



Food and Agriculture
Organization of the
United Nations

Food Outlook

BIANNUAL REPORT ON GLOBAL FOOD MARKETS



November 2019

MEAT AND MEAT PRODUCTS

World meat production is forecast at around 335 million tonnes (in carcass weight equivalent) in 2019 1.0 percent lower than in 2018. This marks a departure from the stable growth trend recorded over the past two decades and indicates a sharper fall than anticipated in May, principally due to a deeper than earlier expected impact of African Swine Fever (ASF) in China and its spread to several East Asian countries. China's meat output is forecast to fall by 8 percent, offsetting expected increases in production in several major producing countries, namely the United States, Brazil, the European Union and Argentina. The overall decline in China's meat output reflects a contraction of pig meat output by at least 20 percent, partially offset by higher production of other meats. In the United States, a rise in carcass weights is sustaining growth, whereas in Brazil external demand is encouraging higher production. In the European Union, total meat output is also expected to expand, albeit slower than predicted earlier due to a likely decline in bovine meat production. Production gains are expected for all other categories of meat in the European Union, especially pig meat production, reflecting robust demand from China. Argentina's meat production is likely to rise, primarily on increased culling.

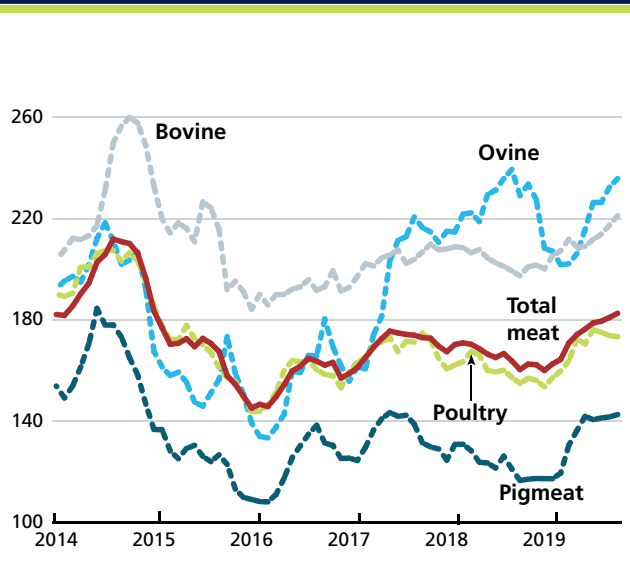
World trade in meat and meat products is forecast at 36.0 million tonnes in 2019, up 6.7 percent from 2018, principally driven by increased imports by China due to domestic tightness caused by ASF-related production losses. China's overall meat imports are expected to rise by 35 percent (around 2 million tonnes), with increased purchases across all meat categories. By contrast, several countries are expected to import less meat, including the United States and Angola. On the export side, much of the anticipated expansion in global demand is forecast to be met by Brazil, the European Union, the United States, Argentina, Thailand and Canada. However, limited export availabilities could depress meat shipments from Paraguay, Belarus and Uruguay.

International meat prices, measured by the FAO Meat Price Index, have continued to register moderate month-on-month increases since the start of 2019, with pig meat prices, frozen in particular, recording the sharpest rise due to the surge in import demand by China. Poultry, ovine and bovine meat prices strengthened, also supported by stronger Asian demand.

Contact:

Upali.GalketiAratchilage@fao.org

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



WORLD MEAT MARKET AT A GLANCE

	2017	2018 <i>estim.</i>	2019 <i>f'cast</i>	Change: 2019 over 2018	
			May	Nov.	
	<i>million tonnes (carcass weight equivalent)</i>				
WORLD BALANCE					
Production	333.6	338.6	336.5	335.2	-1.0
Bovine meat	69.6	71.3	71.6	72.2	1.3
Poultry meat	122.3	124.6	128.4	130.5	4.7
Pig meat	119.8	120.7	115.6	110.5	-8.5
Ovine meat	15.2	15.3	15.3	15.4	0.8
Trade	32.7	33.8	35.4	36.0	6.7
Bovine meat	9.8	10.5	11.3	11.1	6.0
Poultry meat	13.2	13.5	13.8	14.1	4.4
Pig meat	8.2	8.4	9.1	9.4	12.2
Ovine meat	1.0	1.0	1.0	1.0	-1.2
SUPPLY AND DEMAND INDICATORS					
Per caput food consumption:					
World (kg/year)	44.0	44.2	43.4	43.3	-2.1
Trade - share of prod. (%)	9.8	10.0	10.5	10.8	7.7
FAO MEAT PRICE INDEX (2002–2004=100)	2017	2018	2019		%Change
			Jan–Oct	Jan–Oct	2019 over Jan–Oct 2018
	170	166	173	173	3.6

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

COUNTRY	DATE	PRODUCT	POLICY INSTRUMENT	DESCRIPTION
Argentina	Apr-19	Pig meat	Trade agreement	Announced a deal with Chinese authorities to export pig meat to China from 25 of the country's meatpacking plants.
	Sep-19	All	Trade agreement	Announced that, after a first shipment in June, 15 Argentinian meat processing plants were cleared to supply bovine and poultry meat to China.
Brazil	Sep-19	All	Market access	Announced that 25 meat processing plants in the country have received authorization to export to China.
Canada	May-19	All	Tariff lifted	Lifted tariff on US bovine and pig meat, under a deal signed with the United States to remove its tariffs on steel and aluminium imports from Canada.
	Jun-19	All	Export ban	Agreed to suspend permits for meat exports to China after a request from Chinese authorities due to a detected case of ractopamine, a feed additive banned in China.
China (Mainland)	Apr-19	Pig meat	Import ban	Announced an import ban on meat products derived from pigs and wild boars from Cambodia, after detection of a case of African Swine Fever (ASF).
	Jun-19	Pig meat	Import ban	Announced an import ban on meat products derived from pigs and wild boars from the Lao People's Democratic Republic due to ASF outbreaks reported by the country.
	Aug-19	Pig meat	Import ban	Announced an import ban on meat products derived from pigs and wild boars from Myanmar due to concerns over ASF.
	Aug-19	Pig meat	Import ban	Announced an import ban on meat products derived from pigs and wild boars from Slovakia, after a case of ASF was detected in a backyard swine herd.
	Aug-19	All	Tariff	Announced an extra 10 percent tariff on bovine and pig meat imports from the United States, starting from September 1, 2019. This is in addition to the 25 percent retaliatory tariff imposed by China on meat imports from the United States in July 2018.
	Sep-19	Pig meat	Production support	Announced the implementation of a series of policies aimed at supporting national pig meat production, including subsidies for constructing large pig farms and simplifying procedures for obtaining and reducing the cost of land for pig farms.
	Sep-19	Bovine meat	Market access	Approved imports of bovine meat from three Ukrainian plants.
	Sep-19	Bovine meat	Market access	Authorized first bovine meat imports from Lithuania following an audit by Chinese inspectors.
	Sep-19	Pig meat	Import ban	Banned pig meat imports from the Republic of Korea over ASF concerns.
	Sep-19	Pig meat	Import policy	Delisted all companies that provided halal certification for US bovine meat exports and obligated exporters to obtain the halal certificate from a single company.

COUNTRY	DATE	PRODUCT	POLICY INSTRUMENT	DESCRIPTION
Eswatini	Jun-19	Pig meat	Import ban	Banned imports of live pigs from South Africa after a reported outbreak of ASF.
European Union	Apr-19	All	Import policy	Agreed on a series of changes to rules on imports of animal products from countries including Argentina, the Russian Federation and Egypt. In the case of Argentina, the European Union (EU) has agreed to allow fresh bone-in meat from 'Patagonia Norte A', a region declared free from foot-and-mouth disease (FMD).
	Jun-19	All	Trade agreement	Signed a trade agreement and an investment protection agreement with Viet Nam on 30 June 2019, aimed at granting preferential treatment for goods and services and eliminating non-tariff barriers encountered by both sides. For the meat sector, the agreements offer duty-free access into Viet Nam for EU frozen pig meat after 7 years, and provide for poultry meat to be fully liberalized after 10 years.
	Jun-19	All	Trade agreement	Reached an agreement with Southern Common Market (MERCOSUR), comprising Argentina, Brazil, Paraguay and Uruguay, aimed at removing the majority of tariffs, simplifying customs procedures and protecting geographical indicators. In the meat sector, MERCOSUR countries will command a 42.5 percent share of the new 99 000 tonne annual quota for bovine meat exports to EU member countries, with a tariff rate of 7.5 percent. Once implemented, the agreement will reduce the bovine meat quota levy, known as the Hilton quota, from 20 percent to zero.
	Aug-19	Bovine meat	Trade agreement	Signed an agreement with the United States, reviewing the functioning of the existing quota to import hormone-free beef into the EU. The agreement establishes that 35 000 tonnes of the non-hormone treated quota out of the total of 45 000 will be allocated to the US, phased over a 7-year period, with the remaining amount made available to all other exporters.
Indonesia	Aug-19	All	Import ban lifted	Reopened its market to shipments of bovine and poultry meat from Brazil, following a ruling by the dispute settlement body of the World Trade Organization in favour of Brazil.
Japan	May-19	All	Tariff rate quota	Announced the safeguard (SG) trigger levels for bovine and pig meat for the fourth quarter of Japanese fiscal year 2019 (January 2020–March 2020). The bovine meat SG trigger is set at 117 percent of the previous year's trade, while the pig meat SG trigger level is set at 119 percent of the average of the three previous years of trade.
	May-19	Bovine meat	Market access	Lifted the age restriction on Canadian bovine meat exports. Under the rule in place since 2003 after the detection of bovine spongiform encephalopathy (BSE), Japan only imported bovine meat derived from cattle less than 30 months-old.
	Jul-19	Ovine meat	Market access	Authorized imports of ovine meat from Ireland.
	Jul-19	Poultry meat	Import ban	Imposed a temporary ban on imports of poultry meat and eggs from Denmark, following a recent outbreak of low pathogenic avian flu (LPAI).
	Sep-19	Poultry meat	Import ban	Suspended imports of poultry meat and egg products from Chile, following an outbreak of H7 LPAI.
Republic of Korea	Sep-19	Bovine meat	Import ban lifted	Removed restrictions for bovine meat imports from the EU, in place since 2001 due to BSE.

COUNTRY	DATE	PRODUCT	POLICY INSTRUMENT	DESCRIPTION
Mexico	May-19	Poultry meat	Tariff rate quota	Announced an increase of the tariff rate quota (TRQ) for poultry meat by an additional 55 000 metric tonnes, bringing the total TRQ to 355 000 metric tonnes.
	May-19	All	Trade tariff lifted	Lifted tariffs on US bovine and pig meat, in response to the removal of tariffs imposed by the United States on steel and aluminium imports from Mexico.
The Philippines	Sep-19	Pig meat	Import ban	Suspended pig meat imports from the Republic of Korea, Myanmar and Serbia due to concerns over ASF, following bans by many countries for the same reason at different times including Belgium, Bulgaria, China, Czechia, Germany, Hungary, Democratic People's Republic of Korea, the Lao People's Democratic Republic, Latvia, Moldova, Mongolia, Poland, Romania, the Russian Federation, South Africa, Ukraine, Viet Nam and Zambia.
	Apr-19	Poultry meat	Trade agreement	Agreed with China to buy each other's poultry and related products.
Russian Federation	May-19	All	Market access	Confirmed that 26 meatpacking plants were approved by China, Hong Kong SAR to export pig meat and bovine meat to the country.
	Jun-19	All	Import ban extended	Extended until the end of 2020 the ban on the import of agricultural products, including meat, from countries that applied economic sanctions against the Russian Federation.
	Aug-19	Bovine meat	Market access	Granted market access for one Brazilian firm to supply bovine meat products to its market, by signing the veterinary certificates.
Saudi Arabia	Aug-19	Pig meat	Import ban	Banned imports of pig meat from Serbia following news that ASF had reached the Balkan country for the first time.
	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 and the Russian Federation, as these countries have been free of highly pathogenic avian flu for at least three months.
Serbia	Aug-19	Pig meat	Export ban	Halted pig meat exports to Bosnia and Herzegovina, North Macedonia and Montenegro due to reported cases of ASF.
Singapore	Jul-19	Poultry meat	Market access	Authorized imports of frozen poultry meat from the Russian Federation, following recognition that avian flu is present in only one region of the country.
South Africa	Jul-19	Bovine meat	Market access	Resumed bovine meat exports to China, following the removal of a ban imposed on its exports due to an outbreak of FMD in January.
Thailand	Jun-19	Pig meat	Import ban	Banned imports of live pigs and wild boars from the Lao People's Democratic Republic for 90 days, after the country confirmed its first case of ASF.
	Aug-19	Pig meat	Import ban	Banned imports of live pigs and wild boars from Myanmar for 90 days, after the country confirmed its first case of ASF.
United States of America	Apr-19	All	Market access	Finalized export certificates with the Government of Tunisia, allowing exports of bovine, poultry meat and egg products.

COUNTRY	DATE	PRODUCT	POLICY INSTRUMENT	DESCRIPTION
Ukraine	Aug-19	Poultry meat	Market access	Obtained formal approval to export poultry meat to Japan for the first time after the two countries agreed on required veterinary certificates.
	Aug-19	Poultry meat	Trade agreement	Ratified a trade agreement with Israel including tariff-rate quota for poultry meat exports.
Viet Nam	Sep-19	All	Market access	Authorized imports of meat from Lithuania after Vietnamese inspectors gave a positive assessment of control systems in the Baltic country.

* 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 (thousand tonnes - carcass weight equivalent)

	Production		Imports		Exports		Utilization	
	2018 <i>estim.</i>	2019 <i>f'cast</i>	2018 <i>estim.</i>	2019 <i>f'cast</i>	2018 <i>estim.</i>	2019 <i>f'cast</i>	2018 <i>estim.</i>	2019 <i>f'cast</i>
ASIA	141 518	134 770	18 208	20 198	4 695	4 828	154 998	150 143
China	87 014	79 972	5 482	7 385	637	597	91 879	86 760
India	7 463	7 508	1	2	1 472	1 534	5 993	5 975
Indonesia	3 334	3 430	214	267	6	6	3 541	3 690
Iran, Islamic Republic of	3 073	3 129	197	198	56	53	3 214	3 273
Japan	4 022	4 081	3 687	3 746	19	19	7 701	7 801
Korea, Republic of	2 513	2 585	1 493	1 514	43	50	3 871	4 020
Malaysia	2 008	2 032	342	339	67	67	2 283	2 305
Pakistan	3 784	3 925	26	29	57	62	3 753	3 892
Philippines	3 576	3 720	628	622	6	9	4 199	4 332
Saudi Arabia	996	1 018	866	864	78	86	1 783	1 796
Singapore	117	116	367	381	56	40	428	457
Thailand	2 836	2 912	32	29	1 304	1 440	1 572	1 539
Turkey	3 721	3 838	67	19	531	548	3 276	3 310
Viet Nam	5 273	4 710	1 599	1 523	28	18	6 845	6 215
AFRICA	19 165	19 188	2 992	3 003	255	246	21 902	21 946
Algeria	734	740	63	62	2	2	796	801
Angola	301	313	541	500	-	-	842	812
Egypt	2 228	2 286	334	364	8	6	2 553	2 644
Nigeria	1 423	1 421	3	3	1	1	1 425	1 423
South Africa	3 210	3 160	641	637	137	128	3 713	3 669
CENTRAL AMERICA	10 170	10 433	3 609	3 682	725	809	13 054	13 305
Cuba	387	398	419	423	-	-	806	821
Mexico	7 002	7 217	2 231	2 288	473	548	8 760	8 957
SOUTH AMERICA	44 213	45 354	1 287	1 398	8 897	9 844	36 603	36 908
Argentina	5 878	6 141	85	79	748	1 035	5 215	5 184
Brazil	27 692	28 610	58	46	6 942	7 567	20 809	21 089
Chile	1 515	1 559	683	764	376	449	1 822	1 875
Colombia	2 799	2 722	230	270	28	24	3 000	2 967
Uruguay	663	637	79	92	438	434	304	295
NORTH AMERICA	51 885	53 185	2 930	2 855	9 823	10 219	44 982	45 792
Canada	4 930	5 083	739	707	1 926	2 007	3 733	3 794
United States of America	46 954	48 101	2 178	2 134	7 896	8 212	41 235	41 984
EUROPE	64 890	65 548	2 991	3 067	6 258	6 928	61 636	61 680
Belarus	1 234	1 211	58	64	426	414	866	861
European Union	48 881	49 296	1 439	1 496	5 017	5 614	45 303	45 178
Russian Federation	10 677	10 865	806	801	321	345	11 174	11 314
Ukraine	2 374	2 439	172	175	384	455	2 163	2 159
OCEANIA	6 739	6 736	489	534	3 138	3 167	4 090	4 103
Australia	4 766	4 759	247	286	2 101	2 122	2 913	2 923
New Zealand	1 403	1 406	82	84	1 033	1 041	451	450
WORLD	338 579	335 214	32 507	34 738	33 790	36 042	337 263	333 877
LIFDC	25 828	25 308	3 006	2 945	1 700	1 751	27 134	26 501
LDC	13 148	13 124	1 482	1 491	39	39	14 591	14 577

Notes:

Meat aggregates have been standardized to comply with FAO statistical methods for calculating meat categories.

Total meat includes "other meat".

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

	Production		Imports		Exports		Utilization	
	2018 <i>estim.</i>	2019 <i>f'cast</i>	2018 <i>estim.</i>	2019 <i>f'cast</i>	2018 <i>estim.</i>	2019 <i>f'cast</i>	2018 <i>estim.</i>	2019 <i>f'cast</i>
ASIA	44 741	48 754	6 696	7 173	2 464	2 584	48 985	53 378
China	19 020	22 306	1 130	1 513	454	448	19 696	23 371
India	3 707	3 744	-	-	7	7	3 700	3 737
Indonesia	2 290	2 380	-	-	2	2	2 288	2 378
Iran, Islamic Republic of	2 196	2 233	-	-	52	48	2 144	2 186
Japan	2 246	2 293	1 325	1 337	10	10	3 571	3 627
Korea, Republic of	900	927	186	204	37	44	1 044	1 077
Kuwait	58	59	150	158	8	9	200	208
Malaysia	1 757	1 778	72	73	52	53	1 777	1 798
Saudi Arabia	729	749	652	650	37	44	1 343	1 355
Singapore	96	95	172	184	15	17	254	262
Thailand	1 777	1 850	2	2	1 135	1 274	652	616
Turkey	2 229	2 305	6	3	502	511	1 734	1 797
Yemen	147	126	91	99	-	-	238	225
AFRICA	5 927	5 955	2 066	2 074	92	99	7 902	7 930
Angola	40	41	329	301	-	-	369	342
South Africa	1 755	1 739	567	572	55	53	2 267	2 258
CENTRAL AMERICA	5 075	5 202	1 784	1 812	40	41	6 820	6 973
Cuba	34	36	286	293	-	-	320	329
Mexico	3 330	3 437	990	1 006	10	9	4 311	4 433
SOUTH AMERICA	21 575	22 107	366	378	4 423	4 705	17 518	17 780
Argentina	2 079	2 193	14	10	194	252	1 899	1 951
Brazil	13 931	14 235	3	4	4 050	4 248	9 885	9 991
Chile	766	793	152	153	167	193	752	753
NORTH AMERICA	23 883	24 459	353	340	4 017	4 044	20 215	20 734
Canada	1 486	1 525	194	190	164	159	1 509	1 556
United States of America	22 396	22 934	154	145	3 853	3 885	18 701	19 173
EUROPE	21 902	22 461	1 286	1 331	2 375	2 525	20 825	21 259
European Union	15 248	15 629	736	779	1 652	1 727	14 331	14 682
Russian Federation	4 448	4 502	215	212	197	199	4 479	4 508
Ukraine	1 276	1 381	134	133	331	404	1 079	1 110
OCEANIA	1 515	1 543	102	104	81	84	1 536	1 564
Australia	1 260	1 289	15	14	44	49	1 231	1 254
New Zealand	220	219	1	1	37	34	184	186
WORLD	124 618	130 480	12 652	13 212	13 491	14 081	123 800	129 618
LIFDC	6 770	6 900	1 858	1 880	10	10	8 618	8 770
LDC	3 256	3 252	1 129	1 146	2	6	4 383	4 392

Note: Meat aggregates have been standardized to comply with FAO statistical methods for calculating meat categories.