



**Intesco
Research
Group**

MEAT AND WORLD MEAT MARKET



MOSCOW 2014

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ABOUT INTESCO RESEARCH GROUP COMPANY

RESEARCH METHODOLOGY

Subject of the research:

WORLD MEAT MARKET

Goal of research:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR 2014-2016

Region of research:

COUNTRIES AND WORLD REGIONS

Main blocks of research:

GENERAL ECONOMIC PARAMETERS IN THE WORLD

TRENDS ON WORLD MEAT MARKET

FACTORS INFLUENCING MEAT MARKET

STATE REGULATIONS OF WORLD MEAT MARKET

WORLD LIVESTOCK

AGGREGATE DEMAND AND SUPPLY BALANCE ON THE WORLD MEAT MARKET

MEAT PRODUCTION AND CONSUMPTION IN THE WORLD

MEAT CONSUMPTION IN RF

WORLD MEAT IMPORT

WORLD MEAT EXPORT

FORECAST OF WORLD MEAT MARKET FOR 2014-2016

Information sources used:

Federal State Statistics Service

Economic Development Ministry

Federal Customs Service

Federal Tax Service

Field expert evaluations

Retail sale reports

Materials of the field's main players

Field print and electronic publications

The research contains 30 schedules, 29 diagrams, 29 tables and 2 schemes.

EXTRACTS FROM RESEARCH

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WORLD LIVESTOCK

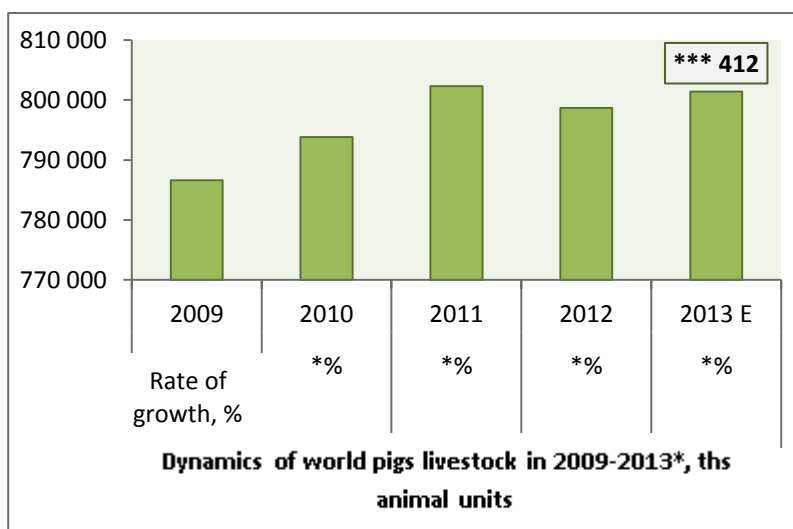
On meat markets dependence on weather conditions generally expresses is mediated, through movement of the prices of forages and a status of pastures. However unlike the markets of crop production in unfavorable years level of meat production increases at the expense of an excess slaughter, and recession is of delayed character. Seasonal recurrence is connected to alternation of phases of sagination and slaughter. As a result of abnormally droughty years (2009-2011) indexes of cattle livestock decreased sharply. In 2009 cattle livestock in the world made ** billion 25 million animal units.

Industrial pig-breeding is developed generally in economically developed countries and countries with transitional economy. Pigs livestock breeding in developed

countries is directed on meat sagination of cattle, and bacon especially. By 2013 world pigs slaughter livestock made ** million animal units that was 2% more than the parameter of 2009.



Dynamics of cattle livestock in the world in 2009-2013*, the animal units



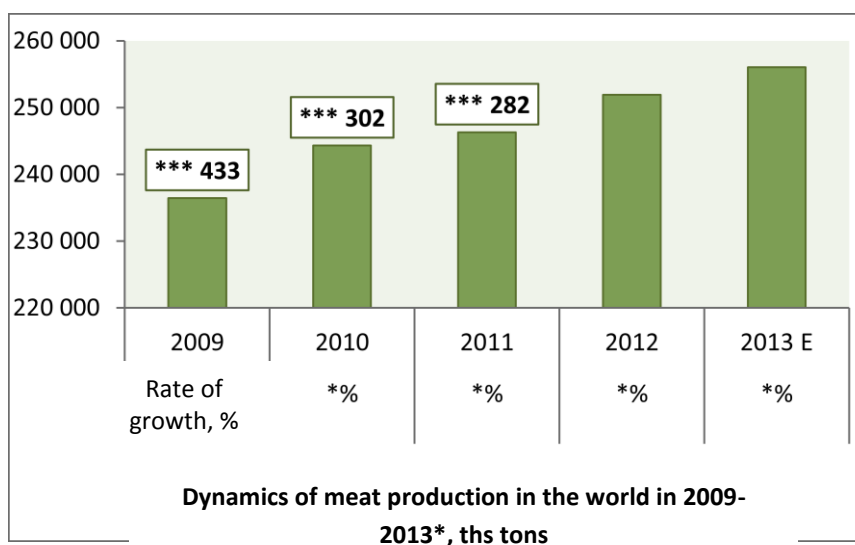
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AGGREGATE DEMAND AND SUPPLY BALANCE OF THE WORLD MEAT MARKET

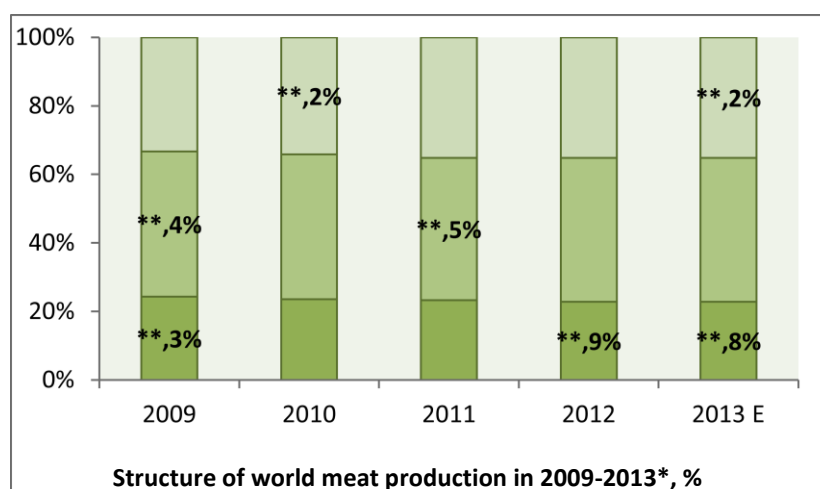
Meat production is based on animal husbandry of several directions – cattle breeding, pig-breeding and poultry farming. The most quality meat is received by specialized sagination of meat breeds animals. During five years (2009-2013) meat production in the world increased by **% (** million tons). Growth was smooth, generally due to increase in structure of poultry and pork share. In 2013, rate of growth made **%, having held the tendency of 2012.

In world meat production structure since 2009-2013 specific weight of pork made (**%), holding the parameter at one level.



Poultry ranked second, having increased the share to 35% by 2013 (*% more than in 2009). The beef

share by 2013 made **,8%, for the entire period the decrease was equal to 2%. Change of production structure was affected by profitability level which decreases cattle meat, and increases poultry and pork.



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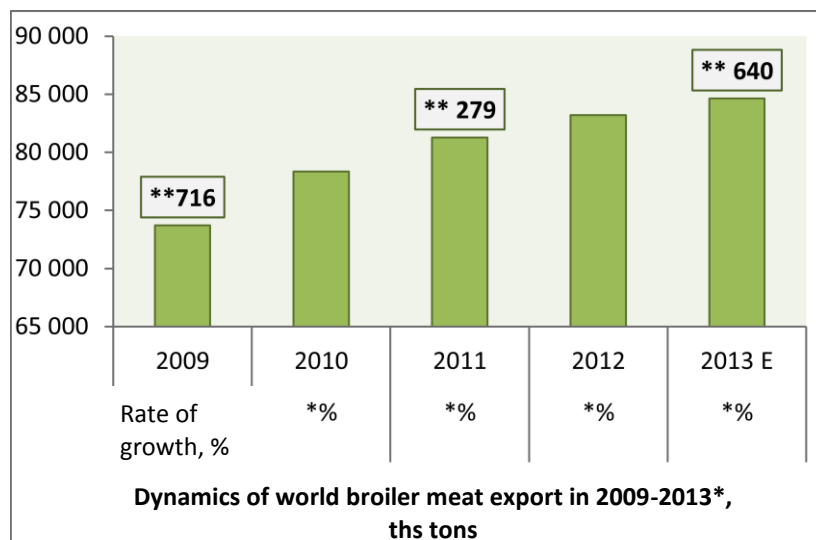
WORLD MEAT EXPORT

World broiler meat export by 2013 increased by **% (compared to 2009). In 2009 the world exported *,4 mln tons of chicken meat, in 2013 world export reached 10,3 mln tons of meat (11 and *% of the world production volume respectively).

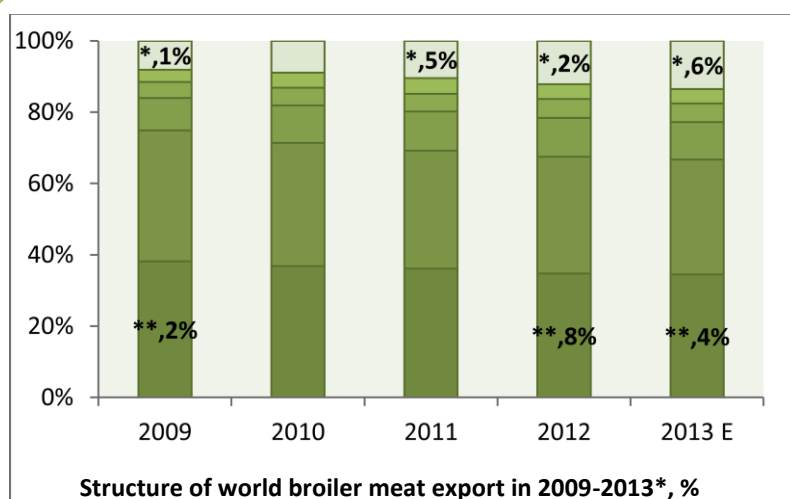
In the designated five years, not only export volume increased, but also its share in poultry meat distribution structure.

The greatest rate of world export growth (7%) was marked in 2011, stimulated due to growing regional demand in Latin America (Chile and Venezuela).

The greatest volumes of broiler meat on the export market were delivered by USA and Brazil.



By 2013 specific weight of both countries reduced by 4% compared to 2009, and made **,4 and **,2% respectively.



The share of such countries exporting chicken meat as EU, Thailand and China, during five years (from 2009-2013) increased ranging from ** to **%. Export growth from Thailand and China came after the termination of the bird flu epidemic in South East Asia, and cancelling of the prohibition on broiler meat import from these states.

Specific weight of the remaining countries increased from **,1 to **,6%, due to expansion of productions of poultry farming sector in Argentina, Turkey, Ukraine.

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LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

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ABOUT INTESCO RESEARCH GROUP COMPANY

ABOUT INTESCO RESEARCH GROUP

INTESCO RESEARCH GROUP is the analytical agency, specializing in development of high-quality business plans, feasibility studies and marketing researches on federal and regional levels. We provide our clients with up-to-date and accurate information, professional recommendations for conducting business.

All works of **INTESCO RESEARCH GROUP** are based on the proven investigation methods. When conducting marketing researches and developing the business plans the agency applies the worldwide accepted methods of investments efficiency evaluation and they are based on the Russian and international quality standards.

Analysts of **INTESCO RESEARCH GROUP** are the graduates of the leading Moscow institutions of higher education (Moscow State University, Moscow Institute of Physics and Technology, Russian academy of economics named after Plekhanov, Higher School of Economics, State University of Economics and Finance) and have deep knowledge in marketing, methods of marketing research arrangement, investment projects efficiency evaluation, preparing the analytical reports and business-forecasting.

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OUR CLIENTS



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E-mail: info@i-plan.ru

Web-site: www.i-plan.ru

Tel.: +7 (495) 212-91-91