MEAT AND MEAT PRODUCTS

World meat production is anticipated to grow modestly in 2014 to 311.6 million tonnes, 3 million tonnes or 1.1 percent above 2013. The expansion is likely 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, with the FAO Meat Price Index generally oscillating around 185 points. Since April 2014, the Index has registered further upward movement, reaching 208 points in September. Prices rose for all categories, especially bovine meat, although towards the end of the period, some reduction was evidenced for porcine and ovine meat.

Global meat trade is forecast to expand at a moderate rate of 2.3 percent in 2014, to 31.6 million tonnes. The anticipated growth would be less than the average for recent years, due to a variety of factors, including production constraints in some of the principal exporting countries, animal health concerns and trade restrictions. There are diverging projected trade trends for the various types of meat, with growth forecast for bovine, pigmeat and poultry, and decline forecast for ovine meat. Poultry remains the main product traded, representing 43 percent of the total, followed by bovine, pig and ovine meat, respectively.

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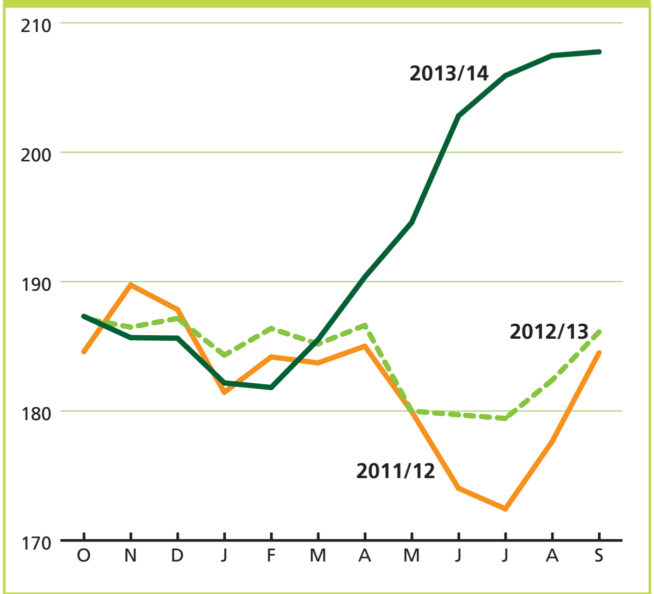
FAO INTERNATIONAL MEAT PRICE INDEX (2002-2004 = 100)



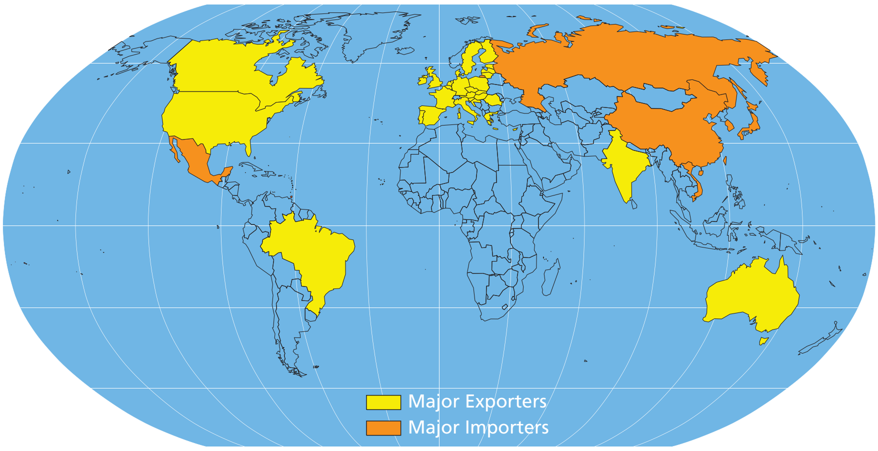
WORLD MEAT MARKET AT A GLANCE

	2012	2013 *estim.*	2014 *f'cast*	Change: 2014 over 2013
		million tonnes		%
WORLD BALANCE				
Production	**304.2**	**308.3**	**311.6**	**1.1**
Bovine meat	67.0	67.8	68.3	0.8
Poultry meat	105.4	106.4	107.6	1.1
Pigmeat	112.4	114.5	116.1	1.4
Ovine meat	13.7	13.9	14.0	0.6
Trade	**29.6**	**30.9**	**31.6**	**2.3**
Bovine meat	8.0	9.0	9.3	3.4
Poultry meat	13.0	13.2	13.5	2.1
Pigmeat	7.5	7.4	7.5	2.1
Ovine meat	0.8	1.0	1.0	-1.8
SUPPLY AND DEMAND INDICATORS				
Per caput food consumption:				
World (kg/yr)	42.8	42.8	42.8	-0.1
Developed (kg/yr)	76.2	75.7	75.5	-0.2
Developing (kg/yr)	33.4	33.7	33.8	0.2

FAO MEAT PRICE INDEX (2002-2004=100)	**2012**	**2013**	**2014** ***Jan-Sep***	**Change: Jan-Sep 2014 over Jan-Sep 2013 %**
	182	184	195	6.6

MEAT AND MEAT PRODUCTS

Major Meat Exporters and Importers



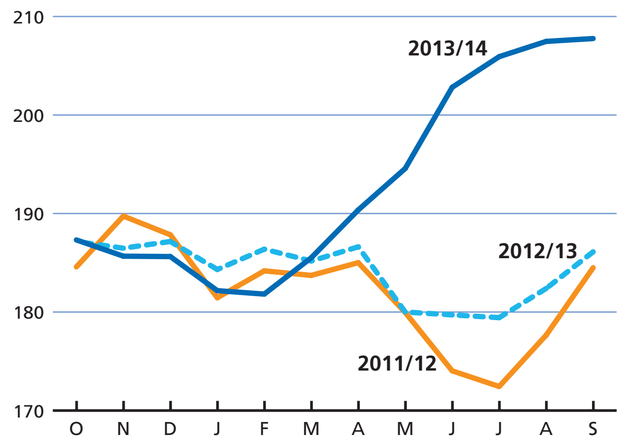
Limited production growth; trade mixed

World meat production is anticipated to grow modestly in 2014 to 311.6 million tonnes, 3 million tonnes or 1.1 percent above 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, with the **FAO Meat Price Index** generally oscillating around 185 points. Since April 2014, the Index has registered further upward movement, reaching 208 points in September. Prices rose for all categories, especially bovine meat, although towards the end of the period, some reduction was evidenced for porcine and ovine meat.

Global meat trade is forecast to expand at a moderate rate of 2.3 percent in 2014, to 31.6 million tonnes. The anticipated growth would be less than the average for recent years, due to a variety of causes, including production constraints in some of the principal exporting countries, animal health concerns and trade restrictions. There are diverging projected trade trends for the various types of meat, with growth forecast for bovine, pigmeat and poultry, and decline forecast for ovine meat. Poultry remains the main product traded, representing 43 percent of the total, followed by bovine, pig and ovine meat, respectively.

Figure 1. Meat prices reach historic highs



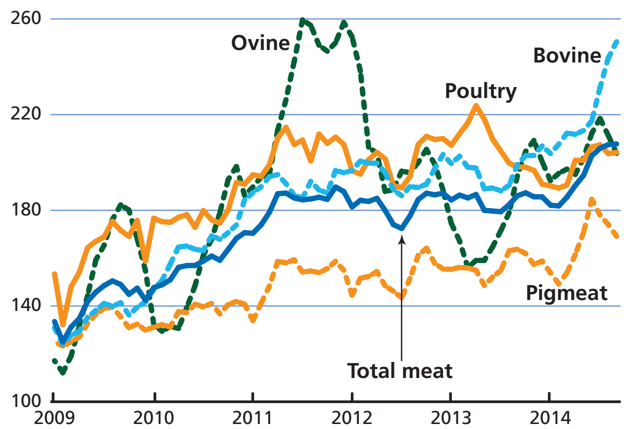


Table 1. World meat market at a glance

	2012	2013 *estim.*	2014 *f'cast*	Change: 2014 over 2013
		million tonnes		%
WORLD BALANCE				
Production	**304.2**	**308.3**	**311.6**	**1.1**
Bovine meat	67.0	67.8	68.3	0.8
Poultry meat	105.4	106.4	107.6	1.1
Pigmeat	112.4	114.5	116.1	1.4
Ovine meat	13.7	13.9	14.0	0.6
Trade	**29.6**	**30.9**	**31.6**	**2.3**
Bovine meat	8.0	9.0	9.3	3.4
Poultry meat	13.0	13.2	13.5	2.1
Pigmeat	7.5	7.4	7.5	2.1
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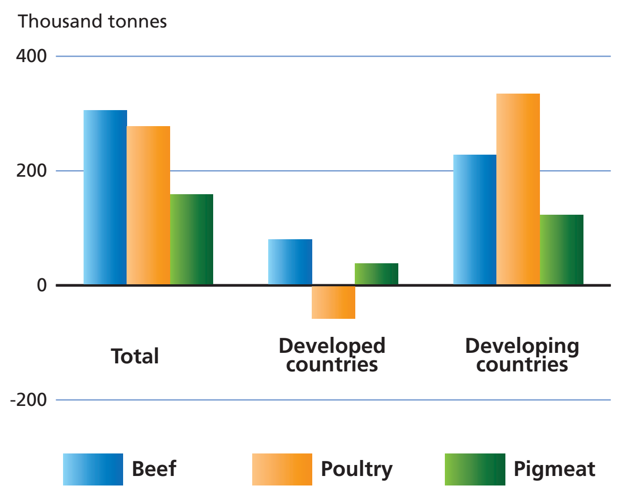
Developing (kg/yr)	33.4	33.7	33.8	0.2
FAO MEAT PRICE INDEX (2002-2004=100)	**2012**	**2013**	**2014** *Jan-Sep*	**Change: Jan-Sep 2014 over Jan-Sep 2013 %**
	182	184	195	6.6

Figure 2. Projected changes in meat exports, 2014



BOVINE MEAT

Production: limited growth

Bovine meat production is forecast to remain largely unchanged at around 68 million tonnes, only 0.8 percent more than in 2013 – continuing a trend of limited growth that has been evident for several years.

The small increase in world production is being led by developing countries, which collectively account for almost 60 percent of the total. As a group, developing countries are forecast to record 2.3 percent growth, concentrated principally in *Latin America and the Caribbean*, and *Asia*. The developed countries are predicted to experience a 1.3 percent decline in output, mainly due to a fall in North America.

In *South America*, cattle availabilities and slaughter have been rising, particularly in **Brazil,**. The country, which is the second largest producer after the United States, is anticipated to account for most of the regional growth, with production projected to rise 3.4 percent 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 obliged the industry to focus increasingly on internal demand, which absorbs over 90 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 production growth is anticipated, spurred by international demand and sustained cattle prices, and supported by an expanding herd and productivity increases.

In *Asia*, **India**, the fifth largest bovine meat producer, continues to see the industry grow, supported by government programmes to utilize male buffalo calves from the country's expanding dairy herd. Output is forecast to drop in the **Republic of Korea**, where low profitability has led to herd reduction. In **China**, production is anticipated to show moderate growth to 6.8 million tonnes. High slaughter rates are reported among small-producers, prompted by strong cattle prices and difficulties in meeting new production standards. Most parts of *Africa* received adequate rainfall during the current season, which improved pasture conditions and led to a moderate increase in bovine meat production. However, due to a delay in the onset of seasonal rains in parts of East Africa, pasture and fodder and feed supplies in the subregion suffered. As a consequence, production growth may be constrained in **Ethiopia, Kenya, Somalia,** northern **Tanzania** and eastern **Uganda**. Furthermore, outbreaks of foot-and-mouth disease (FMD) in east-central Kenya could have a negative impact on production, although 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). The sector is benefiting from a government-run FMD vaccination programme and legislation limiting calf slaughter. Output in southern Africa is set to increase as a result of favourable rains which have promoted pasture growth and feed and forage production. Furthermore, in **South Africa**, a rise in cattle prices should underpin improved profitability and boost production.

Overall, bovine meat output in ***developed countries*** is forecast to fall by 1.3 percent, to 28.7 million tonnes. In the **United States**, the world's largest producer, prolonged and extensive dry conditions caused a fall-off in the production of calves which led to an herd reduction. Consequently, beef output could decline by 4.5 percent, to 11.2 million tonnes this year, its lowest level since 1994. The long-term decline in the cattle herd in neighbouring **Canada**, evident since 1992, is expected to continue. In **Oceania**, the after-effects of drought are impinging on production. In **Australia**, slaughter rates increased markedly in 2013 and early 2014, prompted by a reduced availability of pasture and fodder. Diminished herd size and rebuilding will result in lower output for 2014 overall, with a decline of 1.4 percent to 2.3 million tonnes anticipated. In **New Zealand**, production is foreseen to be moderately higher, at around 608 000 tonnes. The beef industry in New Zealand is highly dependent on the dairy sector which provides 80 percent of the total supply in the form of culled cows and male calves for fattening. In the **Russian Federation**, improved productivity and slaughtering facilities may be sufficient to counterbalance long-term herd reduction, resulting in a small increase in output overall. In the **EU**, the world's third largest beef producer at 7.5 million tonnes, the prolonged reduction in the cattle herd has reversed as a result of dairy sector expansion. Bovine meat production is anticipated to rise by 1.4 percent in 2014, mainly owing to a rise in the number of male dairy calves for fattening.

Trade: United States and China underpin import demand; India becomes the leading bovine meat exporter

World trade in bovine meat is anticipated to grow by 3.4 percent, to 9.3 million tonnes, despite international prices being at their historic maximum. Consumer demand, rising incomes and a shortage of domestic supplies in some countries are important contributors to trade expansion.

China is expected to record a significant increase in imports, although not to the same degree as in 2013, when they doubled. Total imports could exceed 1.1 million tonnes in 2014, 6 percent more than last year, confirming China's position as the main world market for bovine meat. Demand continues to be stimulated by rising incomes and growth in meals outside the home. Additionally, following outbreaks of avian influenza, some consumers have switched from poultry to other meats. Elsewhere in **Asia**, imports by the **Islamic Republic of Iran**, the **Republic of Korea** and **Malaysia** could increase, as domestic production is forecast to be either stable or decrease. The **United States**, the world's second largest importer, is also forecast to step up its purchases, to compensate for a short-fall in national production. By contrast, high international prices and increasing domestic production are expected to result in falling purchases of bovine meat by the **Russian Federation.** In the first four months of 2014, deliveries to the country were 23 percent down, year-on-year. The Federation's ban on bovine meat imports from a number of countries introduced in August is not expected to have any significant impact on world trade, as this group of countries collectively supplied less than 10 percent of the Federation's imports in 2013 (Table 2). Purchases by the **EU** may decline slightly, stemming from growth in domestic production. A number of other importers may see trade fall or stagnate in response to high international prices, including **Egypt**, **Canada** and **Mexico**.

Strong demand and elevated prices are projected to stimulate bovine meat exports, despite production constraints in some countries. Much of the expected expansion in trade is anticipated to be met by **India, Brazil, Australia** and **New Zealand.** India, in particular, may see a strong rise in its sales of buffalo meat (carabeef), in the order of 10 percent. As a consequence, for the first time, India would become the leading exporter of bovine meat, shipping 1.9 million tonnes, compared to second-placed Brazil's 1.8 million tonnes. India's main markets are Asia and North Africa. The popularity of carabeef rests on its price competitiveness – where quotations are 30 percent less than for beef - plus its low fat content, excellent processing characteristics and halal certification. The favourable market conditions for bovine meat are expected to stimulate exports from **Canada**, the **EU**, **Paraguay** and **Uruguay**. On the other hand, reduced domestic production is anticipated to depress exports by the **United States**. Sales by **Argentina** are also expected to fall, as government-imposed limitations on trade favour supplying the domestic market.

PIGMEAT

Production: Asia sustains growth

World production of pigmeat is anticipated to grow by 1.4 percent to 116.1 million tonnes in 2014, aided by lower feed costs. The increase in output is forecast to stem from developing countries, where over 60 percent of production originates, while little change is expected in the developed countries. ***Asia*** is the leading pigmeat producing region, accounting for more than half of the world total. Strong consumer demand and government support policies are anticipated to combine to boost **China**'s output by 2.3 percent, to 56.7 million tonnes, equivalent to almost half of the world total. Elsewhere in Asia, **Vietnam**, the **Philippines** and **Indonesia** are foreseen to register similar rates of growth**.** Conversely, in **Japan** and the **Republic of Korea**, production is anticipated to fall, reflecting the diminished breeding herds and outbreaks of porcine endemic diarrhoea (PED), which have reduced piglet numbers.

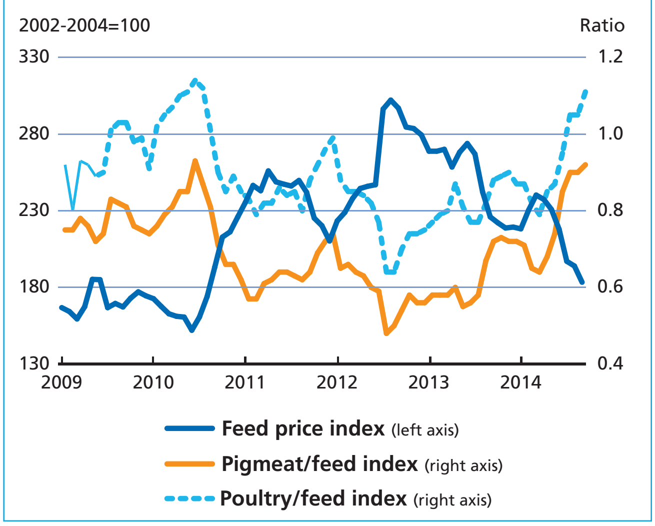
In the Americas, **Brazil**, the world's fourth largest producer, is set to increase output to a record 3.5 million tonnes, stimulated by reduced feed costs and favourable export prices. Steady growth is also anticipated for **Mexico**, underpinned by improved genetics and productivity which translate into more piglets per litter and higher animal weights.

Production in the **EU,** the second largest producer after China, is forecast to be unchanged at 22.1 million tonnes, even though compliance with animal welfare regulations relating to the housing of sows led to a fall in the breeding herd in some member-states. In the **United States**, PED is projected to cause a 1.9 percent fall in pigmeat output, despite heavier slaughter weights. **Canada**'s production is forecast to increase only slightly, due to some smaller producers ceasing operations. In the **Russian Federation**, government policies favouring large-scale farms have resulted in production doubling over the past decade. The trend towards increased output may be amplified in 2014, following prohibitions on pork imports from the EU and Canada, which together supplied two-thirds of the Federation's imports in 2013 (Table 2). African swine fever (ASF) in **Belarus** has caused a marked decline in the pig population and, consequently, production is forecast to fall substantially.

Trade: animal diseases and trade prohibitions take centre stage

Trade in pigmeat is expected to recover by 2.1 percent to 7.5 million tonnes in 2014, following a decrease in 2013. Three countries – the United States, the EU and Canada – account for three-quarters of the world pig meat exports. Adding Brazil and China to the group brings the total to more than 90 percent. Despite reduced production, high international prices are expected to boost sales by the **United States**, where exports for the first six months of the year were up by 7.4 percent. Also, in the case of the **EU,** strong sales to Asia – especially to China and Japan – are expected to largely counterbalance the lost

Figure 3. Pork and poultry producers benefit from reduced feed costs



trade with the Russian Federation, its main market in 2013. The Federation banned imports of EU pigmeat at the end of January, consequent on a small number of cases of African Swine Fever (ASF) in the wild-boar population in Lithuania and Poland. **Canada**, which in recent years has maintained a share of around 15 percent of world trade, is expect to maintain a similar level of sales this year. Largely unchanged deliveries are also foreseen for **Brazil**, where exports up to the end of July were the same as the previous year's. While Brazil has increased its exports of pigmeat to the Russian Federation following the ban on imports from the EU – March–July 2014 sales were a third higher than the same period in 2013 – there was a proportionate drop in sales to China (Hong Kong SAR).

Rising demand, in **China** and **Mexico**, and PED-reduced domestic production in **Japan**, the **United States** and the **Republic of Korea**, led five of the six main importing countries – which account for three-fifths of world trade – to increase their purchases by an average of 10 percent during the first half of 2014. While this momentum may not be fully maintained for the remainder of the year, their combined demand is anticipated to be sufficient to compensate for a substantial fall in imports by the **Russian Federation**, following the ban imposed on imports by a group of countries which had collectively supplied 70 percent of its foreign purchases in 2013. Trade data up until April shows imports by the Federation were down by a third – reflecting in part improved domestic supplies. By way of context, growing domestic production meant that the Federation had already cut imports heavily, by 26 percent, in 2013. Imports by **Canada** are also expected to fall, as a result of a substantial price rise in the United States, its principal source of supply.

POULTRY

Production: China weighs on world total

A second year of limited growth is foreseen for poultry production in 2014. Output is expected to rise by 1.1 percent to 107.6 million tonnes, much slower than the 3 percent per year trend observed over the past decade. While falling feed prices have supported growth in many countries, industry challenges in **China** continue to weigh on the world total. In China, concern over H7N9, including a fresh outbreak among the human population at the start of 2014, has depressed demand for poultry and also limited the availability of live birds for direct consumption. Poultry production is expected to fall by 4.8 percent, or 877 000 tonnes, in 2014. As a consequence, poultry is the only category of meat where output is anticipated to increase more in absolute terms in the developed countries than in the developing countries. Excluding China, the tendency in all the other largest producing countries is expected to be positive. Production in the **United States**, the principal producer, could grow by 1.8 percent, to 20.6 million tonnes. Elsewhere, the other major producers likely to witness gains include the **EU**, **Brazil** and the **Russian Federation**, **Mexico**, **India,** the **Islamic Republic of Iran** and **Turkey.**

Trade: Slow growth

Poultry, the most traded meat category, accounts for almost 45 percent of total meat trade. Its popularity stems from its price competitiveness compared with other types of meat and its wide acceptance and adaptability to national cuisines. Although poultry trade volume has increased by 55 percent over the past decade, growth has slowed since 2012. This trend is expected to continue in 2014, when exports could reach 13.5 million tonnes, an increase of 2.6 percent, mainly reflecting augmented production in importing countries. The two major importing countries, **China** and **Japan**, are projected to maintain purchase levels similar to the previous year. In the case of China, a fall in imports by mainland China is expected to be counterbalance by increased imports by Hong Kong SAR, in part a result of prohibitions of traffic in live birds from the mainland. Stable to positive growth in imports by other major markets, including, **Saudi Arabia**, the **EU** and **Vietnam**, is expected to contrast with a substantial fall in purchases by the **Russian Federation**. In the Federation, imports are provisionally estimated to fall by 30 percent, stemming from abundant domestic production, which led to a fall in prices, and the August 2014 ban on imports from certain countries. In the case of poultry, this group of countries had supplied approximately three-quarters of the Federation's overseas purchases in 2013, which means identifying alternative sources of supply will cause some disruption. In *Africa*, imports as a whole are forecast to rise by 4.6 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 grow by 2.6 percent.

The four leading exporters, **Brazil,** the **United States** and **China**, which together account for almost three-quarters of global poultry exports, have seen little expansion in sales in recent years. This situation may change for 2014, when excess supplies and depressed prices in China, associated with H7N9, are anticipated to stimulate exports by as much as 7 percent. Also, sales by **Brazil** may receive a fillip from the opening up of opportunities in the Russian Federation. Leaving aside the current exceptional situation, the main drive in poultry exports has tended to come from second-tier exporters, including **Thailand, Turkey** and **Argentina**, all of which are projected to record further growth in 2014. Interestingly, each has focused on a different region or market segment: **Thailand** mainly supplies 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. As the main area of rising demand is the Middle East, this has particularly favoured Turkey, where exports for the first half of the year were up by 13 percent, having risen by 220 percent between 2009 and 2013.

OVINE MEAT

Production growth slows

Production of ovine meat is expected to be constrained by falling output in Oceania, despite moderate growth elsewhere. As a result, world output in 2014 may rise by only 0.6 percent, to 14 million tonnes. Developing countries account for three-quarters of the total, 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** are forecast to lead to a fall in production in 2014. In the **EU**, the second largest producer, the long-term decline in output stabilized last year and limited growth is forecast for 2014.

Trade to fall, following surge in 2013

With **Australia** and **New Zealand** accounting for almost 85 percent of world ovine meat exports, trade in ovine meat 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 1.8 percent to 959 000 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.** Likewise, exports by **Uruguay** are forecast to move higher, focusing on **China** and **Brazil**.

Table 2. Russian Federation: Meat imports, 2009 - 2013

	2009	2010	2011	2012	2013
PIGMEAT					
Imports (tonnes, cwe)	854 570	894 049	960 364	1 089 102	906 325
of which:			%		
Banned Countries*	58	63	72	70	67
Brazil	36	31	17	14	17
Belarus	5	8	10	13	13
BOVINE MEAT					
Imports (tonnes, cwe)	926 740	913 124	859 576	914 830	879 661
of which:			%		
Brazil	45	40	34	35	46
Paraguay	7	9	8	17	20
Belarus	10	11	9	12	15
Banned Countries*	7	22	29	20	10
POULTRY MEAT					
Imports (tonnes, cwe)	985 715	704 863	503 322	593 318	550 987
of which:			%		
Banned Countries*	91	74	69	62	62
Belarus	2	5	15	18	19
Brazil	7	21	14	12	10

* In August 2014 the Russian Federation introduced a one-year ban on imports of meat and meat products from Australia, Canada, the European Union, Norway and the United States.

MEAT: MAJOR POLICY DEVELOPMENTS: MAY TO SEPTEMBER 2014*

COUNTRY	PRODUCT	DATE	POLICY CATEGORY/INSTRUMENT	DESCRIPTION
Belarus	Bovine meat	Aug-14	Import ban lifted	Lifted a ban on live cattle imports from the EU.
China	Bovine meat	Jul-14	Import ban lifted	Lifted a ban on imports of beef from Brazil which had been put in place in late 2012, following an incidence of bovine spongiform encephalopathy.
	Pigmeat	Aug-14	Import ban lifted	Ended a 4-month ban on imports of pigs from the United States, after the introduction of agreed animal disease control protocols.
China (Hong Kong, SAR)	Poultry	May-14	Import ban	Banned poultry from Seijong Special Autonomous City, Rep. of Korea, due to an outbreak of highly pathogenic H5N8 avian influenza on a poultry farm.
	Bovine meat	Jun-14	Import access	Fully opened its market to several cuts of beef and offal from the United States.
	Poultry	Aug-14	Import ban	Banned the importation of poultry meat from Salem County, New Jersey, United States, following an outbreak of low pathogenic avian influenza.
China-Canada	Bovine meat	Jun-14	Free Trade Agreement	Signed a memorandum-of-understanding on agricultural trade and investment, which will increase market access for beef from Canada, among other products.
Egypt	Bovine meat	May-14	Import ban	Banned the import of beef from Mato Grosso state (Brazil), following a case of bovine spongiform encephalopathy.
	Bovine meat	Jul-14	State market intervention	Modified its food subsidy programme, allowing eligible citizens to receive monthly cash assistance for a range of goods, including frozen beef.
Indonesia	Beef	Aug-14	Import ban lifted	Revoked a 4-year ban on beef and cattle imports from Japan.
Japan-Australia	Beef	Jul-14	Tariff rate quota	Reduced tariff agreed for 2015, from the current 38.5% to 30.5% for frozen beef, and 32.5% for chilled beef.
Kazakhstan	Poultry	Jun-14	Tariff rate quota	Allocated second tranche – 74 250 tonnes – of 2014 import quota of 110 000 tonnes.
Mexico	Bovine meat	May-14	Import ban lifted	Revised requirements for the importation of beef and beef products from the United States.
	Poultry	Jul-14	Tariff rate quota	Announced a duty-free import quota of 300 000 tonnes for 2014, covering fresh, chilled or frozen broiler and turkey meat, and mechanically separated poultry meat.
Peru	Bovine meat	May-14	Import ban	Suspended imports of beef and beef-by-products from Brazil for a 6-month period, following a case of atypical bovine spongiform encephalopathy.
Republic of Korea	Bovine meat	Sep-14	Import ban lifted	Lifted a ban on the use of animal feed additive zilpaterol in beef, opening the door to imports containing the growth enhancer as well as domestic sales of the product.
Russian Federation	All	Aug-14	Import ban	Banned the importation of a wide range of agricultural and food products from Australia, Canada, the EU, Norway and the United States. The 1-year ban includes fresh and frozen beef and pork, poultry meat, prepared meat and sausages.
Switzerland	Pigmeat	Jul-14	Import ban	Banned pigmeat and live imports from Bulgaria, Romania and some parts of Latvia and Croatia, following cases of African swine fever.
Ukraine	All	May-14	Harmonization of protocols	Recognized EU production and control systems for products of animal origin as equivalent to those of the Ukraine, simplifying access for EU products.

* 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	**132 019**	**133 624**	**15 262**	**16 032**	**5 371**	**5 827**	**141 910**	**143 829**
China	86 049	86 623	4 407	4 642	1 900	2 111	88 556	89 154
of which Hong Kong, SAR	165	166	2 132	2 286	913	1 043	1 384	1 409
India	6 686	7 048	1	1	1 774	1 949	4 913	5 100
Indonesia	3 175	3 203	72	85	5	5	3 243	3 283
Iran, Islamic Republic of	2 556	2 612	138	170	48	58	2 645	2 724
Japan	3 286	3 262	3 102	3 258	13	13	6 375	6 506
Korea, Republic of	2 203	2 155	881	951	42	33	3 042	3 073
Malaysia	1 628	1 651	272	274	51	51	1 849	1 875
Pakistan	2 963	3 039	16	19	56	64	2 922	2 994
Philippines	3 123	3 226	334	343	14	15	3 444	3 553
Saudi Arabia	839	882	1 104	1 162	51	62	1 891	1 982
Singapore	117	119	312	318	60	62	370	376
Thailand	2 397	2 463	38	41	800	803	1 635	1 701
Turkey	2 992	3 111	377	373	408	443	2 961	3 041
Viet Nam	4 293	4 382	1 484	1 658	25	25	5 751	6 015
AFRICA	**16 542**	**16 731**	**2 849**	**2 959**	**139**	**174**	**19 252**	**19 516**
Algeria	713	730	89	96	-	1	802	825
Angola	229	238	622	679	-	-	852	917
Egypt	2 078	2 126	411	394	6	6	2 484	2 513
Nigeria	1 540	1 568	3	4	1	1	1 542	1 572
South Africa	2 774	2 808	439	456	60	94	3 153	3 170
CENTRAL AMERICA	**8 876**	**8 979**	**2 731**	**2 797**	**472**	**480**	**11 135**	**11 296**
Cuba	283	287	222	244	-	-	505	532
Mexico	6 166	6 238	1 802	1 840	250	255	7 718	7 823
SOUTH AMERICA	**39 568**	**40 588**	**1 146**	**1 199**	**8 033**	**8 255**	**32 681**	**33 533**
Argentina	5 023	5 126	23	17	602	601	4 444	4 543
Brazil	24 878	25 683	64	68	6 423	6 638	18 519	19 112
Chile	1 440	1 449	360	369	292	281	1 508	1 537
Colombia	2 257	2 281	122	125	42	33	2 337	2 374
Uruguay	654	704	39	40	362	377	332	367
Venezuela	1 508	1 527	441	486	-	-	1 949	2 012
NORTH AMERICA	**47 256**	**46 928**	**2 396**	**2 530**	**9 292**	**9 351**	**40 360**	**40 106**
Canada	4 458	4 491	776	764	1 720	1 708	3 515	3 547
United States of America	42 798	42 436	1 608	1 754	7 572	7 643	36 833	36 547
EUROPE	**57 778**	**58 543**	**4 518**	**3 962**	**4 660**	**4 546**	**57 636**	**57 959**
Belarus	1 166	1 138	123	75	368	326	920	887
European Union	44 281	44 565	1 338	1 317	4 016	3 916	41 604	41 965
Russian Federation	8 267	8 575	2 393	2 024	36	39	10 623	10 560
Ukraine	2 433	2 620	277	152	169	186	2 540	2 586
OCEANIA	**6 218**	**6 174**	**418**	**421**	**2 891**	**2 941**	**3 745**	**3 655**
Australia	4 397	4 375	209	210	1 965	2 003	2 641	2 582
New Zealand	1 311	1 286	62	64	923	934	449	416
WORLD	**308 257**	**311 567**	**29 320**	**29 900**	**30 858**	**31 573**	**306 719**	**309 894**
Developing countries	187 841	190 695	18 017	18 859	13 931	14 617	191 927	194 937
Developed countries	120 416	120 872	11 303	11 041	16 928	16 957	114 792	114 956
LIFDCs	22 363	22 974	1 776	1 808	1 935	2 112	22 205	22 670
LDCs	9 715	9 829	1 564	1 641	10	11	11 269	11 459

[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	**17 885**	**18 316**	**4 126**	**4 430**	**2 118**	**2 295**	**19 794**	**20 479**
China	6 704	6 839	1 051	1 113	179	180	7 515	7 751
India	2 851	3 001	-	-	1 747	1 920	1 104	1 081
Indonesia	530	521	63	75	-	-	593	595
Iran, Islamic Republic of	251	250	105	147	3	3	354	394
Japan	508	495	758	760	2	2	1 230	1 280
Korea, Republic of	344	340	327	342	6	4	664	703
Malaysia	30	31	184	191	10	11	205	211
Pakistan	1 630	1 675	4	5	28	29	1 606	1 651
Philippines	297	298	108	114	3	3	401	409
AFRICA	**5 933**	**5 989**	**739**	**753**	**50**	**59**	**6 623**	**6 684**
Algeria	135	137	83	89	-	-	218	226
Angola	102	104	139	143	-	-	241	247
Egypt	881	905	319	310	2	2	1 198	1 213
South Africa	845	855	8	17	19	28	834	844
CENTRAL AMERICA	**2 528**	**2 548**	**398**	**393**	**288**	**290**	**2 638**	**2 651**
Mexico	1 808	1 820	247	238	118	119	1 937	1 939
SOUTH AMERICA	**15 402**	**15 832**	**513**	**547**	**2 644**	**2 690**	**13 272**	**13 689**
Argentina	2 720	2 769	-	-	204	196	2 516	2 574
Brazil	9 596	9 920	50	54	1 767	1 808	7 879	8 166
Chile	203	202	228	234	6	5	425	431
Colombia	839	840	4	4	41	31	802	813
Uruguay	495	538	1	2	322	335	174	205
Venezuela	493	491	213	237	-	-	706	728
NORTH AMERICA	**12 929**	**12 390**	**1 211**	**1 311**	**1 531**	**1 527**	**12 622**	**12 212**
Canada	1 171	1 160	281	278	305	320	1 150	1 128
United States of America	11 757	11 230	927	1 030	1 226	1 207	11 469	11 081
EUROPE	**10 131**	**10 292**	**1 313**	**1 228**	**466**	**463**	**10 977**	**11 057**
European Union	7 366	7 455	332	329	283	296	7 415	7 488
Russian Federation	1 602	1 624	880	795	8	8	2 474	2 412
Ukraine	427	459	6	5	15	15	419	449
OCEANIA	**2 954**	**2 931**	**55**	**56**	**1 932**	**2 008**	**1 107**	**1 049**
Australia	2 335	2 303	10	11	1 446	1 485	929	899
New Zealand	599	608	14	15	483	520	130	102
WORLD	**67 762**	**68 298**	**8 355**	**8 719**	**9 029**	**9 332**	**67 034**	**67 822**
Developing countries	38 639	39 545	4 858	5 194	5 077	5 302	38 356	39 439
Developed countries	29 123	28 753	3 498	3 525	3 952	4 030	28 678	28 382
LIFDCs	8 324	8 541	263	274	1 878	2 052	6 708	6 763
LDCs	3 410	3 453	210	218	3	3	3 617	3 668

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**	**553**	**551**	**41**	**46**	**8 549**	**8 620**
Bangladesh	205	206	-	-	-	-	205	206
China	4 002	4 028	298	320	4	5	4 296	4 343
India	905	921	-	-	20	20	885	901
Iran, Islamic Republic of	290	300	4	3	-	-	294	303
Pakistan	455	456	-	-	11	13	444	443
Saudi Arabia	130	132	53	45	3	3	180	175
Turkey	325	330	1	1	-	-	326	331
AFRICA	**2 969**	**3 022**	**26**	**33**	**33**	**35**	**2 962**	**3 020**
Algeria	286	300	3	3	-	-	289	303
Nigeria	475	481	-	-	-	-	475	481
South Africa	175	173	5	9	-	1	179	180
Sudan	483	485	-	-	5	6	478	480
CENTRAL AMERICA	**129**	**131**	**21**	**20**	**-**	**-**	**150**	**150**
Mexico	99	100	12	10	-	-	111	110
SOUTH AMERICA	**331**	**338**	**9**	**9**	**26**	**31**	**314**	**315**
Brazil	115	117	9	9	-	-	124	126
NORTH AMERICA	**90**	**91**	**105**	**99**	**4**	**4**	**190**	**186**
United States of America	73	74	85	80	4	4	154	150
EUROPE	**1 285**	**1 299**	**184**	**171**	**39**	**42**	**1 430**	**1 428**
European Union	979	989	164	145	31	34	1 111	1 100
Russian Federation	192	194	10	9	-	-	202	203
OCEANIA	**1 047**	**981**	**27**	**28**	**832**	**801**	**242**	**207**
Australia	602	575	1	1	434	430	169	146
New Zealand	445	405	3	3	399	371	49	38
WORLD	**13 889**	**13 975**	**925**	**910**	**976**	**959**	**13 837**	**13 926**
Developing countries	10 685	10 821	606	606	100	111	11 191	11 316
Developed countries	3 204	3 155	318	304	876	848	2 646	2 610
LIFDCs	3 733	3 785	25	27	27	28	3 732	3 784
LDCs	1 859	1 879	6	6	5	6	1 859	1 879

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	**66 321**	**67 661**	**3 469**	**3 763**	**570**	**691**	**69 179**	**70 724**
China	55 467	56 749	1 349	1 473	441	560	56 325	57 637
of which Hong Kong, SAR	121	122	565	605	177	264	509	462
India	328	327	1	1	-	-	329	328
Indonesia	736	754	2	3	-	-	739	756
Japan	1 309	1 273	1 243	1 367	2	2	2 568	2 634
Korea, D.P.R.	113	114	3	3	-	-	116	117
Korea, Republic of	1 132	1 068	395	440	3	3	1 514	1 525
Malaysia	234	235	16	15	9	9	241	242
Philippines	1 730	1 781	122	116	3	3	1 849	1 894
Thailand	890	895	4	4	30	29	864	871
Viet Nam	3 226	3 284	111	110	25	25	3 312	3 369
AFRICA	**1 217**	**1 238**	**312**	**321**	**13**	**19**	**1 515**	**1 540**
Madagascar	56	57	-	-	-	-	56	57
Nigeria	250	255	1	1	-	-	251	256
South Africa	215	221	36	30	10	15	241	235
Uganda	114	112	-	1	-	-	114	112
CENTRAL AMERICA	**1 806**	**1 824**	**855**	**915**	**139**	**143**	**2 522**	**2 596**
Cuba	163	166	16	15	-	-	178	181
Mexico	1 281	1 285	682	737	121	125	1 842	1 897
SOUTH AMERICA	**5 301**	**5 489**	**208**	**208**	**814**	**810**	**4 694**	**4 887**
Argentina	370	406	18	14	1	1	387	419
Brazil	3 412	3 538	2	2	651	656	2 763	2 884
Chile	531	529	49	51	158	149	422	430
Colombia	240	239	60	68	-	-	300	307
Venezuela	168	170	22	16	-	-	190	186
NORTH AMERICA	**12 522**	**12 341**	**726**	**765**	**3 377**	**3 527**	**9 889**	**9 591**
Canada	1 992	2 008	246	238	1 205	1 193	1 048	1 060
United States of America	10 530	10 332	475	523	2 173	2 334	8 836	8 527
EUROPE	**26 843**	**27 061**	**1 314**	**1 036**	**2 443**	**2 322**	**25 714**	**25 774**
Belarus	476	413	96	40	119	90	453	363
European Union	22 050	22 094	17	16	2 288	2 193	19 779	19 917
Russian Federation	2 823	3 000	906	787	3	3	3 726	3 785
Serbia	252	252	20	22	9	12	263	262
Ukraine	748	809	195	90	8	7	934	892
OCEANIA	**506**	**511**	**249**	**246**	**35**	**36**	**723**	**717**
Australia	357	360	184	181	34	35	510	501
Papua New Guinea	78	80	8	8	-	-	86	88
WORLD	**114 516**	**116 125**	**7 132**	**7 254**	**7 392**	**7 548**	**114 236**	**115 830**
Developing countries	72 922	74 519	3 523	3 767	1 524	1 644	74 862	76 636
Developed countries	41 594	41 607	3 609	3 487	5 868	5 904	39 375	39 194
LIFDCs	3 233	3 302	298	292	7	7	3 524	3 587
LDCs	1 467	1 493	215	230	-	1	1 682	1 722

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	**37 839**	**37 587**	**7 059**	**7 234**	**2 617**	**2 770**	**42 314**	**42 048**
China	18 409	17 532	1 704	1 729	1 260	1 350	18 852	17 911
of which Hong Kong, SAR	29	29	988	1 057	631	670	386	416
India	2 454	2 651	-	-	6	7	2 448	2 644
Indonesia	1 791	1 809	1	2	-	-	1 792	1 811
Iran, Islamic Republic of	1 998	2 045	26	18	44	53	1 981	2 010
Japan	1 457	1 481	1 066	1 095	9	9	2 541	2 562
Korea, Republic of	716	735	146	154	34	25	833	866
Kuwait	42	45	131	125	1	-	172	170
Malaysia	1 361	1 383	46	48	32	31	1 375	1 400
Saudi Arabia	600	640	887	950	20	30	1 467	1 560
Singapore	97	99	145	145	12	10	230	233
Thailand	1 305	1 366	12	12	734	738	583	641
Turkey	1 790	1 841	374	370	373	409	1 791	1 802
Yemen	147	142	124	130	-	-	271	272
AFRICA	**4 981**	**5 048**	**1 740**	**1 820**	**35**	**53**	**6 686**	**6 815**
Angola	26	30	342	380	-	-	368	410
South Africa	1 516	1 536	390	400	25	43	1 881	1 894
CENTRAL AMERICA	**4 292**	**4 357**	**1 438**	**1 450**	**43**	**45**	**5 686**	**5 763**
Cuba	36	36	189	210	-	-	225	246
Mexico	2 875	2 930	848	842	10	11	3 713	3 762
SOUTH AMERICA	**18 224**	**18 686**	**415**	**434**	**4 482**	**4 657**	**14 157**	**14 462**
Argentina	1 749	1 767	4	3	363	370	1 390	1 399
Brazil	11 724	12 076	3	3	3 981	4 150	7 747	7 929
Chile	678	689	83	84	118	116	642	657
Venezuela	838	856	205	232	-	-	1 043	1 088
NORTH AMERICA	**21 465**	**21 857**	**343**	**343**	**4 341**	**4 256**	**17 476**	**17 955**
Canada	1 255	1 283	227	225	190	175	1 291	1 328
United States of America	20 210	20 574	111	113	4 150	4 081	16 180	16 622
EUROPE	**18 324**	**18 699**	**1 541**	**1 361**	**1 627**	**1 635**	**18 238**	**18 425**
European Union	12 841	12 984	725	727	1 331	1 310	12 235	12 400
Russian Federation	3 560	3 666	551	386	25	28	4 086	4 024
Ukraine	1 208	1 302	75	56	146	164	1 137	1 194
OCEANIA	**1 282**	**1 324**	**82**	**87**	**51**	**54**	**1 314**	**1 356**
Australia	1 081	1 116	13	15	37	40	1 056	1 090
New Zealand	175	182	1	1	13	15	163	168
WORLD	**106 407**	**107 557**	**12 620**	**12 729**	**13 195**	**13 471**	**105 871**	**106 822**
Developing countries	61 558	61 843	8 937	9 201	7 134	7 465	63 365	63 581
Developed countries	44 849	45 714	3 683	3 528	6 061	6 005	42 506	43 241
LIFDCs	5 496	5 774	1 161	1 185	20	23	6 636	6 937
LDCs	2 333	2 360	1 107	1 161	2	2	3 439	3 520