

**GENERAL AGREEMENT  
ON TARIFFS AND TRADE**

**RESTRICTED**  
**IMC/W/109**  
9 December 1994  
Special Distribution

(94-2718)

**Arrangement Regarding Bovine Meat**

**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 under the document series IMC/W/-.

**URUGUAY**

**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?**

The following table shows the situation of meat consumption in Uruguay over different periods:

**COMPARATIVE TABLE OF PER CAPITA CONSUMPTION OF MEAT**

This table has been drawn up in order to facilitate analysis over different periods so as to distinguish the relevant trends.

	BOVINE MEAT	SHEEP MEAT	PIG MEAT	POULTRY	FISH	TOTAL
1979-1993 Kilos per capita	67.4	13.7	7.5	6.3	6.3	101.2
Percentage	64.8	15.3	6.9	6.7	6.3	100.0
1984-1993 Kilos per capita	63.7	15.0	6.8	6.6	6.2	98.3
Percentage	64.8	15.3	6.9	6.7	6.3	100.0
1989-1993 Kilos per capita	63.9	16.2	7.0	8.2	6.2	101.5
Percentage	63.0	16.0	6.9	8.1	6.1	100.0

As can be seen, the percentage share of so-called red meat is much higher than that of other meat, despite the high increase in per capita consumption of poultry over the last five years. The average for the last five years shows a decrease of 5 per cent in per capita consumption of bovine meat in relation to the average over the last 15 years.

**Question 2**

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

As the preceding table shows, bovine meat is still the type of meat preferred by the Uruguayan consumer. This is mainly for historical reasons and since the introduction of beef cattle into Uruguay their relative abundance has forged cultural links with their consumption. Traditionally, beef is the meat which is most appreciated and whose culinary characteristics are best known at the cultural level.

**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.**

The extent of this trend can also be seen in the table in reply to question 1.

**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?**

The most important factors affecting consumption of bovine meat are mainly the trends in average real earnings and the quantity of the production available. Among other factors which affect the physical volume of consumption of bovine meat is the possible demand for post-harvest exports on the part of Brazil.

**Question 5**

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

Domestic consumption affords little flexibility since the amounts exported vary according to the production cycles.

**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 currently no such measures.

**Question 7**

Are there other types of measures designed to stimulate 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.

At present, the marketing of sheep meat is protected under a regime for the exemption of value-added tax (VAT) at the minimum rate.

**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?

This does occur; supermarkets and hypermarkets are increasingly competing in the sale of packaged cuts which are generally of higher added value than those on sale in traditional butcheries.

**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?

This is an expanding market and it leads to higher demand in the high tourist season when, in some years, there are increases in the price of higher quality cuts.