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Food Outlook

BIANNUAL REPORT ON GLOBAL FOOD MARKETS

May 2019

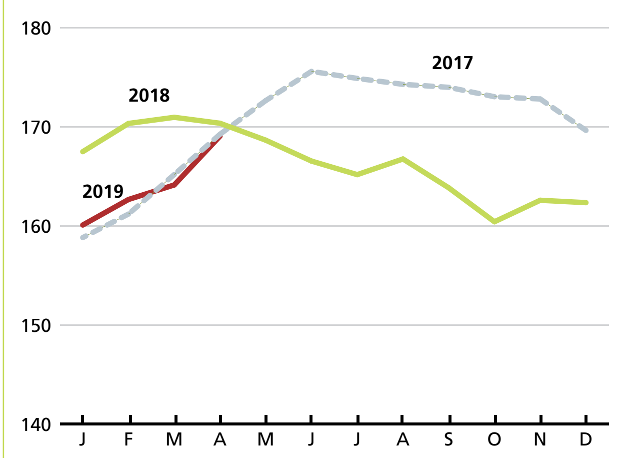
MEAT AND MEAT PRODUCTS

Global meat production is forecast to hover around 337 million tonnes in 2019 – slightly lower than in 2018. If confirmed, the 0.2 percent anticipated decline would represent the first output fall since 1996, marking a reversal shift from the slow but stable growth trend witnessed over the past two decades. Despite a likely sharp fall in pig meat output, largely as a result of the African Swine Fever (ASF), especially in China, 2019 global meat production is only expected to drop slightly, as current prospects point to a solid worldwide expansion for poultry meat production and a steady progress in bovine and ovine meat outputs. As a result of ASF, which is likely to depress pig meat output in China by at least 10 percent, the country's overall meat sector may record a 5 percent (4.3 million tonnes) contraction in 2019. Elsewhere, meat output is predicted to expand in the United States of America, Brazil, Mexico, India, the European Union (EU) and the Russian Federation, while a small production decline is anticipated in Australia.

World trade in meat and meat products is forecast to surpass 35 million tonnes in 2019, up 4.8 percent from last year. Much of the expansion is projected to stem from an expected increase of 19-20 percent in overall meat imports by China, which could reach 26 percent for pig, 23 percent for poultry and 15 percent for bovine meat. Japan, Mexico, the Philippines, Viet Nam and the Russian Federation are also expected to step up their meat purchases, while Saudi Arabia, Angola, Cuba and the Republic of Korea may import less. The expected expansion in world import demand is forecast to be met largely by increased exports from Brazil, the EU, the United States of America, Thailand, India and Argentina, while limited supplies may depress meat foreign sales by Australia, New Zealand, China and Uruguay.

Despite large export availabilities in major supplying countries, international meat prices, measured by the FAO Meat Price Index, have firmed up since January, underpinned by increased demand for pig, bovine and poultry meats, especially by China. By contrast, ovine meat prices retreated on large export supplies, mostly from Australia, where dry weather continues to induce slaughtering.

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



WORLD MEAT MARKET AT A GLANCE

	2017	2018 *estim.*	2019 *f'cast*	Change: 2019 over 2018
		million tonnes		%
WORLD BALANCE				
Production	**332.4**	**337.3**	**336.5**	**-0.2**
Bovine meat	69.6	71.2	71.6	0.7
Poultry meat	122.3	124.8	128.4	2.8
Pigmeat	119.8	120.5	115.6	-4.0
Ovine meat	15.2	15.2	15.3	0.4
Trade	**32.8**	**33.8**	**35.4**	**4.8**
Bovine meat	10.2	10.9	11.3	4.0
Poultry meat	13.1	13.3	13.8	3.7
Pigmeat	8.2	8.4	9.1	8.4
Ovine meat	1.0	1.0	1.0	-1.9
SUPPLY AND DEMAND INDICATORS				
Per caput food consumption:				
World (kg/year)	43.9	44.0	43.4	-1.3
Trade - share of prod. (%)	*9.9*	*10.0*	*10.5*	*5.0*

FAO MEAT PRICE INDEX (2002-2004=100)	**2017**	**2018**	**2019** *Jan-Apr*	**Change: Jan-Apr 2019 over Jan-Apr 2018 %**
	170	166	164	-3.4

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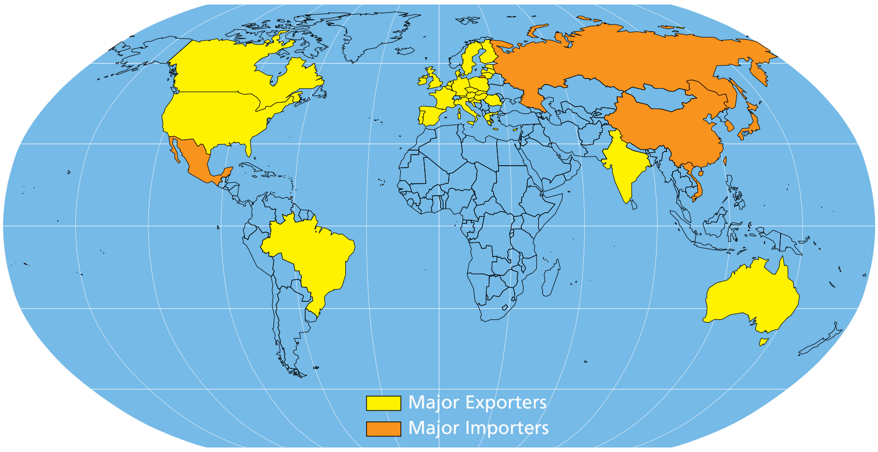
MEAT AND MEAT PRODUCTS

Major Meat Exporters and Importers



PRICES

Notwithstanding increased export availabilities in all major supplying countries, international meat prices, measured by the **FAO Meat Price Index**, have firmed up since January, underpinned by strong import demand for pig, bovine and poultry meats, especially by China. The price increase concerned all meat categories except ovine meat, which saw prices retreat on large export supplies, mostly from Australia, where dry weather continues to encourage slaughtering.

OVERALL PRODUCTION AND TRADE

World meat output[1] in 2019 is forecast to drop by 0.2 percent to nearly 337 million tonnes, breaking the pattern of slow but steady growth witnessed by the sector for almost two decades. The decline in global meat production fundamentally reflects expectations of a 5 percent output contraction in **China**, along with a small decrease in **Australia**, which are likely to outweigh expansions anticipated in all the major meat producing countries, especially the **United States of America**, **Brazil**, **Mexico**, **India**, **the European Union (EU)**, **the Russian Federation** and **Pakistan**. The spread of African

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

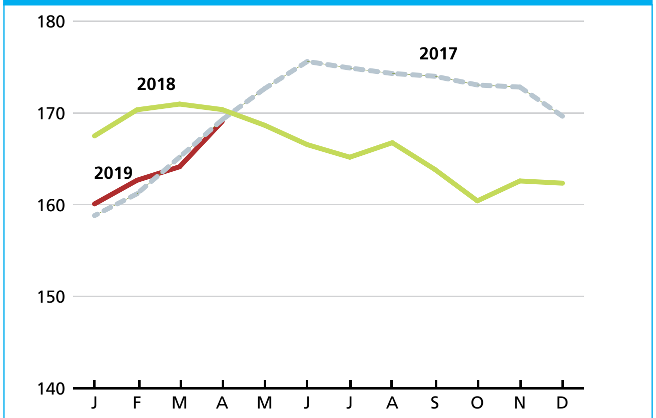
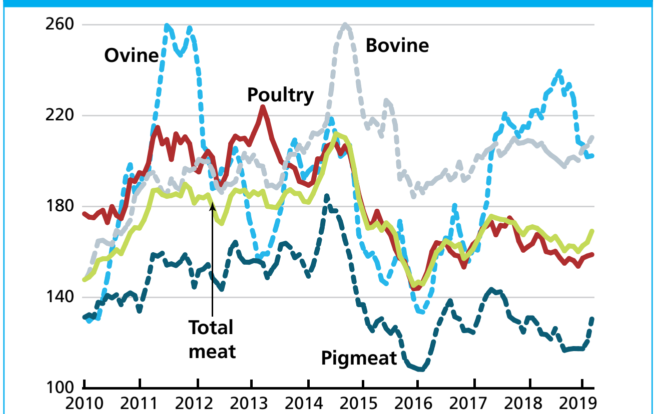


Figure 2. FAO monthly international price indices for bovine, ovine, pigmeat and poultry meat (2002-2004=100)



[1] This section refers to meat and meat products, derived from animals in the broad groups of bovines (cows, buffaloes, oxen, etc.), pigs, poultry (chickens, turkeys and ducks) and ovine (goats and sheep).

Table 1. World meat market at a glance

	2017	2018 *estim.*	2019 *f'cast*	Change: 2019 over 2018
		million tonnes		%
WORLD BALANCE				
Production	**332.4**	**337.3**	**336.5**	**-0.2**
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Swine Fever (ASF) in China, with its impacts on production, consumption and trade, represents the most significant factor currently shaping the world meat market outlook for 2019. Spread of the disease is largely behind the foreseen contraction of 4 percent in world pig meat output; although, through the substitution effect on demand, it is also expected to contribute to the 2.8 percent anticipated increase in global poultry meat output. The impact of ASF on the production of bovine and ovine meats is likely to be more limited, with both forecast to expand by less than 1 percent, reflecting industry specific circumstances, including the fact that major global producers are in distinct stages of their herd cycles.

World trade in meat and meat products is forecast to surpass 35 million tonnes in 2019, up 4.8 percent from last year. Much of the momentum is expected to stem from a 19-20 percent surge in overall meat imports by **China**, partly because of the ASF spread. Elsewhere, **Japan, Mexico, the Philippines, Viet Nam** and **the Russian Federation** are also expected to step up their meat purchases, while **Saudi Arabia, Angola, Cuba** and the **Republic of Korea** may import less. The expected expansion in world import demand is forecast to be largely met by increased exports from **Brazil,** the **EU,** the **United States of America, Thailand, India** and **Argentina**, while limited supplies may depress meat sales by **Australia, New Zealand, China** and **Uruguay**. Across the various meat types, world trade is forecast to expand by more than 8 percent in the case of pig meat (to 9.1 million tonnes), and by close to 4 percent in the case of poultry (to 13.8 million tonnes) and 4 percent for bovine meat (to 11.3 million tonnes). On the other hand, trade in ovine meat may decline slightly (to 1.0 million tonnes).

BOVINE MEAT PRODUCTION AND TRADE

Production to expand modestly on reduced cattle numbers

World bovine meat production is forecast to hover around 72 million tonnes in 2019, only 0.7 percent more than last year. Expansions are expected in **Brazil** and the **United States of America**, but also in **China**, **Mexico**, **India, Pakistan, South Africa** and **the Russian Federation.** By contrast, production is anticipated to fall in the **EU** and **Australia**, as well as in **Uruguay, Argentina** and **New Zealand**.

In **Brazil**, production could rise by 3 percent in 2019, surpassing the 10 million tonnes threshold, in view of a generally positive economic and financial outlook, the availability of a large cattle inventory, more affordable feed costs and a promising export environment. In the **United States of America**, bovine meat production is predicted to reach 12.4 million tonnes, up 1.5 percent from 2018. The relatively modest output growth reflects a slowdown in calf crop growth last year, signalling an end to the herd growth phase of the cattle cycle. **China**'s beef production is forecast to increase by 1.5 percent to 6.5 million tonnes, with expansions in large-scale operations moderated by limited smallholders' contribution, as rising costs of rearing cattle continue to push less efficient producers out of the industry. **Mexico** is forecast to expand its beef production by about 2 percent, building on recent success in expanding feedlot production and federally inspected slaughter and improved meat processing technology. For **India,** although the factors affecting the outlook are relatively mixed, production is expected to rise by just 1 percent. While the emerging favourable external trading environment may offer opportunities to increase production, laws restricting the transport and slaughter of cows, effective in 23 out of the 29 states, are likely to hinder growth. Although production is set to rise somewhat in **South Africa**, the country's sector continues to face challenges, especially poor rainfall and dryness. Moreover, recent detection of food-and-mouth disease in the country has led to temporary import bans of its products by some countries such as Botswana and Namibia, dimming production prospects. The **Russian Federation** may see an increase in beef production on improved prospects for exports and state support.

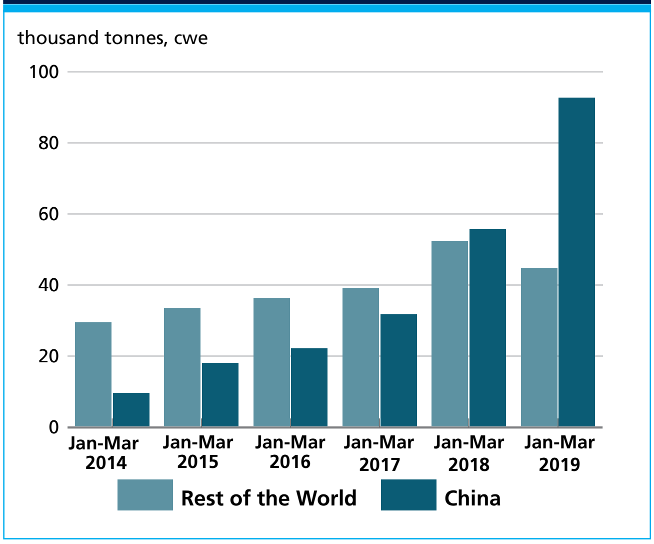
Notwithstanding increased import demand, some of the world's leading beef suppliers may face production contractions in 2019. These include the **EU**, where the cattle herd has shrunk – both due to the structural decline seen in recent years and to the high slaughter induced by dry weather last summer – which may result in a 1.3 percent contraction in output. Following the recent drought-induced slaughter, **Australia**'s beef production may fall by almost 5 percent. Moreover, Australia may begin its next phase of herd rebuilding, which would further reduce animals available for slaughter. In **Uruguay**, limited availability of animals for slaughter may also reduce production by 5 percent, despite strong import demand – the primary driver of production given the near saturation of the domestic market. Although **Argentina** realized a 7.3 percent expansion in 2018, bovine meat production prospects are not as positive this year; production could fall by 1 percent, given the limited availability of cattle with the minimum slaughter-weight. Likewise, given the need to reconstitute its cattle herd, following elevated beef production in 2018, **New Zealand** may be obliged to cut production by almost 2 percent in 2019.

Trade expansion is likely

World bovine meat exports are forecast to reach 11.3 million tonnes in 2019, up 4.0 percent from last year. **China**'s imports are predicted to increase by almost 15 percent to about 2.3 million tonnes in 2019, equivalent to one-fifth of the global bovine meat trade. In addition, **Japan**, **Canada**, **Mexico** and **the Republic of Korea** may import more in 2019, mostly on rising demand for more specialized meat types, including processed meat. In the case of **Japan,** the expansion is likely to be facilitated by a reduction of tariffs on beef imports (effective 30 December 2018) from countries in the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP).

Most of the increased import demand will be met by supplies from the Americas and the **EU**. In the Americas, **Brazil**'s exports are anticipated to surge by 10 percent, with shipments mostly going to Asia, especially China, and the Middle East. Sales may also receive a boost from the Russian Federation's lifting of its ban on imports from some Brazilian processors. **Argentina** is forecast to expand exports by more than 20 percent on rising demand for imports of quality beef, mostly from China, but also the United States of America, under newly gained market access for premium chilled, grass-fed beef cuts. Benefiting from the emerging global meat market tightness, **India**'s exports could recover from the slump it recorded last year, rebounding by more than 9 percent in 2019. However, increased restraints by the Chinese customs authorities on 'grey meat' imports from its neighbouring countries, such as Viet Nam, could limit export growth of bovine meat from India - the country of origin.

Figure 3. Bovine meat: Argentina exports



PIGMEAT PRODUCTION AND TRADE

Production: New outbreaks of African Swine Fever behind a sharp contraction in output

Global pig meat production is forecast at 115.6 million tonnes, a decline of 4.0 percent from 2018. The contraction principally reflects a sharp fall in **China**, which is expected to outweigh expansions especially in the **United States of America**, **Brazil** and **the Russian Federation.** Meanwhile, pig meat output in the **EU** is forecast to remain stable.

In **China**, official notifications had confirmed 129 ASF outbreaks and the culling of more than 1 million pigs by 23 April 2019. In addition to culling, in an effort to keep the spread in check, the Government is creating separate, self-sufficient zones and ban the cross-regional transport of animals and products. However, the continued relevance of backyard farming and the use of food waste as animal feed make controlling the spread extremely challenging. The transboundary spread of ASF to other countries in the region, with confirmed detections in Viet Nam, Mongolia and Cambodia, will make controlling the spread even harder. According to the Chinese Ministry of Agriculture and Rural Affairs, by March 2019, the hog inventory had declined by 18.8 percent, and that of the breeding sow by 21 percent year-on-year. In view of these developments, China's pig meat output is anticipated to fall by at least

10 percent in 2019, to 6 million tonnes.

In the **EU**, pig meat production is forecast to remain stable at about 24 million tonnes. Although sharp increases in import demand from China have brightened the sector's prospects, with pig meat prices showing a recent upturn, the continued spread of ASF in countries such as Romania, Hungary and Poland is dimming the EU 2019 production outlook. The **United States of America** is forecast to raise production by 3.8 percent to nearly 12 million tonnes this year, relying on its largest pig herd inventory since 2009. After two years of contraction, **Brazil**'s production is anticipated to rebound by 5.5 percent, spurred by robust availability of feed supplies following record maize and soybean crops and a strong foreign demand. However, there is concern that feed costs may rise if the Brazilian *real* depreciates further, as such development would encourage grain exports over supplying to the domestic feed industry. In **the Russian Federation**, pig meat output is set to expand by 3 percent, underpinned by large-scale investments in new breeding operations, farms and processing facilities. Growing import demand may provide additional support, although depressed domestic prices and escalating costs, in part to meet tighter environmental regulations, could undermine progress. In **Mexico**, year-on-year growth in pig meat production may reach 4 percent, underpinned by larger herd numbers, attractive producer prices and the prospect of a new trade deal with its northern neighbours that may come into force.

Figure 4. FAO meat and feed price indices

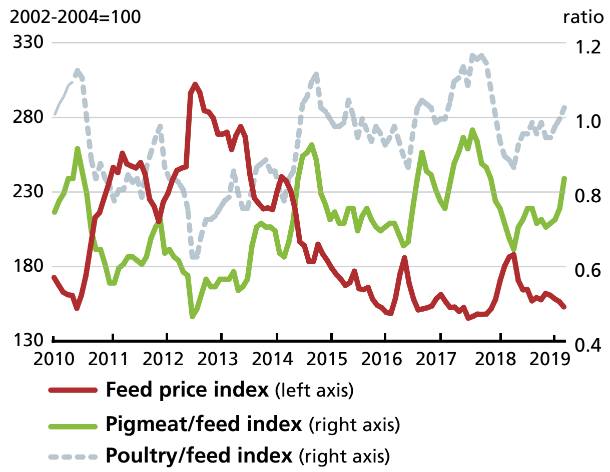
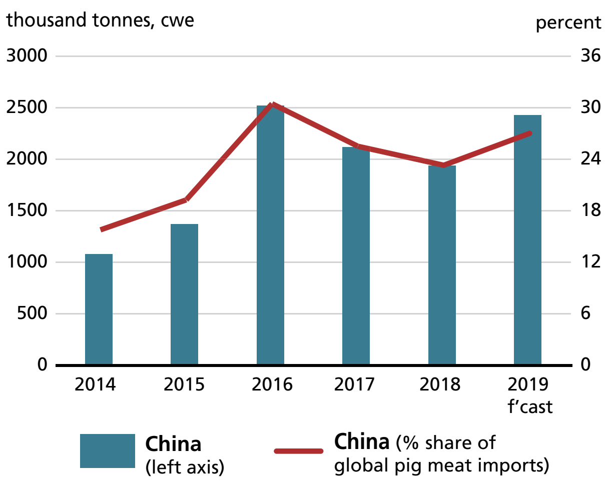


Figure 5. China's pig meat imports



Trade to expand sharply

World pig meat exports are forecast to reach 9.1 million tonnes in 2019, an increase of 8.4 percent from last year. **China** is expected to boost its pig meat imports by as much as 26 percent, to a total of nearly 2.4 million tonnes, equivalent to nearly 27 percent of world trade. Elsewhere, imports are predicted to increase in **the Russian Federation, Japan** and **Mexico**, but decline in the **Republic of Korea**, the **United States of America** and **Angola**. The **EU**, the **United States of America**, **Canada** and **Brazil** are anticipated to supply 90 percent of total world pig meat exports in 2019, with the balance mostly to be covered by **Chile**, **Mexico**, **China** and **the Russian Federation.**

The **EU** will remain a top pig meat exporter, with the bulk of its shipments going to Asia, namely China, Japan, the Republic of Korea and the Philippines. Notwithstanding the stagnation in production, a reliance on accumulated large meat stocks could allow the EU to expand its exports by 10 percent this year. **Brazil**'s exports are also anticipated to advance in 2019. The country may benefit from abundant export availabilities, improvements in the image of its meat quality, and increased or newly gained market access in the Philippines, the Republic of Korea, Viet Nam and South Africa. Despite retaliatory tariffs in place, China has begun importing significant quantities of pig meat from the **United States of America**, giving rise to an expectation that United States of America exports may register a 5 percent growth in 2019.

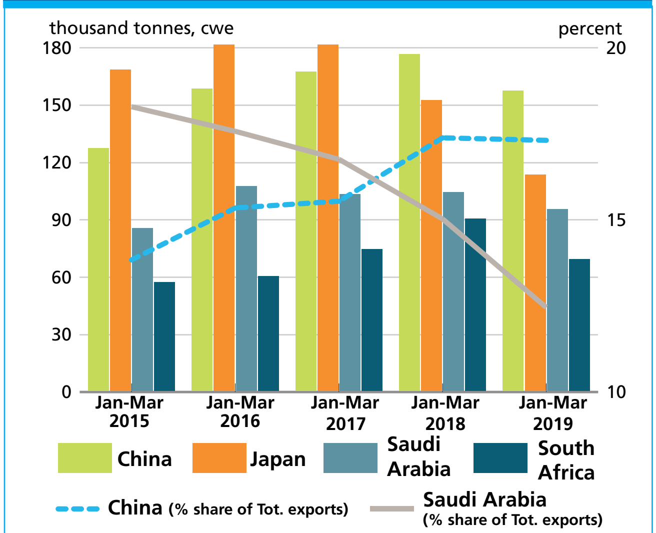
POULTRY MEAT PRODUCTION AND TRADE

Poultry production to regain vigour in 2019 after two years of subdued growth

After two years of sluggish growth, world poultry meat output is forecast to expand by 2.8 percent to 128 million tonnes in 2019, showing signs of regained vigour. This year's positive outlook is due to the successful containment of the spread of Highly Pathogenic Avian Influenza (HPAI) and the strong potential for poultry meat to be used as a substitute for pig meat. The expected expansion in global poultry meat production would mostly occur in **China**, the **EU**, **Brazil**, the **United States of America**, **India**, **Pakistan** and **Mexico**, with smaller expansions in **Turkey**, **Colombia** and **Thailand**.

Following two years of near stagnation linked to the prevalence of HPAI, poultry production in **China** is anticipated to rebound by 7 percent in 2019. The increase is expected amid rising consumer demand for poultry meat, partly as a substitute for pig meat – a factor that is exerting pressure on domestic poultry prices to rise, which should enable producers to increase output, despite costly feeds. Output in the **United States of America**, the world's leading producer, is currently anticipated to grow by 1 percent to 22.6 million tonnes, with the expansion resulting from a large bird flock and newly added processing capacities. In **Brazil**, the sector is expected to recover by 2 percent this year, as the country implements several programmes to solve problems faced by the industry in 2018, which led to the restriction of access to various important markets. Programmes include the application of scientific methods for monitoring slaughterhouses and packing operations, and a self-regulating system. Brazil also aims to overcome technical difficulties in meeting *halal* food requirements in the Middle East. Overall, the Brazilian poultry sector continues to benefit from its HPAI-free status, a strong internal market and geographically diversified foreign markets. **India**'s poultry production is forecast to expand by 5 percent this year, mainly to meet the dynamic domestic demand, with the increase facilitated by a growing market for hatcheries. **Pakistan**'s poultry meat output is set to expand by more than 8 percent, on better market access opportunities in the Middle East and improvements to the production facilities. Elsewhere, a combination of factors is behind the expected slow output growth in several countries, especially some reluctance on the part of smallholders to expand production due to low producer prices (the Russian Federation) and high input costs (Indonesia).

Figure 6. Brazil's poultry meat exports by major destinations



Trade: rising optimism amidst a surge in imports

World exports of poultry meat are predicted to expand by 3.7 percent and reach 13.8 million tonnes in 2019. The market optimism rests principally on expectations of a strong growth in import demand, mainly from **China**, but also **Japan**, **the Philippines**, **Mexico** and **Ghana**. Purchases by **China**, one of the main drivers of the global poultry trade, are currently forecast to surge by nearly 23 percent year-on-year. The Government has granted exemptions from anti-dumping tariffs on imports from 14 Brazilian firms, on the condition of setting a floor price for their exports, which would facilitate more imports. In addition, China also opened its market to poultry meat from the Russian Federation. In **Japan**, consumer demand for processed, ready-to-eat poultry products from reliable suppliers has been rising, a trend that is expected to boost imports by 3 percent this year. Imports are also expected to increase vigorously in **the Philippines**, **Mexico** and **Ghana**, as poultry remains the most affordable meat for the bulk of middle- and low-income populations. By contrast, **Saudi Arabia** may purchase less this year, as restrictions on imports remain, with further reductions in the number of firms eligible to export poultry from Brazil, one of the largest suppliers in 2018.

Nearly 80 percent of global exports of poultry meat is forecast to originate in **Thailand**, **Brazil**, **Turkey**, **Ukraine**, the **United States of America** and the **EU**.

OVINE MEAT PRODUCTION AND TRADE

Production: continued modest growth

World ovine meat output is forecast at 15.3 million tonnes in 2019, an increase of 0.4 percent from 2018, mostly originating in Asia, especially in China, along with more modest expansions in Africa. By contrast, outputs are forecast to decline in Oceania and Europe.

China's sheep and goat flock expanded by an average rate of 3.1 percent from 2013 to 2017, but by only 0.8 percent in 2018, reflecting a reduction in breeding ewes. Despite the need to rebuild flocks, meat price increases may encourage Chinese farmers to slaughter animals and increase production by almost 2 percent. Following a decline in 2018, ovine meat output in the **EU** is forecast to slightly decrease this year, due to high ewe mortality in 2018. Meanwhile, there is a growing concern that a no-deal Brexit will generate supply imbalances across the English Channel, since nearly one-third of ovine meat in the EU is produced in the United Kingdom. Ovine meat output is anticipated to fall by 3.5 percent in **Australia**, where dry weather conditions continued into 2019, further depleting feedstock and deteriorating pasture. Under current expectations for weather improvements, flock rebuilding in the country is likely to begin from mid-2019, probably reducing export availabilities. **New Zealand**'s ovine meat production is also forecast to decline, in view of the continued reduction in its sheep numbers, partially moderated by an increase in carcass weight.

Trade: limited availability for exports to depress trade

World trade in ovine meat is forecast to decline by 1.9 percent in 2019, due to reduced export availabilities from Australia and New Zealand, which together historically supply more than 80 percent of the ovine meat traded internationally. **Australia** is projected to record a 4.5 percent drop in exports, while **New Zealand** may see a contraction of around 1 percent. In recent years, an increasingly high proportion of exports has been destined for Asia, mainly China

Limited export availabilities in 2019 are forcing global importers, including China, to cut back on their international purchases.

MEAT: MAJOR POLICY DEVELOPMENTS MID-OCTOBER 2018 TO MID-APRIL 2019*

COUNTRY	DATE	PRODUCT	POLICY INSTRUMENT	DESCRIPTION
China (Macao Special Administrative Region)	Feb-19	Poultry meat	Import ban lifted	Lifted ban on imports of poultry and poultry-derived products from Cambodia, China (Taiwan Province), and three provinces from China (Mainland), namely Guangxi, Hubei and Hunan, as well as Indonesia, Japan, the Lao People's Democratic Republic, the Republic of Korea, Thailand and Viet Nam, imposed 15 years ago following Highly Pathogenic Avian Influenza (HPAI) outbreaks.
China (Mainland)	Jan-19	Pig meat	Import ban	Banned imports of pigs, wild boars and products from Mongolia and Viet Nam after they reported African Swine Fever (ASF) outbreaks in mid-January.
	Feb-19	Poultry meat	Market access	Granted the right to supply poultry meat products from several farms in the Russian Federation, with no restrictions on the volume, as long as they meet strict Chinese food safety requirements.
	Feb-19	Poultry meat	Market access	Exempted 14 Brazilian firms from anti-dumping tariffs on imports of poultry products, on condition that they are sold above a certain floor price, which has not been disclosed.
	Mar-19	Poultry meat	Import ban lifted	Signed an agreement with France to lift the embargo on French poultry exports, set in place in 2015 after cases of bird flu were detected in Dordogne.
European Union	Oct-18	All	Trade agreement	Signed a Free Trade Agreement with Singapore, with the objective of eliminating customs duties within five years for qualifying products from Singapore, including meat and meat products.
Japan	Dec-18	All	Trade agreement	Lowered tariffs on beef imports from European Union (EU) member countries under the Japan-EU Economic Partnership Agreement (EPA), effective 1 February 2019. Under the new tariff structure, Japan granted reduced tariff rates from 1 April 2019 on pig meat imports from EU member countries, and allowed imports to fill the domestic supply gap and rebuild stocks when necessary.
	Jan-19	Bovine meat	Import ban lifted	Announced the end of a two-decade ban on the import of beef and lamb from the United Kingdom (UK), implemented in 1996 to prevent the spread of bovine spongiform encephalopathy (BSE).
	Mar-19	All	Quota	Announced safeguard trigger levels for chilled beef and pork for the first three-quarters of Japanese fiscal year 2019 (April-December), applicable for all trading partners.
Republic of Korea	Feb-19	All	Market access	Cleared 9 more Brazilian poultry and pig meat processing plants to export products. This follows the lifting of restrictions last year on 4 Brazilian processing plants after a 10-year negotiation.
Malaysia	Oct-18	Pig meat	Import ban lifted	Lifted ban on frozen pork from Belgium, imposed after the detection of an ASF outbreak.

COUNTRY	DATE	PRODUCT	POLICY INSTRUMENT	DESCRIPTION
Mexico	Nov-18	Poultry meat	Market access	Authorised 26 Brazilian meat plants to export chicken products into the country.
Multilateral	Nov-18	All	Trade agreement	Signed the Mexico-United States of America-Canada Agreement, updating the 1994 North American Free Trade Agreement (NAFTA). The agreement is subject to ratification by respective governments in the three countries, and will have a significant impact on meat trade.
	Dec-18	All	Trade agreement	Entered into force, the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) among Australia, Canada, Japan, Mexico, New Zealand and Singapore, on 30 December 2018, and in Viet Nam on 14 January 2019. The agreement includes tariff reduction clauses and tariff rate quotas to be implemented by each member country on a staggered basis, and covers a wide range of goods, including meat and meat products.
	Dec-18	Bovine meat	Trade agreement	Agreed to allow each other's beef imports to expand bilateral trade on beef products between Japan and Uruguay. Japan imports of beef from Uruguay had been suspended since 2000 due to an outbreak of Foot-and-Mouth-Disease (FMD) there.
Namibia	Jan-19	All	Import ban	Suspended meat imports from South Africa due to an outbreak of FMD.
Oman	Oct-18	Poultry meat	Import ban	Banned imports of poultry and poultry products from Cambodia, Malaysia and Viet Nam following HPAI outbreaks.
Russian Federation	Nov-18	All	Import ban lifted	Lifted the ban on Brazilian pork and beef imports, imposed in December 2017, allowing 9 beef plants and 6 pork plants to export their products.
	Feb-19	Bovine meat	Import ban lifted	Lifted a ban on Colombian beef imports after verification that the country is free from the FMD virus, in accordance with recommendations set out by the World Organization for Animal Health.
	Mar-19	Bovine meat	Import ban	Suspended imports of bone-in beef from all countries that lack official status for BSE.
Saudi Arabia	Jan-19	Poultry meat	Market access	Reduced the number of Brazilian plants with valid export permits eligible to export poultry meat to 25.
South Africa	Mar-19	Bovine meat	Market access	Resumed exports of beef and beef products, which were banned by a number of importing countries after an FMD outbreak in January. Required veterinary health certificates have been issued for beef exports to resume to countries including Egypt, Lesotho, Mozambique and the United Arab Emirates.
Tunisia	Nov-18	Poultry meat	Market access	Allowed its first poultry imports from Ukraine.

COUNTRY	DATE	PRODUCT	POLICY INSTRUMENT	DESCRIPTION
Turkey	Jan-19	Bovine meat	Import ban	Suspended live cattle imports from Ireland, to protect domestic production amid concerns about an oversupply of beef.
Ukraine	Apr-19	Bovine meat	Market access	Joined the list of countries authorized to supply bovine meat to Saudi Arabia.
United Arab Emirates	Feb-19	Poultry meat	Import ban	Suspended poultry imports from Kuwait due to the detection of HPAI virus.
United States of America	Nov-18	Bovine meat	Market access	Lifted ban on fresh beef from Argentina after almost two decades. Argentina will have a duty-free quota of 20 000 tonnes/year at a tariff rate of 26.4 percent for out-of-quota shipments.
	Dec-18	Bovine meat	Market access	Announced that the Government of Morocco has agreed to allow imports of US beef and beef products. Morocco opened its market to US poultry in August 2018, under the terms of the US-Morocco Free Trade Agreement.

* 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	
	2018 *estim.*	2019 *f'cast*	2018 *estim.*	2019 *f'cast*	2018 *estim.*	2019 *f'cast*	2018 *estim.*	2019 *f'cast*
ASIA	**140 618**	**137 236**	**18 015**	**19 260**	**4 339**	**4 664**	**154 215**	**151 866**
China	86 644	82 348	5 400	6 435	489	455	91 576	88 328
India	7 442	7 646	1	1	1 472	1 604	5 971	6 043
Indonesia	3 333	3 346	218	221	5	5	3 547	3 563
Iran, Islamic Republic of	3 058	3 082	201	206	58	59	3 200	3 228
Japan	4 027	4 081	3 721	3 828	19	21	7 710	7 900
Korea, Republic of	2 519	2 570	1 505	1 488	43	50	3 874	4 025
Malaysia	2 004	2 034	344	354	70	71	2 279	2 317
Pakistan	3 778	3 920	30	29	77	79	3 731	3 871
Philippines	3 604	3 722	629	691	7	7	4 226	4 406
Saudi Arabia	887	939	887	841	68	66	1 706	1 715
Singapore	117	117	376	389	56	55	437	450
Thailand	2 836	2 897	22	24	1 216	1 352	1 650	1 574
Turkey	3 620	3 731	67	52	544	627	3 163	3 157
Viet Nam	5 251	5 267	1 598	1 657	25	15	6 824	6 909
AFRICA	**18 824**	**18 980**	**3 033**	**3 093**	**252**	**258**	**21 605**	**21 814**
Algeria	732	735	64	66	1	1	794	799
Angola	300	311	540	520	-	-	840	831
Egypt	2 245	2 290	335	350	8	8	2 571	2 631
Nigeria	1 377	1 377	4	4	-	-	1 381	1 381
South Africa	3 176	3 258	640	659	147	147	3 670	3 770
CENTRAL AMERICA	**10 190**	**10 439**	**3 618**	**3 703**	**742**	**783**	**13 066**	**13 359**
Cuba	388	398	347	329	-	-	735	727
Mexico	7 022	7 227	2 276	2 355	480	518	8 818	9 064
SOUTH AMERICA	**44 098**	**45 086**	**1 278**	**1 321**	**8 903**	**9 556**	**36 474**	**36 851**
Argentina	5 978	6 024	67	70	754	879	5 290	5 215
Brazil	27 547	28 337	59	53	6 946	7 463	20 659	20 927
Chile	1 518	1 559	685	689	377	408	1 826	1 840
Colombia	2 787	2 891	231	263	26	28	2 993	3 126
Uruguay	642	611	79	92	438	425	283	279
Venezuela	1 164	1 145	10	9	-	-	1 174	1 154
NORTH AMERICA	**51 777**	**52 712**	**2 959**	**2 991**	**9 969**	**10 275**	**44 745**	**45 433**
Canada	4 877	4 948	772	819	1 922	2 007	3 719	3 782
United States of America	46 900	47 763	2 176	2 160	8 047	8 268	41 014	41 639
EUROPE	**65 075**	**65 495**	**2 908**	**2 999**	**6 434**	**6 856**	**61 548**	**61 637**
Belarus	1 265	1 241	63	61	458	464	871	838
European Union	49 397	49 584	1 311	1 334	5 131	5 468	45 577	45 450
Russian Federation	10 393	10 555	868	925	347	374	10 915	11 107
Ukraine	2 302	2 379	174	182	384	431	2 092	2 130
OCEANIA	**6 697**	**6 563**	**497**	**514**	**3 147**	**3 000**	**4 046**	**4 077**
Australia	4 760	4 647	250	264	2 106	2 003	2 905	2 909
New Zealand	1 416	1 395	83	85	1 038	994	460	487
WORLD	**337 279**	**336 510**	**32 308**	**33 880**	**33 787**	**35 393**	**335 700**	**335 037**
Developing countries	209 409	207 362	22 282	23 604	14 211	15 233	217 421	215 755
Developed countries	127 870	129 148	10 026	10 276	19 576	20 159	118 279	119 283
LIFDC	25 407	25 628	3 065	3 162	1 683	1 808	26 788	26 982
LDC	13 007	13 021	1 511	1 505	28	28	14 489	14 498

[1] including "other meat"

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

	Production		Imports		Exports		Utilization	
	2018 *estim.*	**2019** *f'cast*	**2018** *estim.*	**2019** *f'cast*	**2018** *estim.*	**2019** *f'cast*	**2018** *estim.*	**2019** *f'cast*
ASIA	**44 704**	**46 873**	**6 601**	**6 951**	**2 270**	**2 477**	**49 041**	**51 352**
China	19 020	20 390	1 130	1 389	332	319	19 818	21 460
India	3 707	3 892	-	-	7	7	3 700	3 886
Indonesia	2 290	2 297	-	-	-	-	2 290	2 297
Iran, Islamic Republic of	2 196	2 218	-	-	52	53	2 144	2 165
Japan	2 246	2 293	1 324	1 365	10	10	3 558	3 658
Korea, Republic of	900	920	186	203	37	44	1 049	1 069
Kuwait	58	59	155	160	-	-	213	219
Malaysia	1 753	1 781	72	80	52	53	1 773	1 809
Saudi Arabia	667	718	638	591	40	38	1 265	1 271
Singapore	96	96	172	184	15	15	253	265
Thailand	1 777	1 839	2	2	1 135	1 268	652	578
Turkey	2 229	2 338	6	7	502	582	1 734	1 763
Yemen	147	126	88	90	-	-	235	216
AFRICA	**5 861**	**5 971**	**2 088**	**2 144**	**85**	**93**	**7 864**	**8 022**
Angola	40	38	329	315	-	-	369	353
South Africa	1 689	1 745	567	584	54	60	2 201	2 269
CENTRAL AMERICA	**5 075**	**5 205**	**1 783**	**1 799**	**40**	**43**	**6 818**	**6 960**
Cuba	34	35	286	268	-	-	320	303
Mexico	3 330	3 440	989	1 013	10	12	4 310	4 442
SOUTH AMERICA	**21 603**	**22 044**	**364**	**373**	**4 423**	**4 553**	**17 544**	**17 864**
Argentina	2 122	2 133	7	7	194	206	1 936	1 934
Brazil	13 931	14 224	3	3	4 050	4 158	9 885	10 069
Chile	766	784	152	150	167	176	752	758
Venezuela	600	600	2	1	-	-	602	601
NORTH AMERICA	**23 887**	**24 151**	**343**	**350**	**4 014**	**4 059**	**20 192**	**20 453**
Canada	1 491	1 531	193	199	162	169	1 513	1 566
United States of America	22 396	22 620	145	147	3 852	3 891	18 675	18 883
EUROPE	**22 165**	**22 579**	**1 267**	**1 286**	**2 364**	**2 460**	**21 068**	**21 404**
European Union	15 248	15 557	723	740	1 644	1 681	14 327	14 617
Russian Federation	4 688	4 717	215	211	195	208	4 708	4 720
Ukraine	1 279	1 347	134	136	331	381	1 081	1 102
OCEANIA	**1 515**	**1 538**	**105**	**105**	**65**	**66**	**1 555**	**1 578**
Australia	1 260	1 284	15	15	40	41	1 234	1 257
New Zealand	220	219	-	1	25	24	196	196
WORLD	**124 811**	**128 360**	**12 551**	**13 009**	**13 262**	**13 752**	**124 082**	**127 634**
Developing countries	74 403	77 202	9 601	9 991	6 800	7 148	77 212	80 040
Developed countries	50 408	51 158	2 950	3 018	6 462	6 604	46 871	47 594
LIFDC	6 770	7 017	1 869	1 912	11	11	8 628	8 919
LDC	3 256	3 248	1 131	1 130	2	2	4 385	4 376