

GENERAL AGREEMENT ON
TARIFFS AND TRADE

RESTRICTED

IMC/W/34
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Special Distribution

Arrangement Regarding Bovine Meat

INTERNATIONAL MEAT COUNCIL

Revision of the Statistical Questionnaire

At the December 1983 meeting of the International Meat Council, the Chairman invited participants to submit suggestions for the revision of the Statistical Questionnaire to be discussed at the June 1984 meeting of the Meat Market Analysis Group. Pursuant to that invitation the following note¹ has been prepared by Canada.

SUGGESTED CHANGES TO QUESTIONNAIRE, PARTS A-F

1. The present questionnaire was developed by the Consultative Committee on Meat which was established prior to the Arrangement Regarding Bovine Meat coming into force on 1 January 1980. The format of the questionnaire has been largely unchanged in the intervening period. It therefore would seem appropriate to review the experience to date in relation to the questionnaire.
2. Since its introduction, the present questionnaire has provided the basis to collect the information necessary for a thorough review of the situation and outlook in the world beef market. Similarly it continues to be the focal point for the deliberations of the International Meat Council and the Meat Market Analysis Group. The suggested changes are aimed at ensuring that the information available to the Meat Market Analysis Group and the International Meat Council continues to provide an optimum framework for analysing the current situation and future developments in the international meat and livestock market.
3. The areas where modifications may be appropriate can be considered under the following headings.

SIMPLIFICATIONS

4. It is important that the data available should be as current as possible. Therefore a major objective of the suggested changes in the questionnaire is to improve the timeliness of replies. This is essential

¹Subsequent notes by other participants on the same subject will be issued as addenda to the present note.

to ensure that the latest information is at hand to assess future market developments. It is possible that for some countries the detail requested in some parts of the questionnaire is a factor resulting in late responses.

5. This problem would appear to be particularly evident in relation to Part C which requires the submission of export and import data on a quarterly basis. This information is requested not only in aggregate terms but also for origin in the case of imports and destination for exports. A review of recent responses suggests that a number of countries are facing problems in providing data in this degree of precision and therefore submit only annual figures.

6. In view of the incomplete availability of this trade information on a quarterly basis, the secretariat has not been in a position to analyse short-run trends in exports and imports with any precision. It is therefore for consideration whether the questionnaire might be simplified if the requirement for the quarterly trade information for individual countries in Part C is omitted. In this way, the questionnaire would be considerably simplified and shortened. This could result in a reduction in the time needed for completion in capitals and the more timely submission of replies to the secretariat.

7. On the other hand it would not seem appropriate to remove the obligation to submit quarterly data in relation to Part B of the questionnaire. This relates to slaughtering, production, stock levels and consumption. Quarterly information in these areas is particularly useful in identifying and forecasting supply and demand conditions and their resulting impact on export availabilities and import requirements.

MEAT OTHER THAN BEEF

8. Although the Arrangement is primarily concerned with bovine meat, it is increasingly evident that it is difficult to assess international market conditions without reference to competing meats. These include pigmeat, poultry meat, mutton and lamb. At recent sessions of the International Meat Council, it would appear that these alternative meats are having a major impact on the international beef market.

9. Against this background, it would seem appropriate to consider whether a further section should be added to the questionnaire to provide information in relation to production, consumption and trade for these competing meats. If feasible, it would be useful to show data both for the latest available period and forecasts.

10. Information on the situation and outlook for meats other than beef is already collected by the FAO and the OECD. It is therefore unlikely that this extra question would require much additional effort to provide the necessary information.

ANALYSIS

11. Since replies to the questionnaire are now available for each year since 1979, the scope for the analysis of trends in the international beef market is expanded. The data submitted over this period represents a valuable body of information which can be used to obtain an improved understanding of the international beef market. In this way it will be possible to identify various means of achieving greater liberalization and stability of the international market.

12. The fourth annual report on the operation of the Arrangement provides some preliminary analysis in relation to production and exports. The availability of further data should permit additional analysis in other areas, e.g. export market shares, national self-sufficiency, etc.

SPECIFIC PROPOSALS/QUESTIONS

- Table A.1: To this table could be added the pig and sheep populations (where these are significant to the nation's or world's meat supply). Poultry numbers are important but, due to the shorter production cycle, flock size may be less meaningful.
- Table B.1: There may not be a need to separate "inspected" from "other". The average dressed weight is not particularly meaningful in the total picture. If there is a marked change in the percentage of females in the slaughter, or in average weights, seen by any country it could be noted on the table or in a separate comment together with an assessment of its probable effect on the world trade situation.

Hog, sheep and other slaughter could be added but this may be less important than including the actual production.
- Table B.3 and Table 4: The concern in reporting stocks is to note how much product may be hanging over the market to depress prices or to note any potential shortage that could strengthen them. Stocks of competing meats could be added. This is one table where quarterly figures are particularly useful.
- Tables B.4 and 5: Consumption - no changes are suggested in relation to these tables but figures for pork, sheep meat and poultry could be added.
- Table C.1.1 - Tables 5, 6, 7 and 8: It is for consideration whether the movement of live cattle is important to world trade in beef. Cattle which move will be reported as beef production in the receiving country. Most of the live trade is between neighbouring countries and does not affect major trades in beef. Also it may not be necessary to separate fresh or chilled from frozen. Both forms of beef trade between the same markets. On the other hand, there is a reason to

have cooked and canned meat separated because these can move in channels where fresh or frozen meat may not be traded due to health restrictions.

- Tables C.2, C.3 and C.4: It is for consideration whether information on the value of trade is essential. Similarly it may not be necessary to include data on a quarterly basis. At present little analysis of this information is being undertaken.