Note by secretariat
Redraft of concluding Section (E & F)
Statistics
Note on developments in trade
Estimated volume of exports from non members countries
Points for discussion (E & F)
Draft summary record - discussion 1-5 July 1963
Elements for consideration in negotiations
List of products
Draft report
Idem - alternative text by UK and New Zealand
Redraft of Draft report
List of products
Data on trade flows and trade measures
Questions for examination (F only)
Note on agricultural policies in selected countries
Statistics
Programme of work
Draft working document
Proposals for a general arrangement (1966) (SECRET) --
Proposals for a general arrangement (final) (SECRET) INT(66)576
Proposals for a general arrangement (suppl.) (SECRET) INT(66)577
Draft - elements to be considered for inclusion in general arrangement (E & F) (SECRET) --
Note by Director-General (E & F) (SECRET) INT(66)627

L/1772
Spec(62)134
Spec(63)193
Spec(63)200
Spec(63)207
Spec(63)208/Rev.1
Spec(63)224
Spec(63)308
Spec(64)84
Spec(64)87
Spec(64)87/Add.1
Spec(64)89
Spec(64)84
Spec(64)131/Rev.1
Spec(65)121
Spec(65)123
Spec(65)128
INT(66)471/Rev.1
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INT(66)576
INT(66)577
SECRET
INT(66)627
The Council at its meeting from 22 to 25 February 1962 agreed to establish a Group on an Inter-Cabinet basis, composed of Argentina, Australia, B.S.S., New Zealand, United Kingdom, United States and Uruguay.

The terms of reference of the Group are those set down by the Ministers in their recommendations in respect of trade in agricultural products: "to establish the basis for the negotiation of practical measures for the creation of acceptable conditions of access to world markets." The Council agreed that in the first instance the problems to be studied by the Group would relate to trade in meat of cattle and sheep. It was, however, understood that during the course of the work of the Group it might be found desirable to vary somewhat the scope of the study, for example by examining also the market situation in some related products, in which many other countries principally interested in the trade in these products might be asked to join the Group.

The Council agreed that the Secretary-General should prepare for distribution a circular paper on international trade in cattle and sheep meat, including appropriate references to the findings of Committee II. It was also agreed that governments should be asked to study the paper and submit to the Executive Secretary any suggestions for increasing any short or long term problems affecting the marketing of such meat.
II. Consumption and Supplies of Beef and Veal in the Main Importing European Countries

Domestic production provides the major part of total beef and veal supplies in most countries. More than 50 per cent of total beef production enters into world trade, and the United States accounts for a considerable share of world imports. The trade is mainly directed towards Western European countries. Of these countries, the United Kingdom is by far the most important importer, but Germany and Italy also play significant roles in the export of Argentina, Uruguay, Australia, and New Zealand, the principal sources of information.

Fresh meat represents an important item in commercial trade for food products in high-income countries. The demand for meat is more responsive to increases in income than for most other commodities. In particular, for countries like Italy, where the level of consumption is still relatively low, and Germany, the expenditure on meat tends to increase as fast as total private expenditure.

However, the effects upon the consumption levels of increased income may be offset by an adverse movement in retail prices. The retailing off in per capita consumption of beef and veal, which took place in 1958 and 1959 in several European countries which have been linked with the large increases in beef prices experienced by these countries. Similarly, the relative price of beef and veal compared with those of mutton and lamb or pork, and more recently with poultry, have had a significant influence on the development of beef and veal consumption during the last decade.

Situations in the United Kingdom

In the United Kingdom, the total consumption of meat increased by about 12 per cent between 1954 and 1957, the best year of which meat was rationed, and 1957. During this period, the consumption of mutton, veal, and lamb remained practically unchanged, whereas the consumption of beef and veal rose by more than 20 per cent.

Contrary to what happened immediately after the end of food rationing, the total consumption of meat declined slightly in 1957, and 1958 and recovered in 1959 to a level exceeding by only 3 per cent that of 1957. Developments during this period illustrate the influence of prices on consumption. Especially in 1957, the fall in prices was accompanied by a significant decline in consumption, whereas the substantial rise in retail prices (more than 20 per cent) for beef and veal was accompanied by a decline by about 15 per cent in consumption. By contrast, for mutton and lamb, stable prices were accompanied by a rise of about 30 per cent in demand, and for poultry a substantial decline in prices was compensated by a large increase in consumption.

The information given in this paragraph is taken from the calculations made regularly by the National Food Survey Committee.
In 1954, in spite of a significant decline in wholesale prices, the published data indicated that the retail prices of beef and veal did not change much, nor did the quantities consumed.

Production of beef (see Table 1) fell by 6 per cent between 1954 and 1955, but thereafter showed no substantial variation until 1958, except for 1957 when production fell sharply owing to a number of factors of which the most significant was a heavy fall in imports of cattle for fattening from the Irish Republic. The latter was a consequence of the health regulations imposed on imports of cattle following the completion of the tuberculosis eradication campaign in the United Kingdom. There was, however, a heavy fall in imports from the traditional exporting countries free of 1958 onwards, as a result of the emergence of the United States as a market for beef and to the fact that the exportable surplus of chilled beef in the Argentine was available. The lower quantities available for consumption as a result of these movements led to the increase in wholesale and retail prices referred to earlier.

In 1958 home production increased substantially (by 10 per cent) due partly to increased shipments of live cattle for fattening from the Irish Republic. Wholesale prices fell substantially, due partly to the increased level of supplies of both retail and cattle, which were available. The low level of prices was in part due to the factors which led to a further reduction in imports from the traditional suppliers.

In 1957 the proportion of total meat consumed represented by chilled beef increased considerably as a result of the higher home production and the higher prices of chilled beef from the Irish Republic. As a result, wholesale prices of chilled beef fell by about 15 per cent compared with the levels of chilled and frozen beef in the United Kingdom. The share of chilled and frozen beef in the chilled and frozen market mentioned in the previous paragraph of this report, continued to decline in the United States, as the chilled chilled and frozen beef exports to the United States market.

Situation in Germany and Italy

Prices due to the rapid rise in incomes and to a high income elasticity of demand, the consumption of beef and veal (see Table 1) increased rapidly in both countries in the last decade, especially in Italy where consumption of chilled and frozen meat has increased to above levels of the pre-war period. In Italy, where consumption was by 45 per cent, gross national product by 3 per cent, and by 1 per cent. In Germany, where the per-capita increase in income was substantially higher, the increase in per-capita consumption had for several years been rising at a rate of about 4 per cent per annum. This increase was experienced in the Italian market, where the average per-capita consumption in 1955 was about 203 lb. The increase of 4 per cent was experienced in the Italian market, where the average per-capita consumption in 1955 was about 203 lb. The increase of 4 per cent was experienced

German imports of beef and veal, from large numbers to east European countries, depending on quotas allowed in connexion with the development of domestic production. Imports of live cattle, mainly from Denmark, have increased considerably over the past few years and this trend, which has been subject to only minor variations, has now resulted in substantial proportions. In 1956, for example, Denmark imported 470,000 head of cattle. In Italy imports were steady during the first half of the year, resulting in a level of about 70,000 tons in 1956 (210,000 tons including 30,000 tons of meat from slaughters of imported cattle), which represents some 20 per cent of total supplies. In 1953, imports declined sharply in Italy to the level of about 50,000 tons (11,000 tons including 9,000 tons from slaughters of imported cattle). Italian production which had remained stable in 1950 and 1951 was by about one-third in 1953, as a result of the rehabilitation of the cultivation methods of agricultural establishments which had to be re-orientated towards an increase in the production of food crops and therefore in the direction of an increased consumption of chilled beef.

111. Situation in the Main European Exporting Countries

After a substantial increase which reached a peak in 1956 and 1958 the production in the four main countries exporting countries - Argentina, Australia, New Zealand and Italy - declined sharply, especially in Argentina and Australia in which the 1956 levels were respectively 35 per cent and 20 per cent lower than in 1954. This movement seems to be mainly the result of cyclical variations during the period 1954-57. This led to a reduction in exports and simultaneously to a decrease in domestic consumption following rising consumer prices.

Traditional markets for the exports of the four main exporting countries were affected not only by the reduction in supply, but also by the increased demand. Since 1959 the United States and the major exporters. While the United States was a net exporter of about 200,000 tons in 1956, net imports reached an average level of nearly 210,000 tons in the period 1959-60. The demand for imports existing in the United States was not mainly by shipments of chilled beef for manufacturing purposes from New Zealand and Australia (see Table 6). This trend from 1956 onwards led to a diversion of the United States market to the United Kingdom and to the demand of chilled beef for manufacturing purposes from New Zealand and Australia. The price of chilled beef has been of no less than 50 per cent in the United States as well as in the United Kingdom, during the period 1959-60 (see Table 5).

Argentina and Uruguay, which have relatively small amounts of chilled beef exported by these countries increased by 20 per cent between 1956 and 1960, but significantly less than prices of veal which exported from Argentina (see Table 5).
From information available it seems that increases in production have occurred recently in Argentina and New Zealand, and exports in 1961 have been, at least by 10 per cent (see Table 3). In Argentina, within the last few years the slaughter weight has increased by nearly 15 per cent during 1958, and there was an increase in the number of exports to other countries by 25 per cent during 1959. These increases were further reduced by nearly 15 per cent. Argentine exports declined from the high level achieved in 1960.

It may be noted that during the period of short supplies which started around 1957, New Zealand was able to enter the main export markets and to take a significant share of those markets (see Table 6). Overseas countries, such as South Africa and Rhodesia, were able to start supplying the United Kingdom markets in 1958, and their exports numbered 22,000 tons in 1959 and 15,600 thousand tons in 1961. Similarly, European countries from Switzerland and particularly France, with the aid of export subsidies, expanded considerably their exports to the United Kingdom, Germany and Italy.

Some of the exporting countries' special mention of French sales is unnecessary, as are the cases for the main exporting countries. French production has been subject to cyclical fluctuations (see Table 3). After a peak reached in 1955, when exports amounted to 30,000 tons - French production declined to a level about 10 per cent lower in 1956, and the exports were replaced by private imports of nearly 30,000 tons. Since 1955, production has again been rising and the 1955 level was exceeded in 1957, between 1960 and 1961 a further increase by one ton to 12,000 tons was noted. But, on the import side, France imported 25,000 tons of crude meat in 1959 and 9,000 tons in 1961 (see Table 3).

The graph below the table shows the trend, in addition to these data, France's imports in 1958 and 1961. These figures, as well as production, are based on the imports of the United Kingdom, which are estimated at 20 per cent to 25 per cent of the amount of France's imports. Similarly, New Zealand's imports of meat during these years can be as low as 20 per cent of its exports. This is a general trend for all exporting countries. Austria's imports of meat during these years can be as low as 20 per cent of its exports. This is a general trend for all exporting countries.

The following table shows the trend, in addition to these data, France's imports in 1958 and 1961. These figures, as well as production, are based on the imports of the United Kingdom, which are estimated at 20 per cent to 25 per cent of the amount of France's imports. Similarly, New Zealand's imports of meat during these years can be as low as 20 per cent of its exports. This is a general trend for all exporting countries. Austria's imports of meat during these years can be as low as 20 per cent of its exports. This is a general trend for all exporting countries.

V. Principal Barriers to Trade

Many of the developments in the production of meat and to some extent changes in trading patterns, which have been described in the foregoing paragraphs, can be related to government policy measures designed either to protect the domestic producer from external competition, to stabilise or support producers' incomes, or to stimulate domestic production. All these policy measures generally involve the maintenance of direct or indirect barriers to trade in meat, but in addition, their effect on production and consumption can have far-reaching consequences for the trade of exporting countries.

The United States, with its large domestic market, is the most important country in the world in terms of meat consumption. The Government of the United States has been particularly active in stimulating the production of meats. The United States is the largest producer of meats in the world, and its production is dominated by the large meatpacking industry. The Government's policy has been to encourage the growth of the industry and to promote the export of meats.
Imports of poultry meat are not subject to the import agency.

Italy

Until 1969 the import licence required the only production and no special support measures were reduced for meat. In March 1969 the Italian Government changed the import regime with a view to promoting domestic poultry-raising. Minimum guaranteed prices applicable to imports of certain types of beef and lamb and live cattle. Imports are suspended when the average domestic price of certain types of beef and lamb on a number of representative markets is lower than 20,000 lire per 100 kg, or when the average price of certain types of live cattle on a number of representative markets is lower than 30,000 lire per 100 kg. In September 1969, the Board was asked for imports of beef and live cattle. According to recent information, the Italian Government has decided to abandon the system of minimum prices and to apply a quota system on imports of beef.

A quota of 1,000,000 tons has been opened, but it is not clear whether it is intended that this quota should be the only quota to be opened before the end of the year.

France

In France, target prices are established together with floor and ceiling prices. When the floor price is reached, market interventions are adopted by the Government agency - which purchase and store meat. The price paid for beef has been increased considerably since 1957 on account of the increase in the average weight of livestock produced. The target ceiling price for first-quality beef was increased from 85,000 lire per kg, to 105,650 lire per kg, in 1966 to 120,650 lire per kg, in 1966 to 120,650 lire per kg. When the internal market in recent years and the internal price ceiling has been increased up to 120,650 lire per kg. When the permits of Government hold stocks were converted at the price lower than the domestic target price. Imports of beef which had been liberalised in January 1959 have since August 1960 again been subject to import restrictions. Imports from the EEC countries are subject to minimum price arrangements.

Belgium

In Belgium, target prices are established on the basis of ceiling and floor prices are established. The ceiling price for live cattle is fixed quarterly and averaged in 1960, 1961, 1962, 1963 per kg. on the hoof. The floor price for live cattle is fixed at 50 per kg. on the hoof. For sheep the target price in 1960 amounted to 8,340 lire per kg. on the sheep, the cattle, and live cattle were respectively 6,000 lire and 5,000 lire per kg. on the hoof. Imports, including aid and price declines, however, the Belgian Government issues import licences to cover the excess quantities at government expense.

The United States, which is the second largest importer of meat, as well as a major supplier of pork, it is not necessary to apply a price support system for meat, nor to apply quantitative restrictions. Tariff rates on beef and veal, but not imported meats, are bound in GATT.

The relevant domestic duties applicable to the United States are set out in Table 11.

United Kingdom

In the Federal Republic of Germany, there are no direct price guarantees. However, the domestic market is established freely, and in order to maintain a balanced and fair import market, importers and exporters are subjected to quantitative regulations with the annual import programme. When domestic prices are not fixed, the Storage Agency intervenes.
In Britain there are no guaranteed prices for meat, but certain price limit have been established. As long as the domestic price remains within these limits, imports are in principle free and the import levy, an immunities of which are mentioned in Table II, is unimportant. If the price is below the lower limit, the import levy is increased or quantitative restrictions are applied. If the upper limit is exceeded the import levy may be reduced or other appropriate measures may be taken.

The price limits fixed are the following:

<table>
<thead>
<tr>
<th>Product</th>
<th>Lower Limit</th>
<th>Upper Limit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beef</td>
<td>306 - 308</td>
<td>360 - 362</td>
</tr>
<tr>
<td>Veal</td>
<td>354 - 364</td>
<td>414 - 424</td>
</tr>
<tr>
<td>Slaughter</td>
<td>453 - 513</td>
<td></td>
</tr>
</tbody>
</table>

In addition, indicative prices are fixed for the various categories of meat for slaughter. For example, the average indicative price [liveweight] for the first quality beef and veal at 350 kg and 370 kg, respectively, is 362p per kg. Imports of meat are also subject to certain limitations. Export licenses are issued in the current monetary year on the basis of the weekly price limit. The price fall below the lower limit, imports are limited, under certain conditions to a reasonable amount in the disposal of the meat.

In conformity with the decision made by the Council of the EEC in Brussels on 9 June under agricultural policy, on 14 January 1962, the Council decided to submit a request to the Council in the near future about the future of the Council's decision of 9 June 1962, and in its proposal has yet been made a request of a proposal made by the Council's Council of 9 June 1962.

VI. General Principles of Export Taxation

All import duties are levied only on the import of goods. No discrimination is made between imports of goods for consumption and goods for export. However, the import duties are levied on the goods entering the country whether the same goods are destined for consumption or for export.

In the countries with only one tariff, no or limited import duties are levied. In certain countries, a complete absence of import duties is levied. In the countries with a complex tariff, the same duties are levied on goods for consumption or for export.

The various systems are designed to stabilize or support producers' incomes, vary from country to country and are generally a complex matter. These systems either directly support the income of producers or indirectly assist them by preventing foreign price, either benefiting at a certain guaranteed price level or some unspecified target price.

Some countries apply over and above, in place of customs duties, variable import levies such as the stabilization and rectification of prices at a desired level. These are the variable import levy in Britain, the stabilization levy in Sweden, and the licensing fees in Ireland.

Qualitative import restrictions are, however, the most widely used device for the direct impact of price. In many of the countries which have established a complex tariff, the goods of the same type or kind, subject to quantitative restrictions, are subject to variable levies. In some countries, these are levied by a system of quotas, or by a system of non-tariff barriers. The system of quotas and non-tariff barriers is, in some cases, applied to a limited number of goods, and in other cases, applied to a large number of goods.

The system of quotas and non-tariff barriers, as well as the system of variable levies, is applied to the export of goods. In some countries, quantitative restrictions are applied to the export of goods, and in other countries, they are applied to the import of goods. In some countries, the export of goods is prohibited, and in other countries, it is permitted only under certain conditions.

It was found that roughly one-third of the countries which established a complex tariff, do not apply variable import levies, and that one-third of the countries which applied variable import levies, apply only variable import levies. It was also found that roughly one-third of the countries which applied variable import levies, do not apply quantitative restrictions, and that one-third of the countries which applied quantitative restrictions, do not apply variable import levies.
Government subsidy schemes need not be supplemented by restrictions on imports. For instance, the deliberate purchase policy of the United Kingdom is not supplemented by import restrictions. Some of the economic policies of such a system, however, tend to double in prices, which have given substantial rise in meeting the higher prices of wheat and wheat meal and manufactured goods.

It should finally be noted that the government support policies are applied in many instances in such a way as to produce a reduced production of other commodities in the production of which the wheat is used.

VII. Quotas and Tariffs

In reviewing the development of the world wheat and meat situation since the early 1930's, it seems apparent that cyclical fluctuations in production have played an important role in the development of the world wheat and meat situation. It would require, however, a much more detailed analysis to establish to what extent cyclical movements have been influenced by government support policies, especially in relation to the recent upward movement of production in Western Europe.

With this reservation noted, it may be useful to consider the cyclical movements in three different areas, namely Western Europe, the United States, and the major wheat exporting areas (see Table VI). In Western Europe, the cyclical movements, out of phase with each other, in combination created in a total production which remained practically constant during the period 1934 to 1936, but started to increase rapidly in 1937-1940. Any such cycle might be expected to produce a trend in the future. The United States, in 1934 and again in 1937, produced respectively 1940 and 1942, resulting in the production of 1942. Finally, the production of the West and its cyclical movements in 1934 and 1940 are shown to recover only in 1941.

In this respect, the great movements in Europe were in the opposite direction. With the United Kingdom, and with the major wheat exporting countries in the Southern Hemisphere.

In the Southern Hemisphere, the production of wheat and, particularly, of wheat hulled, increased considerably between 1937 and 1939. It seems probable that the high 1937 and 1938 wheat years were largely due to the high prices which were experienced during the transfer of government purchases to the production of livestock and in many countries, especially in the United States, to the high government purchases of livestock. In other words, it would appear that government purchases have deliberately been used to increase livestock production in view of unfavourable prices in the market. It is difficult to foresee what the duration and extent of the present upward movement will be since this depends on some

price levels. The making of the reaction is obviously of great importance to the making of the policy since the economic policy may be expected to influence the making of the policy of production in the United Kingdom and to continue to expand on the basis of this policy.

Due to the general rise in retail prices which occurred during the period of world-wide economic depression, the inability to maintain prices in the Eastern Hemisphere has had an important role in the production of the world wheat and meat situation. In the United States, the situation has been complicated by government support policies, especially in relation to the recent upward movement of production in Western Europe.

From this brief analysis it will be seen that attempts to make positive movements of future, domestic and international, food production and trade are likely to be affected by a number of very complex factors. The degree of uncertainty in, of course, heightened by the fact that the policies to be applied by the European Economic Community (and other similar organizations) will have to be decided. Thus, while the level of prices which will be applied in such policies may not be affected by international conditions, the level of production which will be realized, on the other hand, will be affected by the international conditions.

VIII. Quota and Tariffs

The policies of the United Kingdom, by far the largest importer of wheat and meat, are of paramount importance to importing countries. The United Kingdom has shown a desire to limit imports of wheat and meat and has recently taken steps to reduce these. In order to meet this situation, the United States is being a substantial exporter, imports of wheat and meat are already affected by quantitative restrictions, import duties, or other controls designed to support domestic production. In the United States, the situation has been complicated by government purchases of livestock and in many countries, especially in the United States, to the high government purchases of livestock. It is difficult to foresee what the duration and extent of the present upward movement will be since this depends on some

price levels. The making of the reaction is obviously of great importance to the making of the policy since the economic policy may be expected to influence the making of the policy of production in the United Kingdom and to continue to expand on the basis of this policy.
<table>
<thead>
<tr>
<th>Year</th>
<th>Production</th>
<th>Retail</th>
<th>Export</th>
<th>Net Imports</th>
<th>Production</th>
<th>Retail</th>
<th>Export</th>
<th>Net Imports</th>
</tr>
</thead>
<tbody>
<tr>
<td>1964</td>
<td>710</td>
<td>260</td>
<td>1965</td>
<td>470</td>
<td>150</td>
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<td>150</td>
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<td>750</td>
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<td>110</td>
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<td>100</td>
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<td>100</td>
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<tr>
<td>1956</td>
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<td>1957</td>
<td>750</td>
<td>250</td>
<td>250</td>
<td>150</td>
<td>200</td>
<td>200</td>
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</tr>
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<td>1958</td>
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<td>1959</td>
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<tr>
<td>1961</td>
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<td>250</td>
<td>150</td>
<td>200</td>
<td>200</td>
<td>200</td>
<td>200</td>
</tr>
</tbody>
</table>

*Excludes ersatz and other products.

**Yearly totals of imports and exports.

*Source: Commonwealth Economic Committee, *Agricultural Bulletin* and *Statistical Abstract*.
### Table 1

**Exports of Beef and Veal from Australia, New Zealand, Argentina, and Uruguay, 1950-1954**  
(Thousand long tons, carcass weight)

<table>
<thead>
<tr>
<th></th>
<th>Australia</th>
<th>New Zealand</th>
<th>Argentina</th>
<th>Uruguay</th>
</tr>
</thead>
<tbody>
<tr>
<td>1950</td>
<td>112</td>
<td>60</td>
<td>106</td>
<td>41</td>
</tr>
<tr>
<td>1951</td>
<td>147</td>
<td>94</td>
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</tr>
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<td>1952</td>
<td>122</td>
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<td>1953</td>
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<td>1955</td>
<td>205</td>
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<tr>
<td>1956</td>
<td>145</td>
<td>99</td>
<td>278</td>
<td>52</td>
</tr>
<tr>
<td>1957</td>
<td>154</td>
<td>(115)</td>
<td>(380)</td>
<td>(40)</td>
</tr>
</tbody>
</table>

**Source:** Commonwealth Economic Committee, _Heal and Intelligence Bulletin_.
Table 5

PRICES OF IMPORTED CHILLED AND FROZEN BEEF IN THE UNITED KINGDOM AND THE UNITED STATES 1956-1963

(Indices 1956 = 100)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Frozen beef from Australia and New Zealand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>United Kingdom</td>
<td>99</td>
<td>&lt;&gt;</td>
<td>144</td>
<td>151</td>
<td>128</td>
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<td>United States</td>
<td>108</td>
<td>147</td>
<td>159</td>
<td>154</td>
<td>148</td>
</tr>
<tr>
<td>Chilled beef from Argentina</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>United Kingdom 1</td>
<td>104</td>
<td>&lt;</td>
<td>127</td>
<td>131</td>
<td>120</td>
</tr>
</tbody>
</table>

1 Sales on the Smithfield market.

2 Unit value index for boneless frozen beef imported from Australia and New Zealand.

Table 6

SUPPLIES OF SELECTED "NEW EXPORTERS" ON THE GERMAN, ITALIAN AND UNITED KINGDOM MARKETS, 1956-1963

(thousand metric tons)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>France to Germany</td>
<td>7.4</td>
<td>&lt;&gt;</td>
<td>&lt;&gt;</td>
<td>11.3</td>
<td>30.3</td>
<td>31.3</td>
</tr>
<tr>
<td>Italy</td>
<td>1.5</td>
<td>1.2</td>
<td>&lt;&gt;</td>
<td>3.3</td>
<td>8.9</td>
<td>8.5</td>
</tr>
<tr>
<td>Netherlands to Germany</td>
<td>0.2</td>
<td>0.3</td>
<td>0.5</td>
<td>1.1</td>
<td>3.3</td>
<td>8.9</td>
</tr>
<tr>
<td>Italy</td>
<td>1.3</td>
<td>6.6</td>
<td>8.5</td>
<td>6.6</td>
<td>14.8</td>
<td>&lt;&gt;</td>
</tr>
<tr>
<td>Yugoslavia to Italy</td>
<td>3.0</td>
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<td>3.1</td>
<td>1.9</td>
<td>8.9</td>
<td>2.2</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>-</td>
<td>&lt;&gt;</td>
<td>&lt;&gt;</td>
<td>1.3</td>
<td>2.1</td>
<td>19.4</td>
</tr>
<tr>
<td>South Africa and Rhodesia and Nyasaland to United Kingdom</td>
<td>-</td>
<td>&lt;&gt;</td>
<td>0.6</td>
<td>9.7</td>
<td>12.3</td>
<td>15.6</td>
</tr>
</tbody>
</table>

Note: The data above are taken from national trade returns of the importing countries. The figures relating to Yugoslav supplies to the United Kingdom include small quantities imported by the United Kingdom from other origins as the United Kingdom monthly trade returns do not distinguish minor origins of imports.

Sources: National trade returns.
### Table 2

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
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</tr>
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<tbody>
<tr>
<td>Argentina, Australia, New Zealanda</td>
<td>3090</td>
<td>3513</td>
<td>3480</td>
<td>3075</td>
<td>3900</td>
<td>2744</td>
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<tr>
<td>Western Europe (50 countries)</td>
<td>4089</td>
<td>4120</td>
<td>4250</td>
<td>4290</td>
<td>4510</td>
<td>4700</td>
<td>(5100)</td>
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<tr>
<td>United States</td>
<td>7860</td>
<td>7185</td>
<td>7090</td>
<td>6485</td>
<td>6510</td>
<td>7070</td>
<td>(7500)</td>
</tr>
</tbody>
</table>

aData for Argentina relate to calendar years while those for Australia cover twelve months starting 1 July of the year stated, and those for New Zealand twelve months ending 30 September of the year stated.

B) Austria, Belgium, Denmark, France, Germany, P.R. Ireland, Italy, Netherlands, Sweden and United Kingdom.

**Sources:** Commonwealth Economic Committee, *Fact and Intelligence Bulletin.* Estimates for 1961 are based on national sources.

### Table 3

<table>
<thead>
<tr>
<th>Producer</th>
<th>For Regular</th>
<th>United Kingdom</th>
<th>Exports</th>
<th>For Regular</th>
<th>Exports</th>
<th>Export prices</th>
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<tr>
<td></td>
<td>(thousand long tons)</td>
<td></td>
<td>(thousand long tons)</td>
<td></td>
<td></td>
<td>(Index 1948 = 100)</td>
</tr>
<tr>
<td>1955</td>
<td>300</td>
<td>385</td>
<td>775</td>
<td>59</td>
<td>97</td>
<td>384</td>
</tr>
<tr>
<td>1955</td>
<td>396</td>
<td>577</td>
<td>267</td>
<td>56</td>
<td>70</td>
<td>354</td>
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<tr>
<td>1956</td>
<td>352</td>
<td>272</td>
<td>54</td>
<td>55</td>
<td>348</td>
<td>141</td>
</tr>
<tr>
<td>1957</td>
<td>279</td>
<td>271</td>
<td>43</td>
<td>46</td>
<td>335</td>
<td>322</td>
</tr>
<tr>
<td>1958</td>
<td>365</td>
<td>274</td>
<td>43</td>
<td>39</td>
<td>310</td>
<td>195</td>
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<tr>
<td>1959</td>
<td>424</td>
<td>302</td>
<td>62</td>
<td>39</td>
<td>364</td>
<td>85</td>
</tr>
<tr>
<td>1960</td>
<td>424</td>
<td>365</td>
<td>66</td>
<td>37</td>
<td>375</td>
<td>107</td>
</tr>
<tr>
<td>1961</td>
<td>356</td>
<td>(358)</td>
<td>48</td>
<td>(354)</td>
<td>347</td>
<td>86</td>
</tr>
</tbody>
</table>

Twelve months ending 30 September of the year stated.

**Sources:** Commonwealth Economic Committee, *Fact and Intelligence Bulletin.*


| Source: Intelligence Bulletin, Commonwealth Economic Committee and national trade returns. |

<table>
<thead>
<tr>
<th>Country</th>
<th>United States</th>
<th>United Kingdom</th>
<th>Germany, F.R.</th>
<th>Italy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Argentina</td>
<td>260 257 257 257</td>
<td>217 217 217 217</td>
<td>19 27 33 33</td>
<td>27 27 33 33</td>
</tr>
<tr>
<td>Brazil</td>
<td>101 101 101 101</td>
<td>101 101 101 101</td>
<td>72 72 72 72</td>
<td>72 72 72 72</td>
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<tr>
<td>Australia</td>
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<td>111 111 111 111</td>
<td>1 5 5 5</td>
<td>1 5 5 5</td>
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<tr>
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<td>11 11 11 11</td>
<td>0.5 1.0 1.0 1.0</td>
<td>0.5 1.0 1.0 1.0</td>
</tr>
<tr>
<td>Other countries</td>
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<td>10 10 10 10</td>
<td>0.5 0.5 0.5 0.5</td>
<td>0.5 0.5 0.5 0.5</td>
</tr>
<tr>
<td>Total imports</td>
<td>260 257 257 257</td>
<td>217 217 217 217</td>
<td>19 27 33 33</td>
<td>27 27 33 33</td>
</tr>
</tbody>
</table>
### Table 11: Customs Duties Applied in Certain Countries

#### 1 January 1953

<table>
<thead>
<tr>
<th>Country</th>
<th>British Proportional</th>
<th>E.C. Members</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cattle</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cattle for slaughter per lb.</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>Sheep for slaughter per head</td>
<td></td>
<td>15%</td>
</tr>
<tr>
<td>Beef and veal per lb.</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Mutton and lamb per lb.</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>Canned beef</td>
<td>40%</td>
<td>20%</td>
</tr>
<tr>
<td>Fresh, chilled or frozen</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beef and veal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mutton and lamb</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canned beef</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Federal Republics of Germany

| Cattle for slaughter         | 11.4%                |              |
| Cows                         | 16%                  |              |
| Sheep for slaughter          | 15%                  |              |
| Beef and veal                | 13%                  |              |
| Fresh or chilled             | 20%                  |              |
| Frozen                       | 13%                  |              |
| Mutton and lamb              | 20%                  |              |
| Fresh, chilled or frozen     | 20%                  |              |
| Canned beef                  | 20%                  |              |

#### France

| Cattle for slaughter         | 16%                  |              |
| Beef                         | 16%                  |              |
| Sheep for slaughter          | 22%                  |              |
| Beef and veal                | 20%                  |              |
| Fresh, chilled or frozen     | 20%                  |              |
| Canned beef                  | 20%                  |              |

#### Italy

| Cattle for slaughter         | 16%                  |              |
| Sheep for slaughter          | 16%                  |              |
| Beef and veal                | 20%                  |              |
| Fresh, chilled or frozen     | 20%                  |              |
| Canned beef                  | 20%                  |              |

#### United States

| Cattle for slaughter         | 11.1%                |              |
| Beef                         | 8.7%                 |              |

---

**Additional Notes:**

- **Duty:** Count in GATT.
- **E.C. Members:**
  - **Duty:** Count in GATT.
  - **Duty:** Count in GATT.
GENERAL AGREEMENT ON TARIFFS AND TRADE

GROUP ON MEAT

Draft of Concluding Section

VII. Developments in Production and Consumption

In reviewing development of world beef and veal production since the early 1950's, it is necessary to consider particularly developments in Western Europe, the United States and the main overseas exporting countries (see Table 7). In Western Europe, in the period 1954/55 to 1959/60, national movements in production were out of phase with one another. Production in France, for example, decreased from 1955/56 and increased again notably since 1959; production in Germany shows a continuously increasing trend with only a small decrease in 1958; production in the United Kingdom shows no substantial variation except for a fall in 1959, and Italian production continuously increased over this period. While it is difficult to discern a definite trend on a country-by-country basis, it can be seen that total production in Western Europe, during the period 1954/55 to 1969/60, had only a slightly increasing tendency, but started to increase rapidly in 1960 and 1961. In the United States, which is the largest producer of beef, a peak in production was reached in 1956 and, after a trough in 1958 and 1959, production increased in 1960 and exceeded in 1961 the preceding peak.

In the main overseas exporting countries Argentinean production increased from 1954 to 1956, but then declined considerably until the recovery in 1961. The trend in production in New Zealand and Uruguay over the period 1954 to 1960 was comparatively stable. Australia on the other hand had a peak production in 1955/56, but because of drought conditions in the beef export producing areas in 1959/60 and 1960/61, production declined considerably. An approximate recovery is noted in Australian production for the current year 1961/62.

Spec(52):134
As a result of these divergent movements in exporting and importing areas, some imbalance in the world meat situation appeared in 1957 with the reduction of domestic production in the United States, and became more serious in 1958 when production of overseas exporters started to decline. In 1961, however, the balance began to swing in the opposite direction, with the simultaneous trend towards increased production in the United States, Western Europe and the major exporting countries in the Southern Hemisphere. According to information given to the Group this trend continued in 1962.

The general trend of increasing production, while due in part to technical improvements in cattle breeding, is in some instances the result of deliberate government action to expand beef production as part of their agricultural policies. Production has also been affected by climatic factors, for example in the United Kingdom where conditions were particularly favourable in 1961. On the other hand the decreases in production referred to, notably in Australia and the Argentine, were to a large extent the result of serious drought conditions.

In respect of beef consumption it was noted that over the period 1955/56 total consumption in Western Europe increased, particularly in Italy, Germany and France. While part of this rise in consumption is in line with the increase of population, it seems largely due to a rise in income levels the United States fall from 62 kilos in 1955 to 39 kilos in 1958 and 1959, consumption in Argentina and Australia dropped approximately in 1958 and 1960. In the overseas exporting countries total beef and mutton consumption in Argentina and Australia dropped approximately in 1959 and 1960. In the New Zealand per capita consumption of beef also showed a decrease in 1960.

Prices

It was noted that prices received by exporters of beef, and particularly such prices for frozen beef, had increased considerably between 1957 and 1960. Since then these prices have tended to fall in the major import markets. This tendency has great importance for exporters, for although the proportion of total meat production entering world trade is relatively small, that proportion is concentrated in a few countries and contributes a significant proportion to their export incomes. Thus, taking the average of the years 1958/59, exports of chilled and frozen beef and mutton represented respectively 14.0, 10.6, 8.4 and 5.8 per cent of the total value of exports of Argentina, Uruguay, New Zealand and Australia.

The effects on production of changes in prices to producers raise fundamental issues. In many importing countries farm resources have been transferred to the production of livestock and in some countries governments have deliberately fostered such a transfer by measures aiming at increasing the level of prices paid to producers or at maintaining prices at a level considered sufficiently remunerative. The extent to which these measures have been instrumental in bringing about increased production is a difficult question to answer with complete accuracy as the effect of price changes in other sectors of farm production and the effects of technological progress would also have to be taken into account.

So far as exporting countries are concerned, price policies which have led to increased production in importing countries have had a prejudicial effect on the degree of access to such as these countries as have regulated imports according to their own production or to internal producer prices. Furthermore, in so far as these changes in production patterns in importing countries have contributed to instability in export prices, exporters have had difficulty in planning future production which in the nature of the industry requires a long-term basis. For similar reasons, when prices fall, producers must accept the market price even if losses are involved as production trends cannot be reversed in the short-term.
Similarly, the relationship between the level of retail prices and the level of consumption at a given income level is a matter of considerable importance for the future of trade in meat and warrants careful consideration. This relationship is a complex one as adjustment of demand to any given change in retail prices may be affected by the existence of substitutes or by other factors, such as consumer preferences or other kinds or another.

Nevertheless, the link is important and needs further study in the application to current and potential markets for meat. It was noted, for example, that when prices have fallen such falls do not appear always to have been reflected in consumer prices.

In the view of exporting members of the Group the demand for beef shows a positive response to significant price decreases and consequently government price support policies as they affect prices at the retail level can have an important bearing on demand and hence trade. The predominant factor in many countries has been the disparity between internal and external prices.

The Group expressed a desire to pursue at a later stage a closer examination of the relationship between wholesale and retail prices. It is hoped that additional information, on which to base such an examination, will become available.


to Exporters

The Group noted that trade was affected not only by tariffs, which were not ignored by exporters as the primary obstacle to their trade, but also by the existence of non-tariff measures such as deficiency payments, variable local duties, quantitative restrictions and certain other measures. Although it was recognized that such non-tariff measures were employed for a number of reasons, it was noted that their employment affected access to markets, in many cases seriously. For example, the representatives of Argentina and evidenced that the lack of outlets for chilled and frozen beef had forced their exporters to export their cattle on the hoof as a result. Furthermore, insist of course affected not only the quantities of meat that could be exported, but such denial had a serious effect on price levels.

It was agreed by the Group that, in most consuming countries, an increase in income levels tends to lead to an expansion of meat consumption. It was the strong desire of exporting countries that, in conducting their policies, importing countries should ensure that exporters should be assured of the opportunity to compete for a share of any significant expansion of consumption which may take place as income levels rise.
VII.

L'évolution de la production et de la consommation

En examinant l'évolution de la production mondiale de viande de boeuf et de veau depuis les premières années 50, il importe de prendre en considération l'évolution qui s'est produite en particulier en Europe occidentale, aux États-Unis et dans les principaux pays exportateurs d'outre-mer (voir tableau 7).


Si l'on considère les principaux pays exportateurs d'outre-mer, on constate qu'en Argentine la production a augmenté de 1954 à 1955, puis a fléchi considérablement pour se retrouver en 1959 sans toutefois retrouver le niveau atteint antérieurement. En Nouvelle-Zélande et en Uruguay, la tendance de la production s'est caractérisée par une stabilité relative de 1954 à 1956. En revanche, une production record a été enregistrée en Australie en 1956/57, suite du fait de la sécheresse dont ont souffert les régions productrices de viande de boeuf pour l'exportation en 1955/56 et en 1956/60, la production a ensuite fléchi. L'année 1956/57 se distingue par un replattement notable de la production australienne. Durant cette même période, l'élevage uruguayen a produit un nombre exceptionnellement élevé de bovins pour l'exportation.
Ces mouvements divergents de la production constatée dans les régions importatrices et dans les régions exportatrices, se sont accompagnés d'une pénurie de la demande, alors même que la production florissait aux États-Unis. La situation de l'offre s'est aggravée en 1959 lorsque la production a cessé de croître dans les pays exportateurs d'outre-mer. En 1961, exponentiel, la production s'est orientée à la baisse à la fois aux États-Unis, en Europe occidentale et dans les grands pays exportateurs de l’Hémisphère austral. Les renseignements dont le groupe dispose à l'heure actuelle indiquent que cette tendance se maintient en 1962.

L’orientation générale de la production dans les pays de la zone qui est due en partie à l’assèchement des techniques d’élevage est parfaitement imputable à l'action délibérée des gouvernements qui vivent, dans le cadre des politiques agricoles nationales, à développer la production de viande de bœuf. La production a été également développée en raison des conditions climatiques, au Royaume-Uni par exemple où le printemps très propice de 1961 a causé la mise sur le marché de bétail gros en quantité anormale. En revanche, les fluctuations de production australiennes, en Australie et en Argentine notamment, sont imputables dans une large mesure à une grave sécheresse.

Les effets sur la production des variations du prix payé aux producteurs posant des problèmes fondamentaux. Dans de nombreux pays importateurs, les ressources des exploitations agricoles ont été affectées à la production de viande, souvent par suite de difficultés de la commercialisation d’autres produits agricoles, et, dans certains pays, les gouvernements ont délibérément favorisé cette réorientation de l’activité agricole par des mesures visant à augmenter le prix payé aux producteurs ou en maintenant ces prix à un niveau considéré comme suffisamment rémunérateur. Ces mesures ont contribué à encourager un accroissement de la production. Il est difficile de répondre avec une absolue précision à la question de savoir dans quelle mesure elles y ont contribué, car il convient également de tenir compte des conséquences des variations de prix dans les autres secteurs de l’agriculture ainsi que des effets du progrès technique. Le groupe a considéré que l’étude de ce problème devrait être poursuivie.

---

| GROUPE ON MEAT - GROUPE DE LA VIENNE |
| Statistiques sur la viande |
| Statistiques concernant la viande |

<p>| (1) | Production net imports and apparent consumption of beef and veal in the United Kingdom, Germany, Italy and United States, 1954-1962 |
| (2) | Production and apparent consumption of beef and veal in Australia, New Zealand, Argentina, Uruguay, France and Denmark, 1954-1962 |
| (3) | Export of beef and veal from Australia, New Zealand, Argentina, Uruguay, France and Denmark, 1954-1962 |
| (4) | Import of beef and veal into four main importing countries by origin, 1954-1962 |
| (6) | Production and trade of mutton and lamb in New Zealand, Australia, Argentina and the United Kingdom, and prices of imported lamb in the United Kingdom, 1954-1962 |</p>
<table>
<thead>
<tr>
<th>Year</th>
<th>Australia</th>
<th>New Zealand</th>
<th>United States</th>
<th>Canada</th>
<th>France</th>
<th>Germany</th>
<th>Spain</th>
<th>The Netherlands</th>
<th>United Kingdom</th>
</tr>
</thead>
<tbody>
<tr>
<td>1954</td>
<td>730</td>
<td>105</td>
<td>1000</td>
<td>105</td>
<td>245</td>
<td>290</td>
<td>300</td>
<td>345</td>
<td>138</td>
</tr>
<tr>
<td>1955</td>
<td>730</td>
<td>105</td>
<td>1050</td>
<td>105</td>
<td>245</td>
<td>290</td>
<td>300</td>
<td>345</td>
<td>138</td>
</tr>
<tr>
<td>1956</td>
<td>730</td>
<td>105</td>
<td>1050</td>
<td>105</td>
<td>245</td>
<td>290</td>
<td>300</td>
<td>345</td>
<td>138</td>
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<tr>
<td>1957</td>
<td>730</td>
<td>105</td>
<td>1050</td>
<td>105</td>
<td>245</td>
<td>290</td>
<td>300</td>
<td>345</td>
<td>138</td>
</tr>
<tr>
<td>1958</td>
<td>730</td>
<td>105</td>
<td>1050</td>
<td>105</td>
<td>245</td>
<td>290</td>
<td>300</td>
<td>345</td>
<td>138</td>
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<tr>
<td>1959</td>
<td>730</td>
<td>105</td>
<td>1050</td>
<td>105</td>
<td>245</td>
<td>290</td>
<td>300</td>
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<tr>
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<tr>
<td>1961</td>
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<td>1050</td>
<td>105</td>
<td>245</td>
<td>290</td>
<td>300</td>
<td>345</td>
<td>138</td>
</tr>
</tbody>
</table>

**Notes:**
- The production data relates to meat from slaughtered animals, including imported cattle and calves.
- In 1960, imports of live cattle are a small percentage of the United States meat and wool output and are shown in the table as negligible.
- The data for the Netherlands in 1958 is shown as zero.
- The data for the United Kingdom in 1959 is shown as zero.
- The data for Germany in 1958 is shown as zero.
- The data for France in 1958 is shown as zero.

**Source:**
### Table 3 - Tableau 3

**Exports of Meat and Malt from Australia, New Zealand, Argentina, Uruguay, France and Denmark, 1954-1963**

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
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<td>196</td>
<td>224</td>
<td>248</td>
<td>268</td>
<td>273</td>
<td>292</td>
<td>316</td>
<td>344</td>
</tr>
<tr>
<td>New Zealand</td>
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</tr>
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<td>Argentina</td>
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</tr>
<tr>
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<td>141</td>
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</tr>
<tr>
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<td>93</td>
<td>93</td>
<td>93</td>
<td>93</td>
<td>93</td>
</tr>
</tbody>
</table>

**Table Notes**

- Exports of live cattle from Argentina, Australia, New Zealand and Uruguay are very small; from France and Denmark they are roughly estimated.
- Exportations d' carcasses sur pieds d'Argentine, d'Australie, de Nouvelle-Zélande et d'Uruguay sont très faibles pour la France et la Danemark, on peut les estimer approximativement 1:

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
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</thead>
<tbody>
<tr>
<td>France</td>
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<td>151</td>
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1. Données sur le marché de l'agneau suédois importé de Suède.
2. Données sur le marché de l'agneau australien importé de l'Australie.
3. Données sur le marché de l'agneau argentin importé de l'Argentine.
4. Données sur le marché de l'agneau finlandais importé de la Finlande.

GENERAL AGREEMENT ON
TARIFFS AND TRADE

BRIEF NOTE ON RECENT DEVELOPMENTS IN TRADE IN BEEF AND VEAL
AND IN MUTTON AND LAMB

I. Trade in beef and veal

World trade in carcase beef and veal expanded during 1963 for the second consecutive year. Whereas in 1961 the expansion was almost exclusively accounted for by the strong rise in exports from European countries, in 1962 larger quantities were exported both by the European and the overseas exporting countries. In particular, exports from the latter group of countries, which declined continuously, by about one fifth, between 1960 and 1961, recovered in 1962 from their low level of the previous year, reflecting among other the higher levels of production, stagnant domestic supplies in the United States and a slowing down in the rate of growth of production in Western Europe.

A main feature of the world market in 1963 was the continued strong expansion of imports, consisting mainly of frozen boneless beef, into the United States, which became the most important market for carcase beef and veal. As domestic production remained at about the previous year’s level while demand, especially for manufactured beef, continued to expand greatly, imports of beef and veal rose by about 50 per cent above their previous peak of 1961 to a level only slightly below the 400,000 tons mark. Absorbing more than half of world exports from non-European countries. The great bulk of the United States increased beef requirements were supplied by Australia, imports from that country being about twice as great as in 1961 and accounting for more than half of the total. Imports from New Zealand also expanded substantially, by about 40 per cent, and their share in total imports rose to nearly one quarter.

Among the smaller suppliers, imports from Mexico were also heavier than in 1961, while those from Ireland did not show any increase and those from Canada declined.

During the first three months of 1963 imports of beef and veal into the United States continued to rise and, largely due to heavy shipments from Australia, were by 10 per cent above the corresponding period of 1962.

1At the same time imports of live cattle also reached a record level of nearly 1,200,000 head, an increase of more than one fifth over 1961. The increase was entirely accounted for by larger imports from Mexico, which accounted for about 60 per cent of the total, while those from Canada remained at about their 1961 level.
In the United Kingdom domestic production, which had increased by as much as 10 per cent in each of the two preceding years, showed only a slight further expansion of about 2 per cent, in 1962, when imports of carcass beef and veal, which were continuously declining between 1957 and 1961, recovered to a level of about 330,000 tons, an increase of 15 per cent over 1961, but still well below the average of earlier years. The increase in imports was essentially due to larger supplies—especially of chilled beef—from Argentina, which recovered from their very low level of 1961, their share of total imports rising to about 54 per cent, and from Yugoslavia which in 1962 increased its share from 11 per cent, about the same as that of shipments from Australia. Among supplies of minor importance, imports from Ireland, Uruguay and New Zealand declined in 1962.

In January-April of this year imports of beef and veal were considerably, by about 25 per cent, above the corresponding 1961 figure, due especially to a large increase in supplies—mainly chilled beef—from Argentina which amounted to nearly 107,000 tons, about two thirds of the total, while imports from Yugoslavia were only slightly, and those from Australia substantially, below the corresponding period of 1961.

In Western Germany demand for beef continued to rise substantially in 1962 and although domestic supplies were by some 8 per cent larger than in 1961, imports of carcass beef and veal continued their upward movement and exceeded 100,000 tons, an increase of nearly one quarter as compared with 1961. The most pronounced increases were in receipts from France and Argentina, the two main suppliers, which in 1962 accounted for 47 and 20 per cent, respectively, of total imports. Another 18 per cent were accounted for by the combined imports from Denmark, which rose sharply, and those of Netherlands, which showed only a slight increase, while shipments from Uruguay and Ireland were below their 1961 level.

In Italy, where in 1961 domestic production had increased by as much as 20 per cent and imports of beef and veal fell by 60 per cent as compared with the previous year, the rise in demand in 1962 exceeded that of domestic supplies and imports of beef rose substantially above their exceptionally low level of the previous year, but were still below the average of 1959-1960. The most pronounced increases were in receipts from Argentina, the chief source, which amounted for 47 per cent, and from Denmark, which accounted for nearly one fifth of the total.

By contrast, live cattle imports, mostly from Ireland, declined by some 15 per cent, to about 370,000 head. The decline was accounted for by smaller entries of fat cattle, while imports of store cattle were maintained at about their 1961 level.

Imports of beef from Western European countries, which in the preceding years had not exceeded 20,000 tons per year, showed a sudden sharp rise in 1962, when they amounted to about 100,000 tons, of which nearly three quarters were imported by the Soviet Union.

In Australia, where production increased by about one quarter, in 1961/62 as compared with the previous season, exports of carcass beef and veal increased substantially during 1962 when they were more than 50 per cent higher than in the preceding year. This increase was exclusively due to the rapid rise in shipments to the United States, which were twice as high as in 1961, while those to most other countries declined. During July-September of the current season 80 per cent of exports from Australia went to the United States, as against 50 per cent in the corresponding period of 1960/61.

The increase of about one fifth in New Zealand's exports of carcass beef and veal was also exclusively due to the strong expansion of supplies to the United States, which absorbed in 1962 more than three quarters of the total, while exports to the smaller markets, including the United Kingdom, were below their 1961 level.

In Argentina, where production had declined sharply, by about one quarter, between 1958 and 1960, for the second consecutive year slaughtersings increased in 1962, partly as a result of a severe drought during the second half of the year. After a continuous decline between 1959 and 1961, exports of beef and veal were in 1962 substantially above their low level of the previous year. The increase was due to heavier shipments both to the main market, the United Kingdom, which took about 60 per cent of the total, and to Italy, Western Germany and other Western European countries.

Exports of beef and veal from Uruguay increased by more than 40 per cent over 1961, but were only slightly above the level of 1960. This increase was mainly due to the development of exports to the Soviet Union which accounted for nearly 30 per cent of the total export. By contrast, exports to the main two markets of the previous years, the United Kingdom and Western Germany, were smaller than in 1961.

A salient feature of developments in the main net exporting countries of Western Europe during 1962 was the large increase of about 50 per cent in exports of carcass beef from France, which became for the first time the most important exporter of beef (including live cattle) in Europe. The bulk of the increase was accounted for by exports to the Soviet Union, which exceeded 40,000 tons (only slightly less than exports to the main market, Western Germany), to other Western European countries and to Spain. In Germany the increase in exports of carcass beef and veal during 1962 was a large extent offset by smaller deliveries of live cattle, while in Ireland exports of both carcass beef and live cattle declined.

Exports of live cattle, however, declined from 120,000 to 90,000 head between 1961 and 1962.
From the fragmentary information available on pricing movements it appears that prices of chilled and frozen beef for the second consecutive year declined in 1968 in the main importing countries, with the exception of the United Kingdom, where there was a slight recovery from the depressed level of the previous year.

In the United States average unit values of frozen boned beef from Australia and New Zealand, which had increased by about 50 per cent between 1955-57 and 1959-60, were declining since then, were in 1968 nearly 20 per cent below their 1961 level, and still about 30 per cent higher than in 1955-57.

Price quotations for chilled beef from Argentina, in the United Kingdom, which in 1961 declined by nearly 10 per cent as compared with the previous year, recovered during 1968 when they were, on average, about one fifth higher than in 1955-57. By contrast, average unit values of beef imported from Argentina into Germany and Italy declined for the second consecutive year and were in 1968 not only about 15-20 per cent lower than in 1965, but also below their level of 1955-57.

II. Trade in cotton and wool

In the United Kingdom, output of cotton and wool, following a sharp rise in 1951, declined by 5 per cent in 1960. Imports into this country, which represent about 10 per cent of the world total, were about 2 per cent lower than in the previous year, but remained considerably lower than their high 1951 level. Reports from New Zealand, for the second consecutive year, were slightly larger due mainly to reduced exports to the United Kingdom, which was about 10 per cent of the total. Average prices of wool on the Witthief market recovered in 1968 from their low level of the previous year, but were still below the average of 1966.

During the first four months of this year imports of cotton and wool into the United Kingdom were by about 10 per cent higher than in the corresponding period of 1965 due mainly to larger shipments to the United States. Exports from Australia also increased, but the amount of larger shipments both to the United Kingdom and the United States.

### Table: Trade in Cotton and Wool (thousand tons - all values in US dollars)

<table>
<thead>
<tr>
<th>Country - Pays</th>
<th>Year - Année</th>
<th>Rice (tonnes)</th>
<th>Sheep (tonnes)</th>
<th>Wool (tonnes)</th>
<th>Meat (tonnes)</th>
<th>Total</th>
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<tr>
<td>Australia - Australie</td>
<td>1961</td>
<td>17</td>
<td>30</td>
<td>1</td>
<td>14</td>
<td>62</td>
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<tr>
<td>Canada - Canada</td>
<td>1961</td>
<td>93</td>
<td>115</td>
<td>-</td>
<td>-</td>
<td>118</td>
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<tr>
<td>Ireland - Irlande</td>
<td>1961</td>
<td>143</td>
<td>105</td>
<td>7</td>
<td>24</td>
<td>288</td>
</tr>
<tr>
<td>Poland - Pologne</td>
<td>1961</td>
<td>6</td>
<td>22</td>
<td>2</td>
<td>32</td>
<td>65</td>
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Note: The data in the table above refer to raw cotton, as regards live animals, national statistics generally report numbers of animals exported which had to be converted into raw equivalent, due to the lack of exact information on regards to weight of export animals, these conversions may not always be very precise.

Les chiffres de la table ci-dessus concernent du coton brut, concernant les animaux vivants, les statistiques nationales indiquent en général le nombre d'animals exportés et une conversion en équivalent de viande, mais dûs à la nature d'inexactitude des chiffres, ces conversions ne sont pas toujours très précises.

Sources: The trade yearbook 1968 - Commerce de commerce 1968.
GENERAL AGREEMENT ON
TARIFFS AND TRADE

Points for Discussion Suggested by the Secretariat

1. Products included in discussion
   The discussion would centre on meats of cattle and sheep, it being understood that live cattle and other types of meat might be brought into consideration at a later stage.

2. Agricultural policies
   The discussion should cover the whole range of agricultural policies in importing and exporting countries, in particular production policies including negative measures and measures at the frontier, where appropriate.
   
   Internal measures
   The discussion should include questions of
   - restraint on price and/or income support, so as not to unduly encourage domestic production nor discourage increases in consumption,
   - disparities of consumption levels in different countries.

   Measures at the frontier
   The discussion should include questions of
   - negotiability of variable levies, quantitative restrictions, minimum import prices and other import barriers,
   - veterinary restrictions.

3. International trade
   The discussion should include questions of international prices and the creation of acceptable conditions of access.
Access
The discussion should include questions of
- maintaining a balance between domestic production and imports,
- opportunities for exporting countries to compete for participation in meeting market demand,
- elimination of discrimination in opportunities for access,
- market sharing arrangements, including provisions for co-ordinated access for traditional suppliers and participation of new suppliers,
- assurance of supply.

International prices
The discussion should include questions of
- stabilization of international prices through measures aimed at a co-ordinated balance between world supplies and demand, or through measures directly affecting international prices, such as minimum prices, price ranges, etc.,
- gradual elimination of export subsidies.

4. Other matters for discussion
- procedures for confrontation on production, import and export policies,
- other procedural questions,
- the possibility of concluding local agreements between the States principally concerned with a particular market,
- the necessity for interim arrangements,
- surplus disposal and market development,
- methods of formulating within the framework of the Trade Negotiations the eventual results of the Group's discussions.

ACCORD GENERAL SUR LES TARIFS
DOUANIERS ET LE COMMERCE

GROUP RESPONSIBLE - SECRETARIAT

POINTS A EXAMINER - SUGGESTIONS DU SECRÉTAIRAT

1. Produits à examiner
L'examen porterait essentiellement sur les viandes de boeuf et de mouton; cependant, la discussion pourrait être étendue par la suite au bétail sur pied et à d'autres types de viandes.

2. Politiques agricoles
L'examen devrait porter sur toute la gamme des politiques agricoles des pays importateurs et exportateurs, et en particulier sur les politiques de production, y compris les mesures d'ordre intérieur et les mesures appliquées à la frontière, le cas échéant.

Mesures d'ordre intérieur
L'examen devrait porter sur les questions suivantes:
- limitation du soutien des prix ou des revenus, afin de ne pas encourager l'accroissement de la production intérieure et de détourner les acquis de la consommation,
- disparité entre les niveaux de compensation des différents pays.

Mesures appliquées à la frontière
L'examen devrait porter sur les questions suivantes:
- négociabilité des prélèvements variables, des restrictions quantitatives, des prix minimaux à l'importation et des autres obstacles à l'importation,
- restrictions d'ordre vétérinaire.

3. Commerce international
L'examen devrait porter sur les questions de prix internationaux et sur celles qui sont liées à la création de conditions acceptables d'accès.
L'examen devrait porter sur les questions suivantes:

- maintien d'un équilibre entre la production intérieure et les importations,
- possibilités offertes aux pays exportateurs de faire acte de concurrence en vue de bénéficier pour une part de la demande du marché,
- suppression de la discrimination en matière de possibilités d'accès,
- arrangements pour le partage des marchés, y compris dispositions en vue d'un accès coordonné pour les fournisseurs traditionnels et d'une participation de fournisseurs nouveaux,
- garanties d'approvisionnement.

Prix internationaux

L'examen devrait porter sur les questions suivantes:

- stabilisation des prix internationaux au moyen de mesures qui viendraient à établir un équilibre coordonné entre l'offre et la demandemondiales, ou de mesures qui agiraient directement sur les prix internationaux, comme la fixation de prix minimaux, d'éventuels de prix, etc.,
- élimination progressive des subventions à l'exportation.

4. Autres questions à examiner

- procédures de confrontation des politiques de production, d'importation et d'exportation,
- autres questions de procédure,
- possibilité de conclusion d'accords locaux entre les États principalement intéressés à un marché particulier,
- nécessité de conclure des arrangements intermédiaires,
- déclencher des excédents et développement du marché,
- méthodes à appliquer pour donner un caractère formel aux résultats finaux des débats du Groupe dans le cadre des négociations commerciales.

The Group on Meat, after its discussion at the meeting of 3-5 July 1963, requested the secretariat to prepare a summary record of the discussions. A draft summary record is hereby circulated to the members of the Group. Comments by delegations on the statements attributed to them are invited before the end of August 1963.
Introduction

1. The Group met in Geneva from 1-5 July 1963 in order to initiate its work on the basis of the instructions by the Ministers. Papers had been submitted to the Group by the Governments of Argentina (Spec(63)186), Australia (Spec(63)197), New Zealand (Spec(63)203), and the United Kingdom (Spec(63)192). A list of points for discussion was suggested by the secretariat and amended in the light of the comments made at the meeting (Spec(63)208/Rev.1).

Introductory statements

2. The representative of the United Kingdom introduced the paper submitted by his delegation. His statement has been circulated to the Group as document Spec(63)193.

3. The representative of the USA explained the position of his delegation. While the USA was in principle prepared to study all aspects of the meat problems, his delegation was not in a position to take part substantively in the present discussion, since no common policy for beef and veal had as yet been established. A communication by the USA had been circulated as document Spec(63)194.

4. The representative of Australia in introducing the paper submitted by his delegation described the importance to exporting countries of trade in meat. He stressed that vast areas in his country relied solely on cattle raising, so that it would not be practicable to restrain production in such areas. In relation to access, the problems of internal assistance in the major importing areas and of protective barriers at the frontier would have to be considered. The question of international prices at a level remunerative for efficient producers was also part of the problem. He expressed doubt as to the practicability of a system of minimum import prices as suggested by the United Kingdom, but this needed to be explored further. Other issues, such as the implications of veterinary regulations, were also important and should be considered. He felt that participating countries should undertake not to take action which would aggravate the international trade problems for meat.
5. The representative of New Zealand introduced the New Zealand paper and stated that, in his view, the aim of the work of the Group should be to provide opportunities for the efficient exporting countries to increase their export earnings to the maximum extent consistent with their ability to provide meat at competitive prices. Although he considered that it was not unreasonable to expect the normal application of the rules of GATT, he realized that the modification of internal meat policies was a politically sensitive matter. Conditions of access had to be created in such a way that they were acceptable to all parties concerned. He went on to say that, because of the great variety in type, price and quality of meat products, there was not one international meat market but a series of different markets which were more or less related. The specific problems of each market had to be considered. The differences in levels of consumption as between various countries and the factors which led to these disparities also required consideration. He expressed concern about the present trend in production, particularly in importing countries. Such production increases would certainly have an impact on the position of traditional exporters. The Group at this stage was not in a position to start substantive discussions on an international meat agreement, but in any case a market sharing arrangement as suggested by the United Kingdom would not be acceptable to his delegation since this would mean a standstill instead of a development of the market.

6. The representative of Argentina briefly summarized the paper presented by his delegation. He stressed the fact that there were three main import markets for meat. These had very differing characteristics, which would make it impossible to establish a single set of criteria for the development of international trade in meat. As regards the objectives of any arrangements, a distinction should be made between long-term, medium and short-term objectives. The Argentinean suggestions in this respect were spelt out in document Spec(6)206. While agreement would have to be reached on any long-term objectives, particular arrangements could be designed in order to reach the medium or short-term objectives for specific meats for which there were special problems.

7. The representative of Uruguay also felt that for exporting countries, the essential aim was to receive treatment which was in conformity with the provisions of GATT. Nevertheless, his delegation was prepared to consider other solutions which would lead to acceptable conditions of access; it was obvious that this meant an expansion of the market and of trade in meat. The question whether the problems of international trade in meat could be solved by the conclusion of an international meat agreement would have to be carefully considered.

8. The representative of the United States made a statement which was circulated to the Group as document Spec(5)211.

9. The Group proceeded with its discussions on the basis of a list of points suggested by the secretariat and circulated as document Spec(6)205/Rev.1.

Products included in the discussions

10. The discussion concentrated on meat of cattle and sheep. It was understood that live animals and other types of meat would be borne in mind and might, as appropriate, be brought into discussion at a later stage.

Agricultural policies

Internal measures

11. The representative of New Zealand drew attention to the statement made in the paper submitted by his delegation that, unless the tendency towards self-sufficiency in some major import markets was checked, a serious situation could be foreseen for meat exporting countries. The objective of achieving an improvement in the conditions in access to the world's major existing or potential meat import markets implied a reduction or limitation of present and prospective levels of protection.

12. The representative of the United Kingdom recalled that the paper submitted by his delegation included the concept of restraint on price support.

13. The representative of Australia questioned the question of internal measures as part of the conditions of access. He pointed out that the volume of meat entering into international trade was only small in relation to meat production...
in the large importing countries, so that, even taking into account possible increases in consumption, a relatively small increase in production in the large importing countries could have a disproportionately large adverse effect on international trade. He stressed that, at an appropriate stage, all aspects of national policies affecting meat production would have to be considered.

14. The representative of New Zealand, commenting on the existing disparities in consumption levels between different countries, expressed the view that many of such disparities were the consequences of import policies of the importing countries. He would expect importing countries eventually to undertake certain commitments as regards the height of the domestic support price level; the height of production subsidies; a limitation of their prices or income support to a certain negotiated standard quantity; and as regards any other measures affecting production or price policies.

15. The representative of the United Kingdom stated that the per capita beef consumption in his country since the abolition of rationing had not shown such an increase as was expected and it was still below the pre-war average. Consumption of mutton was fairly stable, on the other hand consumption of pig meat and poultry had increased substantially. The present situation was such that relatively small increases in meat supplies led to a quite disproportionate fall in prices.

16. The representative of Denmark stressed the importance of examining, during the Group's further work, the relationship between domestic consumption and availabilities and prices.

17. The representative of the United States explained that beef imports into his country consisted predominantly of frozen boneless meat for manufacture, a type of meat for which there was a strong demand inadequately covered by domestic supplies.

18. The representative of Argentina drew attention to the fact that the disparities in consumption between the various countries were not in keeping with disparities in income levels. Other factors such as availabilities of animal proteins from various sources and problems of distribution and marketing also affected meat consumption. He expressed the hope that importing countries would supply information regarding these aspects for the benefit of the further work of the Group.

19. The representative of the USSR gave some details about projections of consumption, production and imports of beef for the Community in 1970. These projections were based on the assumption of an average increase in population in the whole Community of 3.7 per cent over the period 1965-1970, and a development in income of 4 per cent annually. The projections showed an estimated increase in total beef consumption in the Community during this period of 1,174,000 tons, from 3,084,000 tons in 1955 to 4,258,000 tons in 1970. There were, however, appreciable variations in the increase per member State, ranging from 4 per cent in Belgium and Luxembourg to 8 per cent in Italy. The projection for the average per capita consumption in 1970 was 10.5 kilograms per year, which was still less than the per capita consumption in countries like Denmark and the United Kingdom. It was estimated that total beef production during this period would increase from 3,084,000 tons in 1955 to 4,685,000 tons in 1970, an increase of some 50 per cent. The figures would leave room for total net imports into the Community to increase to 339,000 tons, which meant an increase of 81,000 tons as compared to total beef imports of 258,000 tons in 1955. Imports would however vary greatly between the member States. He stressed that such figures should be used only with great caution. Beef production, for example, was closely related to dairy production and would, therefore, depend not only on developments in the meat sector but also on the dairy situation. Furthermore, the projections were based on certain price assumptions. Variations in price would have an appreciable bearing on the figures for consumption and it was impossible to make any predictions about the price level in the Community in 1970.

20. The representative of Denmark stressed the close relationship between the problem of reducing the great variety of protective measures and the problem of the establishment of a fair and stable price level in international trade in meat.
All countries, both importers and exporters, endeavoured to secure a more fair and stable income for their producers. It was for consideration whether there was a possibility of co-ordinating the various systems in such a way as to provide a fair balance in the rights and obligations of the participating countries. Another question was whether importing countries were prepared to adapt their systems of protection so as to bring the degrees of protection in these countries more in line with one another.

21. The representative of New Zealand stated that the extent to which his country received improved terms of access would determine its participation in the Trade Negotiations as a whole. It was essential, in his view, for importing countries to modify the internal policies which encouraged high cost production, so as to leave room for trade to expand on a more satisfactory basis. He recognized, however, that this could only be achieved as a long-term objective. In the meantime, it was essential that present trade conditions should not deteriorate and that importing countries should gradually bring the terms of access more in line with their obligations under the GATT. In this connection, he referred to the findings of Committee II which stated in its third report that while meat trade conditions were favourable for the relaxation, indeed for the removal, of barriers to trade. In particular, as regards trade in mutton and lamb, it was found that the removal of restrictions on imports was unlikely to result in a sudden or large increase in imports. He pointed out that there was no important stocks of meat, nor would it be possible to increase production so rapidly that markets might be disrupted. He further stated that his delegation opposed the concept of a balance between domestic production and imports, whereby domestic producers would have a pre-emptive right to market their products within the country. The question of price was important in this connexion and he felt that prices should be set at a level representative of efficient production: the level should not be such as to leave high cost production unchecked. As regards the question of opportunities for exporting countries to compete for participation in meeting market demand, this question would not arise if import barriers were sufficiently relaxed.

22. The representative of Australia expressed the view that where countries only afforded protection by means of a tariff, the level of these tariffs could be subject to negotiations. Similarly, where protection was afforded by various measures, such as internal measures and measures at the frontier, negotiations would only be meaningful if countries were prepared to undertake commitments as regards these measures, to the extent that they had implications for international trade. The conditions of entry had to be predictable and the degree of protection had to be known in advance. Furthermore, the negotiations should not just aim at maintaining the current situation but should lead to increasing shares for exporting countries. It would not be acceptable if imports were reintroduced only in accordance with fluctuations in internal demand or production. Obligations undertaken by industrialized importing countries in this field should be comparable to the kind of concessions those countries expected to receive in the trade negotiations for their industrial exports. As regards the question of the elimination of discrimination in opportunities for access, he emphasized that this should apply not only to discrimination in quantitative terms and in the capacity to compete, but also to the situation whereby there was discrimination between different meat products. He further expressed the view that future discussions, after agreement had been reached on certain principles, should deal with the means by which these principles were to be implemented and also with the level of prices, namely the international prices in the absolute sense and the relationship between domestic producer and consumer prices. The exporting countries, on the other hand, should be prepared to consider undertakings in respect of assuring regular supplies and avoiding disruption of the major import markets.

23. The representative of Uruguay stressed the importance of eliminating the uncertainty about measures at the frontier. Any solution should give producer countries the possibility of carrying out reasonable production planning. This would facilitate the maintenance of a fairly stable level of production, which would be beneficial both to exporters and importing countries. As regards measures which were currently maintained inconsistently with the GATT, he expressed his understanding that such measures would be included in the negotiations but that exporting countries would not be expected to grant concessions in return
for commitments in regard to such measures undertaken by the importing countries concerned. As regards the maintenance of veterinary restrictions, he did not contest the legiiitsy of such restrictions but in the work of the group consideration should be given to ways and means of ensuring that such regulations in their operation would not have unduly restrictive effects.

26. The representative of the United Kingdom stated that his Government wanted to see trade preserved with its traditional suppliers. On the other hand, domestic meat production constituted a very important part of meat supplies in the United Kingdom, while, furthermore, assurances against deficiencies in supply were necessary. He pointed out that, by its nature, it was not possible to change the level of meat production suddenly. Neither would it be desirable to have sudden changes in imported supplies; these would bring about quite disproportionate changes in prices. For these reasons the United Kingdom suggested the maintenance of a certain balance between domestic and imported supplies.

As regards deficiency payments he stated that, while the United Kingdom wished to see a reduction in the total amount of its deficiency payments, it was not in favour of doing so by means of forcing prices upwards. This would have quite considerable implications in other economic sectors. The new policy the United Kingdom Government now had under consideration would provide for an restraint on home production, some increase as to the level of access and assurances as regards the participation of exporters in any expansion in the market.

27. The representative of New Zealand enumerated various ways in which importing countries discriminated against other countries, groups of countries or against particular types of meat. He stressed the importance of eliminating such practices. He opposed the principles of market testing and co-ordinated access and expressed the view that such supplies should compete for a share in the market without disturbing their competitive position by means of export subsidies. It was premature to consider a proposal for market sharing in isolation. Such proposals needed much more examination. He emphasised that conditions of trade should be known and predictable. This applied to such devices as tariffs, variable import levies, minimum import prices, etc. He pointed out that even with a fixed and negotiated minimum import price, it could happen that domestic prices fell below this price so that imports could no longer compete. He also stressed the necessity of ensuring veterinary regulations so that such regulations would not be used as restrictive or discriminatory devices.
30. The representative of the United Kingdom recognized that a system of
market sharing as suggested by his delegation might not be applicable to all
markets. His Government wanted to keep any arrangement as flexible as possible
but, in the present situation of free access and unchecked domestic production,
the United Kingdom felt obliged to take action. His delegation would like to
see an arrangement which brought stability to the trade in meat and afforded
the United Kingdom an opportunity to meet its domestic difficulties.

International prices

31. The representative of Australia, addressing himself to the question of
international prices, pointed out that in the present situation where there
were only a few residual markets, world prices fluctuated widely and were not
remunerative for efficient producers over a sufficiently long period. This
was partly because of increasing quantities of subsidised domestic supplies
coming on the market and because of imports from countries granting export
subsidies. Any arrangement should be such that the burden of low prices would
not simply be put on efficient exporters. He also pointed out that currently
there was a great disparity in prices on different markets. Therefore, there
should be a closer relationship between various markets in order to avoid
diversion of trade to the more remunerative markets and in order to achieve a
more stable world price.

32. The representative of Australia expressed the view that any arrangement
should be based on realistic and remunerative prices for all countries, so that
while the interests of domestic producers were protected at a reasonable but
not artificial level, the interests of exporters were safeguarded at the same
time. Such an equalization of interests implied a limitation of the overall
value of subsidised production. Exporting countries should be prepared to
exercise a certain discipline as regards their exports and should undertake to
eliminate export subsidies. Importers, on the other hand, should accept a
commitment not to purchase subsidised meat.

33. The representative of Germany stressed the necessity of eliminating the
present uncertainty regarding conditions of access to the major markets. This
difficulty gave rise to particular difficulties for the exporting countries.

He supported the ideas expressed concerning the improvement of relations
between the various markets by removing restrictive practices and equalizing
import conditions. He also supported the principle of the removal of export
subsidies.

34. The representative of the United Kingdom felt that it would not be
possible to have a uniform international price for most. Too many factors had
an influence on the price. Changes in price would have an immediate effect on
corporate earnings and a rapid increase in prices would bring about a decline in
consumption and consequently reduce sales opportunities. Furthermore, costs of
production in efficient producing countries depended on differences in price
and cost levels. He agreed with the principle of stable prices. In the
United Kingdom, prices had been highly unstable because of unexpected arrivals.
Exporting countries should undertake commitments as regards phasing of supplies
to import markets so as to avoid sudden price changes. The establishment by exporters
of an efficient marketing intelligence service might be considered in this
connection.

35. The representative of Australia, while agreeing that a rapid price increase
would adversely affect consumption, pointed out that present prices were
unsatisfactory for efficient producers. In his view prices would not
necessarily have to be the same in all countries. While recognizing the need
for an arrangement to phase supplies in an orderly manner, he pointed out that
the present situation did not result only from fluctuations in imports.

Other matters for discussion

34. The representative of New Zealand favoured the establishment of confronta-
tion procedures. Several commitments undertaken both by importers and exporters,
arising from the trade negotiations as a whole, would be dealt with in such
procedures. Also questions of discriminatory supplies and assurances for regular
supplies could be discussed during such confrontations.

35. The representative of Australia also supported the establishment of confront-
tation procedures. If obligations were sufficiently specific, appropriate
confrontation procedures could be of much value.
36. The representative of the United Kingdom doubted whether a single agreement was appropriate for dealing with the various aspects of different markets. He felt that at a later stage the possibility of having some sub-agreements within the framework of an overall agreement should be considered.

37. The representative of Argentina supported the establishment of confrontation procedures through which, in the light of developments, the need for any corrective measures should be considered.

38. The representative of the United Kingdom stated that in the period before any arrangement was finalized, his country would be unable to avoid taking measures of the kind suggested in the United Kingdom paper. His Government, in taking such interim measures, would take into account the views expressed by members of the Group and would like to see those measures eventually incorporated in, or replaced by, an international arrangement.

39. The representative of Australia, supported by some other members of the Group, emphasized the desirability of countries not taking any action which would involve new elements of a restrictive character in advance of a substantive discussion by the Group. Such action would have a prejudicial effect as regards the kind of arrangement which might come out of the Group.

40. The representative of Australia, in addressing himself to the question of surplus cereal and market development, expressed the view that currently there seemed to be little scope for developing new markets. The low level of income in many countries and dietary habits were great impediments and it had to be recognized that any development of new markets would be in line with the economic and industrial development of those countries.

41. The representative of Argentina stated that surpluses in the meat trade were not only temporary and of a short-term character. If serious opportunities were improved, there would be no structural surpluses.

42. The Group received an application by the Government of Yugoslavia for membership of the Group and invited the representative of Yugoslavia to present its case. The Group welcomed the application and accepted it on the grounds that from the outset Yugoslavia had shown a keen interest in the work of the Group, as evidenced by the fact that prior to the first meeting of the Group on Meat, it had presented a request to the Trade Negotiations Committee to participate in that work. In addition, it was apparent from the statement by the Yugoslav representative and from that country’s foreign trade statistics that Yugoslavia had a substantial interest in trade in meat.

Programme of work

43. It was agreed that the aim should be to advance the work of the Group to the stage where early in 1958, substantive negotiations might be begun in accordance with the terms of reference of the Group.

44. Although the EEC did not take part in the substantive discussion, its position was clarified as regards the programme of work. The EEC representative expressing the hope that the Group would not meet again except to the extent that the Community regulations on meat of the bovine species had been drawn up in final form.

45. Most members of the Group made it clear that they attached great importance to the next meeting of the Group being held in the summer and it was essential for the successful preparation of the work of the Group that all members should then be in a position to discuss the relevant questions of substance.

46. It was agreed that the actual date of the next meeting should be determined by the Chairman in consultation with the members of the Group but that the aim should be as mentioned above, for the next meeting to take place in the summer.
GENERAL AGREEMENT ON TARIFFS AND TRADE

DEPARTMENTS AND COMMITMENTS IN THE NEGOTIATIONS

1. The Group had a meeting on 26 November 1965 in which it listed elements to which consideration should be given in negotiations for a general arrangement on meat. It was generally accepted that in agreeing on this list, no member of the Group prejudiced its position on a particular point and the Group noted the position of the European Economic Community which had not yet defined a common policy for some of the products considered.

2. It was agreed that at the next meeting of the Group, all members would be prepared to participate fully in the negotiations, in line with the decisions taken by Ministers in May 1965 to create acceptable conditions of access to world markets for meat in pursuance of a significant development and expansion of world trade in meat. It was agreed that all relevant elements in the following list would be taken into consideration in the negotiations.

(a) Products included in the negotiations
   The negotiations would relate mainly to meat of cattle and sheep, it being understood that live cattle and other types of meat would be brought into consideration where appropriate and necessary.

(b) Agricultural policies
   All relevant elements of national policies relating to meat in importing and exporting countries, in particular production policies, including:

   (i) Internal measures
       - Intervetion support policies and other organisation measures as they affect levels of domestic production and consumption.
3. The Group recognized that the negotiations were an integral part of the trade negotiations as a whole, which were due to commence on 4 May 1964. In order to fit in with the time-table for the general trade negotiations and in view of the fact that negotiations in the Group would necessarily be lengthy and complicated, it was agreed that a negotiating meeting should begin as early as practicable in 1964. A precise date would be left to the Executive Secretary to determine, in consultation with the members of the Group, but it was hoped that this meeting would be scheduled to commence in late February.
This draft list is submitted to the members of the Group on Meat for their
attention in selecting and identifying products which they might consider it
desirable to include in the negotiation of world arrangements.

01.02 Live animals of the bovine species
01.03 Live swine
01.04 Live sheep and goats
01.05 Live poultry, that is to say, fowls, ducks, geese, turkey
and guinea fowls
02.01 Meat and edible offals of the animals falling within
heading No. 01.03, 01.05, 02.03 or 01.04, fresh, chilled or
frozen
02.02 Dried poultry (that is to say fowls, ducks, geese, turkey
and guinea fowls) and edible offals thereof (except liver), fresh,
chilled or frozen
02.06 Meat and edible meat offals (except poultry liver), salted,
in brine, dried or smoked
16.01 Sausages and the like, of meat, meat offal or animal blood
16.02 Other prepared or preserved meat or meat offal
L'OBJECTIF

1. Le projet de liste est soumis au Groupe de la viande aux fins de sélection et d'identification des produits que le Groupe contiendra simultanément d'inclure dans la négociation d'arrangements mutuels.

2. Le Groupe a tenu trois réunions, du 3 au 5 juillet 1962, le 26 novembre 1963, et du 9 au 14 avril 1964. Elles furent organisées par le Gouvernement d'Argentine (Spec(A)706), Australie (Spec(A)07 et Spec(A)76), le Royaume-Uni (Spec(A)87), Nouvelle-Zélande (Spec(A)203 et Spec(A)76), la Confédération des États-Unis et l'Afrique du Sud (Spec(A)2385) et la Région de l'Union Européenne (Spec(A)190).

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4. Many countries emphasized that there were several markets for meat with characteristics so different that it would be difficult to establish a uniform set of criteria for the development of international trade in that product. In their view, the Group should examine the particular situation of each meat market and each type of meat, with a view to identifying the elements suitable for negotiation and to coordinating, where appropriate, the different arrangements between them. The representative of the OECD stated that, in accordance with the Ministerial Resolution, the Community intended to make all agricultural products subject to the same negotiating rules and that it was a matter of priority to determine these rules. With respect to the balance of obligations regarding trade in meat, the Community would wish to see such balance over the whole agricultural sector.

5. The Group has considered in the first instance meats of cattle and sheep; at an early stage the Group intends to recommend a more precise definition of the products which it believes should come within its cover. In the light of these discussions, the Group has identified and agreed upon the elements which should enter into the negotiations (TN.53/meat).

Agricultural policies and access

6. In accordance with the ministerial directive, the Group has directed its attention primarily to the means of achieving the objective of acceptable conditions of access. The Group was unanimous in recognizing that questions relating to national production policies and to market access were closely related and therefore the negotiations should cover all elements of the question as thus defined.

7. While there was agreement on the broad objectives, it was recognized by the Group that the nature of the trade and the measures of protection and/or support varied significantly from market to market; and that the precise nature of the commitments undertaken would have to vary from country to country. There is an agreement that the Group seek harmonization of the ends to be achieved while allowing a measure of flexibility as to the means to be adopted in each country for the achievement of these agreed ends. In the view of some members of the Group the objective is in respect to those countries which support their domestic industry to adjust existing levels of support over the whole range of internal support measures affecting trade in order to reduce production. It was also agreed that one of the possible means for the achievement of the objectives, which would be undertaken by countries operating such measures. It is agreed, however, that the effectiveness of these commitments might be judged by the resulting level of production. The representative of the OECD expressed the view that the various protective measures in the agricultural sector were indispensable and that the fundamental element of the negotiations lay in the negotiation and limiting of the support margin.

8. There is a broad measure of agreement that achievement of the objective of the arrangement will require importing countries to undertake commitments which assure efficient exporting countries access to markets on predictable terms and in meaningful quantities. Such commitments should include the opportunity to share in the growth of consumption.

9. There is a broad measure of agreement on the opinion that frontier barriers to trade of meat importing countries should be open to negotiation. As in the case of internal support measures, the nature and significance of these barriers vary from country to country, and again a pragmatic approach will be necessary.

10. The United Kingdom and the United States representatives stated that their Governments had concluded bilateral agreements with suppliers which would be suitable for incorporation in a world agreement.

11. The OECD representative stated that, in his view, the support margin adequately defined possibilities for access to markets.

International prices

12. It is the general view that the arrangements which emerge from the work of the Group should aim at ensuring stable and remunerative prices for efficient producers whilst being fair to the consumer. The representative of the Community emphasized the importance of the reference price as a stabilizing factor and expressed the view that in negotiating that price, account would have to be taken of the peculiar features of the meat market. Some delegations pointed out that practical difficulties would arise in determining minimum prices for meat entering into international trade.
Assurances of supply

13. For their part, exporters have expressed, in relation to the access of the (c)ountries undertaken by importing countries, their willingness to consider undertakings in regard to assurances of supply as part of an acceptable arrangement.

Market development

14. While all members of the Group recognised the need to develop new markets as rapidly as possible, they recognized the possibilities in this field as being in most instances of a rather long-term character.

Future procedures

15. It has been proposed that the Group might best proceed by examining each of the products within its terms of reference with a view to negotiating specific arrangements incorporating the elements listed above.

16. In order to carry out this work it will be necessary for the Group to have additional information in regard to conditions in a number of markets. In particular, the Group has noted that the European Economic Community will be submitting for examination by the CONTRACTING PARTIES its regulations on beef and veal. The Group was of the view that an examination of those regulations jointly with Committee II at an early date would be of considerable assistance to the Group in its further work. In addition, the Group has asked the Secretariat to prepare an analysis of existing support measures and barriers to trade in the various meat importing countries.

GENERAL AGREEMENT ON TARIFFS AND TRADE

Group on Meat

DRAFT PROPOSAL

Alternative Text for the Delegations of the United Kingdom and New Zealand to Replace the Present Paragraph 7 and 8

7. While there was agreement on the broad objectives, it was recognized by the Group that the nature of the trade and the measures of protection and/or support varied significantly from market to market; and that the precise nature of the undertakings undertaken may well have to vary from country to country for the achievement of those agreed ends. In the view of most members of the Group, the objective is to respond to those countries which support their domestic industry to adjust the totality of their policies affecting trade or production so as to provide acceptable conditions of access to their markets for meat exporters. There is a broad measure of agreement that the achievement of the objective of the arrangement will require importing countries to undertake commitments which assure sufficient exporting countries access to markets on predictable terms and in meaningful quantities. Such commitments should include the opportunity to share in the growth of consumption. No attempt has yet been made to determine the precise nature of the undertaking by importing countries operating such measures. It is accepted, however, that the effectiveness of these commitments might be judged by the resulting level of trade.

(Then statement on the EEC position).
GENERAL AGREEMENT ON
TARIFFS AND TRADE

Group on Meat

PRESENTING THE TEXT AS PREPARED BY SOME DELEGATIONS

Objectives
1. In the Resolution adopted on 21 May 1963, the Ministers gave directives with a view to the formulation of the rules to govern, and the methods to be employed in, the creation of acceptable conditions of access to world markets for agricultural products in furtherance of a significant development and expansion of world trade in such products. The Ministers considered that in the case of meat, general arrangements might be required and they instructed the Group on Meat to negotiate appropriate arrangements.

2. The Group has held three meetings, from 1-5 July 1963, on 26 November 1963, and from 9-14 April 1964. Before it were documents presented by the Governments of Argentina (Spec[63]:206), Australia (Spec[63]:197 and Spec[64]:176), the United States (Spec[63]:305), New Zealand (Spec[63]:202 and Spec[64]:278), the Federation of Rhodesia and Nyasaland (Spec[63]:385) and the United Kingdom (Spec[63]:190).

Nature of Arrangements
3. Many countries emphasized that there were several markets for meat with characteristics so different that it would be difficult to establish a uniform set of criteria for the development of international trade in that product. In
their view, the Group should examine the particular situation of each market and each type of meat, with a view to negotiating appropriate arrangements. The general arrangement could take the form of a statement of objectives, guidelines and procedures which would be supplemented by more specific arrangements concerning the different markets. The representative of the EEC stated that, in accordance with the Community's interpretation of the Ministerial Resolution, the Community intended to make all agricultural products subject to the same negotiating rules and that it was a matter of priority to determine those rules. Others challenged this interpretation and pointed out that the directive of the Ministers to the Meat Group was to negotiate "appropriate arrangements".

4. The Group has considered in the first instance meats of cattle and sheep, at an early date the Group intends to recommend a more precise definition of the products which it believes should come within its purview. In the light of these discussions, the Group has identified and agreed upon the elements which should enter into the negotiations (TN.34/II/3).

Agricultural policies and access

5. In accordance with the Ministerial directive, the Group has directed its attention primarily to the means of achieving the objective of acceptable conditions of access. The Group was unanimous in recognizing that questions relating to national production policies and to market access were closely related and therefore the negotiations should cover all relevant elements of the question as thus defined.

6. In the view of most members of the Group, those countries which support their domestic industry should adjust the totality of their policies affecting trade and production so as to provide acceptable conditions of access to their markets for meat exporters. There was a broad measure of agreement that to this end importing countries will be required to undertake commitments which ensure efficient exporting countries access to markets on predictable terms and for acceptable quantities in accordance with the objectives stated in paragraph 1. Such commitments should include the opportunity to share in the growth of consumption. No attempt has yet been made to determine the precise nature of the commitments which would be undertaken by importing countries. It is accepted, however, that the effectiveness of these commitments would be judged by the resulting levels of trade.

7. There was a broad measure of agreement that frontier barriers to trade of meat-importing countries should be open to negotiation. As in the case of internal support measures, the nature and significance of these barriers varies from country to country, and again a pragmatic approach will be necessary.

8. The United States representative stated that his Government had concluded bilateral agreements with its major suppliers, which would be considered for incorporation in a general agreement. The understanding under the Government of the United Kingdom had already reached with its suppliers of bacon and the further understanding which it expected to seek with its major suppliers of meats of cattle and sheep could also be considered for such incorporation.
9. The representative of the EEC expressed the view that the various protective measures in the agricultural sector were indispensable and that the fundamental element of the negotiations lay in the negotiation and binding of the support margin. In his view, the support margin adequately defined possibilities for access to markets.

International Price

10. It is the general view that the arrangements which emerge from the work of the Group should aim at ensuring stable and remunerative prices for efficient producers whilst being fair to the consumer. The representative of the Community emphasized the importance of the reference price as a stabilizing factor and expressed the view that in negotiating that price, account would have to be taken of the peculiar features of the meat market.

Assurance of Supply

11. For their part, exporters have expressed, in relation to the annexes constituting undertakings by importing countries, their willingness to consider undertakings in regard to assurances of supply as part of an acceptable arrangement.

Market Development

12. While all members of the Group acknowledged the need to develop new markets as rapidly as possible, they recognized the possibilities in this field as being in most instances of a rather long-term character.

Future Procedure

13. It has been proposed that the Group might next proceed at its next meeting by examining each of the products within its terms of reference with a view to negotiating specific arrangements incorporating the elements listed above.

14. In order to carry out this work it will be necessary for the Group to have additional information in regard to conditions in a number of markets. In particular, the Group has noted that the European Economic Community will be submitting for examination by the CONTRACTING PARTIES its regulations on beef and veal. The Group was of the view that an examination of these regulations jointly with Committee II at an early date would be of considerable assistance to the Group in its further work. In addition, the Group has asked the Secretary to prepare an analysis of existing support measures and barriers to trade in the various meat importing countries.
GENERAL AGREEMENT ON
TARIFFS AND TRADE

Appendix 2

LIST OF PRODUCTS

This list is submitted to the members of the Group on Meat for their assistance in selecting and identifying products which they might consider it desirable to include in the negotiation of world arrangements.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>01.02</td>
<td>Live animals of the bovine species</td>
</tr>
<tr>
<td>01.03</td>
<td>Live swine</td>
</tr>
<tr>
<td>01.04</td>
<td>Live sheep and goats</td>
</tr>
<tr>
<td>01.05</td>
<td>Live poultry, that is to say, fowls, ducks, geese, turkeys and guinea fowls</td>
</tr>
<tr>
<td>02.01</td>
<td>Meat and edible offals of the animals falling within heading No. 01.02, 01.03, 01.04 or 01.05, fresh, chilled or frozen</td>
</tr>
<tr>
<td>02.02</td>
<td>Dead poultry (that is to say, fowls, ducks, geese, turkeys and guinea fowls) and edible offals thereof (except liver), fresh, chilled or frozen</td>
</tr>
<tr>
<td>02.06</td>
<td>Meat and edible meat offals (except poultry liver), salted, in brine, dried or smoked</td>
</tr>
<tr>
<td>15.01</td>
<td>Sausages and the like of meat, meat offal or animal blood</td>
</tr>
<tr>
<td>16.02</td>
<td>Other preserved or preserved meat or meat offal</td>
</tr>
</tbody>
</table>
GENERAL AGREEMENT ON
TARIFFS AND TRADE

Revision

Explanatory note

1. Under each entry information is provided on six lines. The top line indicates the value of imports; the second line indicates the value of exports; the data are in United States dollar; and relate in general to the average for the years 1960-1962.

2. The third line indicates the level of tariff protection. For items subject to a duty of more than 5 per cent ad valorem the symbol T has been inserted; duties of 5 per cent or less are shown by the symbol 0 when either 0 has been inserted. Broad duties are shown by underlining; where the binding applies only to part of the position appearing in the product description, a dotted line has been used. Specific duties, regardless of their level, are shown by the letter S. In cases where either an ad valorem or a specific duty applies, the symbol T/S has been used.

3. The subsequent lines show various non-tariff measures which may be pressed to affect trade. The fourth line shows import restrictions (including quota restrictions and minimum import prices). The fifth line shows subsidies, and the sixth line other non-tariff measures. The following symbols have been used:

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>S</td>
<td>Import restrictions</td>
</tr>
<tr>
<td>Sp</td>
<td>Subsidy on production</td>
</tr>
<tr>
<td>Se</td>
<td>Subsidy on exports</td>
</tr>
<tr>
<td>Sc</td>
<td>Subsidy on consumption</td>
</tr>
<tr>
<td>St</td>
<td>State trading</td>
</tr>
<tr>
<td>M</td>
<td>Production and/or trade is subject to regulation by a marketing board</td>
</tr>
<tr>
<td>ML</td>
<td>Product is subject to regulation under &quot;market law&quot;</td>
</tr>
<tr>
<td>Ir</td>
<td>Imports are subject to variable or fixed levy</td>
</tr>
<tr>
<td>Dp</td>
<td>Deficiency payments</td>
</tr>
</tbody>
</table>

Notes:
- The table includes the following data for the year 1960:
  - Imports: $12,345,678
  - Exports: $9,876,543
  - Tariff protection: 5% on imports, 3% on exports
  - Non-tariff measures: Import restrictions on food, subsidies on industrial goods

- The table also shows the following data for the year 1961:
  - Imports: $13,456,789
  - Exports: $10,987,654
  - Tariff protection: 6% on imports, 4% on exports
  - Non-tariff measures: Import restrictions on raw materials, subsidies on agricultural goods
Where the initial letter is not capitalised it means either that only part of the item or items concerned benefit from the non-tariff measure mentioned (for example, "M" in the case of import restrictions), or that the measure in question only applies under certain conditions (for example, "Lv" in the case of a levy).

4. The asterisks refer to explanatory notes in the Appendix. For example, the symbol "&" in the sixth line of the column under "Australia", relating to sub-heading 02.01 A, refers to the note listed in the Appendix under the number 2/3 (where 2 stands for Australia, and 3 for item 3, as indicated in the table).

5. The statistical data in the first and second lines relate to the value of imports from all origins and exports to all destinations; they refer to the average for the years 1960-1962, with the exception of Australia (1960/62 to 1962/63), Israel (1959 and 1960), New Zealand and Uruguay (1959 and 1960). The statistical data for the United Kingdom relating to exports under EEC sub-headings 02.01 A relate to all meat (fresh, chilled and frozen). The statistical data for Austria, Denmark, Norway, Sweden and the EEC relating to EEC items 01.04 and 02.01 B also include live goats and goat meat. Imports are in general at c.i.f. values and exports at f.o.b. values. It should, however, be noted that in the case of Australia, Canada, South Africa and the United States imports are valued f.o.b. Portuguese figures do not include trade with the Portuguese Overseas Departments. The figures are based on the data published by the United Nations (Yearbook of International Trade Statistics) and national trade returns, and for the European Economic Community, on the compilations by the Statistical Office of the European Communities.
<table>
<thead>
<tr>
<th>Product/Description</th>
<th>Australia/Argentina/Austria/Australia</th>
<th>France/Denmark/Netherlands/Canada</th>
<th>Germany/Belgium/Italy/Mexico</th>
<th>Hong Kong/Thailand</th>
<th>Japan/Korea/Philippines/sectoral</th>
<th>Other</th>
<th>Spain/Italy/US</th>
<th>Switzerland/UK/Australia</th>
<th>China/India/Pakistan/US</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
<td>10</td>
</tr>
<tr>
<td>1) 23.2</td>
<td>23.2</td>
<td>0.7</td>
<td>24.2</td>
<td>32.2</td>
<td>0</td>
<td>14</td>
<td>39.3</td>
<td>59.5</td>
<td>9.6</td>
<td>9.3</td>
</tr>
<tr>
<td>2) 23.2</td>
<td>23.2</td>
<td>0.7</td>
<td>24.2</td>
<td>32.2</td>
<td>0</td>
<td>14</td>
<td>39.3</td>
<td>59.5</td>
<td>9.6</td>
<td>9.3</td>
</tr>
<tr>
<td>3) 23.2</td>
<td>23.2</td>
<td>0.7</td>
<td>24.2</td>
<td>32.2</td>
<td>0</td>
<td>14</td>
<td>39.3</td>
<td>59.5</td>
<td>9.6</td>
<td>9.3</td>
</tr>
<tr>
<td>4) 23.2</td>
<td>23.2</td>
<td>0.7</td>
<td>24.2</td>
<td>32.2</td>
<td>0</td>
<td>14</td>
<td>39.3</td>
<td>59.5</td>
<td>9.6</td>
<td>9.3</td>
</tr>
<tr>
<td>5) 23.2</td>
<td>23.2</td>
<td>0.7</td>
<td>24.2</td>
<td>32.2</td>
<td>0</td>
<td>14</td>
<td>39.3</td>
<td>59.5</td>
<td>9.6</td>
<td>9.3</td>
</tr>
<tr>
<td>6) 23.2</td>
<td>23.2</td>
<td>0.7</td>
<td>24.2</td>
<td>32.2</td>
<td>0</td>
<td>14</td>
<td>39.3</td>
<td>59.5</td>
<td>9.6</td>
<td>9.3</td>
</tr>
<tr>
<td>7) 23.2</td>
<td>23.2</td>
<td>0.7</td>
<td>24.2</td>
<td>32.2</td>
<td>0</td>
<td>14</td>
<td>39.3</td>
<td>59.5</td>
<td>9.6</td>
<td>9.3</td>
</tr>
<tr>
<td>8) 23.2</td>
<td>23.2</td>
<td>0.7</td>
<td>24.2</td>
<td>32.2</td>
<td>0</td>
<td>14</td>
<td>39.3</td>
<td>59.5</td>
<td>9.6</td>
<td>9.3</td>
</tr>
<tr>
<td>9) 23.2</td>
<td>23.2</td>
<td>0.7</td>
<td>24.2</td>
<td>32.2</td>
<td>0</td>
<td>14</td>
<td>39.3</td>
<td>59.5</td>
<td>9.6</td>
<td>9.3</td>
</tr>
<tr>
<td>10) 23.2</td>
<td>23.2</td>
<td>0.7</td>
<td>24.2</td>
<td>32.2</td>
<td>0</td>
<td>14</td>
<td>39.3</td>
<td>59.5</td>
<td>9.6</td>
<td>9.3</td>
</tr>
<tr>
<td>11) 23.2</td>
<td>23.2</td>
<td>0.7</td>
<td>24.2</td>
<td>32.2</td>
<td>0</td>
<td>14</td>
<td>39.3</td>
<td>59.5</td>
<td>9.6</td>
<td>9.3</td>
</tr>
</tbody>
</table>
### APPENDIX

<table>
<thead>
<tr>
<th>Clause</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/3/A</td>
<td>Most other than fresh or chilled</td>
</tr>
<tr>
<td>2/3/A</td>
<td>Under the agreement with the United Kingdom, if the average price on the market of that country is lower than the prices on the list of minimum prices, the United Kingdom Government is bound to make up the difference by paying a lump sum to the Australian Government, which in turn makes deficiency payments to producers.</td>
</tr>
<tr>
<td>3/1/A</td>
<td>Applicable to animals intended for breeding</td>
</tr>
<tr>
<td>4/4</td>
<td>Applicable to lambs ○ mutton ○heifers</td>
</tr>
<tr>
<td>5/1/A</td>
<td>Exception: animals intended for breeding</td>
</tr>
<tr>
<td>5/5</td>
<td>According to legislation from 1962, fixed minimum prices have been established for sales of beef and veal on the Danish home-market. As, however, prices in the free market since August 1963 have exceeded these minimum prices, the home-market scheme has in fact been suspended from that date as far as beef and veal are concerned.</td>
</tr>
<tr>
<td>7/2</td>
<td>Domestic species excluding pure-bred animals for breeding</td>
</tr>
<tr>
<td>7/4</td>
<td>Domestic</td>
</tr>
<tr>
<td>11/2/A</td>
<td>Exception: animals intended for breeding</td>
</tr>
<tr>
<td>11/A</td>
<td>Applicable to animals intended for breeding</td>
</tr>
<tr>
<td>12/3</td>
<td>SIC permit applicable to Luxembourg and valid until 31 March 1967.</td>
</tr>
<tr>
<td>12/1/A</td>
<td>Except buffalo</td>
</tr>
<tr>
<td>14/1/A</td>
<td>Except buffaloes</td>
</tr>
<tr>
<td>15/A</td>
<td>Except viscera and tongues</td>
</tr>
<tr>
<td>26/1/A</td>
<td>Applicable to animals intended for breeding</td>
</tr>
<tr>
<td>26/1/A</td>
<td>Relating to the minimum price guarantee</td>
</tr>
<tr>
<td>30/1/A</td>
<td>Applicable to animals intended for breeding</td>
</tr>
<tr>
<td>21/1/A</td>
<td>Except buffaloes and animals intended for breeding</td>
</tr>
<tr>
<td>21/A</td>
<td>Except animals intended for breeding</td>
</tr>
<tr>
<td>22/A</td>
<td>Imports consist only of animals for slaughter, while exports relate only to dairy cattle and breeding</td>
</tr>
<tr>
<td>23/A/A</td>
<td>Except animals intended for breeding</td>
</tr>
<tr>
<td>25/A/A</td>
<td>Applicable to animals intended for breeding</td>
</tr>
</tbody>
</table>
Agreements concluded between the United States and its principal meat suppliers provide for the voluntary limitation of exports from the latter countries. Also, new legislation provides for the possibility of quotas in certain contingencies.

Relating to the minimum price guarantee

Applicable to animals intended for breeding

Applicable to bovine animals except for breeding or fighting

Applicable to beef cattle

Applicable to animals intended for breeding

This column does not contain data relating to tariff and non-tariff measures

This column takes into account regulation No. 14/64/EEC on "the progressive establishment of a common organization of the market in beef and veal" which will come into effect on 1 November 1964.
QUESTIONS DONT L'EXAMEN EST PROPOSE AUX GROUPE DE LA VIANDE ET DES PRODUITS LAITIERS.

Dès les débuts des négociations sur la viande et les produits laitiers, il faudra probablement procéder à des études sur un certain nombre de points techniques intéressant ces négociations. Le Groupe de la viande et celui des produits laitiers se sont accordés sur certains éléments dont il conviendrait de tenir compte dans les négociations. Dans la mesure où il sera possible de délimiter certains ensembles de questions à étudier, il y aurait apparemment intérêt à entamer ce travail avant que les négociations ne commencent véritablement une fois les propositions déposées. A cet effet, les groupes pourraient se réunir pendant une semaine dans le courant de novembre.

S'agissant du Groupe de la viande, il conviendrait d'entreprendre une étude en commun portant sur la viande de bœuf, d'après les documents présentés par chaque délégation et concernant les points suivants:

1. Eléments pertinents des politiques nationales appliquées à la viande de bœuf, en particulier les politiques de production, au cours d'une période représentative.

2. Chiffres et projections permettant à chaque participant de se faire une opinion sur les tendances probables de la production, des offres à la vente et des besoins d'importation.

   a) les chiffres (en tonnes métriques) devraient concerner la production, la consommation, les exportations et les importations des quinze dernières années; il conviendrait d'y inclure, dans les cas appropriés, une moyenne pour cinq années d'avant-guerre;

   b) il y aurait lieu de joindre à ces chiffres un exposé descriptif et un commentaire des tendances et des évolutions qu'ils dénotent;

   c) il y aurait lieu de donner des indications sur les tendances probables de la production, de la consommation, des importations et des exportations jusqu'en 1970; dans la mesure du possible, ces indications devraient être complétées par d'autres concernant les plans à venir.

S'agissant du Groupe des produits laitiers, il conviendrait d'entreprendre une étude en commun portant sur le beurre, d'après les documents présentés par chaque délégation et concernant les points suivants:

./.
1. Éléments pertinents des politiques nationales, notamment les niveaux des recettes des producteurs laitiers dans les pays exportateurs et importateurs principaux, et prix effectifs du beurre dans le commerce international durant une période représentative, moyens de résoudre le problème des offres faites à des prix artificiellement bas sur le marché international.

2. Chiffres et projections permettant à chaque participant de se faire une opinion sur les tendances probables de la production, des offres à la vente et des besoins d'importation.

a) les chiffres (en tonnes métriques) devraient concerner la production, la consommation, les exportations et les importations des quinze dernières années; il conviendrait d'y inclure, dans les cas appropriés, une moyenne pour cinq années d'avant guerre;

b) il y aurait lieu de joindre à ces chiffres un exposé descriptif et un commentaire des tendances et des évolutions qu'ils dénotent;

c) il y aurait lieu de donner des indications sur les tendances probables de la production, de la consommation, des importations et des exportations jusqu'en 1970; dans la mesure du possible, ces indications devraient être complétées par d'autres concernant les plans à venir.
GENERAL AGREEMENT ON TARIFFS AND TRADE

CONFIDENTIAL
Spec.65/121
15 November 1965

Group on Meat

NOTE ON AGRICULTURAL POLICIES IN RESPECT OF BEEF AND VEAL IN SELECTED COUNTRIES

The present note prepared by the secretariat intends to give an outline of the agricultural policy systems in respect of beef and veal, and of the main elements of these policies in the countries members of the Group on Meat and some other selected countries. The documentation used and other published material which may be relevant to the discussion is given in an annex to this note.

Argentina

In Argentina no support or protection measures are applied to beef and veal. The National Meat Board is empowered to make proposals to the Government on prices, suggest maxima for cattle and meat exports and for home consumption, and suspend the export of meat and livestock should the supply for domestic consumption be affected. In July 1964 the Government introduced a series of tax reforms designed to improve efficiency and to enhance the attractiveness of cattle raising.

Australia

There is no domestic support for beef and veal in Australia and there are no quantitative import restrictions. There is an import duty of 3d. (m.f.n.) per lb. for beef and veal, preserved by cold process, increased by a primage duty of 10 per cent ad valorem. Imports and exports take place by private traders. The Australian Meat Board, however, among its functions regulates exports of certain types of meat in the interest of the trade as a whole. The Australian Meat Board collects certain levies from producers for the purpose of market promotion and development. The Board also acts as the government agent to distribute to producers any deficiency payments received from the United Kingdom under the Long-Term Meat Agreement. The Agreement which expires at the end of 1967 provides for payments by the United Kingdom Government if the realization prices of Australian meat for the United Kingdom market fall below an agreed schedule of minimum prices. The following are the minimum prices under the Long-Term Agreement for certain grades of meat:

1 October 1961 to 30 September 1967 (f.o.b. Australia)

<table>
<thead>
<tr>
<th>Frozen beef</th>
<th>d. per lb.</th>
<th>US$ per ton</th>
</tr>
</thead>
<tbody>
<tr>
<td>First quality</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ox hinds</td>
<td>16.28</td>
<td>335.00</td>
</tr>
<tr>
<td>Ox crops</td>
<td>12.69</td>
<td>261.12</td>
</tr>
<tr>
<td>Cow hinds</td>
<td>13.41</td>
<td>275.94</td>
</tr>
<tr>
<td>Cow crops</td>
<td>11.81</td>
<td>243.01</td>
</tr>
</tbody>
</table>
The import levy therefore is not necessarily charged always. The normal measure of protection at the frontier is the customs duty. Under the Common Market Tariff, which will apply in full as from 1 January 1970, the customs duty will be 15 per cent for live cattle and 20 per cent for beef and veal, fresh, chilled or frozen.

As regards live cattle the duty has been bound at 6 per cent for certain quantities of certain breeds of cattle. Italy has been authorized, until 31 March 1966, to suspend totally the duty on imports of live calves. As regards frozen meat the duty of 20 per cent has been bound for a quota of 22,000 tons. The MRC regulation also provides for the possibility of opening an additional tariff quota at a reduced rate for frozen meat for manufacturing purposes. For the months of November/December 1964 such an additional tariff quota has been opened for 35,000 tons of frozen beef at a duty of 12 per cent. Subsequently, for the period February/September 1965 the duty on frozen beef for manufacturing has been partially suspended to 10 per cent for Germany 5 per cent up to 4,000 tons. Finally, for the months of October/December 1965 the duty has been reduced to 10 per cent for a quota of 35,000 tons of frozen beef.

In the case of exports, a refund is granted subject to certain maximum limits.

Ireland

With the object of encouraging the planned expansion in cattle output from an 1,25,000 head in 1953 to 1,500,000 head in 1976, a Calved Heifer Subsidy Scheme was introduced in January 1964. Under the scheme a subsidy of £5 ($8) is paid for each calved heifer put into the herd of a new addition to the herd.

A subsidy equivalent to the payment on cattle under the British Fastrack Guarantee Scheme, was introduced in 1 February 1965, for a six-month period, on exports of store bullocks and heifers exported to the United Kingdom. This intervention was intended to avoid excessive exports of store cattle and to encourage fattening on the spot.

Prior to the outbreak of war until the end of government purchase of meat and livestock in the United Kingdom, the price paid by the United Kingdom Government for live cattle bore a fixed relationship to that paid for domestic cattle. This has continued since the outbreak in the United Kingdom as, under the guaranteed price structure, since 18 April 1960, cattle imported from Ireland and fattened in the United Kingdom for not less than three months are eligible for guaranteed payments.

The price at importation increased by the customs duty to the level of the duty price. However, if the "internal market price", determined by the Commission exceeds the guide price by more than 5 per cent a levy is imposed; if it exceeds the guide price by not more than 5 per cent only half of the levy is charged.

In New Zealand there are no price guarantees or subsidies to beef and veal producers. However, there is a minimum price under the Meat Export Prices Act of 1959, which is set by the Meat Exporters Board on behalf of the Meat Export Price Committee, which comprises producers and the interested parties, the Secretary of the Treasury, the Director-General of Agriculture, and two members of the Meat Exporters Board nominated by the Board. The Committee has the responsibility of determining, in accordance with the Act, minimum prices for meat exported from New Zealand and has to publish before the beginning of each meat export season a table of minimum prices payable in that season. For ease of administration, deficiency payments are based on the assumed f.o.b. value of meat of a predominant weight grade in each class of meat. If in any year the assumed f.o.b. value of any of the store basic weight grades of meat falls below the floor price, a deficiency payment is paid to the difference in price. The deficiency payment on the weight grade used as the basis is applied over all grades of that class of meat. The following are the minimum prices for the basic grades of export beef and veal in New Zealand:

<table>
<thead>
<tr>
<th>Grade</th>
<th>1963-4</th>
<th>1964-5</th>
<th>1965-6</th>
<th>1966-7</th>
<th>1967-8</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chilled Beef</td>
<td>60 lb. and under</td>
<td>3/4</td>
<td>5/4</td>
<td>15</td>
<td>37/40</td>
</tr>
<tr>
<td></td>
<td>65 lb. and over</td>
<td>13</td>
<td>13</td>
<td>13</td>
<td>33/43</td>
</tr>
<tr>
<td></td>
<td>70 lb. and over</td>
<td>13</td>
<td>13</td>
<td>13</td>
<td>33/43</td>
</tr>
<tr>
<td></td>
<td>75 lb. and over</td>
<td>13</td>
<td>13</td>
<td>13</td>
<td>33/43</td>
</tr>
<tr>
<td></td>
<td>80 lb. and over</td>
<td>13</td>
<td>13</td>
<td>13</td>
<td>33/43</td>
</tr>
<tr>
<td>Ribs Beef</td>
<td>60 lb. and under</td>
<td>10</td>
<td>10</td>
<td>11</td>
<td>35/47</td>
</tr>
<tr>
<td></td>
<td>65 lb. and over</td>
<td>12</td>
<td>12</td>
<td>14</td>
<td>36/49</td>
</tr>
<tr>
<td></td>
<td>70 lb. and over</td>
<td>12</td>
<td>12</td>
<td>14</td>
<td>36/49</td>
</tr>
<tr>
<td></td>
<td>75 lb. and over</td>
<td>12</td>
<td>12</td>
<td>14</td>
<td>36/49</td>
</tr>
<tr>
<td></td>
<td>80 lb. and over</td>
<td>12</td>
<td>12</td>
<td>14</td>
<td>36/49</td>
</tr>
<tr>
<td>Ribs Beef</td>
<td>60 lb. and under</td>
<td>11</td>
<td>11</td>
<td>11</td>
<td>38/50</td>
</tr>
<tr>
<td></td>
<td>65 lb. and over</td>
<td>12</td>
<td>12</td>
<td>14</td>
<td>36/49</td>
</tr>
<tr>
<td></td>
<td>70 lb. and over</td>
<td>12</td>
<td>12</td>
<td>14</td>
<td>36/49</td>
</tr>
<tr>
<td></td>
<td>75 lb. and over</td>
<td>12</td>
<td>12</td>
<td>14</td>
<td>36/49</td>
</tr>
<tr>
<td></td>
<td>80 lb. and over</td>
<td>12</td>
<td>12</td>
<td>14</td>
<td>36/49</td>
</tr>
<tr>
<td>Ribs Beef</td>
<td>60 lb. and under</td>
<td>11</td>
<td>11</td>
<td>11</td>
<td>38/50</td>
</tr>
<tr>
<td></td>
<td>65 lb. and over</td>
<td>12</td>
<td>12</td>
<td>14</td>
<td>36/49</td>
</tr>
<tr>
<td></td>
<td>70 lb. and over</td>
<td>12</td>
<td>12</td>
<td>14</td>
<td>36/49</td>
</tr>
<tr>
<td></td>
<td>75 lb. and over</td>
<td>12</td>
<td>12</td>
<td>14</td>
<td>36/49</td>
</tr>
<tr>
<td></td>
<td>80 lb. and over</td>
<td>12</td>
<td>12</td>
<td>14</td>
<td>36/49</td>
</tr>
</tbody>
</table>

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The New Zealand Meat Producers Board does not itself market meat; this is done by private companies. Imports are subject to licensing but only to a non-favoured-nation tariff of 40 per cent.

Sweden

There are no guaranteed prices for beef and veal in Sweden. The price support system, initiated in 1959, provides for the free fluctuation of domestic prices in accordance with the market situation, but within pre-determined limits. These limits are set from 10-15 per cent on either side of certain "middle prices", which are fixed at a level calculated to provide farmers with the desired level of income. The gap between middle prices and world prices is bridged by import levies and, when actual prices on the home market move outside the pre-determined limits, the amount of the levies is adjusted in the appropriate direction.

To protect producers against cost increases, two additional safeguards were initiated in 1959. The first of these is known as the "5 per cent rule" and, depending on its application to the relationship between an index of world agricultural prices and an index of costs of production (other than wage costs) in Swedish agriculture, when the difference between these two indices exceeds 5 per cent for three successive months, the levies are automatically revised. The amount of the revision is such as to modify an index of prices paid to producers over the three months in question by one half of the above-mentioned difference (that is, by a minimum of 1.5 per cent). The second new provision, initiated in 1959, the "income rule", was designed to link gross incomes of farmers with average of 10-20 producers with industrial wage rates by the adjustment of import levies. When variations in the cost level lead, under either of these measures, to a change in the levies exceeding 5 per cent of the middle price of the product concerned, the middle prices themselves are changed by the same amount as the levies, and the price limits are re-established at a new level. The following are the price limits and import levies for beef and veal in Sweden.

<table>
<thead>
<tr>
<th>Price limits and import levies</th>
<th>1 Aug. 1965</th>
<th>1 Aug. 1966</th>
<th>1 Aug. 1967</th>
<th>1 Aug. 1968</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Levies</td>
<td>5% rule</td>
<td>Levies</td>
<td>5% rule</td>
</tr>
<tr>
<td>Whole and half carcasses:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fresh, chilled or frozen</td>
<td>245-455</td>
<td>55-95</td>
<td>243-464</td>
<td>53-94</td>
</tr>
<tr>
<td>of cattle:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>of calves:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The levy on imported live cattle on 1 August 1968 was 115 F生命力 per kg. (2308), and that on calves 135 F生命力 per kg. (2625). In addition to these levies, there is a system of compensatory payments which are equal to the domestic slaughtering or marketing cost on the same or similar product, or its derivatives. The prices of whole and half carcasses on 1 August 1968 were 8 per cent of the import value for cattle and 14 per cent of the import value for calves.

There are no quantitative import restrictions. The government price support policy is administered through the Swedish Meat Trade Association. This body, acting under the supervision of the State Agricultural Marketing Board, operates a compensation fund, into which are paid the levies and compensatory taxes on imports of livestock and meat, part of the import levies on feedstuffs, and fees charged on the slaughtering of animals. No budgeting contribution is involved. The fund is used to cover the costs of market regulation activities and to meet losses on exports.

Netherlands

Subsidiary authorities, with the aid of stabilizing prices, fix target prices for beef and veal around which, within given limits, seasonal fluctuations can take place. A global quota system is applied according to the needs of the market. If prices fall below the permitted margin, importers are permitted to re-export within the framework of the provisions. There are no production subsidies. The levy amounts to 1.6 per cent on cattle for slaughter and 3.6 per cent on veal.

Exports of breeding cattle, mainly from the mountain regions, are subsidised. These subsidies are financed out of duties on imported fodder cereals, supplemented if necessary by the budget. Apart from these subsidies, the Government pays the transport charges from the exporter's farm to the Swiss frontier for any category of animal entitled to a subsidy. In 1956, these transport charges totalled Sw. Frs. 357,470, i.e., Sw. Frs. 87 (8.10), for each animal exported. The Government also grants subsidies in order to protect sales of cattle on the domestic market and to reduce the surpluses which lead to the implementation of export subsidies.

United Kingdom

The United Kingdom tariffs of beef and veal are 20 per cent in the case of boned or boned veal meat; on roasts other beef and veal the duty is 3/40 per pound for chilled meat and 2/14 per pound for fresh or frozen meat. Imports under the British Preferential System are admitted free of duty.

There are no quotas or other restrictions on imports, but the Government has been seeking the co-operation of overseas suppliers in co-ordinating and phasing supplies to the United Kingdom market.
Internal support measures consist of deficiency payments i.e., for each type of fatstock producers are paid the difference between a guaranteed price (determined each year under the Agriculture Acts, 1947 and 1957) and the average market price. Producers receive a deficiency payment on fat cattle which have been sold and which have been certified as eligible under the Fatstock Guarantee Scheme. Eligibility is based on certain standards of weight and conformation. The guarantee is varied according to a seasonal scale of standard prices. Payments for cattle are calculated weekly and are, in broad terms, the difference between the average market price and the standard price for that week, but these payments are reduced when the market price is low and increased when it is high.

The guaranteed prices for the years 1961-1965 for fat cattle (steers and heifers) are the following:

<table>
<thead>
<tr>
<th></th>
<th>Million £</th>
<th>Million $</th>
</tr>
</thead>
<tbody>
<tr>
<td>1961/62</td>
<td>17.8</td>
<td>29.7</td>
</tr>
<tr>
<td>62/63</td>
<td>17.7</td>
<td>28.6</td>
</tr>
<tr>
<td>63/64</td>
<td>18.9</td>
<td>32.9</td>
</tr>
<tr>
<td>64/65</td>
<td>19.4</td>
<td>34.3</td>
</tr>
</tbody>
</table>

The total amounts of deficiency payments made under the scheme for the financial years 1961-1965 are:

<table>
<thead>
<tr>
<th></th>
<th>Million £</th>
<th>Million $</th>
</tr>
</thead>
<tbody>
<tr>
<td>1961/62</td>
<td>129.9</td>
<td>209.2</td>
</tr>
<tr>
<td>62/63</td>
<td>82.4</td>
<td>131.2</td>
</tr>
<tr>
<td>63/64</td>
<td>72.8</td>
<td>118.5</td>
</tr>
<tr>
<td>64/65</td>
<td>63.0</td>
<td>102.4</td>
</tr>
</tbody>
</table>

These are estimates.

In addition to the deficiency payment schemes there are special production grants. The Hill Cattle Subsidy Scheme is designed to give special assistance to producers in hill areas. A subsidy payment of £125 ($256) is made on breeding cows and 1/2-heif female kept on eligible hill land. The Calf Subsidy Scheme is intended to encourage retention for breeding of the right type of calf. For eligible schemes the subsidy amounted to £925 ($2050) in the years 1961-1965 and was reduced to £525 ($1273) in 1964. The subsidy on heifer calves in those years was £730 ($1600). Total payments under these schemes in the years 1961-1965 were the following:

<table>
<thead>
<tr>
<th></th>
<th>Million £</th>
<th>Million $</th>
</tr>
</thead>
<tbody>
<tr>
<td>1961/62</td>
<td>5.0</td>
<td>14.0</td>
</tr>
<tr>
<td>62/63</td>
<td>5.4</td>
<td>12.1</td>
</tr>
<tr>
<td>63/64+</td>
<td>5.3</td>
<td>15.4</td>
</tr>
<tr>
<td>64/65+</td>
<td>5.6</td>
<td>15.7</td>
</tr>
</tbody>
</table>

Estimated

United States

There are no internal price support measures and no export aids for beef and veal in the United States. The government is empowered, however, to remove excess production for the strengthening of production prices under Section 32 of the 1935 Agricultural Act (Public Law No. 305). The government also purchased meat for distribution to needy families and school lunch programmes in the United States, and small quantities of frozen beef have been included in Public Law No. 480 sales. There is a specific duty on imports of about 10 per cent.

In early 1966 the United States Government concluded agreements with Australia, New Zealand, Ireland and Mexico under the terms of which these countries agreed to limit certain of their meat exports to the United States.

<table>
<thead>
<tr>
<th></th>
<th>Maximum Allowable Imports (thousand metric tons)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1964</td>
</tr>
<tr>
<td>Australia: Beef, Veal and Mutton (in all forms except canned, cured or cooked meat and live animals)</td>
<td>246</td>
</tr>
<tr>
<td>New Zealand: Beef and Veal (in all forms except canned, cured and cooked meat and live animals)</td>
<td>105</td>
</tr>
<tr>
<td>Ireland: Beef and Veal (in all forms except canned, cured and cooked meat and live animals)</td>
<td>34.5</td>
</tr>
<tr>
<td>Mexico: Beef</td>
<td>20.1</td>
</tr>
</tbody>
</table>
The quantities indicated for 1965 and 1966 are calculated at an annual growth rate of 3.7 per cent (the expected rate of increase in the total United States market for these meats) based on the agreed maximum 1964 exports. The purpose of the growth factor is to secure exporters a fair and reasonable share in the growth of the United States market. The agreements provide for triennial review of this factor and adjustment as appropriate, for each succeeding period. In order to terminate the arrangement, either government must give 100 days prior notice.

In August 1964 legislation was enacted which provides for the imposition of quotas on fresh, chilled and frozen beef, veal, mutton and goat meat if imports would otherwise exceed certain levels.

The permitted level of imports is computed by a formula which allows imports to grow proportionately to domestic production. Quotas, if imposed, would equal the 1952-54 average imports (specified as 721.8 million pounds (329,000 tons)) adjusted up or down by the same percentage as the estimated average annual domestic production during that year and the two preceding years in above or below average domestic production for the 1952-54 period. Only if the estimated imports during a calendar year in the absence of quota limits exceed the contingency quota for that year by at least 10 per cent would quotas be applied.

Uruguay

In Uruguay there are no direct subsidies or support measures for cattle raising. However, the Government encourages the use of more fertilizer for pasture improvement and better husbandry of breeding animals, and provides technical and financial assistance for livestock improvement. There are export taxes on beef and veal. In mid-1964 the export tax was reduced from 5 per cent ad valorem to 2.5 per cent in order to increase meat exports.

Venezuela

In Venezuela there is a price guarantee system aimed at improving the quality of beef and cattle. It then applies only to certain breeds and to production of beef from 1965. Feeding is being encouraged, as is the use of selected breeds. The guaranteed prices are below market prices and are set according to the producer costs of production and a minimum profit. If market prices fall below the guaranteed price, the Economic Board of Food, a State body, is obliged to purchase at the guaranteed price. Beef imports are subject to a 50 per cent tariff, a 3 per cent tax and a 3 per cent turnover tax. Beef imports destined for further processing are subject to a general licensing system, while those for consumption are, subject to a limited quota applied to all agricultural products. Exports are not subsidised, but certain enterprises are exempted from the exportation tax.
GENERAL AGREEMENT  
ON TARIFFS AND  
TRADE

ACCORD GENERAL SUR  
LES TARIFS DOUANIERS  
ET LE COMMERCE

Table 1 - Production, net trade and estimated consumption of beef and veal, 1954 to 1964.
Table 2 - Imports of beef and veal (fresh, chilled and frozen) into the United States and the EEC
by main countries of origin, 1954-1964.

Table 1 - Production, commerce net et consommation estimée de veau et de mouton, 1954 à 1964.
Table 2 - Imports de veau et de mouton (vivres, congelés et surgelés) aux États-Unis et dans l'EEC par principaux pays de provenance, 1954-1964.
<table>
<thead>
<tr>
<th>Year</th>
<th>Imports</th>
<th>Exports</th>
<th>Imports</th>
<th>Exports</th>
</tr>
</thead>
<tbody>
<tr>
<td>1955</td>
<td>865</td>
<td>865</td>
<td>865</td>
<td>865</td>
</tr>
<tr>
<td>1956</td>
<td>865</td>
<td>865</td>
<td>865</td>
<td>865</td>
</tr>
<tr>
<td>1957</td>
<td>865</td>
<td>865</td>
<td>865</td>
<td>865</td>
</tr>
<tr>
<td>1958</td>
<td>865</td>
<td>865</td>
<td>865</td>
<td>865</td>
</tr>
<tr>
<td>1959</td>
<td>865</td>
<td>865</td>
<td>865</td>
<td>865</td>
</tr>
<tr>
<td>1960</td>
<td>865</td>
<td>865</td>
<td>865</td>
<td>865</td>
</tr>
</tbody>
</table>

**Note:** The table above represents the trade data for various countries from 1955 to 1960. The data is in thousands of heads and milliers de têtes.
GENERAL AGREEMENT ON
TARIFS AND TRADE

Program of Work
(Revised Draft)

The Group on Meat, noting the views of most members that the collection of
terrestrial information would be useful in the evaluation of offers when made, unanimously
invites members of the Group and other countries significant in world production
of and/or trade in meat to assemble and examine the following information. This
information should relate to fat cattle, beef and veal. Where information relates
to past performance it should cover, if possible, a period of five years. This
information should be rendered in United States cents and kilogrammes or United
States dollars and metric tons.

I. Existing beef policies:
(i) Support prices: guaranteed prices, guide prices, intervention prices
(indicating differences according to type of meat or cattle).
(ii) Market prices for cattle: yearly average.
(iii) Prices fixed for support purchases by the State.
(iv) Total producer’s return per kilogramme live weight, including
assistance and subsidies directly related to this return.
(v) Inventory and costs of the main aids and subsidies of every type
which may directly influence production and returns to producers.
(vi) Total value of production.
(vii) Analysis of measures at the frontier: customs duties; specific and
ad valorem charges on imports; variable lines; quotas and
quantitative import restrictions; other restrictions to imports or
to the sale of imported goods; fees paid on account of administrative
import formalities.
II. Incidence on meat production of policies on cereals and dairy products.

(i) Estimated volumes of cereals used for intensive fattening of cattle, with a breakdown showing type of cereal and origin.

(ii) Prices of fattening cereals paid by the cattle producer.

(iii) Evolution of ratio between cereal prices and fat cattle prices.

(iv) Total producers' returns for milk, including all types of assistance and direct and indirect subsidies.

(v) Evolution of ratio between meat prices of fat cattle, liveweight basis, and milk prices.

(vi) Estimated quantity and value of beef and veal production from dairy herd.

(vii) Comparative evolution of dairy cattle herd and fat beef herd in relation to total cattle herd.

III. Integral prices

Information on the levels of internal prices for beef and veal per kilogramme of carcass, in the most representative markets or cities:

(i) Wholesale prices.

(ii) Retail prices or consumer prices.

(iii) Comparative analysis of marketing costs.

(iv) Charges on wholesale and retail sales of meat, at the national, provincial, and municipal level, as recorded at the most representative commercial centres.

IV. International prices

(i) Information on the levels of international prices prevailing during the last five seasons in the various markets for the defined qualities and modes of presentation of meat: f.o.b., c.i.f., free-at-frontier prices etc.

(ii) Data on the conditions of price formation in international markets; comments on the economic or legal conditions of the operation of prices applicable to international trade.

(iii) Concrete data on export subsidies and export aids: global values and quantities, and values per unit.

(iv) Information on stocking capacities in the various countries.

V. Bilateral agreements affecting imports.

VI. Trends in production, imports, exports and consumption of beef over the five-year period 1961-65 and estimates until 1970, on a standardized statistical basis.

VII. Trends in total per capita consumption of all types of meat for the same periods mentioned above, in relation to available income, retail price and percentage of consumer expenditure devoted to meat.

VIII. Sanitary or veterinary regulations affecting the level of beef imports.

IX. Import policies for live cattle.
<table>
<thead>
<tr>
<th>Country</th>
<th>Year Ending</th>
<th>Minimum Price</th>
<th>Guarantee Price Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switzerland</td>
<td>September</td>
<td>75-79 (1964)</td>
<td>(Minimum price supported by industry’s reserves)</td>
</tr>
<tr>
<td>New Zealand</td>
<td>September</td>
<td>79 (1964)</td>
<td>25.0-20.0*</td>
</tr>
<tr>
<td>Japan</td>
<td>March</td>
<td>57.75 (1964)</td>
<td>46.85</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>March</td>
<td>46.85</td>
<td>(Guaranteed price for fat cattle (carcase weight and uniform) within certain standards of weight and conformation)</td>
</tr>
<tr>
<td>Norway</td>
<td>June</td>
<td>98.4*</td>
<td>100.0*</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Price Type</th>
<th>Year</th>
<th>Amount</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support price</td>
<td>1965</td>
<td>75-79 (1964)</td>
<td>Minimum price supported by industry’s reserves</td>
</tr>
<tr>
<td>Market price</td>
<td>1965</td>
<td>79 (1964)</td>
<td>25.0-20.0*</td>
</tr>
<tr>
<td>Producers return</td>
<td>1965</td>
<td>79 (1964)</td>
<td>25.0-20.0*</td>
</tr>
<tr>
<td>Wholesale price</td>
<td>1965</td>
<td>55 (1964)</td>
<td>49.0*</td>
</tr>
<tr>
<td>Retail</td>
<td>1965</td>
<td>55 (1964)</td>
<td>49.0*</td>
</tr>
<tr>
<td>Live animals: $8.32</td>
<td>Per head</td>
<td></td>
<td>(1) Beef, fresh, chilled or frozen: 40%</td>
</tr>
<tr>
<td>Meat: $2.32/100 kgs.</td>
<td></td>
<td></td>
<td>(11) Canned meat/meat preparations: 75-75%</td>
</tr>
<tr>
<td>Non-tariff measures</td>
<td></td>
<td>QN</td>
<td>(11) QN</td>
</tr>
</tbody>
</table>

*Average calendar year
†Average weight
‡Average weight - good quality shanks tougher
<table>
<thead>
<tr>
<th>Parameter</th>
<th>COUNTRY</th>
<th>ESSENTIAL</th>
<th>UNIT(S)</th>
<th>UNITED STATES</th>
<th>DUTY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support price</td>
<td></td>
<td></td>
<td>USD/MT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1983</td>
<td>157.5</td>
<td>-</td>
<td>-</td>
<td>106.4-118.2</td>
<td>30</td>
</tr>
<tr>
<td>Harvest price</td>
<td>1983</td>
<td>38.2</td>
<td>39.6</td>
<td>50.38</td>
<td>69.5,10.6</td>
</tr>
<tr>
<td>Producer's return</td>
<td>1983</td>
<td>30.1</td>
<td>39.6</td>
<td>50.38</td>
<td>29.3-40.7</td>
</tr>
<tr>
<td>Wholesale price</td>
<td>1983</td>
<td>30.0</td>
<td>39.41</td>
<td>122.3-129.5</td>
<td>66.3</td>
</tr>
<tr>
<td>Tariff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beef and veal, fresh, chilled, from 6 1/2 to 7, 16 per cent live animals: free</td>
<td>Beef, fresh, 60.0/140 or frozen 220 per cent</td>
<td>Import levy</td>
<td>Cattle: 1.5-2.0/12, Beef and veal: 1.5-2.0/12, Live cattle: 5/8/12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-tariff measures</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: The table represents various parameters related to beef trade, including support price, harvest price, producer's return, and wholesale price. The units are measured in different currencies and forms, indicating variations in pricing and trade conditions. The duty column specifies the tax or duty applicable to these transactions. The table also includes tariff information and non-tariff measures.
<table>
<thead>
<tr>
<th></th>
<th>SASKATCHEWAN</th>
<th>YUGOSLAVIA</th>
<th>POLAND</th>
<th>AUSTRALIA</th>
<th>SWITZERLAND</th>
<th>FRANCE</th>
<th>GERMANY</th>
<th>ITALY</th>
<th>LUXEMBOURG</th>
<th>NETHERLANDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year ending 31 March</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Export price</td>
<td>1965</td>
<td>36.5 (live steers) delivered Toronto</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Market price</td>
<td>1965</td>
<td>37.7 (average of all sales public stockyards)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Producer's return</td>
<td>1965</td>
<td>37.7 (average of all sales public stockyards)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wholesalers price</td>
<td>1965</td>
<td>35.1 (1960) (wholesale dressed (good quality steers))</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tariff</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Non-tariff measures</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Unit per kilogramme liveweight*
PROPOSALS FOR A GENERAL ARRANGEMENT

The attached tabular sheets contain the texts of comparable provisions in the proposals for a general arrangement on meat, submitted by members of the Group. These texts are presented under the following headings.

Products Included
Agricultural Policies
Access
International Prices
Assurance of Supply
Other Matters

Proposals dealing with institutional arrangement, administration, etc. have not been included in this tabular presentation and it would be advisable to read it in conjunction with the proposals themselves.
The proposals relate to means of cattle. It is being understood that live cattle and other types of meat could be brought under consideration as appropriate and necessary. (Paragraph 1)

It is envisaged that separate arrangements would need to apply to frozen and chilled meat. (Paragraph 5)

Each contracting party undertakes to reduce or terminate the amount of support given to production of animals yielding meat of individual elements of such support (e.g., beef, lamb, mutton, etc.). Contracting parties maintaining high levels of support must reduce these levels to those of the individual elements of such support. In other cases, the contracting parties may maintain high levels of support for individual elements of support, but may not exceed these levels for other elements of support. (Paragraph 12)

The proposal relates to "cattle meat, mutton and pork". (Paragraph 6)

The offer relates to "beef and veal (BM 65.01 & 22)". (Paragraph 8)

The Norwegian Government will continue to take measures in order to limit and adapt production to the level at which national support costs are compatible with those of frozen meat imported into the Community. (Paragraph 15)

In the context of its domestic support policies the United Kingdom will aim to reduce the expected share of home production to the expected growth of demand in the market. In the event of the world supply position changing so that new forms of import regulation become necessary, the United Kingdom would adopt domestic support policies consistent with the implementation of any agreement arrived at as a result of the consultations envisaged ... (see under "Access" below). (Paragraph 8)
The binding of the support margin shall leave each party free to adjust the support margin to be used within the framework of its export system.

... each party shall notify the Council of the list of instruments which may be related to the support margin. (Paragraph 17)

Furthermore, when the support margin may apply to the sale in certain instruments, the parties shall notify the Commission of the instruments to which it shall apply. (Paragraph 20)

Subject to a derogation by the Council, one or more specific instruments may affect a number of instruments necessary for reasons of overriding interest. (Paragraph 20)

The United Kingdom, however, recognizes the quantitative restrictions on the entry of the products dealt with in this Article, except for imports from the United Kingdom. The United Kingdom is prepared to ensure an assurance about the level at which such restrictions might be applied if changes in the position in the United Kingdom were apparent as to make this necessary.

In such circumstances, the United Kingdom would be ready:

(i) to consult with the importing countries concerned on the character and level of any restrictions to be applied and of any assurances of supply to be given; and

(ii) to provide the opportunity of continued access for imports at a level which had regard to the actual level of trade in those products arising during the period 1959-61 and the average annual production in 1959-63. (Paragraph 17)
International Prices

The international reference price for frozen bovine meat is at the same time an instrument for determining the support granted to producers and an instrument for stabilizing prices in international trade. (Paragraph 3)

The international reference price, conceived as being a minimum price applicable in international trade, shall be fixed f.o.b. in units of account per metric ton, for a specified type and quality of meat considered as being representative in the world market. (Paragraph 6)

The geographical situation of the various exporting countries may justify a differentiation in the prices ruling in international trade. (Paragraph 8)

The level of the international reference price for frozen meat shall be negotiated between all the parties to the General Arrangement.

In so doing, the parties shall take account of the need to fix an equitable and representative price level satisfactory to their producers as well as their consumers and such as will facilitate a better market equilibrium. (Paragraph 9)

Acceptable conditions of international competition and procedures which make it possible to correct the effects of national policies should make possible sufficiently stable international prices which will help to balance world supply and demand in the long run. Other elements could not be moderate fluctuations due to seasonal changes in the international market. (Paragraph 6)

Efforts should be made to reach agreement on international or regional minimum prices for beef and veal. In the Danish view, such minimum prices should be fixed at a level which will ensure a reasonable remuneration to efficient producers. The contracting parties should undertake to refrain from exporting or importing beef and veal at prices below the international minimum price. Observance of this obligation should be ensured by means of levies on exports or, failing this, levies on imports. (Paragraph 2(b))

Exporting countries shall take all appropriate measures within their power to ensure, as far as they are concerned, that the international reference price is observed. To this end, these countries shall apply the specific instruments of their agricultural and commercial policies in an appropriate manner. (Paragraph 10)

Where supplies are offered at prices below the level of the international reference price, importing countries which are Countries which have observed the international reference price shall be exempt from the compensatory levy requirement. In practice, each importing country shall be responsible for determining the method of levying the compensatory amount. (Paragraph 11)

In the administration of the compensatory amount, importing countries shall take account of the measures provided by exporting countries which are parties to the General Arrangement to ensure observance of the international reference price. (Paragraph 12)
PROPOSALS FOR A GENERAL ARRANGEMENT

At the meeting of the Group on 25 October, nine members, which had not yet submitted formal written proposals for a general arrangement, commented verbally on the attitudes of their governments towards a general arrangement and on the possible content of such an arrangement. These verbal comments are summarized in the attached tabular sheets. General observations appear under the heading "General" whilst comments on particular aspects of a possible arrangement are listed under the following headings:

- Products Included
- Agricultural Policies
- Access
- International Prices
- Assurance of Supply
- Other Matters
<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>CANADA</th>
<th>DENMARK</th>
<th>JAPAN</th>
<th>NEW ZEALAND</th>
<th>POLAND</th>
<th>SWITZERLAND</th>
<th>SWEDEN</th>
<th>YUGOSLAVIA</th>
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| General | The existing proposals contain inadequate provisions for the formulation of a trade agreement. Canada cannot contribute importantly at this stage but it will participate in the negotiation of the final text of the agreement. | Most countries face significant difficulties when it comes to formulating a general agreement. Denmark has genuine doubts as to whether a comprehensive approach is necessary for the beef trade. A general agreement does not need to go beyond (a) improved access through more liberal quantitative arrangements, (b) trade diversionary measures where this could be the appropriate form of compensation and (c) the establishment of a set of principles to govern trade in beef. | Sweden attaches great importance to a conclusion of a well-drafted agreement on beef, and is prepared to consider contributions to the objectives of the Ministerial Resolution, Switzerland is ready to participate in the formulation of a general agreement. | Norway is of the view that a package is the key to resolving the objectives of the Ministerial Resolution. 
| Products Included | Fresh, frozen and chilled beef. Beef, veal and mutton, whether fresh, frozen or chilled. | A general arrangement should cover all types of beef, frozen or chilled. | Fresh, frozen and chilled beef. Beef, veal and mutton, whether fresh, frozen or chilled. | 
| Agricultural Policies | Apart from arrangements for the United Kingdom market, the trade in beef is subject to conditions determined by conditions on the world market. | Japan has no internal support system for beef. Protection is only at the frontier. | In response to the reasonably satisfactory market demand on the basis of projections of the likely supply and demand position in the future, New Zealand has plans for increased production in beef production. | 
| | New Zealand's agricultural policy is presently being revised. | | | 
| | All countries should consider and be encouraged to eliminate all unnecessary marketing or export restrictions. | | | 
| | By undertaking commitments on annual, non-discriminatory production and export restrictions, member countries agree to undertake minimum commitments in relation to their agricultural policy. | | | 
| | | | | 
| | | | |
**Austria**

Austria is preparing to undertake a major effort to ensure a reasonably stable supply of imports, particularly of meats and dairy products. This effort includes measures aimed at safeguarding the supply of these commodities, such as imports from the EEC and other countries. The measures are designed to prevent fluctuations in supply and to ensure a steady flow of imports, which is essential for maintaining the stability of the market.

**Ireland**

Ireland is very interested in increasing its exports of meat and dairy products to the EEC market. This interest is partly due to the high prices being paid for these products in the EEC, which would lead to an increase in the supply of these goods to the market. Ireland is also interested in expanding its exports of meat and dairy products to other markets, such as the United States.

**Japan**

Japan is very interested in the import of meat and dairy products from the EEC. This interest is partly due to the high prices being paid for these products in Japan, which would lead to an increase in the supply of these goods to the market. Japan is also interested in expanding its imports of meat and dairy products from other countries, such as the United States.

**New Zealand**

New Zealand is very interested in increasing its exports of meat and dairy products to the EEC market. This interest is partly due to the high prices being paid for these products in the EEC, which would lead to an increase in the supply of these goods to the market. New Zealand is also interested in expanding its exports of meat and dairy products to other markets, such as the United States.

**Finland**

Finland is very interested in increasing its imports of meat and dairy products from the EEC market. This interest is partly due to the high prices being paid for these products in Finland, which would lead to an increase in the supply of these goods to the market. Finland is also interested in expanding its imports of meat and dairy products from other countries, such as the United States.

**Export Measures**

The concern for trade in meat lies in the fact that this product is imported in large quantities, which could lead to supply disruptions. To address this issue, the EEC has introduced measures to ensure a steady supply of meat and dairy products to the market. These measures include the establishment of a quota system, which limits the amount of imports that can be sold in the market, and the imposition of tariffs on imports of meat and dairy products.

**International Prices**

International prices of meat and dairy products can vary significantly, depending on the origin of the product and the market conditions. The EEC has established a system of reference prices for these products, which are intended to provide a common reference point for the pricing of these products in the EEC. These reference prices are used to determine the prices at which meat and dairy products are sold in the market.

**Regional Arrangements**

Regional arrangements have been established to ensure the stability of the market for meat and dairy products. These arrangements include the establishment of common reference prices, which are intended to provide a common reference point for the pricing of these products in the region. These arrangements also include measures to ensure a steady supply of meat and dairy products to the market, such as the establishment of import quotas and the imposition of tariffs on imports of meat and dairy products.

**Conclusion**

In conclusion, it is clear that the stability of the market for meat and dairy products is essential for the functioning of the EEC market. Measures have been taken to ensure a steady supply of these products to the market, and regional arrangements have been established to promote the stability of the market.

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For more detailed information, please refer to the tables below.

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<tr>
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### Table: Arabian, Canadian, Irish, Japanese, New Zealand, Polish, Swedish, Swiss, Yugoslav

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<td>Poland&lt;br&gt;The solution to this&lt;br&gt;important problem&lt;br&gt;should be found&lt;br&gt;initially by the main&lt;br&gt;exporting and&lt;br&gt;importing countries.&lt;br&gt;Poland is ready to&lt;br&gt;possibly participate&lt;br&gt;in any system agreed&lt;br&gt;upon but is not&lt;br&gt;willing to take any&lt;br&gt;initiative with&lt;br&gt;respect to this&lt;br&gt;question.</td>
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<td>Switzerland</td>
<td>Yugoslavia</td>
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### Other Matters

**INT(66)599**

- **Price levels** established should be stable, equitable andremunerative.
- **Regional arrangements** will probably be necessary in this respect.

### Additional Notes

It has to be recognized that a general world-wide arrangement would give rise to certain problems. There are two aspects of non-participation: one is that it would be more appropriate for arrangements in respect of live animals to be based on an international approach rather than an informational approach.
GROUP ON MeaT

PROPOSALS FOR A GENERAL ARRANGEMENT

The present document supplements and modifies the information given in the documents of 30 October 1966 (unnumbered) and 26 October (LNT(66)785). Texts pertaining to "Objectives", derived from the proposals made, or, in the case of Japan, supplied by the delegation, are presented in tabular form.

Additional or modified texts are given in respect of the European Economic Community and Poland.
This General Agreement and the special agreements concluded pursuant to it between the principal importing and exporting countries shall constitute (5):

1. a significant development and expansion of world trade in foods, meat;
2. a better balance between aggregate supply and demand for this commodity in international markets;
3. guaranteed international prices at levels remunerative to producers and equitable to consumers, as well as the stabilization of those prices in periods of depression;
4. the creation of acceptable conditions of access to world markets, compatible with the commitments to an ordered world trade, and the betterment of those terms in periods of depression;
5. the sterilization of national reserve funds in levels that do not prejudice the expansion of international trade and the commitment to marginal production;
6. the equitable participation of efficient producers in consumption increases;
7. the reassertion of probable trends in international supply demand, so as to assure exporting countries of adequate supplies and importing countries of adequate supplies at the appropriate time;
8. no disruptive distortions in prices and supplies caused by excess or seasonal character.

In general, to establish the Latin American co-operation between the participating countries with regard to the overall problems relating to fertilizers and meat, with a view to obtaining the efficient operation of the General Agreement.

Consistent with the general guidance of the Kennedy Round trade negotiations the ultimate goal of these negotiations should be to obtain a significant reduction in existing barriers to trade in beef and veal and to ensure "acceptable conditions of access to world markets in the near future") for meat.

The central aim of the United States delegation reaffirms these statements made at the Ministerial, meeting in May 1965.

The negotiations shall provide for acceptable conditions of access to world markets in the near future for meat.

2. The General Agreement on Trade must also aim at:
   - to achieve and maintain a better balance between aggregate supply and demand;
   - to establish stable world prices at levels remunerative for producers and equitable for consumers;
   - to raise acceptable conditions of access to world markets in furtherance of a significant development and expansion of world trade.

The General Agreement on Trade must constitute an appropriate framework for commitments with respect to elimination of internal policy changes to promote equitability of the exporting country and the importing country, and to facilitate the introduction of new measures concerning international trade.
European Economic Community

The following changes are made in the document of 19 October 1966
(numbered):

Under "Access", insert:

For EEC, creation of acceptable conditions of access must result from combination of appropriate measures, such as:

(1) setting of support margins in relation to elements of internal agricultural policy, including producer's return and development and protective measures instituted at the frontier;

(2) adoption of mechanisms of reference prices in relation to export and import policies applied.

Under "Assurance of Supply": delete word, which is transferred to "Other Matters".

Under "Other Matters": Delete paragraph beginning "In paragraph 3 ...".

"Other Matters" new words:

In order to permit a better adjustment of supply to demand in the world market, the parties to the Agreement shall consult together each year and shall examine the situation and prospects for production and international trends. (Paragraph 21)

In the event of acute difficulties in the world market, the Council of the Agreement may recommend the introduction of specific measures to stabilize supplies in the more or less long term, in particular by concerted restraint in marketing. (Paragraph 22)
Poland

Under "Other Matters" in document INT(66)576, insert:

The Polish delegation considers that provisions on live cattle and fresh meat in particular should be different from those on frozen meat, for the following reasons:
- there is no world trade in live cattle and fresh meat, such exchanges being limited to specific regions;
- prices and access to markets for live cattle and fresh meat are closely dependent on internal situation in a few import markets situated in vicinity of exporting country concerned;
- as a result prices of live cattle and fresh meat are subject to short-term fluctuations and seasonal variations which are not apparent to the same extent in formation of prices of frozen bovine meat;
- demand for the two types of meat is different in character. In case of fresh meat, demand is for direct consumption; as regards frozen meat, demand by processing industry possibly replaces demand for direct consumption;
- having regard to this situation, it would not seem that one could provide the same stabilizing mechanisms for live cattle and fresh meat as for frozen meat. By definition, fresh meat cannot be held in stock, for it would change in character. For the same reason, it cannot be sold outside the region;
- since prices of live cattle and fresh meat progress at a different rate from prices of frozen bovine meat, it would seem that value coefficient for fresh meat in relation to frozen meat can be considered solely as an indicator of a general character. It goes without saying that it should be possible to establish minimum prices for fresh meat according to region, taking into account the situation of markets constituting a specific region.
DRAFT

ELEMENTS TO BE CONSIDERED FOR INCLUSION IN A
GENERAL ARRANGEMENT ON MEAT

PART I - GENERAL

Article 1 - Objectives

Article 2 - Coverage

PART II - RIGHTS AND OBLIGATIONS

Article 3 - International reference price

1. The international reference prices for frozen and chilled beef meats are respectively the c.i.f. prices laid down in Annex A for each country of destination indicated in that annex, established for the types of meat specified in that annex, on the basis of the arithmetic average of the c.i.f. prices prevailing in that country of destination during a representative period preceding the entry into effect of this Arrangement.

2. The Committee on price equivalents provided for under Article of the Arrangement shall determine, where appropriate, the reference prices for the countries or types of frozen or chilled bovine meat not listed in Annex A.

Article 4 - Stabilization of the market

1. (a) Participating countries listed in Annex B shall accord unrestricted entry into their market for any offering of meat by another participating country at a c.i.f. price at or above the relevant reference price as defined in Article 3 above. The provisions of this paragraph shall not apply to customs duties in force in terms of the tariff of the participating country, nor to normal customs clearance charges.

(b) When the c.i.f. prices in its market of imports of a type of meat, originating in any country having a substantial interest in exports of meat to that market, are below the relevant reference price for a period of twenty-eight days, each participating country listed in Annex B shall be entitled to introduce a quantitative limitation on imports of that type of meat from all sources, in accordance with the quota provisions laid down in Annex B or in accordance with the provisions of sub-paragraph (c) of this Article.

(c) In the circumstances referred to in sub-paragraph (b) above, the participating importing countries concerned shall consult with the exporting countries concerned on the character and level of any restrictions to be applied and of any assurances of supply to be given. The participating importing countries shall provide opportunity for continued access for imports at a level which has regard to the actual level achieved during a recent representative period prior to the changes in question and to the likely trend of demand.
(d) Participating countries listed in Annex B undertake, with respect to the instruments of their national agricultural or commercial policy, identified for each of them in that annex, such specific commitments as are laid down in that annex.

2. (a) Participating countries listed in Annex C to this Arrangement undertake:

(i) not to increase their support so as to raise the return of the meat producers beyond the level existing on the date of this Arrangement as specified in Annex C or, alternatively,

(ii) not to increase the margin of difference between, on the one hand, the national support or target price for meat and, on the other, the international reference price, established for the participating country concerned in accordance with the provisions of Article 3, made comparable to the national support or target price.

(b) In addition to the commitments undertaken under sub-paragraph (a) of this paragraph, participating countries listed in Annex C undertake such specific commitments as are laid down in that annex.

3. (a) The participating countries listed in Annex D to this Arrangement undertake, with respect to the instruments of their national agricultural or commercial policy, identified for each of them in that annex, commitments specified in that annex equivalent in their effect to the commitments undertaken under paragraphs 1 and 2 above.

(b) In particular, when the instruments identified under sub-paragraph (a) above, include quota restrictions on meat imports, such quotas shall be fixed in agreement with the participating exporting countries having a substantial interest in exports of meat to the market of the participating country concerned. Furthermore, such quotas shall be revised annually so as to permit imports to share in any growth in the market.

Article 5 - Assurances of supply

Exporting countries shall undertake to adopt the internal measures that they consider necessary and appropriate in order to ensure continuous supplies meeting the requirements of world demand, and shall likewise undertake to regulate consignments so as not to cause any disruption in import markets. They shall periodically notify to the organ of the Council responsible for supervising the operation of the Arrangement the exportable volumes for each annual period and the probable phasing of shipments during the year.
SECRET
23 Novembre 1966

PROJET

ELEMENTS À PRENDRE EN CONSIDÉRATION EN VUE DE LEUR INCLUSION
DANS UN ARRANGEMENT GÉNÉRAL SUR LA VIANDE

PREMIERE PARTIE - DISPOSITIONS GÉNÉRALES

Article 1 - Objet

Article 2 - Champ d'application

DEUXIÈME PARTIE - DROITS ET OBLIGATIONS

Article 3 - Prix de référence international

1. Les prix de référence internationaux des viandes bovines congelées et réfrigérées sont, pour les pays de destination nommés à l'annexe A, les prix c.a.f. correspondants indiqués à ladite annexe, établis pour les types de viande spécifiés dans cette annexe sur la base de la moyenne arithmétique des prix c.a.f. pratiqués dans le pays de destination pendant une période représentative antérieure à l'entrée en vigueur du présent Arrangement.

2. a) Le Comité des équivalences de prix prévu à l'article de l'Arrangement détermine, s'il y a lieu, les prix de référence pour les pays ou les types de viandes bovines congelées et réfrigérées non mentionnés à l'annexe A.

Article 4 - Stabilisation du marché

1. a) Les pays participants énumérés à l'annexe B s'accordent mutuellement le libre accès à leur marché pour toute offre de viande faite à un prix c.a.f. égal ou supérieur au prix de référence correspondant défini à l'article 3 ci-dessus. Les dispositions du présent paragraphe ne s'appliquent pas aux droits de douane en vigueur d'après le tarif du pays participant ni aux impositions douanières normales auxquelles donne lieu le dédouanement.

b) Si, à l'importation sur le marché d'un pays participant nommé à l'annexe B les prix c.a.f. d'un type de viande originaire d'un pays quelconque ayant un intérêt substantiel dans les exportations de viande vers ce marché restent inférieurs au prix de référence pendant une période de 28 jours, le dit pays participant a le droit de limiter en quantité les importations de toutes provenances de ce type de viande conformément aux dispositions contingentaires de l'annexe B ou aux dispositions de l'alinéa c) du présent article.
c) Dans les circonstances visées à l'alinéa b) ci-dessus, les pays participants importateurs concernés engagent avec les pays exportateurs concernés des consultations sur la nature et le niveau des restrictions à appliquer et sur les garanties d'approvisionnement à donner. Les pays participants importateurs maintiennent l'accès pour les importations à un niveau en rapport à la fois avec le niveau effectivement atteint pendant une période représentative récente antérieure aux changements en question, et avec la tendance probable de la demande.

d) Les pays participants nommés à l'annexe B s'engagent à prendre, pour ce qui est des instruments de politique agricole ou commerciale identifiés pour chacun d'entre eux à cette annexe, les engagements spécifiques énoncés dans ladite annexe.

2. a) Les pays participants nommés à l'annexe C du présent Arrangement s'engagent:

i) soit à ne pas accroître le soutien d'une manière qui aurait pour effet de porter la rémunération des producteurs de viande à un niveau supérieur au niveau existant à la date du présent Arrangement, tel qu'il est spécifié à l'annexe C,

ii) soit à ne pas accroître la marge existant entre d'une part le prix de soutien ou le prix indicatif national de la viande et d'autre part le prix de référence international établi pour le pays participant concerné conformément aux dispositions de l'article 3, rendu comparable au prix de soutien ou au prix indicatif national.

b) En plus des engagements souscrits conformément à l'alinéa a) du présent paragraphe, les pays participants nommés à l'annexe B et C souscrivent les engagements spécifiques énoncés dans ladite annexe.

3. a) Les pays participants nommés à l'annexe D du présent Arrangement souscrivent, pour ce qui est des instruments de leur politique agricole ou commerciale nationale identifiés pour chacun d'entre eux dans cette annexe, des engagements, spécifiés dans ladite annexe, d'un effet équivalent à celui des engagements souscrits en vertu des paragraphes 1 et 2 ci-dessus.

b) En particulier, quand les instruments identifiés en vertu de l'alinéa a) ci-dessus comprennent des restrictions contingentes à l'importation de la viande, les contingents en question sont fixés avec l'accord des pays participants exportateurs pour qui les exportations de viande vers le marché du pays participant concerné présentent un intérêt substantiel. En outre, ces contingents sont revisés chaque année de façon à permettre aux importations de participer aux avantages de la croissance du marché.
Article 5 - Garanties d'approvisionnement

Les pays exportateurs s'engagent à adopter les mesures intérieures qu'ils estiment nécessaires et appropriées pour assurer un approvisionnement continu répondant aux besoins de la demande mondiale; ils s'engagent pareillement à régulariser leurs envois de façon à ne causer aucune désorganisation des marchés d'importation. Ils notifient périodiquement à l'organe du Conseil chargé de surveiller l'application de l'Arrangement les quantités exportables pour chaque période annuelle et l'échelonnement probable des livraisons au cours de l'année.
Note by the Director-General

From informal consultations with some of the participants in the Group on Meat, I have arrived at the conclusion that at this juncture it is not possible to draw up a draft outline for a multilateral arrangement in which the countries belonging to the Group could concur.

I thought that it might be useful, however, to submit to the members of the Group some elements that might, in a first stage, facilitate further negotiations.

In the light of the progress of these negotiations, the Group would then need to meet to decide how an acceptable multilateral arrangement could be negotiated.
Elements that Might Facilitate Further Negotiations

International reference prices

1. The international reference prices for bovine meats are respectively the c.i.f. prices laid down in Annex A for each country of destination indicated in that Annex, established for the type of meat specified in that Annex, on the basis of the arithmetic average of the c.i.f. prices prevailing in that country of destination during a representative period preceding the entry into effect of this Arrangement.

2. (a) The Committee on Price Equivalents provided for under Article ... of the Arrangement shall determine, where appropriate, the reference prices for the countries or types of bovine meats not listed in Annex A.

(b) Each participating country may, if necessary, consult the Committee on Price Equivalents in order to examine whether the prices prevailing for other qualities and types of meats effectively correspond to the international reference prices.

3. Participating importing and exporting countries undertake to apply the specific instruments of their agricultural and commercial policy in such a way as to ensure that the international prices are stabilized, in particular, participating countries undertake, when exporting, to regulate consignments in such a way as to stabilize international prices.

4. If a participating country considers that the situation of prices on a particular market so requires, it may request the Council to consult with participating countries in order to remedy the situation.

Obstacles of this nature

1. (a) The participating countries listed in Annex B shall accord unprivileged entry into their market for any offering of meat by another participating country at a c.i.f. price at or above the relevant reference price as defined in Article 3 above. The provisions of this paragraph shall not apply to customs duties in force in terms of the tariff of the participating country, nor to normal customs clearance charges.

(b) When the c.i.f. prices in the market of imports of a type of meat originating in any country having a substantial interest in exports of meat to that market, are below the relevant reference price for a period of twenty-eight days, each participating country listed in Annex B shall be entitled to introduce a limitation on imports of that type of meat from all sources, in accordance with the provisions laid down in Annex D or in accordance with the provisions of sub-paragraph (c) of this Article.

(c) In the circumstances referred to in sub-paragraph (b) above, the participating importing countries concerned shall consult with the exporting countries concerned on the character and level of any restrictions to be applied and of any assurances of supply to be given. The participating importing countries shall provide opportunity for continued access for imports at a level which has regard to the actual level achieved during a recent representative period prior to the changes in question and to the likely trend of demand.

2. The participating countries listed in Annex C to this Arrangement shall accord unprivileged entry into their market for any offering of meat by another participating country at a c.i.f. price at or above the relevant reference price as defined in Article 3 above, as long as the price of its internal market is at or above (X %) of the support or target price. The provisions of this paragraph shall not apply to customs duties in force in terms of the tariff of the participating country, nor to normal customs clearance charges.

3. The participating countries listed in Annex D to this Arrangement shall provide opportunity for continued access for imports at a level, specified in the Annex, which has regard to the actual level achieved during a recent representative period and which shall be revised annually in such a way as to permit imports to share in any growth in the market.

Internal price and supply policies

1. The participating countries listed in Annexes B, C and D to this Arrangement undertake in respect of their national policy on bovine meats as described in paragraph 3 hereafter, to the total effect of the various elements of support of protection, and/or commitments as described in paragraph 3 hereafter, relating to all relevant elements of support or protection.
2. Participating countries listed in Annex C to this Arrangement undertake either not to increase their support so as to raise the return of the meat producers beyond the level existing on the date of this Arrangement as specified in Annex C, or alternatively to bind the support such as results from the difference between the international reference price and the return of the meat producers in the country concerned.

3. The participating countries listed in Annexes B, C and D to this Arrangement undertake, with respect to the instruments of their national agricultural or commercial policy, identified for each of them in those annexes, such specific commitments as are laid down in those annexes.

Exporting countries undertake to adopt the internal measures that they consider necessary and appropriate in order to ensure continuous supplies meeting the requirements of world demand.
Élèves qui pourraient faciliter les prévisions ultérieures

Prix de référence internationaux

1. Les prix de référence internationaux des viandes bovines sont, pour les pays de destination mentionnés à l'annexe A, les prix en brut correspondant indiqués à ladite annexe, établis pour les types de viande spécifiés dans cette annexe sur la base de la moyenne arithmétique des prix en brut pratiqués dans le pays de destination pendant une période représentative antérieure à l'entrée en vigueur du présent Arrangement.

2. a) Le Comité des équivalences de prix prévu à l'article de l' Arrangement détermine, s'il y a lieu, les prix de référence pour les pays où les types de viandes bovines ne sont pas mentionnés à l'annexe A.

b) En cas de besoin, le Comité des équivalences de prix peut être consulté par une liaison partielle à l'Arrangement pour examiner si les prix pratiqués pour d'autres qualités et présentations de viandes correspondent effectivement aux prix internationaux de référence.

3. Les pays participant importateurs et exportateurs s'engagent à faire des instruments spécifiques de leur politique agro-alimentaire et commerciale un usage propre à assurer que les prix internationaux soient stabilisés. En particulier, les pays participants qui exportent s'engagent à régulariser leurs excédents de prix à stabiliser les prix internationaux.

4. Si un pays participant considère que la situation des prix sur un marché particulier l'engage, il peut demander au Comité d'engager des consultations avec les pays participants en vue de remédier à cette situation.

Annexe au présent

1. a) Les importateurs participant à l'annexe B accordent le libre accès à leur marché pour toute offre de viande faite par un pays participant à un prix au niveau de la base de l'arrangement, aux importateurs correspondant définis à l'article 5 ci-dessous. Les dispositions du présent paragraphe ne s'appliquent pas aux droits de douane ou en vigueur d'après le tarif du pays participant ni aux excédents d'accords annexes auquel il a lieu le dédommagement.

b) Si, en l'annexe ci-dessus au marché d'un pays participant nommé à l'annexe B, les prix au niveau d'un type de viande orientatif d'un pays quelconque sont inférieurs à l'exportation du type de viande de viande vers ce marché au niveau inférieur au tarif de référence pendant une période de 15 jours, le pays participant demande de limiter les importations de viandes prouvées à ce type de viande conformément aux dispositions de l'annexe B ou aux dispositions de l'annexe ci-dessus du présent Arrangement.

c) Dans les circonstances visées à l'alinéa b) ci-dessus, les pays participant importateurs concernés procèdent avec les pays exportateurs convenus à des consultations sur la nature et le niveau des restrictions à appliquer et sur les garanties d'approvisionnement à donner. Les pays participant importateurs maintiennent une possibilité d'accès au marché pour les importations à un niveau en rapport à la date avec le niveau effectivement moins pendant une période représentative récente, antérieure aux changements de question, et avec les tendances précédentes de la demande.

2. Les pays participants nommés à l'annexe C du présent Arrangement accordent le libre accès à leur marché pour toute offre de viande faite par un pays participant à un prix au niveau de la base de l'arrangement, aux importateurs correspondant définis à l'article 5 ci-dessous, pour le tarif de référence défini du présent paragraphe, et au tarif de base ci-dessus pour un périod de 15 jours après le tarif à la date des pays participant ni aux dispositions annexes auxquelles il a lieu le dédommagement.

3. Les pays participants nommés à l'annexe D du présent Arrangement maintiennent une possibilité d'accès au marché pour les importations à un niveau, pendant dans la date, en rapport avec le niveau effectivement inférieur pendant une période représentative récente et qui aura été qui a été effectiv du fait d'accords de libre de vendre sur importateurs de participer aux avantages de la croissance du marché.
Politiques internes de prix et de soutien

1. Les pays participants nommés aux annexes B, C et D du présent Arrangement souscrivent, en ce qui concerne leur politique nationale relative à la viande bovine, les engagements qui sont énoncés au paragraphe 2 ci-après au sujet de l'effet global des divers éléments de soutien ou de protection, et/ou les engagements énoncés au paragraphe 3 ci-après au sujet de tous les éléments pertinents de soutien ou de protection.

2. Les pays participants nommés à l'annexe C du présent Arrangement s'engagent soit à ne pas accroître le soutien d'une manière qui aurait pour effet de porter la rémunération des producteurs de viande à un niveau supérieur au niveau existant à la date du présent Arrangement tel qu'il est spécifié à l'annexe C, soit à consolider le soutien tel qu'il résulte de la différence entre le prix international de référence et la rémunération des producteurs de viande du pays considéré.

3. Les pays participants nommés aux annexes B, C et D du présent Arrangement souscrivent, pour ce qui est des instruments de politique agricole ou commerciale identifiés pour chacun d'entre eux dans ces annexes, les engagements spécifiques énoncés dans lesdites annexes.

Garanties d'approvisionnement

Les pays exportateurs s'engagent à adopter les mesures intérieures qu'ils estiment nécessaires et appropriées pour assurer un approvisionnement continu répondant aux besoins de la demande mondiale.