



MEAT MARKET REVIEW

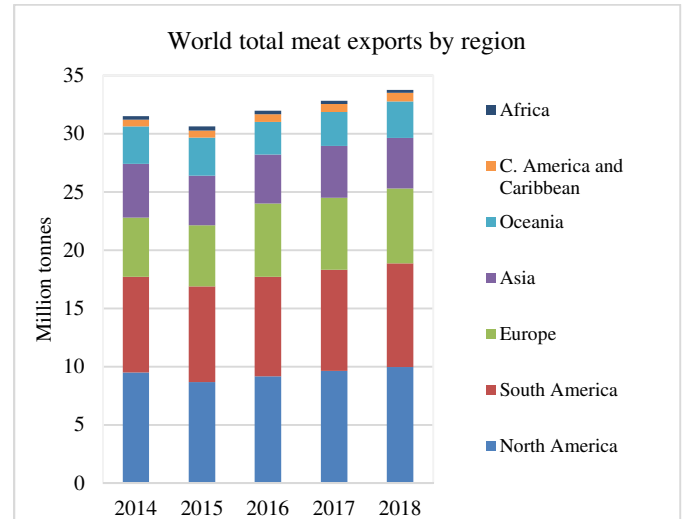
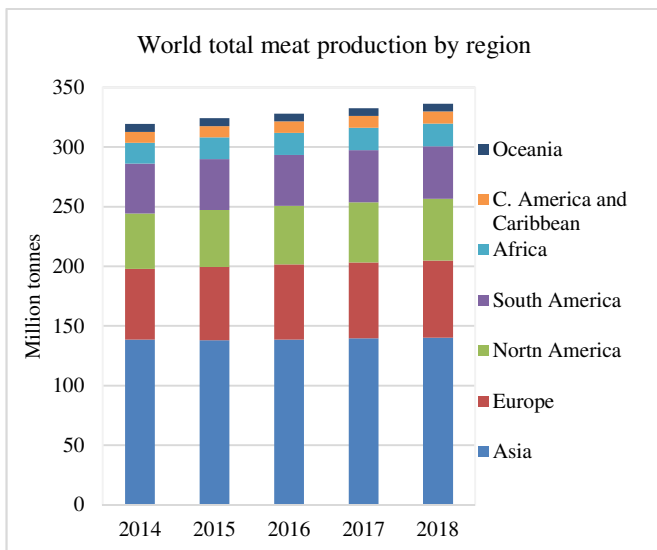
Overview of global meat market developments in 2018

Global meat output in 2018 is estimated at 336.4 million tonnes, up 1.2 percent from 2017, principally originated in the **United States of America**, the **European Union**, and the **Russian Federation**, but partially offset by a decline in **China** and stagnation in **Brazil**, two of the world's largest meat producers. Meat output volumes expanded in all major regions in the world, especially in Europe and North America, principally due to productivity improvements, as countries introduced good management practices, streamlined production processes and new technology. Moreover, droughts in some parts of the world, including in the United States of America in the first half of the year, in the European Union during the summer months, and Australia almost throughout the year, led to higher animal slaughter.

Across the various meat sub-sectors, bovine meat output (refer to meat derived from ruminant mammals including cows, ox and buffalos) registered the highest expansion (+2.1 percent), followed by poultry meat (+1.3 percent), but outputs remained stable for ovine meat (meat derived from sheep and goats) (+0.6 percent) and pigmeat (+0.6 percent).

increased shipments from the **United States of America**, **Australia**, **Argentina** and the **European Union**, but retreated in **India**, **China** and **Brazil**.

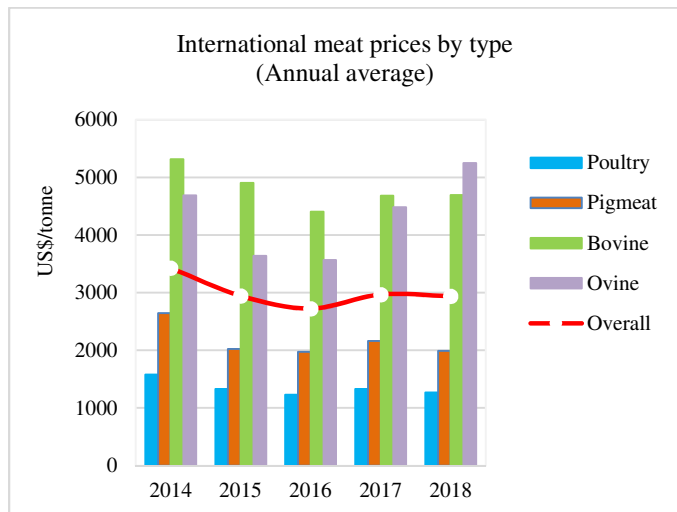
China, the world's largest meat importer, increased its purchases significantly, as consumer demand for meat continued to rise amid a contraction in pigmeat output, partly due to the onset of the African swine fever. Elsewhere, imports increased in the **Republic of Korea**, and **Viet Nam**, while the **Russian Federation**, **Saudi Arabia** and the **United States of America** have cut back on imports. Across meat categories, world meat exports expanded at faster rates for ovine (+9.4 percent) and bovine (+6.1 percent) than for pigmeat (+1.6 percent) and poultry (+1.0 percent).



World meat exports in 2018 is estimated at 33.8 million tonnes, up 2.9 percent from 2017, principally driven by

The annual average value of **world meat prices** in 2018, measured by the FAO Meat Price Index, was 2.2 percent lower than in 2017, reflecting the declines in prices of pig (-8.1 percent) and poultry (-4.8 percent) meats and stability of bovine meat prices (+0.2 percent). Ovine meat prices increased by as much as 17 percent, but did not affect the average index value significantly because of its low weightage in the index. The spread of the African Swine Fever (ASF) and associated import restrictions weighed on international pigmeat price quotations while

generally sluggish poultry import demand caused its prices to weaken. Abundant export supplies and robust demand from across the world characterized the global bovine meat market, keeping its prices stable. Price strength of ovine meat during the whole year was a result of strong import demand, combined with limited supplies from Oceania.



Poultry meat

World poultry meat output increased by 1.3 percent in 2018 to 123.9 million tonnes, as productions expanded in the **United States of America**, the **European Union**, **India** and **China**, among others, but offset by declines in **Brazil** and **Argentina**. Production also continued to expand, though slowly, in several other large poultry meat producing countries, including **Mexico**, the **Russian Federation**, **Turkey** and **Japan**.

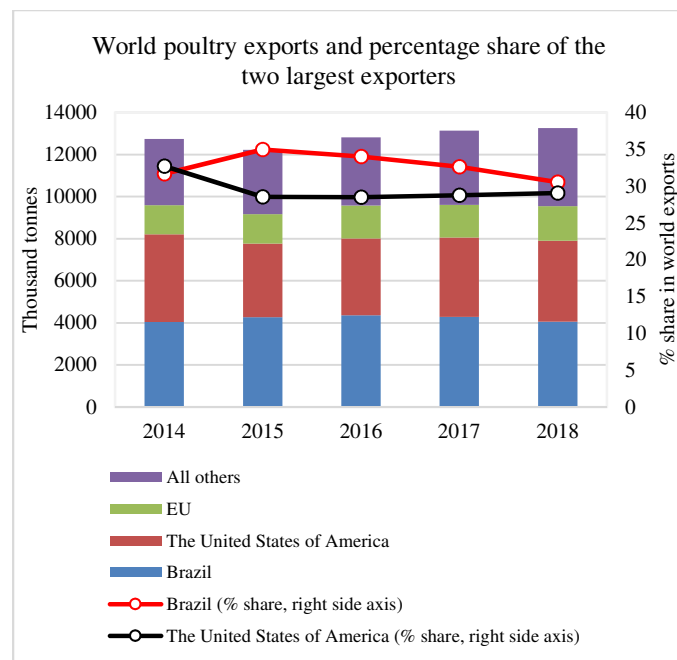
In the **United States of America**, increases in both the number of poultry birds slaughtered and slaughter weight contributed to register 1.6 percent growth in output to 22.3 million tonnes in 2018. **European Union's** poultry output increased by 1.2 percent in 2018, as the region was able to overcome the impact of the spread of the highly pathogenic avian influenza (HPAI) that led to a stagnation of output in 2017. Domestic production also received a boost from the import limitation that the European Union imposed on the number of processors from Brazil. Additional support to production also received from Eastern European countries such as Hungary, Poland and Romania, as they realized sustained productivity improvements, gained through higher investments.

Driven by demand from increasingly urbanized population with higher incomes and changing food habits, **India's** poultry meat production has been rising at an annual average of about 5 percent in recent years. In 2018, output is estimated at 3.7 million tonnes, of which over 80

percent is estimated to have come from the organized sector, which benefited from relatively low soymeal prices and remunerative producer prices. After a slight decline in 2017, **China's** poultry meat output expanded to 19 million tonnes in 2018, 0.4 percent more than in 2017, backed by the containment of the spread of HPAI and a reduction of feed costs, resulting from the drawdown of grain stocks. The sector also benefitted from improvements to grandparent stock, as China imported genetic materials, especially from New Zealand, and developed its own indigenous breeding operations.

By contrast, poultry output fell in **Brazil** by 1.9 percent in 2018, to nearly 13.9 million tonnes, mostly on account of the loss of export markets, although output remained slightly above that of the level in 2016. In the **Russian Federation**, poultry meat output expanded to 4.5 million, up 1.4 percent, a smaller growth rate compared to 7.3 percent in 2017. A slow pace of growth in consumer demand and weak prices have been the main causes for relatively slow growth in 2018.

World poultry meat exports rose to 13.3 million tonnes in 2018, an increase of 1.0 percent from 2017, compared to 4.9 percent and 2.4 percent growth rates, respectively, in 2015 and 2016. Poultry exports from the **European Union**, **Thailand**, the **United States of America**, **Turkey** and **Ukraine**, among others, continued to increase, but sharply contracted in **Brazil** and **China**, partially offsetting the gains.



After a contraction in 2017, **European Union's** poultry exports rebounded by 6.4 percent, sustained by abundant supplies and induced by higher import demand, especially

from Ghana, Ukraine, the Philippines and South Africa. The **United States of America** also benefitted from increased export availabilities and continued strong demand from its traditional partners, especially Mexico, but also Angola, Taiwan province of China, Guatemala and the Philippines. **Thailand's** poultry exports expanded, underpinned by increased imports by Japan and the European Union, but also other Asian markets such as the Republic of Korea and Malaysia. In addition to fully utilizing export volumes offered under tariff quota regimes as in the European Union, Thai poultry export expansion reflected its global outreach, increased efforts to meet global antimicrobial standards and improvements to animal welfare. Despite sharp falls in imports by some trading partners, **Turkey's** exports expanded, as Iraq and Libya placed more import orders while shipments to its traditional destinations continued. Poultry production growth, however, slowed down because of increased feed costs amid limited availability of locally made feed varieties. Poultry exports from **Ukraine** thrived in 2018, with a 21 percent expansion, driven by import demand for its high value poultry cuts, especially by the European Union and the Middle East.

By contrast, **Brazil's** exports declined by 5.5 percent in 2018, resulting from the 'weak meat scandal' and the loss of export opportunities due to the stringent halal slaughter requirements imposed by Saudi Arabia on meat imports. Notwithstanding this decline, Brazil remained the world's leading poultry exporter with over 4 million tonnes of exports worldwide. In 2018, **China's** poultry exports fell by nearly one-fifth, mostly reflecting higher internal demand. The **Russian Federation**, the fifth largest poultry producer in the world, realized 11 percent growth in 2018, to 195 000 tonnes, with significant expansions to Viet Nam, Ukraine and its neighbouring countries.

Overall poultry meat imports increased globally. At country level, however, imports had dramatic shifts with sharper increases in **Viet Nam, Ghana, Angola** and the **Republic of Korea** and similarly sharp decreases elsewhere, especially in **Egypt, China** and **Saudi Arabia**.

Ghana's imports rose as growth in domestic production was inadequate to meet increases in consumer demand, whereas in **Viet Nam**, low international prices was the main driver. **Saudi Arabia's** decline in imports was a result of the imposition of strict halal standards on imported poultry meat.

Bovine meat

World bovine meat output rose to 71.1 million tonnes in 2018, up 2.1 percent from 2017, principally originated in

five countries: **Brazil**, the **United States of America**, **Argentina**, the **European Union** and **Australia**. Outputs also increased in **Australia, China, Mexico, Canada** and **South Africa**, but declined in **Turkey** and **Uruguay**.

Brazil's bovine meat output increased by 4.0 percent in 2018 to 9.9 million tonnes. This expansion was mainly fuelled by higher animal slaughter, mostly heifers, and a rise in import demand, induced by competitive prices it offered in international markets. During the year, some meat processors began relocating the processing plants closer to cattle rearing regions to reduce processing and transportation costs, and improving the feeding efficiency. In the **United States of America**, bovine meat output expanded mainly on account of increased dressed weight of both steers and heifers, but also due to elevated levels of slaughter, induced by drier weather conditions in some parts of the country, helping the sector to maintain the growth momentum for a third year. **Argentina's** bovine meat production increased to slightly over 3 million tonnes, up 7.3 percent from 2017, maintaining the same rate of growth as in the previous year. The consistency in its production expansion reflects the stability of the industry and continued import demand, backed by new policy of the government that restricted the slaughter of lighter-weight cattle. In the **European Union**, increased slaughter, induced by drought that affected parts of Europe in the summer months, was largely behind the output expansion. In **Australia**, meat output is estimated to have increased by 7.3 percent to 2.3 million tonnes, registering a sharp growth in 2018. Drier weather conditions forced farms to use more feed, prompting elevated slaughter rates throughout the year. Weaker Australian dollar against the United States dollar provided a boost to import demand. Additional support also came from import demand from countries where ASF spread was an issue, as consumers there appeared to have substituted more bovine meat for pigmeat. Elsewhere, bovine meat output remained largely stable, including **China, India** and the **Russian Federation**.

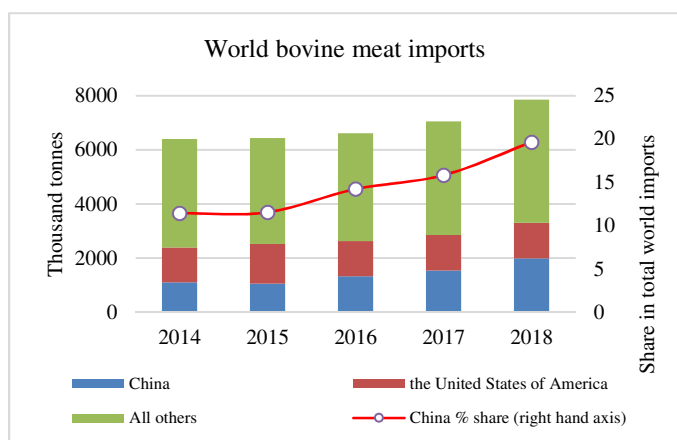
In **China**, while the government's policy stance in recent years has been to promote large scale farms and relocate farms to identified areas to minimize their impact on the environment, smallholders continued to retreat from the industry due to rising costs, including costs to comply with strict environmental regulations. In **India**, output growth appeared to have slowed down, following the introduction of laws restricting cow slaughter, effective in 23 out of 29 states, and difficulties in transporting animals. In the **Russian Federation**, beef output remained largely stable, on limited increase in domestic demand. High beef

prices weakened domestic demand growth, which, in turn, led large-scale farms to limit production expansions.

World bovine meat exports in 2018 increased by 6.1 percent, to 10.9 million tonnes. **Argentina, Brazil, Australia** and the **United States of America** were largely behind the expansion, partially offset by declines in **India** and the **European Union**.

Argentina's bovine meat exports expanded vigorously, as several countries, especially China, placed higher import orders. A strong support for the expansion came from competitive prices Argentina offered in international markets, backed by high production and export availabilities. In **Brazil**, exports expanded by 11.3 percent, thanks to increased import orders from China, Egypt and Chile, among others, more than compensating for a loss of one of the key export markets, the Russian Federation. Brazilian bovine meat exports to the Russian Federation declined from 179 000 to 4 700 tonnes in 2018, a year-on-year drop of 97 percent. **Australia's** bovine meat exports rose by 11.8 percent in 2018, reflecting sharper import expansion in Japan, the United States of America, the Republic of Korea and China, which collectively absorbed 80 percent of Australian bovine meat exported in 2018.

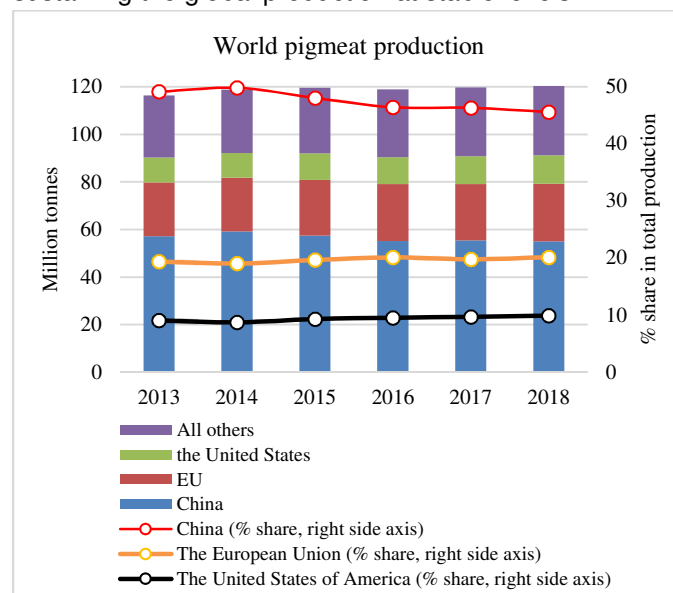
Bovine meat imports of **China** rose by 29.3 percent to 2.0 million tonnes, equivalent to one-fifth of total world exports, mainly because of rising consumer demand. Bovine meat imports also expanded in the **Republic of Korea, Japan, Indonesia, Chile** and the **European Union**, whereas **Viet Nam, Egypt, the Russian Federation** and **Angola** cut back on purchases.



Pigmeat

World pigmeat output in 2018 is estimated at 120.5 million tonnes, an increase of 0.6 percent from 2017, registering a marginal growth. While **China's** decline in output was largely behind the global stagnation, its output

was still 46 percent of the world total. Outputs also declined in **Brazil, Viet Nam** and **Ukraine**, collectively shedding nearly 293 000 tonnes of pigmeat. However, outputs expanded in the **European Union, the United States of America** and the **Russian Federation**, sustaining the global production at stable levels.



In **China**, pigmeat output contraction was not entirely unanticipated, given the onset of the African Swine Fever (ASF), which, by the end of December, involved 105 cases and resulted the culling of over 950 000 pigs. The sector was on the path to recovery until the ASF spread began, although some concerns were ripe on escalating feed costs due to rising soybean prices in view of the increased reliance on animal compound feeds under the industrial production system and the trade dispute that led to higher tariffs on imported soybean from the United States of America. In **Brazil**, pigmeat production was about 3 percent lower than in 2017. In the earlier part of the year, production suffered due to loss of import demand on account of the 'weak-flesh' food-safety probe. Subsequently, the truck drivers' strike disrupted feed supplies from other parts of Brazil and the transportation of animals and meat to markets. In addition, maize prices increased by over 50 percent while producer prices declined, further undermining producer incentives. **Viet Nam's** pigmeat production is estimated to have declined by 2.4 percent in 2018, resulting from some market instability in the last few years. Following several years of production expansion, a situation of over-supply arose, plummeting pigmeat prices in 2017, which led to income losses for pig farmers. In response, farmers scaled down herd stocks. In 2018, however, following the warnings of the ASF outbreak in the European Union, the government suspended imports, pushing market prices up by nearly 200 percent by mid-2018, compared to the same period

in 2017. In **Ukraine**, pigmeat output declined for a third consecutive year, caused by a number of factors: reduction of saw numbers due to low profitability, the spread of the ASF, reduction in consumer demand in view of low consumer purchasing power, a reduction in government support and loss of foreign markets.

By contrast, output expanded in the **European Union**, the **United States of America** and the **Russian Federation**. In the **European Union**, following a contraction in 2017, pigmeat output rebounded by 2.5 percent to 24.3 million tonnes in 2018, underpinned by favourable domestic prices that led to an increase in breeding-pig herd. Since mid-2018, however, prices began weakening amid reduction in import orders. Pigmeat output in the **United States of America** is estimated to have increased by 2.9 percent to nearly 12 million tonnes in 2018. Increased slaughter numbers on the back of an enlarged inventory, estimated at 75.5 million pigs as of 1 September, the largest inventory recorded since 2009, was mainly behind the higher output. In the **Russian Federation**, pigmeat output is estimated at 3.8 million tonnes, up nearly 8 percent in 2018, confirming the steady growth of the sector in recent years. Rising contribution of large-scale farms that are well integrated with other farming activities, including maize production, was a major factor.

World pigmeat exports are estimated at 8.4 million tonnes in 2018, up by 1.6 percent year-on-year. This was a result of increased exports by the **United States of America**, the **European Union**, **Chile** and **Mexico**, partially offset by export contractions in **Brazil**, **Canada** and **Viet Nam**. Much of the expanded trade was due to increased purchases by the **Republic of Korea**, **Mexico**, **Colombia** and the **Philippines**.

Expansion of pigmeat exports from the **United States of America** was a result of abundant export availabilities, competitive prices and continued stability of imports by Mexico and Japan and increased sales to the Republic of Korea and Colombia, compensating for reduced sales to China, among others. **European Union's** pigmeat exports increased, partially recovering from a dip in exports in 2017 (-8.4 percent), resulting from the resilience of the sector, as the European Union managed to balance sharp import curtailment from China by expanding exports to alternative destinations, including Japan, the Republic of Korea, the United States of America and the Philippines. Pigmeat exports from **Chile** and **Mexico**, although remained under 200 000 tonnes, expanded significantly in 2018, as they received increased market access in China, Japan, the Republic of Korea, the Russian Federation and the United States of

America. By contrast, pigmeat exports from **Brazil** declined by nearly 6 percent. Following a ban imposed by the Russian Federation, Brazil's exports to that country declined from 325 000 in 2017 to just about 8 600 tonnes in 2018, a drop of 97 percent. This was, however, offset by increased exports to alternative destinations, particularly to China, Singapore, Argentina, Uruguay and Chile. **Canada's** pigmeat exports marginally declined, resulting from reduced exports to the United States of America and China. The decline in pigmeat sales by **Viet Nam** resulted from reduced pigmeat production.

Global pigmeat imports in 2018 dominated by **China**, **Japan**, **Mexico**, the **Republic of Korea** and the **United States of America**, which collectively imported 70 percent of global exports.

While still the largest pigmeat importer in the world, **China's** imports declined by 8.5 percent, further curtailing its imports from the peak in 2016. **Japan's** pigmeat imports remained steady, at the same level as in 2017. In the **Republic of Korea**, popularity of pigmeat continued to drive increases in imports, mainly from the United States of America, the European Union and Canada. Imports by the **Russian Federation** decreased by as much as 72 percent, mainly resulting from its restrictions placed on meat imports and rising domestic production.

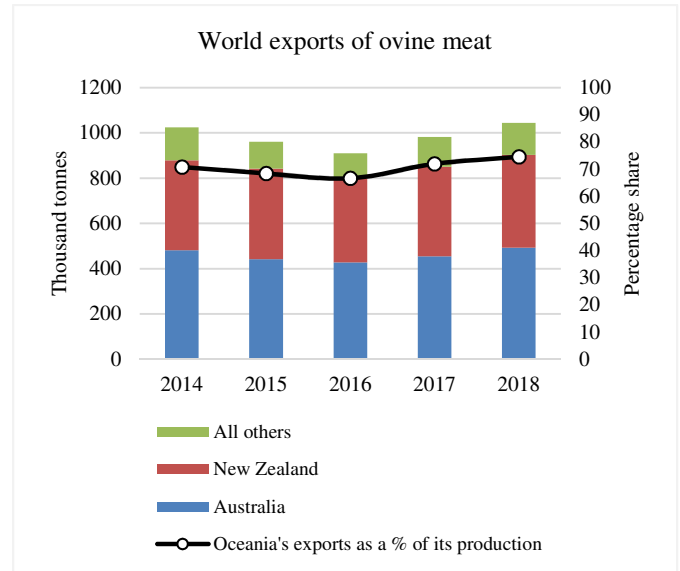
Ovine meat

World ovine meat output is estimated at 15.2 million tonnes in 2018, up 0.6 percent from 2017, principally driven by increases in **China**, **Australia**, but offset by a small decline in the **European Union**.

China's ovine meat production rose in 2018, underpinned by large-scale farms that use extensive feeding systems, more than offsetting reductions in the household and small-scale sector. In 2018, drought conditions that affected northeastern parts of China also led to an increased offtake. In **Australia**, dryer conditions across many sheep rearing regions and high feed costs forced higher offtake of animals, especially during the second half of the year. **New Zealand's** output remained stable amid a smaller sheep flock, compensated for by improved productivity and a small gain in carcass weight. Ovine meat output in the **European Union** declined, as some member states suffered from erratic weather that went from cold and wet spring to hot and dry summer.

World ovine meat exports expanded by 6.3 percent to just over one million tonnes in 2018. A solid import demand in **China**, the **Iran (Islamic Republic of)**, the **United States of America**, **Japan** and **Qatar**, which more than offset a small decline in **Canada** and **Saudi**

Arabia, was behind the expansion. Nearly all the expanded volume of exports in 2018 originated from **Australia**, with a small expansion from **New Zealand**.



Statistical Appendix

1. FAO Meat Price Indices

| PERIOD | Sub-indices | | | | FAO Meat Price Index |
|--------------------|-------------|------------|----------|--------------|----------------------|
| | Bovine meat | Ovine meat | Pig meat | Poultry meat | (2002-2004=100) |
| Annual | | | | | |
| (January/December) | | | | | |
| 2010 | 165 | 158 | 138 | 179 | 158 |
| 2011 | 191 | 232 | 153 | 206 | 183 |
| 2012 | 195 | 205 | 153 | 201 | 182 |
| 2013 | 197 | 178 | 157 | 206 | 184 |
| 2014 | 231 | 202 | 164 | 200 | 198 |
| 2015 | 213 | 157 | 126 | 168 | 168 |
| 2016 | 191 | 154 | 123 | 156 | 156 |
| 2017 | 204 | 194 | 135 | 169 | 170 |
| Monthly | | | | | |
| 2018 – January | 208 | 215 | 125 | 161 | 167 |
| 2018 – February | 209 | 215 | 131 | 162 | 170 |
| 2018 – March | 209 | 222 | 131 | 164 | 171 |
| 2018 – April | 207 | 222 | 128 | 168 | 170 |
| 2018 – May | 208 | 219 | 124 | 166 | 169 |
| 2018 – June | 204 | 230 | 124 | 160 | 167 |
| 2018 – July | 203 | 231 | 122 | 160 | 165 |
| 2018 – August | 201 | 236 | 126 | 160 | 167 |
| 2018 – September | 199 | 239 | 121 | 157 | 164 |
| 2018 – October | 197 | 229 | 117 | 155 | 160 |
| 2018 – November | 201 | 234 | 117 | 157 | 163 |
| 2018 – December | 202 | 228 | 119 | 159 | 164 |

The FAO Meat Price Indices consist of 2 poultry meat product quotations (the average weighted by assumed fixed trade weights), 3 bovine meat product quotations (average weighted by assumed fixed trade weights), 3 pigmeat product quotations (average weighted by assumed fixed trade weights), 1 ovine meat product quotation (average weighted by assumed fixed trade weights): the four meat group average prices are weighted by world average export trade shares for 2002/2004.

2. Meat production and international trade

| Total meat production (thousand tonnes, CWE) | | | |
|---|----------------|----------------|---------------------------|
| | 2017 | 2018 | Change 2018 over 2017 (%) |
| World | 332 464 | 336 369 | 1.2 |
| China | 86 887 | 86 598 | -0.3 |
| EU 28 | 48 163 | 49 084 | 1.9 |
| United States | 45 772 | 46 768 | 2.2 |
| Brazil | 27 586 | 27 579 | 0.0 |
| Russian Fed. | 9 900 | 10 248 | 3.5 |
| India | 7 256 | 7 424 | 2.3 |
| Mexico | 6 822 | 7 028 | 3.0 |
| Argentina | 5 756 | 5 953 | 3.4 |

| Poultry production (thousand tonnes, CWE) | | | |
|--|----------------|----------------|---------------------------|
| | 2017 | 2018 | Change 2018 over 2017 (%) |
| World | 122 355 | 123 934 | 1.3 |
| United States | 21 914 | 22 265 | 1.6 |
| China | 18 915 | 18 987 | 0.4 |
| EU 28 | 14 609 | 14 784 | 1.2 |
| Brazil | 14 201 | 13 931 | -1.9 |
| Russian Fed. | 4 444 | 4 506 | 1.4 |
| India | 3 544 | 3 707 | 4.6 |
| Mexico | 3 249 | 3 340 | 2.8 |
| Indonesia | 2 301 | 2 290 | -0.5 |
| Turkey | 2 192 | 2 253 | 2.8 |

| Total meat imports (thousand tonnes, CWE) | | | |
|--|---------------|---------------|---------------------------|
| | 2017 | 2018 | Change 2018 over 2017 (%) |
| World | 31 539 | 32 287 | 2.4 |
| China | 5 208 | 5 400 | 3.7 |
| Japan | 3 635 | 3 721 | 2.3 |
| Mexico | 2 167 | 2 276 | 5.0 |
| United States | 2 195 | 2 176 | -0.9 |
| Viet Nam | 1 445 | 1 598 | 10.6 |
| Rep. of Korea | 1 317 | 1 505 | 14.3 |
| EU 28 | 1 285 | 1 311 | 2.0 |
| Saudi Arabia | 970 | 887 | -8.5 |
| Russian Fed. | 1 206 | 868 | -28.0 |

| Poultry imports (thousand tonnes, CWE) | | | |
|---|---------------|---------------|---------------------------|
| | 2017 | 2018 | Change 2018 over 2017 (%) |
| World | 12 310 | 12 549 | 1.9 |
| Japan | 1 291 | 1 324 | 2.5 |
| China | 1 283 | 1 130 | -11.9 |
| Mexico | 978 | 989 | 1.2 |
| EU 28 | 725 | 723 | -0.4 |
| Viet Nam | 373 | 709 | 90.3 |
| Saudi Arabia | 725 | 638 | -12.0 |
| South Africa | 557 | 567 | 1.7 |

| Total meat exports (thousand tonnes, CWE) | | | |
|--|---------------|---------------|---------------------------|
| | 2017 | 2018 | Change 2018 over 2017 (%) |
| World | 32 833 | 33 787 | 2.9 |
| United States | 7 723 | 8 047 | 4.2 |
| Brazil | 7 023 | 6 946 | -1.1 |
| EU 28 | 4 996 | 5 131 | 2.7 |
| Australia | 1 905 | 2 106 | 10.5 |
| Canada | 1 919 | 1 922 | 0.1 |
| India | 1 736 | 1 472 | -15.2 |
| Thailand | 1 113 | 1 216 | 9.3 |
| New Zealand | 991 | 1 038 | 4.8 |

| Poultry exports (thousand tonnes, CWE) | | | |
|---|---------------|---------------|---------------------------|
| | 2017 | 2018 | Change 2018 over 2017 (%) |
| World | 13 132 | 13 262 | 1.0 |
| Brazil | 4 284 | 4 050 | -5.5 |
| United States | 3 774 | 3 852 | 2.1 |
| EU 28 | 1 546 | 1 644 | 6.4 |
| Thailand | 1 051 | 1 135 | 8.1 |
| Turkey | 437 | 502 | 14.9 |
| China | 426 | 332 | -22.0 |
| Ukraine | 274 | 331 | 21.0 |

| Bovine production (thousand tonnes, CWE) | | | |
|---|---------------|---------------|---------------------------|
| | 2017 | 2018 | Change 2018 over 2017 (%) |
| World | 69 614 | 71 083 | 2.1 |
| United States | 11 943 | 12 254 | 2.6 |
| Brazil | 9 550 | 9 932 | 4.0 |
| EU 28 | 7 867 | 8 032 | 2.1 |
| China | 6 361 | 6 457 | 1.5 |
| Argentina | 2 842 | 3 049 | 7.3 |
| India | 2 524 | 2 536 | 0.5 |
| Australia | 2 149 | 2 306 | 7.3 |
| Mexico | 1 927 | 1 979 | 2.7 |

| Pigmeat production (thousand tonnes, CWE) | | | |
|--|----------------|----------------|---------------------------|
| | 2017 | 2018 | Change 2018 over 2017 (%) |
| World | 119 766 | 120 530 | 0.6 |
| China | 55 449 | 54 956 | -0.9 |
| EU 28 | 23 686 | 24 278 | 2.5 |
| United States | 11 611 | 11 948 | 2.9 |
| Russian Fed. | 3 530 | 3 805 | 7.8 |
| Viet Nam | 3 733 | 3 643 | -2.4 |
| Brazil | 3 685 | 3 567 | -3.2 |
| Canada | 2 142 | 2 144 | 0.1 |
| Philippines | 1 837 | 1 881 | 2.4 |
| Mexico | 1 442 | 1 504 | 4.3 |

| Bovine imports (thousand tonnes, CWE) | | | |
|--|--------------|---------------|---------------------------|
| | 2017 | 2018 | Change 2018 over 2017 (%) |
| World | 9 740 | 10 142 | 4.1 |
| China | 1 541 | 1 993 | 29.3 |
| United States | 1 314 | 1 315 | 0.1 |
| Japan | 824 | 869 | 5.4 |
| Viet Nam | 1 037 | 809 | -22.0 |
| Rep. of Korea | 488 | 533 | 9.3 |
| Russian Fed. | 523 | 491 | -6.2 |
| EU 28 | 305 | 333 | 9.1 |
| Chile | 264 | 298 | 12.8 |

| Pigmeat imports (thousand tonnes, CWE) | | | |
|---|--------------|--------------|---------------------------|
| | 2017 | 2018 | Change 2018 over 2017 (%) |
| World | 8 237 | 8 253 | 0.2 |
| China | 2 102 | 1 924 | -8.5 |
| Japan | 1 481 | 1 487 | 0.4 |
| Mexico | 916 | 1 006 | 9.8 |
| Rep. of Korea | 654 | 761 | 16.3 |
| United States | 613 | 582 | -5.1 |
| Canada | 251 | 263 | 4.8 |
| Chile | 123 | 235 | 91.4 |
| Australia | 216 | 217 | 0.6 |

| Bovine exports (thousand tonnes, CWE) | | | |
|--|---------------|---------------|---------------------------|
| | 2017 | 2018 | Change 2018 over 2017 (%) |
| World | 10 242 | 10 870 | 6.1 |
| Brazil | 1 858 | 2 068 | 11.3 |
| United States | 1 487 | 1 629 | 9.5 |
| Australia | 1 357 | 1 517 | 11.8 |
| India | 1 708 | 1 445 | -15.4 |
| New Zealand | 540 | 575 | 6.6 |
| Argentina | 311 | 524 | 68.6 |
| Canada | 442 | 475 | 7.5 |
| EU 28 | 492 | 464 | -5.7 |

| Pigmeat exports (thousand tonnes, CWE) | | | |
|---|--------------|--------------|---------------------------|
| | 2017 | 2018 | Change 2018 over 2017 (%) |
| World | 8 231 | 8 366 | 1.6 |
| EU 28 | 2 846 | 2 916 | 2.4 |
| United States | 2 440 | 2 544 | 4.3 |
| Canada | 1 298 | 1 284 | -1.1 |
| Brazil | 856 | 804 | -6.2 |
| Chile | 162 | 190 | 17.0 |
| Mexico | 177 | 186 | 4.9 |
| China | 107 | 105 | -2.2 |

| Ovine production (thousand tonnes, CWE) | | | |
|--|---------------|---------------|---------------------------|
| | 2017 | 2018 | Change 2018 over 2017 (%) |
| World | 15 154 | 15 247 | 0.6 |
| China | 4 677 | 4 714 | 0.8 |
| EU 28 | 959 | 947 | -1.2 |
| Australia | 729 | 760 | 4.2 |
| India | 734 | 732 | -0.3 |
| Pakistan | 469 | 473 | 0.9 |
| New Zealand | 453 | 451 | -0.3 |
| Turkey | 401 | 400 | -0.1 |

| Ovine imports (thousand tonnes, CWE) | | | |
|---|------------|--------------|---------------------------|
| | 2017 | 2018 | Change 2018 over 2017 (%) |
| World | 968 | 1 059 | 9.4 |
| China | 276 | 348 | 26.1 |
| EU 28 | 140 | 140 | 0.2 |
| United States | 122 | 125 | 2.3 |
| UAE | 58 | 58 | 1.0 |
| Saudi Arabia | 45 | 42 | -6.9 |
| Iran (Isl. Rep. of) | 14 | 38 | 179.7 |
| Malaysia | 39 | 36 | -6.0 |
| Qatar | 28 | 29 | 6.1 |
| Japan | 22 | 25 | 10.7 |

| Ovine exports (thousand tonnes, CWE) | | | |
|---|------------|--------------|---------------------------|
| | 2017 | 2018 | Change 2018 over 2017 (%) |
| World | 982 | 1 044 | 6.3 |
| Australia | 454 | 493 | 8.6 |
| New Zealand | 396 | 409 | 3.3 |
| EU 28 | 30 | 25 | -14.7 |
| India | 23 | 19 | -17.7 |
| Ethiopia | 16 | 16 | -0.7 |
| Uruguay | 11 | 12 | 8.0 |
| Georgia | 4 | 7 | 48.3 |

Note: Following FAO definitions and data conventions, meat production refers to carcass weight. The data presented in this report include official, non-official and estimates at the time of writing the report.

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Previous reports are available at: <http://www.fao.org/economic/est/est-commodities/meat/meat-and-meat-products-update/en/>

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