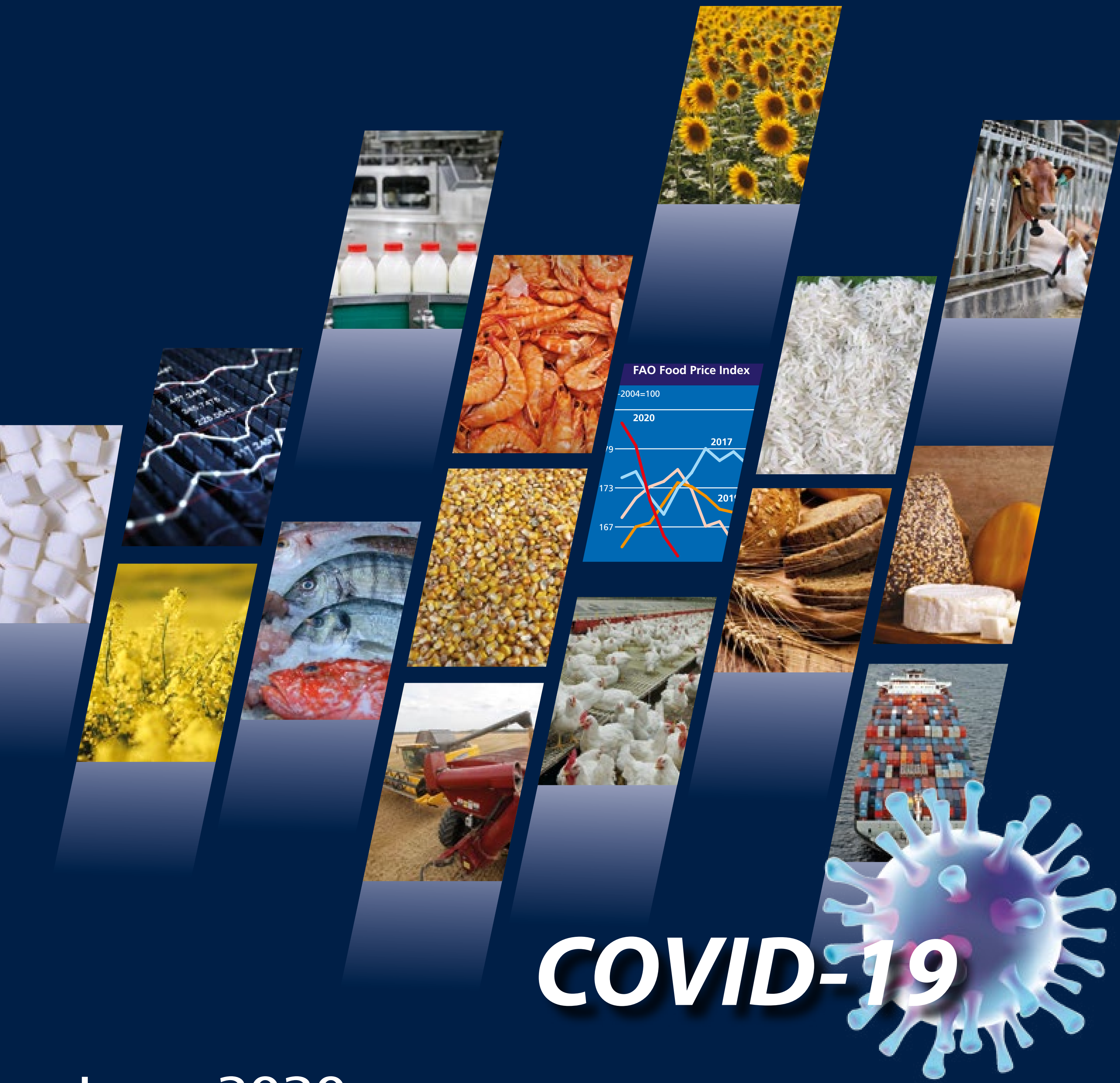
Food and Agriculture Organization of the United Nations

Food Outlook

BIANNUAL REPORT ON GLOBAL FOOD MARKETS



COVID-19

June 2020

MEAT AND MEAT PRODUCTS

World total meat production in 2020 is forecast to fall to 333 million tonnes (carcass weight equivalent), 1.7 percent lower than in 2019, marking the second year of consecutive decline. Much of the contraction is again expected to reflect a sharp drop in global production of pig meat, largely concentrated in Asian countries affected by the African swine fever (ASF) viral disease, but also of bovine meat, especially in the United States of America (USA) and Australia. By contrast, global production of poultry meat is forecast to expand, albeit at half the rate recorded last year. Modest output growth is also predicted for ovine meat. The pace of expansion of all the meat sectors has been negatively affected by COVID-19 market disruptions, aggravating the effects of animal diseases.

International meat trade is forecast to grow to 37 million tonnes in 2020, up 2.4 percent year-on-year, but considerably slower than the 6.8 percent registered in 2019, in large part reflecting a possible reduction in world meat consumption, consistent with expectations of widespread economic downturns. Logistical bottlenecks, limitations in shipping and port backlogs are also likely to restrain growth in world meat trade. China is anticipated to provide much of the trade momentum, as imports are seen rising by 24 percent year-on-year. The expected global rise in demand for meat imports is forecast to be met mainly through increased exports by Brazil, the USA, the European Union 27 member countries (EU) and the United Kingdom of Great Britain and Northern Ireland (the UK).

The combination of COVID-19-related economic hardships, logistical bottlenecks and a steep decline in demand from the food services sector due to lockdowns has led to a global slump in import demand, causing international meat prices, measured by the FAO Meat Price Index, to fall, with the sharpest drop registered for ovine meat, followed by poultry, pig and bovine meats. Plummeting food service sales have resulted in meat stock accumulation, especially premium categories, and in bulk packaging, enlarging export availabilities and weighing on international meat prices, despite a decline in meat output caused by labour shortages in slaughterhouses, processing and packing due to the pandemic.

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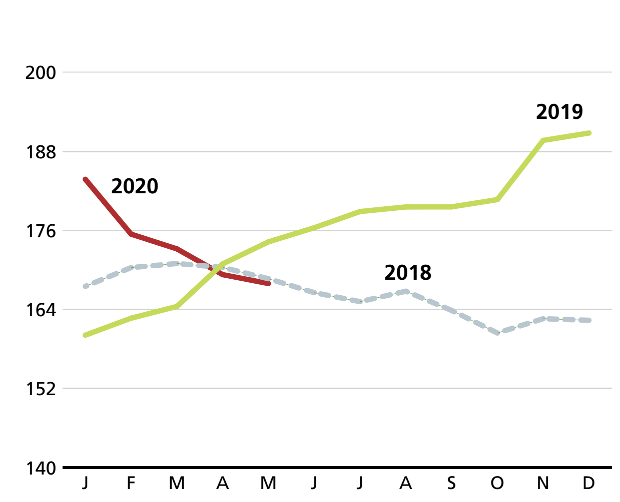
FAO INTERNATIONAL MEAT PRICE INDEX (2002-2004 = 100)



WORLD MEAT MARKET AT A GLANCE

	2018	2019 *estim.*	2020 *f'cast*	Change: 2020 over 2019
	million tonnes (carcass weight equivalent)			%
WORLD BALANCE				
Production	**342.2**	**338.9**	**333.0**	**-1.7**
Bovine meat	71.5	72.6	72.0	-0.8
Poultry meat	127.3	133.6	136.8	2.4
Pigmeat	120.9	109.8	101.0	-8.0
Ovine meat	15.8	16.0	16.2	0.9
Trade	**33.8**	**36.1**	**37.0**	**2.4**
Bovine meat	10.5	11.2	11.1	-1.0
Poultry meat	13.5	13.9	13.8	-0.3
Pigmeat	8.4	9.5	10.6	11.2
Ovine meat	1.0	1.0	1.0	-2.9
SUPPLY AND DEMAND INDICATORS				
Per caput food consumption:				
World (kg/year)	44.6	43.6	42.4	-2.8
Trade - share of prod. (%)	*9.9*	*10.7*	*11.1*	*4.2*

FAO MEAT PRICE INDEX (2002-2004=100)	2018	2019	2020 *Jan-May*	Change: Jan-May 2020 over Jan-May 2019 %
	166	176	174	4.5

MEAT AND MEAT PRODUCTS

PRICES

Excess supplies and trade disruptions weigh on international meat prices

International meat prices in May, measured by the FAO Meat Price Index, were down by 16 points (8.6 percent) from January 2020, with ovine meat registering the sharpest fall (-23.5 percent), followed by poultry meat (-11.8 percent), pig meat (-9.2 percent) and bovine meat (-4.1 percent). Since the beginning of the year, imports by China – the world's largest meat importer – have eased, reflecting high stocks of meat in cold storage that resulted from imports made in preparation for the Lunar New Year celebrations, subsequently cancelled due to the emerging coronavirus crisis, which drastically reduced meat consumption.

In key exporting countries, COVID-19 lockdowns and restrictions on movement led to loss of food service sales and substantial volumes of unsold meat products. While some were diverted to retail sales, the bulk, especially premium meat products and meat in large packaging, ended up in cold storage, where such facilities were available. Logistical bottlenecks, including delays in ports, reduced airfreight and container availability, and increased surveillance hampered foreign sales, adding to accumulated stocks. Meanwhile, economic hardships further reduced internal demand for meat products, adding to export availabilities, especially in countries where a large proportion of meat production is consumed domestically, for example, in Brazil and the United States

Figure 1. FAO monthly meat price index (2002-2004=100)

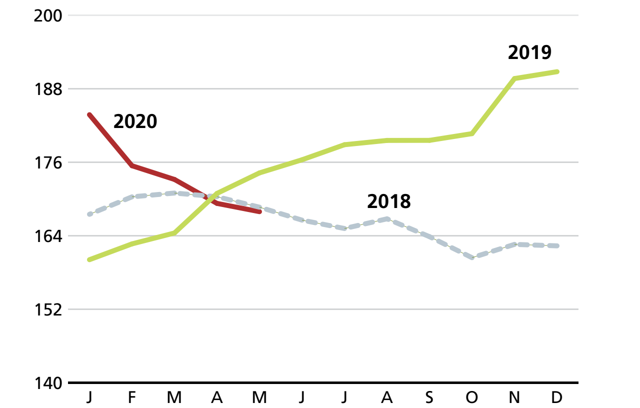


Figure 2. FAO monthly international price indices for bovine, ovine, pig and poultry meats (2002-2004=100)

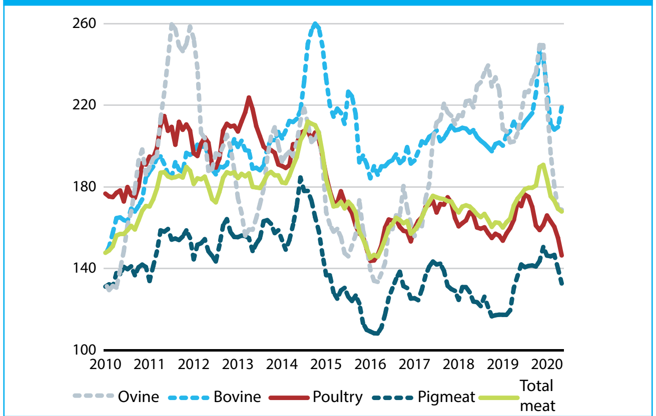


Table 1. World meat market at a glance

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	million tonnes (carcass weight equivalent)			%
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FAO MEAT PRICE INDEX (2002-2004=100)	**2018**	**2019**	**2020** *Jan-May*	**Change: Jan-May 2020 over Jan-May 2019 %**
	166	176	174	4.5

Table 2. The distribution of 2020 meat production and trade data (forecast) between the EU-27 and the UK (thousand tonnes, carcass weight equivalent)

		EU	EU-27	UK
Meat Total	Production	48 357	44 165	4 192
	Imports	1 386	1 697	2 568
	Exports	6 266	8 551	1 081
Bovine Meat	Production	7 839	6 930	909
	Imports	318	421	495
	Exports	433	910	176
Ovine Meat	Production	973	669	304
	Imports	107	139	54
	Exports	34	47	97
Pig Meat	Production	24 081	23 108	972
	Imports	20	181	978
	Exports	3 987	4 984	360
Poultry Meat	Production	14 900	12 904	1 996
	Imports	701	727	981
	Exports	1 777	2 527	432

Source: FAO, based on EUROSTAT and the United Kingdom and Northern Ireland official sources
Note: Total meat includes 'other meat types'

of America (the USA). Uncertainty surrounding the tourism sector in importing countries also restrained demand. The outcome was unusually high export availabilities, largely exceeding import demand and ultimately resulting in lower international meat prices.

Some sector-specific factors were also important in the current global meat price weakness. In the case of ovine meat, producers in Oceania were reported to have offloaded animals to benefit from still high prices, in anticipation of market disruptions due to the lockdowns, but this intensified the price decreases as more meat was added to export availabilities. Ovine prices were also affected a rise in domestic production in China, which dampened import demand. In the pig meat sector, hog supplies in the USA, the world's second largest pig meat exporter, surged in anticipation of rising demand from China, mostly adding to export availabilities, as trade frictions and market disruptions prevented greater expansion of exports. Prices in the poultry sector were also negatively influenced by the closure of fast food outlets and outmigration of large numbers of people from cities, where a significant proportion of poultry meat is sold.

OVERALL PRODUCTION AND TRADE

World meat output likely to contract for a second year

For the second year in a row, world meat output[1] is forecast to fall in 2020 to 333 million tonnes (in carcass weight equivalent), 1.7 percent less than in 2019. Much of the contraction would again reflect a sharp drop in global production of pig meat, largely concentrated in Asian countries affected by African swine fever (ASF), but also of bovine meat, especially in the USA and Australia. By contrast, global production of poultry meat is forecast to expand, although at half the rate recorded last year. Modest output growth is also predicted for ovine meat. The pace of expansion for all the meat sectors has been negatively affected by COVID-19 market disruptions, adding to the effects of animal diseases, especially ASF and Highly Pathogenic Avian Influenza (HPAI).

While the effects of ASF and other animal diseases are confined to the countries affected, COVID-19 is having widespread impacts on all types of meat. Social distancing measures have resulted in labour shortages in slaughterhouses, meat processing and packing plants, forcing some to shut down, creating disruptions through the whole supply chain and causing farmgate prices to plummet. In some countries or subregions with good pasture conditions, such as **Brazil**, or those in the early stages of herd rebuilding, such as **Australia** and **New Zealand**, farmers were able to manage cattle sales better. In more intensive ruminant production systems, such as

[1] In this chapter, the European Union 27 member countries (**EU**) and the United Kingdom of Great Britain and Northern Ireland (**UK**) are considered as one unit. Interested readers are referred to Table 2 in this chapter for a distribution of meat statistics between the **EU** and the **UK**.

large-scale feedlots in the **USA** and Eastern Europe, the disruptions caused by the pandemic appear to be greater.

As for meat demand, COVID-19 lockdowns, physical distancing and market closures resulted in substantially reduced food service sales (for example in restaurants, airline catering services, trains, universities, schools and day care centres), leading to excess supplies of meat, only partially offset by increased retail sales. The loss of food service sales was particularly severe in urbanized countries with high out-of-home consumption levels and large service sectors, particularly tourism. Although the surge in retail sales, driven by panic buying, temporarily boosted consumer meat prices, the job losses and economic hardships associated with the health crisis are eventually likely to result in curtailed meat purchases and consumption, a further accumulation of stocks and excess export availabilities. Meanwhile, logistical bottlenecks and port backlogs have been reported to be hindering trade flows, causing international meat prices to fall sharply.

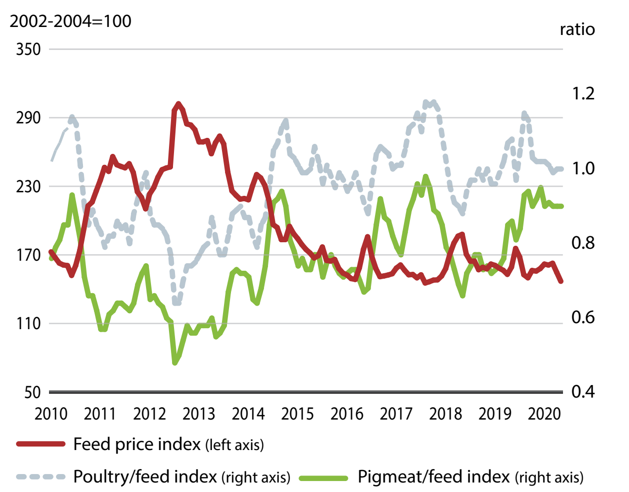
Declines in output are anticipated in key meat producing countries, including **China**, the **USA**, **Viet Nam**, **India, Australia**, the **Philippines** and **Turkey**, whereas moderate expansions are forecast in **Brazil**, the European Union 27 member countries (**EU**) and the United Kingdom of Great Britain and Northern Ireland (**UK**), the **Russian Federation** and **Mexico**.

China's imports remain the main driver of global meat trade in 2020

World trade in meat products is forecast to increase by 2.4 percent to 37 million tonnes in 2020, a significant slowdown from the 6.8 percent recorded in 2019. The increase would be entirely on account of pig meat, since trade in bovine, poultry and ovine meats are anticipated to stagnate or decline. **China** is again expected to be the principal engine of trade growth in 2020, with its imports surging by 24 percent. More modest increases are projected for **Canada**, **Japan**, **Singapore** and the **Philippines**, while the **USA**, the **Republic of Korea**, the **Russian Federation**, **South Africa**, **Viet Nam**, **Cuba** and **Saudi Arabia** are all anticipated to reduce their purchases. The expected global rise in import demand for meat is forecast to be met through increased exports by **Brazil**, the **USA**, the **EU** and the **UK**, **Canada**, **Mexico** and the **Russian Federation**.

In **Brazil**, meat sales to international markets are expected to grow by 6 percent this year, spurred by strong demand for bovine, pig and poultry meats from China and new accreditations of meat plants. Better compliance with strict Halal food requirements is likely to improve Brazil's access to meat markets in the Middle East. Sustained by a

Figure 3. FAO meat and feed price indices



brisk pace of shipments during the first quarter and large meat availabilities, exports from both **Canada** and the **USA** are anticipated to reach record highs this year, although less than originally expected, as prospects have been dampened by the COVID-19 market disruptions. Meat exports by the **EU** and the **UK** are also projected to rise, sustained by increased demand for pig meat from China. Likewise, shipments from the **Russian Federation** are likely to be greater than last year, stimulated by demand from neighbouring Kazakhstan, Ukraine and China.

POULTRY MEAT

Moderate expansion of output still feasible

World poultry meat output is forecast to reach 137 million tonnes in 2020, 2.4 percent more than in 2019 or half the pace of growth recorded last year. Increases are expected in **China**, the **EU** and the **UK, Brazil** and **Mexico,** while production is seen falling in **India**, **Thailand**, **Turkey** and the **USA**.

In **China**, poultry meat output is projected to expand, albeit slowly, supported by relatively firm demand, amid lingering high pig meat prices. Although the detection at the beginning of the year of new cases of HPAI in several European countries led China to prohibit imports of live birds from those origins, the effect on domestic production is likely to be limited, as the measure coincided with the lifting of a 2015 ban on live bird imports from the USA. New investments in processing facilities are expected to boost poultry production in the **EU** and the **UK** by 1.2 percent. However, the positive outlook could turn negative if recent price drops linked to COVID-19 continue. Bird slaughtering in those countries where new cases of HPAI have been diagnosed could also hamper EU production growth this year. In **Brazil**, poultry meat output is projected to rise in response to high import demand, especially from China, but also from other countries attracted by Brazil's status as an HPAI-free origin and improvements in the country's biosecurity standards. Poultry production is projected to rise in **South Africa** on high consumer demand, and in **Mexico**, on competitive feed costs and improved genetics.

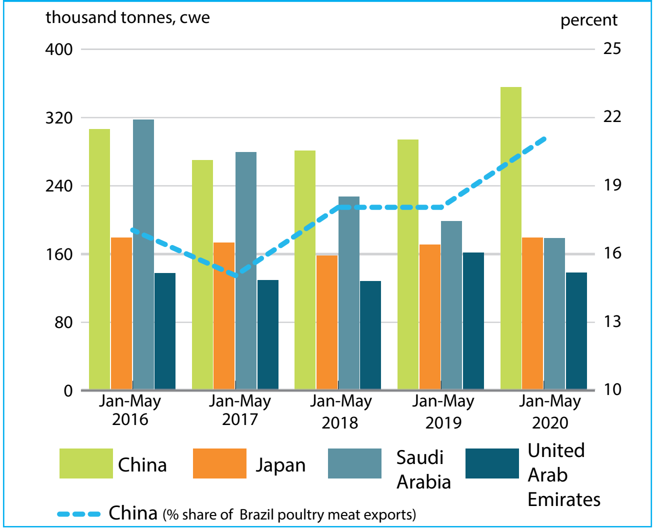
By contrast, poultry production in **India** is likely to fall as outmigration of the labour force from cities following the COVID-19 shutdown has reduced the availability of workers in the sector, also depressing consumer demand. Similarly, in **Thailand** a sharp drop in poultry meat demand by the food retail sector, including street foods, is behind an expected fall in production. However, the 2020 production outlook could turn positive if efforts being made by the Government to persuade Asian countries, especially China, Japan and the Republic of Korea, to import more poultry meat are successful. In the **USA**, tumbling food service sales and labour shortages have led the sector to scale down expansion plans and reduce the production share of large poultry birds preferred by food services. Requirements for maintaining workspace distances in processing plants are also reported to have reduced meat processing efficiency, contributing to a production decline.

Poultry meat trade likely to stagnate

World trade in poultry products is forecast to reach 14 million tonnes in 2020, slightly down (0.3 percent) from 2019, in contrast with the 2.9 percent growth registered in 2019. After four years of uninterrupted increases, this rather downbeat outlook would largely result from anticipated falling imports by major country buyers, including **South Africa**, **Cuba** and **Saudi Arabia**, virtually all compensated by expected larger purchases by **China**, **Mexico** and **Japan**. Imports by **China** are currently projected to grow by 17 percent in 2020, which compares with a 25 percent rise last year, on sustained consumer demand. **Mexico**'s purchases, mostly from the USA, are also likely to be stimulated by lively internal demand from consumers and the food processing industry, although falling crude oil revenues, economic slowdown and rising unemployment may keep import growth under check. Poultry deliveries to **Japan** are also predicted to end higher, despite the possible introduction of import limitations to protect the country's poultry flock from the HPAI virus.

The anticipated stagnation in global poultry meat imports is likely to have a negative effect on a number of traditional exporters, especially **Thailand**, **Turkey** and **Argentina**. On the other hand, the **USA**, **Brazil** and **Belarus** are likely to see their poultry meat exports grow.

Figure 4. Brazil's poultry meat exports by major destinations



BOVINE MEAT

Six among the major producers to face contractions

World bovine meat production is forecast to dip by 0.8 percent to 72 million tonnes in 2020, putting an end to five years of continuous growth. This rather frail outlook principally reflects projected contractions in six of the world's leading bovine meat producers, namely the **USA**, **Australia**, **India**, **South Africa**, the **EU** and the **UK** and **New Zealand**, which will outweigh projected expansions elsewhere, particularly in **China** and **Brazil**. Most of the countries facing negative production prospects have suffered important COVID-related market disruptions. Limited availability of cattle due to high demand for herd rebuilding, as in Oceania, is also expected to contribute to the declines.

In the **USA**, bovine meat output expanded in the first quarter of the year, but the country is predicted to conclude 2020 with a 5 percent overall contraction, as labour shortages in meat processing are disrupting upstream activities, including slaughtering. Although the newly approved farm assistance package, coupled with efforts to sustain meat processing activities, may limit the downfall, the measures are unlikely to be sufficient to counter the contraction in domestic and external meat demand and falling prices. Indeed, the economic slowdown is expected to curb direct meat purchases by consumers, while the lockdowns and physical distancing requirements are also causing food service sales to plunge. In the **EU** and the **UK**, the projected contraction in bovine meat output stems from the continued decline in herd numbers, only partly compensated by higher carcass weights. Even though assistance to producers has been granted for storing meat in an attempt to stabilize prices, the COVID-related market disruptions are further depressing production. In particular, loss of retail sales has negatively affected the market for premium beef products and veal. In **Australia** and **New Zealand,** bovine meat outputs are forecast to fall, as cattle available for slaughter has been limited by large drought-induced offtakes last year, which brought herd numbers to historic lows. Moreover, good rains in recent months have fostered a retention of animals for restocking, which is likely to further limit cattle supplies in the months to come. Since demand for beef from foreign markets has contracted, incentives to slaughter may weaken further. In **India**, bovine output is set to fall due to the imposed lockdown, especially as the collection of animals usually takes the form of house-to-house visits. With much of the output destined for external markets, the economic slowdown in a large number of countries could further undermine the Indian bovine meat sector. **South Africa**'s cattle supplies have dwindled with the entry into a restocking period, which is constraining production.

By contrast, bovine meat output in **China** is projected to expand, underpinned by rising cattle herds, especially on large-scale farms, and robust internal demand aimed at compensating for the continuing pig meat shortfall. In **Brazil**, the projected expansion in bovine output reflects large cattle numbers and rising carcass weights sustained by favourable weather and pasture growth, along with competitive feed costs.

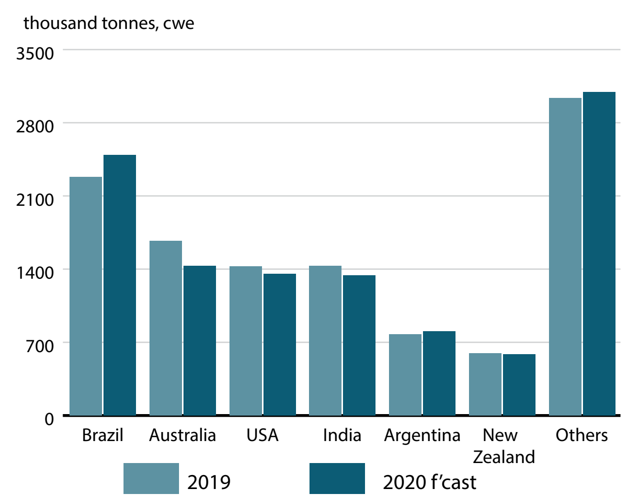
Limited supplies for export and low import demand for poor trade prospects

World bovine meat exports are forecast to hover around 11 million tonnes in 2020, 1 percent down from last year, in sharp contrast to the 7.3 percent growth registered in 2019. The global contraction is anticipated to be driven by lower imports by **Viet Nam**, the **USA**, the **Russian Federation**, **Mexico**, the **Philippines** and the **Republic of Korea**, more than outweighing foreseen increased purchases by **China** and **Japan**. Import growth is anticipated to weaken in almost all other bovine meat markets, as widespread economic downturn curtail consumption in middle- and low-income households, while lockdowns and physical distancing reduce restaurant turnovers, eroding demand for premium meat products.

In **China**, bovine meat imports have risen in recent years to compensate for the continued shortfall in local pig meat supplies. Importation has been facilitated by new accreditations granted to meat packing plants in Brazil, Argentina and Uruguay, and by new supply agreements reached with the EU and the UK, the Russian Federation, South Africa, Belarus, Namibia and Japan. The USA-China trade agreement may bolster imports too, but the pandemic may affect this. Beef purchases by **Japan** are also expected to grow to some extent.

On the export side, much of the expected contraction in world exports reflects anticipated smaller sales by **Australia**, **India**, the **USA** and **New Zealand**. In **Australia** and **New Zealand**. The decline would largely reflect limited exportable supplies, but also weaker demand from foreign markets. In **India**, exports may shrink by 6 percent, as production stalls. In the **USA,** despite a good performance in the first few months, beef bovine meat deliveries in 2020 are projected to fall from last year due to meat processing constraints. By contrast, **Brazil**, **Argentina** and **Canada** seem to be in a position to export more this year, as demand from their traditional trading partners remains sustained.

Figure 5. Bovine meat exports by major exporters



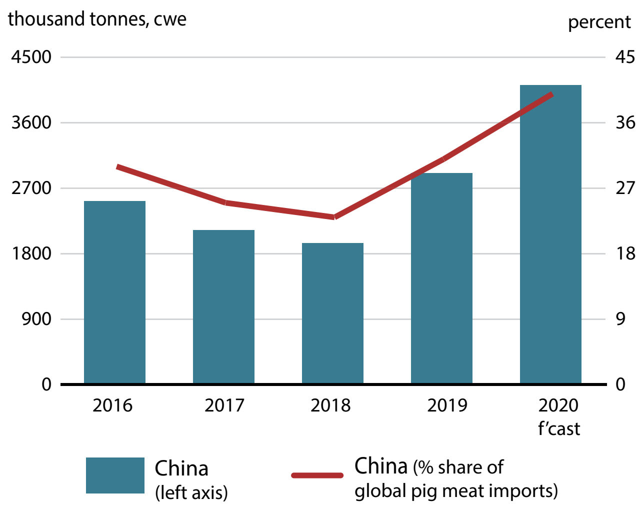
PIG MEAT

African swine fever to depress global pig meat production again this year

For the second year in a row, world pig meat output is forecast to record a sharp contraction, falling to 101 million tonnes in 2020, or 8.0 percent less than in the previous year. Much of the global decline would be on account of **China**, but also **Viet Nam**, the **Philippines** and the **USA**. In **China**, the spread of ASF is largely behind a predicted 20 percent fall in pig meat output to 35 million tonnes, following on from the 21 percent retreat already recorded in 2019. With a string of policies launched by the Government to rescue the sector, pig farming enterprises are reported to have adopted advanced biosecurity measures. ASF outbreaks are also behind projected output falls in **Viet Nam** and the **Philippines,** whereas a smaller pig herd is forecast to bring output down in **Ukraine**. In the **USA,** the negative production outlook is mainly linked to COVID-19 market disruptions.

By contrast, moderate output increases are anticipated in the **EU** and the **UK**, **Brazil**, the **Russian Federation**, **Mexico** and **Canada**. In the **EU** and the **UK**, strong import demand, especially from China, is supporting an expansion of the sector. In **Brazil**, stable feed costs and large pig herd numbers are sustaining production, while in the **Russian Federation** output growth is underpinned by large-scale investments in new breeding and processing facilities.

Figure 6. China's pig meat imports



Trade continues to be fuelled by rising imports in Asia

World pig meat exports are forecast at 10.6 million tonnes in 2020, up 11.2 percent from last year, predominantly driven by larger anticipated imports by **China**, along with expected moderate increases in purchases by **Viet Nam**, the **Philippines**, **Chile** and **Ukraine**. In **China**, pig meat imports are expected to rise by 1.2 million tonnes or 42 percent in 2020, to reach 4.1 million tonnes, equivalent to 40 percent of the global volume of trade in pig meat. Likewise, imports by the **Philippines** and **Viet Nam** are projected to rise mainly to compensate for the production shortfalls caused by the ASF disease. Limited domestic supplies are also expected to increase imports by **Ukraine**. By contrast, the **Republic of Korea** is forecast to reduce its pig meat purchases due to a contraction in domestic food service sales.

Much of the expanded world pig meat imports in 2020 are anticipated to be met by the **USA,** the **EU** and the **UK, Brazil, Canada, Mexico** and **Chile.** Despite the anticipated small production contraction, the **USA** will likely see its exports surge by 13 percent, with the bulk directed to China, Mexico, Japan, Canada, the Republic of Korea and Australia. In the **EU** and the **UK**, increased availabilities have resulted from falling domestic pig meat consumption and rising production, which may lead to larger exports, especially to China, in the wake of newly signed agreements between China and key EU suppliers. **Brazil**'s pig meat exports could also rise, due to increased deliveries to China, although sales to other trading partners may fall.

OVINE MEAT

Production growth to concentrate in China

World ovine meat output is forecast to expand by nearly 1 percent in 2020, to 16 million tonnes. Most of the increase is anticipated to be concentrated in China, with some modest growth also foreseen in Africa. By contrast, output in Oceania, which accounts for 80 percent of global trade, is forecast to drop, possibly for a fifth year since 2013, due to limited animal supplies and high restock demand, amid favourable weather. In **China**, production is forecast to register a 2.3 percent increase, capitalizing on the previous year's expansion of sheep and goat flocks, when high prices attracted more herders into the sector. Following strong growth in 2019, ovine meat output in the **EU** and the **UK** is set to stagnate with limited availability of animals.

Trade likely to contract amid tight supplies

World trade in ovine meat is forecast to contract by nearly 3.0 percent in 2020, to just over 1 million tonnes, with more than 80 percent of exports coming from Australia and New Zealand. In Oceania, supply is anticipated to be tight, especially in the coming months, but the extent of export availabilities will be contingent on rainfall and other weather-related parameters, which determine the retention of animals. World import demand is likely to be robust, especially with continued meat deficit in **China** and preference for sheep meat supplies from Oceania, but the extent of growth is uncertain, especially as China is holding large volumes of ovine meat in cold storage, imported towards the end of 2019 in preparation for the Lunar New Year celebrations. With the loss of restaurant sales, much of those supplies remain unsold, possibly containing import demand in the rest of the year.

MEAT: MAJOR POLICY DEVELOPMENTS MID-OCTOBER 2019 TO MID-MAY 2020*

COUNTRY	DATE	PRODUCT	POLICY INSTRUMENT	DESCRIPTION
Algeria	Feb-20	Bovine meat	Market access	Signed an agreement with Ireland's Department of Agriculture, allowing exports of cattle for breeding and fattening from Ireland.
Argentina	Dec-19	Bovine meat	Export duty	Issued a decree raising bovine meat export taxes from 7 to 9 percent.
Australia	Apr-20	All	Government support	Announced a temporary measure to help restore critical global supply chains that have been impacted by COVID-19 containment measures around the world. Called the International Freight Assistance Mechanism (IFAM), it is worth AUD 110 million (around USD 69 million). The IFAM helps producers of high-value agricultural and fisheries products, including premium red meat (bovine, sheep and pig meats), to resume servicing supply contracts with their international customers.
Canada	May-20	All	Government support	Announced the allocation of CAD 252 million (USD 179.5 million) to assist Canadian farmers and food processors to cover losses from reduced demand due to COVID-19 lockdowns. Bovine and pig meat producers, who have been forced to keep livestock on farms longer due to processing shutdowns, will receive CAD 125 million (USD 89 million) in disaster relief funding.
China (mainland)	Oct-19	Bovine meat	Market access	Granted approval for full access of bovine meat exports from the United Kingdom of Great Britain and Northern Ireland (UK), following a protocol agreement signed by the two countries in June 2019. The ban was imposed in 1996, following a Bovine Spongiform Encephalopathy (BSE) outbreak.
	Oct-19	Bovine meat	Market access	Approved imports from 14 more Irish bovine meat plants, taking the total number of authorized units to 21.
	Oct-19	Poultry meat	Import ban lifted	Lifted a ban, which existed since 2016, on imports of poultry and poultry products from Spain and Slovakia, after determining that highly pathogenic avian influenza (HPAI) was no longer present in those countries.
	Nov-19	All	Import ban lifted	Lifted the suspension on imports of pig and bovine meats from Canada, which was imposed in June 2019 when Chinese authorities found consignments containing the feed additive ractopamine. The suspension was later extended to all imports of Canadian bovine and pig meats.
	Nov-19	Pig meat	Market access	Granted approval to 7 additional meat plants in Brazil to export pig offal. This is in addition to the 25 Brazilian meatpacking plants that had already been granted approval for exporting bovine, pig and poultry meats to China.
	Nov-19	Poultry meat	Import ban lifted	Lifted the ban on poultry meat imports from the United States of America (the USA), recognizing that it no longer poses a risk of HPAI.
	Nov-19	Bovine meat	Market access	Authorized imports of frozen bovine meat from Ukraine for the first time.
	Dec-19	Pig meat	Import ban	Banned imports of pig meat, wild boar and related products from Indonesia due to African Swine Fever (ASF) outbreaks.
	Dec-19	All	Import ban lifted	Lifted a ban on deboned bovine meat from Japanese cows under 30 months, ending a restriction in place since 2001, after accepting that it no longer poses a risk from BSE. China also lifted restrictions related to foot-and-mouth disease (FMD) that had existed since 2010.
	Dec-19	Pig meat	Import tariff	Announced import tariff reductions for 850 products, including frozen pig meat. Rates on two tariff lines (02032220 and 02032900) would be reduced from 12 to 8 percent.
	Jan-20	Poultry meat	Market access	Authorized poultry meat imports from 11 Russian establishments, bringing the total to 40 processors who are now eligible to supply the Chinese market.
	Feb-20	Poultry meat	Import ban	Announced a ban on imports of poultry meat from Germany, Hungary, Slovenia and Ukraine due to reported cases of HPAI outbreaks.

COUNTRY	DATE	PRODUCT	POLICY INSTRUMENT	DESCRIPTION
China (mainland)	Feb-20	All	Import ban	Introduced a new classification of animals and poultry birds for human consumption, with provisions for banning illegal trading in wild animals. Formation of the list of animals deemed suitable for human consumption is based on several principles: 1) long period of domestication; 2) requirements under food security, safety, public health and ecosystem sustainability; and 3) compliance with international conventions.
	Feb-20	Ovine meat	Market access	Approved all necessary sanitary protocols and product approvals for Argentina to export sheep meat and by-products from Argentina's Patagonia region.
	Feb-20	All	Import tariff	Granted exemption on 696 US products, including bovine and pig meat products, under the ''Phase 1 trade deal" signed with the USA in January and made effective from February 2020.
	Mar-20	Pig meat	State market intervention	Released 270 000 tonnes of pig meat from government reserves to stabilize pig meat prices, which had been affected by the spread of ASF.
	Apr-20	Pig meat	Market access	Granted approval for 8 more suppliers in Spain to export pig meat to China, raising the total number of approved establishments to 57.
	May-20	Bovine meat	Import ban	Suspended bovine meat imports from 4 Australian abattoirs. The suspended units together account for about 35 percent of Australian bovine meat exports to China.
	May-20	Poultry meat	Import ban	Suspended imports of poultry meat from the Skopje region of North Macedonia due to an outbreak of Newcastle Disease.
Egypt	Apr-20	Bovine meat	Import policy	Extended the shelf-life validity period for imported frozen bovine meat liver from 7 to 10 months.
	Apr-20	All	Market access	Authorized 42 meat plants (27 poultry and 15 bovine meat) to import meat from Brazil.
European Union**	Mar-20	Poultry meat	Import ban lifted	Lifted a ban on imports of Ukrainian poultry meat, which was imposed after a reported outbreak of HPAI in January.
	Apr-20	All	Government support	Announced a plan to open Private Storage Aid (PSA) for bovine meat and lamb to help curb the impacts of COVID-19. For bovine meat, eligibility is restricted to products under code 02012050 (separated hindquarters: the rear part of the half-carcass, comprising all the bones and the thigh and sirloin, including the fillet but with or without the shank and thin flank). The PSA offers the option to store the meat for 90, 120 or 150 days. Under the proposal, applicants would receive EUR 1 008 (around USD 1 098) per tonne if storing the meat for 90 days, EUR 1 033 (around USD 1 125) per tonne for 120 days and EUR 1 058 (USD around 1 153) per tonne for 150 days.
	Apr-20	All	Government support	Announced a EUR 100 billion (around USD 109 billion) loan package to curb COVID-19 pandemic effects on the economy. It also included flexibility and simplification of some Common Agricultural Policy (CAP) instruments to support farmers, specifically through: 1) an extension of deadline for CAP payment applications from 15 May to 15 June 2020, offering more time for farmers to fill in their applications for both direct payments and rural development payments; 2) offering higher advances of payments, with direct payments from 50 to 70 percent and rural development payments from 75 to 85 percent, to increase cash flow for farmers. Farmers will start receiving these advances from mid-October 2020.
Hong Kong SAR of China	Nov-19	Poultry meat	Market access	Authorized poultry meat imports from the Russian Federation.
Indonesia	Feb-20	All	Import ban	Imposed a temporary ban on imports of live animals from China due to coronavirus concerns.
	Apr-20	Bovine meat	Market access	Issued permits to two state enterprises to import 20 000 tonnes of bovine meat from Brazil or Argentina.

COUNTRY	DATE	PRODUCT	POLICY INSTRUMENT	DESCRIPTION
Japan	Nov-19	Bovine meat	Import ban lifted	Announced the resumption of bovine meat imports from Spain for the first time in almost 20 years. The ban was first imposed in 1996 after an outbreak of BSE.
	Jan-20	Bovine meat	Trade agreement	Enforced the new tariff on US bovine meat according to the US-Japan trade agreement signed in September 2019 and approved in December 2019. Japan will gradually lower the tariff on US bovine meat from 38.5 to 9 percent, making tariff rates on US bovine meat equivalent to the revised tariff rates applicable for the 11 nations in the Trans-Pacific Partnership agreement.
	Apr-20	Bovine meat	Government support	Announced details of the government budgetary allocation of USD 875 million, part of Japan's COVID-19 supplementary budget, to the Agriculture and Livestock Industries Corporation (ALIC), a state-trading enterprise. The funding for the meat sector will be allocated under three programmes: 1) support for Wagyu Storage and Sales; 2) support for Beef Calf Operators; and 3) support to stabilize demand and supply of cattle/swine hides.
Republic of Korea	Nov-19	Bovine meat	Market access	Issued export certificates for Denmark to supply bovine meat from cattle below 30 months, after nearly two decades.
Kuwait	Nov-19	Poultry meat	Import ban lifted	Lifted a ban on importing poultry meat and meat products, including fresh, chilled, frozen and processed, from the Islamic Republic of Iran and India due to the ending of HPAI.
	Feb-20	Bovine meat	Import ban lifted	Resumed imports of Brazilian bovine meat after 7 years. The ban was first imposed due to the detection of an atypical case of BSE.
	Apr-20	Poultry meat	Import ban lifted	Lifted a ban on poultry meat imports from Poland, imposed in late January 2020 in the wake of HPAI outbreaks.
Malaysia	Dec-19	Pig meat	Import ban	Imposed a ban on imports of pig meat from Indonesia due to a reported outbreak of ASF.
Mexico	May-20	Pig meat	Market access	Authorized imports of pig meat from Ireland, approving 5 processing plants and 5 cold stores.
Namibia	Feb-20	Bovine meat	Market access	Became the first African country to export bovine meat to the USA.
	Apr-20	Poultry meat	Import ban	Suspended imports and the in-transit movement of poultry and poultry meat products from Hungary, Poland, Ukraine and South Carolina (USA), following outbreaks of HPAI.
Oman	Mar-20	All	Market access	Approved imports of meat, principally poultry meat, from 15 Brazilian plants.
Poland	Jan-20	Poultry meat	Export ban	Halted poultry meat exports to Cuba, Japan, Republic of Korea, the Philippines and South Africa, due to a ban imposed by these countries, at different times, following outbreaks of avian flu.
Peru	Dec-19	Pig meat	Import ban	Announced a ban on imports of pig meat from countries affected by ASF.
	Apr-20	All	Market access	Approved imports from 8 Brazilian meatpackers, signalling new market access opportunities in Latin America.
Philippines	Feb-20	All	Import policy	Suspended imports of poultry meat from of Czech Republic due to concerns over outbreaks of HPAI, while resuming pig meat imports from the same country, lifting the earlier imposed ban due to reported outbreaks of ASF.
	Mar-20	Poultry meat	Import ban	Imposed a ban on poultry meat imports from Germany following an outbreak of HPAI in the European country.
Russian Federation	Nov-19	Bovine meat	Import ban lifted	Removed restrictions on imports of bovine meat products from two plants in Brazil. The restrictions were imposed in December 2017 after finding ractopamine, an additive that is banned in the Russian Federation, in some imported consignments.
	Dec-19	Bovine meat	Import ban	Imposed restrictions on bovine meat imports from 7 plants in Argentina and Paraguay due to ractopamine, a food additive that is banned in the Russian Federation, found in some shipments.
	Dec-19	Bovine meat	Market access	Announced the receipt of veterinary certificates to export bovine meat to Morocco.
	Jan-20	Bovine meat	Market access	Received authorization from China to export bovine meat from two producers for deliveries.

COUNTRY	DATE	PRODUCT	POLICY INSTRUMENT	DESCRIPTION
Saudi Arabia	Oct-19	Poultry meat	Import ban lifted	Lifted a ban on imports of hatching eggs and day-old-chicks from several countries, including Denmark, Italy, Japan, the Republic of Korea, Lao People's Democratic Republic, Malaysia, the Russian Federation and the county of Lincolnshire (UK), as these countries have been free from HPAI outbreaks for at least three months.
	Nov-19	Bovine meat	Market access	Approved imports of bovine meat from 8 Brazilian meatpackers.
	Nov-19	Bovine meat	Market access	Reopened its market to bovine meat from Poland, while also allowing imports from Colombia for the first time.
	Jan-20	Poultry meat	Import ban lifted	Lifted a ban on Ukrainian poultry meat, imposed in September 2019 due to reported outbreaks of HPAI.
	Feb-20	All	Market access	Approved bovine and ovine meat imports from Uruguay and Paraguay.
	Feb-20	Poultry meat	Import ban	Suspended imports from two Brazilian poultry plants due to concerns over quality control.
Singapore	Nov-20	Pig meat	Import ban	Lifted a ban on Belgian pig meat imports after agreeing to recognize regionalization measures designed to limit pig meat imports only from regions affected by ASF.
Sri Lanka	Mar-20	All	Import ban	Issued a notice to importers, restricting the import of live animals, animal products, and animal by-products in an attempt to reduce the spread of COVID-19.
South Africa	Mar-20	Poultry meat	Import tariff	Announced a rise in import tariffs on poultry meat from countries not covered by existing trade agreements. Under the new rules, tariffs will be increased for bone-in poultry meat portion from 37 percent to 62 percent, for boneless portion from 12 percent to 42 percent.
	Apr-20	Poultry meat	Import ban	Banned imports of poultry meat from South Carolina (USA) due to a reported outbreak of HPAI.
Taiwan province of China	Feb-20	Pig meat	Import ban	Imposed a ban on pig meat imports from Italy following the Italian suspension of flights between the two countries in response to the coronavirus outbreak.
Ukraine	Feb-20	Poultry meat	Export ban	Halted poultry meat exports to Armenia, Azerbaijan, Iraq, Japan, the Republic of Korea, Kuwait Republic of Moldova, Morocco, the Philippines, Saudi Arabia, Singapore and Tunisia, to import bans imposed by the mentioned countries, at different times, following an outbreak HPAI.
	Apr-20	Poultry meat	State market intervention	Introduced state regulation for prices for 20 products, including poultry meat, until the end of the emergency regime.
United States of America	Feb-20	Bovine meat	Import ban lifted	Lifted a ban on Brazilian fresh bovine meat imports, imposed in June 2017 when some shipments from Brazil failed to pass food safety checks.
	Mar-20	All	Trade agreement	Announced a regionalization agreement with China, which implies that the Asian country will only block imports from disease-affected regions.
	Mar-20	Bovine meat	Market access	Announced an agreement on equivalence of standards on the UK's disease control measures, following an inspection, which will allow bovine meat imports from the UK.
	Apr-20	All	Government support	Launched the Coronavirus Food Assistance Program (CFAP) under the United States Department of Agriculture, aiming to assist farmers, ranchers and consumers in response to the COVID-19 outbreak. The budget allocation was set at USD 19 billion. The programme includes two major components: 1) Direct support to farmers and ranchers, worth USD 16 billion to assist agricultural producers where prices and market supply chains have been impacted; and 2): USDA Purchase and Distribution, to purchase USD 3 billion worth of fresh produce, dairy and meat and redistribute them through food banks, community and faith organizations and other organizations serving Americans in need.
Viet Nam	Dec-19	Pig meat	Market access	Authorized imports of pig meat from two Russian meat companies.

* 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

** From 31 January 2020: EU-27

APPENDIX TABLE 14: **TOTAL MEAT STATISTICS**
(*thousand tonnes - carcass weight equivalent*)

	Production		Imports		Exports		Utilization	
	2019 *estim.*	2020 *f'cast*	2019 *estim.*	2020 *f'cast*	2019 *estim.*	2020 *f'cast*	2019 *estim.*	2020 *f'cast*
ASIA	**136 354**	**130 245**	**19 599**	**21 109**	**4 675**	**4 387**	**151 200**	**146 876**
China	80 340	75 069	7 496	9 325	603	531	87 233	83 863
India	7 747	7 340	2	2	1 451	1 360	6 297	5 983
Indonesia	3 696	3 760	259	254	6	6	3 948	4 008
Iran, Islamic Republic of	3 141	3 186	151	119	53	51	3 239	3 254
Japan	4 074	4 082	3 726	3 741	18	20	7 724	7 805
Korea, Republic of	2 568	2 570	1 490	1 388	59	63	3 941	3 895
Malaysia	2 136	2 158	321	304	70	70	2 386	2 391
Pakistan	3 999	4 129	3	3	62	65	3 941	4 066
Philippines	3 694	3 612	624	630	7	9	4 311	4 233
Saudi Arabia	781	792	827	776	87	88	1 521	1 480
Singapore	124	125	362	372	35	35	451	463
Thailand	3 012	2 772	29	27	1 371	1 276	1 709	1 431
Turkey	3 687	3 634	8	7	535	493	3 161	3 147
Viet Nam	4 845	4 408	979	917	19	19	5 805	5 306
AFRICA	**20 518**	**20 718**	**2 941**	**2 787**	**266**	**275**	**23 193**	**23 230**
Algeria	810	812	68	62	2	2	877	873
Angola	265	266	518	486	-	-	784	751
Egypt	2 210	2 211	353	314	4	4	2 558	2 521
Nigeria	1 449	1 448	3	3	1	1	1 451	1 451
South Africa	3 309	3 320	600	536	135	141	3 775	3 715
CENTRAL AMERICA & THE CARIBBEAN	**10 455**	**10 641**	**3 600**	**3 470**	**836**	**881**	**13 220**	**13 230**
Cuba	352	353	368	309	-	-	720	662
Mexico	7 314	7 473	2 288	2 250	567	612	9 035	9 111
SOUTH AMERICA	**47 147**	**47 599**	**1 236**	**1 201**	**9 814**	**10 312**	**38 569**	**38 486**
Argentina	6 114	6 137	63	56	1 072	1 088	5 105	5 106
Brazil	30 244	30 627	54	50	7 493	7 957	22 805	22 719
Chile	1 517	1 524	607	611	432	457	1 693	1 678
Colombia	2 805	2 823	268	243	25	32	3 048	3 035
Uruguay	627	615	103	97	438	433	292	279
NORTHERN AMERICA	**53 375**	**52 665**	**2 885**	**2 758**	**9 944**	**10 435**	**46 243**	**44 960**
Canada	5 113	5 171	731	755	1 991	2 110	3 850	3 834
United States of America	48 262	47 493	2 141	1 989	7 953	8 325	42 379	41 111
EUROPE	**64 309**	**64 798**	**2 937**	**2 784**	**7 265**	**7 658**	**59 974**	**59 924**
Belarus	1 169	1 188	63	62	412	429	819	821
European Union	48 053	48 357	1 405	1 386	5 907	6 266	43 551	43 477
Russian Federation	10 849	11 034	778	679	387	417	11 233	11 295
Ukraine	2 490	2 460	171	149	464	454	2 197	2 155
OCEANIA	**6 709**	**6 311**	**566**	**544**	**3 315**	**3 037**	**3 961**	**3 818**
Australia	4 647	4 287	297	274	2 277	2 014	2 667	2 548
New Zealand	1 481	1 441	86	85	1 034	1 019	533	506
WORLD	**338 867**	**332 977**	**33 765**	**34 652**	**36 115**	**36 985**	**336 360**	**330 525**
LIFDC	27 096	26 439	2 428	2 343	1 674	1 583	27 850	27 199
LDC	14 278	14 405	1 576	1 527	40	40	15 814	15 892

[1] including "other meat"

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

	Production		Imports		Exports		Utilization	
	2019 *estim.*	**2020** *f'cast*	**2019** *estim.*	**2020** *f'cast*	**2019** *estim.*	**2020** *f'cast*	**2019** *estim.*	**2020** *f'cast*
ASIA	**50 809**	**53 538**	**6 611**	**6 789**	**2 509**	**2 320**	**54 936**	**57 922**
China	23 516	26 414	1 415	1 653	441	388	24 490	27 679
India	3 873	3 563	-	-	6	5	3 868	3 558
Indonesia	2 689	2 764	-	-	2	2	2 687	2 762
Iran, Islamic Republic of	2 233	2 276	1	1	48	45	2 186	2 231
Japan	2 318	2 320	1 331	1 341	10	10	3 636	3 659
Korea, Republic of	912	924	204	195	52	56	1 053	1 063
Kuwait	65	68	143	137	9	10	198	196
Malaysia	1 895	1 918	73	73	56	56	1 913	1 935
Saudi Arabia	570	578	618	591	47	49	1 140	1 120
Singapore	105	105	180	184	18	18	267	271
Thailand	1 853	1 629	3	2	1 212	1 115	682	424
Turkey	2 209	2 145	1	1	498	455	1 712	1 691
AFRICA	**6 189**	**6 275**	**1 925**	**1 847**	**106**	**109**	**8 008**	**8 013**
Angola	28	28	255	260	-	-	283	288
South Africa	1 822	1 891	540	482	57	55	2 305	2 318
CENTRAL AMERICA & THE CARIBBEAN	**5 215**	**5 314**	**1 844**	**1 797**	**41**	**40**	**7 019**	**7 071**
Cuba	25	23	295	238	-	-	320	262
Mexico	3 488	3 564	1 040	1 059	11	11	4 517	4 612
SOUTH AMERICA	**23 790**	**23 889**	**375**	**331**	**4 593**	**4 631**	**19 572**	**19 589**
Argentina	2 221	2 225	5	5	265	249	1 961	1 982
Brazil	15 885	15 980	5	3	4 133	4 202	11 758	11 781
Chile	765	753	139	122	180	165	724	711
NORTHERN AMERICA	**24 480**	**24 450**	**350**	**343**	**3 934**	**4 020**	**20 853**	**20 810**
Canada	1 512	1 529	197	200	166	167	1 542	1 557
United States of America	22 967	22 921	147	137	3 769	3 853	19 304	19 247
EUROPE	**21 568**	**21 813**	**1 297**	**1 243**	**2 619**	**2 634**	**20 240**	**20 422**
The EU and the UK	14 723	14 900	718	701	1 773	1 777	13 668	13 824
Russian Federation	4 529	4 545	233	234	228	236	4 528	4 544
Ukraine	1 395	1 426	136	97	417	408	1 114	1 115
OCEANIA	**1 523**	**1 537**	**118**	**119**	**81**	**82**	**1 560**	**1 575**
Australia	1 250	1 264	11	10	49	51	1 212	1 223
New Zealand	223	221	1	1	31	30	193	192
WORLD	**133 575**	**136 815**	**12 520**	**12 469**	**13 882**	**13 835**	**132 188**	**135 401**
LIFDC	7 271	7 008	1 433	1 417	9	8	8 695	8 417
LDC	3 637	3 665	1 110	1 095	9	10	4 738	4 750