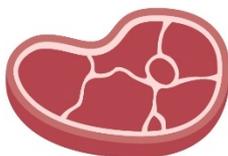


Global trends in meat consumption

Tim Whitnall and Nathan Pitts



Meat consumption

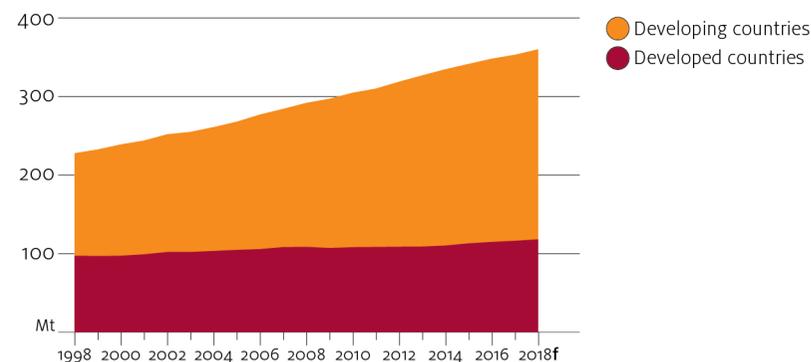
Analysis of global meat consumption trends.

Global meat consumption increased by 58% over the 20 years to 2018 to reach 360 million tonnes. Population growth accounted for 54% of this increase and per person consumption growth accounted for the remainder. Per person consumption was influenced most strongly by changing consumer preferences and income growth. This article compares trends in meat consumption in Australia and some of its major meat export markets—China, Indonesia, Japan and the United States.

In the 20 years to 2018 developing countries accounted for around 85% of the rise in global meat consumption (Figure 1). Between 1998 and 2018, Chinese consumption increased by 72%. This increase accounted for 34% of global consumption growth. Population growth has been the principal driver behind increased Chinese consumption of all meats. Indonesia accounts for only 3% of global meat consumption. However, the combination of population growth and strong economic growth between 1998 and 2008 resulted in Indonesian meat consumption more than doubling. Strong Chinese demand growth and land constraints on [meat production in Indonesia](#) increased global import demand for meat. These 2 countries are now major importers of meat.

In Australia and the United States, meat consumption increased over the 20 years to 2018 because of higher poultry consumption. This demand is met principally by domestic production. In contrast, total meat consumption in Japan fell over the period. Japanese expenditure on meat has fallen because the ageing population has weakened overall demand.

Figure 1 Meat consumption, developing and developed countries, 1998 to 2018f



f OECD forecast.

Note: OECD definitions of developing and developed countries.

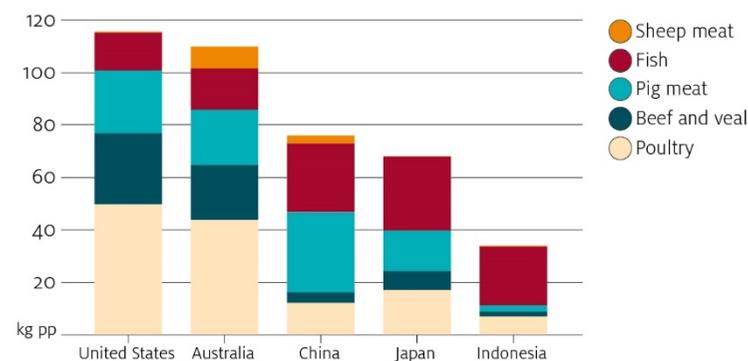
Source: OECD

Per person consumption

When compared with its major export partners, Australia's meat consumption closely matches the United States (Figure 2). In both countries poultry is the most consumed meat at over 40 kg per person. Beef and veal and pig meat each account for between 20 and 30 kg per person. Fish accounts for around 15 kg per person and sheep meat for less than 10 kg per person.

In contrast, in Australia's major Asian markets, fish accounts for a much larger share of consumption. In Japan and Indonesia, fish is the dominant source of protein by a large margin. In China, pig meat is the most consumed meat, followed by fish. Beef, veal and sheep meat form a relatively small share of consumption in all Asian markets.

Figure 2 Per person consumption of meat, selected countries, 2018f



f OECD forecast.

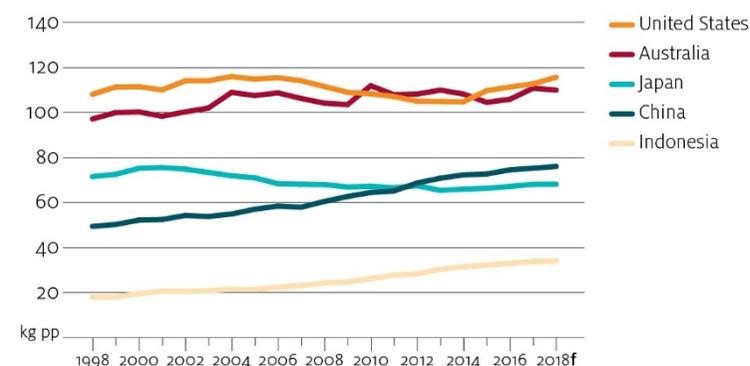
Notes: Per person consumption data are expressed on an edible weight basis, estimated using OECD conversion factors of 0.7 for beef and veal; 0.78 for pig meat; 0.88 for poultry and sheep meat; and 0.6 for fish. Poultry includes chicken, duck, goose, guinea fowl, turkey and prepared liver.

Source: OECD

Rising incomes increase meat consumption

Over the 20 years to 2018 per person meat consumption has grown strongly in Indonesia (by 89%) and China (54%). Growth has been much slower in Australia (13%) and the United States (8%). In contrast, meat consumption fell by 3% in Japan.

Figure 3 Per person consumption of meat, 1998 to 2018f



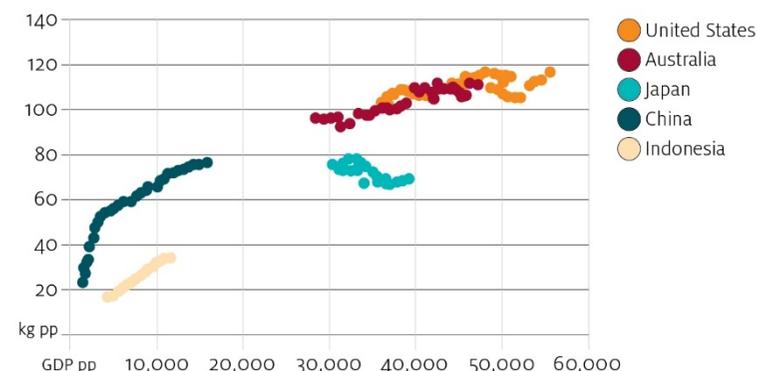
f OECD forecast.

Source: OECD

Rising incomes are a major driver of increased meat consumption. Between 1990 and 2018 higher real GDP per person coincided with higher rates of meat consumption. However, the impact that rising income has on meat consumption slows considerably as countries develop (Figure 4). Per person consumption in China and Indonesia increased markedly with small increases in income over the period. In contrast, Australian and US meat consumption was much less sensitive to income growth.

Japan is an exception to the correlation between consumption and income. Per person meat consumption in Japan has fallen considerably since 1990 despite rising incomes. This reflects an ageing population that is reducing overall expenditure on food. Lower fish consumption accounts for most of the decline, reflecting changing consumer preferences towards a more western diet. Other than fish, Japanese consumption of meat has risen at a rate similar to other developed countries.

Figure 4 Meat consumption and GDP per person, selected countries, 1990 to 2018f



f OECD forecast.
Sources: OECD; International Monetary Fund

White meat increasing per person consumption growth

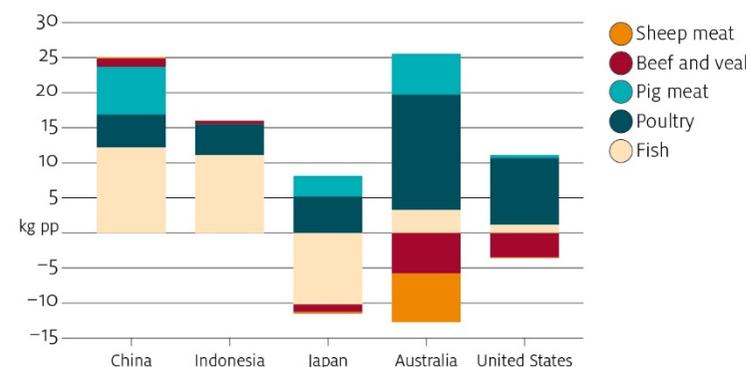
Consumer preferences globally have shifted towards higher consumption of fish and poultry, which now account for a much larger share of meat consumption.

In China and Indonesia, a rapid rise in fish consumption has been driven by strong growth in domestic fish production compared with other meats. Fish remains the dominant source of protein in Indonesia, accounting for around two-thirds of meat consumption—largely unchanged from 1998. In China, pig meat remains the most consumed meat, but its share of the total has fallen from 48% in 1998 to 40% in 2018. Fish now accounts for 34% of meat consumed in China (up from 28% in 1998).

In developed countries, growth in total meat consumption has been slower because it has been comparatively high for a long time. In

Australia and the United States, higher consumption of poultry has more than offset reduced consumption of beef, veal and sheep meat (Figure 5). This trend has been primarily driven by the increasing affordability of poultry over red meat.

Figure 5 Changes in meat consumption, selected countries, 1998 to 2018f



f OECD forecast.
Source: OECD

Meat consumption projected to increase

Between 2019 and 2024 meat consumption is expected to rise. This is largely driven by population growth and rising incomes in developing countries. [Ongoing economic growth](#) in Indonesia is expected to increase meat consumption. Population and income growth will drive higher consumption in China. However per person consumption growth will slow as consumption approaches that of developed countries. Consumption growth in Australia and the United States is expected to be minimal, and moderate increases in poultry meat will be mostly offset by declines in beef, veal and sheep meat.

Globally, white meat is expected to continue displacing red meat in consumer diets. However, this ongoing adjustment is assumed to be lower than over the decade to 2018.