Meat and meat products market summary

Driven exclusively by gains in poultry and pigmeat production, global meat output is set to expand by nearly 2 percent to 302 million tonnes in 2012. Most of the sector growth is likely to originate in the developing countries, as developed countries may witness a second year of slipping output as profitability stumbles in the face of high input costs, stagnating domestic meat consumption and severe competition from developing countries. The struggle for markets is expected to intensify in 2012 as increased production in key importing countries slows down global meat trade expansion. This, combined with limited supplies in developed exporting countries, is shifting international market shares towards developing countries, in particular Brazil and India.

Drought in the Unites States, the major world meat exporter, and limited animal numbers in other exporting countries have kept international meat prices at near record levels in the first quarter of 2012. At 182 points in April, the FAO meat price index was up from March, supported by persistent gains in bovine and pigmeat prices. Slowing global import demand and two years of stagnating consumption in developed countries may imply less price pressure in 2012; however, meat production this year will hinge critically on feed prices and the animal disease situation.

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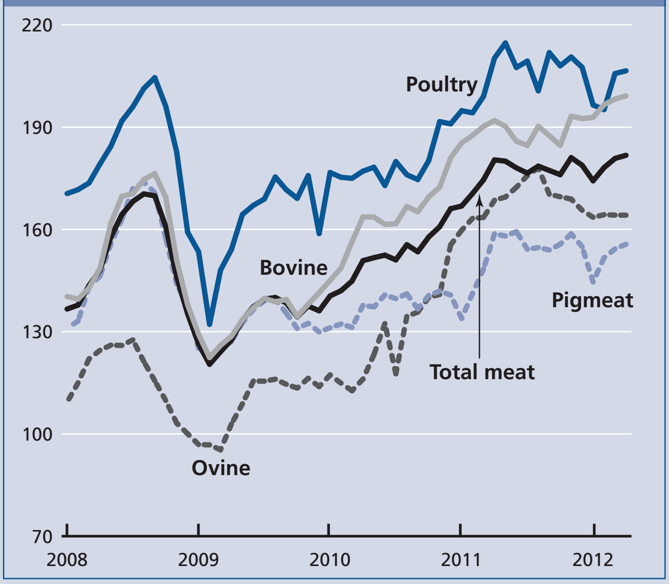
World meat market at a glance

	2010	2011 *estim.*	2012 *f'cast*	Change: 2012 over 2011
	million tonnes			%
WORLD BALANCE				
Production	**294.6**	**297.2**	**302.0**	**1.6**
Bovine meat	67.5	67.5	67.5	-
Poultry meat	98.2	101.6	103.5	1.8
Pigmeat	109.9	109.0	111.7	2.6
Ovine meat	13.5	13.5	13.6	0.9
Trade	**26.6**	**28.5**	**29.2**	**2.4**
Bovine meat	7.7	7.8	8.1	4.0
Poultry meat	11.6	12.6	13.0	3.1
Pigmeat	6.2	7.1	7.0	-0.7
Ovine meat	0.8	0.7	0.7	1.4
SUPPLY AND DEMAND INDICATORS				
Per caput food consumption:				
World (kg/year)	42.5	42.3	42.5	0.5
Developed (kg/year)	79.2	78.9	78.4	-0.5
Developing (kg/year)	32.4	32.3	32.8	1.5
FAO MEAT PRICE INDEX (2002-2004=100)	**2010**	**2011**	**2012** *Jan-Apr*	**Change: Jan-Apr 2012 over Jan-Apr 2011** %
	152	157	179	3.3

FAO international meat price indices (2002-2004 = 100)



countries, including **Malaysia** and the **Republic of Korea**. Exports from **Australia**, the world's third largest supplier, are likely to rise from their 2010/11 levels, sustained by greater domestic production. Deliveries by **South Africa** are expected to decrease and remain below the long-term trend. The bulk of the shipments will be supplied to the Southern Africa Customs Union (SACU) market. Exports by **Guatemala** are foreseen to be sustained by greater availabilities and competitive pricing. Sugar has become the biggest foreign exchange earner for Guatemala, with large investment being deployed to boost export of refined sugar. Similarly, sales by **Cuba** are set to increase due to greater supply availability, while in **Mexico**, exports are seen to fall because of lower production. However, high domestic sugar prices could stimulate greater use of high fructose corn syrup (HFCS) which, in turn, can free up additional sugar for export.

MEAT AND MEAT PRODUCTS

Meat prices hover at near record levels

Global meat markets are likely to face heightened trade competition in 2012, at the same time that recovering meat production in Asia is set to dampen growth in global import demand. Overall, meat trade is expected to expand by 2 percent, to 29.2 million tonnes, much of which is anticipated to be taken up by developing country exporters, which could increase their share of the global trade to 44 percent.

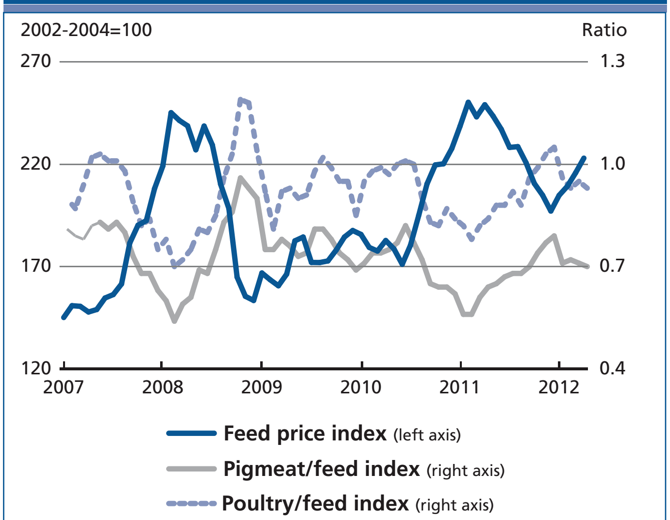
Disease outbreaks in 2011, drought-reduced cattle inventories and high feed costs sustained international meat prices to near record levels in the first quarter of 2012. In April, the FAO meat price index edged up to 182 points, surpassing the record 181 points registered in November 2011.

Indications of slowing import demand, especially for pig and poultry meats, portents a potential moderation of meat prices in the coming months, which, along with high feed costs, is raising concern about the profitability of the meat sector in 2012.

Table 19. World meat market at a glance

	2010	2011 *estim.*	2012 *f'cast*	Change: 2012 over 2011
		million tonnes		%
WORLD BALANCE				
Production	**294.6**	**297.2**	**302.0**	**1.6**
Bovine meat	67.5	67.5	67.5	-
Poultry meat	98.2	101.6	103.5	1.8
Pigmeat	109.9	109.0	111.7	2.6
Ovine meat	13.5	13.5	13.6	0.9
Trade	**26.6**	**28.5**	**29.2**	**2.4**
Bovine meat	7.7	7.8	8.1	4.0
Poultry meat	11.6	12.6	13.0	3.1
Pigmeat	6.2	7.1	7.0	-0.7
Ovine meat	0.8	0.7	0.7	1.4
SUPPLY AND DEMAND INDICATORS				
Per caput food consumption:				
World (kg/year)	42.5	42.3	42.5	0.5
Developed (kg/year)	79.2	78.9	78.4	-0.5
Developing (kg/year)	32.4	32.3	32.8	1.5
FAO MEAT PRICE INDEX (2002-2004=100)	**2010**	**2011**	**2012** *Jan-Apr*	**Change: Jan-Apr 2012 over Jan-Apr 2011** %
	152	157	179	3.3

Figure 39. Variable feed prices influence pork and poultry price movements



BOVINE MEAT

Drought and low animal numbers constrain bovine meat output

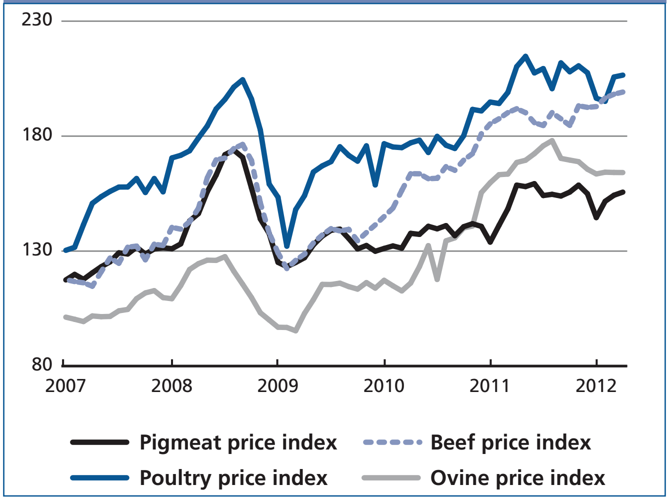
Global beef production is forecast to stagnate at around 67.5 million tonnes in 2012, as progress in developing countries is offset by contraction of output in developed countries. Much of the world increase is expected in Asia and Latin America and the Caribbean, with some gains also foreseen in Oceania. Beef production is forecast to decline in North America and in Europe.

In Asia, **India** is foreseen to lead a beef expansionary drive thanks to three new export-oriented slaughter and processing facilities opened in 2011. In the **Republic of Korea,** government incentives to slaughter low-performing cows are behind an anticipated 27 percent jump in beef output this year. On the other hand, a self-sufficiency policy stance in **Indonesia** has led to the halving of the live cattle import quota, a move that may stifle production growth this year. After two years of decline, output in Latin America and the Caribbean is set to rebound in 2012 on the heels of recovering output in **Brazil**. In **Argentina**, despite the closure of almost one-fourth of its meat plants over the past three years and a drop in cattle numbers to their lowest since 2007, a drought-induced rise in slaughter numbers may prompt a 3 percent production increase. In **Uruguay**, tight cow supply and a lack of suitable steers have reduced slaughtering to a 4-year low, while **Paraguay** is struggling in the wake of last year's foot-and-mouth disease (FMD) outbreak. In Africa, prolonged drought has meant reduced foliage and pastures in the eastern and, increasingly, western parts of the region, leading to high livestock mortality and disease outbreaks. In **Egypt**, the spread of a new strain of FMD is resulting in animal culling and restricted animal movements, which may depress output in the country by 12 percent and suppress production growth in the Africa region in 2012. Among developed countries, a mild winter in **Canada** and favourable pasture conditions in **Australia** and **New Zealand** are expected to raise carcass weights and boost beef production. By contrast, a decade of policy-induced cuts in cattle numbers in the **EU,** the **Russian Federation** and the **Ukraine** are forecast to depress output in 2012. This, combined with the worst drought on record in the **United States,** which has cut cattle herds to the lowest since the 1950s, is set to reduce developed country output by 2 percent to 29.4 million tonnes

Short supplies in major markets buoy beef trade prospects

Contrasting with lackluster production prospects, the outlook for beef trade is favourable, with an anticipated 4 percent increase in 2012, to 8.1 million tonnes. Much of the growth relies on expectations of larger imports by the **United States** and the **EU**, two key traditional beef exporters, in response to short domestic supplies. Exports from the United States, expected down, may be additionally pressured by the recent discovery of a BSE cow in California. Falling production in the **Russian Federation**, the second largest beef importer, will combine with a WTO-induced increase in the country's tariff-rate beef import quota, to reverse four years of declining purchases. Growing demand in the Far East and Middle Eastern markets, in particular **Vietnam, Malaysia, Saudi Arabia, Egypt** and the **Philippines**, are forecast to boost their imports, especially of low-priced buffalo meat originating from India, while Venezuela's imports will be buoyed by recently signed

Figure 40. Beef prices strong while easing feed prices translate into lower pigmeat and poultry prices



trade agreements. **Japan's** purchases, which rose in 2011 despite a slow economy and food safety concerns related to the nuclear disaster, are expected to stay stable, while demand from **China** will be dampened by the relative high international beef prices as compared with pigmeat.

Despite expectation of slight increases in exports from **Australia, New Zealand** and **Canada**, most of 2012's trade increase is expected to be captured by developing countries, particularly **Brazil** and **India**. In fact, developing countries are expected to supply more than half of the global market in 2012, signaling a historic reversal in the pattern of bovine meat trade. **Brazil's** position as the world's largest beef exporter will be buoyed by a gradual re-authorization of plants to export to the Russian Federation. **Argentina** may also ship more, subject to the government's issuance of export licenses. Competitive prices and growing export availabilities, on the back of an expanding dairy sector, could also increase exports from **India** by 20 percent to 1.3 million tonnes, which would make it rival the United States as the third largest beef exporter after Brazil and Australia. For the third consecutive year, beef exports may decline in **Uruguay**, constrained by drought-reduced cattle inventories, while high international prices will facilitate deliveries by smaller non-traditional beef exporters, such as **Mexico, Nicaragua** and **Costa Rica.**

As disease concerns in Asia abate, the pigmeat sector is poised for a quick recovery

After last year's drop, global pigmeat production is expected to rebound by 2.6 percent in 2012 to 111.7 million tonnes, underpinned by gains in Asia due to reduced incidence of disease. In the region, policy support, growing investments and favourable market returns, particularly in **China,** are behind an anticipated 4 percent expansion in the region's output to 62.8 million tonnes. The sector may also recover in **Japan,** following a rebuilding of sow inventories and a return to normal piglet births in provinces affected by the nuclear fallout in 2011. Investments in breeding and feed industries in **Vietnam** will support output growth, while a rebuilding of FMD-depleted inventories in the **Republic of Korea** is stimulating a 20 percent production recovery.

In South America, high beef prices are indirectly supporting the expansion of the pigmeat sector in **Brazil, Chile** and **Colombia** while, in **Argentina**, sporadic restrictions on pigmeat imports from Brazil are creating incentives for investment. The recognition of **Mexico** as free of classical swine fever has opened new market access opportunities which, combined with investment in new breeding lines, supports an increase of the country's production and exports in 2012.

Anticipation of new EU environmental regulations that will become effective in 2013 has catalyzed a restructuring and concentration of hog operations that may translate into fewer pigs and lower production in 2012. Despite tight margins, a shift by consumers in **North America** from beef to lower priced meat products is expected to strengthen demand and translate into higher production. Investment-driven gains in the **Russian Federation** are foreseen to boost production by 5 percent despite persistent occurrences of African swine fever.

Pigmeat trade may decline in 2012, as Asian import demand falters

After witnessing double-digit increases in Asian import demand in 2011 due to its disease-reduced output, improved production in the region is forecast to result in global pigmeat trade falling to 7.0 million tonnes in 2012. Reduced purchases by **China,** the **Republic of Korea** and **Japan**, amid large supplies, underlie this expected contraction. This is despite the expected ratification by the **Russian Federation** of the WTO accession treaty later this year and the signing of a free trade agreement between the **Republic of Korea** and the **United States**. It is clear that the **Russian Federation** will only ease restrictions on pigmeat imports when it officially joins the WTO in mid-2012. Until then, imports by the country will be negatively affected by a reduction of its tariff-rate import quota from 470 000 tonnes in 2011 to 400 000 tonnes this year, which may result in smaller pigmeat purchases. By contrast, imports by **Chile, Colombia, Mexico** and **Uruguay** look set to increase**,** while **Argentina's** "off-and-on" restrictions on imports of Brazilian product may lower deliveries to the country.

Declining trade prospects in 2012 set the stage for considerable competition among the major exporters – the **United States,** the **EU, Canada** and **Brazil** – which together account for nearly 90 percent of global trade. Lingering Russian restrictions on imports of Brazilian products may contribute to lower exports from **Brazil** in 2012, while benefiting smaller international suppliers, such as **Chile** and **Mexico,** but also the **United States** and **Canada**.

POULTRY MEAT

Poor returns to limit production growth in 2012

Growth of the poultry sector, historically one of the most dynamic meats, is being dampened by high feed prices, the resurgence of avian influenza (AI) outbreaks in Asia and on-going trade disputes. As a result, global output is forecast to rise by only 2 percent to 103.5 million tonnes in 2012. Much of the increase will likely originate in Asia, in particular in **China, India, Japan,** the **Republic of Korea** and **Turkey**. However, escalating cases of AI, with a record seven countries in Asia reporting outbreaks in February, clouds the region's production outlook. In **Bangladesh**, an estimated 6 000 poultry farms have closed since the beginning of the year because of AI and high feed costs. In Africa, the spread of AI to **Egypt** in early 2012 is expected to hinder the development of the sector in the course of the year.

Declining output in the **United States**, as indicated by falling chick placements in early 2012, and only slight gains in the **EU** point to prospects for stable production in developed countries. However, the sector is forecast to grow by 6 percent to 3.0 million tonnes in the **Russian Federation**, which has launched ten new investment projects. Despite producer concerns about sliding poultry prices in early 2012, **Brazil's** output is forecast to edge up by 3 percent to 12 million tonnes, while vertical integration and high prices for other meats are supporting a 2 percent increase in output to 2.9 million tonnes in **Mexico**. In Africa, despite investments in some countries such as **Namibia**, high feed prices and rising imports are hindering production growth in **Ghana, Angola, Benin** and the **Congo**. At the same time, imposition of anti-dumping duties on poultry originating in the United States and Brazil is keeping **South Africa**'s output on an upward trend.

Poultry trade outlook dominated by policy uncertainties

Despite the imposition of import restrictions by several countries, world poultry trade is forecast to rise by 3 percent to 13.0 million tonnes in 2012, with expansion expected to be sustained by larger deliveries to **Hong Kong SAR**, **Vietnam** and **Indonesia,** as well as **Saudi Arabia** and the **United Arab Emirates**. Imports by **Saudi Arabia**, the third largest market after Hong Kong SAR and Japan, will be influenced by the status of a government fodder subsidy granted to national poultry operations in 2011, the depletion of which is pushing up poultry prices and stimulating import demand. Deliveries to the **Russian Federation**, which was the world's largest market until the imposition of restrictive import measures four years ago, are expected to edge up somewhat, following a WTO-induced increase in the poultry tariff-rate quota. Rising domestic demand will continue to boost imports by African countries, in particular **Egypt, Angola, Benin**, and **Ghana,** with the resultant regional dependency on imports now estimated at 24 percent of domestic consumption, compared to 18 percent in 2009. Import growth in Latin America and the Caribbean will be led by **Chile, Mexico** and **Venezuela**. By contrast, following the imposition of anti-dumping duties on poultry originating in the United States, **China** may buy less, although part of the product delivered to Hong Kong SAR is likely to be re-exported to the mainland. The application of anti-dumping tariffs on Brazilian product by **South Africa** is likely to negatively influence Brazil's deliveries to South Africa in 2012, while improved domestic availability is forecast to depress purchases by **Japan**. The continued imposition by **India,** a minor importer, of non-tariff barriers on poultry and the resulting request by the US for consultations under the dispute settlement provisions of the World Trade Organization (WTO) is illustrative of the multiple constraints facing international poultry trade.

As for poultry meat exports, a return to a more favourable exchange rate may support a 2 percent increase in **Brazilian** shipments, despite the slow relisting of Brazilian poultry plants by the Russian Federation. Exports from **Thailand** will be supported by the EU's April decision to lift an 8-year ban on raw poultry shipments by mid-year. Similarly, sales by **Turkey** are likely to be boosted by the granting of access to the **Saudi Arabian** market, after a 6-year ban. Strong regional demand, particularly from Chile and Venezuela, are sustaining a steady growth in shipments from **Argentina**. On the other hand, limited domestic supplies and more restricted access to markets may dampen growth in the **United States** to less than 1 percent and even result in declining shipments by the **EU**.

OVINE MEAT

Prices stabilize as higher output relieves market tightness

The tight global supplies that characterized sheepmeat markets in 2011 are easing slightly as production edges up 1 percent to 13.6 million tonnes. Most of the output gains will be derived from the non-meat trading countries in Africa and Asia, in particular **Sudan, Nigeria, Ethiopia, India,** the **Islamic Republic of Iran, Pakistan** and **Turkey**. However, sheep prices in many African and Middle Eastern countries remain at near record levels, raising concerns about availability and affordability in a region where sheepmeat can represent as much as one-third of total meat consumption. In Oceania, good pasture and favourable lambing conditions in **Australia** and **New Zealand** have reversed four years of declining output, with production forecast to rise by 3 percent. Drought conditions in the **United States** have exacted a toll on sheep numbers while a lingering contraction of output in the **EU** is expected to boost imports after two years of decline.

Sheepmeat trade to increase as production recovers in Oceania

Higher export availabilities in 2012 from **Australia** and **New Zealand**, the suppliers of over 80 percent of global trade, set the stage to reverse three years of declining global trade. Sheepmeat trade may edge up to 741 000 tonnes, supported by strong import demand. Export availabilities from some non-traditional exporting countries, such as **Argentina** and **Uruguay** will be limited by drought. Shipments from **Pakistan** may expand in response to strong demand and high prices in **Middle Eastern** countries. **EU** imports, which have declined two years in a row because of difficulties in procuring supplies from New Zealand, are estimated up slightly as are those by the **United States**. An expansion into the **Chinese** market will continue with import of sheepmeat cuts suitable to China's traditional hotpot cooking style. Live trade in sheep continues to support the Australian industry, although shipments to **Saudi Arabia**, traditionally one of the largest markets for Australian live sheep, have been declining for the past five years as a result of competition from East African nations, including **Sudan** and **Somalia**.

Table 16. Major Meat Market Policy Developments: November 2011- April 2012

Country	Product	Date	Policy Instrument	Description
Argentina	pork	Mar-12	Import restriction	Implemented import restrictions requiring exporters to apply for import licenses .
Azerbaijan	live cattle	Mar-12	Import access	Azerbaijan ports opened to Canadian live cattle exports.
Botswana	pork	Jan-12	Import Ban	Imposed import ban on South African pork and pig products after outbreak of African Swine Fever
China	live breeding animals, frozen embryos and semen	Nov-11	Import requirements	Announced new policy on all imports of breeding animals and frozen semen and embryos - must show three generations of pedigree (great grandparent, grandparent, and parent generations).
European Union	live animals	Nov-11	Animal welfare regulations	Review of the regulation on the animal welfare for animals during transport.
	poultry	Apr-12	Import Ban	Lifted the eight-year ban on the imports of fresh chicken meat from Thailand, effective July 1, after no bird flu case reported in Thailand for more than three consecutive years.
	pork, beef	Apr-12	Export subsidies	Cut export refunds on processed pork to zero; lowered export refunds on beef carcasses from Euro 244 (USD 321) to Euro 163 (USD 213) per tonne. Reduced rates also for deboned, fresh and other beef cuts.
Russian Federation, Kazakhstan, Belarus, Ukraine, Turkey, Egypt, Kuwait, Lebanon, Algeria, Jordan, Morocco, Japan, Mexico, Argentina, Uruguay and the U.S	livestock	Apr-12	Import restrictions	Restrictions on livestock and products imports from the EU imposed after Schmallenberg Virus outbreak.
Hong Kong SAR	poultry	Jan-12	Import Ban	Suspension of imports of live poultry and poultry products from parts of neighbouring Shenzhen (China) after an AI-related human fatality.
Indonesia	Beef	Jan-12	Import quota	Cut beef import quota for 2012, from 50 000 - 60 000 tonnes per year to 34 000 tonnes.
	Cattle			Lowed the quota for live cattle imports from 520 000 to 280 000 head.
Israel	poultry	Jan-12	subsidies	Confirmed continuation of poultry subsidies
Japan	poultry	Feb-12	import ban	Imposed import ban on Australian poultry following an outbreak of avian flu at a Victorian duck farm.
	poultry	Feb-12	import ban	Lifted an AI-induced import ban on US poultry coming from the state of North Carolina.
	beef	Apr-12	Import ban	Lifted an import suspension on a U.S. meat processing company after it ensured compliance with a US-Japan bilateral accord on managing bovine spongiform encephalopathy (BSE) disease risk in beef shipments
	beef	Apr-12	Import quota	Increased import quota for Mexican beef from the current 6 000 tonnes per year to 10,500 tonnes per year; (Preferential) tariff rates remain at 30.8 per cent for chilled and frozen boneless products
Kazakhstan	pork	Jan-12	import ban	Imposed import ban on pork from the Saratov and Orenburg regions of the Russian Federation because of African Swine fever

Country	Product	Date	Policy Instrument	Description
Korea, Rep. of - USA	beef	Mar-12	Free Trade agreement	Reduced tariff in the Republic of Korea on US beef imports from 40 percent, to 37.33 percent as free Trade Agreement between the Rep. of Korea and the US (KORUS) comes in force on 15 March 2012
Korea, Rep. of	beef	Jan-12	import ban	Lifted nine-year import ban on Canadian beef; the decision marks the official re-opening of the market since Canada's first case of BSE in 2003.
	pork	Mar-12	Import quota	Extended duty-free tariff-rate quota (TRQ) for chilled/frozen pork bellies for 70 000 tonnes, effective from April 1 - June 30, 2012.
	pork	Apr-12	Import quota	Reduced duty free tariff rate quota (TRQ) for fresh/frozen pork bellies from the initial 70 000 tonnes to 20 000 tonnes for the period April-June.
Kuwait	live animals (chicken), eggs	Dec-12	Import ban	Ban on imports of birds and eggs from the Islamic Republic of Iran following reports by the World Health Organization (WHO) indicating the presence of bird flu in the country
	live chicken, poultry, eggs	Mar-12	Import ban	Ban on imports of poultry, eggs and chicks from Sri Lanka and Australia
	poultry	Mar-12	Import ban	Lifted ban on imports of all US poultry products
Mexico	meat	Dec-11	Import requirements	New certification required on shipments of certain meat and poultry products from the United States.
	pork	Jan-12	Import restrictions	US pork plant in Iowa removed from eligible exporters list
Oman	poultry	Mar-12	Import ban	Imposed ban on imports of poultry from India based on the World Organization for Animal Health (OIE) norms
Paraguay	cattle and buffaloes	Jan-12	Animal Health regulations	Imposed mandatory vaccination against Foot and Mouth Disease (FMD). Cattle and buffaloes vaccinated from 1 February to 2 March 2012.
Russian Federation-Belarus-Kazakhstan	beef, pork, poultry	Dec-11	Import quota	Established 2012 tariff rate quotas on total meat and poultry under the Russian Federation-Belarus-Kazakhstan Customs Union. Total volumes lowered for the Russian Federation (pork and poultry), raised for Kazakhstan (pork and beef) and kept unchanged for Belarus.
		Dec-11		Convened Customs Union (CU) Commission on December 9, 2011, which decided adoption of the 2012 HS Nomenclature of the World Customs Organization and of technical regulations on "Food Products Labeling".
Russian Federation	beef, pork, poultry	Jan-12	Import quotas	Established beef, pork, poultry TRQs for 2012: 530 000 tonnes TRQ for frozen beef; 30 000 tonnes TRQ for fresh/chilled beef; 400 000 tonnes TRQ for pork plus 30 000 tonnes TRQ for pork trimmings; 330 000 tonnes TRQ for frozen poultry meat.
	poultry	Feb-12	Import ban lifted	Lifted import ban on Ukraine poultry produced by the Myronivska poultry farm (Kaniv, Cherkasy region). The ban had been temporarily imposed on October 18, 2010 due to violations of sanitary and veterinary regulations.
	protein feeds of animal origin	Mar-12	Import ban	Lifted ban on imports of protein feeds of animal origin from all EU countries as of 26 March 2012.
	live animals	Mar-12	Import ban	Imposed ban on imports of live cattle, pig, sheep and goats from the EU as of March 20 due to the Schmallenberg virus outbreak.
Saudi Arabia	poultry	Jan-12	Import ban lifted	Lifted import ban on poultry from Turkey which had been in place since the last outbreak of the bird flu epidemic in 2005

Country	Product	Date	Policy Instrument	Description
South Africa	poultry	Mar-12	Import Duty	Imposed provisional anti-dumping tariffs of 6 to 63 percent on imports of Brazilian whole frozen chickens and boneless poultry cuts. Duties to be applied for a 26-week period until a preliminary dumping investigation by the International Trade Administration Commission of South Africa - ITAC) completed.
Swaziland	pork	Feb-12	Import Ban	Imposed import ban on South African pork and pig products after outbreak of African Swine Fever
Turkey	cattle	Apr-12	Import requirements	Suspended release of import licenses on cattle from the EU after Schmallenberg virus outbreak
United States	meat	Nov-11	Marketing requirements	U.S. law on mandatory country-of-origin labelling (COOL) requirements for livestock and meat (among other products) declared by the World Trade Organization (WTO) to be barriers to trade.
	pork	Jan-12	Import ban lifted	Import ban on Brazilian pork imports from Santa Caterina state lifted.
	meat	Mar-12	Marketing requirements	The US filed an appeal with the WTO disputing the ruling indicating that some provisions of the U.S. law on mandatory country of origin (COOL) labeling were barriers to trade
Uruguay	cattle genetic material	Mar-12	Import ban	Temporary suspended imports of genetic material (ruminant semen and embryos) from European countries due to the outbreak of Schmallenberg virus.

Table A14. Total meat statistics[1] *(thousand tonnes, carcass weight equivalent)*

	Production		Imports		Exports		Utilization	
	2011 *estim.*	2012 *f'cast*	2011 *estim.*	2012 *f'cast*	2011 *estim.*	2012 *f'cast*	2011 *estim.*	2012 *f'cast*
ASIA	**123 402**	**127 687**	**14 214**	**14 531**	**4 364**	**4 870**	**133 251**	**137 348**
China	79 931	82 536	3 847	4 065	1 887	2 105	81 892	84 496
of which Hong Kong, SAR	188	190	2 391	2 714	896	1 073	1 683	1 831
India	7 433	8 068	3	3	1 088	1 305	6 348	6 766
Indonesia	3 024	3 071	90	90	5	5	3 109	3 156
Iran, Islamic Republic of	2 654	2 713	258	261	28	28	2 884	2 946
Japan	3 117	3 177	3 149	3 100	7	13	6 260	6 265
Korea, Republic of	1 783	2 072	1 186	1 041	32	33	2 937	3 080
Malaysia	1 692	1 733	234	249	37	40	1 889	1 942
Pakistan	2 657	2 721	4	4	46	52	2 616	2 674
Philippines	2 809	2 839	339	348	22	23	3 126	3 164
Saudi Arabia	749	759	963	1 028	16	19	1 695	1 768
Singapore	115	116	307	324	26	29	396	410
Thailand	2 377	2 412	26	27	754	773	1 648	1 666
Turkey	2 228	2 318	203	217	256	286	2 174	2 249
Viet Nam	3 947	4 099	920	977	20	22	4 847	5 054
AFRICA	**16 118**	**16 278**	**2 287**	**2 420**	**131**	**129**	**18 274**	**18 569**
Algeria	613	617	64	71	1	1	677	688
Angola	170	173	471	496	-	-	641	669
Egypt	1 710	1 623	310	331	5	5	2 014	1 949
Nigeria	1 385	1 406	1	1	-	-	1 386	1 407
South Africa	3 013	3 074	414	417	31	32	3 395	3 459
CENTRAL AMERICA	**8 651**	**8 777**	**2 523**	**2 714**	**478**	**537**	**10 696**	**10 954**
Cuba	276	272	258	272	-	-	534	544
Mexico	6 012	6 109	1 537	1 666	222	270	7 328	7 504
SOUTH AMERICA	**38 396**	**39 205**	**1 048**	**1 154**	**7 310**	**7 475**	**32 134**	**32 884**
Argentina	4 723	4 885	75	62	530	569	4 268	4 378
Brazil	24 443	25 059	44	44	5 976	6 106	18 510	18 996
Chile	1 395	1 422	267	275	275	279	1 387	1 419
Colombia	2 146	2 148	79	86	11	9	2 214	2 226
Uruguay	630	620	25	28	318	304	336	344
Venezuela	1 583	1 547	476	572	-	-	2 059	2 119
NORTH AMERICA	**46 760**	**46 134**	**2 197**	**2 274**	**9 277**	**9 309**	**39 680**	**39 099**
Canada	4 351	4 397	720	716	1 742	1 751	3 329	3 361
United States of America	42 408	41 736	1 465	1 547	7 535	7 558	36 338	35 725
EUROPE	**57 970**	**57 855**	**4 359**	**4 432**	**4 463**	**4 295**	**57 866**	**57 993**
Belarus	1 008	1 039	133	132	277	285	863	886
European Union	45 564	45 083	1 430	1 457	3 999	3 833	42 995	42 707
Russian Federation	7 181	7 462	2 129	2 155	30	31	9 281	9 586
Ukraine	2 117	2 112	187	185	77	68	2 227	2 229
OCEANIA	**5 915**	**6 044**	**389**	**393**	**2 499**	**2 583**	**3 805**	**3 853**
Australia	4 136	4 189	199	201	1 671	1 707	2 664	2 682
New Zealand	1 290	1 363	52	53	825	874	517	542
WORLD	**297 212**	**301 980**	**27 017**	**27 918**	**28 522**	**29 199**	**295 707**	**300 700**
Developing countries	177 485	182 685	15 999	16 758	12 228	12 948	181 257	186 494
Developed countries	119 727	119 296	11 018	11 161	16 295	16 250	114 450	114 206
LIFDCs	112 369	115 961	4 592	4 685	2 627	2 904	114 334	117 741
LDCs	8 922	9 095	1 292	1 376	3	3	10 211	10 468

[1] Including "other meat".

Table A15. Bovine meat statistics *(thousand tonnes, carcass weight equivalent)*

	Production		Imports		Exports		Utilization	
	2011 *estim.*	2012 *f'cast*	2011 *estim.*	2012 *f'cast*	2011 *estim.*	2012 *f'cast*	2011 *estim.*	2012 *f'cast*
ASIA	**17 108**	**17 625**	**3 300**	**3 364**	**1 406**	**1 628**	**18 952**	**19 321**
China	6 488	6 487	401	400	167	179	6 722	6 708
India	3 172	3 505	1	1	1 077	1 293	2 096	2 213
Indonesia	480	482	84	84	1	1	563	565
Iran, Islamic Republic of	415	420	194	195	1	1	608	614
Japan	505	500	740	740	2	2	1 222	1 247
Korea, Republic of	349	443	382	367	4	4	696	754
Malaysia	30	31	157	174	9	10	178	195
Pakistan	1 450	1 470	2	2	30	35	1 422	1 437
Philippines	300	310	118	122	5	5	413	427
AFRICA	**5 823**	**5 811**	**520**	**546**	**71**	**70**	**6 272**	**6 286**
Algeria	135	137	60	65	-	-	195	202
Angola	106	107	80	80	-	-	186	187
Egypt	714	628	235	250	1	1	948	877
South Africa	920	950	13	15	11	13	923	952
CENTRAL AMERICA	**2 548**	**2 567**	**438**	**466**	**313**	**366**	**2 673**	**2 667**
Mexico	1 820	1 825	272	316	111	155	1 981	1 986
SOUTH AMERICA	**15 054**	**15 269**	**411**	**475**	**2 018**	**2 075**	**13 447**	**13 668**
Argentina	2 530	2 600	2	2	220	231	2 312	2 371
Brazil	9 400	9 600	35	35	1 300	1 350	8 136	8 285
Chile	190	190	167	165	11	10	346	345
Colombia	930	930	2	2	6	4	926	928
Uruguay	505	500	-	-	290	280	215	220
Venezuela	450	380	188	254	-	-	638	634
NORTH AMERICA	**13 170**	**12 672**	**1 114**	**1 185**	**1 675**	**1 693**	**12 640**	**12 162**
Canada	1 170	1 200	264	262	379	410	1 055	1 052
United States of America	12 000	11 472	848	922	1 296	1 283	11 583	11 109
EUROPE	**11 065**	**10 736**	**1 223**	**1 308**	**544**	**447**	**11 744**	**11 597**
European Union	8 253	7 948	320	352	327	232	8 246	8 068
Russian Federation	1 622	1 598	785	824	8	8	2 399	2 414
Ukraine	385	380	8	8	10	5	383	383
OCEANIA	**2 753**	**2 815**	**57**	**59**	**1 756**	**1 814**	**1 018**	**1 045**
Australia	2 133	2 145	13	14	1 295	1 315	817	829
New Zealand	600	650	11	12	460	497	151	165
WORLD	**67 522**	**67 494**	**7 063**	**7 403**	**7 784**	**8 092**	**66 747**	**66 747**
Developing countries	37 456	38 140	3 788	3 959	3 795	4 123	37 421	37 927
Developed countries	30 065	29 354	3 275	3 444	3 988	3 970	29 326	28 820
LIFDCs	18 899	19 268	805	830	1 548	1 784	18 156	18 314
LDCs	3 271	3 324	164	172	1	1	3 434	3 495

Table A16. Ovine meat statistics *(thousand tonnes, carcass weight equivalent)*

	Production		Imports		Exports		Utilization	
	2011 *estim.*	2012 *f'cast*	2011 *estim.*	2012 *f'cast*	2011 *estim.*	2012 *f'cast*	2011 *estim.*	2012 *f'cast*
ASIA	**7 870**	**7 933**	**363**	**350**	**37**	**35**	**8 196**	**8 248**
Bangladesh	250	255	-	-	-	-	250	255
China	3 903	3 903	124	123	9	9	4 018	4 018
India	725	730	-	-	-	-	725	730
Iran, Islamic Republic of	500	502	-	-	-	-	500	502
Pakistan	450	467	-	-	13	14	437	453
Saudi Arabia	85	90	45	40	2	2	128	128
Syria	210	215	-	-	-	-	210	215
Turkey	290	285	1	1	-	-	291	286
AFRICA	**2 806**	**2 854**	**32**	**32**	**25**	**25**	**2 813**	**2 860**
Algeria	196	198	1	1	-	-	197	199
Nigeria	445	450	-	-	-	-	445	450
South Africa	175	175	7	7	-	-	182	181
Sudan	515	520	-	-	-	-	515	520
CENTRAL AMERICA	**124**	**125**	**22**	**18**	**-**	**-**	**146**	**142**
Mexico	101	103	11	6	-	-	112	109
SOUTH AMERICA	**322**	**324**	**5**	**5**	**23**	**20**	**304**	**309**
Brazil	113	115	5	5	-	-	118	119
NORTH AMERICA	**87**	**83**	**102**	**101**	**10**	**9**	**179**	**175**
United States of America	71	68	82	82	10	9	143	140
EUROPE	**1 299**	**1 289**	**201**	**204**	**21**	**19**	**1 479**	**1 474**
European Union	984	968	181	184	14	12	1 151	1 140
Russian Federation	193	198	9	10	-	-	202	207
OCEANIA	**971**	**997**	**29**	**29**	**615**	**632**	**387**	**394**
Australia	523	533	1	1	286	292	238	242
New Zealand	448	464	2	2	329	340	122	125
WORLD	**13 479**	**13 606**	**755**	**738**	**731**	**741**	**13 504**	**13 602**
Developing countries	10 367	10 468	420	402	84	80	10 704	10 790
Developed countries	3 112	3 138	334	336	647	661	2 801	2 812
LIFDCs	8 807	8 903	124	133	24	25	8 907	9 012
LDCs	1 843	1 880	11	12	-	-	1 853	1 891

Table A17. Pigmeat statistics *(thousand tonnes, carcass weight equivalent)*

	Production		Imports		Exports		Utilization	
	2011 *estim.*	2012 *f'cast*	2011 *estim.*	2012 *f'cast*	2011 *estim.*	2012 *f'cast*	2011 *estim.*	2012 *f'cast*
ASIA	**60 335**	**62 780**	**3 577**	**3 394**	**365**	**364**	**63 569**	**65 827**
China	50 232	52 309	1 265	1 193	306	301	51 191	53 201
of which Hong Kong, SAR	126	128	618	625	44	38	700	715
India	490	487	1	1	1	1	490	487
Indonesia	680	690	1	1	-	-	681	691
Japan	1 255	1 280	1 275	1 270	1	1	2 546	2 549
Korea, D.P.R.	110	110	2	2	-	-	112	112
Korea, Republic of	823	988	646	530	1	1	1 478	1 536
Malaysia	240	250	17	17	3	3	254	264
Philippines	1 630	1 626	96	95	3	3	1 723	1 718
Thailand	850	850	2	2	22	23	830	829
Viet Nam	3 040	3 192	43	45	20	22	3 059	3 214
AFRICA	**1 277**	**1 321**	**225**	**237**	**8**	**8**	**1 494**	**1 550**
Madagascar	56	56	-	-	-	-	56	56
Nigeria	235	240	-	-	-	-	235	240
South Africa	358	376	42	45	3	3	397	419
Uganda	115	117	1	1	-	-	116	118
CENTRAL AMERICA	**1 683**	**1 718**	**692**	**752**	**111**	**114**	**2 264**	**2 356**
Cuba	168	166	38	42	-	-	206	208
Mexico	1 192	1 225	505	548	90	91	1 607	1 682
SOUTH AMERICA	**5 123**	**5 233**	**146**	**142**	**787**	**790**	**4 483**	**4 585**
Argentina	290	305	58	45	1	1	347	349
Brazil	3 258	3 323	1	1	648	648	2 611	2 676
Chile	528	535	19	20	137	141	410	414
Colombia	181	182	20	25	-	-	201	207
Venezuela	174	178	8	8	-	-	182	186
NORTH AMERICA	**12 256**	**12 477**	**662**	**668**	**3 440**	**3 440**	**9 451**	**9 700**
Canada	1 923	1 929	224	220	1 161	1 140	985	1 009
United States of America	10 333	10 548	433	443	2 279	2 300	8 460	8 686
EUROPE	**27 796**	**27 712**	**1 253**	**1 226**	**2 343**	**2 283**	**26 706**	**26 655**
Belarus	410	420	115	115	55	55	470	480
European Union	23 210	22 978	19	18	2 242	2 188	20 988	20 808
Russian Federation	2 400	2 527	862	835	2	2	3 260	3 360
Serbia	480	514	10	12	8	9	482	517
Ukraine	680	640	115	116	17	13	778	743
OCEANIA	**482**	**489**	**231**	**232**	**40**	**43**	**673**	**681**
Australia	342	347	176	176	39	42	479	483
Papua New Guinea	68	68	7	6	-	-	75	74
WORLD	**108 951**	**111 731**	**6 787**	**6 652**	**7 092**	**7 042**	**108 640**	**111 354**
Developing countries	66 607	69 196	3 293	3 177	1 266	1 272	68 639	71 118
Developed countries	42 345	42 534	3 494	3 475	5 826	5 770	40 001	40 236
LIFDCs	53 907	56 020	1 090	1 018	327	330	54 670	56 707
LDCs	1 261	1 285	161	169	1	1	1 421	1 453

Table A18. Poultry meat statistics *(thousand tonnes, carcass weight equivalent)*

	Production		Imports		Exports		Utilization	
	2011 *estim.*	2012 *f'cast*	2011 *estim.*	2012 *f'cast*	2011 *estim.*	2012 *f'cast*	2011 *estim.*	2012 *f'cast*
ASIA	**36 128**	**37 374**	**6 921**	**7 309**	**2 524**	**2 798**	**40 514**	**41 883**
China	17 858	18 378	2 052	2 344	1 390	1 600	18 520	19 121
of which Hong Kong, SAR	46	47	1 501	1 800	777	954	770	893
India	2 900	3 200	2	1	9	10	2 893	3 191
Indonesia	1 728	1 760	1	1	-	-	1 729	1 761
Iran, Islamic Republic of	1 723	1 775	63	65	26	26	1 760	1 814
Japan	1 345	1 385	1 098	1 054	4	10	2 429	2 429
Korea, Republic of	600	630	145	130	27	28	718	731
Kuwait	47	49	200	200	1	1	246	248
Malaysia	1 420	1 450	41	42	24	27	1 437	1 465
Saudi Arabia	580	585	750	800	3	5	1 327	1 380
Singapore	95	95	137	145	11	12	221	228
Thailand	1 260	1 300	2	3	695	715	568	588
Turkey	1 620	1 720	90	95	242	270	1 468	1 545
Yemen	147	149	105	100	-	-	252	249
AFRICA	**4 813**	**4 882**	**1 479**	**1 569**	**20**	**19**	**6 271**	**6 433**
Angola	8	8	280	300	-	-	288	308
South Africa	1 537	1 550	351	350	11	10	1 876	1 890
CENTRAL AMERICA	**4 175**	**4 247**	**1 354**	**1 438**	**52**	**56**	**5 477**	**5 629**
Cuba	34	35	185	190	-	-	219	224
Mexico	2 798	2 854	739	782	19	23	3 517	3 613
SOUTH AMERICA	**17 572**	**18 071**	**484**	**531**	**4 415**	**4 522**	**13 642**	**14 080**
Argentina	1 724	1 800	14	15	271	300	1 467	1 515
Brazil	11 641	11 990	2	3	4 004	4 084	7 639	7 909
Chile	650	670	81	90	117	118	614	642
Venezuela	950	980	280	310	-	-	1 230	1 290
NORTH AMERICA	**21 000**	**20 654**	**309**	**308**	**4 114**	**4 129**	**17 236**	**16 831**
Canada	1 220	1 230	209	211	182	182	1 248	1 259
United States of America	19 780	19 424	94	92	3 931	3 947	15 983	15 567
EUROPE	**16 615**	**16 922**	**1 520**	**1 529**	**1 472**	**1 461**	**16 663**	**16 990**
European Union	12 075	12 147	809	803	1 335	1 319	11 550	11 631
Russian Federation	2 876	3 048	429	440	19	20	3 286	3 468
Ukraine	1 001	1 041	63	60	50	50	1 014	1 051
OCEANIA	**1 292**	**1 322**	**67**	**68**	**46**	**54**	**1 310**	**1 339**
Australia	1 117	1 142	8	8	39	45	1 084	1 108
New Zealand	150	155	1	1	7	9	143	147
WORLD	**101 594**	**103 473**	**12 133**	**12 752**	**12 643**	**13 039**	**101 113**	**103 184**
Developing countries	59 029	60 845	8 411	9 041	6 980	7 360	60 460	62 526
Developed countries	42 566	42 627	3 722	3 711	5 663	5 680	40 653	40 658
LIFDCs	27 474	28 463	2 534	2 664	697	735	29 310	30 392
LDCs	1 922	1 975	932	998	-	1	2 853	2 973

Table A27. Selected international meat prices and FAO meat price indices

Period	Bovine meat prices (USD per tonne)			Ovine meat price (USD per tonne)	Pig meat prices (USD per tonne)		
	Australia	United States	Brazil	New Zealand	United States	Brazil	Germany
Annual (Jan/Dec)							
2005	2 617	3 919	1 967	4 439	2 161	2 094	1 830
2006	2 547	3 803	2 219	4 033	1 986	2 134	1 935
2007	2 603	4 023	2 367	4 120	2 117	2 200	1 907
2008	3 138	4 325	3 785	4 585	2 270	3 000	2 364
2009	2 636	3 897	3 118	4 276	2 202	2 223	2 035
2010	3 351	4 378	3 919	5 045	2 454	2 747	1 913
2011	4 041	4 516	4 816	6 631	2 648	3 023	2 169
Monthly							
2011 - February	4 050	4 528	4 719	6 414	2 493	2 820	1 977
2011 - March	4 140	4 594	4 746	6 424	2 561	2 927	2 120
2010 - April	4 250	4 452	4 857	6 622	2 694	3 085	2 305
2010 - May	4 030	4 438	5 006	6 660	2 701	3 033	2 300
2010 - June	3 900	4 508	4 791	6 772	2 717	3 124	2 299
2011 - July	3 950	4 263	4 852	6 907	2 611	2 836	2 296
2011 - August	3 990	4 508	4 997	6 995	2 679	2 865	2 267
2011 - September	3 870	4 528	4 927	6 692	2 749	2 971	2 173
2011 - October	3 860	4 490	4 768	6 663	2 729	3 165	2 170
2011 - November	4 165	4 716	4 824	6 636	2 693	3 304	2 233
2011 - December	4 192	4 835	4 642	6 507	2 749	3 148	2 144
2012 - January	4 196	4 910	4 598	6 426	2 658	2 817	1 992
2012 - February	4 277	5 050	4 649	6 456	2 772	2 802	2 149

Bovine meat prices:
Australia: up to Oct02 : cow forequarters frozen boneless, 85% chemical lean, cif US port (East Coast) ex-dock; from Nov02: chucks and cow forequarters
USA: Frozen beef, export unit value
Brazil: Frozen beef, export unit value

Ovine meat prices
New Zealand: Lamb, frozen whole carcasses,wholesale price Smithfield Mkt. London

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