

# ANNEX A

## Table A.21. Main policy assumptions for meat markets

|                                   |           | Average<br>2013-15est | 2016    | 2017    | 2018    | 2019    | 2020    | 2021    | 2022    | 2023    | 2024    | 2025    |
|-----------------------------------|-----------|-----------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| <b>ARGENTINA</b>                  |           |                       |         |         |         |         |         |         |         |         |         |         |
| Beef export tax                   | %         | 15.0                  | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     |
| <b>CANADA</b>                     |           |                       |         |         |         |         |         |         |         |         |         |         |
| Beef tariff-quota                 | kt pw     | 76.4                  | 76.4    | 76.4    | 76.4    | 76.4    | 76.4    | 76.4    | 76.4    | 76.4    | 76.4    | 76.4    |
| In-quota tariff                   | %         | 0.0                   | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     |
| Out-of-quota tariff               | %         | 26.5                  | 26.5    | 26.5    | 26.5    | 26.5    | 26.5    | 26.5    | 26.5    | 26.5    | 26.5    | 26.5    |
| Poultry meat tariff-quota         | kt pw     | 45.4                  | 45.4    | 45.4    | 45.4    | 45.4    | 45.4    | 45.4    | 45.4    | 45.4    | 45.4    | 45.4    |
| In-quota tariff                   | %         | 2.5                   | 2.5     | 2.5     | 2.5     | 2.5     | 2.5     | 2.5     | 2.5     | 2.5     | 2.5     | 2.5     |
| Out-of-quota tariff               | %         | 196.6                 | 196.6   | 196.6   | 196.6   | 196.6   | 196.6   | 196.6   | 196.6   | 196.6   | 196.6   | 196.6   |
| <b>EUROPEAN UNION<sup>1</sup></b> |           |                       |         |         |         |         |         |         |         |         |         |         |
| Voluntary coupled support         |           |                       |         |         |         |         |         |         |         |         |         |         |
| Beef and veal <sup>2</sup>        | mln EUR   | 1 676                 | 1 702   | 1 698   | 1 698   | 1 697   | 1 698   | 1 698   | 1 698   | 1 698   | 1 698   | 1 698   |
| Sheep and goat meat <sup>3</sup>  | mln EUR   | 159                   | 481     | 484     | 487     | 491     | 496     | 496     | 496     | 496     | 496     | 496     |
| Beef basic price <sup>4</sup>     | EUR/kg dw | 2.2                   | 2.2     | 2.2     | 2.2     | 2.2     | 2.2     | 2.2     | 2.2     | 2.2     | 2.2     | 2.2     |
| Beef buy-in price <sup>4,5</sup>  | EUR/kg dw | 1.8                   | 1.9     | 1.9     | 1.9     | 1.9     | 1.9     | 1.9     | 1.9     | 1.9     | 1.9     | 1.9     |
| Beef tariff-quota                 | kt cwe    | 317.8                 | 329.2   | 330.8   | 332.3   | 333.9   | 335.5   | 337.1   | 338.6   | 340.2   | 341.8   | 343.0   |
| Pig tariff-quota                  | kt cwe    | 145.5                 | 163.3   | 164.2   | 165.1   | 166.0   | 166.9   | 167.8   | 168.7   | 169.6   | 170.5   | 170.5   |
| Poultry tariff-quota              | kt rtc    | 986.6                 | 1 008.3 | 1 011.5 | 1 014.7 | 1 017.9 | 1 021.1 | 1 024.3 | 1 026.3 | 1 028.4 | 1 030.5 | 1 032.5 |
| Sheep meat tariff-quota           | kt cwe    | 292.9                 | 294.7   | 295.1   | 295.6   | 296.1   | 296.3   | 296.5   | 296.7   | 296.9   | 297.1   | 297.1   |
| <b>JAPAN<sup>6</sup></b>          |           |                       |         |         |         |         |         |         |         |         |         |         |
| Beef stabilisation prices         |           |                       |         |         |         |         |         |         |         |         |         |         |
| Upper price                       | JPY/kg dw | 1 106.7               | 1 125.0 | 1 125.0 | 1 125.0 | 1 125.0 | 1 125.0 | 1 125.0 | 1 125.0 | 1 125.0 | 1 125.0 | 1 125.0 |
| Lower price                       | JPY/kg dw | 851.7                 | 865.0   | 865.0   | 865.0   | 865.0   | 865.0   | 865.0   | 865.0   | 865.0   | 865.0   | 865.0   |
| Beef tariff                       | %         | 38.5                  | 38.5    | 38.5    | 38.5    | 38.5    | 38.5    | 38.5    | 38.5    | 38.5    | 38.5    | 38.5    |
| Pigmeat stabilisation prices      |           |                       |         |         |         |         |         |         |         |         |         |         |
| Upper price                       | JPY/kg dw | 570.0                 | 590.0   | 590.0   | 590.0   | 590.0   | 590.0   | 590.0   | 590.0   | 590.0   | 590.0   | 590.0   |
| Lower price                       | JPY/kg dw | 423.3                 | 440.0   | 440.0   | 440.0   | 440.0   | 440.0   | 440.0   | 440.0   | 440.0   | 440.0   | 440.0   |
| Pig meat import system            |           |                       |         |         |         |         |         |         |         |         |         |         |
| Tariff                            | %         | 4.3                   | 4.3     | 4.3     | 4.3     | 4.3     | 4.3     | 4.3     | 4.3     | 4.3     | 4.3     | 4.3     |
| Standard import price             | JPY/kg dw | 409.9                 | 409.9   | 409.9   | 409.9   | 409.9   | 409.9   | 409.9   | 409.9   | 409.9   | 409.9   | 409.9   |
| Poultry meat tariff               | %         | 7.4                   | 7.4     | 7.4     | 7.4     | 7.4     | 7.4     | 7.4     | 7.4     | 7.4     | 7.4     | 7.4     |
| <b>KOREA</b>                      |           |                       |         |         |         |         |         |         |         |         |         |         |
| Beef tariff                       | %         | 40.0                  | 40.0    | 40.0    | 40.0    | 40.0    | 40.0    | 40.0    | 40.0    | 40.0    | 40.0    | 40.0    |
| Beef mark-up                      | %         | 0.0                   | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     |
| Pigmeat tariff                    | %         | 23.8                  | 23.8    | 23.8    | 23.8    | 23.8    | 23.8    | 23.8    | 23.8    | 23.8    | 23.8    | 23.8    |
| Poultry meat tariff               | %         | 21.0                  | 21.0    | 21.0    | 21.0    | 21.0    | 21.0    | 21.0    | 21.0    | 21.0    | 21.0    | 21.0    |
| <b>MEXICO</b>                     |           |                       |         |         |         |         |         |         |         |         |         |         |
| Pigmeat tariff                    | %         | 0.0                   | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     |
| Pigmeat NAFTA tariff              | %         | 0.0                   | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     |
| Poultry meat tariff-quota         | kt pw     | 200.0                 | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     |
| In-quota tariff                   | %         | 0.0                   | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     |
| Out-of-quota tariff               | %         | 150.0                 | 100.0   | 75.0    | 75.0    | 75.0    | 75.0    | 75.0    | 75.0    | 75.0    | 75.0    | 75.0    |
| <b>Russia</b>                     |           |                       |         |         |         |         |         |         |         |         |         |         |
| Beef tariff-quota                 | kt pw     | 570.0                 | 570.0   | 570.0   | 570.0   | 570.0   | 570.0   | 570.0   | 570.0   | 570.0   | 570.0   | 570.0   |
| In-quota tariff                   | %         | 15.0                  | 15.0    | 15.0    | 15.0    | 15.0    | 15.0    | 15.0    | 15.0    | 15.0    | 15.0    | 15.0    |
| Out-of-quota tariff               | %         | 50.0                  | 50.0    | 55.0    | 55.0    | 55.0    | 55.0    | 55.0    | 55.0    | 55.0    | 55.0    | 55.0    |
| Pigmeat tariff-quota              | kt pw     | 430.0                 | 430.0   | 430.0   | 430.0   | 430.0   | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     |
| In-quota tariff                   | %         | 5.0                   | 0.0     | 0.0     | 0.0     | 0.0     | 25.0    | 25.0    | 25.0    | 25.0    | 25.0    | 25.0    |
| Out-of-quota tariff               | %         | 68.3                  | 65.0    | 65.0    | 65.0    | 65.0    | 25.0    | 25.0    | 25.0    | 25.0    | 25.0    | 25.0    |
| Poultry tariff-quota              | kt pw     | 364.0                 | 364.0   | 354.0   | 354.0   | 354.0   | 354.0   | 354.0   | 354.0   | 354.0   | 354.0   | 354.0   |
| In-quota tariff                   | %         | 25.0                  | 25.0    | 25.0    | 25.0    | 25.0    | 25.0    | 25.0    | 25.0    | 25.0    | 25.0    | 25.0    |
| Out-of-quota tariff               | %         | 80.0                  | 80.0    | 80.0    | 80.0    | 80.0    | 80.0    | 80.0    | 80.0    | 80.0    | 80.0    | 80.0    |
| <b>UNITED STATES</b>              |           |                       |         |         |         |         |         |         |         |         |         |         |
| Beef tariff-quota                 | kt pw     | 696.6                 | 696.6   | 696.6   | 696.6   | 696.6   | 696.6   | 696.6   | 696.6   | 696.6   | 696.6   | 696.6   |
| In-quota tariff                   | %         | 4.8                   | 4.8     | 4.8     | 4.8     | 4.8     | 4.8     | 4.8     | 4.8     | 4.8     | 4.8     | 4.8     |
| Out-of-quota tariff               | %         | 26.4                  | 26.4    | 26.4    | 26.4    | 26.4    | 26.4    | 26.4    | 26.4    | 26.4    | 26.4    | 26.4    |

Table A.21. Main policy assumptions for meat markets (cont.)

|                         |       | Average<br>2013-15est | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2022  | 2023  | 2024  | 2025  |
|-------------------------|-------|-----------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| <b>CHINA</b>            |       |                       |       |       |       |       |       |       |       |       |       |       |
| Beef tariff             | %     | 15.5                  | 15.5  | 15.5  | 15.5  | 15.5  | 15.5  | 15.5  | 15.5  | 15.5  | 15.5  | 15.5  |
| Pigmeat tariff          | %     | 16.0                  | 16.0  | 16.0  | 16.0  | 16.0  | 16.0  | 16.0  | 16.0  | 16.0  | 16.0  | 16.0  |
| Sheep meat tariff       | %     | 15.0                  | 15.0  | 15.0  | 15.0  | 15.0  | 15.0  | 15.0  | 15.0  | 15.0  | 15.0  | 15.0  |
| Poultry meat tariff     | %     | 19.1                  | 19.1  | 19.1  | 19.1  | 19.1  | 19.1  | 19.1  | 19.1  | 19.1  | 19.1  | 19.1  |
| <b>INDIA</b>            |       |                       |       |       |       |       |       |       |       |       |       |       |
| Beef tariff             | %     | 100.0                 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Pigmeat tariff          | %     | 100.0                 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| Sheep meat tariff       | %     | 91.9                  | 91.9  | 91.9  | 91.9  | 91.9  | 91.9  | 91.9  | 91.9  | 91.9  | 91.9  | 91.9  |
| Poultry meat tariff     | %     | 87.0                  | 87.0  | 87.0  | 87.0  | 87.0  | 87.0  | 87.0  | 87.0  | 87.0  | 87.0  | 87.0  |
| Eggs tariff             | %     | 150.0                 | 150.0 | 150.0 | 150.0 | 150.0 | 150.0 | 150.0 | 150.0 | 150.0 | 150.0 | 150.0 |
| <b>SOUTH AFRICA</b>     |       |                       |       |       |       |       |       |       |       |       |       |       |
| Sheep meat tariff-quota | kt pw | 6.0                   | 6.0   | 6.0   | 6.0   | 6.0   | 6.0   | 6.0   | 6.0   | 6.0   | 6.0   | 6.0   |
| In-quota tariff         | %     | 20.0                  | 20.0  | 20.0  | 20.0  | 20.0  | 20.0  | 20.0  | 20.0  | 20.0  | 20.0  | 20.0  |
| Out-of-quota tariff     | %     | 96.0                  | 96.0  | 96.0  | 96.0  | 96.0  | 96.0  | 96.0  | 96.0  | 96.0  | 96.0  | 96.0  |

Note: Average 2013-15est: Data for 2015 are estimated.

1. Till 2014, EU farmers can be granted the Single payment scheme (SPS) or the Single area payment scheme (SAPS), which provides flat-rate payments independent from current production decisions and market developments. From 2015, it becomes the Basic payment scheme (BPS) and it shall account for 68% maximum of the national direct payment envelopes. On top of this, from 2015 onwards, new compulsory policy instruments are introduced: the Green Payment (30%) and young farmer scheme (2%).
2. Implemented in 24 Member States.
3. Implemented in 22 Member States.
4. Price for R3 grade male cattle.
5. Safety-net trigger.
6. Year beginning 1 April.

Source: OECD/FAO (2016), "OECD-FAO Agricultural Outlook", OECD Agriculture statistics (database). doi: dx.doi.org/10.1787/agr-outl-data-en