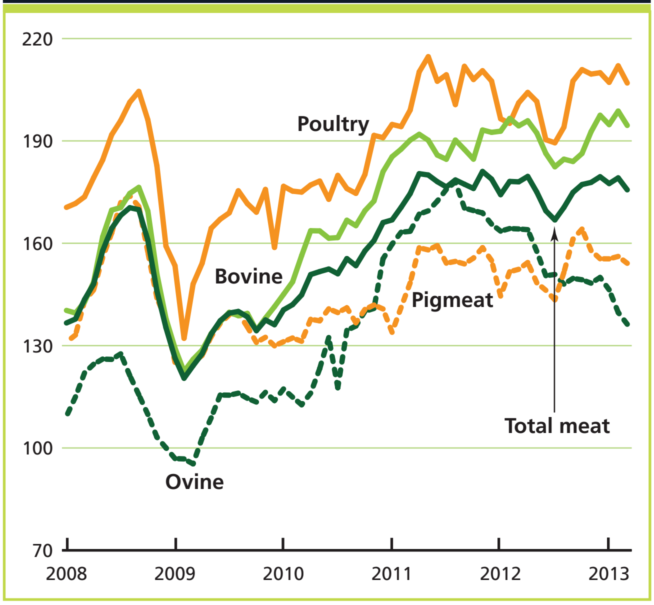
MEAT AND MEAT PRODUCTS

World meat production is anticipated to grow modestly in 2013, when it is forecast to reach 308.2 million tonnes, an increase of 4.3 million tonnes or 1.4 percent compared to 2012. In many countries, producers continue to struggle against elevated feed prices; however, although remaining high by historical standards, they began to fall during the second half of 2012 and continued to diminish during 2013. This has offered greater scope for profitable meat production, particularly in the pig and poultry sectors, which are the most dependent on concentrated feed. Meat production is anticipated to grow most vigorously in the developing countries, which are the main centres of demand expansion.

Meat prices have remained at historically high levels since the early part of 2011. The FAO Meat Price Index averaged 179 in May 2013, having moved within the narrow band of 177–179 since October 2012. Export reference prices for the different types of meat have followed varying directions so far this year, rising marginally for poultry and pork, remaining largely stable for beef and falling for ovine meat.

Meat trade is expected to grow more slowly in 2013 than in recent years, as a result of adequate national supplies in a number of importing countries and a reduction in production among some of the major exporters. Global meat exports are anticipated to reach 30.2 million tonnes in 2013, an increase of 1.1 percent over 2012.

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



WORLD MEAT MARKET AT A GLANCE

	2011	2012 *estim.*	2013 *f'cast*	Change: 2013 over 2012
		million tonnes		%
WORLD BALANCE				
Production	**297.6**	**303.9**	**308.2**	**1.4**
Bovine meat	67.3	67.6	68.1	0.9
Poultry meat	102.1	104.6	106.4	1.8
Pigmeat	109.0	112.5	114.2	1.5
Ovine meat	13.5	13.6	13.8	1.2
Trade	**29.2**	**29.9**	**30.2**	**1.1**
Bovine meat	8.1	8.2	8.6	4.6
Poultry meat	12.8	13.1	13.3	1.5
Pigmeat	7.3	7.5	7.2	-4.1
Ovine meat	0.7	0.8	0.9	5.8
SUPPLY AND DEMAND INDICATORS				
Per caput food consumption:				
World (kg/yr)	42.5	43.0	43.1	0.4
Developed (kg/yr)	78.7	79.1	79.3	0.3
Developing (kg/yr)	32.5	33.1	33.3	0.7

FAO MEAT PRICE INDEX (2002-2004=100)	**2011**	**2012**	**2013** *Jan-May*	**Change: Jan-May 2013 over Jan-May 2012 %**
	177	175	179	0.9

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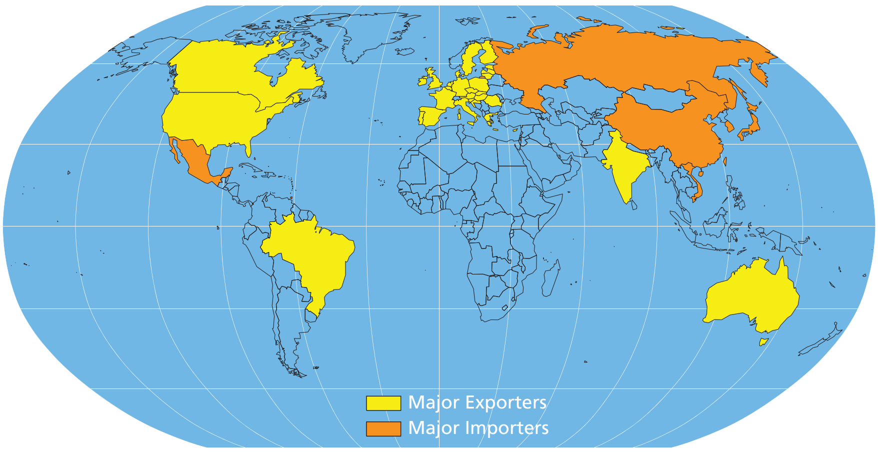
MEAT AND MEAT PRODUCTS

Major Meat Exporters and Importers



Moderate meat production growth; trade to slow

World meat production, is anticipated to grow modestly in 2013 to 308.2 million tonnes, an increase of 4.3 million tonnes or 1.4 percent compared with 2012. In many countries, producers continue to struggle against elevated feed prices; however, although remaining high by historical standards, they began to fall during the second half of 2012 and have continued to diminish during 2013. This has offered greater scope for profitable meat production, particularly in the pig and poultry sectors, which are the most dependent on concentrated feed. Meat production is anticipated to grow the most vigorously in the developing countries, which are the main centres of demand growth.

Meat prices have remained at historically high levels since the early part of 2011. The **FAO Meat Price Index** averaged 179 in May 2013, having moved within the narrow band of 177–179 since October 2012. Export reference prices for the different types of meat have followed varying directions so far this year, rising marginally for poultry and pork, remaining largely stable for beef, and falling for ovine meat.

Meat trade is expected to grow more slowly in 2013 than in recent years due to adequate national supplies in a number of importing countries and a reduction in production among some of the major exporters. Global meat exports are anticipated to rise to 30.2 million tonnes in 2013, an increase of 1.1 percent over 2012.

BOVINE MEAT

Herd rebuilding over the past two years promotes production growth in 2013

Bovine meat production is forecast to reach 68.1 million tonnes in 2013, representing a further increase over 2012, which had followed two years of stagnation in 2010 and 2011. The resurgence in output is being led by the developing countries, which collectively account for almost 60 percent of the world total, while

Figure 1. Gains in global meat trade in 2013

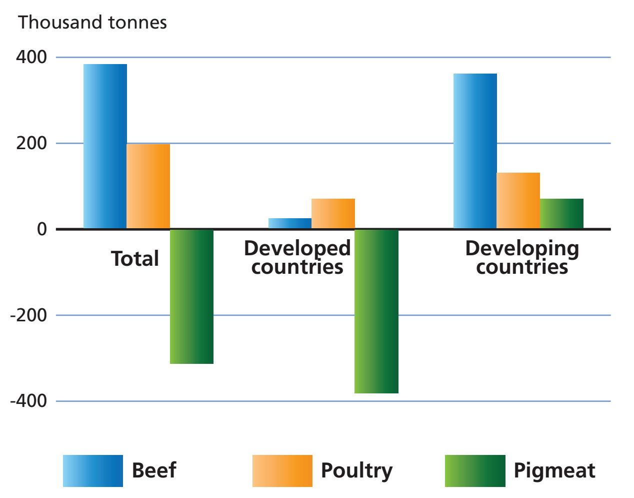


Table 1. World meat market at a glance

	2011	2012 *estim.*	2013 *f'cast*	Change: 2013 over 2012
	million tonnes			%
WORLD BALANCE				
Production	**297.6**	**303.9**	**308.2**	**1.4**
Bovine meat	67.3	67.6	68.1	0.9
Poultry meat	102.1	104.6	106.4	1.8
Pigmeat	109.0	112.5	114.2	1.5
Ovine meat	13.5	13.6	13.8	1.2
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Bovine meat	8.1	8.2	8.6	4.6
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Pigmeat	7.3	7.5	7.2	-4.1
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FAO MEAT PRICE INDEX (2002-2004=100)	**2011**	**2012**	**2013** *Jan-May*	**Change: Jan-May 2013 over Jan-May 2012 %**
	177	175	179	0.9

climatic factors have restrained beef production in many developed countries.

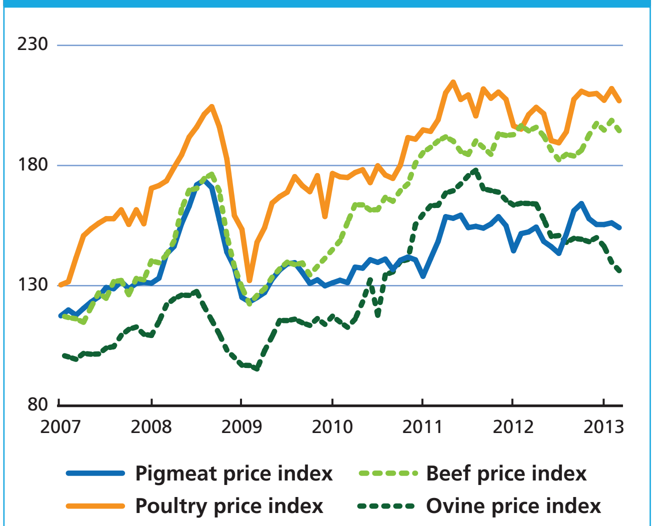
In South America, cattle availabilities and slaughter have been rising, particularly in **Argentina**, **Brazil**, **Paraguay** and **Uruguay**, following two years of herd rebuilding. For **Argentina**, this process may be amplified in 2013, due to an augmentation of slaughter rates in the face of higher production costs. In addition, as a result of government-imposed restrictions on exports, external market demand is less of a factor in expanding meat production than in neighbouring Paraguay and Uruguay. In **Brazil**, the world's second largest beef producer after the US, production is expected to reach a record 9.5 million tonnes, as pasture conditions are good, the industry is improving its management practices, and international demand is strong.

In Asia, **India**, the fifth largest bovine meat producer, is anticipated to show additional production growth, as is **Vietnam**, thanks to its investments in new processing operations. Beef output is forecast to continue to increase in the **Republic of Korea**, reflecting government slaughter subsidies and challenges to profitability in the light of low-priced domestic pork. In **China**, production is expected to remain around 6.5 million tonnes, which is similar to the previous three years, as the sector comes to terms with labour shortages and high production costs that have led many small-scale producers to cease operations.

For Africa, bovine meat production in **Egypt** could show limited recovery in 2013, following extensive culling due to a foot-and-mouth disease (FMD) outbreak in 2012. Output in **South Africa** is also anticipated to increase. Elsewhere in the region, weather conditions have generally been favourable for pasture growth and feed grains – presenting the prospect of rising beef production for the continent overall.

In developed countries, production of bovine meat is anticipated to be constrained in a number of the principal producers, offsetting some of the growth in the developing countries. In the **United States**, the world's largest beef producer, output is expected to fall by 3 percent. This is due to a drop in cattle slaughtered – a situation that stems from a decline in the production of calves linked to drought-related herd reduction. US producers also have had to cope with elevated feed costs. The same factors are expected to cause a similar decline in production in neighbouring **Canada**. In the **EU**, the world's third largest beef producer, production is expected to contract to 7.6 million tonnes. However, it will be at 0.5 percent, a much slower rate than the 4 percent fall in 2012, which perhaps represents a slowing of the long-term decline in the Union's cattle herd amidst some indications that production may grow in 2014. In Oceania, dry conditions in recent months and the carry-over effect of higher feed costs in 2012 are anticipated to raise slaughter rates and boost production in both **Australia** and **New Zealand**. In the **Russian Federation**, reduced profitability is expected to lead to further herd reduction, with a resultant increase in beef production. In

Figure 2. Limited supplies and elevated feed costs sustain meat prices



Japan, bovine meat output is projected to remain stable at around the 0.5 million tonne mark.

Trade in bovine meat to rise: Brazil and India vie for premier exporter position

Although for the past two years, prices have been at the highest levels of the past two decades, trade in bovine meat increased in 2012 and is expected to register further growth in 2013, with world exports expanding by 4 percent to 8.6 million tonnes. A shortage of domestic supplies in a number of countries has been an important contributor to the trade expansion.

Marked increases in imports are expected for the **United States**, the world's largest beef importer (and a major exporter) and, to a lesser degree for **Canada**, to compensate for domestic shortfalls. Demand from **China** is also anticipated to remain firm and imports may increase by over 20 percent compared to 2012 levels – especially as some consumers switch from poultry to other meat, following an outbreak of avian influenza. Elsewhere in Asia, imports by **Japan**, **Malaysia** and **Vietnam** are expected to increase moderately, while purchases by the **Republic of Korea** are anticipated to remain depressed, as a consequence of ample domestic supplies and price competition from other types of meat. Deliveries to the **Russian Federation**, the second largest importer, could also be below those of the previous year, as a result of a rise in domestic supplies. In the **EU**, 2013 imports are expected to be similar to 2012.

The development of buffalo meat exports by **India** is boosting the country's deliveries to Asian neighbours and to the Near East and North Africa. India's principal markets are Vietnam and Malaysia; however, the meat has found a ready outlet in many other countries. Overall, India's 2013 bovine meat exports may grow by as much as 15 percent to 1.6 million tonnes. At this level, sales would equal those of Brazil, and be above those of the other two principal beef exporting countries, Australia and the United States. In total, these four countries together supply 65 percent of bovine meat trade.

Higher production means that increased shipments are expected for both **Brazil** and **Australia**, by 6 percent and 4 percent, respectively. At the same time, limited domestic supplies will keep **United States**' trade at a level similar to 2012. Elsewhere, and in order of volume of trade, **New Zealand**, **Uruguay**, **Paraguay**, **Mexico** and **Argentina**, which together represent approximately a further 20 percent of trade, are all anticipated to increase sales, while shipments by the **EU**, **Canada**, **Belarus** and **Nicaragua** are forecast to remain stable or dip slightly lower.

PIGMEAT

Growth in Asia to sustain world pigmeat production

Production of pig meat is expected to grow by 1.5 percent to a record level of 114.2 million tonnes in 2013. However, the rate of growth will be slower than in the previous year, as a result of higher slaughter rates in 2012 in response to the elevated price of feed and, in some cases, abundant stocks, which depressed prices. Almost two-thirds of pig meat production originates in the developing countries, which is where most of the increase in output is forecast. Conversely, composite production by the developed countries is expected to show a small decline. Asia is the principal region, accounting for almost 60 percent of world pig meat production. Strong consumer demand and government support policies are anticipated to result in **China's** pork output reaching 53.8 million tonnes, or almost half of the world total. Recovery from FMD-depletion should boost production in the **Republic of Korea**. Elsewhere in Asia, listed by magnitude of production, output is forecast to be moderately higher in **Vietnam**, the **Philippines**, **Japan**, **Thailand** and **Indonesia** – in some instances, growth in the sector is being limited by competition from other types of meat.

In the Americas, **Brazil**, the world's fourth largest producing country, is expected to see pigmeat output increase, stimulated by improved pig prices. In **Mexico**, production continues to expand, underpinned by improved genetics and productivity, which are translating into more piglets per litter and higher animal weights.

In the **EU** – at 22.4 million tonnes, the second most important pork producer after China – compliance with animal welfare requirements relating to the housing of sows is expected to depress output for a second year, with an anticipated fall of 2 percent. In the **United States**, the third largest producing country, lower feed costs and increased slaughter, associated with an expansion of the breeding herd could lead to limited growth. In **Canada**, producers' struggles to remain profitable have resulted in a number ceasing operations –consequently a small decrease in output is anticipated. In the **Russian Federation**, where a sustained 4 percent growth is forecast, the industry is being assisted by reduced feed prices and is benefitting from government policies favouring large-scale farms

Pig meat trade stalls in the face of reduced demand in Asia and lower export availabilities

Reduced output among some of the principal exporting countries and a decrease in demand by several major importing countries are expected to result in a decline in pig meat trade during 2013. Shipments are anticipated to fall by 4 percent to 7.2 million tonnes. Pig meat imports by Asian countries, which as a group represent approximately half of world demand, are expected to fall for a second year: after being down by 4 percent in 2012, a 6 percent decrease is anticipated for 2013. Procurement by the **Republic of Korea** is forecast to register a substantial drop for the second year in a row, decreasing by around 150 000 tonnes, or 30 percent. This reflects a build-up of stocks and a fall in domestic prices stemming from a strong recovery of production following the 2011 FMD outbreak. **Japan**, the largest importer, is anticipated to cut purchases by 2.5 percent, reflecting expanding production and strong competition from poultry and imported beef. Imports by **China** are expected to be stable, following notable growth in recent years, as a consequence of a rise in production. Elsewhere, the **Russian Federation**, **Mexico**, the **United States** and **Canada** are anticipated to maintain purchases at a similar level to last year, while **Ukraine's** purchases may fall due to restrictions on imports established in favour of national producers.

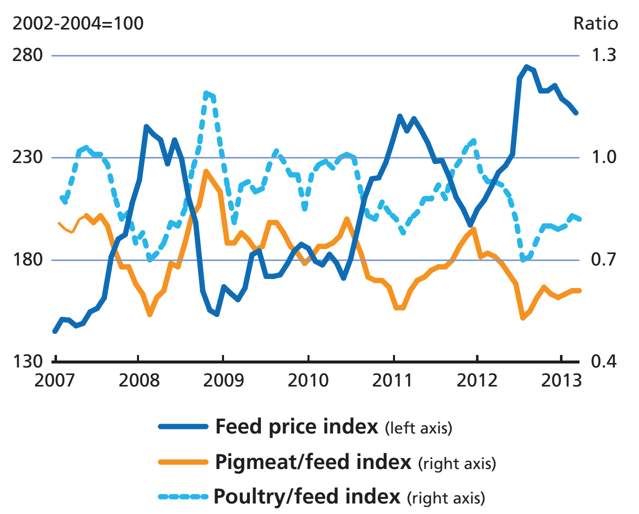
In terms of exports, reduced availability in the **United States**, the **EU** and **Canada** – which account for 75 percent of world trade – is expected to constrain sales, especially in the **EU**, where shipments are anticipated to fall by 10 percent. **Brazil**, the fourth largest exporter, is facing restrictions on pig meat trade in some markets, such as the **Ukraine**, and thus may also see a decline in sales. Moderate growth in shipments by smaller scale exporting countries will go some way to counterbalance reduced exports by the main trading countries. Sales by non-traditional exporters, such as **Chile** and **Mexico**, are expected to rise, especially in Mexico due in part to its newly recognized status as free of Classical Swine Fever. Shipments from **Belarus** are also set to increase, facilitated by a newly negotiated customs union with the Russian Federation.

POULTRY MEAT

Production growth continues despite disease outbreaks

Global poultry production is anticipated to increase 1.8 percent to 106 million tonnes in 2013. While growing, output remains constrained by the cost of feed, although this may fall further during the year. Unlike bovine and pig meat, production growth is foreseen in both developing and developed country groupings. Competitive pricing of poultry relative to other meats is an important element in its momentum. Estimating 2013 output for **China** – currently the second largest producer, but on trend to

Figure 3. Pork and poultry producers struggle with high feed costs



replace the United States as the main producing country in the next few years – remains difficult because of culling and limitations on the retail sale of live poultry following an outbreak of H7N9 influenza strain in March. Furthermore, consumer confidence in poultry meat has diminished and sales are reported to have suffered. Consequently, China's poultry output has been provisionally set as unchanged from 2012, in contrast with the 2.6 percent increase originally projected. An outbreak of the H7N3 strain in **Mexico** in April is also causing concern. In the **United States**, a 1.6 percent increase in output is anticipated as production has recovered from the 2012 slump, aided by improved prices and a reduction in feed costs. Elsewhere, production growth is anticipated for the **EU**, **Brazil** and the **Russian Federation**, which collectively account for 26 percent of world production. Continued rapid expansion is forecast for **India**, where output may rise by 8 percent. Among the top 20 producing countries, apart from the uncertainty surrounding China, only **Japan** is expected to register a fall in output, which could decline by 0.7 percent in response to oversupply and associated reduced prices stemming from a sharp increase in production in 2012 and a subsequent build-up of stocks.

Trade slows

Poultry, the most traded category of meat, represents almost 45 percent of world commerce. Although the volume of sales doubled over the past decade, growth has stalled since 2010. This slowdown is expected to continue in 2013, when trade is forecast to increase by 1.5 percent to 13.3 million tonnes. Purchases by Asia, the main importing region, are anticipated to increase by 0.6 percent, due to growth in purchases by **Saudi**

Arabia, Vietnam, Iraq, the **United Arab Emirates** and **Kazakhstan**, among others. However, abundant domestic supplies in **Japan** and the **Republic of Korea**, and concerns over avian influenza that have led to decreased consumption in **China**, are expected to curb imports. Compared to other regions, imports for Africa as a whole are forecast to show strong growth in 2013, increasing by 6 percent. Among the main importing countries, **South Africa**, **Angola**, **Benin, Ghana** and **Egypt** are all anticipated to purchase more, as income growth strengthens demand. In **Egypt**, culling associated with avian influenza, combined with FMD-induced high beef prices, will provide an additional stimulus to imports. Deliveries to the **Russian Federation** in 2013 are expected to increase moderately, in part due to the recent customs agreement with Ukraine and Belarus. Imports by the Federation remain at less than half what they were in the mid-2000s, because of a considerable increase in domestic production. Rising poultry production within the **European Union** could lead to reduced purchases in 2013, while imports by **Mexico** and **Canada** are anticipated to change little, amid stable domestic demand.

Subdued import demand and reduced margins are expected to restrain overall world poultry exports; however, a rising trend in medium-sized exporting countries' trade is discernible. The most important trading countries, **Brazil,** the **United States** and the **EU**, which together account for almost three-quarters of global trade, have had little expansion in sales in recent years. Instead, most growth has come from second-tier exporters, including **Thailand**, **China**, **Argentina**, **Turkey, Chile,** the **Ukraine** and **Belarus.** This pattern is expected to be maintained for 2013, with the exception of China. Shipments from **Thailand** to the **EU** are forecast to rise vigorously, supported by competitive pricing and **EU's** lifting of an eight-year AI-induced ban on fresh and chilled products. Likewise, exports from **Turkey,** which have benefited from a rising regional demand, especially from Iraq, are forecast to grow by over 15 percent. Government investments are supporting record **Argentine** exports, particularly to regional markets, including Venezuela and Chile.

OVINE MEAT

Production rising steadily

Production of ovine meat continues to show modest growth, following a period of stagnation, and is forecast to rise 1.2 percent, to 13.8 million tonnes, in 2013. Developing countries account for three-quarters of output, with the largest producers in this grouping being **China, India, Sudan** and **Nigeria.** Furthermore, ovine meat is an important element in the markets of many countries in North Africa and the Near East. Satisfactory pasture conditions have set the basis for flock rebuilding for many of the major producing areas of Asia and Africa. In developed countries, the main production growth is expected to come from **Australia** and **New Zealand.** Output in Australia is anticipated to register a particularly strong rise – increasing by 10 percent. In the **EU**, the long-term decline in output is expected to continue, as a result of high production costs and limited returns to producers.

Demand rising in China and the Near East

Import demand for ovine meat is expected to register a second strong year, growing by over 6 percent to 850 000 tonnes in 2013. Most of the increase is anticipated to come from **China,** but will also encompass the **EU** and a number of countries in the Near East, including **Saudi Arabia**, **Jordan** and **Qatar**. Almost 90 percent of world trade is supplied by **Australia** and **New Zealand**. Of the two countries, Australia is anticipated to record the strongest growth in sales, although those of New Zealand are also expected to grow substantially. A shift in market demand to China and the Near East is also leading to a change in the type of meat shipped, with a movement towards whole carcasses, including offal, as opposed to a preference for only the higher value cuts which characterizes the markets of the EU and the United States.

MEAT: MAJOR RICE POLICY DEVELOPMENTS: NOVEMBER 2012 - MAY 2013*

COUNTRY	PRODUCT	DATE	POLICY CATEGORY/ INSTRUMENT	DESCRIPTION
Belarus	Beef	Jan-13	Import ban	Suspended imports of Brazilian beef due to the outbreak of bovine spongiform encephalopathy (BSE) in the country.
	Poultry	Jan-13	Import ban	Imposed temporary restrictions on the import of poultry and poultry product from Bulgaria to prevent a spread of Newcastle disease.
	Pigmeat, poultry	Mar-13	Import ban lifted	Lifted the ban it had imposed in early January on the import of pork, poultry and ready meat products containing pork from Germany.
	Poultry	Apr-13	Import ban lifted	Lifted the ban on the import of poultry meat from Czech Republic.
Bilateral/Multilateral	Poultry	Feb-13	Animal health regulations	Russia-Belarus-Kazakhstan: Approved veterinary certificate for export of poultry from USA to the Customs Union.
Canada	Beef	Apr-13	State market intervention	Extended the national beef levy until 30 June 2015. The non-refundable national levy (expected to be worth more than CAD 600 000) has been authorized to continue providing industry stability through funding national marketing, promotion and research activities.
Chile	Beef	Feb-13	Import ban lifted	Ended its ban on US beef and beef products, imposed in 2003 after a US cow tested positive for bovine spongiform encephalopathy (BSE).
	Beef	Apr-13	Export ban	Suspended beef exports to the EU while it investigates supply chain weaknesses identified by a European veterinary mission.
China	Beef	Dec-12	Import ban	Suspended imports of Brazilian beef due to the outbreak of bovine spongiform encephalopathy (BSE) in the country.
Colombia	Meat	Apr-13	Export ban	Restricted meat exports to Venezuela to prevent domestic shortages and rising domestic prices.
Egypt	Beef	Dec-12	Import ban	Suspended imports of Brazilian beef due to the outbreak of bovine spongiform encephalopathy (BSE) in the country.
Indonesia	Poultry	Dec-12	Import ban	Suspended the import of poultry from Australia following notification from the World Organization for Animal Health (OIE) about infectious diseases affecting poultry in the country.
Japan	Beef	Dec-12	Import ban	Suspended imports of Brazilian beef due to the outbreak of bovine spongiform encephalopathy (BSE) in the country.
	Beef	Feb-13	Import ban lifted	Lifted its ban on imports of beef from the US, France and the Netherlands.
Jordan	Beef	Jan-13	Import ban	Suspended imports of Brazilian beef due to the outbreak of bovine spongiform encephalopathy (BSE) in the country.
Kyrgyzstan	Poultry	Apr-13	Import ban	Banned imports of poultry and poultry products from China in connection with the spread of the new H7N9 virus in China.
Malaysia	Poultry	Apr-13	Import ban	Suspended temporarily the import of chicken products from China as a precaution against the H7N9 avian influenza.
Peru	Beef	Jan-13	Import ban	Suspended imports of Brazilian beef due to the outbreak of bovine spongiform encephalopathy (BSE) in the country.
Philippines	Poultry	Nov-12	Import ban	Suspended temporarily the importation of poultry and other poultry products from Australia because of the recent outbreak of Highly Pathogenic Avian Influenza (HPAI).
	Poultry	Nov-13	Import ban lifted	Lifted the ban on poultry products imported from the Chinese Province of Taiwan after global health authorities declared it free of the bird flu virus.
Qatar	Beef	Jan-13	Import ban	Suspended imports of Brazilian beef due to the outbreak of bovine spongiform encephalopathy (BSE) in the country.
Republic of Korea	Beef	Dec-12	Import ban	Suspended imports of Brazilian beef due to the outbreak of bovine spongiform encephalopathy (BSE) in the country.

COUNTRY	PRODUCT	DATE	POLICY CATEGORY/ INSTRUMENT	DESCRIPTION
Russia	Poultry	Jan-13	Import ban	Restricted temporarily imports from the one specific poultry farm in Ukraine, and introduced enhanced laboratory control of products coming from a another company.
	Meat	Feb-13	Import ban	Banned imports of chilled pork, beef and poultry from Germany for, allegedly, excessively lax food safety controls, citing unclear origin of the meat, misrepresentation of the meat products, lack of monitoring of chemical ingredients and contamination.
	Beef, pigmeat, poultry	Feb-13	Import ban	Banned the imports of frozen pork and beef, as well as turkey meat and by-products from the US. The move was based on the presence of the banned growth promoter, ractopamine, in the products.
	Poultry	Mar-13	Import ban lifted	Approved imports of poultry from two processing plants in Brazil, in a first concrete step towards lifting a ban on meat imports from three southern Brazilian states.
	Livestock	Mar-13	State market intervention	Approved,with Resolution Nr 338, the disbursement of subsidies from the 2013 federal budget to agricultural producers and animal breeders. The subsidies amount to RUB 6,77 billion (USD 221 million).
	Beef, pigmeat	Apr-13	Import ban	Banned virtually all beef and pork from Canada, after Canadian farmers were granted permission to use Paylean and Optaflexx as dietary growth promotants.
	Beef	Apr-13	Import ban	Banned almost all imports of Mexican beef because of concerns that Mexican producers had not complied with a commitment to refrain from using the animal feed additive, ractopamine, which promotes leanness in animals raised for their meat.
Saudi Arabia	Beef	Dec-12	Import ban	Suspended imports of Brazilian beef due to the outbreak of bovine spongiform encephalopathy (BSE) in the country.
South Africa	Beef	Dec-12	Import ban	Suspended imports of Brazilian beef due to the outbreak of bovine spongiform encephalopathy (BSE) in the country.
Thailand	Beef	Feb-13	Import ban lifted	Lifted the ban on imports of beef products from the EU which was imposed in 2001 after the outbreak of bovine spongiform encephalopathy (BSE). Thailand partially relaxed the measure in 2006, but kept a ban in place on beef and beef products coming from a number of EU member states.
Ukraine	Livestock	Jan-13	State market intervention	Announced a record allocation of UAH 650 million (USD 80.4 million) from the state budget to be invested in support of the livestock sector in 2013.
	Pigmeat	Mar-13	Import ban	Banned imports of pork from Brazil, on claims that various companies from Brazil did not meet pork safety indicators required by Ukrainian law.
	Poultry	May-13	Export ban	Suspended exports of chicken meat to the Russian Federation from two producing firms while investigating a Russian allegation of contamination.
	Pigmeat, pigs	May-13	Import ban	Banned imports of pigs, pork and products made of it from Belarus, due to the possible outbreak of African swine fever (ASF) in a district of Belarus.
United Arab Emirates	Poultry	Feb-13	Import ban	Banned poultry imports from Bulgaria to prevent the entry of epidemic diseases .
Vietnam	Poultry	Apr-13	Import ban	Suspended poultry imports from China after detection of the new avian influenza strain H7N9.

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

APPENDIX TABLE 14: TOTAL **MEAT** STATISTICS[1] (*million tonnes*)

	Production		Imports		Exports		Utilization	
	2012 *estim.*	2013 *f'cast*	2012 *estim.*	2013 *f'cast*	2012 *estim.*	2013 *f'cast*	2012 *estim.*	2013 *f'cast*
ASIA	**128 342**	**131 140**	**14 589**	**14 685**	**4 791**	**5 011**	**138 140**	**140 814**
China	83 736	85 255	3 726	3 877	1 816	1 692	85 647	87 440
of which Hong Kong, SAR	201	201	1 926	2 012	840	722	1 287	1 491
India	6 593	7 072	2	2	1 365	1 567	5 230	5 507
Indonesia	3 050	3 100	51	46	5	5	3 096	3 141
Iran, Islamic Republic of	2 256	2 322	201	176	32	33	2 425	2 464
Japan	3 259	3 242	3 149	3 133	10	11	6 397	6 365
Korea, Republic of	2 136	2 369	1 039	852	35	36	3 140	3 184
Malaysia	1 698	1 706	264	269	43	46	1 919	1 929
Pakistan	2 793	2 910	4	4	49	52	2 748	2 861
Philippines	2 871	2 936	350	342	26	28	3 195	3 250
Saudi Arabia	775	782	1 037	1 059	61	65	1 751	1 776
Singapore	115	116	317	336	25	25	407	428
Thailand	2 682	2 698	91	95	850	927	1 923	1 867
Turkey	2 646	2 685	94	100	331	381	2 408	2 404
Viet Nam	4 229	4 305	1 161	1 176	20	20	5 370	5 460
AFRICA	**17 265**	**17 549**	**2 810**	**2 927**	**143**	**146**	**19 932**	**20 330**
Algeria	619	622	100	106	-	-	719	727
Angola	236	245	563	618	-	-	799	863
Egypt	1 910	1 958	442	426	4	4	2 349	2 380
Nigeria	1 454	1 469	1	1	-	-	1 456	1 470
South Africa	2 876	2 913	463	489	31	31	3 307	3 371
CENTRAL AMERICA	**8 879**	**8 954**	**2 629**	**2 707**	**545**	**582**	**10 962**	**11 079**
Cuba	300	305	267	272	-	-	567	577
Mexico	6 108	6 133	1 651	1 758	293	334	7 465	7 557
SOUTH AMERICA	**38 878**	**39 862**	**1 085**	**1 091**	**7 704**	**8 005**	**32 259**	**32 948**
Argentina	4 838	5 119	40	43	552	608	4 326	4 553
Brazil	24 083	24 518	72	70	6 222	6 407	17 933	18 181
Chile	1 485	1 526	278	281	314	330	1 449	1 477
Colombia	2 256	2 263	96	107	11	14	2 340	2 357
Uruguay	648	668	31	33	362	379	318	322
Venezuela	1 680	1 785	477	461	-	-	2 157	2 246
NORTH AMERICA	**46 829**	**46 809**	**2 407**	**2 573**	**9 373**	**9 176**	**39 863**	**40 206**
Canada	4 312	4 233	809	835	1 720	1 715	3 402	3 354
United States of America	42 516	42 575	1 584	1 723	7 653	7 461	36 447	36 837
EUROPE	**57 636**	**57 621**	**5 190**	**5 163**	**4 746**	**4 578**	**58 081**	**58 206**
Belarus	1 035	1 071	166	172	390	404	811	838
European Union	45 018	44 696	1 393	1 390	4 094	3 856	42 317	42 230
Russian Federation	7 705	7 951	2 733	2 759	28	32	10 409	10 678
Ukraine	2 049	2 059	389	328	129	175	2 308	2 212
OCEANIA	**6 021**	**6 232**	**420**	**439**	**2 583**	**2 703**	**3 858**	**3 967**
Australia	4 141	4 264	220	235	1 720	1 804	2 641	2 695
New Zealand	1 389	1 470	54	56	860	896	583	631
WORLD	**303 850**	**308 167**	**29 130**	**29 585**	**29 885**	**30 200**	**303 095**	**307 552**
Developing countries	184 137	188 220	16 966	17 219	13 129	13 689	187 974	191 750
Developed countries	119 713	119 947	12 164	12 366	16 756	16 511	115 122	115 802
LIFDCs	28 406	29 283	2 977	3 011	1 567	1 769	29 816	30 525
LDCs	10 320	10 499	1 418	1 491	6	5	11 732	11 984

[1] Including "other meat".

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

	Production		Imports		Exports		Utilization	
	2012 *estim.*	2013 *f'cast*	2012 *estim.*	2013 *f'cast*	2012 *estim.*	2013 *f'cast*	2012 *estim.*	2013 *f'cast*
ASIA	**17 175**	**17 624**	**3 571**	**3 746**	**1 697**	**1 885**	**19 000**	**19 482**
China	6 474	6 532	566	702	154	132	6 887	7 102
India	2 761	3 032	1	1	1 346	1 548	1 416	1 485
Indonesia	530	560	45	40	1	1	574	599
Iran, Islamic Republic of	250	260	152	140	2	2	401	399
Japan	519	505	739	776	2	2	1 256	1 276
Korea, Republic of	312	336	349	320	3	3	606	653
Malaysia	31	32	163	170	9	10	185	192
Pakistan	1 500	1 500	3	3	27	28	1 476	1 475
Philippines	305	310	129	125	6	8	428	427
AFRICA	**6 723**	**6 814**	**718**	**703**	**75**	**77**	**7 365**	**7 440**
Algeria	127	125	94	100	-	-	221	225
Angola	102	104	129	135	-	-	231	239
Egypt	800	816	317	285	1	1	1 116	1 100
South Africa	850	870	9	8	11	10	848	868
CENTRAL AMERICA	**2 549**	**2 543**	**371**	**407**	**381**	**402**	**2 539**	**2 548**
Mexico	1 820	1 800	231	277	182	205	1 869	1 872
SOUTH AMERICA	**15 025**	**15 411**	**493**	**494**	**2 219**	**2 367**	**13 298**	**13 538**
Argentina	2 500	2 675	2	2	185	200	2 317	2 477
Brazil	9 307	9 500	62	60	1 458	1 550	7 911	8 010
Chile	198	195	173	176	7	7	364	364
Colombia	945	930	2	2	10	12	937	920
Uruguay	488	500	-	-	325	340	163	160
Venezuela	496	498	235	235	-	-	731	733
NORTH AMERICA	**12 925**	**12 500**	**1 266**	**1 424**	**1 505**	**1 479**	**12 653**	**12 486**
Canada	1 057	1 000	301	315	317	312	1 012	1 018
United States of America	11 868	11 500	961	1 105	1 188	1 167	11 637	11 464
EUROPE	**10 367**	**10 340**	**1 426**	**1 430**	**574**	**547**	**11 218**	**11 223**
European Union	7 641	7 603	305	315	377	347	7 569	7 571
Russian Federation	1 649	1 665	996	990	8	9	2 636	2 646
Ukraine	365	360	7	7	18	20	353	347
OCEANIA	**2 801**	**2 908**	**58**	**55**	**1 765**	**1 841**	**1 082**	**1 107**
Australia	2 131	2 188	12	10	1 290	1 343	842	840
New Zealand	650	700	10	10	472	495	188	215
WORLD	**67 564**	**68 140**	**7 903**	**8 259**	**8 216**	**8 598**	**67 155**	**67 824**
Developing countries	38 357	39 260	4 269	4 420	4 358	4 717	38 219	38 962
Developed countries	29 206	28 881	3 634	3 839	3 859	3 881	28 936	28 862
LIFDCs	10 604	11 005	698	666	1 510	1 712	9 792	9 958
LDCs	4 184	4 240	189	196	4	3	4 369	4 434

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

	Production		Imports		Exports		Utilization	
	2012 *estim.*	**2013** *f'cast*	**2012** *estim.*	**2013** *f'cast*	**2012** *estim.*	**2013** *f'cast*	**2012** *estim.*	**2013** *f'cast*
ASIA	**7 827**	**7 884**	**442**	**487**	**47**	**48**	**8 222**	**8 323**
Bangladesh	205	210	-	-	-	-	205	210
China	3 932	3 932	159	185	6	5	4 085	4 113
India	910	920	-	-	12	13	898	908
Iran, Islamic Republic of	240	245	11	12	-	-	251	257
Pakistan	450	455	-	-	18	20	432	435
Saudi Arabia	88	89	55	58	5	5	138	142
Turkey	300	310	1	1	-	-	301	311
AFRICA	**2 906**	**2 942**	**31**	**31**	**27**	**28**	**2 910**	**2 944**
Algeria	195	195	3	4	-	-	198	199
Nigeria	470	475	-	-	-	-	470	475
South Africa	163	160	5	5	-	-	168	165
Sudan	482	484	-	-	-	-	482	484
CENTRAL AMERICA	**132**	**134**	**18**	**17**	**-**	**-**	**150**	**150**
Mexico	102	104	8	7	-	-	110	111
SOUTH AMERICA	**324**	**325**	**6**	**7**	**22**	**23**	**308**	**309**
Brazil	115	117	6	7	-	-	121	123
NORTH AMERICA	**87**	**89**	**95**	**93**	**6**	**5**	**176**	**177**
United States of America	72	73	79	77	6	5	144	145
EUROPE	**1 287**	**1 276**	**174**	**181**	**29**	**31**	**1 432**	**1 426**
European Union	972	956	154	160	22	24	1 104	1 092
Russian Federation	195	200	10	10	-	-	205	210
OCEANIA	**1 035**	**1 105**	**31**	**34**	**692**	**735**	**375**	**404**
Australia	565	622	1	1	342	375	224	248
New Zealand	470	483	2	2	350	360	122	125
WORLD	**13 599**	**13 755**	**798**	**849**	**823**	**871**	**13 573**	**13 733**
Developing countries	10 415	10 502	500	548	96	99	10 819	10 951
Developed countries	3 184	3 253	297	301	727	772	2 754	2 782
LIFDCs	4 075	4 145	39	42	14	15	4 100	4 173
LDCs	1 859	1 899	5	5	-	-	1 864	1 905

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

	Production		Imports		Exports		Utilization	
	2012 *estim.*	**2013** *f'cast*	**2012** *estim.*	**2013** *f'cast*	**2012** *estim.*	**2013** *f'cast*	**2012** *estim.*	**2013** *f'cast*
ASIA	**63 944**	**65 717**	**3 429**	**3 239**	**451**	**472**	**66 882**	**68 473**
China	53 361	54 806	1 252	1 233	377	392	54 236	55 648
of which Hong Kong, SAR	140	140	524	500	122	120	541	520
India	329	329	1	1	-	-	330	330
Indonesia	730	737	1	1	-	-	731	737
Japan	1 297	1 305	1 283	1 251	1	1	2 580	2 555
Korea, D.P.R.	115	120	2	2	-	-	117	122
Korea, Republic of	1 086	1 280	508	356	2	1	1 551	1 625
Malaysia	230	230	13	10	7	8	236	232
Philippines	1 655	1 700	101	101	6	6	1 750	1 795
Thailand	870	875	3	3	28	35	844	843
Viet Nam	3 160	3 200	37	35	20	20	3 177	3 215
AFRICA	**1 300**	**1 320**	**268**	**295**	**8**	**8**	**1 560**	**1 606**
Madagascar	56	56	-	-	-	-	56	56
Nigeria	243	245	-	-	-	-	243	245
South Africa	320	320	43	45	4	4	360	361
Uganda	120	123	-	-	-	-	120	123
CENTRAL AMERICA	**1 758**	**1 795**	**801**	**826**	**121**	**135**	**2 438**	**2 487**
Cuba	180	182	42	45	-	-	222	227
Mexico	1 227	1 255	614	645	100	116	1 741	1 784
SOUTH AMERICA	**5 218**	**5 334**	**172**	**189**	**888**	**921**	**4 502**	**4 603**
Argentina	331	350	32	35	1	1	361	384
Brazil	3 330	3 370	1	2	711	733	2 620	2 639
Chile	584	620	25	30	174	185	435	465
Colombia	185	187	36	46	-	-	221	233
Venezuela	175	178	29	25	-	-	204	203
NORTH AMERICA	**12 538**	**12 616**	**703**	**706**	**3 540**	**3 380**	**9 663**	**9 931**
Canada	1 980	1 952	264	268	1 206	1 200	1 039	1 020
United States of America	10 558	10 664	434	433	2 334	2 180	8 620	8 906
EUROPE	**27 256**	**26 901**	**1 664**	**1 613**	**2 479**	**2 260**	**26 440**	**26 254**
Belarus	427	443	135	139	145	154	417	428
European Union	22 813	22 357	20	20	2 266	2 040	20 567	20 337
Russian Federation	2 518	2 608	1 088	1 098	2	2	3 604	3 704
Serbia	290	290	19	15	10	10	299	295
Ukraine	600	590	263	200	29	25	833	765
OCEANIA	**493**	**482**	**254**	**272**	**35**	**34**	**713**	**721**
Australia	352	340	195	211	34	33	514	518
Papua New Guinea	67	67	6	6	-	-	73	73
WORLD	**112 506**	**114 165**	**7 290**	**7 141**	**7 522**	**7 211**	**112 198**	**114 074**
Developing countries	70 394	72 329	3 302	3 206	1 463	1 532	72 192	73 994
Developed countries	42 112	41 836	3 989	3 935	6 058	5 679	40 006	40 080
LIFDCs	4 045	4 119	245	251	10	10	4 280	4 360
LDCs	1 432	1 466	187	208	-	-	1 619	1 674

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

	Production		Imports		Exports		Utilization	
	2012 *estim.*	2013 *f'cast*	2012 *estim.*	2013 *f'cast*	2012 *estim.*	2013 *f'cast*	2012 *estim.*	2013 *f'cast*
ASIA	**37 474**	**37 978**	**7 093**	**7 137**	**2 571**	**2 580**	**41 994**	**42 535**
China	18 510	18 517	1 743	1 751	1 263	1 148	18 990	19 121
of which Hong Kong, SAR	47	47	1 073	1 075	649	550	470	572
India	2 447	2 643	-	-	6	5	2 441	2 638
Indonesia	1 671	1 681	-	-	-	-	1 671	1 681
Iran, Islamic Republic of	1 750	1 800	37	-	29	30	1 758	1 770
Japan	1 430	1 420	1 093	1 073	7	8	2 516	2 485
Korea, Republic of	727	742	169	162	30	32	866	872
Kuwait	39	39	133	120	1	1	172	159
Malaysia	1 435	1 442	68	67	27	28	1 476	1 481
Saudi Arabia	590	595	810	818	30	32	1 370	1 381
Singapore	96	96	146	155	11	11	231	240
Thailand	1 550	1 560	2	2	770	840	782	721
Turkey	1 700	1 712	84	90	311	360	1 473	1 442
Yemen	155	160	105	105	-	-	260	265
AFRICA	**4 926**	**5 034**	**1 762**	**1 866**	**24**	**25**	**6 664**	**6 876**
Angola	23	24	301	330	-	-	324	354
South Africa	1 520	1 540	405	431	10	11	1 914	1 960
CENTRAL AMERICA	**4 321**	**4 362**	**1 420**	**1 440**	**41**	**43**	**5 700**	**5 758**
Cuba	36	37	210	215	-	-	246	252
Mexico	2 857	2 872	784	815	10	12	3 631	3 675
SOUTH AMERICA	**18 004**	**18 481**	**412**	**400**	**4 508**	**4 627**	**13 908**	**14 254**
Argentina	1 825	1 910	6	6	331	371	1 500	1 545
Brazil	11 300	11 500	2	2	4 029	4 100	7 273	7 402
Chile	675	685	79	75	125	130	629	630
Venezuela	1 000	1 100	213	200	-	-	1 213	1 300
NORTH AMERICA	**21 031**	**21 354**	**332**	**338**	**4 284**	**4 273**	**17 013**	**17 428**
Canada	1 237	1 243	225	233	177	183	1 284	1 293
United States of America	19 794	20 111	102	100	4 107	4 090	15 723	16 130
EUROPE	**17 531**	**17 908**	**1 761**	**1 773**	**1 579**	**1 654**	**17 713**	**18 027**
European Union	12 550	12 738	814	795	1 347	1 363	12 017	12 170
Russian Federation	3 252	3 388	593	615	17	20	3 828	3 983
Ukraine	1 035	1 060	118	120	81	130	1 072	1 050
OCEANIA	**1 272**	**1 308**	**72**	**73**	**50**	**52**	**1 296**	**1 328**
Australia	1 071	1 092	11	12	40	40	1 044	1 064
New Zealand	175	190	1	1	10	12	166	179
WORLD	**104 560**	**106 425**	**12 852**	**13 026**	**13 059**	**13 254**	**104 288**	**106 205**
Developing countries	60 992	62 094	8 803	8 932	7 117	7 245	62 677	63 779
Developed countries	43 568	44 331	4 048	4 095	5 942	6 009	41 611	42 426
LIFDCs	7 970	8 264	1 961	2 018	27	25	9 904	10 257
LDCs	2 215	2 246	1 010	1 055	1	1	3 224	3 300

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

	Bovine meat prices (USD per tonne)			Ovine meat price (USD per tonne)	Pig meat prices (USD per tonne)		
Period	**Australia**	**United States**	**Brazil**	**New Zealand**	**United States**	**Brazil**	**Germany**
Annual (Jan/Dec)							
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
2012	4 142	4 913	4 492	6 091	2 676	2 784	2 233
Monthly							
2012 – March	4 269	5 003	4 544	6 451	2 790	2 755	2 177
2012 – April	4 236	5 095	4 611	6 443	2 704	2 848	2 250
2012 – May	4 109	5 059	4 536	6 193	2 569	2 790	2 162
2012 – June	4 045	4 781	4 422	5 913	2 608	2 663	2 118
2012- July	3 988	4 660	4 313	5 927	2 650	2 618	2 029
2012 – August	4 041	4 650	4 418	5 816	2 655	2 657	2 253
2012 – September	3 974	4 748	4 365	5 882	2 640	2 772	2 512
2012 – October	4 010	4 722	4 512	5 866	2 719	2 929	2 507
2012 – November	4 247	4 947	4 495	5 827	2 636	2 901	2 372
2012 – December	4 316	5 326	4 436	5 893	2 705	2 854	2 280
2013 – January	4 307	5 171	4 382	5 751	2 753	2 852	2 253
2013 – February	4 280	5 562	4 365	5 490	2 710	2 898	2 283
2013 - March	4 227	5 271	4 430	5 354	2 781	2 955	2 221

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