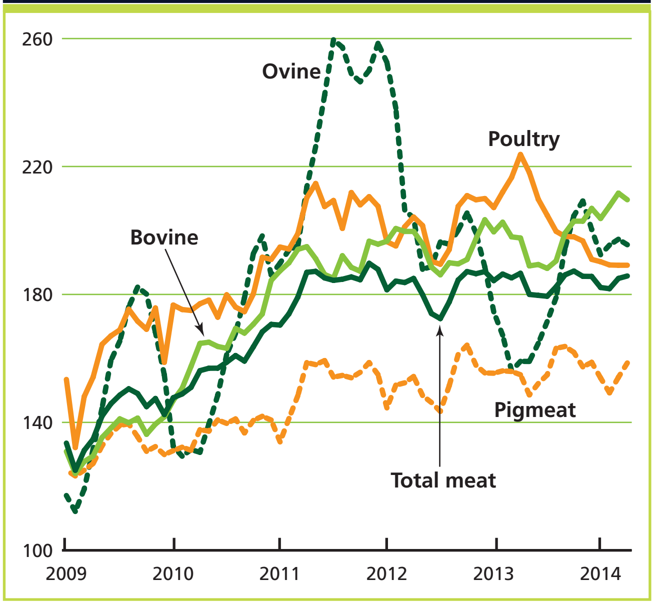
MEAT AND MEAT PRODUCTS

World meat production is anticipated to grow modestly in 2014 to 311.8 million tonnes, an increase of 3.3 million tonnes or 1.1 percent compared with 2013. Growth is anticipated to be concentrated in the developing countries, which are also the main centres of rising demand.

At the international level, prices have remained high by historical standards for the past three years. The FAO Meat Price Index averaged 186 in April 2014, unchanged when compared with a year earlier. Falling feed prices have facilitated some price decrease for poultry and pigmeat, while prices of bovine and ovine meat have remained firm, reflecting limited export availability.

Global meat trade is forecast to increase moderately, by 1.4 percent to 31.3 million tonnes. At this level, growth would be less than the average for recent years, reflecting production constraints in some of the principal exporting countries. There are marked differences in projected trade for the different varieties of meat, with growth forecast for bovine and poultry meat and a decline for ovine and pigmeat. Poultry remains the main product traded, representing 43 percent of the total, followed by bovine, pig and ovine meat, respectively.

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



WORLD MEAT MARKET AT A GLANCE

	2012	2013 *estim.*	2014 *f'cast*	Change: 2014 over 2013
	million tonnes			%
WORLD BALANCE				
Production	**304.2**	**308.5**	**311.8**	**1.1**
Bovine meat	67.0	67.7	68.0	0.5
Poultry meat	105.4	107.0	108.7	1.6
Pigmeat	112.4	114.3	115.5	1.1
Ovine meat	13.7	13.9	14.0	0.5
Trade	**29.7**	**30.9**	**31.3**	**1.4**
Bovine meat	8.0	9.1	9.4	3.5
Poultry meat	13.0	13.2	13.5	2.4
Pigmeat	7.5	7.4	7.2	-2.1
Ovine meat	0.8	1.0	1.0	-3.7
SUPPLY AND DEMAND INDICATORS				
Per caput food consumption:				
World (kg/yr)	42.9	42.9	42.9	-0.1
Developed (kg/yr)	76.2	75.9	76.1	0.3
Developing (kg/yr)	33.5	33.7	33.7	0.0

FAO MEAT PRICE INDEX (2002-2004=100)	**2012**	**2013**	**2014** *Jan-Apr*	**Change: Jan-Apr 2014 over Jan-Apr 2013 %**
	182	184	184	-1.0

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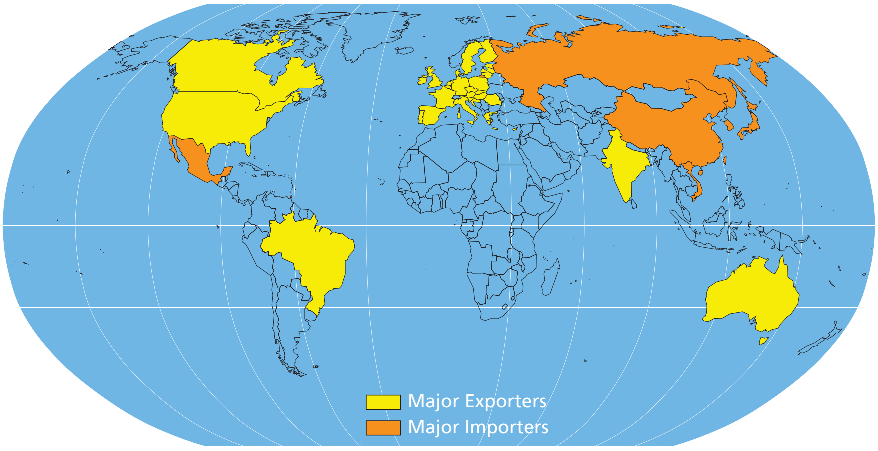
MEAT AND MEAT PRODUCTS

Major Meat Exporters and Importers



Moderate production growth; trade mixed

World meat production is anticipated to grow modestly in 2014 to 311.8 million tonnes, an increase of 3.3 million tonnes, or 1.1 percent, compared with 2013. Growth is anticipated to be concentrated in the developing countries, which are also the main centres of rising demand.

At the international level, prices have remained high by historical standards for the past three years. The **FAO Meat Price Index** averaged 186 in April 2014, unchanged when compared with a year earlier. Falling feed prices have facilitated some price decrease for poultry and pigmeat, while prices of bovine and ovine meat have remained firm – reflecting limited export availability.

Global meat trade is forecast to increase moderately, by 1.4 percent to reach 31.3 million tonnes in 2014 – or 10 percent of production. At this level, growth would be less than the average for recent years, reflecting production constraints in some of the principal exporting countries. There are marked differences in projected trade for the different varieties of meat, with growth forecast for bovine and poultry meat and a decline for ovine and pigmeat. Poultry remains the main product traded, representing 43 percent of the total, followed by bovine, pig and ovine meat, respectively.

BOVINE MEAT

Production: little changed

Bovine meat production is forecast to remain largely unchanged at around the 68 million tonne mark, a mere 0.5 percent more than in 2013, continuing a trend of limited growth which has been evident for several years.

The small increase in world production is being led by the developing countries, which collectively account for almost 60 percent of the total. As a group, they are forecast to record a 2.3 percent growth, concentrated principally in Latin America and the Caribbean and in Asia. The developed countries are predicted to experience an output decline of 1.9 percent, mainly due to a fall in North America and, to a lesser extent, Oceania.

Figure 1. Projected changes in global meat trade in 2014

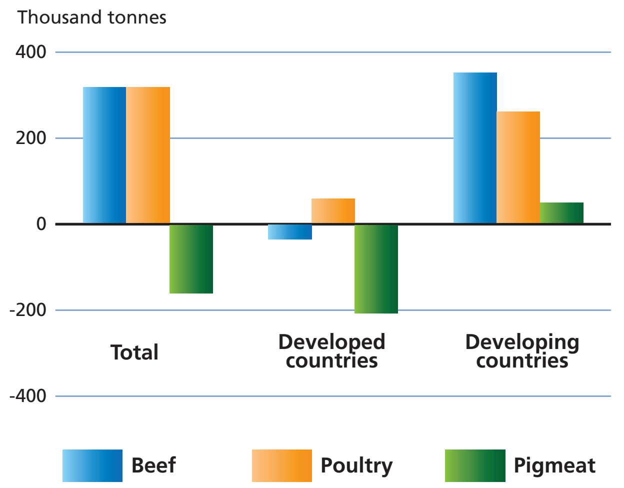


Table 1. World meat market at a glance

	2012	2013 estim.	2014 f'cast	Change: 2014 over 2013
		million tonnes		%
WORLD BALANCE				
Production	**304.2**	**308.5**	**311.8**	**1.1**
Bovine meat	67.0	67.7	68.0	0.5
Poultry meat	105.4	107.0	108.7	1.6
Pigmeat	112.4	114.3	115.5	1.1
Ovine meat	13.7	13.9	14.0	0.5
Trade	**29.7**	**30.9**	**31.3**	**1.4**
Bovine meat	8.0	9.1	9.4	3.5
Poultry meat	13.0	13.2	13.5	2.4
Pigmeat	7.5	7.4	7.2	-2.1
Ovine meat	0.8	1.0	1.0	-3.7
SUPPLY AND DEMAND INDICATORS				
Per caput food consumption:				
World (kg/yr)	42.9	42.9	42.9	-0.1
Developed (kg/yr)	76.2	75.9	76.1	0.3
Developing (kg/yr)	33.5	33.7	33.7	0.0

FAO MEAT PRICE INDEX (2002-2004=100)	2012	2013	2014 Jan-Apr	Change: Jan-Apr 2014 over Jan-Apr 2013 %
	182	184	184	-1.0

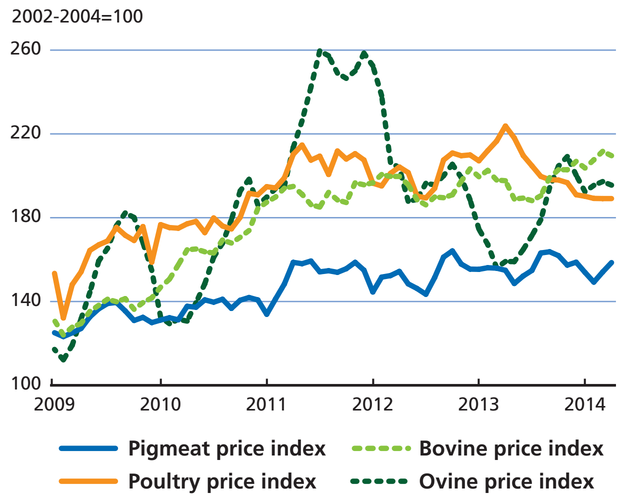
In *South America*, cattle availabilities and slaughter have been rising, particularly in **Brazil** and **Argentina**. **Brazil**, the second largest producer after the United States, is anticipated to account for most of the region's growth, with production projected to rise by 300 000 tonnes to 9.9 million tonnes. The Brazilian cattle herd is in an expansion phase supported by improvements in productivity and genetics. Additionally, favourable prices on the export market have stimulated the use of feed to maintain cattle weight during the dry season. In **Argentina**, government export restrictions have increasingly focused the industry on internal demand, which absorbs 93 percent of production. Preference for younger, lighter animals for the domestic market means that production is growing at a relatively slow rate. In neighbouring **Paraguay** and **Uruguay**, strong growth is anticipated, spurred by international demand and sustained cattle prices, and supported by herd growth and productivity increases.

In *Asia*, **India**, the fifth largest bovine meat producer, is expected to continue to expand its industry, supported by government programmes to utilise buffalo bulls from the country's expanding dairy sector. Output is forecast to drop in the **Republic of Korea**, where low profitability, in part due to competition from lower-priced pork, has led to herd reduction. In **China**, production is anticipated to show moderate growth to 6.8 million tonnes, as increased consumer demand has stimulated the slaughter of dairy cattle by small-producers who are unable to comply with newly introduced milk quality standards.

Most parts of *Africa* have received reasonable rainfall during the current season, which has improved pasture conditions and led to a moderate increase in bovine meat production. However, due to delay in the onset of seasonal rains in several East African countries, pasture and fodder and feed supplies suffered. As a consequence, production growth in some countries, including **Kenya** and **Tanzania** may be constrained. Furthermore, outbreaks of foot-and-mouth disease in east-central Kenya will have a negative impact on production. A mass vaccination programme has been initiated and the movement of livestock curtailed in the affected areas. **Egypt** is expected to show continued limited growth in production – based on dairy cattle (including buffaloes). Meanwhile, output in **South Africa** may be little changed, as dry conditions in some parts of the country could negatively affect pastures, as well as feed and forage availability.

Overall, production in *developed countries* is forecast to drop by 1.9 percent, to 28.5 million tonnes. In the **United States**, the world's largest beef producer, prolonged and extensive dry conditions have caused a fall-off in the production of calves and consequent herd reduction. Therefore, beef output could decline by almost 4.5 percent, to 11 million tonnes, its lowest level since 1994. Neighbouring **Canada** is expected to see only a small increase in production, as herd rebuilding takes priority. In *Oceania*, drought has affected the industry. In **Australia**, slaughter rates increased in 2013/2014,

Figure 2. Limited supplies and strong demand sustain meat prices



as availability of pasture and fodder were reduced. In 2013/14, output is expect to fall by 4 percent, as drought conditions have persisted in some parts of the country. In **New Zealand**, the effects of drought were limited to the first part of 2013, but still resulted in an increased slaughter rate and an associated rise in production for the 2012/13 season. Output is expected to contract in 2013/14, as the sector recovers and herds are rebuilt. The beef industry in New Zealand is highly dependent on the dairy sector for slaughter cattle and male calves for fattening. In the **Russian Federation**, continued herd reduction is expected to counterbalance some improvement in productivity, and output is anticipated to be little changed at 1.6 million tonnes. In the **EU**, the world's third largest beef producer at 7.4 million tonnes, the long-term reduction in the cattle herd is slowing which is expected to result in a small rise in production, with dairy cattle set to increase, while beef cattle may decline slightly.

Trade: China's imports expected to grow; Brazil retains premier export position

World trade in bovine meat is anticipated to grow by 3.5 percent, to 9.4 million tonnes, despite international prices being at exceptionally high levels. Consumer demand and a shortage of domestic supplies in some countries are important contributors to the expansion in trade.

China, in particular, is expected to record a strong rise in imports, although not to the same degree as in 2013, when the doubled. China could buy 1.2 million tonnes in 2014, 18 percent more than last year, confirming the country as the main world market for bovine meat. In China, demand continues to be stimulated by rising incomes and growth in meals outside the home. Additionally, some consumers have switched from poultry to other meats following an outbreak of avian influenza last year. Elsewhere in *Asia*, imports by **Japan,** the **Republic of Korea** and **Malaysia** could increase, as domestic production is forecast to be either stable or, in the case of Japan and the Republic of Korea, lower. Purchases by the **EU** may also rise, as a result of a focus on herd rebuilding. Imports by the second major market, the **United States,** are expected to increase by 3.3 percent, to compensate for reduced domestic production; while those of third-placed **Russian Federation** are forecast to change little, as exceptionally high international prices limit demand. A number of other important importers, such as Vietnam, Egypt, Canada and Venezuela may see purchases fall or stagnate in response to high prices and limited supplies.

Much of the expansion in bovine meat trade is expected to be met by growing exports from both **Brazil** and **India,** by 8 percent and 6 percent, respectively, in response to strong demand and elevated prices. The same factors may boost exports by **Argentina**, **Paraguay** and **Uruguay.** On the other hand, the effects of drought and herd rebuilding are anticipated to lead to a fall in exports by **Australia** and **New Zealand**, which together account for 20 percent of world trade. Elsewhere, little change is forecast for shipments by **Canada**, the **EU, Mexico** and the **United States**.

PIGMEAT

Growth in Asia to sustain production

Continuing several years of expansion, production of pigmeat is expected to grow by 1.1 percent to a record level of 115.5 million tonnes in 2014, assisted by lower feed costs. Most of the increase is forecast to come from developing countries, where over 60 percent of production originates, but output is also expected to expand in the developed countries. *Asia* is the leading pigmeat producing region, accounting for more than half of the total. Strong consumer demand and government support policies are anticipated to boost **China**'s output by 1.6 percent to 55.7 million tonnes, representing 48 percent of world output. Elsewhere in Asia, slight to moderate growth is forecast in **Vietnam**, the **Philippines**, **Japan**, **Thailand** and **Indonesia**. In the **Republic of Korea**, reduced output is anticipated as a result of a smaller breeding herd and the introduction of a new grading system that provides incentives for lowering slaughter weights.

In the *Americas*, **Brazil**, the world's fourth largest producer, is set to increase output to a record 3.6 million tonnes, stimulated by improved prices and reduced feed costs. Steady growth is also anticipated for **Mexico**, with output underpinned by improved genetics and productivity, which are translating into more piglets per litter and higher animal weights.

Production in the **EU,** the second most important producer after China, at 22.8 million tonnes, is expected to grow only slightly due to limitations imposed by compliance with animal welfare regulations relating to the housing of sows. In the **United States**, which ranks third in world output, the spread of porcine epidemic diarrhoea (PED), which causes increased piglet mortality, is projected to bring about a 1.9 percent fall in output. **Canada's** production is forecast to increase only slightly due to some smaller producers ceasing operations. In the **Russian Federation**, reduced feed prices and government policies favouring large-scale farms are expected to prompt a 2.9 percent expansion, building on more than a decade of growth. Investment in new farms and improved profitability should also boost production in the **Ukraine**.

Animal diseases and trade prohibitions take centre stage

Trade in pigmeat is expected to record a second consecutive annual fall in 2014, declining by 2.1 percent, as some of the principal exporting countries face supply constraints. Considering the major exporters, three suppliers, the United States, the EU and Canada, account for almost 80 percent of trade. Adding Brazil and China to the group raises the share to more than 90 percent. Sales by the **United States** are projected to fall by 2.8 percent, or 61 000 tonnes, partly as a result of PED limiting production. The **EU** is facing a major upheaval, as the Russian Federation, its main market, banned imports of EU pigmeat at the end of January, consequent on four cases of African Swine Fever (ASF) occurring in Lithuania and Poland. The prohibition remains in place up until the time of writing, although, in April, the EU challenged the ban and filed a complaint with the WTO. February imports of pigmeat by the Russian Federation from the EU were down almost 50 percent, compared with the same month in 2013. Third-ranked **Canada**, which in recent years has maintained a share of around 15 percent of trade, will not be able to substantially benefit from the additional market opportunities that the above situation has created, as its production is not anticipated to grow markedly. Conversely, following production gains, both **Brazil** and **China** are well-placed to increase exports, as are some of the smaller-scale exporters, including **Belarus** and **Mexico**.

Imports by *Asian* countries, representing almost half of total trade, may fall by 3.3 percent. **China,** the leading importer, may cut its purchases by as much as 7.5 percent, to 1.3 million tonnes. Imports by **Japan**, which are only slightly less than China's, are projected to remain close to last year, as production is anticipated to be sufficient to meet a stagnating demand. Procurement by the **Republic of Korea** is also forecast to be little changed. In *Europe*, the **Russian Federation** is anticipated to reduce pigmeat imports further in 2014, after having already cut them heavily last year. This is a reflection of growing production, weaker domestic prices and animal health/drug-residue (in particular ractopamine) import prohibitions. Imports by **Canada** and **Mexico** may also fall, hindered by the reduced supplies in the United States, their principal source of supply.

POULTRY MEAT

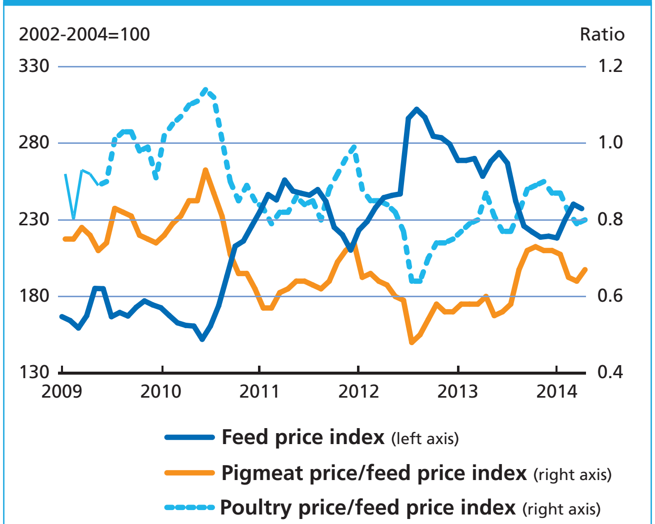
Production increases

After limited growth in 2013, global poultry production is anticipated to rise by 1.6 percent to 108.7 million tonnes in 2014. Expansion is expected to be strongest among the developed countries overall, as industry challenges in China continue to weigh on developing countries' output. Output in the **United States**, the principal producer, is anticipated to rise by 1.8 percent, to a record of 20.6 million tonnes. Elsewhere, many other major producers may witness gains, including the **EU**, **Brazil** and **Mexico.** Particularly rapid expansion rates are foreseen for the **Russian Federation**, at 8 percent, and for **India**, at 6 percent. In **China,** currently the second largest producer, the industry continues to suffer from the after-effects of 2013 outbreaks of H7N9 avian influenza; consequently, a production decrease of 1.7 percent is projected for 2014.

Trade recovers

Poultry, the most traded meat category, represents almost 45 percent of the total meat flows. While the volume trade in poultry meat has doubled over the past decade, growth slowed in 2012 and 2013. An increase of 2.4 percent is anticipated for 2014, based on rising production among exporting countries and poultry's price competitiveness compared to other meats on the international market. In *Africa*, imports as a whole are forecast to rise by 4.8 percent. Among the main importing countries, **Angola**, **Ghana** and **Benin** are anticipated to purchase more, as income growth strengthens demand, while imports by **South Africa**, the major trade destination in the region, are forecast to remain unchanged. Imports in *Asia* should register a modest increase, overall. Purchases by the two major buyers in the region, **China** and **Japan**, are projected to stagnate, due to limited growth in domestic demand and adequate domestic supplies, while those by **Saudi Arabia, Iraq** and the **United Arab Emirates** may rise vigorously,

Figure 3. Reduced feed prices provide some benefit to producers



with a concomitant increase in trade in halal-certified meat. In *Europe*, deliveries to the **Russian Federation** are expected to fall by 2 percent, to a level that is less than half of what they were in the mid-2000s, as the country has managed to raise domestic production considerably. Likewise, rising poultry production in the **EU** is forecast to forestall growth in import demand. In the *Americas*, **Mexico** is anticipated to import more, sustained by steadily increasing demand. The four leading exporters, **Brazil,** the **United States**, the **EU** and **China,** which together account for almost three-quarters of global trade, have seen little expansion in sales in recent years.

Instead, most of the growth has come from second-tier exporters, including **Thailand, Turkey**, **Argentina**, the **Ukraine** and **Belarus.** Within this grouping, the first three countries are projected to continue recording strong growth in 2014. Interestingly, each has focused on a different region or market segment: **Thailand** supplies mainly Japan and the EU with boneless poultry cuts, including prepared dishes; **Turkey** has focussed on the export of halal-certified whole birds to the Middle East, in particular Iraq, where it enjoys a logistical advantage; **Argentina** has made inroads in the Venezuelan market and, more recently, widened its focus to include China and South Africa, among others.

OVINE MEAT

Production growth slows

Production of ovine meat is expected to be constrained by falling output in *Oceania*, while showing a moderate increase elsewhere. Consequently, output for 2014 may rise by only 0.5 percent, to 14 million tonnes. Developing countries account for three-quarters of world's output, with the largest producers being **China**, **India**, **Sudan, Nigeria** and **Pakistan**. Generally satisfactory pasture conditions have set the basis for flock rebuilding in many of the major producing areas of Asia and Africa. In developed countries, drought-imposed herd reduction in **Australia** and **New Zealand** is forecast to lead to a sharp fall in production in 2014. In the **EU**, the second largest producer, the long-term decline in output may be showing signs of slowing.

Trade to fall, following a surge in 2013

Trade in ovine meat, where **Australia** and **New Zealand** account for almost 85 percent of exports, is set to fall as a result of restocking in New Zealand, following exceptionally high, drought-induced slaughter in 2013, and protracted dry-to-drought conditions in 2013/2014 in **Australia**. Overall, trade may drop by 3.7 percent to 951 000 tonnes. In dealing with reduced availabilities, it is possible that Oceania exporters will maintain provision to the highest value markets, such as the **EU** and the **United States**, while seeking, to the extent possible, to meet the requirements of growing markets, albeit lower priced ones, including **China,** the **United Arab Emirates**, **Qatar** and **Malaysia**. Among the small-scale exporters, **India** is expected to see sales grow this year, mainly to the Middle East, especially the **United Arab Emirates** and **Saudi Arabia**; and **Uruguay** could also boost its exports, focussing on **China** and **Brazil**.

MEAT: MAJOR POLICY DEVELOPMENTS: NOVEMBER 2013 - MID APRIL 2014*

COUNTRY	PRODUCT	DATE	POLICY CATEGORY/INSTRUMENT	DESCRIPTION
Australia	All	Apr-14	Free trade agreement	Concluded negotiations for a Free Trade Agreement (FTA) with the Republic of Korea, Australia's third-largest goods export market and fourth-largest trading partner. As part of the FTA, tariffs of up to 300% will be eliminated on key Australian agricultural exports such as beef, wheat, sugar, dairy, wine, horticulture and seafood, as well as resources, energy and manufactured goods.
Belarus	Pigmeat	Nov-13	Tariff rate quota	Reduced TRQ for fresh, chilled and frozen pork and pork trimmings (from 47 200 tonnes in 2013 to 20 000 tonnes in 2014). This also will allow Belarus to increase its TRQ for pork by 40 000 tonnes in 2014, if it exhausts at least 70% of the reduced 2014 TRQ for pork in the first half of 2014.
	Pigmeat	Mar-14	Import ban	Imposed temporary ban on the importation of live pigs and pigmeat from Ukraine, due to African Swine Fever (ASF) concerns.
Canada	Poultry	Feb-14	Animal welfare regulation	Announced an investment of C$4 million (USD 3.6 million) in the Canadian Poultry Research Council (CPRC), to help the poultry processing industry remain competitive while addressing consumer concerns about poultry welfare and environmental impacts.
	Pigmeat	Mar-14	Animal welfare regulation	Announced mandatory national pig traceability system, effective 1 July 2014.
China (Mainland)	All	Dec-13	Market regulation	Approved Chongqing, a municipality directly under the Central Government, to be China's first inland meat entry port. This means that imported meat can be shipped direct to Chongqing and does not have to undergo customs clearance at the port of entry. This is anticipated to reduce transportation costs and increase the price competitiveness of imported meat.
	Poultry	Mar-14	Import access	Approved import of poultry meat from an additional five Brazilian plants, bringing the total number of authorized plants to 29.
Ecuador	Beef	Apr-14	Import access	Opened import permit requests for US beef.
European Union	All	Dec-13	Market regulation	Agreed to maintain support for EU beef production through maintaining the budget for coupled payments for beef. Approved regulations on country of origin labelling for pork, lamb, goat meat and poultry.
Hong Kong	Poultry	Feb-14	Import ban	Extended ban on imports of live poultry from mainland China – consequent on H7N9 virus.
	Poultry	Feb-14	Import ban	Resumed sales of live local chicken on February 19 after it had been suspended for 21 days due to detection of H7N9 flu virus in live chicken samples drawn from a shipment of imports from China in late January.
	Poultry	Mar-14	Import ban	Implemented several measures to prevent the spread of the H7N9 virus. Closed its broiler wholesale market and culled over 20 000 birds; suspended live chicken imports from Mainland China for four months, effective February 18, 2014, to protect its domestic live bird markets.
India	All	Mar-14	Market regulation	Approved an allocation of USD 44.75 million to the National Livestock Mission, which supports livestock development.
Iraq	Poultry	Nov-13	Import ban lifted	Lifted the ban on imports of poultry from Arkansas which had been imposed following a reported case of pathogenic avian flu in the State.
Japan	Beef	Dec-13	Import ban lifted	Lifted the import ban on Irish beef. Japan banned imports of beef from the EU in 2000, following a BSE outbreak. Ireland now joins France and Denmark as the only EU countries with import approval.

COUNTRY	PRODUCT	DATE	POLICY CATEGORY/INSTRUMENT	DESCRIPTION
Kazakhstan	All	Nov-13	Tariff rate quota	Reduced the TRQ volume for fresh, chilled and frozen beef, from 15 400 tonnes in 2013 to 15 320 tonnes in 2014. Additionally, Kazakhstan provided separate allocations for chilled and frozen beef in 2014, allocating 20 000 tonnes for chilled beef and 15 300 tonnes for frozen beef. In 2014, the Kazakhstani TRQ volumes for fresh, chilled and frozen pork and pork trimmings will remain the same as in 2013 at 9 700 tonnes, while the TRQ volume for poultry will increase from 100 000 tonnes in 2013 to 110 000 tonnes in 2014.
Mexico	All	Jan-14	Market regulation	Announced almost USD 50 million to support inspection and regulation services for abattoirs and processing plants under federal oversight and inspection.
Mexico	Poultry	Feb-14	Tariff rate quota	Extended the period during which Mexican companies can import poultry under a 300 000-tonne duty-free, TRQ for poultry meat (specifically, chicken) until the end of 2015.
Republic of Korea	Poultry	Jan-14	Export ban	Suspended all poultry exports due to an outbreak of highly pathogenic avian influenza, H5N8 type, pending OIE certification of disease-free status.
Russia	All	Nov-13	Tariff rate quota	Confirmed TRQ volumes for 2014, the same as in 2013, consistent with WTO commitments.
	Pigmeat	Jan-14	Import ban lifted	Lifted ban on Belarus pigmeat imports, following concerns about ASF.
	Pigmeat	Jan-14	Import ban	Prohibited imports of pigmeat and live pigs from the EU, following limited instances of ASF in Lithuania and Poland.
	Pigmeat	Feb-14	Import ban lifted	Resumed imports of pigmeat from Brazil, following a prohibition based on concerns about its food safety monitoring systems.
	Pigmeat	Mar-14	Import ban lifted	Resumed imports of pigmeat from the United States, providing it is certified as ractopamine free.
	Pigmeat	Mar-14	Import ban	Imposed a temporary ban on pigmeat imports from Ukraine, due to concerns over ability of local veterinary services to monitor meat quality.
	Beef	Mar-14	Import ban	Suspended purchase of beef from eight Paraguayan meat plants following detection of prohibited substances in the meat.
South Africa	All	Feb-14	Export ban lifted	Lifted ban on export of red meat when international authorities declared South Africa a disease-free zone. The three-year export ban had been due to an outbreak of foot-and-mouth disease.
Thailand	All	Dec-13	Import ban lifted	Lifted ban on United States live cattle imports, following World Animal Health Organization’s reclassification of the US as a “negligible bovine spongiform encephalopathy (BSE) risk”.

* 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] (*thousand tonnes, carcass weight equivalent*)

	Production		Imports		Exports		Utilization	
	2013 *estim.*	2014 *f'cast*	2013 *estim.*	2014 *f'cast*	2013 *estim.*	2014 *f'cast*	2013 *estim.*	2014 *f'cast*
ASIA	**131 486**	**133 398**	**15 296**	**15 645**	**5 367**	**5 638**	**141 414**	**143 405**
China	85 534	86 272	4 407	4 499	1 900	1 925	88 041	88 847
of which Hong Kong, SAR	165	166	2 132	2 174	913	930	1 384	1 410
India	6 675	6 986	1	1	1 774	1 893	4 902	5 094
Indonesia	3 175	3 203	63	68	5	5	3 233	3 265
Iran, Islamic Republic of	2 556	2 612	138	149	48	50	2 645	2 711
Japan	3 243	3 235	3 102	3 106	13	13	6 332	6 328
Korea, Republic of	2 144	2 100	875	877	42	48	2 977	2 929
Malaysia	1 637	1 666	267	269	50	46	1 854	1 890
Pakistan	2 963	3 039	4	4	65	72	2 901	2 971
Philippines	3 105	3 233	334	331	14	15	3 425	3 549
Saudi Arabia	953	1 085	1 090	1 152	53	62	1 989	2 176
Singapore	117	119	312	303	60	29	370	393
Thailand	2 397	2 511	38	35	800	853	1 635	1 693
Turkey	2 977	3 105	377	376	394	460	2 960	3 021
Viet Nam	4 302	4 402	1 351	1 336	20	22	5 633	5 717
AFRICA	**16 537**	**16 713**	**2 899**	**2 992**	**171**	**179**	**19 265**	**19 526**
Algeria	713	730	89	98	-	-	802	827
Angola	229	238	631	672	-	-	860	910
Egypt	2 077	2 117	411	394	6	6	2 483	2 504
Nigeria	1 540	1 568	7	4	1	1	1 545	1 572
South Africa	2 774	2 799	436	433	47	51	3 162	3 180
CENTRAL AMERICA	**8 864**	**8 962**	**2 806**	**2 805**	**477**	**501**	**11 193**	**11 265**
Cuba	283	284	257	276	-	-	540	560
Mexico	6 155	6 228	1 802	1 796	250	268	7 707	7 755
SOUTH AMERICA	**39 875**	**40 609**	**1 127**	**1 170**	**8 012**	**8 389**	**32 989**	**33 389**
Argentina	4 929	5 041	23	26	602	683	4 350	4 384
Brazil	25 257	25 742	64	61	6 423	6 644	18 898	19 159
Chile	1 438	1 453	360	385	292	301	1 506	1 538
Colombia	2 257	2 287	122	124	42	46	2 337	2 364
Uruguay	678	723	39	40	341	377	377	385
Venezuela	1 508	1 527	422	438	-	-	1 930	1 964
NORTH AMERICA	**47 209**	**46 885**	**2 398**	**2 434**	**9 290**	**9 298**	**40 317**	**40 021**
Canada	4 430	4 469	776	771	1 720	1 734	3 487	3 506
United States of America	42 778	42 415	1 608	1 648	7 569	7 564	36 816	36 500
EUROPE	**58 525**	**59 356**	**4 590**	**4 531**	**4 694**	**4 508**	**58 421**	**59 380**
Belarus	1 144	1 157	122	128	368	410	898	875
European Union	44 897	45 203	1 336	1 345	4 016	3 822	42 217	42 725
Russian Federation	8 162	8 513	2 370	2 330	36	39	10 495	10 803
Ukraine	2 508	2 654	277	237	169	127	2 615	2 765
OCEANIA	**6 174**	**6 057**	**421**	**416**	**2 891**	**2 826**	**3 704**	**3 647**
Australia	4 323	4 248	209	208	1 965	1 944	2 567	2 512
New Zealand	1 340	1 296	62	62	923	879	478	479
WORLD	**308 486**	**311 795**	**29 444**	**29 889**	**30 874**	**31 309**	**307 057**	**310 374**
Developing countries	187 645	190 504	18 197	18 615	13 955	14 627	191 887	194 491
Developed countries	120 842	121 290	11 247	11 274	16 919	16 682	115 170	115 883
LIFDCs	22 330	22 918	1 842	1 904	1 940	2 063	22 231	22 759
LDCs	9 716	9 836	1 506	1 594	10	11	11 211	11 419

[1] Including "other meat".

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

	Production		Imports		Exports		Utilization	
	2013 *estim.*	**2014** *f'cast*	**2013** *estim.*	**2014** *f'cast*	**2013** *estim.*	**2014** *f'cast*	**2013** *estim.*	**2014** *f'cast*
ASIA	**17 856**	**18 262**	**4 147**	**4 390**	**2 123**	**2 223**	**19 874**	**20 421**
China	6 704	6 839	1 046	1 233	179	169	7 570	7 903
India	2 851	3 001	-	-	1 747	1 852	1 104	1 149
Indonesia	530	521	54	61	1	1	583	580
Iran, Islamic Republic of	251	250	105	121	3	3	354	368
Japan	504	494	758	771	2	2	1 258	1 259
Korea, Republic of	323	304	327	337	6	6	644	634
Malaysia	31	31	181	186	9	10	202	207
Pakistan	1 630	1 675	3	3	28	32	1 605	1 646
Philippines	297	298	108	105	3	3	401	400
AFRICA	**5 932**	**5 980**	**714**	**707**	**85**	**88**	**6 561**	**6 598**
Algeria	135	137	83	91	-	-	218	228
Angola	102	104	135	135	-	-	237	239
Egypt	880	896	319	310	2	2	1 197	1 204
South Africa	845	846	6	6	15	15	835	837
CENTRAL AMERICA	**2 528**	**2 548**	**389**	**400**	**290**	**299**	**2 627**	**2 650**
Mexico	1 808	1 820	247	256	118	126	1 937	1 950
SOUTH AMERICA	**15 378**	**15 816**	**521**	**537**	**2 623**	**2 861**	**13 276**	**13 492**
Argentina	2 673	2 709	-	-	204	249	2 469	2 460
Brazil	9 596	9 920	50	48	1 767	1 904	7 879	8 064
Chile	202	207	228	243	6	6	424	445
Colombia	839	840	4	4	41	45	802	799
Uruguay	519	557	1	1	302	330	219	228
Venezuela	493	491	221	224	-	-	714	715
NORTH AMERICA	**12 906**	**12 384**	**1 212**	**1 245**	**1 528**	**1 499**	**12 631**	**12 118**
Canada	1 149	1 154	281	283	305	307	1 139	1 133
United States of America	11 757	11 230	927	958	1 223	1 192	11 487	10 982
EUROPE	**10 220**	**10 286**	**1 311**	**1 334**	**479**	**493**	**11 052**	**11 127**
European Union	7 371	7 445	332	354	284	286	7 419	7 513
Russian Federation	1 663	1 640	857	862	8	8	2 512	2 494
Ukraine	419	439	6	6	15	17	410	428
OCEANIA	**2 890**	**2 790**	**60**	**61**	**1 932**	**1 916**	**1 004**	**924**
Australia	2 242	2 152	10	10	1 446	1 441	791	710
New Zealand	628	618	14	15	483	472	159	160
WORLD	**67 679**	**68 033**	**8 335**	**8 655**	**9 053**	**9 368**	**66 980**	**67 288**
Developing countries	38 593	39 490	4 876	5 118	5 103	5 452	38 364	39 154
Developed countries	29 086	28 542	3 458	3 536	3 951	3 917	28 616	28 134
LIFDCs	8 324	8 549	247	240	1 884	1 990	6 687	6 799
LDCs	3 410	3 461	194	200	3	4	3 600	3 657

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

	Production		Imports		Exports		Utilization	
	2013 *estim.*	2014 *f'cast*	2013 *estim.*	2014 *f'cast*	2013 *estim.*	2014 *f'cast*	2013 *estim.*	2014 *f'cast*
ASIA	**8 038**	**8 115**	**549**	**530**	**53**	**64**	**8 534**	**8 581**
Bangladesh	205	206	-	-	-	-	205	206
China	4 002	4 028	298	270	4	4	4 296	4 294
India	905	921	-	-	20	33	885	888
Iran, Islamic Republic of	290	300	4	4	-	-	294	304
Pakistan	455	456	-	-	20	19	435	437
Saudi Arabia	130	132	20	25	5	4	145	152
Turkey	325	330	1	1	-	-	326	331
AFRICA	**2 969**	**3 022**	**29**	**30**	**33**	**33**	**2 965**	**3 019**
Algeria	286	300	3	3	-	-	289	303
Nigeria	475	481	-	-	-	-	475	481
South Africa	175	173	4	3	-	-	179	175
Sudan	483	485	-	-	5	4	478	481
CENTRAL AMERICA	**129**	**131**	**22**	**20**	**-**	**-**	**151**	**151**
Mexico	99	100	12	10	-	-	111	110
SOUTH AMERICA	**331**	**335**	**9**	**7**	**26**	**32**	**314**	**310**
Brazil	115	117	9	7	-	-	124	124
NORTH AMERICA	**90**	**91**	**105**	**104**	**4**	**5**	**190**	**189**
United States of America	73	74	85	84	4	5	155	153
EUROPE	**1 271**	**1 267**	**185**	**183**	**39**	**38**	**1 417**	**1 411**
European Union	962	957	164	154	31	31	1 095	1 081
Russian Federation	192	194	10	10	-	-	202	204
OCEANIA	**1 066**	**999**	**35**	**30**	**832**	**778**	**268**	**251**
Australia	621	594	1	1	434	416	188	180
New Zealand	445	405	3	3	399	363	49	46
WORLD	**13 891**	**13 959**	**932**	**904**	**987**	**951**	**13 836**	**13 911**
Developing countries	10 685	10 818	615	591	112	129	11 188	11 279
Developed countries	3 206	3 141	317	313	876	822	2 648	2 632
LIFDCs	3 733	3 785	34	32	27	39	3 740	3 778
LDCs	1 859	1 879	6	6	5	4	1 859	1 881

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

	Production		Imports		Exports		Utilization	
	2013 *estim.*	**2014** *f'cast*	**2013** *estim.*	**2014** *f'cast*	**2013** *estim.*	**2014** *f'cast*	**2013** *estim.*	**2014** *f'cast*
ASIA	**65 573**	**66 579**	**3 387**	**3 275**	**550**	**550**	**68 400**	**69 356**
China	54 777	55 668	1 352	1 251	441	466	55 688	56 453
of which Hong Kong, SAR	121	122	565	540	177	187	509	475
India	328	327	1	1	-	1	329	327
Indonesia	736	754	2	1	-	-	738	754
Japan	1 305	1 309	1 243	1 240	2	2	2 546	2 546
Korea, D.P.R.	113	113	2	2	-	-	115	115
Korea, Republic of	1 095	1 050	395	380	3	5	1 476	1 479
Malaysia	234	235	15	17	8	9	241	243
Philippines	1 728	1 780	122	123	3	3	1 848	1 900
Thailand	890	895	4	4	30	34	864	865
Viet Nam	3 226	3 284	35	35	20	21	3 241	3 298
AFRICA	**1 217**	**1 238**	**296**	**305**	**12**	**13**	**1 501**	**1 530**
Madagascar	56	57	-	-	-	-	56	57
Nigeria	250	255	1	1	-	-	251	256
South Africa	215	221	36	35	7	8	244	247
Uganda	114	112	-	1	-	-	114	112
CENTRAL AMERICA	**1 797**	**1 823**	**886**	**852**	**141**	**151**	**2 541**	**2 524**
Cuba	164	162	45	47	-	-	209	209
Mexico	1 270	1 290	682	650	121	131	1 831	1 810
SOUTH AMERICA	**5 380**	**5 489**	**204**	**210**	**814**	**851**	**4 769**	**4 849**
Argentina	356	367	18	21	1	1	373	386
Brazil	3 505	3 573	2	2	651	684	2 856	2 891
Chile	531	529	49	56	158	162	422	422
Colombia	240	244	60	56	-	-	300	300
Venezuela	168	170	18	18	-	-	186	188
NORTH AMERICA	**12 522**	**12 341**	**727**	**729**	**3 377**	**3 322**	**9 860**	**9 757**
Canada	1 992	2 008	246	230	1 205	1 210	1 033	1 030
United States of America	10 530	10 332	475	494	2 173	2 112	8 822	8 722
EUROPE	**27 406**	**27 657**	**1 385**	**1 339**	**2 451**	**2 299**	**26 339**	**26 697**
Belarus	463	476	96	96	119	148	440	424
European Union	22 682	22 818	17	17	2 288	2 100	20 411	20 735
Russian Federation	2 611	2 686	906	870	3	3	3 514	3 553
Serbia	252	252	20	20	9	11	263	262
Ukraine	784	810	195	185	8	9	970	986
OCEANIA	**506**	**511**	**247**	**243**	**35**	**36**	**719**	**718**
Australia	357	360	184	181	34	35	507	506
Papua New Guinea	78	80	8	8	-	-	86	88
WORLD	**114 281**	**115 515**	**7 060**	**6 884**	**7 373**	**7 215**	**113 947**	**115 246**
Developing countries	72 247	73 400	3 464	3 325	1 507	1 554	74 195	75 223
Developed countries	42 033	42 116	3 596	3 558	5 866	5 661	39 752	40 022
LIFDCs	3 231	3 300	273	279	7	8	3 498	3 571
LDCs	1 467	1 493	210	218	-	1	1 677	1 710

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

	Production		Imports		Exports		Utilization	
	2013 *estim.*	2014 *f'cast*	2013 *estim.*	2014 *f'cast*	2013 *estim.*	2014 *f'cast*	2013 *estim.*	2014 *f'cast*
ASIA	**38 083**	**38 497**	**7 158**	**7 398**	**2 616**	**2 775**	**42 625**	**43 125**
China	18 584	18 262	1 707	1 740	1 260	1 272	19 030	18 730
of which Hong Kong, SAR	29	29	988	932	631	640	386	321
India	2 443	2 589	-	-	6	6	2 437	2 583
Indonesia	1 791	1 809	1	1	-	-	1 792	1 810
Iran, Islamic Republic of	1 998	2 045	26	23	44	45	1 981	2 023
Japan	1 422	1 420	1 066	1 060	9	9	2 479	2 475
Korea, Republic of	716	735	140	146	34	37	822	844
Kuwait	42	45	130	141	1	-	171	186
Malaysia	1 370	1 398	46	42	32	28	1 384	1 412
Saudi Arabia	714	843	887	950	20	30	1 581	1 763
Singapore	97	99	145	135	12	13	230	221
Thailand	1 305	1 414	12	9	734	783	583	640
Turkey	1 790	1 851	374	374	373	441	1 791	1 784
Yemen	147	142	113	118	-	-	260	260
AFRICA	**4 977**	**5 040**	**1 829**	**1 917**	**33**	**37**	**6 772**	**6 920**
Angola	26	30	340	375	-	-	366	405
South Africa	1 516	1 536	390	389	19	21	1 888	1 904
CENTRAL AMERICA	**4 290**	**4 340**	**1 491**	**1 520**	**44**	**49**	**5 737**	**5 812**
Cuba	35	36	200	210	-	-	235	246
Mexico	2 875	2 915	848	865	10	11	3 713	3 770
SOUTH AMERICA	**18 475**	**18 726**	**391**	**413**	**4 482**	**4 579**	**14 385**	**14 560**
Argentina	1 716	1 783	4	4	363	400	1 357	1 387
Brazil	12 010	12 100	3	4	3 981	4 031	8 033	8 073
Chile	676	688	83	86	118	123	641	651
Venezuela	838	856	182	195	-	-	1 019	1 051
NORTH AMERICA	**21 440**	**21 821**	**344**	**344**	**4 341**	**4 434**	**17 452**	**17 747**
Canada	1 250	1 267	227	235	190	196	1 286	1 307
United States of America	20 190	20 553	112	103	4 150	4 238	16 160	16 434
EUROPE	**18 430**	**18 950**	**1 543**	**1 509**	**1 640**	**1 593**	**18 333**	**18 866**
European Union	12 837	12 940	722	719	1 331	1 323	12 228	12 336
Russian Federation	3 606	3 902	551	540	25	27	4 132	4 415
Ukraine	1 255	1 355	75	45	146	100	1 184	1 300
OCEANIA	**1 283**	**1 329**	**75**	**78**	**51**	**55**	**1 307**	**1 352**
Australia	1 082	1 121	13	14	37	39	1 057	1 095
New Zealand	175	182	1	1	13	16	163	167
WORLD	**106 953**	**108 677**	**12 831**	**13 167**	**13 194**	**13 509**	**106 598**	**108 356**
Developing countries	62 082	62 830	9 151	9 496	7 137	7 396	64 095	64 930
Developed countries	44 870	45 847	3 680	3 671	6 056	6 113	42 503	43 426
LIFDCs	5 464	5 712	1 259	1 324	21	23	6 702	7 014
LDCs	2 333	2 360	1 070	1 143	1	2	3 402	3 502