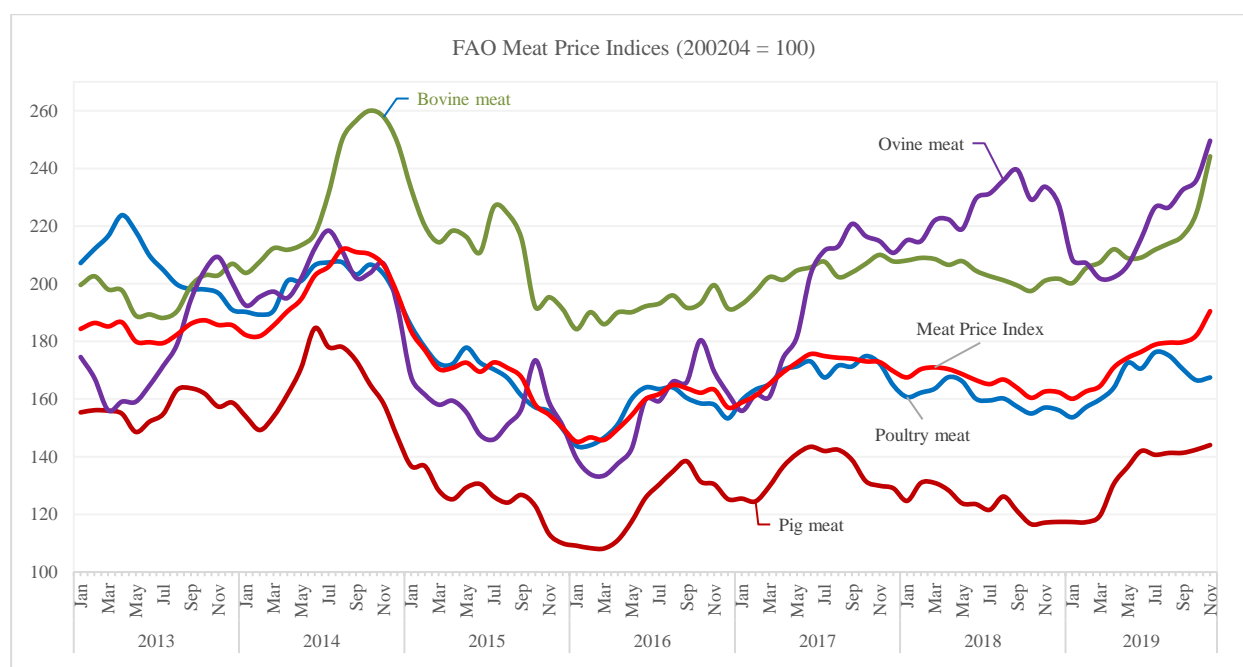


MEAT MARKET REVIEW

Price and policy update

Global meat price review

The **Meat Price Index** of the Food and Agriculture organization of the United Nations (FAO), which continued to rise moderately since February 2019, gained 30 points (19 percent) from January to November, but stood 21.5 points (10.1 percent) below the peak reached in August 2014. International quotations for all categories of meat represented in the index rose in 2019, with the highest percentage increase for pig meat (+22.7 percent), followed by bovine meat (+22.0 percent), ovine meat (+19.8 percent) and poultry meat (+9.0 percent).



The index for pig meat gained 26.7 points (22.7 percent) from January to November. However, the index value is still 40.5 points (22.0 percent) below the peak reached in August 2014. In 2019, the index rose rapidly from April to June, mainly driven by a surge in import demand from Asia, principally China, caused by a sharp fall in the country's pig meat production, associated with the spread of the African Swine Fever (AFS). Despite a 16 percent expansion in pig meat exports from the European Union, the largest exporter, it was not large enough to contain the price pressure given the magnitude of the production fall in Asia. Meanwhile, pig meat exports from the United States of America, the second largest exporter, declined by 2.3 percent during the same period, and those of Brazil expanded by 26 percent. In July, pig meat prices fell, as imports did not continue to expand as anticipated earlier. In China, pig meat imports expanded by 33.5 percent on average per month between March and May, but since then declined by 0.5 percent per month. The non-expansion in imports led to an inventory build-up, weighing on international prices, especially for supplies from Brazil. Supplies from the United States of America also remained high. Since August, pig meat prices stabilized at an elevated level. Supplies in Europe began rising in September, mostly on a seasonal increase in slaughter weight, while exports from the United States of America increased, especially with large orders from Mexico and China, providing support to price steadiness.

The index for bovine meat increased by 44 points (22.0 percent) between January and November, but the index remained 15.8 points (6.1 percent) below the peak reached in October 2014. Bovine meat price strength throughout this year stemmed from vigorous demand from China, caused by consumers' efforts to fill the large supply gap emerged due to a large reduction of pig meat output. International quotations rose sharply in recent months due to a surge in global demand, exceeding global supply availabilities. Increased demand in November due to end of year festivities exacerbated the tightening of global bovine meat markets, further adding to price pressure.

The index for ovine meat gained 41.2 points (19.8 percent) between January and November or 21.5 percent from the corresponding month last year and nearing the peak reached in July 2011. World ovine meat prices reached a high point in September 2018, but since then, prices declined, reflecting increased supplies from Oceania, especially owing to drought-induced slaughter. Since April, however, ovine prices increased, underpinned by strong import demand, mainly from China, amid reduced export supplies from New Zealand, as the country entered into its seasonally low production period, leaving Australia to fill the balance.

The index for poultry increased by 13.8 points (9.0 percent) from January to November. However, it remained 56.3 points (25.2 percent) below the peak it reached in April 2013. From January to June this year, poultry prices increased moderately, reflecting some increases in import demand, especially from China, but imports did not continue to expand as many traders had expected, especially after July. This led to an excess supply at the global level, weighing on international quotations. Strengthening of Brazilian currency against the US dollar also dampened Brazil's poultry exports. In November, prices recovered slightly after three months of declines induced by an overall tightening of meat markets as demand increased due to end of year festivities.

Policy update

This policy review focuses on selected policy measures related to domestic production and international trade, covering the period from June 2018 to November 2019.

Production-related policy measures are those that promote or discourage production, without having specific import- or export-related provisions. These may include: tax provisions or incentives; targeted production supports; support to specific sectors that deem necessary to promote production and trade, including small-scale entrepreneurs and micro-finance providers; standards and other requirements; accreditation and conformity assessments; sanitary and phytosanitary requirements; competition policy and price controls; state trading, state-owned enterprises, and privatization; government procurement; and intellectual property rights. This section reviews critical policy developments that have taken place in FAO member countries during the reference period.

International trade and related policy measures are those that affect trade flows, including instruments of border protection or domestic market interventions. They include import tariffs and quotas, trade-related subsidies or taxes, import or export bans and non-tariff measures.

Measures-related to production

The United States of America: farm subsidies

On 24 July 2018, the United States of America announced a plan to provide subsidies worth USD 12 billion for farmers, aiming to “stabilize, support and protect farm income and prices” and to contain the impact from the retaliatory tariffs imposed by trading partners in response to US tariffs on steel and aluminium imports. The programme offered USD 250 000 per eligible producer of specified commodities, including dairy and livestock during the period from 29 July to 6 December 2019. In addition, the government offered compensation through the Disaster Relief Act 2019 and activated food purchasing and distribution to purchase surplus of affected commodities and a trade promotion programme to develop new export markets under The Commodity Credit Cooperation (CCC) is implementing the programme, while the Foreign Agricultural Services is responsible for developing new export markets.

Japan: agricultural support

Japan allocated more funding for the Agriculture and Agricultural Villages Improvement Programme in the 2019/20 fiscal year. The programme aims to consolidate and enlarge farmland and improve agricultural waterways and reservoirs; and promote smart agriculture as a means to address farm labour shortages, a long-standing issue that beset the agricultural sector. The Agricultural Villages Improvement Programme is a core public support programme that aims to consolidate farmlands, improve agricultural waterways and reservoirs. Japan also uses market price support (MPS), based on output and variable input use, mainly directed at rice, pig meat and milk production.

Meat production received a significant focus in the budget, with increased funding for the domestic pig meat industry under the hog growers’ business stabilization measures (marukin), first launched in 2013, specially targeting mid-range farmers with fewer than 300 employees and a market capitalization less than 300 million yen. Under this programme, farmers receive 90 percent (instead of 80 percent offered earlier) of the difference between costs and revenues, if the average cost of production per hog exceeds its national average on a quarterly basis.

In December 2018, Japan also revised the calculation method for two reference prices used to determine support payments under its deficiency payment scheme for feeder beef calves. The programme aims to increase competitiveness of local beef production, affected by the lowering of tariffs on imported beef under the bilateral and multilateral trade agreements that Japan signed recently.

Mexico: new agricultural support programme

In January 2019, Mexico introduced a new agricultural support programme, replacing the *Proagro Productivo*, and allocated nine billion pesos (approximately USD 474 million) for 2019. The new programme aims to improve the living conditions of some 2.8 million small-scale producers with less than five hectares of land by providing guaranteed prices for selected agricultural commodities; offered assistance to farmers and companies in the livestock sector for acquiring equipment or infrastructure; and improving livestock management (reproduction, maintenance or rehabilitation of grazing lands).

China: new agricultural policy

On 19 February 2019, China unveiled its annual government policy document, outlining changes to agricultural policy framework. Following the farm consolidation policy that led to significant changes in production and trade in milk and milk commodities, the new policy emphasized the need to focus on upgrading and renovating small and medium-sized dairy farms. In addition, the government proposed to provide support for identifying agricultural technology and financing rural economic activities including the livestock sector. The new policy emphasized the need to upgrade and renovate small and medium-sized cattle farms and to advance measures to prevent and control animal epidemics. The new policy includes support to domestic agricultural sector, including for technology innovation and rural financing. The policy also proposed subsidies for constructing large pig farms, simplifying administrative procedures and reducing cost of land acquisition for pig farming.

Tunisia: revisions to food safety law

In February 2019, Tunisia approved a law on food and feed safety. Key measures of the law include a) proposals to create a national authority for food safety and a national agency for risk assessment; and provisions for repealing and replacing some aspects of Tunisia's law on animal husbandry. Once enacted, exporters must comply with new standards, including specific food content requirements, labelling and marketing.

New Zealand: mycoplasma bovis 2019 national plan

In March 2019, New Zealand launched a national plan to eradicate mycoplasma bovis, which aims to eradicate the bacterium from the country's cattle herd and strengthen the national biosecurity system. By September 2019, New Zealand cleared 171 properties as free from the bacterium, while leaving 20 under quarantine. The Ministry of Primary Industries is leading the programme in collaboration with stakeholders.

Measures-related to trade

Trade negotiations

The United States of America–China trade negotiations

The United States of America and China have been negotiating to find a solution to the trade dispute between the two countries that began when the United States of America levied tariffs on all imported washing machines and solar panels in January 2018. Despite the negotiations, both countries continue to maintain tariffs and retaliatory tariffs on imports of both countries. The United States of America has proposed to levy taxes for all imports from China, estimated at USD 570 billion and China has announced plans to levy import taxes on imports from the United States of America worth USD 170 billion. From January to September, dairy

product exports from the United States of America to China (Mainland) declined, with whey powder falling by 74 percent, cheese by 40 percent, SMP by 82 percent and WMP 90 percent.

The United States of America–Mexico trade negotiations

On 5 June 2018, Mexico levied a 15 percent retaliatory tariff on US agricultural products due to US tariffs on steel and aluminium. On 17 May 2019, the United States of America announced the removal of tariffs on steel and aluminium, and in response, Mexico lifted retaliatory tariffs, effective 10 June 2019. However, on 30 May 2019, the United States of America announced the imposition of five percent tariffs on all imports from Mexico with the effective date from 10 June 2019. In a subsequent joint communique, the imposition of the tariff was postponed indefinitely, but the announcement led to short-term market uncertainty, including a sharp fall in peso value.

Mexico is the largest export destination (in volume terms) for US pig and poultry meats and the third largest destination for bovine meat, with a combined value of USD 3.1 million exports in 2018. In addition, the United States of America and Mexico have vertically integrated meat production systems, especially the pig meat sector.

The United States of America–Canada trade negotiations

On 1 July 2018, Canada levied a 10 percent retaliatory tariff on imports from the United States of America, including selected agricultural products, in retaliation of tariff on steel and aluminium by the United States of America. On 17 May 2019, the United States of America announced the removal of tariffs on steel and aluminium, and in response, Canada lifted the retaliatory tariffs against the United States of America.

The United States of America–Mexico-Canada Agreement

On 30 November 2018, the United States of America, Mexico and Canada signed a trade agreement called United States-Mexico-Canada agreement, replacing the North American Free Trade Agreement (NAFTA). According to the report published by the United States of America International Trade Commission (USITC) on 18 April 2019, USMCA would raise its GDP by 68 billion USD (0.35 percent) and generate 176 000 employment opportunities (0.12 percent) and increase exports to Canada by USD 19.1 billion (5.9 percent) and Mexico by USD 14.2 billion (6.7 percent). The agreement is expected to create additional market access for the United States of America in the poultry sector, including increased TRQs in Canada. Meat trade with Mexico is unlikely to change significantly, as agricultural exports from the United States of America had zero tariff under the NAFTA. A novelty in the new agreement is the inclusion of agricultural intellectual property protection.

The United States of America–the European Union trade negotiations

On 8 April 2019, the United States Trade Representative (USTR) announced a process for levying tariffs against the European Union countries under the Section 301 of the Trade Act of 1974. In retaliation, the European Commission on 18 April 2019 indicated to levy tariffs against imports from the United States of America, worth Euro 20 billion, citing its own case in the WTO against subsidies for the Boeing Company. On 1 July 2019, the United States of America released a list of additional items that could be subject to tariffs from the European Union. In the meantime, the WTO ruled that subsidies to the Airbus Industry provided by the European Union have violated WTO rules governing subsidies. On that basis, the United States of America in October 2019 announced tariffs, ranging from 10 to 25 percent on imports, worth 7.5 billion USD from the European Union. The meat sector is likely to have significant impact.

Trade agreements

The European Union–Japan trade agreement

In July 2018, the European Union and Japan signed an Economic Partnership Agreement (EPA), which entered into force in February 2019. The agreement aims to build closer economic partnership between the two trading partners. Under the agreement, Japan will phase out ad valorem duties for fresh, chilled and frozen bovine meat cuts applicable to the European Union from the current rate of 38.9 percent to 9 percent in 15 years. Safeguard trigger quantities have increased from 43 000 tonnes to 50 500 tonnes by 2027 and by a fixed quantity for an agreed time thereafter. As regards to poultry meat, base rate tariffs between 7.7 percent and 10.8 percent will be phased out after periods between 5 and 10 years. As regards ovine meat, current MFN duties are already at zero. In addition, the agreement proposes to protect more than 200 EU-origin geographical indications in Japan, while also providing similar protection for Japanese products in the European Union. In August 2018, Japan notified the WTO its intention to amend the Act on the Protection of the Names of Specific Agricultural, Forestry and Fishery Products and Foodstuffs to ensure reciprocal protection granted under the bilateral agreement.

The European Union–Singapore trade agreement

In October 2018, the European Union and Singapore signed a Free Trade Agreement, aimed at eliminating customs duties within five years for qualifying products from Singapore. Among the nine main parts of the agreement, labelling and safety testing, customs procedures, intellectual property and trade in goods will have implications for the meat and dairy sectors.

The Comprehensive and Progressive Agreement for Trans–Pacific Partnership (CPTPP)

On 30 December 2018, a multilateral trading agreement, called the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) among Australia, Canada, Japan, Mexico, New Zealand, Singapore and Viet Nam. The agreement granted its members market access opportunities for livestock products under tariff rate quotas. A second round of cuts came into effect on April 1, 2019, for both CPTPP. Under the agreement, each member country has agreed to reduce tariffs and / or implement tariff rate quotas on staggered basis, covering a range of goods including meat and meat products.

The agreement is likely to increase trade within the block while reducing potential trade with non-EPA members, given tariff preferences granted to member states or entities. For example, Japan agreed to reduce the ad valorem duty on pig meat imports from CPTPP countries to 2 percent from 4.3 percent effective 30 December 2018, and to 1.9 percent on 1 April 2019, with annual reductions until the duty rate becomes zero in 2028. With the launch of the CPTPP, Japan also added a second trigger condition to the WTO safeguard mechanism for pork imports. While the new system kept the gate price and tariff increases unchanged, the new system establishes a double trigger system for safeguard based on imports from all countries and special safeguard that triggers on imports from countries where Japan does not have an economic partnership agreement. The first is the safeguard which, when triggered, increases the gate price from 524 yen/kg to 653 yen/kg for the remainder of the Japanese fiscal year (or the first quarter of the next Japanese fiscal year if triggered in the fourth quarter) for fresh, chilled, and frozen pork cuts. Prior to the revision, the safeguard trigger level was set at 119 percent of average imports from non-EPA partners from the previous three years on a cumulative quarterly basis. The second safeguard mechanism is the special safeguard which, when triggered, increases the ad valorem tariff from 4.3 percent to 5.7 percent for the remainder of the Japanese fiscal year.

The Indonesia–Australia Comprehensive Economic Partnership (IA–CEPA)

In March 2019, Indonesia and Australia signed the Indonesia–Australia Comprehensive Economic Partnership Agreement (IA–CEPA), which is over-arching framework agreement, based on two existing agreements: a free trade agreement; and the ASEAN–Australia–New Zealand Free Trade Agreement.

The new agreement covers tariff reductions; mechanism to address non-tariff barriers (NTBs) and import licensing; and allows for tariff reductions on a range of products.

Under the goods market access commitments, Australia will receive duty-free access to Indonesia for 575 000 live cattle a year, rising to 700 000 in year 6; and duty reductions for exports of frozen beef, sheep meat and feed grains. The agreement will also make improvements to administrative procedures on imports and exports. The two countries have agreed to establish a bilateral co-operative mechanism, enabling regular discussion of NTBs to trade, including sanitary and phytosanitary measures. Indonesia will use TRQs for designated product imports from Australia and that the Ministry of Agriculture will issue automatic import permits, which had been under negotiation. In addition, the two countries have agreed to establish a committee on trade in goods, within 360 days of the date of entry of the agreement, to address issues on sanitary and phytosanitary matters, technical barriers to trade and trade facilitation.

The European Union–MERCOSUR trade agreement

In June 2019, the European Union and the Southern Common Market (MERCOSUR), comprising Argentina, Brazil, Paraguay and Uruguay, reached an agreement on trade. The agreement aims to strengthen trade, guarantee European geographical indicators and remove majority of tariffs on EU exports to MERCOSUR. MERCOSUR will command a 42.5 percent share of the annual European quota for 99 000 tonnes for bovine meat exports, with an import levy of 7.5 percent. The agreement would eliminate the 20 percent import tariff on the good-quality beef quota (Hilton quota) levied by the European Union, allowing each Brazil and Argentina to export up to 10 000 tonnes of bovine meat and 29 500 tonnes of prime bovine meat cuts per year. In return, MERCOSUR countries will offer greater access for agricultural products and guarantee European geographical indications.

The European Union–Viet Nam trade agreement

In June 2019, the European Union and Viet Nam signed a trade agreement and an investment agreement. In addition to trade liberalization commitments, the two agreements aim to support jobs and economic growth; reduce regulatory barriers; ensure protection of geographical indications; and open up services and public procurement markets. Vietnam currently enjoys trade preferences in the European Union under the Generalised Scheme of Preferences (GSP).

The United States of America–Japan trade deal

On 7 October 2019, the United States of America and Japan signed a trade deal. The deal will grant gradual tariff reductions to beef exports from the United States of America to Japan from the current rate of 38.5 percent to 9 percent by 2033. The tariff reduction commitments by Japan is equivalent to what Japan has offered under the CPTPP member countries. The quota will also be expected to increase to 290 000 tonnes of beef. The agreement may enter into force by January 2020.

Tariff rate quotas (TRQs)

Several countries renewed their TRQs in the second part of 2018 and in 2019. Selected TRQs with the potential to affect global meat trade are summarised below.

Canada: increased TRQs

In December 2018, Canada increased TRQ commitments for supply-managed commodities, including meat products, as the country entered into the CPTPP agreement. Under this, Canada added 20 TRQs, which included dairy, poultry and egg products, while the ratification of USCMA will add 16 more TRQs. Canada currently has 42 TRQ commitments specified under different agreements.

Japan: beef and pork TRQs

In March 2019, Japan 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. On 31 May 2019, Japan also announced the safeguard trigger levels for the fourth quarter, setting them at 117 percent for beef, and 119 percent for pork, of the average of the three previous years of trade. For 2019, the TRQ safeguard levels include 1.2 million tonnes of chilled beef, 1.4 million tonnes of frozen beef and 3.5 million tonnes of pigmeat. Under the Special Safeguard Category, Japan issued quotas for 1.3 million tonnes of pork.

The Russian Federation: Eurasian TRQs

In July 2019, the Russian Federation issued TRQs for imports of meat, poultry and whey into the Eurasian Economic Commission (EEC). In line with the WTO commitments, the Russian Federation will eliminate its pork TRQs as of January 1, 2020, but the TRQ volumes for other products will remain unchanged. Belarus and Kazakhstan TRQ volumes will not change. However, Kyrgyzstan's TRQs for poultry has slightly increased, but 2020 beef TRQ has reduced.

The European Union: hormone free beef and high-quality-beef

In August 2019, the European Union and the United States of America signed an agreement, allocating 35 000 tonnes of the hormone-free beef imports quota (also known as EU 481 grain-fed beef quota), out of 45 000 tonnes, to the United States of America, phased over a 7-year period, with the remaining amount left available for all other exporters. This quota was an autonomous system set up to resolve the hormone use dispute between the European Union, the United States of America and Canada, signed in 2009 and revised in 2014. Complying with WTO rules, the European Union negotiated the new allocation system with its trading partners.

The European Union issued import licenses under the high-quality beef (HQB) quota, known as the Hilton quota, for nearly 70 000 tonnes for July 2018 - June 2019 period to Argentina, Australia, Uruguay, Brazil, New Zealand, Paraguay, the United States of America and Canada. HBQ duty rate is set at 20 percent.

The European Union, in January 2019, adopted a text in the European Parliament, apportioning TRQs for agricultural products, including meat products, between the United Kingdom of Great Britain and Northern Ireland and the rest of the countries in the European Union, in the event of Brexit.

Disease-related trade measures

A number of countries removed, or introduced, trade restrictions related to diseases.

Highly pathogenic avian influenza (HPAI) significantly impacted production and trade in poultry products in previous years.

- In recognition of the reduced threat or the elimination of the virus, four countries (China, Saudi Arabia and Singapore) removed restrictions they had placed on nearly 14 countries in different times.
- In February 2019, China (Macao Special Administrative Region) lifted, the ban on imports of poultry and poultry-derived products from the Republic of Korea, Viet Nam, Japan, Thailand, Cambodia, Lao People's Democratic Republic, Indonesia, China (Taiwan Province) and three provinces from China (Mainland), imposed 15 years ago following HPAI outbreaks. China (mainland) also lifted import restrictions that had been placed on France 15 years ago on poultry meat imports related to HPAI outbreaks.
- In October 2019, Saudi Arabia removed restrictions on importing hatching eggs and day-old chicks from Denmark, Italy and the Russian Federation, after recognizing HPAI free status.

However, different variants of the avian flu continued to affect global trade and, as a result, several countries introduced trade restrictions.

- In February 2019, United Arab Emirates suspended poultry imports from Kuwait due to the detection of HPAI virus.
- In July 2019, Japan announced temporary bans of poultry meat and egg imports from Denmark. In September, Japan also announced a similar ban on Chile.

Bovine spongiform encephalopathy (BSE) related trade control measures also played a role in global meat trade.

- In March 2019, the Russian Federation suspended imports of bone-in-meat from all countries that lack official status for BSE.
- In May 2019, Japan removed beef import restrictions that the country had placed on Canada, the United States of America and the United Kingdom of Great Britain and Northern Ireland for over 20 years due to the detection of BSE. Before the removal of the restriction, imports of beef from the United States of America were restricted to product derived from cattle less than 30 months of age, but retained import compliance requirements, including the need for exports to meet export verification programme of the United States Department of Agriculture (USDA).
- In September 2019, the Republic of Korea also removed import restrictions on beef exports from the European Union, which was imposed in 2001 due to the detection of BSE.
- In October 2019, Oman banned imports of poultry products from Malaysia, Viet Nam and Cambodia following HPAI outbreaks.

Foot and mouth disease (FMD) related trade restrictions or their removal continued to affect trade.

- In February 2019, the Russian Federation lifted a ban on Colombian beef imports after a verification that the country is free from the FMD virus, in accordance with the recommendations set out by the World Organization for Animal Health (OIE).
- In March 2019, South Africa resumed issuing veterinary health certificates for beef exports to a number of countries including Mozambique, Lesotho, Egypt and the United Arab Emirates, which it had halted due to an FMD outbreak in January.
- In July 2019, China removed import restrictions on bovine meat the country had imposed after the detection of FMD in South Africa.

African Swine Fever (ASF) affected production and trade in pig meat and products in 2019. This led eight countries to impose restrictions on imports of live pigs, wild boars or pig meat products from Asia (6 countries), Europe (3), Africa (1) and South America (1).

- At different time intervals, China banned importing live pigs / wild boars or meat products from several countries where ASF virus was detected, including Mongolia (January 2019), Viet Nam (January 2019), Cambodia (April 2019), Lao People's Democratic Republic (Jun 2019), Slovakia (August 2019) and the Republic of Korea (September 2019).
- In August 2019, the Russian Federation banned pig meat imports from Serbia due to the detection of ASF virus in some animals.

Export / import licenses

Some countries removed trade restrictions that they imposed earlier on their trading partners due to food safety concerns.

- In October 2018, the Russian Federation allowed nine plants to resume exporting pig meat to the country and signed the veterinary certificate required for one plant in Brazil to resume exporting bovine meat products to the country.
- In November 2018, Mexico authorised 26 Brazilian meat plants to export chicken products into the country.

- In January 2019, Saudi Arabia reduced the number of Brazilian plants with export permits to 25 for poultry meat exports to the Kingdom, while authorizing Ukraine to export beef to the country.

Several countries issued import licenses after going through standard testing procedures.

- In different time interval, China issued export licenses to several countries, offering them with market access to China, including Argentina (April 2019), the Russian Federation (May 2019), Brazil (September 2019 - 25 processing plants), Lithuania (September 2019) and Ukraine (September 2019). China also signed a protocol agreement with Portugal, allowing the latter to export pig feet to China, under a bilateral agreement signed in May 2019, which aims to facilitate agricultural exports from Portugal. In November 2019, China lifted its bovine and pig meat imports, which it banned in June 2019.
- In February 2019, the Republic of Korea cleared nine more Brazilian poultry and pig meat processing plants to export products to its market. This follows the lifting of restrictions last year on four Brazilian processing plants after ten-year negotiation.
- In April 2019, the European Union introduced a series of changes to rules on imports of animal products from countries including Argentina, the Russian Federation and Egypt. The European Union also allowed imports of fresh bone-in meat from Patagonia Norte in Argentina.
- In August 2019, Japan accepted a veterinary certificate of Ukraine and granted an export license for poultry meat.
- In August 2019, Tunisia and the United States of America finalized an export certificate, allowing the United States of America to resume meat exports to the country, including bovine, poultry and egg products.
- In August 2019, the Russian Federation cleared bovine market access to Brazil. The restrictions to import beef and pig meat existed since December 2017 due to the “weak meat scandal,” but lifted restrictions in November 2018 on nine beef processing and six pig meat plants.
- In September 2019, Viet Nam granted an export license to Lithuania to supply meat after completing an inspection of Lithuania’s meat control systems.

Anti-dumping

- In February 2019, China exempted 14 Brazilian firms from anti-dumping tariffs on imports of poultry products, on the condition of selling them above a certain, undisclosed floor price. China (Mainland), in March 2019, signed an agreement with France to lift the embargo on French poultry exports, which was in place since 2015 after the detection of bird flu.
- In August 2019, Indonesia lifted import ban for shipments of bovine and poultry meat from Brazil, following a ruling by the WTO dispute settlement body that ruled in favour of Brazil.

Import procedures

Two countries introduced changes to import procedures during the reference period.

- In October 2018, Viet Nam promulgated a renewed Harmonized System (HS) of codes for imports and exports subject to specialized inspection and clearance prior to customs clearance. This renewal affects HS codes of terrestrial animals and products thereof and animal feed and feed ingredients. The new inspection scheme came into operation on 1 January 2019.
- In December 2018, Tunisia repealed its earlier ban on import financing for select imported consumer goods that it deemed as ‘non-essential’. Repealing of the ban is likely to stimulate domestic demand and imports, which is likely to increase agricultural imports into Tunisia.

Statistical Annex

FAO Meat Price Indices

Period	FAO indices (2002-2004=100)				
	Total meat	Bovine meat	Ovine meat	Pig meat	Poultry meat
Annual (Jan/Dec)					
2008	161	158	128	152	184
2009	141	135	151	131	162
2010	158	165	158	138	179
2011	183	191	232	153	206
2012	182	195	205	153	201
2013	184	197	178	157	206
2014	198	231	202	164	200
2015	168	213	157	126	168
2016	156	191	154	123	156
2017	170	204	194	135	169
2018	166	204	227	124	160
Monthly					
2018 – October	160	197	229	117	155
2018 – November	163	201	234	117	157
2018 – December	162	202	228	117	156
2019 – January	160	200	208	117	154
2019 – February	163	205	207	117	157
2019 – March	164	207	202	120	160
2019 – April	171	212	202	131	164
2019 – May	174	209	206	136	173
2019 – June	176	209	216	142	171
2019 – July	179	212	226	141	175
2019 – August	180	214	226	141	175
2019 – September	180	217	232	141	170
2019 – October	182	224	236	142	167
2019 – November	190	244	250	144	167

Note: The FAO Meat Price Index is a measure of the monthly change in international prices of a basket of meat commodities. It consists of the average of four meat price indices, weighted with the average export shares of each of the groups for 2002-2004. The value of the Meat Price Index and sub-indices for the most recent months are derived from a mixture of projected and observed prices, and therefore, they are subject to revision.

Source: FAO

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