Meat and meat products

World meat production is forecast to expand in 2025, albeit at a slower pace than in recent years, increasing by 0.6 percent year on year to reach 380 million tonnes (carcass weight equivalent). This growth will be primarily driven by an expected expansion in poultry meat output, while production of pig and ovine meats will likely register only marginal increases. By contrast, bovine meat output is forecast to decline, partially offsetting overall growth.

Poultry meat production is projected to expand steadily and be supported by sustained consumer demand due to its relative affordability, particularly amid limited household purchasing power. Despite ongoing outbreaks of high pathogenicity avian influenza (HPAI) in several key producing regions and persistent limitations in breeding stock availability, favourable operational margins are expected to sustain output growth. Global pig meat output is forecast to rise slightly, reflecting modest herd expansions. In China – the world's largest producer, accounting for nearly half of global output – low producer margins are expected to continue to constrain growth, resulting in largely stable production levels. Similarly, ovine meat output is forecast to increase marginally, as flock reductions in Oceania are offset by gains in other regions. By contrast, global bovine meat production is anticipated to contract in 2025. Slaughter rates are expected to be constrained by reduced cattle inventories due to herd contractions and ongoing retention for rebuilding, particularly in Brazil and the United States of America, following elevated slaughter levels in recent years.

Global meat trade is forecast to grow by 1.3 percent in 2025 to reach 43 million tonnes, a significant slowdown compared to the estimated 4.7 percent growth in 2024. The anticipated modest growth is supported by expectations of tightening supplies and firm import demand. However, growth will likely be impacted by geopolitical tensions, the implementation of trade-restrictive measures, and the continued spread of animal diseases, which could further disrupt trade flows. The projected trade expansion will be principally driven by larger shipments of poultry meat, supported by its affordability relative to other meats. Bovine meat trade is also forecast to rise, underpinned by stronger import demand, particularly from the United States, amid domestic supply constraints. Meanwhile, global trade in pig and ovine meats is forecast to remain stable, reflecting broadly balanced market conditions.

International meat prices, as tracked by the FAO Meat Price Index (FMPI), continued to rise during the first five months of 2025. This upward trend reflects reduced export availabilities in several major producing countries, coupled with sustained global demand. Increased market uncertainty, driven by widespread animal disease outbreaks and ongoing trade policy tensions, has supported price increases. Additionally, anticipatory stockpiling by some importing countries – prompted by concerns over potential trade disruptions – has added further upward pressure on international meat prices.

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Figure 1.7 FAO international meat price index (2014–2016 = 100)

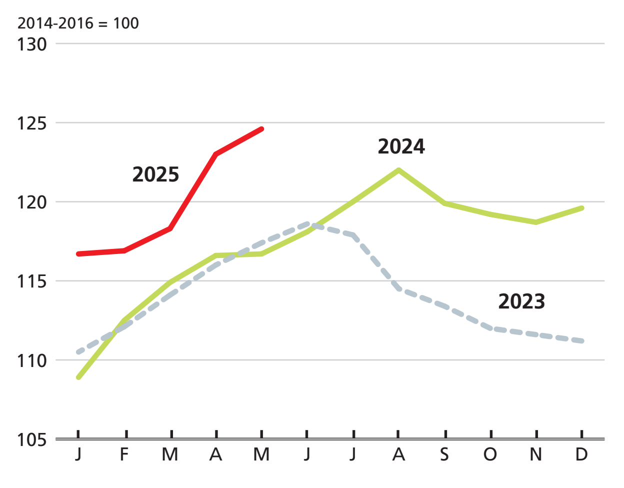

Table 1.7 World meat market at a glance

	2023	2024 *estim.*	2025 *f'cast*	Change: 2025 over 2024
	million tonnes (carcass weight equivalent)			*%*
WORLD BALANCE				
Production	**372.4**	**378.2**	**380.5**	**0.6**
Bovine meat	76.5	78.5	78.0	-0.6
Poultry meat	146.3	149.8	152.4	1.7
Pig meat	124.7	125.1	125.2	0.1
Ovine meat	19.0	19.0	19.1	0.6
Trade	**40.6**	**42.5**	**43.0**	**1.3**
Bovine meat	11.9	13.1	13.2	1.4
Poultry meat	16.2	16.6	16.9	1.9
Pig meat	9.8	10.1	10.2	0.5
Ovine meat	1.2	1.3	1.3	0.0
SUPPLY AND DEMAND INDICATORS				
Per caput food consumption:				
World (kg/year)	45.8	46.2	46.1	-0.2
Trade - share of prod. (%)	*10.9*	*11.2*	*11.3*	*0.7*

FAO MEAT PRICE INDEX (2014-2016=100)	2023	2024	2025 *Jan-May*	Change: Jan/May 2025 over Jan/May 2024
	114	117	119.9	5.2