domestic demand. Deliveries by **Australia** and **New Zealand** are forecast to fall for a second year, both dropping around 5 percent from 2016 levels, concomitant on herd retention reducing offtake. **India's** bovine meat exports are expected to remain around 1.6 million tonnes in 2017.

Figure 2. Bovine meat exports: US major markets (April-March)



Among bovine meat importers, the surge in purchases by **China** is expected to remain the main motor driving demand. Elsewhere in Asia, expansion in imports is projected for **Japan**, the **Republic of Korea** and the **Islamic Republic of Iran**, while purchases by **Chile**, **Mexico** and the **EU** could also grow. A second year of markedly reduced imports by the **United States**, combined with decreases by **Egypt**, **Viet Nam**, **Canada** and the **Russian Federation,** would somewhat counterbalance the generally positive trade outlook. In China, imports in 2017 could reach 1 575 000 tonnes, a rise of over 12 percent, pursuant to a 16 percent increase in 2016. Most of the increase in China's imports is forecast to be met by supplies from *South America*, especially Brazil, but also Argentina and Uruguay. Countries from this region are reaping the benefits of bilateral animal health protocols, vastly improving access to China's market, and from reduced competition from Australia. Meanwhile, 2017 purchases by the United States are forecast to fall a significant 11 percent to 1 080 000 tonnes, subsequent to a 13 percent drop in 2016, all owing to a continuous rise in domestic output and a considerable reduction in export availability from *Oceania*, its principal source of external supply.

PIGMEAT

Production: decline continues

World production of pigmeat is forecast to decline slightly in 2017, dropping by 0.8 percent to 114.7 million tonnes, marking a third year of reduced output. **China**, the predominant producer, accounting for almost half of the world total, continues to exert an overwhelming influence on the outlook. The enforcement of environmental regulations has caused farms within highly urbanized regions of China to either close or relocate. Consequently, the country's pigmeat production is projected to fall by 3.9 percent to 49.8 million tonnes. This would constitute the third annual drop in output, representing an overall decline of 10 percent since 2014. The ongoing restructuring of the pigmeat industry in China will provide the foundation for future expansion through enhanced efficiency and greater economies of scale. Staying in Asia, production growth is forecast for **Viet Nam**, the **Philippines** and the **Republic of Korea**, while in **Japan** output is projected to remain stable.

Elsewhere, a third year of growth is foreseen for the **United States**, where production could rise by 4.6 percent to 11.8 million tonnes. Output in **Mexico** is also forecast to expand and could rise by almost 3 percent to 1.4 million. International demand is projected to boost production in **Brazil** and **Canada**. In the **Russian Federation**, continued growth in pigmeat production is anticipated. As the country moves closer to fully meeting domestic demand, output could expand by almost 5 percent to 3.6 million tonnes, based on growth in large-scale production and improved feed efficiency. Despite favourable domestic and international demand, production in the **European Union** is likely to be essentially unchanged, at 23.3 million tonnes, owing to a decline in breeding sow numbers limiting the supply of piglets. Meanwhile, output in **Ukraine** may drop because excess production in 2016 caused prices to fall and reduced profitability.

Trade: vibrant

Trade in pigmeat is set to record a further year of growth in 2017, increasing by as much as 4.1 percent to an historical high of 8.6 million tonnes. A third year of exceptional imports by **China** is projected to be the main engine of growth in pigmeat trade. The country, which replaced Japan as the principal international market for pigmeat in 2015, could see its purchases increase by 12 percent, attendant on reduced domestic production. Increased imports are also anticipated for **Japan**, **Mexico**, the **Republic of Korea** and the **Philippines**, while those of the **Russian Federation**, the **United States**, **Angola** and **Viet Nam** are forecast to fall.

Buoyant world import demand is forecast to stimulate exports by the **United States**, **Brazil** and **Canada**, while supply limitations could mean that shipments by the **EU** would be similar to last year. Sales by the United States are projected to increase by 8.4 percent, to 2.5 million tonnes, centred on rising trade with China and Mexico, among others. Brazil is anticipated to see its exports increase by 10 percent, stemming from greater trade with Asia, especially China, but also with neighbouring Chile, Argentina and Uruguay. For Canada, a swell in sales to China is predicted to more than compensate for reduced shipments to the United States, leading to an overall 3.6 percent increase in the country's pigmeat exports. In Canada, the recent industry-wide elimination of the use in feed rations of *ractomine*, a beta-agonist compound that promotes leanness and which is banned in many countries, has opened up additional opportunities for trade, including exports to China where pigmeat imports are required to be certified as ractomine-free. In 2015 and 2016, the EU experienced a phenomenal escalation in sales to China, which surged by over 80 percent annually. However, a lack of production growth in the EU would curtail its potential to provide additional supplies in 2017, and exports are

Figure 3. Favourable price/feed relationship for pig and poultry meat producers

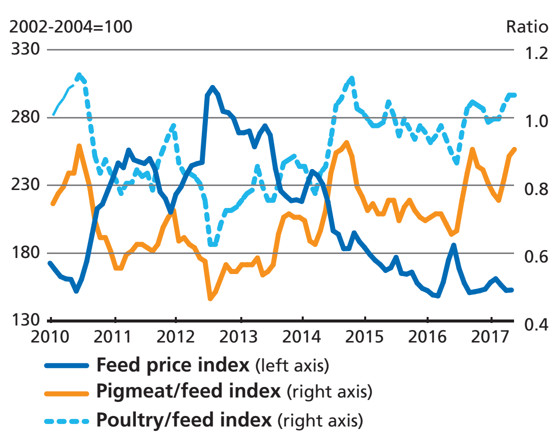
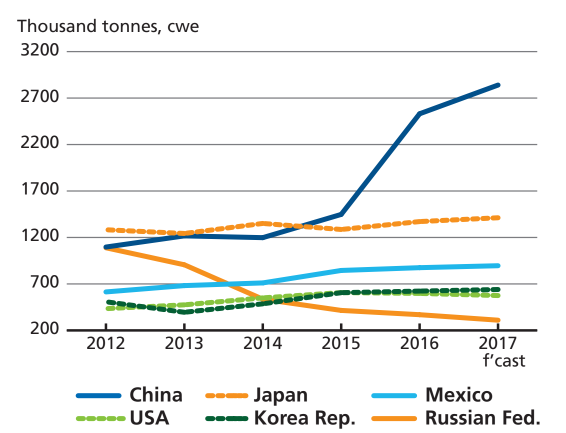


Figure 4. Pigmeat: Major importers



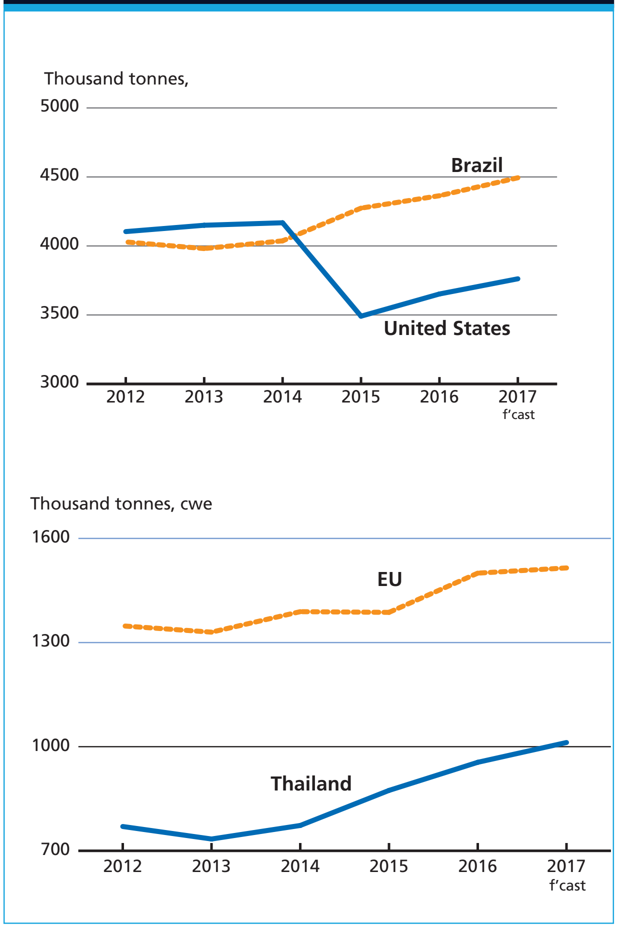
predicted to remain unchanged at 3.1 million tonnes. Nevertheless, the EU would remain the main world exporter of pigmeat, followed, in order of magnitude, by the United States, Canada and Brazil.

POULTRY MEAT

Production: limited expansion

Limited growth is projected for poultry meat production in 2017, with global output forecast to increase by a mere 0.4 percent to 117.7 million tonnes. Outbreaks of *Highly Pathogenic Avian Influenza* (HPAI) in 2016/17, combined with reduced producer returns in several countries, are expected to dampen growth. Nevertheless, the modest increase at the world level obscures the fact that, excluding China, output elsewhere is forecast to expand by 2 percent. Substantial increases in output are anticipated in **Brazil** and the **United States**, but also in **India**, **Thailand** and the **EU**, along with most other countries. In general, rising consumer demand, in part due to price differential between poultry and other types of meat, provides the basis for increased output. A notable exception is **China**, where output is forecast drop substantially for the second consecutive year and could fall by 10 percent to 15.5 million tonnes, to hit its lowest level since 2007. The difficulties of the poultry industry in China stem from HPAI, which has limited both the production and marketing of autochthonous poultry breeds, suppressed consumer demand and – due to import restrictions of breeding stock from countries not accepted by China as being HPAI-free – impinged on commercial broiler production. Elsewhere, production of poultry meat in the **Russian Federation** is foreseen to be little changed, with industry expansion restrained by a combination of stagnant domestic demand, reduced profitability and limited export possibilities owing to HPAI outbreaks.

Figure 5. Poultry meat exports: Brazil reconfirms lead



Trade: continued growth

Trade in poultry meat in 2017 is forecast to grow by 2.9 percent to 13.2 million tonnes. Reduced domestic production is anticipated to generate further import growth in **China**, where purchases could rise by 4.9 percent to 1.7 million tonnes, accounting for almost 40 percent of the projected expansion in world trade. Affordability and rising domestic consumption are important factors in anticipated growth in other markets, including **Viet Nam**, **Mexico** and **Chile.** The same factors should stimulate increased imports in the **United Arab Emirates**, the **Philippines**, **Iraq**, the **Republic of Korea** and **Singapore**. In **Japan,** utilization of accumulated stocks is expected to lead to poultry meat imports falling, while in **South Africa**, HPAI-related import prohibitions may result in a decline in purchases. Imports by the **Russian Federation** are also forecast to drop, as national production is almost fully able to satisfy domestic demand and the continuation of its country-specific trade embargo limits sources of external supplies. Reduced imports are also projected for **Saudi Arabia** and **Angola**.

Brazil is forecast to be the major beneficiary of rising international demand for poultry meat, with its exports forecast to expand by 3 percent to 4.5 million tonnes. Brazil's HPAI-free status provides it with access to markets denied to its main competitors, the United States and the EU, especially China. Sales by Brazil to China are expected to experience a second buoyant year, with exports to Iraq, South Africa, Mexico and the Republic of Korea also likely to rise. Despite a confirmed case of HPAI in the **United States** in March – meaning that animal-health-related trade restrictions could limit access to some markets – shipments in 2017 are projected to expand by 3 percent to 3.8 million tonnes, based on rising domestic production and general international acceptance of state-level, rather than countrywide, HPAI-related import prohibitions. Exports by the **European Union** are projected to be little changed, up 1 percent from 2016, due to firm domestic demand, a limited rise in output and HPAI-related trade restrictions. In **Thailand**, where export growth in the previous three years averaged 9.2 percent per year, a further year of expansion is foreseen, with sales expected to rise by 6 percent to exceed 1 million tonnes for the first time. Thailand's main markets are Japan and the EU, which together account for two-thirds of the country's poultry meat exports. Products shipped consist of deboned chicken parts, mainly cooked and prepared to the specific requirements of the client. Exports by **Ukraine**, **Argentina**, **Turkey**, **Canada** and **Chile** could also increase. Meanwhile, shipments by **China** are forecast to fall by 6.4 percent to 381 000 tonnes, owing to production constraints limiting availability.

OVINE MEAT

Production: continued modest growth

Production of ovine meat has grown little in the last few years, a trend likely to continue in 2017, with output forecast to increase by 0.6 percent to 14.5 million tonnes. Developing countries account for over 80 percent of the total, with the largest producers in this grouping being **China**, **India**, **Pakistan** and **Nigeria**. China has recorded steady growth in output in recent years, based on herd expansion and productivity gains. In the **European Union**, output is projected to record a small increase in 2017. Meanwhile, in *Oceania*, lower output is foreseen in **Australia** where herd rebuilding has reduced the number of lambs slaughtered, while in **New Zealand** a decline in the herd size is projected to result in a fall in output.

Trade: contraction continues

World trade in ovine meat is forecast to contract by 2 percent in 2017, to 902 000 tonnes, principally reflecting reduced shipments by **Australia** and **New Zealand**. Australia is projected to record a 2.8 percent drop in exports, while New Zealand could experience a decline of almost 2 percent. Limited world export availabilities, and increased domestic production, are forecast to result in imports by **China** remaining unchanged, while those of the EU could decline. Imports by the **United States**, the **United Arab Emirates**, **Malaysia** and **Canada** are forecast to be up slightly, in line with a modest increase in demand.

MEAT: MAJOR POLICY DEVELOPMENTS MID-SEPTEMBER 2016 TO MID-MAY 2017*

COUNTRY	PRODUCT	DATE	POLICY CATEGORY/INSTRUMENT	DESCRIPTION
Argentina	All	Dec-16	State Market intervention	Modified export rebates for a wide range of high value and value-added agricultural products, including meat products, to promote diversified agro-industrial development and strengthen export competitiveness. New export rebate rates for meat products vary from 2.5 percent to 6 percent.
Azerbaijan	All	Sep-16	Import policy	Announced a revision of customs duties on a number of agricultural products, including meat and edible meat offal, which will be under an import duty of USD 1 per kg. The new tariffs came into effect on November 2, 2016, and will remain in place for two years.
Belarus	Poultry meat	Dec-16	Import restrictions	Restricted shipments of poultry from administrative regions of the Russian Federation affected by HPAI.
Brazil	All	Mar-17	Limited market access	Faced market access limitations in about 20 of its meat exporting destinations, including its largest meat importers – China, Chile, Egypt, the EU, Japan and Mexico – which had introduced full or partial meat import bans or restrictions. This follows an investigation by Brazil's federal police on some meat packers' use of meat unsuitable for human consumption. Key importing countries have now lifted their bans.
China	All	Jan-17	Food safety standards	Introduced new technical requirements for importing breeding animals, semen and embryos for pigs and cattle, and breeding chickens, effective from 1 January 2017.
	All	Feb-17	Food safety standards	Issued its 13th Five-Year Plan on Food Safety, which calls for aligning Chinese standards with international standards, and launching a food safety risk alert system and a food importer/exporter monitoring mechanism.
	Bovine meat	Apr-17	Import ban lifted	Signed a formal protocol with Ireland on inspection, quarantine and veterinary health requirements for Irish frozen beef to be exported to China. With the conclusion of the formalities, Ireland could restart exporting beef to China – exports which had been banned following a bovine spongiform encephalopathy (BSE) outbreak in Europe in 2000.
	All	May-17	Free Trade Agreement	Negotiated an agreement with the United States to ease restrictions on access to each other's markets for agricultural products, financial services and energy. Under the deal, China agreed to resume beef imports from the US, and the US agreed to open its market to cooked poultry from China.
Egypt	Poultry meat	Nov-16	Tariff rate quota	Suspended the 30 percent tariff on imported frozen poultry for the period from November 10, 2016 to May 31, 2017.
European Union	All	Feb-17	Free Trade Agreement	Signed the Comprehensive Economic and Trade Agreement (CETA) with Canada that covers nearly all Canada-EU trade, including trade in livestock and livestock products. The European Parliament voted in favour of CETA on 15 February 2017. The agreement will come into full force only when all EU member states ratify it.
Kazakhstan	Bovine meat	Jan-17	Tariff rate quota	Released the first stage of 2017 tariff quota volumes for bovine meat and poultry importation, originated and imported from countries with which the Eurasian Economic Union country-members have no free-trade agreements or exceptions and the distribution of 2017 tariff quota volumes among historical suppliers.
	Poultry meat	Jan-17	Import restrictions	Restricted shipments of poultry from administrative regions of the Russian Federation affected by HPAI
Mexico	Poultry meat	Nov-16	State Market Intervention	Announced that compensatory import duties on poultry products will end by the close of 2017. These compensatory import duties were imposed in 2012 to prevent anti-dumping, but never applied.
	Poultry meat	Mar-17	Import ban	Announced restrictive trade measures applied to United States live poultry and poultry products intended to be exported to Mexico from Lincoln County, Tennessee, following an outbreak of highly pathogenic avian influenza (HPAI) there in March 2017.

COUNTRY	PRODUCT	DATE	POLICY CATEGORY/INSTRUMENT	DESCRIPTION
Mexico	Bovine meat	Mar-17	Tariff rate quota	Established specific provisions governing the unilateral TRQs that were published on June 8, 2016. The new TRQs will allow 200 000 mt of bovine meat imports.
New Zealand	All	Feb-17	Market access	Signed the Meat Arrangement – an agreement with the Iranian Veterinary Organisation (IVO) – to resume chilled and frozen ovine and bovine meat exports to Iran.
Russian Federation	Poultry meat	Dec-16	Import ban	Imposed bans or restrictions on poultry imports from several countries including Germany, France, the Netherlands, the United Kingdom, Sweden and Poland, in addition to the restrictions already in place on the United States.
	Bovine meat	Feb-17	Import ban	Banned imports of New Zealand bovine meat and by-products, in response to detections of listeria bacteria and the beta-agonist growth promotant, ractopamine, in shipments from one particular meat plant in 2016.
Saudi Arabia	Poultry meat	Apr-17	Import ban	Banned import of live birds, hatching eggs and chicks from Viet Nam due to the presence of HPAI.
South Africa	Poultry meat	Dec-17	State Market Intervention	Imposed a provisional "safeguard duty" of 13.9 percent on frozen bone-in-chicken from the EU. This follows anti-dumping tariffs ranging from 3.86 percent to 73.33 percent on import of certain types of poultry meat from Germany, the Netherlands and the United Kingdom.
Turkey	All	Apr-17	Production support	Authorized the subsidy programme for young farmers to continue in 2017, under which the government is to provide support to the livestock sector including cattle, sheep, goat and poultry. The programme budget is estimated at USD 132 million and will benefit over 10 000 young farmers between the ages of 18 and 40.
United Arab Emirates	Poultry meat	Mar-17	Import ban	Banned imports of all types of live domestic, wild and ornamental birds, as well as chicks, eggs and bird remains from Lincoln County, Tennessee, United States, that have not been heat-treated, following an outbreak of HPAI in March.
United States	Bovine meat	Jan-17	Import ban lifted	Lifted the ban on imports of bovine meat from France. The ban had been imposed following an outbreak of BSE in the 1990s.

* 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	
	2016 *estim.*	2017 *f'cast*	2016 *estim.*	2017 *f'cast*	2016 *estim.*	2017 *f'cast*	2016 *estim.*	2017 *f'cast*
ASIA	**133 291**	**130 648**	**17 218**	**17 942**	**4 200**	**4 203**	**146 338**	**144 390**
China	81 930	78 317	5 776	6 335	557	516	87 159	84 146
India	6 987	7 206	1	1	1 665	1 636	5 323	5 572
Indonesia	3 471	3 494	92	92	5	5	3 559	3 581
Iran, Islamic Republic of	2 667	2 699	122	129	85	83	2 703	2 745
Japan	3 999	3 988	3 292	3 329	15	16	7 276	7 336
Korea, Republic of	2 467	2 501	1 239	1 286	40	41	3 688	3 745
Malaysia	1 877	1 904	338	343	65	70	2 150	2 177
Pakistan	3 252	3 285	33	34	71	71	3 215	3 249
Philippines	3 493	3 612	516	552	11	11	3 998	4 153
Saudi Arabia	884	916	1 096	1 078	103	103	1 878	1 891
Singapore	114	116	365	380	35	36	445	460
Thailand	3 188	3 300	21	19	1 020	1 077	2 193	2 226
Turkey	3 452	3 548	9	8	343	355	3 111	3 176
Viet Nam	4 895	5 043	1 550	1 571	32	32	6 414	6 582
AFRICA	**17 837**	**18 055**	**2 718**	**2 654**	**275**	**287**	**20 281**	**20 422**
Algeria	752	761	86	88	1	1	836	848
Angola	289	297	368	350	-	-	657	647
Egypt	2 417	2 445	357	316	9	8	2 766	2 753
Nigeria	1 446	1 449	3	3	1	1	1 449	1 452
South Africa	3 259	3 381	626	624	168	180	3 718	3 825
CENTRAL AMERICA	**9 415**	**9 609**	**3 228**	**3 325**	**555**	**587**	**12 088**	**12 347**
Cuba	326	331	288	297	-	-	615	628
Mexico	6 626	6 795	2 063	2 130	325	349	8 364	8 575
SOUTH AMERICA	**42 215**	**43 428**	**1 103**	**1 165**	**8 469**	**8 780**	**34 849**	**35 812**
Argentina	5 352	5 567	46	36	454	503	4 944	5 101
Brazil	26 356	27 230	70	71	6 896	7 129	19 530	20 173
Chile	1 477	1 506	495	544	335	356	1 637	1 694
Colombia	2 634	2 695	158	172	14	15	2 777	2 852
Uruguay	657	673	55	59	395	399	317	333
Venezuela	1 540	1 522	161	160	-	-	1 701	1 682
NORTH AMERICA	**49 308**	**51 047**	**2 826**	**2 672**	**9 000**	**9 452**	**43 156**	**44 312**
Canada	4 657	4 812	735	738	1 838	1 910	3 553	3 637
United States of America	44 650	46 234	2 079	1 923	7 162	7 542	39 592	40 663
EUROPE	**62 654**	**62 987**	**2 917**	**2 829**	**5 875**	**5 935**	**59 690**	**59 881**
Belarus	1 167	1 177	47	58	307	327	907	907
European Union	47 709	47 849	1 337	1 344	5 002	5 026	44 044	44 167
Russian Federation	9 621	9 779	1 073	980	215	208	10 474	10 551
Ukraine	2 396	2 408	94	87	272	296	2 218	2 198
OCEANIA	**6 310**	**6 246**	**482**	**489**	**2 814**	**2 709**	**3 987**	**4 033**
Australia	4 423	4 396	246	250	1 852	1 782	2 825	2 871
New Zealand	1 378	1 341	76	78	958	924	496	495
WORLD	**321 029**	**322 020**	**30 491**	**31 076**	**31 187**	**31 954**	**320 389**	**321 197**
Developing countries	199 268	198 261	21 134	21 918	13 487	13 845	206 944	206 302
Developed countries	121 761	123 759	9 357	9 158	17 701	18 109	113 445	114 895
LIFDCs	23 530	23 815	1 303	1 299	1 903	1 879	22 930	23 235
LDCs	10 536	10 617	1 320	1 308	24	24	11 832	11 901

[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	**18 322**	**18 542**	**4 784**	**4 989**	**1 880**	**1 850**	**21 212**	**21 679**
China	7 015	7 116	1 404	1 575	33	30	8 356	8 671
India	2 642	2 647	-	-	1 638	1 610	1 004	1 037
Indonesia	510	508	75	75	-	-	585	583
Iran, Islamic Republic of	195	205	115	122	4	5	306	322
Japan	465	460	706	745	3	3	1 191	1 215
Korea, Republic of	277	285	451	465	7	7	721	743
Malaysia	31	32	202	198	10	9	224	221
Pakistan	1 759	1 789	4	4	33	33	1 730	1 760
Philippines	310	313	154	157	3	3	461	467
AFRICA	**6 300**	**6 376**	**661**	**626**	**113**	**123**	**6 847**	**6 879**
Algeria	137	139	79	81	-	-	216	220
Angola	111	113	71	70	-	-	182	183
Egypt	923	930	340	300	6	6	1 257	1 224
South Africa	952	1 000	26	28	55	65	922	963
CENTRAL AMERICA	**2 568**	**2 607**	**390**	**408**	**343**	**362**	**2 615**	**2 652**
Mexico	1 880	1 910	206	217	165	178	1 921	1 949
SOUTH AMERICA	**15 291**	**15 671**	**420**	**434**	**2 614**	**2 666**	**13 097**	**13 439**
Argentina	2 650	2 760	-	-	234	262	2 416	2 499
Brazil	9 284	9 500	58	60	1 617	1 630	7 725	7 930
Chile	215	220	277	295	10	12	482	503
Colombia	786	814	4	4	13	14	777	804
Uruguay	550	564	6	6	375	380	181	190
Venezuela	522	524	54	50	-	-	576	574
NORTH AMERICA	**12 632**	**13 246**	**1 480**	**1 333**	**1 595**	**1 686**	**12 532**	**12 909**
Canada	1 130	1 160	259	250	394	408	985	1 004
United States of America	11 502	12 086	1 218	1 080	1 200	1 278	11 544	11 902
EUROPE	**10 424**	**10 473**	**837**	**841**	**496**	**511**	**10 764**	**10 804**
European Union	7 703	7 796	326	335	297	312	7 732	7 819
Russian Federation	1 605	1 574	427	420	42	42	1 990	1 952
Ukraine	385	375	2	2	24	22	364	356
OCEANIA	**2 753**	**2 658**	**54**	**54**	**1 882**	**1 797**	**938**	**917**
Australia	2 117	2 050	15	15	1 344	1 286	802	781
New Zealand	616	588	12	12	535	507	92	93
WORLD	**68 289**	**69 573**	**8 625**	**8 684**	**8 923**	**8 994**	**68 006**	**69 279**
Developing countries	42 035	42 756	5 576	5 739	4 950	5 001	42 625	43 479
Developed countries	26 254	26 817	3 049	2 946	3 973	3 994	25 381	25 801
LIFDCs	9 818	9 854	111	109	1 802	1 779	8 126	8 184
LDCs	3 531	3 549	134	133	4	4	3 662	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	**8 533**	**8 594**	**543**	**541**	**43**	**42**	**9 033**	**9 092**
Bangladesh	216	217	-	-	-	-	216	217
China	4 372	4 413	245	245	1	1	4 616	4 657
India	728	725	-	-	21	21	707	704
Iran, Islamic Republic of	295	297	3	4	-	-	298	301
Pakistan	477	478	-	-	13	13	464	465
Saudi Arabia	133	133	45	42	2	2	176	173
Turkey	382	384	1	1	-	-	383	385
AFRICA	**2 887**	**2 904**	**31**	**31**	**36**	**37**	**2 882**	**2 898**
Algeria	313	316	4	4	-	-	317	320
Nigeria	387	388	-	-	-	-	387	388
South Africa	213	215	9	8	1	1	221	222
Sudan	365	363	-	-	6	6	360	358
CENTRAL AMERICA	**123**	**122**	**20**	**19**	**-**	**-**	**143**	**142**
Mexico	94	93	10	9	-	-	104	102
SOUTH AMERICA	**311**	**315**	**6**	**6**	**15**	**15**	**303**	**306**
Brazil	118	119	6	6	-	-	124	125
NORTH AMERICA	**97**	**98**	**124**	**127**	**3**	**4**	**217**	**222**
United States of America	76	77	104	106	3	4	177	179
EUROPE	**1 286**	**1 306**	**173**	**166**	**24**	**24**	**1 435**	**1 447**
European Union	914	930	161	155	16	17	1 059	1 068
Russian Federation	224	225	3	2	-	-	227	227
OCEANIA	**1 143**	**1 125**	**27**	**27**	**798**	**779**	**373**	**372**
Australia	655	646	-	-	428	416	227	231
New Zealand	488	478	3	3	370	363	121	118
WORLD	**14 381**	**14 464**	**924**	**917**	**920**	**902**	**14 385**	**14 480**
Developing countries	11 854	11 935	604	601	94	94	12 364	12 442
Developed countries	2 527	2 529	320	316	825	807	2 021	2 038
LIFDCs	4 181	4 197	27	27	62	62	4 145	4 162
LDCs	1 624	1 635	5	5	18	18	1 611	1 622

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	**63 626**	**61 840**	**4 967**	**5 345**	**191**	**178**	**68 465**	**67 008**
China	51 844	49 822	2 530	2 840	102	90	54 312	52 571
India	357	357	1	1	-	-	357	358
Indonesia	782	783	6	6	-	-	788	789
Japan	1 279	1 270	1 371	1 412	3	3	2 644	2 681
Korea, D.P.R.	101	100	3	3	-	-	104	103
Korea, Republic of	1 266	1 305	623	640	2	2	1 914	1 942
Malaysia	218	220	30	31	5	6	242	246
Philippines	1 866	1 950	115	130	3	3	1 978	2 077
Thailand	940	945	2	2	28	27	915	920
Viet Nam	3 665	3 768	56	50	31	31	3 689	3 787
AFRICA	**1 375**	**1 391**	**267**	**256**	**27**	**29**	**1 615**	**1 618**
Madagascar	58	58	-	-	-	-	58	59
Nigeria	256	257	1	1	-	-	257	258
South Africa	246	250	31	27	23	26	254	251
Uganda	118	118	1	1	-	-	118	118
CENTRAL AMERICA	**1 906**	**1 954**	**1 099**	**1 127**	**172**	**182**	**2 833**	**2 899**
Cuba	202	205	22	24	-	-	224	229
Mexico	1 376	1 420	875	896	150	160	2 101	2 156
SOUTH AMERICA	**5 917**	**6 081**	**273**	**281**	**1 058**	**1 156**	**5 133**	**5 206**
Argentina	519	555	35	29	2	2	552	582
Brazil	3 700	3 815	2	2	890	980	2 812	2 837
Chile	508	510	75	80	163	170	420	420
Colombia	349	360	66	67	-	-	415	427
Venezuela	170	160	33	35	-	-	203	195
NORTH AMERICA	**13 443**	**14 028**	**845**	**826**	**3 552**	**3 790**	**10 742**	**11 059**
Canada	2 124	2 184	243	247	1 264	1 310	1 124	1 121
United States of America	11 319	11 844	598	575	2 287	2 480	9 614	9 934
EUROPE	**28 775**	**28 864**	**501**	**440**	**3 233**	**3 237**	**26 043**	**26 067**
Belarus	398	412	9	9	41	52	366	369
European Union	23 398	23 328	13	13	3 107	3 100	20 305	20 241
Russian Federation	3 403	3 556	369	310	49	50	3 724	3 816
Serbia	314	310	28	29	17	15	325	324
Ukraine	776	766	4	4	4	3	777	767
OCEANIA	**523**	**531**	**295**	**299**	**35**	**36**	**777**	**800**
Australia	385	395	212	215	34	34	558	581
Papua New Guinea	72	71	8	8	-	-	80	79
WORLD	**115 565**	**114 688**	**8 246**	**8 575**	**8 268**	**8 607**	**115 607**	**114 657**
Developing countries	71 640	70 089	5 257	5 620	1 445	1 542	75 519	74 166
Developed countries	43 926	44 599	2 989	2 955	6 823	7 066	40 088	40 491
LIFDCs	1 604	1 610	149	152	3	3	1 750	1 759
LDCs	1 837	1 855	160	152	1	1	1 996	2 006

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	**40 855**	**39 716**	**6 873**	**7 017**	**2 062**	**2 109**	**45 645**	**44 629**
China	17 214	15 483	1 591	1 670	406	381	18 399	16 773
India	3 111	3 329	-	-	4	3	3 107	3 325
Indonesia	2 071	2 096	4	4	-	-	2 074	2 099
Iran, Islamic Republic of	2 160	2 180	-	-	78	75	2 082	2 105
Japan	2 242	2 245	1 179	1 135	9	9	3 392	3 391
Korea, Republic of	913	900	144	160	31	32	1 021	1 028
Kuwait	50	51	129	136	-	-	179	187
Malaysia	1 625	1 650	73	80	50	55	1 648	1 675
Saudi Arabia	638	666	903	885	70	70	1 471	1 481
Singapore	96	98	176	188	13	14	258	272
Thailand	2 056	2 161	3	2	955	1 012	1 108	1 135
Turkey	1 885	1 939	-	-	327	340	1 558	1 599
Yemen	144	138	78	83	-	-	222	221
AFRICA	**5 834**	**5 943**	**1 727**	**1 707**	**90**	**90**	**7 470**	**7 560**
Angola	35	36	218	208	-	-	253	244
South Africa	1 825	1 893	560	561	81	82	2 304	2 372
CENTRAL AMERICA	**4 697**	**4 806**	**1 701**	**1 751**	**38**	**40**	**6 360**	**6 517**
Cuba	36	36	242	247	-	-	278	283
Mexico	3 173	3 269	959	994	8	10	4 124	4 253
SOUTH AMERICA	**20 488**	**21 153**	**402**	**442**	**4 715**	**4 877**	**16 174**	**16 718**
Argentina	1 984	2 051	11	7	187	207	1 808	1 851
Brazil	13 223	13 765	3	3	4 364	4 494	8 862	9 274
Chile	728	749	143	169	153	165	718	753
Venezuela	840	830	74	75	-	-	914	905
NORTH AMERICA	**22 910**	**23 448**	**368**	**377**	**3 832**	**3 954**	**19 449**	**19 905**
Canada	1 382	1 447	213	220	179	192	1 404	1 470
United States of America	21 527	22 001	151	153	3 652	3 762	18 041	18 431
EUROPE	**20 975**	**21 151**	**1 240**	**1 216**	**2 037**	**2 079**	**20 172**	**20 288**
European Union	14 651	14 753	737	740	1 500	1 515	13 888	13 978
Russian Federation	4 299	4 334	226	200	124	115	4 396	4 419
Ukraine	1 190	1 222	85	79	244	271	1 032	1 030
OCEANIA	**1 459**	**1 500**	**102**	**105**	**57**	**57**	**1 504**	**1 548**
Australia	1 244	1 283	18	19	34	33	1 229	1 269
New Zealand	187	189	1	1	23	24	165	166
WORLD	**117 217**	**117 717**	**12 412**	**12 616**	**12 831**	**13 205**	**116 775**	**117 166**
Developing countries	69 659	69 401	9 606	9 869	6 896	7 107	72 368	72 147
Developed countries	47 558	48 316	2 805	2 747	5 935	6 098	44 406	45 019
LIFDCs	6 223	6 450	988	983	31	30	7 179	7 402
LDCs	2 861	2 895	994	991	2	2	3 853	3 884

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 - May	4 187	5 360	3 769	3 307	2 253	2 071	1 644	984	1 533
2016 - June	4 175	5 541	3 772	3 700	2 398	2 131	1 792	998	1 581
2016 – July	4 378	5 356	3 754	3 690	2 511	2 148	1 868	940	1 628
2016 - August	4 224	5 525	3 991	3 846	2 659	2 218	1 903	930	1 646
2016 - September	4 064	5 424	3 968	3 842	2 636	2 450	1 943	891	1 628
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	4 528	5 680	4 030	4 203	2 440	2 785	1 987	998	1 675

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**

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 - May	154	190	143	117	160
2016 - June	160	192	160	126	164
2016 – July	162	193	159	130	163
2016 - August	165	196	166	135	164
2016 - September	164	192	166	138	160
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	172	204	181	140	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.