



# OECD-FAO Agricultural Outlook 2011-2020



## Chapter 7

# Meat

## Market situation

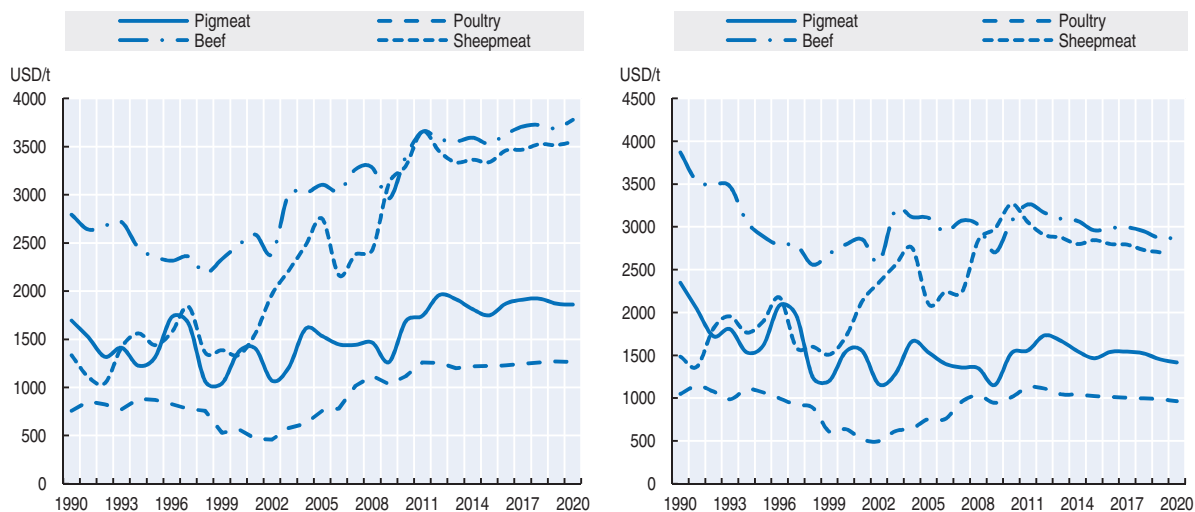
The meat sector is adjusting to the supply and demand imbalances in the feed sector of the past three years, which has incited swings in feed prices. Beef and sheep meat farmers are enjoying a period of higher prices, but those producing white meats, require supply adjustment to avoid further financial difficulties. Faced with high production costs, restricted access to credit, high energy costs and a subdued demand during the financial crisis, cattle farmers culled their herds. This initially resulted in a sustained supply of meat products, and prices fell sharply. Prices started to recover as economies pulled out of recession. The red meats sector had liquidated breeding animals and was unable to rapidly satisfy the increasing post-recession demand. As a result, prices recovered strongly in 2010. The supply of pig and particularly poultry meat responded more quickly to the higher demand and, as a result, prices recovered at a slower pace than those of red meats.

## Projection highlights

- The meat market outlook for the decade ahead reflects the response to sustained high feed costs in a context of firm demand, particularly from developing countries. High price signals in the first half of the Outlook are expected to result in the expansion of livestock inventories, and a subsequent expansion of trade during the second half (Figure 7.1).
- World meat production growth is anticipated to slow to 1.8% p.a. dampened by higher costs during the Outlook period, which compares to 2.1% p.a. for the previous decade. The growth is primarily driven by productivity gains from both larger economies of scale and technical efficiency gains, notably for poultry and pigmeat in developing countries (Figure 7.2).
- Relative to the previous decade, meat consumption growth in the Outlook period will decelerate due to high meat prices and a slowing of population growth. Demand growth will mostly stem from large economies in Asia, Latin America and oil exporting countries.
- Driven mostly by an expansion of poultry and beef shipments, world meat exports in 2020 are projected to increase by 1.7% p.a. in the Outlook period, which compares to 4.4% p.a. in the previous decade. Slower growth is largely attributable to reduced import demand by the Russian Federation which is seeking to expand its livestock sector. The bulk of the growth in meat exports will originate from South and North America, which together account for 84% of the world increase in exports.

Figure 7.1. **World meat prices adapt to high feed costs and firmness of demand (c.w.e or r.t.c.)**

Nominal vs. real meat prices<sup>1</sup>



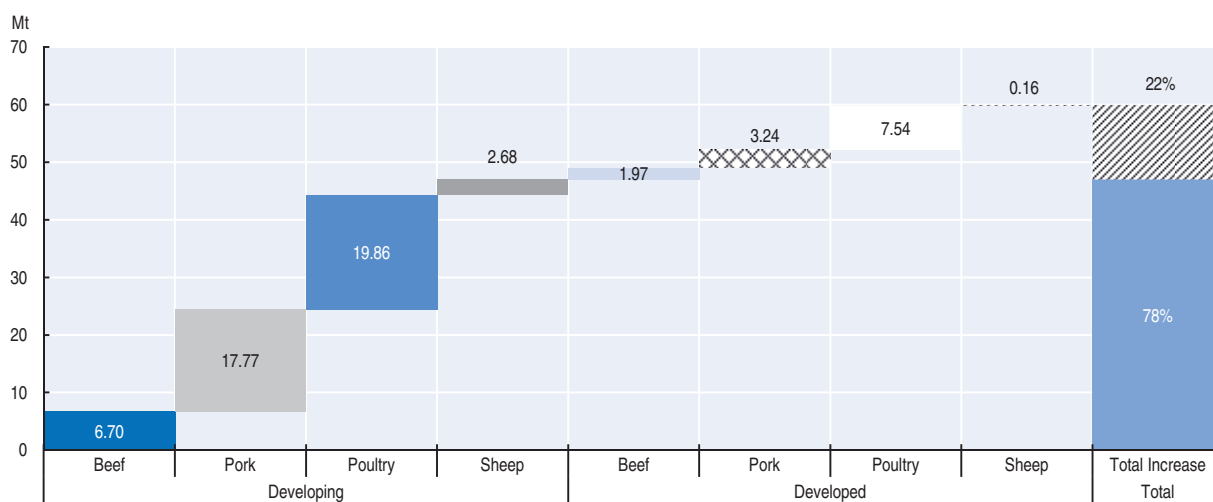
1. US Choice steers, 1100-1300 lb dressed weight, Nebraska. New Zealand lamb schedule price dressed weight, all grade average. US Barrows and gilts, No. 1-3, 230-250 lb dressed weight, Iowa/South Minnesota. Brazil average chicken producer price ready to cook.

Source: OECD and FAO Secretariats.


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Figure 7.2. **Meat production growth dominated by developing countries**

Production growth: by region and meat type, 2020 vs. base period (c.w.e. or r.t.c.)



Source: OECD and FAO Secretariats.

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## Market trends and prospects

### Prices

Meat prices, which in 2011 are at record high levels, will remain firm during the Outlook period. The current price peak, due to the combined effect of a tight supply situation from low livestock numbers and high feed costs, will trigger a modest increase in supply in the short run and price pressures may ease somewhat. However, prices will remain firm in the second half of the projection under persistently high production costs due not only to high feed prices, but also the assumption of ongoing introduction over the years of more stringent food safety, environmental, and animal welfare regulations (housing, transportation) and traceability by major meat producing countries. These collective preferences are likely to play a role in the future international trading system. Nominal prices for beef and sheep meat increase by 18% and 20% by 2020 relative to the 2008-2010 base period, whereas pigmeat and poultry prices are expected to be 26% and 16% higher (Figure 7.1). Sheepmeat prices have seen a substantial increase in its prices in the recent past due to a lower supply as well as a currency appreciation in Australia and New Zealand. In real terms, all meat prices are expected to remain firm and on a higher plateau for the Outlook period.

### Production

Annual world meat production growth is projected to slow, averaging 1.8% p.a. during the Outlook period. Complying with the new housing regulations for sows, due to be implemented in January 2013, will increase costs for EU producers and may reduce production. High feed prices, inefficient road transport infrastructure in key regions richly endowed with natural resources (Brazil, the Russian Federation and Sub Saharan Africa) as well as increasing constraints on natural resources in other, will hamper the full potential for production growth that could be realised through higher livestock numbers, economies of scale and technical efficiency gains. The increase is expected to occur predominantly in developing countries, which will be responsible for about 78% of the additional output. Meat production growth will be originating mostly from the poultry and pigmeat sectors which, relative to the more expensive red meats, benefit from shorter production cycles and have higher feed-to-meat conversion rates (Figure 7.2). Sheep breeding stocks are expected to stop declining in Oceania as the increase in import demand from Middle East countries stimulates markets.

The Outlook period will be characterised by sustained high feed prices. This will lead to technological changes towards a more efficient use of this input. In intensive feed based production systems, this is likely to result in the development of more efficient feed to meat conversion technologies, notably in the poultry and pig industries. In the case of beef, grass based production systems should expand and will lead to a more strategic use of feed concentrate.

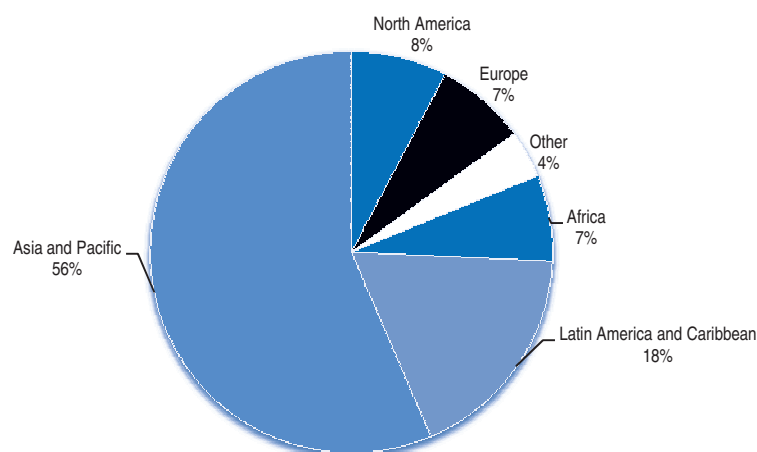
### Consumption

Meat consumption growth in the Outlook period will be curbed relative to the previous decade by high meat prices and slowing population growth. Consumer aging, coupled with an increasing awareness of the impact of meat production on the environment are expected to exert some adverse effect on demand, particularly in developed countries. Moreover, occurrences of meat-based diseases like E. coli and salmonella, combined with recent episodes of meat and milk contamination with chemical compounds (dioxin and

melamine), have served to lowered consumer confidence in some instances. Nevertheless, higher meat consumption brought about by income growth and urbanisation will strengthen the intake of animal proteins at the expense of foods of vegetal origin in emerging economies. It is expected that demand growth will mostly stem from large economies in Asia, Latin America and the oil exporting countries (Figure 7.3).

Figure 7.3. **Increase in meat demand, by region between 2020 and the base period (c.w.e. or r.t.c.)**

Consumption growth of 60 Mt is projected by 2020; predominantly in Asia



Source: OECD and FAO Secretariats.

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### Trade

Growth in meat trade for the next decade is anticipated to slow due to the combined effect of slowing production and firm world prices that discourage imports. An expansion of poultry and beef shipments will lead world meat exports to increase 16% by 2020 relative to the base period (see Figure 7.4). The bulk of the growth in meat trade is expected to originate largely from North and South America, which will account for nearly 84% of the total increase in all meat exported by 2020. US meat exports are expected to benefit from a lower import tariff applied in the new free trade agreement with Korea (KORUS) as well as the progressive easing of BSE-related import restrictions imposed by high income trading partners. Meat exports from the EU are anticipated to decline over the decade due to reduced domestic output following policy reforms, coupled with a growing domestic consumption brought about by the EU enlargement. The annual meat import quotas also increased as new countries joined the EU (see Box 7.1). Japan is projected to remain the leading meat importing country by 2020, followed by Mexico and Korea. The Russian Federation remains one of the largest net meat importers but TRQs will hamper meat imports as will China's self-sufficiency policy.

#### Box 7.1. Evolution of EU tariffs' quotas (TRQs) for red meat

Following the 2004 and 2007 EU enlargements, some quotas, both available for all (*erga omnes*) and country-allocated, have increased as a result of negotiations under Article XXIV.6 of the WTO Agreement on Agriculture. Moreover, from 1st January 2008, the former quotas for African, Caribbean and Pacific (ACP) countries were replaced with unlimited duty-free market access as a provisional application of the EPA (European Partnership Agreements), replacing the former Cotonou agreement.

## Box 7.1. Evolution of EU tariffs' quotas (TRQs) for red meat (cont.)

**Beef**

The current beef TRQ can be divided into several GATT quotas comprising: country-allocated, *erga omnes*, live animals and meat products. There are also three bilateral quotas for baby beef (Balkans, Switzerland and Chile) and an *erga omnes* quota of 20 kt of high quality beef. The latter was instituted in 2009, following the conclusion of an US-EU memorandum of understanding, intended to resolve the long standing hormones dispute on EU meat imports from the United States. Moreover, in 2009 the EU concluded an agreement with Brazil (in the context of WTO Article XXIV.6), which increased the import quota for Brazilian high quality beef, as well as the *erga omnes* frozen beef quota for processing. Live animals and different meat products, defined by specific product categories, qualities and/or end uses are included in these TRQs. Duty-free in-quota imports can enter from all countries under the general high quality beef quota and from Chile (fresh, frozen) and Switzerland (live, dried), while a 4-6% *ad valorem* tariff is applied on live animal imports from all countries. In addition to some combined rates, a 20% *ad valorem* tariff is also applied on Hilton beef, frozen meat and frozen meat destined for processing.

Beef TRQ import licenses are allocated after reviewing all applications from different origins. Alternatively, for some country-specific, high quality beef quotas, import licenses are issued after certificates of authenticity are provided by qualified authorities in a third-party country. Import license applicants must be established operators in the EU Member State in which they apply and must have been engaged in international trade in the related sector in the previous two years. For meat processing-specific quotas, the latter requirement is replaced by proof of processing activity.

Table 7.1. EU beef TRQs for 2006-2011

Import tariff quota	Origin	Volume 2010-2011	Duty	Allocated per calendar year or GATT year (July-June)					
				2006-2007		2009-2010		2010-2011	
				Volume	%	Volume	%	Volume	%
7 country allocations:									
High-quality beef		65 250 t pw	20%	49 493 t	82	36 208 t	56	Not yet available	
				-					
	Argentina	28 000 t		27 995 t	100	18 338 t	66		
	USA&Canada	11 500 t		1 785 t	16	1 336 t	12		
	Australia	7 150 t		7 149 t	100	7 147 t	100		
	Uruguay	6 300 t		6 299 t	100	6 299 t	100		
	Brazil	10 000 t		4 990 t	100	792 t	7.90		
	New Zealand	1 300 t		1 274 t	98	1 300 t	100		
	Paraguay	1 000 t		0 t	0	997 t	100		
	Australia (buffalo)	2 250 t		0 t	0	0 t	0		
	<i>erga omnes</i> <sup>1</sup>	20 000 t pw	0%			9 822 t	49		
Frozen beef	<i>erga omnes</i>	53 000 t pw	20%	53 000 t	100	53 000 t	100	53 000 t	100
Frozen beef for processing	<i>erga omnes</i>	63 703 t cw	20%*	54 703 t	100	44 350 t	70	43 447 t	68
Frozen thin skirt	<i>erga omnes</i>	800 t pw	4%	923 t	62	800 t	100	800 t	100
	Argentina	700 t pw				51 t	7.20	Not yet available	
Fresh&Frozen	Chile	1 750 t pw	0%	1 350 t	100	1 650 t	100	Not yet available	
Baby beef	Country allocated Balkans	22 525 t cw	20% av + 20% spec.	3 117 t	14	3 633 t	16	3 563 t	16
Dried boneless	Switzerland	1 200 t pw	0%	237 t	20	1 200 t	100	1 200 t	100
Live bovines	Switzerland	4 600 head	0%	4 600 h	100	1 610 h	35	1 380 h	30
Young males for fattening	<i>erga omnes</i>	24 070 head	16%+ 582[euro]/t	3 255 h	14	0	0	Not yet available	
Live mountain and Alpine breeds	<i>erga omnes</i>	1 421 head	4% or 6%	900 h	63	0	0	Not yet available	

1. According to the Memorandum of Understanding between the EU and Canada and that between the EU and US, the quantity of this *erga omnes* TRQ will be increased in two steps, first to 21 500 t (date of application to be determined) and from 2012 to 48 200 t.

\* Higher duty for B-products. Under A-products: you have meat intended to produce cooked beef products and under B-products: meat intended to be used for producing smoked and salted product.

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## Box 7.1. Evolution of EU tariffs' quotas (TRQs) for red meat (cont.)

## Sheep and goat meat

EU sheep and goat meat imports are subject to TRQs totalling 284 651 t c.w.e., filled mostly (282 660 t c.w.e.) by both fresh and frozen sheep and goat meat imports (Harmonized System code 0204) that are mainly allocated to New Zealand. All TRQs, with the exception of the live animal quota, have a 0% in-quota duty rate. The TRQs have been relatively constant overtime, apart from small increases resulting from the GATT Article XXVIII negotiations and bilateral agreements. The Chilean quota (6 600 t in 2011) is scheduled to increase by 200 t annually, based on a bilateral agreement negotiated in 2003. Only 92 t (c.w.e.) of live animals can enter the EU at a 10% duty rate, regardless of origin. The quota allocated to Iceland (1 850 t) covers fresh and frozen meat, as well as certain processed products (e.g. smoked sheep meat). All sheep and goat meat TRQs are allocated on a calendar year, "first come first served" basis.


Table 7.2. EU sheep and goat meat TRQs for 2004-2010

Country group	Product, CN code	Ad valorem duty %	Specific duty	Origin	Annual volume (t cw)	Quota use, % 2010	Quota use, % 2007	Quota use, % 2004
1 Fresh & Frozen	0204 fresh and frozen sheep and goat meat	Zero	Zero	New Zealand	227 854	86	99	93
				Argentina	23 000	25	24	24
				Australia	18 786	98	97	98
				Chile <sup>1</sup>	6 600	89	78	54
				Uruguay	5 800	77	99	87
				Norway	300	0	2	90
				Turkey	200	0	0	0
				Others	200	26	60	0
				Greenland	100	0	0	0
				Faroes	20	0	0	0
2	204							
Iceland Fresh-Frozen & processed	0210 99 21	Zero	Zero	Iceland <sup>2</sup>	1 850	99	41	79
	0210 99 29							
	0210 99 60							
3	0104 10 30							
Live animals	0104 10 80	10%	Zero	<i>Erga omnes</i>	92	0	3	0
	0104 20 90							
<b>TOTAL</b>					<b>284 651</b>	<b>82</b>	<b>92</b>	<b>87</b>

1. Chile TRQ: 6 400 t in 2010, 5 800 t in 2007 and 5 200 t in 2004.

2. Iceland TRQ: 1 725 t in 2007 and 1 350 t in 2004.

Source: European Commission.

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Beef exports during the Outlook period will expand at 1.8% p.a. compared to 2.9% p.a. in the past decade. The expansion will be led by the United States, Brazil and Canada. Brazil exported record volumes in the mid 2000s, following the sharp drop in US and Canadian beef exports after the BSE incidences. Brazilian exports have since declined, but will grow during the Outlook period despite increasing domestic consumption induced by growing income, with the country taking advantage of its extensive grasslands for rearing cattle in times of expensive feed. Brazil will establish its position as the leading world exporter, with volumes in 2020 reaching 2 Mt. As mentioned above, the United States will continue expanding from improved market access to the Pacific market. By 2020 US export



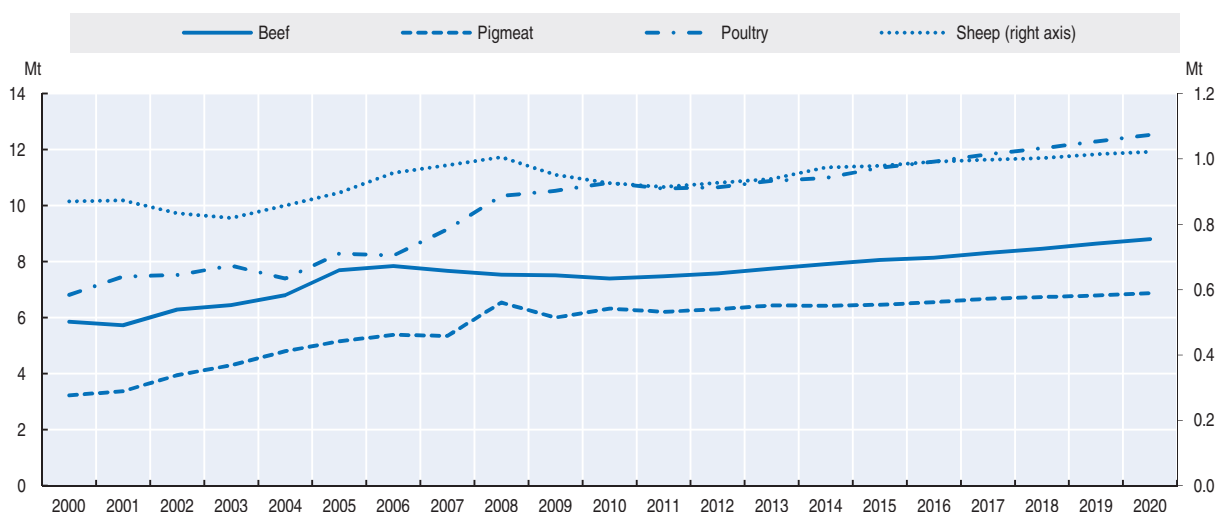
volumes are anticipated to be higher than those recorded before the BSE crisis emerged. The expansion of exports by the US, in volume terms, will be more than offset by larger imports, and the country will see a continuation of its negative trade balance in beef.

By 2020 Canadian beef exports will also steadily increase, prompted by productivity gains and changes in feeding practice. Shipments from Australia will stagnate from reduced herds and expensive feeds, exports from New Zealand will marginally increase from an enlarged dairy herd, while in Argentina export restrictions will continue to limit trade.

The expansion of world pigmeat trade will be relatively modest during the Outlook period, but this outcome masks some significant changes in the composition of trade. North and South American pork shipment are expected to increase. Exports from Brazil are expected to expand, but its rapid growth of the last decade will be curbed during the projection period by a strong domestic demand. Net trade in China, where half of the world's output is produced and consumed, is not expected to change during the Outlook period. Government policies will continue to support the pork industry through the scaling up of production and the modernisation of its markets. These include buying into intervention stocks, setting up futures markets, and support for large scale production facilities and genetic improvements.

Figure 7.4. **Evolution of world exports of beef, pigmeat, poultry and sheep (c.w.e. or r.t.c.)**

Overall meat export to reach nearly 30 Mt by 2020 a 16% increase from the base period



Source: OECD and FAO Secretariats.

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A slowing down of trade growth in poultry products is anticipated, from an annual rate of 4.7% in last decade to 2% during the Outlook period. The largest contributors to projected export growth are the US and Brazil, both of which are expected to strengthen their dominance of world trade. During the first part of the projection, their exports will stagnate due to the demand response to high poultry product prices, as well as a tight supply situation created by expensive feeds. Nevertheless, the adaptation of producers to higher feed and energy costs is expected to induce structural changes in the industry, boosting production and exports, most notably during the second half of the projection period. By 2020, US and Brazilian exports would account for nearly half of the additional export supply in world markets. Growth in Argentinean exports to the South American market continuously increases, given ample feed, a depreciating peso and no export restrictions.

Thailand exports are also anticipated to expand slightly, mainly for processed products. Exports from the EU will decline due to growing domestic demand, a strong euro and animal welfare regulations limiting stocking density.

Import growth will be led by countries in the Middle East, Southeast Asia and Latin America. Expansion in Mexico's food processing industry is expected to boost the country's import demand, while purchases by Russia, once the world's largest importer, will significantly decline following higher domestic production. In the EU, the decline in exports during the projection period will be accompanied by a sustained, albeit moderate, expansion of imports. As a result, the EU, a traditional net exporter, will see a constant deterioration of its terms of trade, with a balanced account by 2020. The EU will nevertheless continue to play a major role in world markets, both as an exporter and an importer of poultry products.

Oceania sheepmeat exports will increase slightly, mainly due to supply response from Australia, as pasture based meat production will compete well against an increasingly grain intensive meat production. The destination of those exports will continue to be traditional markets combined with increased demand for sheepmeat from the Middle East. The European market will continuously lower their imports (which will remain below quota level) due to the tight world supplies, relatively high prices and a weaker domestic demand.

### Main issues and uncertainties

Animal disease outbreaks have shown to have potential radical effects on supply, demand and trade. For diseases such as FMD and BSE, the impacts vary significantly depending on whether the region is an importer or exporter, the importance of market share and the ability to contain the outbreak within an intra-country region. Any outbreak in a major exporting country, such as Australia, Canada, US and Brazil, which could not be regionalised will affect domestic and international markets. The incidences of BSE in the US and Canada and resulting trade restrictions, altered world markets for a considerable period of time. For importers, the impacts are generally much less severe. Other potential disease outbreaks which may have zoonotic scope, such as H1N1, still loom as potential factors that could impact significantly meat markets, not only for trade, but also for global consumption.

A number of key market drivers and macroeconomic events could alter the meat market projections in this outlook. The Russian Federation has traditionally been a top meat importer, but the pigmeat and poultry sectors have experienced in recent years sustained growth. The outlook assumes that this trend will continue during the Outlook period, with the Russian Federation achieving a certain degree of self-sufficiency and having exportable surpluses. China's net trade position *vis-à-vis* pigmeat remains a key uncertainty that overhangs world markets. Due to its extraordinary volumes both in terms of production and consumption, unforeseen events in China which could result in import surges of pigmeat have the potential to severely impact international markets. In North Africa and the Middle East, large importers of sheep meat, poultry and beef, changes in oil prices, or the fallout from civil unrest have the potential to impact world meat trade.

The world meat market is highly fragmented due to sanitary restrictions, and therefore changes in the architecture of market access pose a significant risk to the validity of the projections. For example, the beef market is divided into Foot and Mouth free trade routes, and the rest of the world. Large exporters such as the US and Brazil belong to different circuits, and their prices do not always follow the same patterns. The US grants meat market access to the

Brazilian State of Santa Catarina, this is likely to intensify price arbitration between the Atlantic and Pacific markets. In the case of beef, the impact of opening this market would result in Brazilian farmers competing with producers located as far away as Australia.

Finally, environmental costs are rising for the production of virtually all meats, and the implementation of new legislation that conditions production to environmental protection may affect the growth of the sector. Livestock production is recognised as a key contributor to anthropogenic greenhouse gas (GHG) emissions (see Box 7.2). These emissions are expected to increase in the future, as population and income growth increase the global demand for livestock products. It remains uncertain to what extent over the next decade livestock production may be subject to carbon mitigation constraints in some countries. Pricing emissions from livestock production could potentially result in substantial shifts in production and relative meat prices, thus affecting not only the geography of production but also the consumer preference for cheaper meats that are associated with lower GHG emissions, notably poultry. Moreover, as mentioned earlier in the chapter, additional consumer concerns related to such issues as animal welfare, food quality, and production and processing methods may further introduce segmentation in the meat trade, for more information see the documents “Policy responses to societal concerns in food and agriculture: proceedings of an OECD workshop”, OECD 2010 and Tothova, M. (2009), “The Trade and Trade Policy Implications of Different Policy Responses to Societal Concerns”, OECD Food Agriculture and Fisheries, Working Papers, No. 20, OECD publishing.

#### **Box 7.2. Greenhouse gas emissions from livestock production in the European Union**

With increased prosperity, people are consuming more meat and dairy products every year. Global meat production is projected to more than double from 229 mt in 1999-2001 to 465 mt in 2050, while milk output is set to climb from 580 to 1 043 mt.

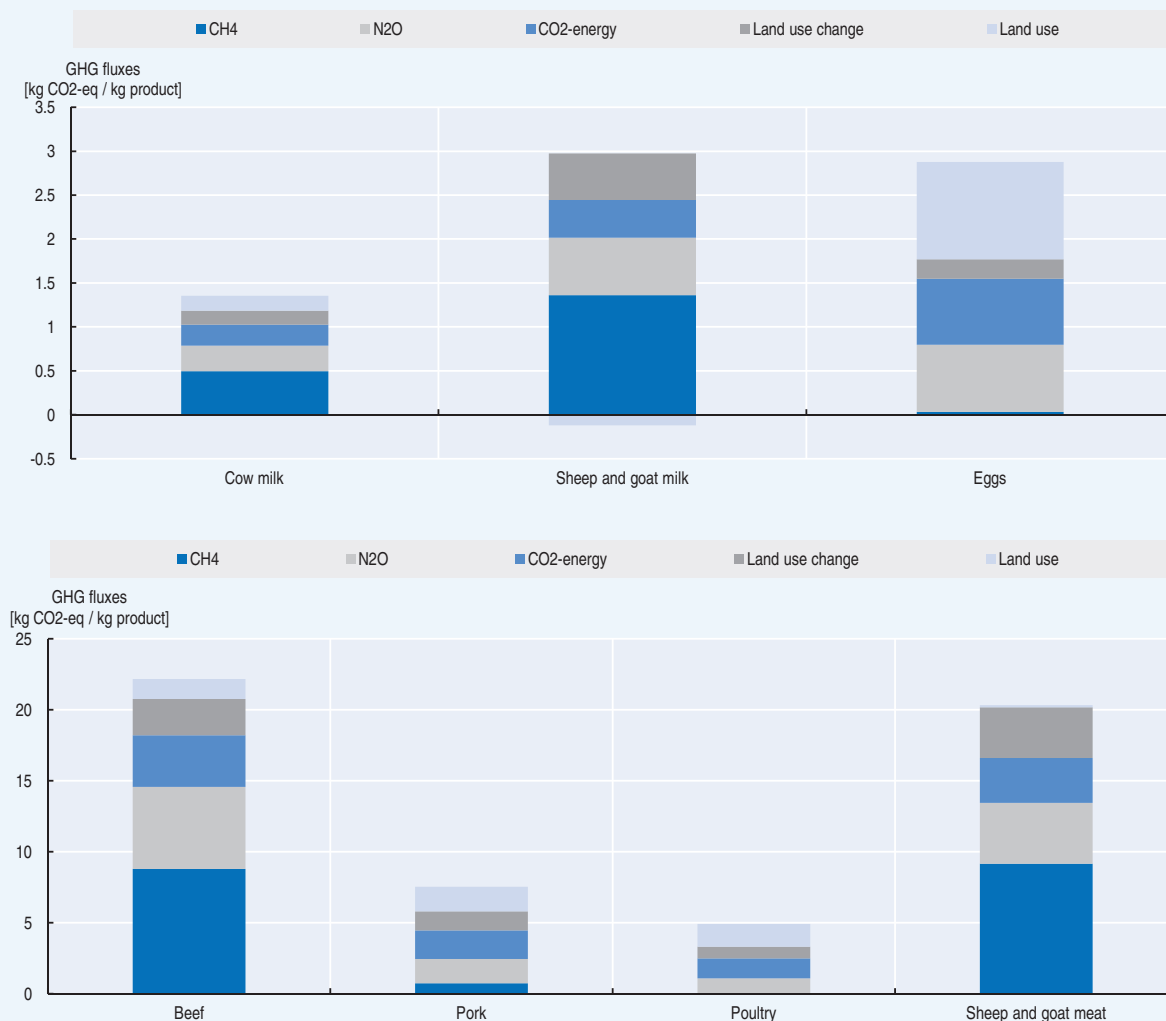
Past studies have evaluated GHG emissions from animal production following a Life Cycle Assessment (LCA). The 2006 FAO study livestock's long shadow<sup>1</sup> as well as a follow-up report published in 2010<sup>2</sup> concluded that both livestock and the dairy sectors significantly contribute to global human-related GHG emissions.

Recently, a detailed regional analysis of total GHG emissions using an LCA approach, for the 27 countries of the European Union has also been carried out by the EC Joint Research Centre<sup>3</sup> using the CAPRI model. Total net GHG emissions of EU livestock production was estimated at 661 mt of carbon dioxide equivalents (CO<sub>2</sub>-eq), which represent between 9 to 13% of total GHG emissions estimated for the EU agricultural sector, depending if emissions from land use and land use change are excluded or not. Of those emissions, 23% are emitted as methane, 24% as nitrous oxide (including cultivation of feed crops) and the industrial production of mineral fertilisers), 21% as CO<sub>2</sub> from direct and indirect energy use and 29% as CO<sub>2</sub> from land use and land use change. As presented in the figure below, ruminants (cows, sheep and goats) have the highest carbon footprint per kg produced, with beef production as the most-emitting activity.

The EC study has assessed some policy options to mitigate livestock emissions namely an emission standard applied across the EU, tradable emission permits and livestock emission taxes, pointing out that without a global policy framework any policy options put in place to mitigate livestock emissions will result in a considerable reduction in their effectiveness through emissions leakage (*i.e.* as a result of higher net imports of feed and meat products).

## Box 7.2. Greenhouse gas emissions from livestock production in the European Union (cont.)

Figure 7.5. Total GHG emissions of beef, pork, poultry and sheep and goat meat produced in EU27 in 2004, calculated with a cradle-to-gate life-cycle analysis with CAPRI



Source: See footnote 3.

StatLink  <http://dx.doi.org/10.1787/888932427132>

1. FAO (2006), Livestock's long shadow – environmental issues and options, Food and Agriculture Organization of the United Nations, Rome.
2. FAO (2010), Greenhouse Gas Emissions from the Dairy Sector. A Life Cycle Assessment, Food and Agriculture Organization of the United Nations.
3. Leip A., F. Weiss, T. Wassenaar, I. Pérez Domínguez, T. Fellmann, P. Loudjani, F. Tubiello, D. Grandgirard, S. Monni and K. Biala (2010), The GGELS Project: European Greenhouse Gases Emissions from Livestock Production Systems (LPS), Dictus Publishing, 108pp.



## ANNEX 7.A

*Statistical tables: Meat*

7.A.1. World meat projections

<http://dx.doi.org/10.1787/888932428063>

*Tables available online :*

7.A.2.1. Beef and veal projections: production and trade

<http://dx.doi.org/10.1787/888932428082>

7.A.2.2. Beef and veal projections: consumption, per capita

<http://dx.doi.org/10.1787/888932428101>

7.A.3.1. Pig meat projections: production and trade

<http://dx.doi.org/10.1787/888932428120>

7.A.3.2. Pig meat projections: consumption, per capita

<http://dx.doi.org/10.1787/888932428139>

7.A.4.1. Poultry meat projections: production and trade

<http://dx.doi.org/10.1787/888932428158>

7.A.4.2. Poultry meat projections: consumption, per capita

<http://dx.doi.org/10.1787/888932428177>

7.A.5.1. Sheep meat projections: production and trade

<http://dx.doi.org/10.1787/888932428196>

7.A.5.2. Sheep meat projections: consumption, per capita

<http://dx.doi.org/10.1787/888932428215>

7.A.6. Main policy assumptions for meat markets

<http://dx.doi.org/10.1787/888932428234>

**Table 7.A.1. World meat projections**

Calendar year

		Avg 2008-10	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
<b>OECD<sup>1</sup></b>												
<b>BEEF AND VEAL</b>												
Production	kt cwe	27 537	27 009	26 651	27 012	27 426	27 806	28 084	28 227	28 450	28 632	28 749
Consumption	kt cwe	27 211	26 699	26 487	26 732	27 110	27 469	27 791	27 983	28 242	28 463	28 570
<b>PIG MEAT</b>												
Production	kt cwe	39 548	38 882	39 406	39 857	40 088	40 149	40 539	41 148	41 408	41 537	42 067
Consumption	kt cwe	37 104	36 568	37 101	37 460	37 747	37 803	38 164	38 746	39 054	39 138	39 628
<b>POULTRY MEAT</b>												
Production	kt rtc	40 205	41 095	41 766	42 385	42 984	43 622	44 345	45 064	45 736	46 378	47 093
Consumption	kt rtc	37 899	38 975	39 508	40 132	40 752	41 428	42 144	42 802	43 444	44 040	44 706
<b>SHEEP MEAT</b>												
Production	kt cwe	2 605	2 513	2 519	2 516	2 534	2 547	2 548	2 558	2 560	2 569	2 579
Consumption	kt cwe	2 151	2 052	2 040	2 027	2 014	2 012	1 994	1 995	1 983	1 984	1 986
<b>TOTAL MEAT</b>												
Per capita consumption	kg rwt	65.6	64.9	65.1	65.5	65.9	66.3	66.8	67.4	67.8	68.0	68.5
<b>NON-OECD</b>												
<b>BEEF AND VEAL</b>												
Production	kt cwe	37 921	38 224	39 040	39 867	40 688	41 418	42 149	42 924	43 681	44 542	45 378
Consumption	kt cwe	37 410	37 997	38 671	39 551	40 346	41 081	41 835	42 597	43 287	44 117	45 019
<b>PIG MEAT</b>												
Production	kt cwe	66 739	70 606	72 550	73 636	75 374	76 616	78 663	79 889	81 849	83 445	85 232
Consumption	kt cwe	68 601	72 488	74 252	75 408	77 098	78 362	80 438	81 677	83 589	85 225	87 051
<b>POULTRY MEAT</b>												
Production	kt rtc	54 814	59 020	60 436	62 172	63 841	65 852	67 749	69 640	71 491	73 490	75 317
Consumption	kt rtc	57 257	61 160	62 666	64 397	66 065	68 063	69 995	71 937	73 840	75 880	77 784
<b>SHEEP MEAT</b>												
Production	kt cwe	10 227	10 614	10 894	11 159	11 418	11 675	11 958	12 215	12 522	12 794	13 094
Consumption	kt cwe	10 615	11 011	11 304	11 585	11 870	12 143	12 446	12 712	13 034	13 313	13 621
<b>TOTAL MEAT</b>												
Per capita consumption	kg rwt	25.0	25.7	25.9	26.2	26.5	26.7	27.1	27.4	27.7	28.0	28.3
<b>WORLD</b>												
<b>BEEF AND VEAL</b>												
Production	kt cwe	65 458	65 233	65 691	66 878	68 114	69 224	70 233	71 151	72 130	73 173	74 127
Consumption	kt cwe	64 620	64 696	65 158	66 283	67 456	68 550	69 626	70 580	71 529	72 580	73 589
Price, EU <sup>2</sup>	USD/t dw	4 417	4 328	4 414	4 442	4 744	4 800	4 901	4 864	4 873	4 814	4 788
Price, USA <sup>3</sup>	USD/t dw	3 211	3 656	3 579	3 554	3 593	3 531	3 631	3 710	3 727	3 689	3 779
Price, Brazil <sup>4</sup>	USD/t dw	2 716	2 914	2 757	2 751	2 709	2 808	2 819	2 845	2 828	2 883	2 857
<b>PIG MEAT</b>												
Production	kt cwe	106 287	109 487	111 956	113 492	115 462	116 765	119 203	121 038	123 257	124 982	127 299
Consumption	kt cwe	105 705	109 055	111 353	112 868	114 845	116 165	118 603	120 424	122 643	124 363	126 679
Price, EU <sup>5</sup>	USD/t dw	2 098.0	2 264.8	2 525.4	2 575.9	2 439.8	2 354.6	2 483.7	2 535.6	2 562.5	2 647.9	2 557.5
Price, Brazil <sup>6</sup>	USD/t dw	1 410	1 558	1 575	1 597	1 479	1 462	1 522	1 606	1 595	1 675	1 617
Price, USA <sup>7</sup>	USD/t dw	1 471	1 743	1 958	1 916	1 811	1 748	1 871	1 911	1 921	1 869	1 860
<b>POULTRY MEAT</b>												
Production	kt rtc	95 019	100 115	102 202	104 557	106 826	109 473	112 094	114 704	117 228	119 868	122 411
Consumption	kt rtc	95 156	100 135	102 174	104 529	106 817	109 491	112 140	114 739	117 284	119 920	122 489
Price, EU <sup>8</sup>	USD/t pw	2 456.9	2 640.6	2 588.6	2 555.0	2 547.2	2 521.9	2 545.0	2 577.1	2 593.5	2 616.6	2 614.6
Price, Brazil <sup>9</sup>	USD/t rtc	1 090	1 261	1 256	1 200	1 218	1 221	1 231	1 247	1 258	1 271	1 266
Price, USA <sup>10</sup>	USD/t rtc	1 062	1 153	1 221	1 251	1 240	1 201	1 222	1 220	1 254	1 231	1 250
<b>SHEEP MEAT</b>												
Production	kt cwe	12 832	13 126	13 413	13 676	13 952	14 221	14 506	14 772	15 082	15 363	15 673
Consumption	kt cwe	12 766	13 063	13 345	13 612	13 883	14 155	14 440	14 706	15 018	15 297	15 607
Price, New Zealand <sup>11</sup>	USD/t dw	2 948	3 659	3 452	3 336	3 364	3 338	3 460	3 468	3 526	3 515	3 548
<b>TOTAL MEAT</b>												
Per capita consumption	kg rwt	32.6	32.9	33.1	33.3	33.6	33.8	34.2	34.5	34.8	35.0	35.4

Note: Calendar Year: Year ending 30 September for New Zealand.

1. Excludes Iceland but includes EU6 members that are not members of the OECD (Bulgaria, Cyprus, Latvia, Lithuania, Malta and Romania).
2. EU average beef producer price.
3. Choice steers, 1100-1300 lb lw, Nebraska - lw to dw conversion factor 0.63.
4. Brazil average beef producer price.
5. EU average pig meat producer price.
6. Brazil average pig meat producer price.
7. Barrows and gilts, No. 1-3, 230-250 lb lw, Iowa/South Minnesota - lw to dw conversion factor 0.74.
8. EU average chicken producer price.
9. Brazil average chicken producer price.
10. Wholesale weighted average broiler price 12 cities.
11. Lamb schedule price, all grade average.

Source: OECD and FAO Secretariats.

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