



Australian Government
**Australian Centre for
International Agricultural Research**



**THE UNIVERSITY
OF QUEENSLAND**
AUSTRALIA

Cattle Movements & Beef Trade in SEA and China



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The Mekong Region



Objectives

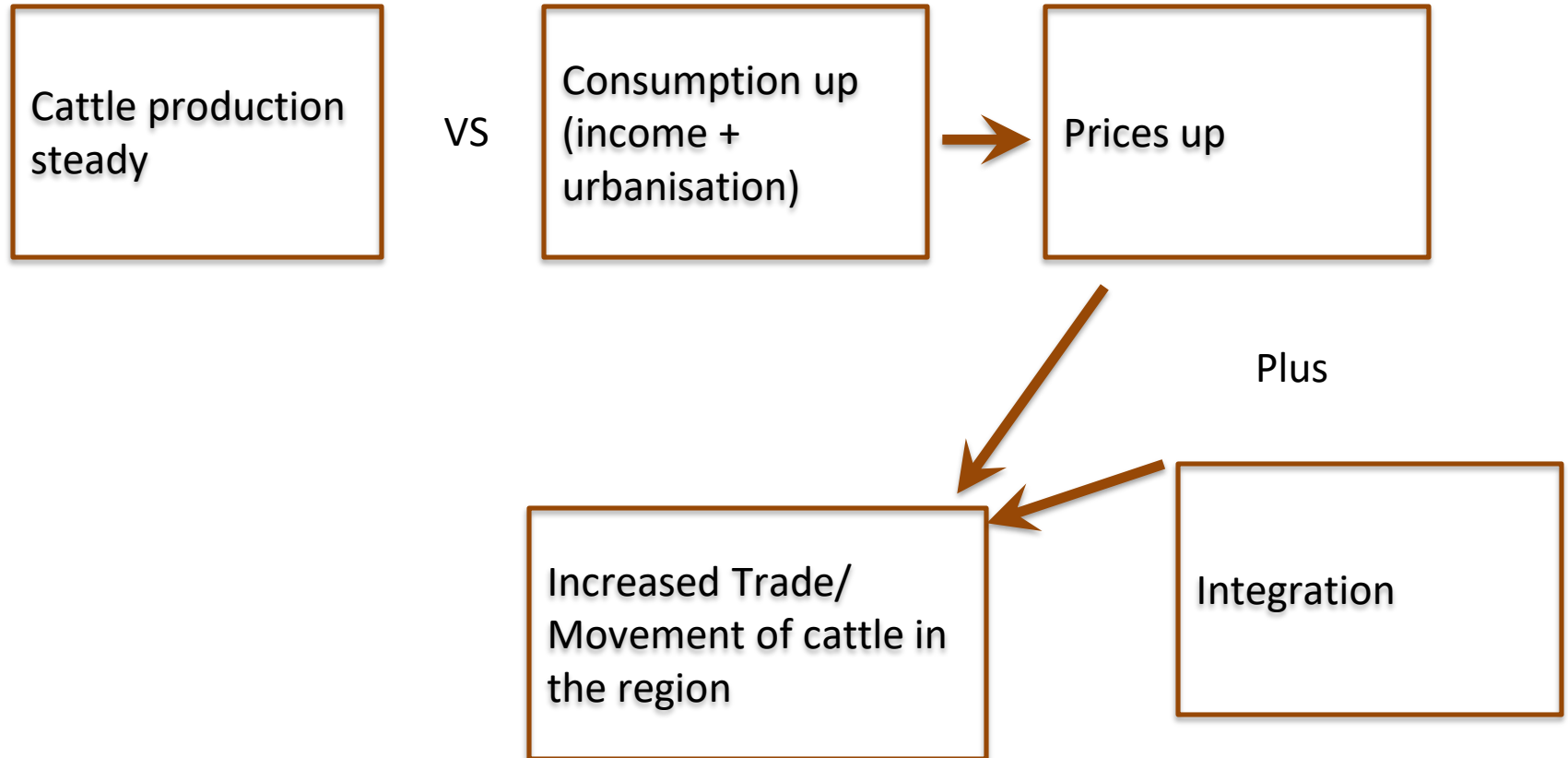
Develop an understanding of regional dynamics relating to government policy, agribusiness investment opportunities and livelihoods of smallholders through:

- ✓ Review and collate data cattle and beef industries in the region
- ✓ Investigate selected trans-boundary cattle and beef trade flows
- ✓ Develop Spatial Price Equilibrium model of the cattle and beef industries in the region

Approach

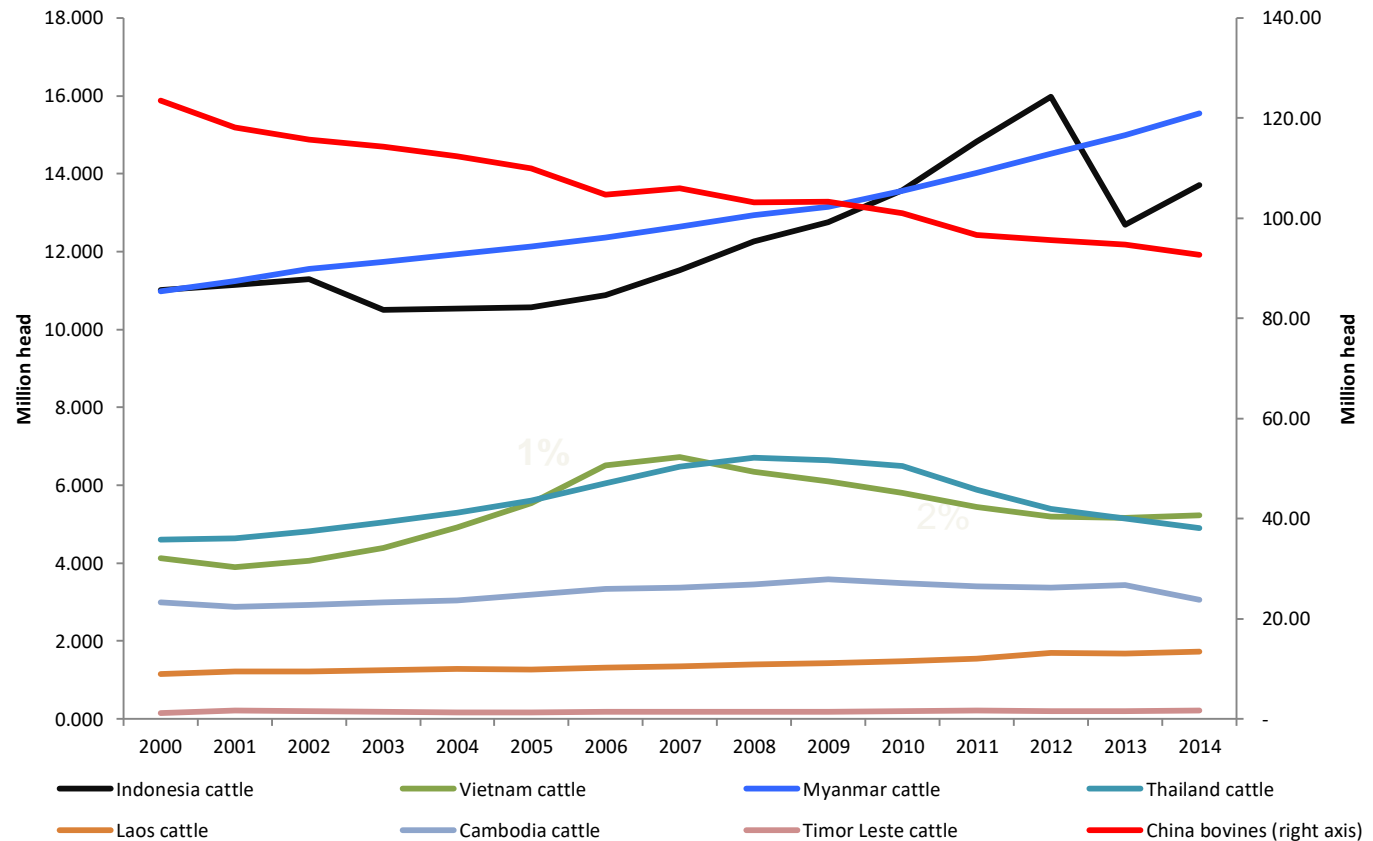
- Main concentration:
 - Vietnam (experiencing rapid increases in demand and commercialisation of the sector) and
 - Myanmar (a key live cattle supply area, currently transitioning away from a draft orientation to cattle production orientation in the Central Dry Zone)
- Detailed analyses of domestic beef industries using primary data and official and unofficial data including a critical examination of statistical issues;
- Analysis of both formal and informal trade flows, networks and barriers to trade in the region; and
- Spatial Price Equilibrium model of the cattle and beef industries in the region

Broad drivers in cattle trade/movement in SEA & China



Cattle numbers

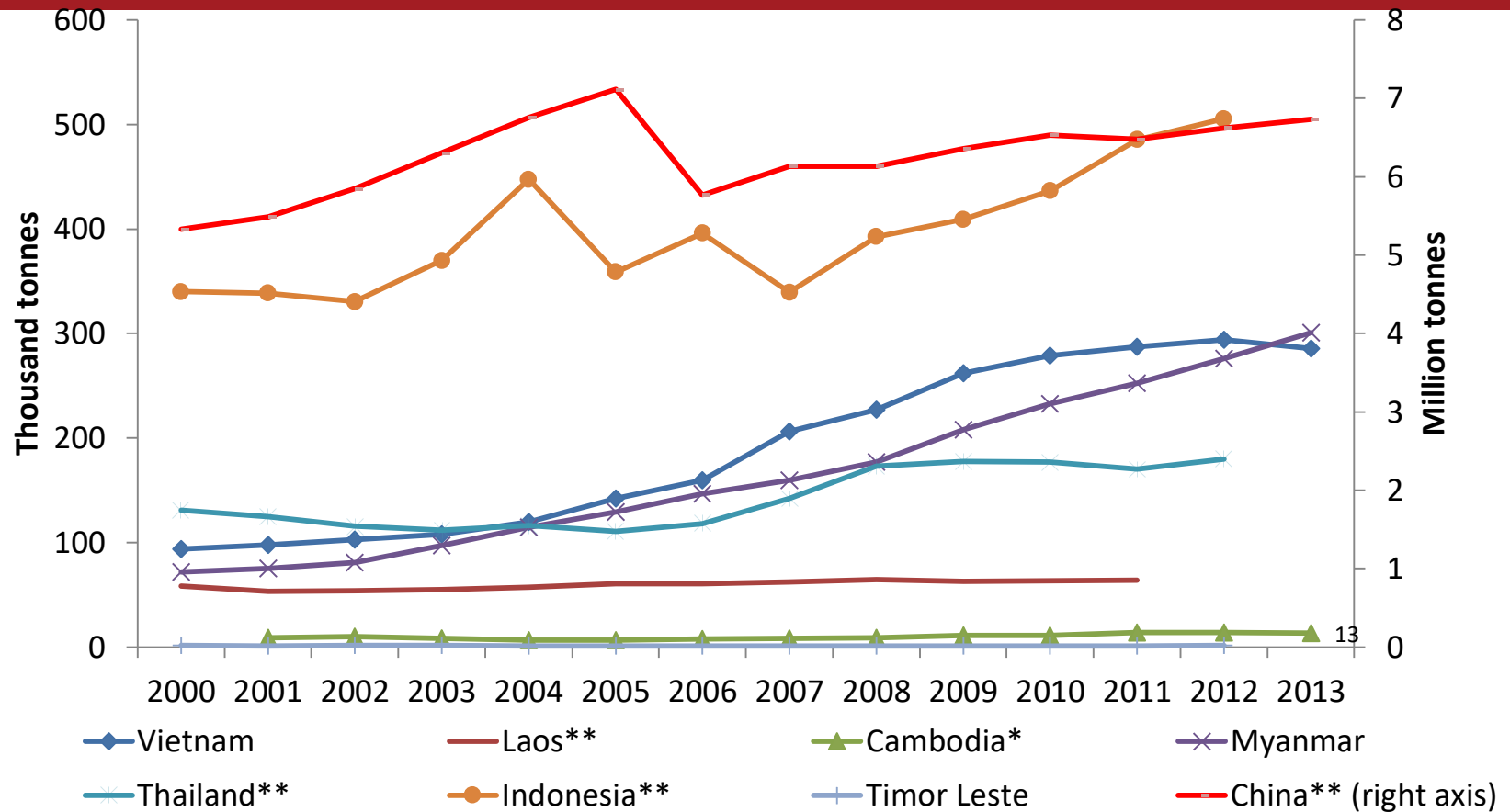
Cattle numbers (million head)



Comments:

- Cattle number gradually decreased for China, Thailand & Vietnam since 2008

Cattle meat production

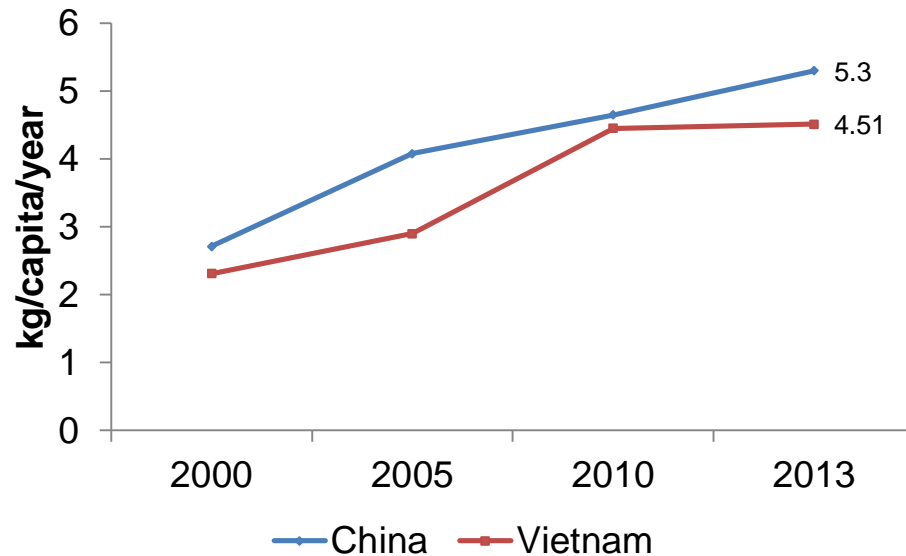


Sources: Country sources

Comments:

- Generally, beef production steadily increased (while cattle numbers stagnated)
- This suggests an indication of productivity, including slaughter rates & carcass weights

Beef consumption

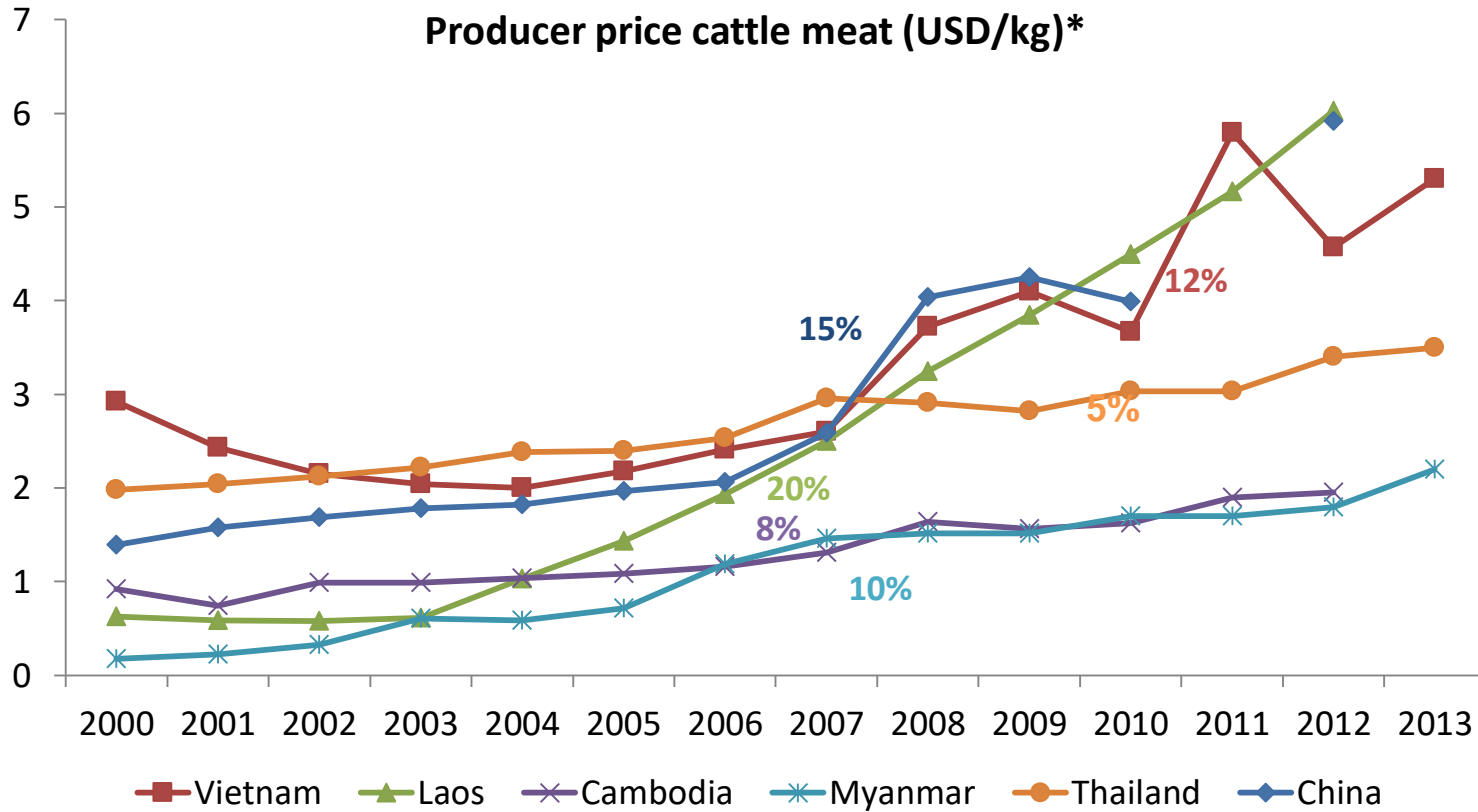


Sources: Country statistics

Comments:

- Doubling of beef consumption in China and Vietnam between 2000 & 2013 (not taking into account unofficial beef imports)
- Consumption growth rate is higher than production data, particularly for China and Vietnam

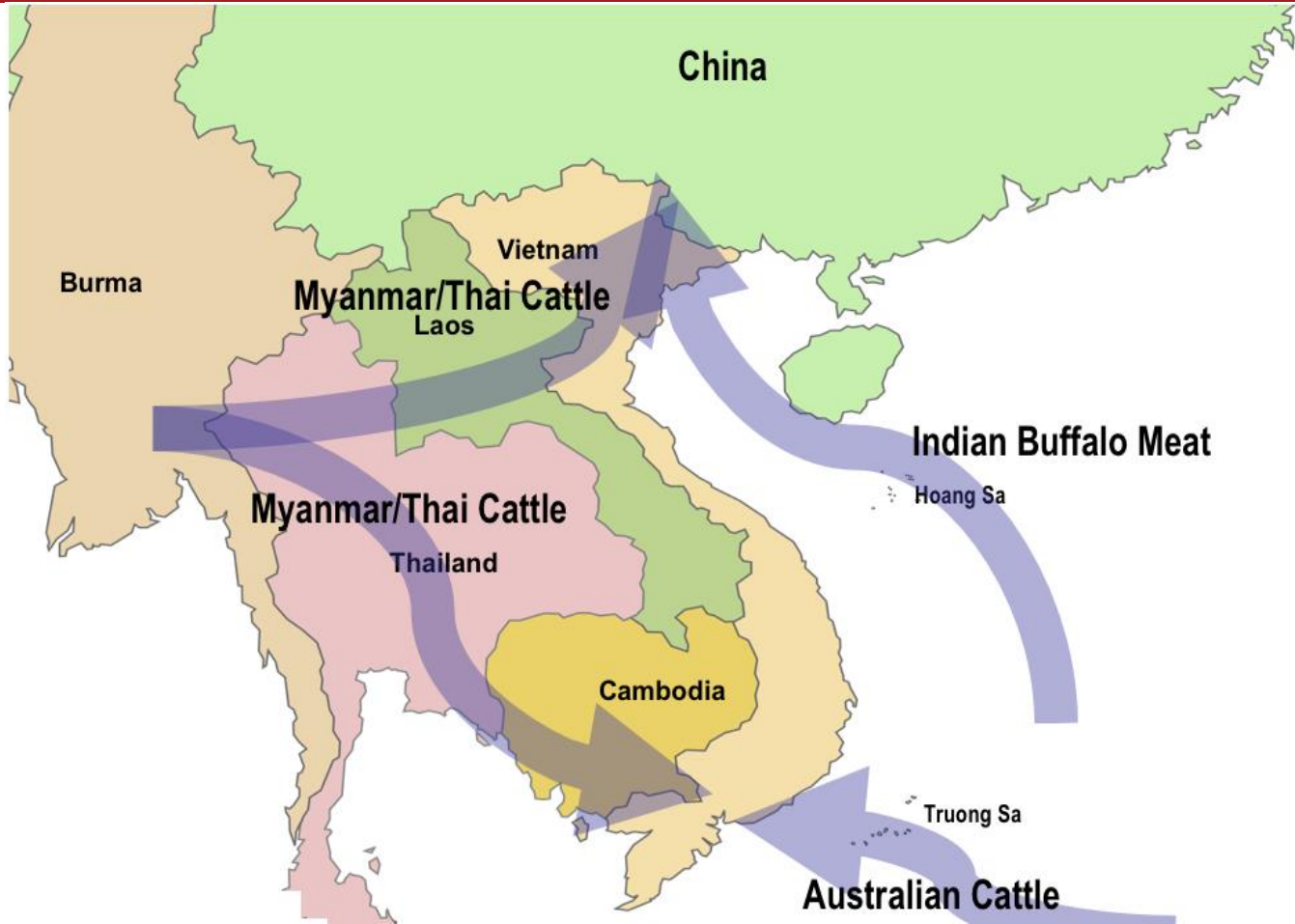
Prices



Comment:

- Prices are show rapid increases

Four main value chains



“Northern” Value Chain



250,000 cattle/ year

- 225,000 to China
- 25,000 to Vietnam







“Southern” Value Chain



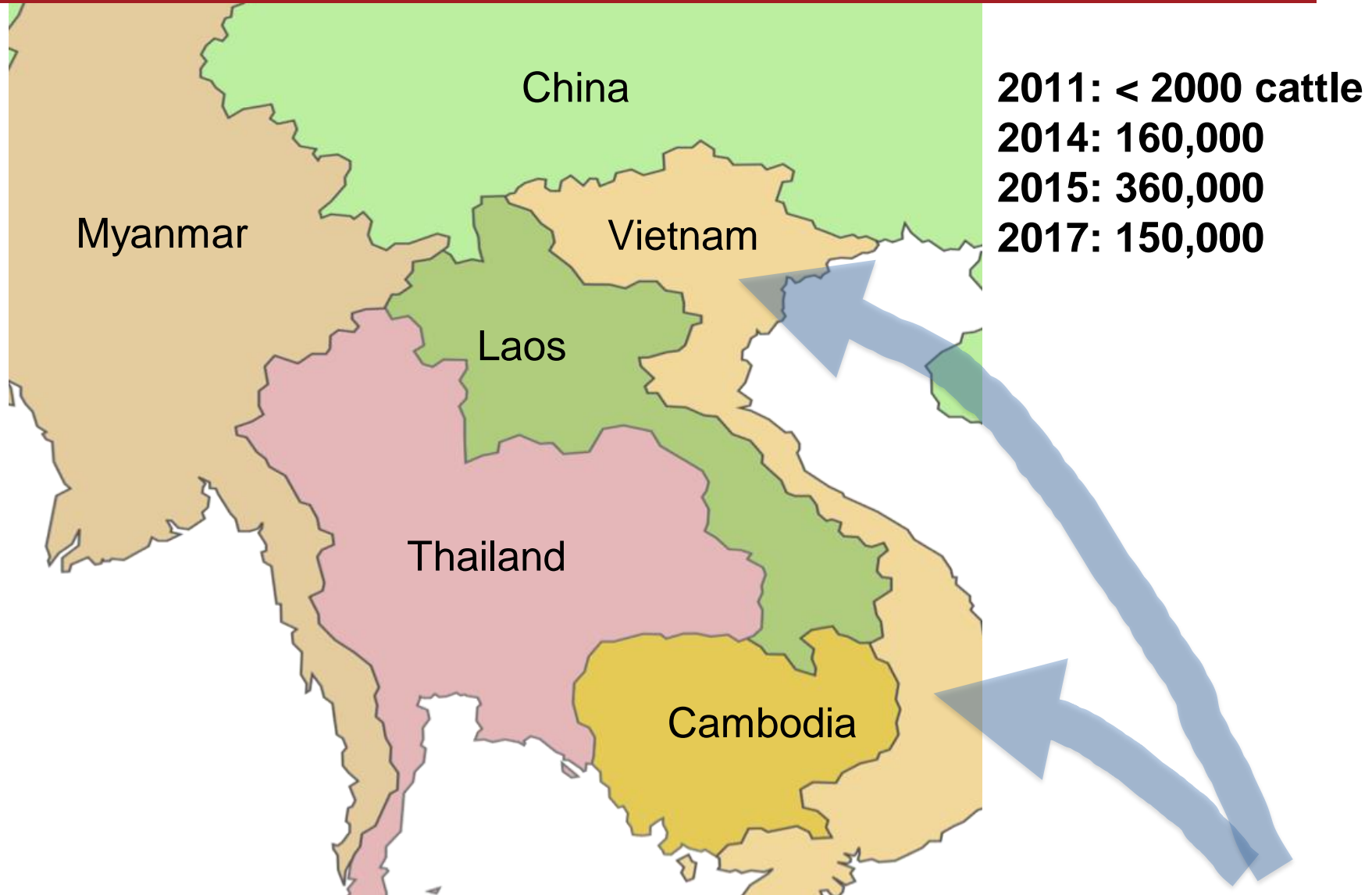
150,000 cattle/ year







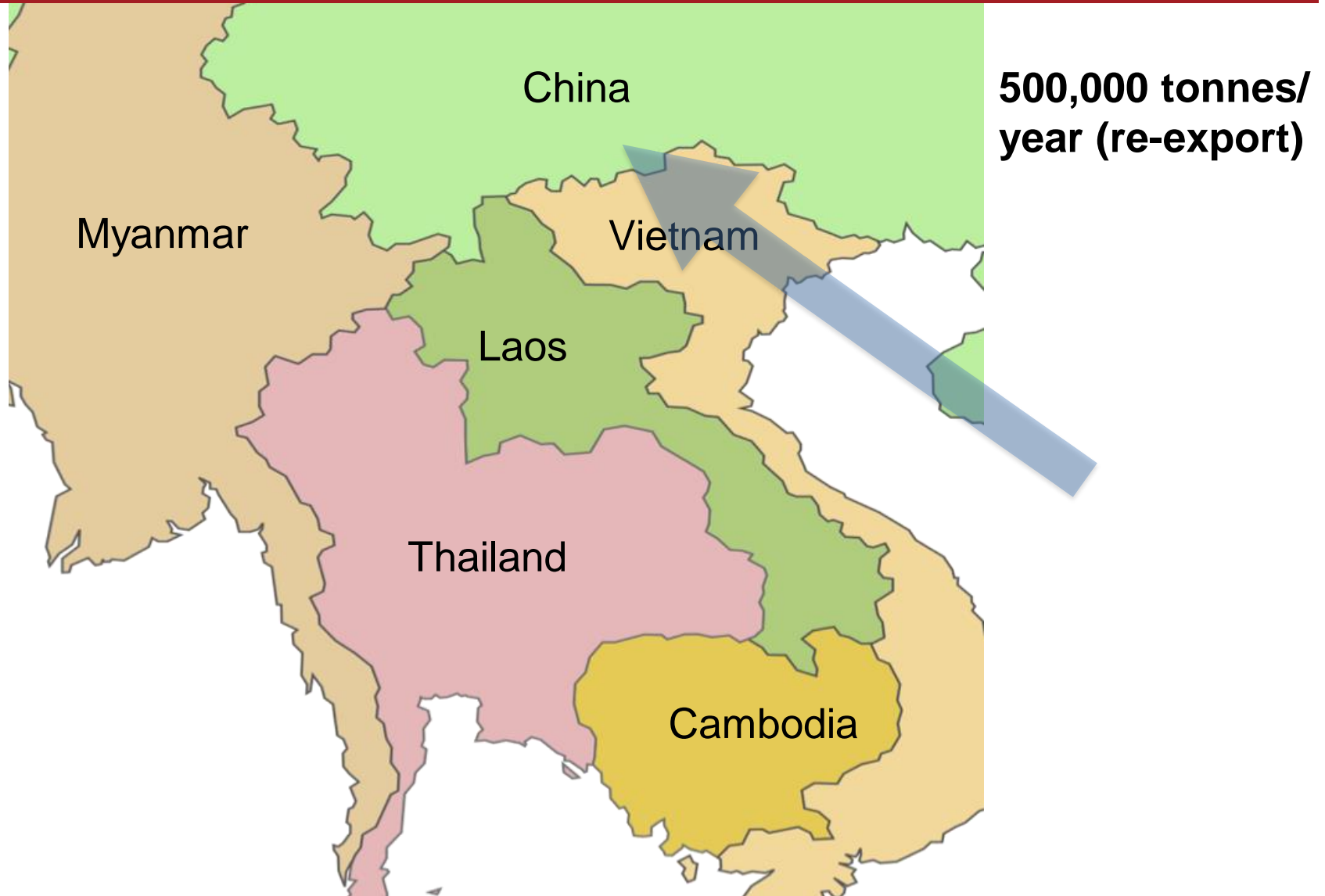
“Australian” Value Chain







“Indian” Buffalo Value Chain



Implications

- Highly Interlinked Region
- Large movements of cattle and beef/buffalo meat over long distances
- Cross-border price differentials and border restrictions → informal trade between Myanmar /Thailand, and Myanmar and China
- The economy opening & changes in slaughter and live export policy → Myanmar significant player in the Mekong region
- Implications for policy, industry & smallholders

Information dissemination mechanisms

<http://www.asiabeefnetwork.com>

[Asia Beef Network Facebook group](#)

Asia Beef Network

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A network to share data and information among academic researchers, development practitioners to create a sustainable value chain for cattle raisers and the beef market in the region.

READ MORE

Thank you

