



**Figure 1.4**

Value of global meat production, 1961–2014 (constant 2004–2006 US\$)

Source: FAO 2019.

The global meat industry now consumes more animals, which also means using more feed grains, more land, and more water. As it has expanded production, the economic value of the global meat industry has grown, more than doubling just since 1990. All the while, the geographic reach of the meat industry has expanded to encompass the globe as never before. This geographic expansion, of course, has depended on the increased international trade of meat.

### Trade in the Global Meat Industry

In addition to production, consumption, and value, taking a close look at the dynamics of international trade also helps to illuminate the contours of the global meat industry. Just as global meat production and consumption have increased, so too has international trade in meat. From 1960 to 2015, the meat exports increased from 2.6 MMT to 27 MMT. And since the 1990s,

the global meat trade has expanded most rapidly, more than doubling from 12.6 MMT to 27 MMT in just eighteen years, from 1998 to 2015. Similar amounts of each type of meat are exported: in 2015, 10 MMT of beef and chicken along with 7 MMT of pork. Given the total production of each type of meat (see figure 1.2), beef is exported at the highest rate (16 percent of overall beef production in 2015), then chicken (11.6 percent), followed by pork (6.5 percent). As with production and consumption, of course, there is a geographic component to trade in the global meat industry. Which countries are the primary exporters and importers in the world?

A substantial portion of meat exports comes from countries in the global north. And geographically, the global meat industry is anchored by exports from North and South America. Table 1.1 shows the world's leading exporter of beef, pork, and chicken in 2015. Among these leading meat-exporting countries, Brazil and the United States stand out as the top exporters of each type of meat: Brazil was first in chicken, third in beef, and

**Table 1.1**  
Top five countries for global meat exports, 2015

|         | Country       | Total exports (MMT) | Percent of world exports | Total market share (percent) |
|---------|---------------|---------------------|--------------------------|------------------------------|
| Beef    | Australia     | 1.854               | 19.4                     | 73.6                         |
|         | India         | 1.806               | 18.9                     |                              |
|         | Brazil        | 1.705               | 17.8                     |                              |
|         | United States | 1.028               | 10.8                     |                              |
|         | New Zealand   | 0.639               | 6.7                      |                              |
| Pork    | EU            | 2.388               | 33.1                     | 93.2                         |
|         | United States | 2.241               | 31.1                     |                              |
|         | Canada        | 1.236               | 17.1                     |                              |
|         | Brazil        | 0.627               | 8.7                      |                              |
|         | China         | 0.231               | 3.2                      |                              |
| Chicken | Brazil        | 3.841               | 37.4                     | 86.6                         |
|         | United States | 2.866               | 27.9                     |                              |
|         | EU            | 1.177               | 11.5                     |                              |
|         | Thailand      | 0.622               | 6.1                      |                              |
|         | China         | 0.401               | 3.9                      |                              |

*Source:* Calculated using data from USDA FAS n.d.

fourth in pork; and the United States is second in pork and chicken, and fourth in beef. In addition, it is also noteworthy that two exporters dominate the markets in pork and chicken—the European Union and United States in pork, and Brazil and the United States in chicken—while the beef export market is more evenly divided among three or four exporters. India stands out among beef exporters as the world's second-leading exporter of beef in 2015.<sup>3</sup> The countries accounting for at least 10 percent of exports of meat include Australia, Brazil, Canada, the EU, India, and the United States. Therefore, we can see that much exported meat comes from countries in the global north, and the Americas figure prominently in this export.

The pattern of global meat imports is different from that of exports, with countries in Asia and emerging industrial countries accounting for a substantial portion of global meat imports. Table 1.2 shows the countries that imported the most beef, pork, and chicken. Among these leading meat-importing countries, Japan is the most notable. In 2015, Japan was

**Table 1.2**

Top five countries for global meat imports, 2015

|         | Country       | Total imports (MMT) | Percent of world imports | Total market share (percent) |
|---------|---------------|---------------------|--------------------------|------------------------------|
| Beef    | United States | 1.529               | 20.2                     | 51.9                         |
|         | Japan         | 0.707               | 9.3                      |                              |
|         | China         | 0.663               | 8.7                      |                              |
|         | Russia        | 0.625               | 8.2                      |                              |
|         | South Korea   | 0.414               | 5.5                      |                              |
| Pork    | Japan         | 1.270               | 19.0                     | 65.6                         |
|         | China         | 1.029               | 15.4                     |                              |
|         | Mexico        | 0.981               | 14.7                     |                              |
|         | South Korea   | 0.599               | 9.0                      |                              |
|         | United States | 0.504               | 7.5                      |                              |
| Chicken | Japan         | 0.936               | 10.8                     | 46.4                         |
|         | Saudi Arabia  | 0.930               | 10.7                     |                              |
|         | Mexico        | 0.790               | 9.1                      |                              |
|         | EU            | 0.728               | 8.4                      |                              |
|         | Iraq          | 0.640               | 7.4                      |                              |

*Source:* Calculated using data from USDA FAS n.d.

the world's top importer of pork and chicken, and it was the second-biggest importer of beef, behind the United States. In addition to Japan and the United States, the other top beef-importing countries were China, Russia, and South Korea. The top pork-importing countries behind Japan were China, Mexico, South Korea, and the United States. And, the top chicken-importing countries behind Japan were Saudi Arabia, South Korea, the EU, and Iraq. We can therefore see two important patterns in global meat imports. First, East Asia—Japan, South Korea, and China—is the region that imports the most meat, particularly beef and pork, though Japan is also the leading importer of chicken. Second, emerging “middle class” and industrial countries—China, Mexico, Russia, and South Korea—are among the leading importing countries. These countries have been rising in the world economy during the past five decades, and their national diets have shifted to include more meat as they have risen. Annual per capita meat consumption has increased dramatically in each of these countries from 1961 to 2013: from 3.5 kg to 57.6 kg in China, 22.5 kg to 60.7 kg in Mexico, 33.5 kg to 70.1 kg in Russia, and 3.9 kg to 63.3 kg in South Korea.<sup>4</sup> Japan saw a similar increase in its annual per capita meat consumption, from 5.1 kg in 1961 to 49.1 kg in 2013. These sharply increasing levels of meat consumption rested on the expansion of meat imports through the global meat industry.

These two tables reveal a couple of important points about the shape of the current meat trade. First, there is a geographical dimension, in which much meat is exported from North and South America and imported by Asia. There are, of course, other exporters and importers. India is a leading exporter of beef, and its main markets are regional (e.g., Thailand and Vietnam among others). Nevertheless, about a quarter of the world's beef exports, more than half of its pork exports, and almost two-thirds of its chicken exports come from North and South America, especially the United States and Brazil. Second, the global meat trade is uneven in terms of the power of exporting states versus importing states. Many exporting states are nations in the global north—Australia, Canada, the EU, New Zealand, and the United States—which means that they have disproportionate power in the interstate system relative to meat-importing countries that tend to be middle-income countries (e.g., Mexico and South Korea) or, especially, the global south (e.g., Iraq). Of particular importance, countries in the global north tend to have more influence over the terms of trade, such as the