

**Intesco
Research
Group**

MEAT AND WORLD MEAT MARKET



MOSCOW 2014

CONTENTS

CONTENTS.....	3
RESEARCH METHODOLOGY.....	6
EXTRACTS FROM RESEARCH.....	7
LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES	10
ABOUT INTESCO RESEARCH GROUP	13

CONTENTS

RESEARCH METHODOLOGY

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

1. GENERAL ECONOMIC PARAMETERS IN THE WORLD

- 1.1. GDP (by PPP) by countries of the world
- 1.2. Living standards by countries of the world
- 1.3. Number and density of population by regions and countries of the world

2. SUBJECT OF RESEARCH

- 2.1. Definition
- 2.2. Veterinary and sanitary standards
- 2.3. Classification of animal meat
- 2.4. Poultry meat classification

3. TRENDS ON THE WORLD MEAT MARKET

- 3.1. Country differentiation of goods
- 3.2. Change of demand for meat structure
- 3.3. Improvement of meat quality and environmental friendliness
- 3.4. Agricultural holdings creation
- 3.5. Extension of sales markets
- 3.6. Supply structure change on meat and meat products market

4. FACTORS INFLUENCING MEAT MARKET

- 4.1. Feed supplies
- 4.2. Speed of slaughter weight achievement by animals
- 4.3. Periods of animals slaughter
- 4.4. Requirements to meat quality
- 4.5. Purchasing power
- 4.6. Russian and world producer price for meat index
- 4.7. Consumer and producers prices for meat index in Russia
- 4.8. Epidemiologic situation
- 4.9. Green production

5. STATE REGULATIONS OF WORLD MEAT MARKET

- 5.1. Veterinary and sanitary norms and standards of countries
- 5.2. Customs unions
- 5.3. Organization for Economic Cooperation and Development
- 5.4. World Trade Organization
- 5.5. International Office of Epizootics

6. WORLD LIVESTOCK

- 6.1. Cattle

Dynamics of world cattle livestock by years

Structure of cattle livestock by countries

Structure and dynamics of world cattle livestock import

Structure and dynamics of world cattle livestock export

6.2. Pigs

Dynamics of world pigs livestock by years

Structure of world pigs livestock by countries

Structure and dynamics of world pigs livestock import

Dynamics and structure of world pigs livestock export

7. AGGREGATE DEMAND AND SUPPLY BALANCE ON THE WORLD MEAT MARKET

7.1. Structure and dynamics of aggregate meat production and consumption in the world

Dynamics of world production by years

Structure of world production by types

Dynamics of world consumption by years

Structure of world consumption by types

7.2. Structure and dynamics of world meat import and export

Dynamics of world import by years

Structure of world import by types

Dynamics of world export by years

Structure of world export by types

8. MEAT PRODUCTION AND CONSUMPTION IN THE WORLD

8.1. Beef

Dynamics of beef production and consumption by years

Beef production structure by countries

Beef consumption structure by countries

8.2. Pork

Dynamics of pork production and consumption by years

Pork production structure by countries

Pork consumption structure by countries

8.3. Poultry meat

Dynamics of poultry meat production and consumption by years

Poultry meat production structure by countries

Poultry meat consumption structure by countries

8.4. Turkey meat

Dynamics of turkey meat production and consumption by years

Turkey meat production structure by countries

Turkey meat consumption structure by countries

9. MEAT CONSUMPTION IN RF

9.1. Beef consumption

9.2. Pork consumption

- 9.3. Poultry meat consumption
- 9.4. Turkey meat consumption
- 9.5. Meat consumption structure by types in RF
- 9.6. Meat consumption structure dynamics in RF by types

10. WORLD MEAT IMPORT

10.1. Beef

Beef import dynamics by years

Beef import structure by countries

10.2. Pork

Pork import dynamics by years

Pork import structure by countries

10.3. Poultry meat

Poultry meat import dynamics by years

Poultry meat import structure by countries

10.4. Turkey meat

Turkey meat import dynamics by years

Turkey meat import structure by countries

11. WORLD MEAT EXPORT

11.1. Beef

Beef export dynamics by years

Beef export structure by countries

11.2. Pork

Pork export dynamics by years

Pork export structure by countries

11.3. Poultry meat

Poultry meat export dynamics by years

Poultry meat export structure by countries

11.4. Turkey meat

Turkey meat export dynamics by years

Turkey meat export structure by countries

12. FORECAST OF WORLD MEAT MARKET FOR 2014-2016

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

CHAPTER 6

WORLD LIVESTOCK

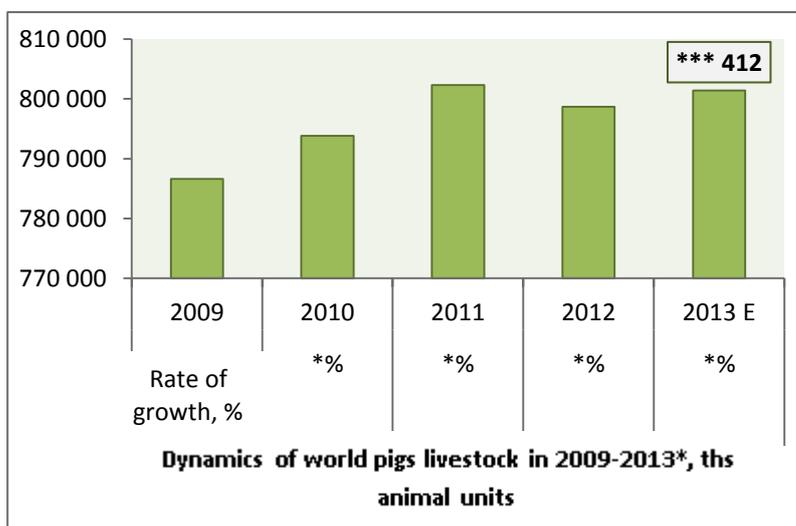
On meat markets dependence on weather conditions generally expresses is mediated, through movement of the prices of forages and a status of pastures. However unlike the markets of crop production in unfavorable years level of meat production increases at the expense of an excess slaughter, and recession 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*, ths animal units



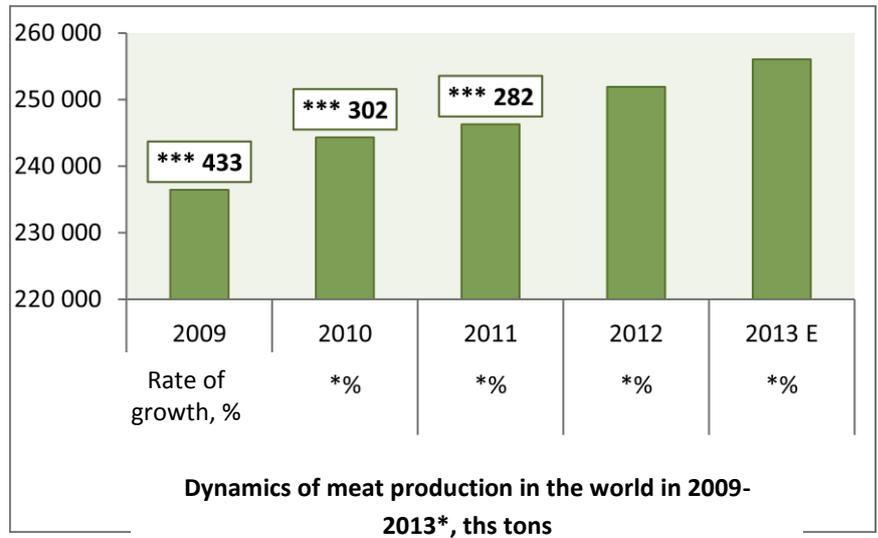
Dynamics of world pigs livestock in 2009-2013*, ths animal units

CHAPTER 7

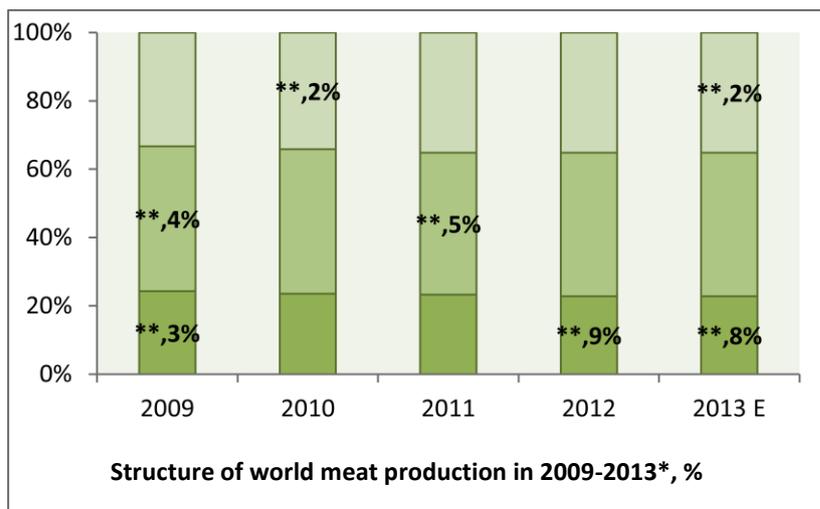
AGGREGATE DEMAND AND SUPPLY BALANCE OF THE WORLD MEAT MARKET

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.



CHAPTER 11

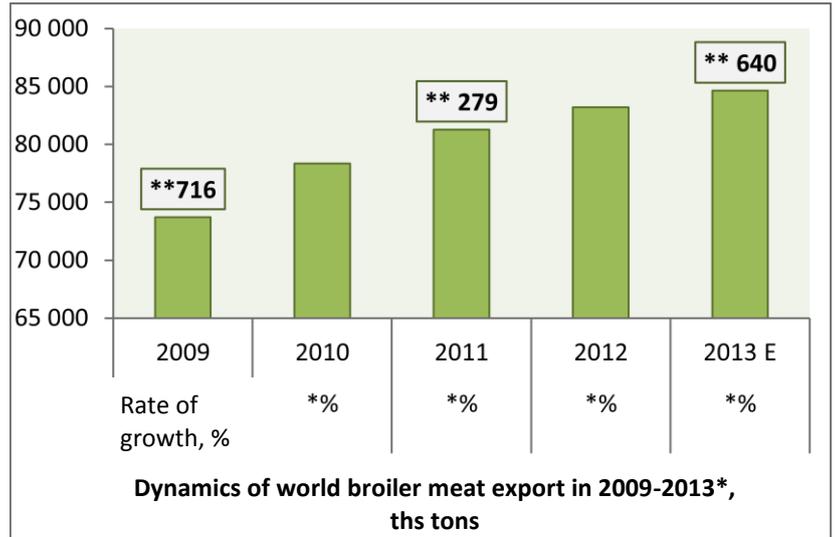
WORLD MEAT EXPORT

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).

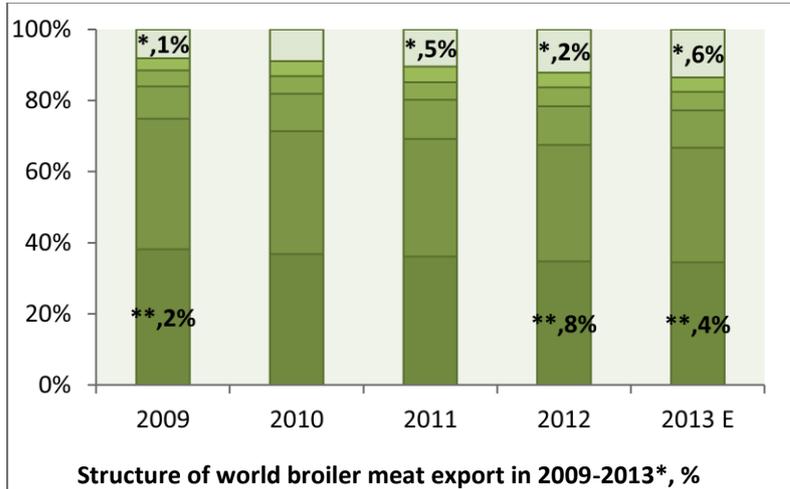
In the designated five years, not only export volume increased, but also its share in poultry meat distribution structure.

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.

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

RESEARCH METHODOLOGY

LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

1. GENERAL ECONOMIC PARAMETERS IN THE WORLD

Table 1. Rating of countries according to their GDP (by PPP) in 2013 in mln dollars

Table 2. Rating of countries by prosperity index in 2013

Table 3. Rating of the most populated countries of the world from May 2010 to September 2013

Schedule 1. Number of population of countries with different development levels according to forecast in 1950-2100, billion people

2. SUBJECT OF RESEARCH

Table 4. Meat classification methods

Scheme 1. Poultry meat classification

3. TRENDS ON THE WORLD MEAT MARKET

4. FACTORS INFLUENCING MEAT MARKET

Schedule 2. Producer price index for meat in RF and in the world in 2000-2013

Table 5. Parameters of producer prices for meat index for the world and RF in 2000-2013

Schedule 3. Dynamics of consumer price and producer price index for meat in RF in 2006-2013

Table 6. Parameters of consumer and producer price index for meat in RF in 2006-2013

5. STATE REGULATIONS OF WORLD MEAT MARKET

6. WORLD LIVESTOCK

Schedule 4. Dynamics of cattle livestock in the world in 2009-2013*, ths animal units

Table 7. Cattle livestock in the world in 2009-2013*, ths animal units

Diagram 1. Structure of world cattle livestock in 2009-2013*, %

Schedule 5. Dynamics of world cattle livestock import in 2009-2013*, ths animal units

Table 8. Volume of cattle livestock import by countries in 2009-2013*, ths animal units

Diagram 2. Structure of world cattle livestock import in 2009-2013, %

Schedule 6. Dynamics of world cattle livestock export in 2009-2013*, ths animal units

Table 9. Volume of cattle livestock export by countries in 2009-2013*, ths animal units

Diagram 3. Structure of world cattle livestock export in 2009-2013, %

Schedule 7. Dynamics of world pigs livestock in 2009-2013*, ths animal units

Table 10. Pigs livestock in the world in 2009-2013*, ths animal units

Diagram 4. Structure of world pigs livestock in 2009-2013*, %

Schedule 8. Dynamics of world pigs livestock import in 2009-2013*, ths animal units

Table 11. Pigs import volume by countries in 2009-2013*, ths animal units

Diagram 5. Structure of world pigs livestock import in 2009-2013, %

Schedule 9. Dynamics of world pigs export in 2009-2013*, ths animal units

Table 12. Pigs livestock export volume by countries in 2009-2013*, ths animal units

Diagram 6. Structure of world pigs livestock export in 2009-2013, %

7. AGGREGATE DEMAND AND SUPPLY BALANCE ON THE WORLD MEAT MARKETC

Schedule 10. Dynamics of meat production in the world in 2009-2013*, ths tons

Diagram 7. Structure of world meat production in 2009-2013*, %

Schedule 11. Dynamics of meat consumption in the world in 2009-2013*, ths tons

Diagram 8. Structure of world meat consumption in 2009-2013*, %

Schedule 12. Dynamics of world meat import in 2009-2013*, ths tons

Diagram 9. Structure of world meat import in 2009-2013*, %

Schedule 13. Dynamics of world meat export in 2009-2013*, ths tons

Diagram 10. Structure of world meat export in 2009-2013*, %

8. MEAT PRODUCTION AND CONSUMPTION IN THE WORLD

Schedule 14. Production and consumption of beef and baby-beef in the world in 2009-2013*, ths tons

Table 13. Beef and baby-beef production volume by countries in 2009-2013*, ths tons

Diagram 11. Structure of world beef and baby-beef production in 2009-2013*, %

Table 14. Beef and baby-beef consumption volume by countries in 2009-2013*, ths tons

Diagram 12. Structure of world beef and baby-beef consumption in 2009-2013*, %

Schedule 15. Pork production and consumption in the world in 2009-2013*, ths tons

Table 15. Pork production volume by countries in 2009-2013*, ths tons

Diagram 13. Structure of world pigs production in 2009-2013*, ths tons

Table 16. World pork consumption level by countries in 2009-2013*, ths tons

Diagram 14. Structure of world pigs consumption in the world in 2009-2013*, %

Schedule 16. Broilers meat production and consumption in the world in 2009-2013*, ths tons

Table 17. Broiler meat production volume by countries in 2009-2013*, ths tons

Diagram 15. Structure of world broiler meat production in 2009-2013*, %

Table 18. Broiler meat consumption volume by countries in 2009-2013*, ths tons

Diagram 16. Structure of world broiler meat consumption in 2009-2013*, %

Schedule 17. Turkey meat production and consumption in the world in 2009-2013*, ths tons

Table 19. Turkey meat world production volume by countries in 2009-2013*, ths tons

Diagram 17. Structure of world turkey meat production in 2009-2013*, %

Table 20. Turkey meat consumption volume by countries in 2009-2013*, ths tons

Diagram 18. Broiler meat consumption structure in the world in 2009-2013*, %

9. MEAT CONSUMPTION IN RF

Schedule 18. Beef consumption in RF compared to the largest consuming countries in 2009-2013*, ths tons

Schedule 19. Pork consumption in RF compared to the largest consuming countries in 2009-2013*, ths tons

Schedule 20. Poultry meat consumption in RF compared to the largest consuming countries in 2009-2013*, ths tons

Schedule 21. Turkey meat consumption in RF compared to the largest consuming countries in 2009-2013*, ths tons

Diagram 19. Meat consumption structure by types in RF in 2013*, %

Diagram 20. Meat consumption structure dynamics by types in RF in 2009-2013*, %

10. WORLD MEAT IMPORT

Schedule 22. Dynamics of world beef and baby-beef import in 2009-2013*, ths tons

Table 21. Beef and baby-beef import volume by countries in 2009-2013*, ths

Diagram 21. Structure of world beef and baby-beef import in 2009-2013*, %

Schedule 23. Dynamics of world pork import in 2009-2013*, ths tons

Table 22. Pork import volume by countries in 2009-2013*, ths tons

Diagram 22. Structure of world pork import in 2009-2013*, %

Schedule 24. Dynamics of world broiler meat import in 2009-2013*, ths tons

Table 23. Broiler meat import volume by countries in 2009-2013*, ths tons

Diagram 23. Structure of world broiler meat import in 2009-2013*, %

Schedule 25. Dynamics of world turkey meat import in 2009-2013*, ths tons

Table 24. Turkey meat import volume by countries in 2009-2013*, ths tons

Diagram 24. Structure of world turkey meat import in 2009-2013*, %

11. WORLD MEAT EXPORT

Table 25. Leading countries exporting meat in the world in 2009-2013

Schedule 26. Dynamics of world beef and baby-beef export in 2009-2013*, ths tons

Table 26. Beef and baby beef export volume by countries in 2009-2013*, ths tons

Diagram 25. Structure of world beef and baby-beef export in 2009-2013*, %

Schedule 27. Dynamics of world pork export in 2009—2013*, ths tons

Table 27. Pork export volume by countries in 2009-2013*, ths animal units

Diagram 26. Structure of world pork export in 2009-2013*, %

Schedule 28. Dynamics of world broiler meat export in 2009-2013*, ths tons

Table 28. Broiler meat export volume by countries in 2009-2013*, ths tons

Diagram 27. Structure of world broiler meat export in 2009-2013*, %

Schedule 29. Dynamics of world turkey meat export in 2009-2013*, ths tons

Table 29. Turkey meat export volume by countries in 2009-2013*, ths tons

Diagram 28. Structure of world turkey meat export in 2009-2013*, %

12. FORECAST OF WORLD MEAT MARKET FOR 2014-2016

Schedule 30. Dynamics of world production and meat consumption of all types in 2009-2013 and forecast for 2014-2016

Diagram 29. Structure of world poultry meat production by types in 2014, %

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.

Professional approach and service, high-quality specialists, deep knowledge of various markets, broad design experience and constant improvement allow the **INTESCO RESEARCH GROUP** to provide the high-quality service to all the clients.

Information from our reports is published in the largest Russian newspapers and magazines: “Vedomosti”, “Kommersant-Dengi”, “Rossiyskaya gazeta”, “Forbes”, “Russian Food Market”, “FoodService”, “MAXIM”, “Partner: myasopererabotka”, “Moe delo. Magazin”, “Odnako”, “Khlebopekarnoe proizvodstvo”, “Producty i Pribyl”, “Konditerskaya sfera/khlebopechenie”, “Tsenovik”, “RBK daily”, “Unipack.Ru”, etc.

OUR CLIENTS



**PURPOSE OF OUR COMPANY IS TO ENSURE THE SUCCESSFUL
IMPLEMENTATION OF BUSINESS PROJECTS OF OUR CLIENTS**

E-mail: info@i-plan.ru

Web-site: www.i-plan.ru

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