

**GENERAL AGREEMENT  
ON TARIFFS AND TRADE**

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**MEAT CONSUMPTION TRENDS**

At the twenty-seventh meeting of the Meat Market Analysis Group, held on 15-16 June 1994, participants agreed to reply to a questionnaire regarding meat consumption trends on a voluntary basis (IMC/W/97). The documents containing the replies to this questionnaire are circulated on a country-by-country basis under the document series IMC/W/-.

**POLAND**

**Question 1**

**Is meat the major source of animal proteins in your country? How does it compare with other animal protein sources such as fish? Have there been any changes in the relation of the consumption of meat and other animal proteins? Why?**

Meat is the major source of animal proteins in Poland. Table 1 shows the relations and trends of annual consumption of the various animal proteins sources.

**TABLE 1**

**Annual per capita consumption of animal products**

(kgs.)

<b>Production</b>	<b>1980</b>	<b>1985</b>	<b>1989</b>	<b>1990</b>	<b>1991</b>	<b>1992</b>	<b>1993x</b>
Meat & offal	74.0	60.2	68.6	68.6	73.2	70.3	67.6
Fish & processed fish	8.1	7.8	6.1	5.4	6.2	6.4	6.4
Butter	8.9	8.5	8.8	7.8	6.3	5.2	4.9
Milk/litres	262	273	60	241	231	217	208
Eggs/pieces	223	220	194	190	175	173	157

x - estimates

**Question 2**

**Which type of meat has traditionally the consumers' preference in your country? Why?**

The consumers in Poland prefer pigmeat (54 per cent to 64 per cent of total meat consumption). There are two main reasons for this: tradition and natural conditions such as large production of potatoes and grains.

**Question 3**

**Do meat consumption trends in your country correspond to the general trend described above (see IMC/W/97), i.e. a shift away from red meat consumption to white meat, in particular poultry meat? Please provide evidence.**

There is no evidence for that. Table 2 shows trends in meat consumption in Poland.

TABLE 2

**Annual per capita meat consumption in Poland**

(kgs.)

Product	1980	1985	1989	1990	1991	1992	1993
Total meat & offal	74.1	60.2	68.6	68.6	73.2	70.3	67.6
Meat	69.1	55.8	64.1	63.6	68.3	65.9	63.5
Beef & Veal	18.5	16.2	16.3	16.4	15.6	12.6	10.7
Pigmeat	37.2	30.0	37.7	37.6	42.0	42.2	40.1
Poultry meat	11.2	7.1	8.4	7.6	8.2	9.1	8.7

**Question 4**

**Which factors among those cited above (see IMC/W/97) (and/or others) affected beef and veal consumption the most in your country? Please elaborate. For example, the following factors and their changes are frequently identified as significantly affecting beef and veal consumption: beef prices; disposable household income; relative prices of other meats; population growth; age structure of the population; health considerations (including those related with production methods); product image; animal welfare concerns. What is the role of those factors? What other factors are relevant?**

In Poland the beef consumption is declining, despite its lower price compared to that of pigmeat. The profitability of milk production is the major reason behind the development of cattle herds. The

decline of milk production and reorganisation of state and collective sector had a negative impact on beef production and consumption.

#### **Question 5**

**Is there any relationship between beef trade and domestic beef consumption in your country? Please elaborate.**

In 1991-1993, reflecting more advantageous terms, exports of beef and cattle was four to seven times higher than pigmeat and represented about 9 per cent to 14 per cent of total domestic production. During the same period consumption declined. The demand for beef in the Polish market was met by domestic production and partially by imports. The share of imported beef was 12 per cent to 15 per cent of total consumption.

#### **Question 6**

**Are there any policies or other measures in force directed at affecting beef consumption and/or retail beef prices in your country? In the affirmative, please describe the type of measures and the rationale behind them.**

There are no policies or other measures in force directed at affecting beef consumption and/or retail beef prices in Poland. However, there is policy affecting milk production to offset seasonal changes in milk supply and to reverse the decline of cattle herds. This policy includes minimum price for milk producers.

#### **Question 7**

**Are there other types of measures designed to stimulating meat consumption (promotion campaigns in fairs, audiovisual promotion, particular marketing techniques)? For all types of meat or for a particular type of meat? Please specify.**

The promotion of meat and meat products is the responsibility of producers and retailers. The Ministry of Agriculture and Food Economy is participating in global promotion of Polish agricultural products; for example during the Polagra Agricultural Fair.

#### **Question 8**

**Retail trade practices are changing fast in a rising number of countries. Butcheries are being affected by competition from supermarkets and hypermarkets. Is this the case in your country? How is it affecting meat consumption in general, and beef and veal in particular? Is meat quality being affected?**

The retail practices are also changing in Poland. The share of private sector is now up to 50 per cent of the total market. Producers are interested in the creation of their own distribution network in order to cut retail prices. The quality as well as the range of products offered for sale are improving. All these factors have a positive impact on the meat market and might help to rebuild beef consumption.

**Question 9**

**Is the catering market an area of expansion in your domestic market? How does it affect the consumption of the different types of meat?**

The catering market is expanding in Poland. This has a positive impact on meat consumption especially on beef consumption, but there is no official data to support this assessment.

**Question 10**

**Could you forward to the Secretariat any study/document, official or non-official, which your authorities believe might be helpful for a better assessment and understanding of meat consumption trends in your country?**

No further information provided.