THE INTERNATIONAL MARKETS FOR MEAT

1985

GENERAL AGREEMENT ON TARIFFS AND TRADE

GENEVA, JANUARY 1986

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Introduction

The Arrangement Regarding Bovine Meat has been in force since 1 January 1980. The objectives of the Arrangement are inter alia to promote the expansion, ever greater liberalization and stability of the international meat and livestock market by facilitating the progressive dismantling of obstacles and restrictions to world trade in bovine meat and live animals, and by improving the international framework of world trade to the benefit of both consumer and producer, importer and exporter. To this end, the Arrangement provides for a comprehensive information and cooperation mechanism applicable to bovine animals and the bovine meat sector.

To date there are twenty-six signatories of the Arrangement - Argentina, Australia, Austria, Belize, Brazil, Bulgaria, Canada, Colombia, Egypt, European Community, Finland, Guatemala, Hungary, Japan, New Zealand, Norway, Paraguay, Poland, Romania, South Africa, Sweden, Switzerland, Tunisia, United States, Uruguay and Yugoslavia. Representatives of other countries as well as of international governmental organizations follow its work as observers.

The International Meat Council, established in accordance with the Arrangement Regarding Bovine Meat and within the framework of the General Agreement on Tariffs and Trade, shall, among other tasks, make an evaluation of the world supply and demand situation and outlook for the world market for bovine meat and live animals on the basis of a status report prepared by the secretariat. The International Meat Council decided that this report, up-dated as appropriate in December each year, would be published annually.

The sixth annual report has been prepared by the secretariat, under its own responsibility, mainly on the basis of information and documentation furnished by participants to the Arrangement. It covers the situation in the market for bovine animals and meat principally in the year 1985, containing estimates for the second half of the year and for the year 1985 as well as forecasts for 1986. To the extent permitted by the data available, it gives information mainly on cattle numbers, slaughter levels, production, prices, imports, consumption and exports of bovine animals and meat. It also provides short summaries of the situation and outlook in the pig-, poultry-, and sheepmeat markets.

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"Tons" in the text means "metric tons, carcass weight", when not otherwise stated.

I. INTERNATIONAL ECONOMIC SITUATION AND OUTLOOK

1. Although developments vary widely from one country or region to another, economic growth in the world in 1984, was, at an average of 4.5 per cent, the strongest since ten years with developing countries averaging growth of 4.4 per cent and industrial ones 4.9 per cent, according to the IMF Annual Report 1985. The IMF report indicated further that it expects a sharp slowdown in growth in 1985 averaging an increase of 3.1 per cent (2.8 per cent for industrial countries and 3.5 per cent for developing countries), while it suggests that real expansion will average some 3.4 percent in 1986, warning, however, that this latter projection is based on assumptions of a rather uncertain nature. Inflation continued to improve in 1985 and may be expected to be lower worldwide than in 1984, although some countries are likely to still average two or even three digit levels. Although employment rose considerably in some countries in 1984 and 1985, unemployment remained high in a number of countries and some analysts do not expect any dramatic improvement for some time to come. As concerns world trade, volume increased by 9 per cent in 1984, the best performance in the last eight years,[1] and a new record level. According to estimates[1] by GATT analysts a pronounced slowdown took place in 1985 both at concerns trade (up by less than 3 per cent) and production (3-3.5 per cent). Value of world trade also increased in 1984 (by 6 per cent) due to the strong increase in volume, even though export prices expressed in US dollars declined. It is estimated, however, that the US dollar value in the first half of 1985 was below that of year earlier[2].

2. The gross national product in the United States advanced at an annual rate of 3.3 per cent in the third quarter of 1985. This figure should be compared with the 1 per cent growth in the first half of the year and the earlier projected 5 per cent for the second half. Current projections give an annual growth rate for 1985 of 2.4 per cent, compared to 6.8 per cent in 1984, and around 2.7 per cent in 1986. It was expected that fourth quarter growth would strengthen considerably, a tendency that would continue in the first half of 1986. The rate of inflation continued to decrease and was 3.2 per cent for the first nine months of the year, the lowest increase since 1967. For the whole of 1985 the rate was projected at 3.7 per cent compared to 4.3 per cent in 1984. Unemployment levels continued to improve in 1985 (6.9 per cent in December) and record high employment levels were reached. Major current concerns in the United States economy remained the large budget deficit, although some analysts were disputing its effect on the economy, and the trade deficit, which it was hoped would decrease in the wake of recent depreciations in the value of the dollar.

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[1] GATT: International Trade 1984/85

[2] For more details see above-mentioned GATT report.

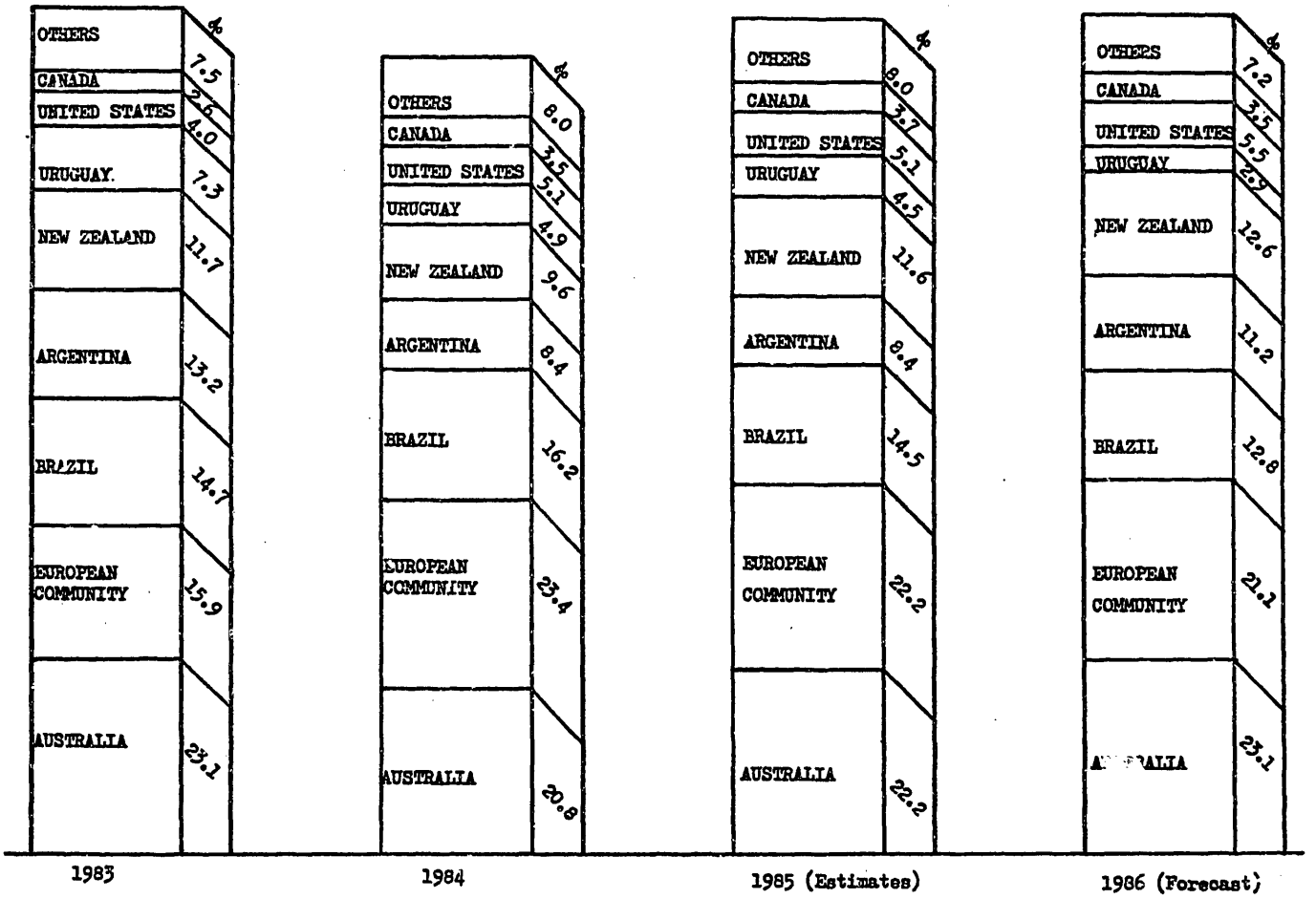
3. Inflation adjusted growth in Canada in 1985 was projected at around 4.5 per cent, somewhat more than earlier expected (3.1 per cent) and in spite of an export slowdown, but a deceleration compared to 1984 (4.7 per cent). Real output expanded at around 4.1 per cent in the twelve months to August 1985. Although rising somewhat in August, inflation rates were forecast to average 4-4.5 per cent in 1985 compared to 4.9 per cent in 1984. Unemployment levels, however, were not expected to show any major progress, projected as they were at 10.4 per cent of the work force in 1985 and around 10 per cent in 1986.

4. Despite a deceleration in export growth to the United States, the Japanese economy was still expanding at a comparatively steady rate, estimated at 4-5 per cent in 1985, compared to 5.8 per cent in 1984, the highest since 1973. Analysts were reportedly expecting capital investment to provide the basis for the growth. Also, consumer spending was reported to be firming. Compared to many other countries inflation rates were fairly modest and twelve months to August 1985 showed a consumer price increase of 2.4 per cent compared to 2.5 per cent in 1984. The figure for the whole of 1985 was not expected to vary much. Unemployment levels, although already low by current international standards, were anticipated to decrease further in 1985 to 2.3 per cent of the work force, compared to some 2.8 per cent in 1984.

5. In the European Community economic growth in 1985 was projected to average around 2.5 per cent, much the same as in 1984 and reportedly also the same rate of annual growth expected for the rest of the decade. Investment goods were anticipated to increase 11 per cent in real terms compared to 7 per cent in 1984, a development seen as a sign of renewed confidence in industrial circles. Inflation rates (private consumption deflator) were continuing to fall and were projected at 5.2 per cent for 1985 compared to 6.2 per cent in 1984. As in many other countries or regions, however, unemployment levels still remained high at an average of around 11 per cent of the work force with some of the member countries having more than a 13 per cent unemployment rate. Some analysts did not expect a rapid improvement in that situation, in particular in view of the projected rate of growth in the economy. However, employment was estimated to grow by 0.4 per cent in 1985 and a further 0.5 per cent in 1986.

EXPORTS OF BOVINE MEAT

MARKET SHARES



NOTES:
- Includes fresh, chilled, frozen, cooked, canned and otherwise prepared bovine meat. Excludes carcass weight equivalent of live cattle.
- Includes all countries participating in the Arrangement Regarding Bovine Meat, which account for 90-95 per cent of world exports. Excludes intra-EC trade.

II. INTERNATIONAL SITUATION AND OUTLOOK IN THE BOVINE MEAT SECTOR

(i) Situation

6. In 1985, the bovine meat sector was characterized by a global rise in production, an increase in consumption and a higher volume of trade. However, large availabilities and higher output of all types of meat, coupled with a continuing weak demand in some of the major importing regions were responsible for generally depressed bovine meat prices.

7. In North America, the red meat and livestock sector was strongly affected by large supplies of all types of meat, financial problems in the farm sector and the slowdown in economic growth. Low feedgrain prices boosted poultry meat production, while pigmeat production is estimated to have declined somewhat with pork producers responding to good corn crops, and consequent low corn prices, by retaining their herds. Nevertheless, pork supplies remained at very high levels. Simultaneously, depressed feeder cattle prices pushed producers to delay marketings and slaughter weights rose to record levels, keeping beef production at higher levels than year earlier, in spite of a decline in slaughterings. In South America, the bovine meat sector was affected in a different way by the low level of beef prices both on the internal and on the international markets. Producers, faced with serious economic difficulties and rising costs were forced to sell or slaughter their animals. Consequently, production rose, adding a further downward pressure on prices. Brazil and Argentina clearly illustrated this situation which in the latter résulted in a premature end to herd rebuilding. The exception appeared to be Uruguay where herd liquidation came to an end, production for the domestic market began to decline and internal prices rising somewhat. In Europe, the bovine meat sector is largely dominated by the situation in the European Community, and in 1985 a continuing oversupply situation kept domestic market prices well below the intervention price. Intervention stocks were estimated at 732,000 tons (quantity equivalent to about one year of EC exports at current levels) by year end. Moreover, private stocks were estimated at 50,000 tons. Production, however, declined and should have dropped by some 250,000 tons for the year as a whole. In the Nordic European countries, efforts to reduce beef and veal production through different governmental programmes and schemes continued, but in spite of some encouraging signs, production in most of these countries is still expected to have increased in 1985. In Eastern Europe, the output of beef and veal increased. In the Soviet Union slaughter levels are reported to have increased during the first few months of the year due to some distress slaughter resulting from limited feed supplies. Production consequently increased, and an improved feed situation in the second half of the year seems to have allowed a slight recovery in average slaughter weights, keeping production at higher levels than year earlier. In Oceania, the expectations of higher prices encouraged producers to withhold their cattle from slaughter. The expected price increase in the United States and Canada, Oceania's major markets, began to materialize only in the second half of September. Nevertheless, producer prices in Australia and New Zealand did in fact increase, by an average of some 10 per cent compared to a year earlier (even if some of

the price recovery was due to the devaluations of these countries' currencies against the US dollar during the first half of the year) and production began to rise. Beef and veal production also increased in some major importing Asian countries, such as Japan and the Republic of Korea, and in the Middle East. In Africa, production is believed to have been rising in some countries, including in one major importing country, Egypt.

8. In the light of the high level of bovine meat supplies and generally depressed prices, it might be expected that consumption of beef and veal increased somewhat. Indeed, the analysis of preliminary total consumption data in a number of countries indicates that such an increase took place. This was the case in North America, certain major producing countries in South America, the European Community and the Soviet Union. However, such an analysis may induce wrong conclusions. This was the case for instance for North America. The estimated total consumption increases for 1985 in the United States and Canada were solely due to population growth, while per capita consumption declined in both countries. This was partly related to the slowdown of economic growth, the unemployment situation and health considerations, but the large supplies of competing, lower priced, meats seem to have been the major cause for a drop which in the United States, for example, is estimated at 4 per cent. In some cases per capita beef consumption rose as the result of extremely low prices and this happened for instance in the major traditional exporting countries in South America. Some encouraging signs came, however, from the European Community and the Soviet Union where per capita consumption increased, in the former in response to improved economic conditions and in the latter as a result of rising production. In Oceania, the decline registered in both total and per capita consumption, in the last few years, is believed to have continued in 1985 in spite of increased production. Although this decline was related to the improved export performance, and consequent higher retail prices, it was also, and again, related to the expansion in consumption of other meats.

9. The large availabilities of all types of meat and in particular of bovine meat also had an important impact on trade. Although the volume of trade in bovine meat is expected to have increased in 1985, this seems to have been due more to low prices and exchange rate phenomena than to strengthening demand. In the Middle East, where the continuing drop in oil revenues kept its negative impact on beef import demand, the increased competition in the beef market continued to exert a downward pressure on prices in spite of a possible slight recovery after the first few months of the year. In the Soviet Union, the rise in domestic production was not sufficient to provoke a decline in imported beef demand. However, the Soviet Union is a traditional importer of low priced meat and appears to have been expecting even lower prices before effecting any purchases. Indeed, the USSR signed an agreement last September with the EC for the purchase of 175,000 tons of bovine meat at a very low price. This agreement, which involves about 80 per cent French and 20 per cent West German beef, was followed by a separate agreement signed with Ireland in November, concerning 20,000 tons, also at reduced prices. In another major import region, the Far East, the Republic of Korea imported insignificant quantities of beef in 1985, as a result of large domestic supplies of beef and pork. The positive signs came from Japan where imports continued to rise, and a number of other Asian countries such as Singapore, Taiwan and Hong Kong. However,

competition in this region strengthened with the recent entry into a number of Asian markets of the South American exporters which, with their lower priced product were rapidly increasing their market shares. The EC extended restitutions for beef exports to some countries in the region, but at the time of writing no sales seemed to have taken place. Imports by the United States are estimated to have risen by some 4 per cent, reflecting in particular the high US dollar value compared to its traditional Oceanian suppliers' currencies. Canada, which implemented its import law at the beginning of the year, reduced its beef imports by some 3-4 per cent. In spite of the increased competition in major markets, aggregate exports of bovine meat by the major suppliers are estimated to have risen somewhat, the exception being Uruguay whose sales abroad dropped somewhat, largely due to a decline in domestic production and high local consumption, but also to the strong competition in some of its traditional markets, especially in the Middle East. Another important exporter, Brazil, estimated a decline in exports in 1985 as the result of a strong downturn in its export performance in the second half of the year.

10. As a general comment, it could be noted that 1985 was characterized by an important number of government interventions, in major countries participating in the international bovine meat trade. For the first time, the Canadian authorities implemented their meat import act in order to restrict imports of beef and veal. In Argentina, Brazil and Uruguay, the authorities introduced a number of measures, ranging from buffer stocks to the re-financing of debts, from export credits to taxes, in order to support their countries' beef industries. In the European Community intervention buying was temporarily opened to whole carcasses, private aid schemes were temporarily implemented, and finally, as mentioned above, restitutions were for the first time extended to beef exports to some Asian countries. In the Nordic European countries, different programmes and schemes to reduce beef production are in place, while the growth of beef consumption in Sweden was related to "sell-outs" of beef and pigmeats at reduced retail prices. Other countries put into effect a number of policy measures in 1985, not only in the bovine meat sector, but also in the other meat sectors (see for instance the imposition of countervailing duties by the United States against Canadian exports of live hogs, or the increase of import duties on poultry meat in Saudi Arabia). This increased intervention is perhaps the best illustration of the difficulties through which the meat sector went in 1985.

TABLE I

SELECTED COUNTRIES' TRADE IN BEEF AND VEAL[1/]

A. EXPORTS

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1985/86
Argentina	250	260	+ 4.0	350	+ 34.6
Australia	617	690	+ 11.8	724	+ 4.9
Brazil	479	450	- 6.1	400	- 11.1
Canada	104	114	+ 9.8	111	- 2.6
EC	694	690	- 0.6	660	- 4.3
New Zealand	284	362	+ 27.5	395	+ 9.1
United States	152	158	+ 3.9	172	+ 8.9
Uruguay	144	139	- 3.5	90	- 35.7
Others[3/]	236	250	+ 5.9	226	- 9.6
TOTAL	2,960	3,113	+ 5.2	3,128	+ 0.5

B. IMPORTS

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1985/86
Brazil	37	70	+ 89.1	50[2/]	- 28.6
Canada	116	112	- 3.7	112[2/]	0.0
EC	360	360	- 0.0	370	+ 2.8
Japan	222	235[2/]	+ 5.9	251[2/]	+ 6.8
United States	838	885	+ 5.6	902	+ 1.9
USSR	541[4/]	500	- 7.6	450	- 10.0
Africa[2/]	380	387	+ 1.8	390	+ 0.8
Other Asia[2/]	80	60	- 25.0	63	+ 5.0
Middle East[2/]	365	370	+ 1.4	377	+ 1.9
Eastern Europe[4/]	59	37	- 37.3	35	- 5.4
TOTAL	2,998	3,016	+ 0.6	3,000	- 0.5

[1/] '000 tons carcass weight equivalent, includes fresh, chilled, frozen, cooked, canned and otherwise prepared bovine meat; excludes carcass weight equivalent of live cattle.

[2/] Secretariat estimate

[3/] Includes all other exporting countries participating in the Arrangement Regarding Bovine Meat. Estimates by the secretariat

[4/] Source: USDA Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1985

(ii) Outlook

11. Available projections for 1986 suggest an improved situation when compared with the last two or three years. Nevertheless, taking into account the depressed situation of the bovine meat sector during the previous years, too much optimism would be out of place. Production of beef and veal in a number of major producing countries is expected to decline (European Community, United States, Canada, Argentina, Uruguay) or to remain relatively unchanged. World beef production may decline by 2-3 per cent in 1986. World pork production is expected to continue its upward trend, but at a much lower pace than in 1985 (1 per cent, compared to some 2.3 per cent). The same should occur with production of poultry and sheep meats, which are projected to rise by 2.5 per cent and 1.5 per cent respectively. Consumption of beef and veal is expected to decline by 6.9 per cent in the United States, 3 per cent in Canada and 6.8 per cent in Argentina. However, these important drops would be partially offset by consumption increases in most other major consuming countries. It is interesting to note in this context, that Australia is forecasting a rise in per capita consumption (+1.5 per cent) for the first time in the last four years. World consumption of beef and veal is expected to decline in 1986, but at a lower rate than production. Simultaneously, pork and poultrymeat consumption is forecast to continue its upward trend, but at a slower pace than in 1985, while the intake of sheepmeat should show no major change.

12. In these conditions, it may reasonably be expected that in 1986 some strengthening of the international prices of bovine meat will take place. However, such an increase may well not occur in the first months of the year. Large availabilities of all types of meat, and especially bovine meat, will continue to play a major role, at least in the first half of the year. The high export availabilities in the European Community coupled with a forecast, significant, increase in Argentinian exports and a still high level of Brazilian exports will probably keep a downward pressure on prices in markets such as North Africa and the Middle East, where import demand will continue to largely depend on uncertain oil revenues. Also, in North America, the expected important production declines in 1986 may not immediately be felt, due to the probably continued high level of meat supplies in the market. At this stage, it is difficult to forecast the intentions of the Soviet Union as regards imports of beef and veal. On the one hand, part of the important quantity of beef and veal coming from the European Community, as a result of the above-mentioned agreements, will reach the country only in the first few months of 1986. On the other hand, domestic production is expected to rise further in 1986.

13. In the second half of 1986, the influence of the decline in production of beef and veal and the lower rate in the increase of production of other meats should be felt and prices should begin to rise (indeed, it could be noted that price recovery has already started in some major producing and consuming areas, such as Oceania and North America). Imports are expected to rise in 1986 in the United States and possibly Canada. Japan will continue to increase its imports due to last year's understanding with Australia and the United States, and other Asian countries should also import more, although the Republic of Korea may well remain practically absent from the market again. Imports by the EC are expected to remain

practically unchanged, while it may be assumed that, should prices rise significantly, imports by the Middle East and African countries (some continuously faced with balance-of-payments problems) may decline somewhat for the year as a whole instead of increasing. In 1986, exports by Argentina, Australia, New Zealand and the United States are expected to rise, offsetting declines in the export performance of the European Community, Canada and Uruguay.

14. The following general factors may also have an influence on the bovine meat sector in 1986. The forecast decline in production in an important number of countries would be due more to an expected decrease in cattle numbers than to lower slaughter weights, which in 1985 rose sharply in some cases as a result of low feedgrain prices. This latter factor may continue to have an influence in 1986 as no dramatic changes in these prices are expected. Competition in the Asian markets may well strengthen, not only because of the presence of an increased number of potential suppliers, but also due to the probable continuation of the economic slowdown in the region. The value of the US dollar against other currencies will keep a major role in 1986 and should its recent declining trend continue, the producers of the United States' major suppliers may well see their income fall again. The effects of policy measures in other areas will probably continue to influence significantly the bovine meat sector. In the United States, the new farm bill includes provisions which authorize the Secretary of Agriculture to operate, for an eighteen-month period, a dairy herd buy-out programme. During this period the USDA is required to purchase some 180,000 tons of beef partly for domestic feeding programmes, and partly for exports. In the European Community a new proposed programme to limit milk production could result, by the end of 1986, if adopted, in supplementary slaughterings of some 500,000 cows, the equivalent of 120,000 tons of beef, and the reconversion of some 250,000 dairy cows to breeding cows. Finally, it can also be noted that as a result of the drop in oil revenues, a number of oil-producing countries are seemingly moving from an until recently common practice of barter arrangements (oil against imported items, including meat) to a practice of concessional credit arrangements with trade partners. This practice, which may cause some new difficulties to a number of traditional suppliers of this region, will probably continue in 1986.

Fresh, Chilled and Frozen Beef and Veal Exports of Six Major Beef Exporting Countries (1983-1985), and the Proportion of Each Country's Exports Going to Each Destination[1]

EXPORTER / DESTINATION	AUSTRALIA[2]			EC[3]			ARGENTINA[4]			NEW ZEALAND[5]			URUGUAY[6]			BRAZIL[7]		
	1983	1984	1985[8]	1983	1984	1985[9]	1983	1984	1985[10]	1982/3	1983/4	1984/5[11]	1983	1984	1985[12]	1983	1984	1985[9]
WESTERN EUROPE:	6.7 (1.3)	3.1 (0.8)	4.1 (1.4)	19.4 (4.5)	45.7 (8.1)		45.8 (25.9)	30.6 (36.6)	26.7 (49.4)	2.2 (1.0)	0.5 (0.3)	0.2 (0.1)	23.4 (14.8)	20.0 (21.7)	13.9 (37.8)	59.6 (49.5)	55.8 (48.5)	
of which;																		
EC	5.8 (1.1)	2.8 (0.7)	3.9 (1.3)	-	-		40.5 (22.9)	24.9 (29.8)	23.3 (43.1)	1.7 (0.7)	0.3 (0.2)	0.1 (0.1)	20.4 (12.9)	17.7 (19.2)	11.8 (32.1)	47.1 (39.1)	48.1 (41.8)	
OTHER	0.9 (0.2)	0.3 (0.1)	0.2 (0.1)	19.4 (4.5)	45.7 (8.1)		5.3 (3.0)	5.7 (6.9)	3.4 (6.3)	0.5 (0.3)	0.2 (0.1)	0.1 (0.1)	3.0 (1.9)	2.3 (2.5)	2.1 (5.7)	12.5 (10.4)	7.7 (6.7)	
EASTERN EUROPE:	-	-	-	193.2 (45.2)	131.6 (23.2)		61.4 (34.7)	32.6 (39.0)	-	-	-	-	-	7.9 (8.6)	-	-	-	
of which;																		
USSR	-	-	-	111.9 (26.2)	75.0 (13.2)		59.8 (33.8)	32.6 (39.0)	-	-	-	-	-	7.9 (8.6)	-	-	-	
OTHER	-	-	-	81.3 (19.0)	56.6 (10.0)		1.6 (0.9)	-	-	-	-	-	-	-	-	-	-	
NORTH AMERICA:	283.6 (56.2)	236.4 (61.2)	201.8 (68.4)	12.5 (2.9)	28.5 (5.0)		-	-	-	188.9 (81.1)	150.1 (83.8)	146.5 (85.9)	-	-	-	-	-	
of which;																		
USA	266.7 (52.8)	225.5 (58.4)	186.4 (63.1)	5.0 (1.2)	5.0 (0.9)		-	-	-	163.9 (70.4)	133.9 (74.8)	129.0 (75.7)	-	-	-	-	-	
CANADA	16.9 (3.3)	10.9 (2.8)	15.4 (5.2)	7.5 (1.7)	23.5 (4.2)		-	-	-	25.0 (10.8)	16.2 (9.0)	17.5 (10.3)	-	-	-	-	-	
SOUTH AMERICA	-	-	-	-	-		5.3 (3.0)	5.9 (7.1)	6.1 (11.3)	-	-	-	28.3 (17.9)	28.4 (30.8)	10.8 (29.3)	0.1 (0.1)		
CENTRAL AMERICA AND CARIBBEAN	7.1 (1.4)	6.7 (1.7)	5.6 (1.9)	4.2 (1.0)	4.9 (0.9)		0.4 (0.2)	-	-	3.8 (1.6)	2.5 (1.4)	3.1 (1.8)	-	-	-	-	-	
AFRICA:	-	-		84.6 (19.8)	97.8 (17.3)		6.7 (3.8)	1.1 (1.3)	7.7 (14.2)	0.1 (0.0)	0.1 (0.1)	-	2.7 (1.7)	4.1 (4.5)	-	1.0 (0.8)		
of which;																		
ALGERIA	-	-		24.2 (5.7)	20.5 (3.6)		-	-	-	-	-	-	-	-	-	-	-	
LIBYA	-	-		16.8 (3.9)	9.7 (1.7)		-	-	-	-	-	-	-	-	-	-	-	
WEST AFRICA	- -	- -		36.5 (8.5)	44.0 (7.8)		3.3 (1.9)	1.0 (1.2)	7.5 (13.9)	-	-	-	2.7 (1.7)	4.0 (4.3)	-	1.0 (0.8)	-	
OTHER	-	-		7.1 (1.7)	23.6 (4.2)		3.4 (1.9)	0.1 (0.1)	0.2 (0.4)	0.1 (0.1)	0.1 (0.1)	-	-	0.1 (0.1)	-	-	-	

EXPORTER / DESTINATION	AUSTRALIA[2] 1983	1984	1985[8]	EC[3] 1983	1984	1985[9]	ARGENTINA[4] 1983	1984	1985[10]	NEW ZEALAND[5] 1982/3	1983/4	1984/5[11]	URUGUAY[6] 1983	1984	1985[12]	BRAZIL[7] 1983	1984	1985[9]
MIDDLE EAST:	13.2 (2.6)	3.1 (0.8)	1.7 (0.6)	105.2 (24.6)	239.6 (42.3)		49.5 (28.0)	11.9 (14.3)	10.7 (19.8)	4.4 (1.9)	2.1 (1.2)	1.2 (0.7)	101.3 (64.2)	29.1 (31.6)	9.0 (24.5)	45.2 (37.5)	40.1 (34.9)	
of which;																		
EGYPT	-	-	-	27.2 (6.4)	123.9 (21.9)		20.5 (11.6)	-	-	-	-	-	60.4 (38.3)	12.0 (13.0)	-	10.5 (8.7)	10.9 (9.5)	
ISRAEL	-	-	-	4.1 (1.0)	5.4 (1.0)		20.5 (11.6)	8.2 (9.8)	8.4 (15.5)	-	-	-	8.7 (5.5)	9.6 (10.4)	4.5 (12.2)	0.8 (0.7)	9.1 (7.9)	
SAUDI ARABIA	10.3 (2.0)	1.8 (0.5)	0.7 (0.2)	13.8 (3.2)	25.8 (4.6)		5.0 (2.8)	3.3 (4.0)	2.0 (3.7)	1.8 (0.8)	0.7 (0.4)	0.4 (0.2)	1.5 (1.0)	3.3 (3.6)	2.0 (5.4)	5.8 (4.8)	6.9 (6.0)	
IRAN	-	-	-	32.7 (7.6)	37.7 (6.7)		-	-	-	-	-	-	21.4 (13.6)	4.0 (4.3)	2.1 (5.7)	-	-	
IRAQ	-	-	-	12.4 (2.9)	29.5 (5.2)		-	-	-	-	-	-	9.3 (5.9)	-	-	28.1 (23.4)	13.2 (11.5)	
GULF	2.9 (0.6)	1.3 (0.3)	0.9 (0.3)	8.5 (2.0)	15.3 (2.7)		0.5 (0.3)	0.4 (0.5)	-	2.5 (1.0)	1.4 (0.8)	0.8 (0.5)	-	0.2 (0.2)	-	-	-	
OTHER	-	-	-	6.5 (1.5)	2.0 (0.4)		3.0 (0.7)	-	0.3 (0.6)	-	-	-	-	-	0.4 (1.1)	-	-	
FAR EAST:	189.6 (37.6)	132.2 (34.2)	79.4 (26.9)	1.1 (0.3)	1.6 (0.3)			0.3 (0.4)	0.8 (1.5)	22.9 (9.8)	17.5 (9.8)	12.1 (7.1)	-	2.6 (2.8)	2.7 (7.3)	6.8 (5.7)	4.7 (4.1)	
of which;																		
JAPAN	89.1 (17.6)	93.4 (24.2)	61.0 (20.7)	0.8 (0.2)	1.1 (0.2)		-	-	-	6.5 (2.8)	6.2 (3.5)	5.4 (3.2)	-	-	-	-	-	
REPUBLIC OF KOREA	64.0 (12.7)	19.7 (2.8)	0.1 (0.0)	-	-		-	-	-	-	2.6 (1.5)	1.4 (0.8)	-	-	-	-	-	
TAIWAN	19.8 (3.9)	19.2 (5.0)	13.4 (4.5)	-	-		-	-	-	-	-		-	-	-	-	-	
SINGAPORE	7.4 (1.5)	3.1 (0.8)	0.8 (0.3)	-	-		-	0.3 (0.4)	0.8 (1.5)	-	-		-	0.9 (1.0)	0.9 (2.4)	-	-	
OTHER	9.3 (1.8)	5.8 (1.5)	4.1 (1.4)	0.3 (0.1)	0.5 (0.1)		-	-	-	16.4 (7.1)	8.7 (4.9)	5.3 (3.1)	-	1.7 (1.8)	1.8 (4.9)	6.8 (5.7)	4.7 (4.1)	
OCEANIA	3.4 (0.7)	3.8 (1.0)	2.4 (0.8)	1.8 (0.4)	1.9 (0.3)					10.6 (4.6)	6.3 (3.5)	7.3 (4.3)	-	-	-	-	-	
OTHER	0.6 (0.1)	0.7 (0.2)	0.2 (0.1)	5.7 (1.3)	14.6 (2.6)		8.0 (4.5)	1.1 (1.3)	2.1 (3.9)	-	-	-	2.2 (1.4)	-	0.4 (1.1)	6.6 (5.5)	14.4 (12.5)	
TOTAL	504.4 (100.0)	386.0 (100.0)	295.2 (100.0)	427.7 (100.0)	566.2 (100.0)		177.1 (100.0)	83.5 (100.0)	54.1 (100.0)	232.5 (100.0)	179.1 (100.0)	170.5 (100.0)	157.7 (100.0)	92.1 (100.0)	36.8 (100.0)	120.3 (100.0)	115.0 (100.0)	

[1] The upper number is the quantity of exports (in '000 tons) expressed in product weight. The lower number (in parenthesis) is the percentage of the country's exports accounted for by each destination.

[2] Source: AMLC

[3] Source: Eurostat and GATT

[4] Source: Junta Nacional De Carnes, Argentina (Weekly Bulletin)

[5] Source: The New Zealand Meat Producer (Volumes 13/Numbers 1 and 4)

[6] Source: Instituto Nacional De Carnes, (Estadisticas - Diciembre 1984 y Julio 1985)

[7] Source: GATT

[8] January-August

[9] Not available

[10] January-August

[11] October 1984-June 1985

[12] January-July

[13] Including Morocco, Tunisia, Ivory Coast, Togo, Ghana, Nigeria, Gabon, Congo and Angola.

III. COUNTRY-BY-COUNTRY ANALYSIS

European Community

15. The December 1984 cattle census in the Community showed, at minus 1.2 per cent, a slightly bigger drop in numbers than was previously expected. Cattle numbers totalled 78,486,000 head, the greatest decrease being, as expected, in dairy cow numbers (-3.4 per cent), male cattle (over two years old) (-2.3 per cent), and heifers (two years old and over) other than for slaughter (-2.2 per cent). Available figures indicate that the EC dairy quotas resulted in both a rise of dairy cow slaughter and in a not unsubstantial growth (+4.5 per cent) in beef cow numbers, in particular in Denmark (+9.9 per cent), Federal Republic of Germany (+26 per cent) and France (+7.8 per cent). In view of anticipated continued culling of dairy herds in some member states, it is expected that dairy cow numbers will decrease further before the end of 1985. Total cattle numbers were projected to decrease by 1.0 per cent to 77,700,000 head for the ten member countries by the end of 1985. Counting the two new members, Spain and Portugal, cattle numbers would total some 83,800,000 head.

16. Cattle and calf slaughterings totalled some 29,989,000 head in 1984, an increase of 7.9 per cent compared to year earlier and possibly a record level. A decline is, however, estimated for 1985 with slaughter totalling 28,800,000 head (-4.0 per cent), of which calves 6,900,000 head (-5.6 per cent). The drop in slaughterings is projected to continue well into 1986 for the ten members of the EC, with expectations that cow and heifer slaughter will decrease by 2.8 per cent. An increase in slaughter weights is expected both for 1985 and 1986 and will limit the decline in total beef and veal production to 3.3 per cent and 2.1 per cent respectively. For 1985 beef production is estimated at 6,415,000 tons (-3.2 per cent) and that of veal at 835,000 tons. The higher level of beef production in 1984 and first half of 1985 resulted in record levels of intervention stocks. These stood at 684,608 tons (product weight) at the end of August 1985 compared to 375,755 tons a year earlier (+82.2 per cent). For the end of 1985 it was expected that intervention stocks would total some 732,000 tons, while 50,000 tons would be held in private storage. Consumption of bovine meat in the Community was projected to grow further in 1985 under the influence of improved economic conditions and fairly stable real prices although the high rates of unemployment were likely to have a dampening effect on the consumption growth. Total consumption of beef and veal was forecast at 6,950,000 tons, 2.2 per cent more than year earlier whereas per capita consumption is expected to increase from 25 kg. to 26.6 kg. A further increase in consumption is projected for 1986, moderated, however, by large pork supplies and expected increases in beef prices.

17. Imports of bovine meat (fresh, chilled and frozen) into the Community declined in 1984 and remained at this lower level (around 215,000 tons) in 1985 mainly due to abundant domestic supplies while imports of prepared or preserved bovine meat fell to 145,000 tons (-1.4 per cent). Live animal imports were expected to decrease by some 38,000 head. For 1986 imports of bovine meat are forecast to increase by some 10,000 tons for the ten member countries (i.e. excluding Spain and Portugal). Preferential import quotas in 1985 were the same as year earlier. Exports of beef and veal in 1985 are expected to have remained high in view of the abundant Community

supplies, although dropping slightly compared to the record level in 1984. Total beef and veal exports of some 690,000 tons have been forecast, a drop of 0.6 per cent on year earlier. Sales were sluggish in the first half of the year and although destinations are as yet unavailable, it is known that no sales to the USSR were made. It is likely, however, that a major part of beef sales were to North African countries, of which Egypt is a major market. In September the Community signed an agreement with the USSR for the delivery of 175,000 tons of beef in 1985/86, more than double the volume of 1984. It is likely, however, that only around 125,000 tons were exported before the end of 1985, while the rest would be exported in early 1986. The Community recently extended restitutions for beef exports to ten countries in Asia in a move to help diminish current high stocks. As yet, no sales have been reported to these countries. Exports of beef and veal in 1986 are projected to decrease by some 4.3 per cent, mainly as a consequence of a drop in production and an increase in consumption. Exports of live cattle which in 1985 are estimated to have declined by some 12 per cent, to 350,000 head, are forecast to remain unchanged in 1986.

	1984	Estimates 1985 2/	%Change 1985/84	Forecast 1986	%Change 1986/85
Cattle and calf numbers 1/:	78,486	77,700	- 1.0	..	..
Beef and veal:					
Production	7,499	7,250	- 3.5	7,100 (7,650)	- 2.1 (+ 5.5)
Imports 2/	360	360	0.0	370 (370)	0.0 (+ 2.8)
Consumption	6,800	6,950	+ 2.2	7,000 (7,500)	+ 0.7 (+ 7.9)
Exports 2/	694	690	- 0.6	660 (660)	- 4.3 (- 4.3)

1/ '000 head at 1 December

2/ Includes processed beef and veal.

Note: Figures in parentheses refer to EC-12

Finland

18. Cattle and calf numbers in Finland are expected to have totalled 1,557,000 head in December 1985, a decrease of 2.2 per cent from year earlier. As in the last few years, the decline in dairy cow numbers was largely responsible for the reduction of the herd. The Finnish authorities continued their efforts to curb dairy production and applied a number of policies and schemes to encourage farmers to change from dairy farming to beef production. At the same time, as a result of structural changes, four thousand to five thousand small farms each owning five to ten milk cows go out of business each year, contributing since the late 1960s to the rapid decline in dairy cow numbers. At the beginning of 1985 a compulsory two-price system with individual farm quotas, aimed at accelerating the reduction of the dairy herd, was introduced and some encouraging results seem to have been reached.

19. Inspected cattle slaughter during the first half of 1985 increased by 4.3 per cent compared to year earlier, to 314,700 tons. Although adult male cattle slaughter increased somewhat, rendering the average slaughter weights higher, the reduction of the dairy cow numbers was, and is expected to remain in the near future, the main factor responsible for any cattle slaughter increase (during the first six months of the year slaughterings of cows and heifers rose by some 8 per cent). As a result, production of beef and veal in slaughter houses totalled 63,300 tons from January to June 1985, up by 5.5 per cent from year earlier, and was expected to reach 127,000 tons for the year as a whole, 3.3 per cent more than in 1984. The efforts pursued to curb milk production, with the corresponding reduction of the dairy herd, are expected to begin to have their effects in 1986, and beef and veal production in slaughter houses is forecast to decline to 123,000 tons.

20. The average price received by the producers, 24.39 Marks/kg., increased only marginally in real terms in the first half of 1985, while at the retail level, average prices at 43.05 Marks/kg. rose more significantly (1 to 1.5 per cent). In spite of similar increases in the price of competing meats, their more attractive relative price apparently played an important role and while the consumption of beef and veal declined by some 4.2 per cent during this period to about 51,100 tons, (or 10.4 kg. per capita), pigmeat consumption rose by 5.3 per cent, to 75,300 tons (or 15.4 kg. per capita). Total beef and veal consumption is expected to have declined by some 2.6 per cent, to 102,000 tons for the year as a whole (excluding meat from farm slaughterings), while pigmeat consumption is forecast to rise by some 2 per cent, to 153,000 tons. It is expected that these trends will continue in 1986.

21. As a consequence of rising production and declining consumption, exports of beef and veal rose sharply from January to June 1985, reaching some 13,000 tons, about two thirds of Finland's overall beef exports in 1984. For the year as a whole it was expected that exports would reach a record level of 22,000 tons, up by 16 per cent from year earlier. Bovine meat exports continue to go almost exclusively to the Soviet Union. In view of expected production decreases, exports should decline somewhat in 1986.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1985/86
Cattle and calf numbers[1/]:	1,592	1,557	- 2.2	1,530	- 1.7
Beef and veal[2/]:					
Production[3/]	124	128	+ 1.1	127	- 0.8
Consumption	106	102	- 3.7	102	0.0
Exports	19	22	+ 15.8	20	- 9.1

[1/] '000 head, 1 December [2/] '000 tons

[3/] Includes production from animals slaughtered both in slaughter houses and on farms.

Sweden

22. At the latest cattle census in June 1985, cattle and calves totalled 1,845,000 head, 1.8 per cent less than year earlier and the fourth consecutive annual decrease. As in previous years all categories of cattle diminished. The last few years of cattle decreases are in line with Government policy to reduce production of beef and veal. By June 1986 it is projected that the number of cattle and calves will have been reduced by 7.4 per cent compared to the latest peak in 1981. As a result of the introduction of a two-price system for milk on 1 July 1985, a stronger decrease of dairy cow numbers is expected, currently forecast at minus 3.7 per cent for 1986, while total cattle and calf numbers are projected to decline by 2.7 per cent. Although a slowdown in slaughter rates was apparent in the first six months of 1985 (-2.3 per cent) it is expected that total slaughter for the year will have increased by 2.9 per cent to 720,000 head before decreasing to 710,000 head in 1986. Calf slaughter increased to a record level of 134,000 head (+8.9 per cent) as a result of the recently introduced Government programme giving a premium on slaughterings of heifer calves in order to further the reduction of surplus production. This increase did not entail a higher production of veal as average dressed slaughter weights declined. Thus, beef and veal production showed only a marginal increase (0.6 per cent) in 1985 compared to 1984, totalling 156,000 tons. For 1986, a small decline in beef production is projected and a more substantial, 18.2 per cent, increase in veal production, resulting in a forecast total beef and veal production of the same magnitude as in 1985.

23. Consumption of bovine meat in Sweden has trended downwards since 1976, both totally and on a per capita basis. There are several reasons for this, among which one finds competition from other meats (in particular pork, for which Swedes have a preference), abolition of consumer subsidies and consequent price rises, economic situation and possibly also health reasons. However, 1985 appeared to have been a turning-point since in the first three quarters of the year consumption of beef and veal increased by 2 per cent. For the year as a whole an increase of 3.8 per cent, to 137,000 tons has been forecast. The growth in beef consumption was due, at least partly, to consumption campaigns by "sell-outs" of beef and pigmeats at reduced retail prices (-13/-14 per cent). The long-term objective of these consumption campaigns are said to be an increase in consumption of at least 10 per cent. Another reason for the growth is the moderate, 2 per cent, increase in average beef retail prices during the first nine months of the year and even a decrease in the second quarter compared to price increases in recent years, in particular compared to those for pigmeat which in the past have often been less steep than those of beef. Beef and veal consumption is expected to continue growing another 2.2 per cent in 1986, to 140,000 tons (16.8 kg./capita). After a 28.9 per cent drop in 1984, imports of beef and veal increased some 37 per cent, to 3,700 tons, in the first six months of 1985. Most of the beef was imported frozen and came primarily from Poland and Yugoslavia. For the whole year it has been forecast that beef and veal imports would reach 6,500 tons, 20.4 per cent more than year earlier. Exports of beef and veal reached some 25,300 tons (preliminary figure) in the first ten months of 1985, 26.5 per cent more than year earlier. Around 20 countries purchased Swedish beef, among them Italy, Venezuela, Taiwan and the United States. It could be noted that the USSR and the Republic

of Korea, which in past years have bought beef from Sweden, have not bought anything from that country so far in 1985. However, a five-year agreement, beginning in 1986, for the provision of 5,000 tons of beef per year by Sweden to the Soviet Union, was recently signed between the two countries. Exports of beef and veal in 1985 were expected to reach 26,000 tons, 9.7 per cent more than year earlier. A further increase is projected for 1986.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
Cattle and calf numbers[1/]:	1,878	1,845	- 1.8	1,796	- 2.7
Beef and veal[2/]:					
Production	155	156	+ 0.6	156	0.0
Imports	5.4	6.5	+ 20.4	6.5	0.0
Consumption	132	137	+ 3.8	140	+ 2.2
Exports	23.7	26.0	+ 9.7	28.0	+ 7.7

[1/] '000 head, June

[2/] '000 tons

Norway

24. Contrary to earlier expectations, preliminary figures from the latest census (June 1985) suggest that herd liquidation, which began in 1982, has come to an end. Indeed, total cattle and calf numbers increased by 0.9 per cent to 973,000 head although cow numbers declined by 1.5 per cent. After two years fall in calf numbers, due to the premiums given for calf slaughter in order to reduce meat production, calf numbers increased in 1985 by 2.4 per cent indicating an end to production reductions since it is considered that a certain balance has been restored to the market. Indeed, in January 1985 the carcass weight limit was abolished and in mid-September the premium for slaughter of male calves was stopped. Consequently, it may be presumed that cattle numbers will continue to increase at a modest pace in 1986. Cattle slaughter increased by some 3.2 per cent in the first half of 1985, totalling 193,000 head at average weights slightly above those of year earlier. For the year as a whole it is expected that 370,000 animals will have been slaughtered, a rise of 0.5 per cent on year earlier. In 1986, slaughter would fall by around 4.3 per cent, confirming that herd rebuilding will be continued. Production of beef and veal in the first half of 1985 totalled 36,300 tons, some 5.2 per cent more than year earlier, in part because of higher slaughter rates and partly due to heavier slaughter weights. For the year as a whole, production is expected to have reached 71,900 tons (+4.1 per cent). A further increase is forecast for 1986. Consumption of beef and veal in 1985 was expected to reach 74,000 tons, 3.5 per cent above that of year earlier, leaving a deficit compared to production of some 2,100 tons, some of which would have been covered by imports and some by stocks. The

increase was due partly to a rise in net income and partly to consumption campaigns. Forecasts for 1986 suggest that Norway will again consume more than it produces, indicating that some imports will be needed.

25. Norway traditionally imports only small quantities of beef and veal, being largely self-sufficient and aiming at a supply-demand balance. In the first half of 1985 some 900 tons (product weight) of beef and veal were imported, compared to 1,700 tons for the whole of 1984. The principal suppliers were Sweden, Ireland, Yugoslavia and Denmark. Most of the beef was imported frozen. For the year as a whole, imports of around 1,000 tons were expected, a volume that is likely to be imported also in 1986.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
Cattle and calf numbers[1/]:	964	973	+ 0.9	..	..
Beef and veal[2/]:					
Production	69.1	71.9	+ 4.1	73.3	+ 1.9
Consumption	71.5	74.0	+ 3.5	75.0	+ 1.3
Imports	1.7	1.0	- 41.2	1.0	0.0

1/ '000 head, 20 June

2/ '000 tons

Switzerland

26. According to the April 1985 cattle census, and after an increase in 1984 due to very good fodder conditions, cattle numbers continued the downward trend started in 1980, totalling 1,926,200 head, a decrease of 0.9 per cent compared to year earlier. Beef cows decreased by 9.7 per cent whereas beef heifers rose by 2.2 per cent. The April 1986 census is projected to show a further small decrease in numbers, partly because of a continued fall in dairy cow numbers. Slaughter increased by some 5.2 per cent in the first half of 1985 compared to the same period in 1984, totalling 436,200 head. Calf slaughter decreased whereas that of other categories increased. In view of expected losses in the April 1986 cattle inventory and projected production levels, it could be presumed that slaughter increased further in the second half of the year and be higher than year before for the year as a whole. Production of beef totalled 68,700 tons in the first six months of the year, a gain of 11.5 per cent compared to year earlier. The discrepancy between the percentage increase in slaughter and that in production is explained by the rise in average slaughter weights. Veal production for the same period remained virtually stable. For 1985 as a whole, beef and veal production was expected to grow by some 3.5 per cent, before falling again in 1986.

27. The increase in production incited the Government to no longer support producer prices at the level of indicative prices, which resulted in a 10 per cent fall in market prices of steers and heifers under that of the indicative price. After a peak in the third quarter of 1984, beef retail prices have trended downwards under the influence of abundant supplies, whereas pork prices fluctuated during the same period and were on average higher than beef prices. Thus, consumption of beef and veal increased by some 5.5 per cent in the first half of 1985, totalling 90,400 tons. A rise in consumption of 4.6 per cent is projected for the year as a whole, putting the volume at 181,000 tons. This would be due to decreases in retail prices of beef and increases in those of pork. In view of the unusually high level of supplies still in stock at the time of writing and the apparent difficulties of selling those, it may be expected that these will have had a moderating influence on prices for the rest of 1985 and possible also for the first few months of 1986. Imports of beef and veal in the first six months of the year decreased by some 40.0 per cent compared to year earlier, totalling 4,600 tons. The drop was due to ample domestic supplies during the period. For 1985 as a whole imports were expected to reach some 10,000 tons, 27 per cent below that of 1984. An increase is, however, projected for 1986 in view of anticipated lower production levels. Switzerland, a traditional importing country of 10-15 per cent of its beef needs, has recently been induced to advance funds in order to dispose of some quantities of the excess supplies. Very little of available stocks, 830 tons out of 11,300 in the first six months of 1985, was exported. The first funds made available were to facilitate the exportation of 670 tons of beef. Subsequently, more funds to rid the market of at least part of the excess supplies (by stocking operations) were made available on two occasions, more than tripling the original funding.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
Cattle and calf numbers[1/]:	1,943	1,926	- 0.9	1,920	- 0.3
Beef and veal[2/]:					
Production	165	171	+ 3.6	169	- 1.2
Consumption	173	181	+ 4.6	179	- 1.1
Imports	13.7	10	- 27.0	12	+ 20.0

[1/] '000 head, 21 April

[2/] '000 tons

Yugoslavia

28. Cattle and calf numbers in Yugoslavia, which have been declining virtually since 1975, fell again in 1984. The decline registered that year was of some 2.7 per cent, numbers having totalled 5,199,000 head, and was due to a drop in the numbers of all categories of cattle. Continuing adverse weather conditions, the high price of maize on the domestic market, and, recently, the declining trend in per capita beef consumption (provoked by a difficult economic situation and high inflation rates, but also by lower priced competing meats, especially

pigmeat and poultrymeat) seem to partly explain this trend. However, the continuing trend of rising producer prices suggests that the producers situation is not as delicate as the downward trend in cattle numbers indicates.

29. Cattle slaughterings totalled 2,402,000 head in 1984, up by 5.2 per cent from year earlier. As a result, beef production went up by about 4 per cent, to 371,000 tons. Thus Yugoslavia, a traditional importer and exporter of bovine meat, was able to sharply reduce its import level and slightly increase exports. The reduction of imports, which occured especially in the second half of the year, was of some 44 per cent, to 23,700 tons, while total beef exports increased by about 2.4 per cent to 42,000 tons. This trend continued during the first half of 1985, when imports fell by as much as 67 per cent compared to year earlier, and exports almost doubled to 34,800 tons. The European Community continued to be Yugoslavia's major beef market and exports to it reached 17,500 tons during this period, compared to 7,900 tons a year earlier.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1985/86
Cattle and calf numbers[1/]:	5,341	5,199	- 2.7	..	..
Beef and Veal[2/]:					
Production	371	..	..	..	..
Consumption	337	..	..	..	..
Imports	24	5.2[3/]	- 67.5[3/]	..	..
Exports	42	34.8[3/]	+ 93.3[3/]	..	..

[1/] '000 head, 15 January

[2/] '000 tons

[3/] January-June

Bulgaria

30. Cattle and calf numbers have been decreasing in Bulgaria since 1983, totalling some 1,778,000 head in 1984, a drop of 0.3 per cent compared to year earlier. It is expected that herd liquidation will have come to an end in 1985 and that numbers will soon show an increase. Beef and veal production reached a record level in 1984 with 0.6 per cent more than year earlier. As is normally the case in Bulgaria, around three quarters of the output was that of veal. In the first half of 1985, however, bovine meat production dropped drastically, totalling 45,585 tons (-8.9 per cent), beef production falling more (-11.9 per cent) than that of veal (-7.3 per cent). It is likely that there was some recovery during the second half of the year but that total production of bovine meat for the year stayed below the previous year's record level. Bulgaria is a traditional exporter of bovine meat and in particular of so called "baby-beef". In 1984 a total of 12,500 tons was exported, more than half of which in frozen form. In the first half of 1985, exports fell dramatically to only 924 tons (-83.5 per cent)

compared to 5,607 tons in the same period a year earlier. All bovine meat exported was fresh or chilled. The reason for the decrease would seem to be mainly the production shortfall in the first six months of the year. For the year as a whole, it is probable that there was a substantial decline in beef and veal exports although some recovery in the second half of the year is likely to have occurred. Bulgaria's main customers are countries in the Middle East, in particular Jordan. Bulgaria traditionally also exports live animals and in 1984 some 24,500 head was exported. In the first half of 1985 a sharp drop was reported, exports totalling only 4,400 head compared to 13,600 head a year earlier.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
Cattle and calf numbers[1]:	1,778	1,780[3]	+ 0.1	1,781[3]	+ 0.1
Beef and veal[2]:					
Production	111	109[3]	- 1.8	110[3]	+ 0.9
Consumption	98.5[3]	103[3]	+ 4.6	103[3]	0.0
Exports	12.5	6[3]	- 52.0	7.0	+ 16.7

[1] '000 head

[2] '000 tons

[3] Secretariat estimates

Hungary

31. The declining trend registered in the Hungarian cattle herd since 1979 may have come to an end in anticipation of some price improvement to be introduced on 1 January 1986. At an estimated 1,901,000 head in January 1985 the decline, compared to year earlier, was of only 0.3 per cent and it is expected that by January 1986, cattle and calf numbers will total 1,909,000 head. During the first half of 1985, cattle slaughter rose by some 14.4 per cent compared to year earlier, to 189,300 head. This increase seems to be due to a rise in adult male cattle slaughter. It is consequently difficult to explain that total average carcass weights appeared to have decreased somewhat and that beef and veal production is indicated to have remained stable during this period (at 53,600 tons), when an increase of both carcass weights and production might have been expected. At the time of writing there was no data available for 1985 as concerns beef consumption. However, taking into account the declining trend registered in the last few years and the sharp drop in imports reported for the first half of the year, it may be assumed that this declining trend was not reversed. Indeed, unofficial sources suggest a consumption drop of some 6 per cent in 1985. Pigmeat consumption, by far the preferred type of meat of the Hungarian consumer in spite of a price 40 per cent higher than that of beef, is estimated to have remained at the same level as in 1984, i.e. 457,100 tons, or 42.8 kg. per capita. Poultry meat consumption is expected to have increased further from its 222,500 tons (20.9 kg. per capita) level of 1984.

32. From January to June 1985, beef and veal imports declined sharply to a mere 100 tons, compared to 4,500 tons a year earlier. Imports of live cattle, all coming from Poland, also fell substantially to 13,600 head, a drop of 69 per cent. This seems to be due more to a decline in domestic consumption and exports than to a potential increase in production. Beef and veal exports dropped by 15.5 per cent to 18,600 tons during the same period. Virtually all exports of frozen beef and veal traditionally go to the Soviet Union which from January to June 1985 imported 31 per cent less beef from Hungary than year earlier. The other types of beef (which represented during this period about 35 per cent of the Hungarian beef exports) went to the European Community. Hungary is an important exporter of live cattle especially to the Middle East (Libya and Lebanon), the Soviet Union and Italy. During the first half of the year, exports totalled 79,100 head, 9,500 head less than year earlier, a decline largely due to a sharp reduction in exports to the Soviet Union.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1985/86
Cattle and calf numbers[1]:	1,907	1,901[2]	- 0.3[2]	1,909	+ 0.4
Beef and veal[3]:					
Production	130	54[4]	+ 0.4[4]	..	..
Consumption	74	70[2]	- 6.0[2]	..	..
Imports	7	- [4]	- 97.8[4]	..	..
Exports	56	19[4]	- 15.5[4]	..	..

[1] '000 head, 1 January

[2] USDA estimates - Dairy, Livestock and Poultry, World Livestock and Poultry Situation September 1985

[3] '000 tons

[4] January - June

Poland

33. After three years of declining numbers, the Polish cattle herd may, at 11,055,000 head in June 1985 (1.3 per cent less than year earlier) have reached a turning point. In fact, the return to more normal crops with resulting improved domestic supplies of fodder since mid-1984 has allowed the decline in cattle numbers to slow down since 1984, and it is expected that the June 1986 census will show an increase in cattle numbers of some 3 per cent. Female cattle represents about 60 per cent of total herd, and is entirely for dairy purposes. This relatively large number of cows and heifers is mainly due to comparatively high prices received by farmers from milk sales. Although no data are as yet available for slaughter numbers in 1985, it is estimated that cattle slaughter increased somewhat compared to the 1984 level of 4,654,000 head. Beef and veal production, which in 1984 totalled 650,000 tons, is estimated to have risen by some 2 per cent in 1985 partly as a result of the increased slaughter levels, but essentially due to higher average carcass weights resulting from improved fodder availabilities.

34. Meat rationing continued in Poland in 1985 and it is not expected that beef consumption will show any dramatic change compared to the 585,000 tons consumed in 1984. It is not yet possible to discern the impact that the government's increase in beef retail prices (about +29 per cent on average as from 1 July 1985) has had on consumption. In 1984 a measure of the same type did not apparently prevent beef consumption from increasing somewhat, suggesting that bovine meat demand in Poland largely surpasses present supply. Nevertheless, and in spite of prices on average almost twice as high as those of beef and veal, the Polish consumer preference largely goes to pigmeat, the per capita consumption of which averages at present some 28 kg. per year, against some 16 kg. for beef and veal. Reflecting improved production conditions of all meats, imports of beef are forecast at 3,800 tons in 1985, about 10,000 tons less than year earlier and at 15,000 tons in 1986. Imports of pigmeat were also expected to have dropped sharply, from a level of 105,000 tons in 1984, to only 44,000 tons in the 1985. This strong decline seems to indicate that the adjustment process experienced in recent years by the pigmeat sector in Poland has come to an end, the increase in pigmeat production (some 11 per cent in 1985) reflecting a steady rise in pork prices established by the Government.

35. As a result of the importance granted by the Polish authorities to foreign currency earnings from exports, the efforts to increase beef exports continue and for 1985 it is anticipated that exports will have risen by some 3,000 tons to 14,200 tons. The EC is Poland's major market for fresh and chilled beef, followed by Sweden. More important than beef and veal exports are those of live cattle which are expected to have totalled 224,000 head in 1985, down by some 22.8 per cent compared to year earlier. The major market for live cattle has traditionally been Italy which imports expecially cattle for fattening and calves. Pigmeat exports (which include mostly processed meats, such as hams, shoulders, meat preserves and sausages) are also estimated to have increased to some 93,000 tons, 5.7 per cent more than year earlier. Projections for 1986 indicate an increase of some 6 per cent in the export level of bovine meat.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1985/86
Cattle and calf numbers[1/]:	11,197	11,055[2/]	- 1.3	11,400	+ 3.1
Beef and veal[3/]:					
Production	650	663	+ 2.0	..	..
Consumption	585	585	0.0	..	..
Imports	14	4	- 73.6	2	- 60.5
Exports[4/]	12	14	+ 23.5	15	+ 5.6

[1/] '000 head, June

[2/] Actual

[3/] '000 tons

Soviet Union

36. Cattle and calf numbers on state and collective farms in the Soviet Union totalled 95,400,000 head on 1 October 1985, a decrease of 0.3 per cent compared to year earlier. Pig, sheep and goat numbers also diminished. End of year cattle inventories were expected to show a decline in numbers due to heavy slaughterings during the year. Production of slaughter animals increased in the first four months of 1985 for all categories: bovine animals by 7.1 per cent to 3,568,000 tons (live weight); pigs by 4.8 per cent to 1,514,000 tons; sheep and goats by 0.7 per cent to 139,000 tons and poultry by 7.9 per cent to 734,000 tons. Total production of slaughter animals increased 6.4 per cent, providing 5,955,000 tons compared to 5,595,000 tons (live weight) in 1984. The rise was due to some distress slaughter as a result of limited feed supplies, a situation which improved in the second half of the year.

37. As the result of favourable summer pasture conditions, total meat production from state and collective farms in the first nine months of the year reached 13,441,000 tons, an increase of 3 per cent on year earlier, according to official figures. Of total production bovine meat accounted for 7,570,000 tons, 4 per cent more than year earlier; pork 3,365,000 tons (+1 per cent); poultry 1,739,000 tons (+6.6 per cent) and sheep and goats 767,000 tons (-5 per cent). Production of bovine meat for the year is estimated to have increased by 2-3 per cent, while overall meat production may have risen by some 1.5 per cent.

38. Higher levels of domestic production are likely to have resulted in lower total meat imports in 1985. According to some estimates they may have decreased by around 4.3 per cent to 770,000 tons. Beef imports would have declined by 7.6 per cent to around 580,000 tons; pork imports would have risen to 120,000 tons (+20 per cent); poultry imports would have declined to around 100,000 tons (-12.3 per cent); while those of mutton, lamb and goat meat would have remained at the same level as in 1985 (50,000 tons). Around 125,000 tons of the imported beef would have come from the European Community, notably France. The Community has signed a contract for delivery of 175,000 tons of beef from intervention stocks, of which some 125,000 tons were to be exported before the end of 1985 and the rest at the beginning of 1986. In 1986, imports of beef are forecast at 450,000 tons, a decline of 10 per cent, due essentially to expected higher domestic production levels.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
Cattle and calf numbers 1/:	119,558	120,800	+ 1.0	120,400	- 0.3
Beef and veal 2/:					
Production 3/	7,200	7,400	+ 7.2	7,500	+ 1.4
Consumption	7,714	7,870	+ 2.0	7,915	+ 0.6
Imports	541	500	- 7.6	450	- 10.0

1/ '000 head, January 2/ '000 tons 3/ Includes slaughter fats

Note: The figures in the table are USDA estimates since official figures are available only for production and for part of the year and are as yet unconfirmed.

Tunisia

39. Cattle and calf numbers in Tunisia totalled 637,000 head in 1985, up by 3.6 per cent from year earlier. The rebuilding of the cattle herd started in 1983 and is expected to continue in 1986, when total numbers are forecast at 660,600 head. The herd rebuilding was also illustrated in 1984 by declining slaughter levels, which fell by some 9 per cent. However, total slaughter levels in 1985 may well have risen, but this would have been due to an important increase in the percentage of adult male cattle in the slaughter mix. Heifer and cow slaughterings seem to have declined significantly. As a consequence of the rise in adult male cattle slaughterings, and of higher slaughter weights, production of beef in 1985 in Tunisia is estimated to have risen by some 9 per cent, to 32,000 tons, a further increase of about 8 per cent being projected for 1986.

40. Although per capita beef consumption decreased by some 1.7 per cent in 1985, total consumption remained relatively stable and exceeds largely domestic output. In these conditions, Tunisia remained a net importer of beef, even if its higher production allowed a reduction of some 7,000 tons in imports, including carcass weight equivalent of live cattle. This decline in total import levels was virtually all due to a reduction of about 50 per cent in the import level of live animals (excluding imports of cattle for breeding purposes) most of which from Tunisia's traditional major supplier of live cattle, the Federal Republic of Germany. In 1986, bovine meat imports (including carcass weight equivalent of live animals) are expected to decline further, to some 17,700 tons, especially as the result of a drop in the imports of fresh, chilled and frozen beef.

41. Producer prices in 1985 were established by the Government at 2,300 dinars/kg. (up by 15 per cent compared to year earlier), while consumer prices are subject to a stabilization scheme through the action of the General Compensation Fund and to import levels considered necessary to restrain price rises. In 1985 consumer prices for categories 2 and 3 were fixed at 1,700 dinars/kg. and 1,400 dinars/kg., respectively.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1985/86
Cattle numbers[1/]:	615	637	+ 3.6	661	+ 3.7
Beef[2/]:					
Production	29.4	32.0	+ 8.8	34.7	+ 8.4
Consumption	59	59.2	+ 0.4	59.5	+ 0.4
Imports	15.2	14.6	- 3.8	11.7	- 19.9

[1/] '000 head

[2/] '000 tons

South Africa

42. The effects of the recent droughts in South Africa affected cattle numbers also in 1985. Indeed, instead of the increase expected earlier, and according to the August 1985 cattle census, cattle and calf numbers totalled 7,830,000 head, a drop of 1.2 per cent compared to 1984 and the

lowest level since 1969. Cattle herd rebuilding is now expected to begin in 1986, when an increase of 1.3 per cent is anticipated. Slaughter levels in the first six months of 1985 continued at higher than usual levels, although a slight decrease (-0.3 per cent) was apparent as well as a reduction in average dressed weights (-1.5 per cent). For the year as a whole inspected cattle and calf slaughter was estimated to have dropped some 0.8 per cent to 2,440,000 head but with a minor increase (0.1 percent) in average weights. A further 2.1 per cent decrease in slaughter is projected for 1986. Production of beef and veal is expected to have increased some 2.8 per cent in 1985 to 680,000 tons, due undoubtedly to the slight increase in weights and small changes in the slaughter mix. Another production increase of 2.3 per cent is projected for 1986, in spite of anticipated lower slaughter levels and the same dressed weights.

43. Beef and veal consumption in South Africa reached 721,000 tons in 1985, the highest level ever and 5.6 per cent more than year earlier. Per capita consumption increased by about 2.6 per cent to 21.4 kg. A further increase in total consumption is forecast for 1986. In the first six months of 1985 retail prices of beef rose by 2.6 per cent, from 6.20 rand per kg. in the first quarter, (up from 5,79 rand in the last quarter of 1984), to 6.36 rand in the second quarter of the year. Meanwhile guaranteed minimum prices to producers remained unchanged while pork prices declined some 2.4 per cent in the second quarter. The consumption increases which are estimated to have occurred in 1985, were due to ample supplies, an increase in disposable income and only modest price increases in nominal terms as well as a decrease in the price level in real terms. Also, various schemes were used throughout the year to dispose of the high beef stocks on the domestic market, which led to the price differential with competing meats being reduced, thus favouring the beef intake.

44. Imports of beef and veal in 1985 totalled 23,500 tons, 6.4 per cent below those of year earlier. Most of these imports were frozen and originated in neighbouring countries. Besides beef, South Africa also imports live animals, estimated at 120,000 head in 1985, 6.2 per cent more than in 1984. For 1986 imports of beef and veal are projected to decline by 4.3 per cent. Due to the drought conditions prevailing in the country in recent years, South Africa accumulated unusually large stocks which at the end of the second quarter of 1985 stood at 38,000 tons. The various schemes referred to above have allowed to date the absorption of some 16,000 tons by the domestic market.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
Cattle and calf numbers[1/]:	7,923	7,830	- 1.0	7,945	+ 1.3
Beef and veal[2/]:					
Production	662	680	+ 2.8	696	+ 2.3
Consumption	682	721	+ 5.6	734	+ 1.8
Imports	25.1	23.5	- 6.4	22.5	- 4.3

1/ '000 head, August 2/ '000 tons

Argentina

45. The rebuilding of cattle herds initiated in 1983 in Argentina has come to a premature end. Cattle and calf numbers, initially forecast at 55,000,000 head, totalled only 54,000,000 head in June 1985, down by 1.1 per cent compared to year earlier. Furthermore, it is now projected that numbers will show a new decline in 1986 to some 53,500,000 head. The reasons for this situation are various, but among the most important ones appear the highly depressed prices in the domestic market, which in the second quarter of the year fell to historical lows. Producers, faced with serious economic difficulties and growing costs, seem to have reacted to such prices by selling and/or slaughtering their animals. Argentina was also faced with difficulties in its export sector as prices in the international market remained relatively low and, indeed, in some cases hardly met production costs. In order to support its stabilization programme against inflation, the Argentinian Government fixed maximum prices for cattle (0.34A/kg. for steers, 0.33A/kg. for calves and heifers, 0.28A/kg. for cows and 0.26A/kg. for bulls). At the moment of writing it is difficult to assess the impact on cattle numbers that the serious recent floods in Argentina may have had, although a figure of 350,000 head lost has been advanced.

46. As a result of the above-mentioned factors cattle and calf slaughter increased and from January to November 1985, inspected slaughter totalled 9,394,000 head, up by 11 per cent compared to year earlier. For the year as a whole total slaughter is estimated at 13,800,000 head, an increase of some 12 per cent. From January to November, female cattle and calf slaughterings increased, compared to year earlier, to abnormally high levels, confirming that herd rebuilding has been interrupted. Consequently, the average weight of slaughter animals declined. However, as a result of higher total slaughterings, production of beef and veal is expected to have increased by about 8 per cent in 1985, to 2,760,000 tons.

47. The expanded domestic supply was also keeping a downward pressure on prices. This fact, added to the price freeze imposed by the Government last June, and low export levels, allowed consumption to rise and, for the year as a whole, consumption is expected to have reached a record 2,500,000 tons, up by 7 per cent from 1984. In terms of per capita consumption this means 82 kg., the highest level since 1981. Simultaneously, the consumption of competing meats (which account for about 20 per cent of total meat intake - the most competitive one now being poultry) is expected to decline somewhat.

48. Beef and veal exports increased by 2.1 per cent, to 218,600 tons, between January and October 1985. This was due to strongly increased exports in August, September and October. During these three months, exports were 65 per cent higher than year earlier and the United States, the European Community, Angola and Israel absorbed the major part of the increase. It was expected that for the year as a whole exports would rise by some 4 per cent, to 260,000 tons. In comparison to historical standards this is a relatively low level, and some 100,000 tons below Argentina's best export years. However, a substantial export recovery is projected for 1986. Weak demand in its traditional markets and ample export availabilities in the EC continued to influence Argentinian exports especially to the Middle East. Difficulties reportedly emerged in markets such as Iran, Irak and Egypt where prices were often at a level which hardly covered production and export costs. Turkey appeared to be interested in buying some 30,000 tons of Argentinian beef, but problems related to the low price required by the Turks were said to have

emerged. After the expiration in May 1985 of the three-year agreement on beef sales to Israel, a new one-year agreement was reached according to which Argentina would sell 4,600 tons to this country. One of the major factors with a negative impact on the export sector is undoubtedly the total absence of sales to the Soviet Union since August 1984, in spite of an agreement signed in 1981 which expired at the end of 1985, under which this country undertook to import yearly a minimum of 60,000 tons of beef from Argentina.

49. In addition to these export difficulties the beef industry was faced with serious internal problems and in order to alleviate these, the Argentine authorities recently launched an industry support programme. The re-financing of debts, additional financial support and the implementation of export programmes aiming at the placement of minimum export volumes are some of the major measures announced by the programme. A new tariff treatment for exports of meat offals and sub-products were also introduced in June 1985.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1985/86
Cattle and calf numbers[1/]:	54,600	54,000[2/]	- 1.1	53,500	- 0.9
Beef and Veal:					
Production[3/]	2,558	2,760	+ 7.9	2,680	- 2.9
Consumption	2,338	2,500	+ 6.9	2,330	- 6.8
Exports	250	260	+ 4.0	350	+ 34.6

[1/] '000 head, 30 June

[2/] Actual

[3/] '000 tons

Brazil

50. Cattle and calf numbers in Brazil are estimated to increase on average 3 per cent each year. In 1985, a 2.9 per cent increase is estimated to have occurred to 136,641,000 head. Total cattle and calf slaughter has been estimated at some 10,100,000 head, about the same level as year earlier, as the strong rise in slaughterings during the first half of the year was offset by sharp declines in the second half. Production has therefore been estimated at some 2,200,000 tons, up by some 2 per cent. A persistent drought in the states of Sao Paulo and Paraná is said to have already provoked the death of some 500,000 cows, slowing down the rise in cattle numbers.

51. During the first half of 1985, producer prices declined by some 40 per cent. As in other South American countries, producers faced with economic difficulties were forced to sell or slaughter higher quantities of cattle in order to cope with increased costs and inflation. However, in the second half of the year, rumours concerning beef stocks held by

the Government, reinforced by the above-mentioned adverse weather conditions, encouraged strong market speculation, and prices (both at the wholesale and retail levels) increased by almost 200 per cent. As a consequence, the Brazilian authorities decided in October 1985 to import 15,000 tons of beef from Uruguay before the end of the year, in order to put an end to this speculation. Beef consumption which at 14.0 kg. per capita is among the lowest, if not the lowest, in South America was expected to rise. Rising prices of both pigmeat and poultrymeat, as well as improved salaries in certain economic sectors, are factors expected to benefit beef consumption. Also, beef prices have been subject to a control policy of fixed prices since October 1985, a factor which may also favour consumption.

52. Until June 1985 imports of beef totalled 12,800 tons. In July, the Brazilian authorities authorized the importation of 50,000 tons of beef for processing from Brazil's traditional supplier, Uruguay. Also, as already mentioned, the authorities decided on the importation of 15,000 tons more for the domestic market in October. These importations were linked to the off-season requirements of the internal market and the export efforts developed by Brazil and some 65,000 tons to 70,000 tons should have entered the country by the end of the year. During the first eight months of 1985 Brazilian beef exports totalled 328,000 tons. Exports of frozen boneless beef (some 31 per cent of total exports) were stimulated by a rising trend in average export prices for fresh, chilled and frozen beef in Brazil's major markets (Irak, United Kingdom and the Federal Republic of Germany). Canned meat exports represented 55 per cent of exports and major markets were the United Kingdom and the United States. With some 450,000 tons of beef sold abroad Brazil remained, in 1985, the third major beef exporter in the world after the EC and Australia. The policy of daily "mini-devaluations" of the cruzeiro was obviously favouring the Brazilian export performance. Simultaneously, the hygienic conditions of the exported product as well as the delivery time are reported to have improved markedly in the last few years. Also, the importation of beef for processing and re-exportation has proved to be financially interesting and favouring beef exports.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1985/86
Cattle and calf numbers[1/]:	132,801	136,641	+ 2.9	140,740	+ 3.0
Beef and veal[2/]:					
Production	2,153	2,200	+ 2.2	2,300	+ 4.5
Consumption	1,860	1,917	+ 3.1	1,959	+ 2.2
Imports	37	70	+ 89.2	..	..
Exports	479	450	- 6.1	400	- 11.1

1/ '000 head, estimates

2/ '000 tons

Colombia

53. The cattle herd in Colombia has seen only minor year-to-year changes in the recent past and stood in 1985 at 24,000,000 head, a decrease of 1.9 per cent compared with year earlier. Most of the cattle is reared for meat producing purposes. In 1985 3,216,000 head of cattle was slaughtered, 1,902,000 head of which were adult male animals. No calves were culled. The overwhelming majority of cattle is slaughtered for home consumption. Beef production totalled 619,500 tons in 1985, a 3.5 per cent increase compared to year earlier, but a drop of 5 per cent compared with 1981. Consumption, also at a peak in 1981, totalled 616,300 tons in 1985, an increase of some 3.9 per cent compared with 1984 but a decline of 2.1 per cent compared with the peak year. In the same period per capita consumption dropped from 24 kg. to 19.7 kg. due to the general economic situation and rising retail prices.

54. Colombia is a traditional exporter of mostly fresh, chilled and frozen beef. In 1985 exports amounted to 3,200 tons, a sharp drop of 39.0 per cent compared with year earlier. The drop could be attributed, at least partly, to increased competition on the world markets and the very low prices on certain of these. Most of Colombia's bovine meat exports have gone to Venezuela, in particular the fresh and chilled ones.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
Cattle and calf numbers[1/]:	24,476	24,000	- 1.9	..	..
Beef and veal[2/]:					
Production	598.6	619.5	+ 3.5	633.4	+ 2.2
Consumption	593.3	616.3	+ 3.9	630.1	+ 2.2
Exports	5.25	3.2	- 39.0	10.0	+ 212.5

1/ '000 head

2/ '000 tons

Uruguay

55. According to the results of the 30 June 1985 cattle census, an increase of 1.5 per cent, to 9,222,000 head was registered in the Uruguayan cattle herd. The herd liquidation process has apparently now come to an end, and while beef cow and calf numbers have already increased by 1.7 per cent and 14.3 per cent respectively, dairy cow numbers were still declining but at a lower rate than year earlier. Virtually all categories of cattle are expected to rise in 1986. Cattle slaughter totalled 1,315,000 head in 1985, down by 12.5 per cent from year earlier, clearly illustrating the end of herd liquidation as the drop was largely due to a 26.2 per cent drop in female cattle slaughtering. The decline in slaughter levels is expected to continue in 1986, to some 1,308,000 head. Production of beef and veal fell by

some 13.2 per cent during the first half of 1985 reflecting lower slaughterings. However, partly as the result of the sales agreements to Brazil (concerning some 65,000 tons) in the second half of the year production rose and was estimated at about 319,000 tons by the end of the year, up by 3 per cent from year earlier.

56. In real terms, bovine meat retail prices increased, on average, by 2.2 per cent during the first six months of 1985, while the price of poultry (which, however, represents only some 6 per cent of total meat intake) declined by some 9 per cent. This clearly illustrates that the preference of the Uruguayan consumer goes, like in other South American countries, to beef, the consumption of which is relatively little affected by the competition of other meats. In spite of the price increase (and the decline in the prices of competing meats) consumption of beef is expected to have risen in 1985, to 184,000 tons, or 60-61 kg. per capita. This increase appears on the one hand due to higher output in the second half of the year and on the other to rising wages in the last few months. In 1986 the effects of rising wages are expected to strengthen and consumption is forecast to rise further as a result of a sharp decline in exports, and in spite of a forecast 12 per cent drop in production.

57. Projected at 139,000 tons for 1985 (3.5 per cent less than year earlier), a stronger decline of exports of beef and veal was avoided by the strong increase in exports to Brazil in the second half of the year. Exports of frozen beef (86 per cent of total exports) fell to 44,000 tons, from January to June 1985, nearly 50 per cent below year earlier. Like Argentina, Uruguay was faced with weak export demand coupled with more intense competition in some of its traditional markets. To Egypt, for years Uruguay's major market and where in the last five years it placed a yearly average of 28,000 tons (with a record 60,000 tons in 1983), exports were nil in 1985. Uruguay was not able to win any tender, won in the large majority of the cases by the EC which was proposing lower prices. The Government has recently set the following objectives for the bovine meat sector: a seven-year programme for the eradication of foot-and-mouth disease in collaboration with Brazil and Argentina; the implementation of a regulatory stock to meet internal market demand; the progressive increase over three years of total canned meat exports to a level of 50 per cent of total exports to the markets free of foot-and-mouth disease, (in 1985 this level is estimated to have been of only some 9 per cent).

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1985/86
Cattle and calf numbers 1/:	9,085	9,222	+ 1.5	9,561	+ 3.7
Beef and veal 2/:					
Production	310	319	+ 2.9	280	- 12.2
Consumption	177	184	+ 4.0	190	+ 3.2
Exports	144	139	- 3.5	90	- 35.7

1/ '000 head, 30 June

2/ '000 tons

United States

58. Inventory reductions continued throughout 1984 and 1985 in the United States, primary reasons of which were poor returns to producers and the necessity to create additional cash flows by selling young female cattle. At the census at the begining of 1985, cattle and calves numbered 109,801,000 head, the lowest level since 1968, and a drop of 3 per cent from year earlier. The beef cow herd declined by 6 per cent as a result of low returns and drought conditions while the dairy cow herd contracted partly as a consequence of the dairy diversion programme. Replacement beef heifers dropped by 10 per cent due mainly to increased placements in feedlots, partly encouraged by low feedgrain prices. Dairy heifer numbers increased, however. The July 1985 inventory confirmed the continuation of the decline in cattle numbers. At 116,300,000 head, the inventory was the lowest since 1973 as cattle producers carried on adjusting numbers in response to large meat supplies and continued low prices. The calf crop is projected to be down 3 per cent in 1985 compared to year earlier, the lowest level since 1961. A further drop in inventory numbers is projected for January 1986 (to 107,000,000 head); an expansion is not expected before 1988.

59. Slaughter levels declined some 3 per cent in the first half of 1985 compared to year earlier but more heavy cattle were culled: because of cattle producers' expectations of rising prices (unrealized) marketings were delayed, resulting in record high average weights when the cattle was finally slaughtered. This accounts for the 13.2 per cent increase in commercial production[1], to 5,265,000 tons, (preliminary figure), that occurred in the first half of the year, compared to the same period of 1984. Third quarter production remained high due to a backlog of over-finished fed cattle but autumn production is expected to decline although maybe not significantly since some time would be required for average weights to diminish sufficiently. For the year as a whole, production was likely to be higher than year earlier. For 1986, average slaughter weights and production are forecast to be dropping, the latter by some 7 per cent. Total red meat and poultry production is projected to fall by around 2 per cent while poultry should increase by some 4 per cent.

60. The increase in production led to lower producer prices for beef, a situation only partly compensated by low feed prices, which cut production costs, as the increase in production of both pork and poultry, which responds faster to low feed prices, added a further downward pressure on beef prices. Prices in the second quarter of 1985 for Omaha choice steer averaged US$57.66, some 12.6 per cent below those of year earlier and remained below $60 throughout the quarter. In July, prices dropped further to $50 with an average of $58.50 for the month, the lowest fed steer prices since 1978. Prices started to move up only in the second half of September as a consequence of the belief that the slump in demand of fed cattle had ended. However, third quarter prices for Omaha fed cattle averaged only $52.55, down from $64.28 in 1984. In the last quarter of the year prices strengthened to $62.12 as a result of decreasing supplies on the market. For 1986, an increase in prices to the mid-$60s has been projected as a consequence mainly of expected drops in beef production. However, it is probable that any rise in prices will be moderated by large supplies of pork and poultry. Retail prices for choice beef in 1985 are estimated to have averaged 2-3 per cent below those of 1984 and they are projected to strengthen somewhat in 1986, approaching the level of 1984.

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[1] On average 99 per cent of total production.

61. Per capita red meat consumption (beef and pork) was expected to decline somewhat in 1985 while poultry consumption was forecast to rise by 1-1.5 kg. Total consumption of beef and veal is estimated at 11,690,000 tons for 1985, up by 0.8 per cent on year earlier, while per capita consumption was forecast at 49.4 kg., down 0.2 per cent from year earlier. A recent consumer study by the Meat Board and American Meat Institute suggested that price is still the major factor influencing fresh beef consumption but health factors and change in eating habits also appeared of importance. For 1986 total beef and veal consumption is forecast to decline some 6.9 per cent to 10,882,000 tons, rising retail prices being one of the major causes.

62. The Meat Import Law "trigger" level for 1985, 598,300 tons (product weight), was not surpassed since also the fourth quarterly estimate of US imports was below the quota level. It is expected that, although imports from both Australia and New Zealand were up slightly from year earlier, total meat imports subject to the Law will be around 49,442 tons (product weight) below the trigger level in 1985. Total beef and veal imports for 1985 are projected at 885,000 tons, up 5.6 per cent compared to 1984. A further increase to 902,000 tons is forecast for 1986, mainly as a result of the expected declines in domestic production. Exports of beef and veal from the United States have been increasing steadily over the last several years. A major part of the beef sales are to Japan, which gets more than 70 per cent of total exports. In 1985, the United States exported some 158,000 tons of beef and veal, some 4 per cent more than in 1984, and a further increase of some 8.9 per cent, to 172,000 tons is forecast for 1986. However, this figure could be considerably higher if the 1985 Farm Bill has the results planned as concerns beef. Around three-quarters of US fresh and frozen beef exports go to Japan and it is expected that this country will continue to be the United States' major beef customer in the years to come.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
Cattle and calf numbers 1/:	113,700	109,801	- 3.4	107,000	- 2.6
Beef and veal 2/:					
Production	10,839	10,860	+ 0.2	10,072	- 7.3
Consumption	11,597	11,690	+ 0.8	10,882	- 6.9
Imports 3/	838	885	+ 5.6	902	+ 1.9
Exports 3/	152	158	+ 3.9	172	+ 8.9

1/ '000 head at 1 January

2/ '000 tons

3/ Including cooked and canned beef

Canada

63. For the fourth year in a row, the January 1985 cattle census in Canada showed a decrease in cattle numbers. These totalled 10,964,900 head, a drop of 3.5 per cent compared to year earlier, and 9.9 per cent compared to 1981. The continued herd liquidation was mainly due to depressed feeder cattle prices since 1981, and the bleak prospects for a recovery, coupled with severe drought conditions in Western Canada. No major improvement intervened in 1985, a further drop in numbers having been forecast for the end of the year (to 10,540,000 head, a decrease of some 3.9 per cent). Inspected cattle and calf slaughter increased some 3.2 per cent, to 2,781,400 head, in the first three quarters of the year and average dressed carcass weights grew by 2.5 per cent. For the year as a whole a 1.8 per cent increase in inspected slaughter is expected, indicating a seasonal slowdown in the fourth quarter. For 1986, a 3.4 per cent decrease is projected. Contrary to earlier expectations of a fall in production of beef and veal (inspected and uninspected), it is now estimated at 1,034,600 tons in 1985, up 3.7 per cent compared to year earlier. The revised estimate is due to the continuation of herd liquidation as farmers do not as yet see a change in the past year's poor profitability, and in particular to a sharp (11 per cent) increase in cow slaughter. For 1986, and in line with prospective developments in slaughter rates, production of beef and veal is projected to decrease with a larger decrease in the second half of the year than in the first.

64. Per capita consumption of beef and veal is expected to have decreased marginally (-0.3 per cent), to 40 kg., in 1985, reaching its lowest level since 1980. Beef and veal consumption accounted for over 43 per cent of total meat consumption in Canada, down from a peak level of more than 53 per cent in 1976. The major reasons for the decline in share appear to be low income growth and relative prices of meats even though dietary changes, health concerns, population changes and lifestyle changes also appear to have influenced consumption negatively. Total beef and veal consumption in 1985 is expected to have increased by 1.1 per cent to 1,020,500 tons, a rise entirely due to population growth. A decline in both total and per capita consumption is, however, projected for the two coming years, reflecting anticipated reductions in the production of beef and higher prices, as well as increased competition from other meats. Average retail prices for beef increased only modestly (0.4 per cent) in the first six months of the year while pigmeat prices actually decreased somewhat. Some firming of prices may be expected in the fourth quarter.

65. Imports of beef and veal into Canada in 1985 are expected to have decreased by some 3.7 per cent to 112,000 tons. Actual imports of bovine meat to the end of September amounted to some 55,438 tons (preliminary figure), 0.7 per cent more than year earlier. Most of the beef was imported boneless. The major supplier was New Zealand with some 19,352 tons, 73.4 per cent more than year earlier, followed by the United States (12,950 tons, +6.6 per cent), Australia (12,306 tons, -21.1 per cent) and the European Community (8,472 tons, -46.5 per cent). Canada also imported some 65,000 head of live animals in 1985, more than double the amount of 1984. Most of these imports would have come from the United States. Exports of beef and veal amounted to some 65,808 tons (+12.6 per cent compared to year earlier) in the first nine months of the year, more than 90 per cent of which went to the United States, traditionally Canada's major market. For the year as a whole exports of

beef and veal were expected to reach 114,000 tons, 9.8 per cent more than in 1984. Exports of cattle decreased by some 2.6 per cent to 251,000 head in the first eight months of the year, the only recipient of which was the United States.

66. At the beginning of 1985, Canada announced that it was going to restrict imports of beef and veal (fresh, chilled and frozen) in 1985 to 66,500 tons (product weight). This action was taken pursuant to Article XIX (safeguards) of the GATT. The reasons given were that Canadian authorities were of the opinion that bovine meat was "imported in such increased quantities and under such conditions as to cause and threaten serious injury to the producers in Canada". The global quota initially established for 1985 was at the same level as the GATT minimum access level. Subsequently, as a result of consultations, some increases in the quantities to be permitted entry in 1985 were made, resulting in the following individual quotas: Australia - 24,900 tons; EC - 10,668 tons; New Zealand - 28,800 tons; Nicaragua - 1,783 tons and the United States - 9,800 tons (all of which in product weight). Certified high quality beef was exempted from the quota.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
Cattle and calf numbers[1/]:	11,360	10,965	- 3.5	10,540	- 3.9
Beef and veal[2/]:					
Production	997	1,035	+ 3.7	1,003	- 3.0
Imports	116	112	- 3.7	112	0.0
Consumption	1,010	1,021	+ 1.1	990	- 3.0
Exports	104	114	+ 9.8	111	- 2.6

[1/] '000 head at 1 January

[2/] '000 tons

Australia

67. Preliminary figures from the 31 March 1985 census indicate that herd rebuilding has begun in earnest after a hesitant start. Cattle numbers totalled some 22,738,000 head, up 2.6 per cent from year earlier, reflecting good pasture conditions and expectations of higher prices. Beef cow numbers were up 3.5 per cent while most other categories decreased. The March 1986 census is forecast to show another increase with numbers totalling 23,300,000 head (+2.5 per cent), provided no serious changes in conditions, such as drought, or drastic drop in prices, occur. The lower level of cow and heifer slaughterings in the first six months of 1985, (38 per cent of total slaughterings) also suggests that herd rebuilding is continuing, while total inspected slaughterings for the same period were 3.2 per cent higher than year earlier. For the year as a whole an increase of 4.3 per cent in slaughter and a small decrease in average dressed weights are expected. For 1986, a marginal rise in average weights are forecast and an increase of some 3.5 per cent in slaughter. In the first six months of 1985 production dropped 2.8 per cent, due mainly to decreases in average

slaughter weights. Production of beef and veal for the whole year was expected to show a 1.8 per cent increase, totalling 1,270,000 tons. Because of forecast slaughter increases and the small anticipated rise in weights, 1986 beef and veal production is projected to rise to 1,340,000 tons, an increase of 5.5 per cent.

68. Consumption of beef and veal has been dropping steadily in Australia for the last several years. In 1985 total consumption was expected to reach 600,000 tons, the lowest level since 1973 and a drop of 6.0 per cent compared to year earlier. Per capita consumption was projected at 39.0 kg., down 4.9 per cent. The level of consumption in Australia is affected by several factors, the main one of which is retail price, which in turn is affected by the level of domestic production and developments in the export markets. In 1986 consumption is projected to recover to 614,000 tons (2.3 cent) and 39.4 kg. per capita, as a result of lower domestic prices due to competition from other meats, and of higher beef output. Another rise is forecast for 1987 in line with projected increases in production.

69. Exports of beef and veal were expected to rise to 690,000 tons in 1985, an increase of 11.8 per cent compared to year earlier, the reasons being higher production levels and higher demand in major import markets such as the United States. In the first seven months of the year, Australia exported 253,871 tons (shipped weight) of fresh, chilled and frozen beef and veal, an improvement over the same period last year of some 14.5 per cent. Some 162,309 tons of the total (63.9 per cent) was exported to the United States, by far the most important market for Australia, compared to 130,518 tons a year earlier. This rise in exports occurred in spite of low import prices but the United States remained attractive because of the value of the US dollar compared to the Australian one. In line with projected increases in production in 1986, and an anticipated strengthening of prices in the United States, Australia forecasts an expansion of beef and veal exports in 1986 to a level of 724,000 tons (+4.9 per cent). A further increase is projected for 1987.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
Cattle and calf numbers[1/]:	22,161	22,738	+ 2.6	23,300	+ 2.5
Beef and veal[2/]:					
Production	1,248	1,270	+ 1.8	1,340	+ 5.5
Consumption	638	600	- 6.0	614	+ 2.3
Exports[3/]	617	690	+ 11.8	724	+ 4.9

[1/] '000 head at 31 March

[2/] '000 tons

[3/] Includes carcass weight equivalent of cooked and canned exports.

New Zealand

70. Preliminary figures from the June 1985 cattle census indicate, at 7,940,000 head (+2.1 per cent), a continued build-up in cattle numbers, after the drop in 1981-1983. Retention of male calves from the dairy sector for beef rearing took place in the spring of 1984 and the spring of 1985 is expected to have seen an additional rise. The June 1986 census is projected to show a further increase in cattle numbers of some 1.4 per cent to 8,050,000 head. Sheep numbers stood at 68,500,000 head, down 1.7 per cent from the June 1984 census and reflecting the changing profitability of sheep and cattle. For 1986, another fall of 2.9 per cent is forecast. Cattle and calf slaughterings in the period 1 October 1984-30 September 1985 amounted to 2,810,300 head, 8.2 per cent more than a year earlier. Also sheep and lamb slaughterings increased in the same period to 50,719,200 head (+16.3 per cent). Total meat production in the 1984-85 season is estimated at 1,305,000 tons (bone-in weight), some 10 per cent more than year earlier. Of this, 497,000 tons would be beef and veal, 14.5 per cent more than year earlier, and 717,000 tons lamb and mutton, 7.5 per cent more than year earlier. Production of beef and veal in the calendar year 1985 is estimated at 513,600 tons, 11.7 per cent more than in 1984. Lower average carcass weights are believed to have limited the production increase of mutton and lamb while beef production would have been boosted by the slaughter in May-June 1985 of the extra cattle retained from the dairy sector in the spring of 1983. For the 1985/86 season a drop of 2.6 per cent in total meat production is forecast, to 1,271,000 tons, 666,000 tons of which would be mutton and lamb (-7.1) and 512,000 tons beef and veal (+3.0 per cent). However, in the calendar year 1986, the beef and veal production increase would be limited to 1.5 per cent, with a total of 521,400 tons.

71. Total consumption of beef and veal in 1985 is estimated at 118,200 tons, an apparent drop of 13.5 per cent compared to year earlier. Consumption of beef and veal per capita is estimated at 35.9 kg., a decline of 9.1 per cent, out of a total meat consumption of 101.6 kg. A small increase in total beef and veal consumption is expected in 1986.

72. Although total consumption is expected to remain relatively stable, per capita consumption of beef and veal is forecast to drop further in 1986 whereas sheepmeat consumption should increase. However, the apparent declines in consumption since 1984 are partly explained by the change in method of calculation of domestic consumption. Exports of beef and veal from 1 October 1984 to the end of September 1985, totalled 362,000 tons (228,000 tons product weight), 27.5 per cent more than year earlier. Exports to the United States, New Zealand's most important market in volume terms, since the beginning of 1985 to 30 September, amounted to 144,700 tons (product weight), some 24 per cent more than year earlier, in spite of the lower than earlier expected prices paid by the US importers. New Zealand exporters anticipated strengthening prices in the remainder of the year (which did indeed materialize) as a result of expected production declines, in particular of lean beef. It was estimated that total beef and veal exports to the United States would increase by around 20 per cent in 1985 to 175,000 tons (product weight). In view of projected increases in beef and veal production, and provided no dramatic price decreases occur on major export markets, it could be expected that exports will increase further in 1986.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
Cattle and calf numbers[1/]:	7,776	7,940	+ 2.1	8,050	+ 1.4
Beef and veal[2/]:					
Production	460	514	+ 11.7	521	+ 1.5
Consumption	136	118	- 13.5	119	+ 0.8
Exports[3/]	284	362	+ 27.4	402	+ 11.0

[1/] '000 head at 30 June

[2/] '000 tons

[3/] Year ending 30 September

Japan

73. The February 1985 cattle census in Japan indicated that the uptrend in cattle numbers evident in the country since 1975 continued, although gains were slight, 0.3 per cent, cattle and calves totalling 4,698,000 head. Since 1975 the herd has increased by 28.9 per cent or more than 1 million head. The only categories of cattle showing a decrease in the latest census were dairy cows (0.8 per cent) and beef cows (-1.9 per cent), reflecting uncertainties about breeding prospects. Cattle and calf slaughterings totalled 719,000 head in the first half of 1985, up 2.6 per cent compared to year earlier. Also, average slaughter weights were up somewhat (+1.6 per cent). Most of the increase in slaughter was in the Wagyu beef sector, and Wagyu's share in total slaughterings increased to 36 per cent (from 34 per cent year before). It could be expected that this trend continued the whole year. Production of beef and veal rose by 4.1 per cent to 253,000 tons in the first half of 1985. Since 1961 production of bovine meat in Japan has risen by some 27 per cent partly, if not mostly, due to increased efficiency and productivity. It is likely that beef and veal production continued to increase in the second half of the year. In the medium to longer term, however, recent increases in slaughter of beef cattle may show up in fall-offs in production of beef. The growth in Wagyu slaughter reflected the cattle farmers' decision to liquidate herds in the face of perceived decreases in profitability due to enduring low calf prices and maybe also because of concerns about the results of possible further import liberalization.

74. In the face of a continued robust economy with relatively low inflation and unemployment, and generally steadily increasing disposable incomes, as well as stable and even decreasing retail prices for beef, total consumption of beef and veal increased by some 3.5 per cent in the first half of 1985 compared to year earlier, to 358,000 tons. Consumption continued to grow in the second half of the year and for the year as a whole, it could be in excess of 785,000 tons. A continuation of consumption growth is likely in 1986, even if it is possible that the

rate of growth may slow down. Imports of beef and veal in the first half of the year increased compared to year earlier by 1.9 per cent to 105,000 tons. Most of the beef was imported fresh or chilled with some minor quantities in the form of cooked and canned beef. Australia provided 63.3 per cent of total fresh and chilled imports, followed by the United States (28.5 per cent) and New Zealand (5.1 per cent). Cooked and canned beef and veal imports came mainly from Australia, the United States and Brazil. The global beef import quota for fiscal year 1985/86 was established at 152,000 tons (product weight), 5.6 per cent more than year earlier. The general quota increased by 8,200 tons while the special quotas rose by 800 tons to 17,600 tons. The increase in the quota is mainly a result of the understandings Japan has with its two main suppliers.

75. A new transaction system for imported frozen beef was introduced in the spring, called "simultaneous buying and selling tenders system" (SBS). The new system will facilitate users' direct consultations with overseas suppliers as to the buying specification, cut and quantity of beef to be imported. Subsequently, users in association with importers will submit simultaneous buying and selling bids to the LIPC. The latter will decide whether to accept bids and offers. The annual SBS quantity amounts currently to some 13,000 tons.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
Cattle and calf numbers[1/]:	4,682	4,698	+ 0.3	4,712[3/]	+ 0.3
Beef and veal[2/]:					
Production	535	555[3/]	+ 3.7	565[3/]	+ 1.8
Consumption	757	790[3/]	+ 4.3	816[3/]	+ 3.3
Imports	222	235[3/]	+ 5.9	251[3/]	+ 6.8

[1/] '000 head at 1 February

[2/] '000 tons

[3/] Secretariat estimates

IV. SUMMARY OF THE SITUATION IN CERTAIN FAR EASTERN AND MIDDLE EASTERN BOVINE MEAT IMPORTING COUNTRIES

The Republic of Korea

76. Cattle numbers in the Republic of Korea, which in 1984 totalled 2,652,000 head, were expected to rise further during 1985, and may have reached some 2,937,000 head. This upward trend appears to be in line with earlier projections that by 1987 the Korean cattle herd would reach 3,000,000 head, but was in 1985 depressing cattle prices which were reportedly at a level 15 per cent lower than year earlier. Cattle slaughter was also rising and so was, consequently, beef production. Estimates for the year as a whole suggested a 10 per cent increase to some 102,000 tons. However, some sources estimate Korean beef production at much higher levels such as 155,000 tons in 1985, representing a 27.1 per cent increase. Whatever the absolute value of figures, there is no doubt that production has been rising at least since 1983, explaining partly the drop in import levels.

77. As far as consumption is concerned, it would seem that the downward tendency registered in 1984 (an estimated drop of about 8 per cent) continued in 1985. This was due to continued high availabilities of lower priced pigmeat, but certainly also to the important decline in the Korean economic growth (6.5 per cent less than year earlier), affecting consumers' incomes and their demand for beef negatively. The considerable availabilities of both beef and pigmeat continued to have a major impact on imports. During the first half of 1985 Korea imported insignificant quantities of beef (37 tons), all coming from China. A new system for the fixing of retail prices of domestically produced beef was introduced at the end of April which is expected to have a positive impact on its consumption. Although retail prices for imported beef are set independently of this new system, it may be expected that, in the long run, the demand for imported beef will benefit from a rise in the consumption of domestic beef.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
Cattle and calf numbers[1/]:	2,652	2,937	+ 10.7	..	..
Beef and veal[2/]:					
Production	93	102	+ 9.7	..	..
Consumption	106.5	..	..	..	..
Imports	26	-	- 100.0	..	..

[1/] '000 head

[2/] '000 tons

Singapore

78. In 1984, Singapore imported 10,750 tons of beef (product weight), 6.3 per cent less than year earlier. This decline is reportedly related to a slowdown in Singapore's economic growth, especially in the second half of the year, to an increased pigmeat supply and to a declining

foreign population. Australia remained the major supplier, but its market share fell from 65.5 per cent in 1983 to 41.4 per cent in 1984. Its second major supplier, New Zealand, has seen its market share decline as well. Benefiting from an authorization to export beef to Singapore since February 1984, Brazil, Uruguay and Argentina together rapidly took a 27.2 per cent share of the market. Brazil, in particular, placed 1,888 tons of frozen boneless beef, a 17.6 per cent share of total imports.

79. In spite of a further decline in economic growth in 1985, Singapore imported from January to July about 7,000 tons of beef, up by 3 per cent, compared to year earlier. The explanation seems to reside in the lower prices of South American product, and especially the Brazilian one. During this period, Brazil was Singapore's first supplier with a 38.5 per cent market share. Brazil, Uruguay and Argentina's share, altogether, amounted to some 56.1 per cent, mainly at the expense of Australia, but also of New Zealand.

Taiwan

80. Cattle numbers in Taiwan are estimated to have remained stable in 1984 at some 130,000 head (including buffalo). Reportedly, numbers were expected to rise in 1985 to some 136,000 head. Cattle slaughter was also expected to rise and, as a result, production of beef was projected to total some 7,000 tons, up by 1,000 tons from year earlier. Following trends in recent years, consumption was forecast to continue to rise and might have reached some 32,000 tons. As a result of the large discrepancy existing between consumption and production levels, Taiwan is a net beef importer and during the last five years imports more than doubled to reach 24,090 tons in 1984. From January to April 1985, imports totalled 7,998 tons, up by 27.4 per cent. For the year as a whole they were projected to increase to some 25,000 to 30,000 tons. Australia is traditionally, and by far, Taiwan's major supplying country with an average market share of some 85-90 per cent in recent years, followed by New Zealand and the United States. Sweden, which first exported to this market in 1984 (400 tons), is rapidly increasing its sales, which during the first half of 1985 totalled some 1,300 tons.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
Cattle and calf numbers[1/]:	130	136	+ 4.6	140	+ 2.9
Beef and veal[2/]:					
Production	6	7	+ 16.7	7	0.0
Consumption	30	32	+ 6.7	32	0.0
Imports	24	25-30	+ 4.2-+ 25.0	..	..

[1/] '000 head, including buffalo

[2/] '000 tons

Hong Kong

81. Reflecting the rise in beef consumption in the last few years, provoked by rising incomes, imports of bovine meat have trended upwards in Hong Kong. In 1984, 27,527 tons, product weight, were imported, an increase of about 0.3 per cent compared to year earlier. China, which is traditionally one of Hong Kong's major suppliers, has been increasing its market share, which in 1984 totalled some 51 per cent. However, the most marked increases in terms of market share have been registered by Uruguay and especially Brazil. The Brazilian share represented some 24 per cent in 1983 and 20 per cent in 1984. The countries most affected were Australia and New Zealand which have consequently seen their market shares declining. From January to April 1985 imports increased by about 14 per cent compared to year earlier. During this period Brazil's market share rose by some 6.4 per cent.

Saudi Arabia

82. Cattle numbers in Saudi Arabia have been estimated at 173,000 head in 1985, down by 8.5 per cent compared to year earlier. Cattle slaughter was expected to remain unchanged and consequently production was projected at its 1984 level, 18,000 tons. Consumption of beef and veal has been rising regularly in the last few years and in 1985 was projected to increase by some 6 per cent, to 88,000 tons. In recent years Saudi Arabia has emerged as one of the major importing countries in the Middle East and was expected to import some 70,000 tons in 1985, up by 7.7 per cent compared to 1984. Major beef suppliers to the Saudi Arabian market are Australia, India and, more recently, the European Community which in 1984 accounted for a 40 per cent share of the market.

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
Cattle and calf numbers[1/]:	189	173	- 8.5	161	- 6.9
Beef and veal[2/]:					
Production	18	18	0.0	18	0.0
Consumption	83	88	+ 6.0	93	+ 5.7
Imports	65	70	+ 7.7	75	+ 7.1

1/ '000 head

2/ '000 tons

Source: USDA - Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1985

Iran

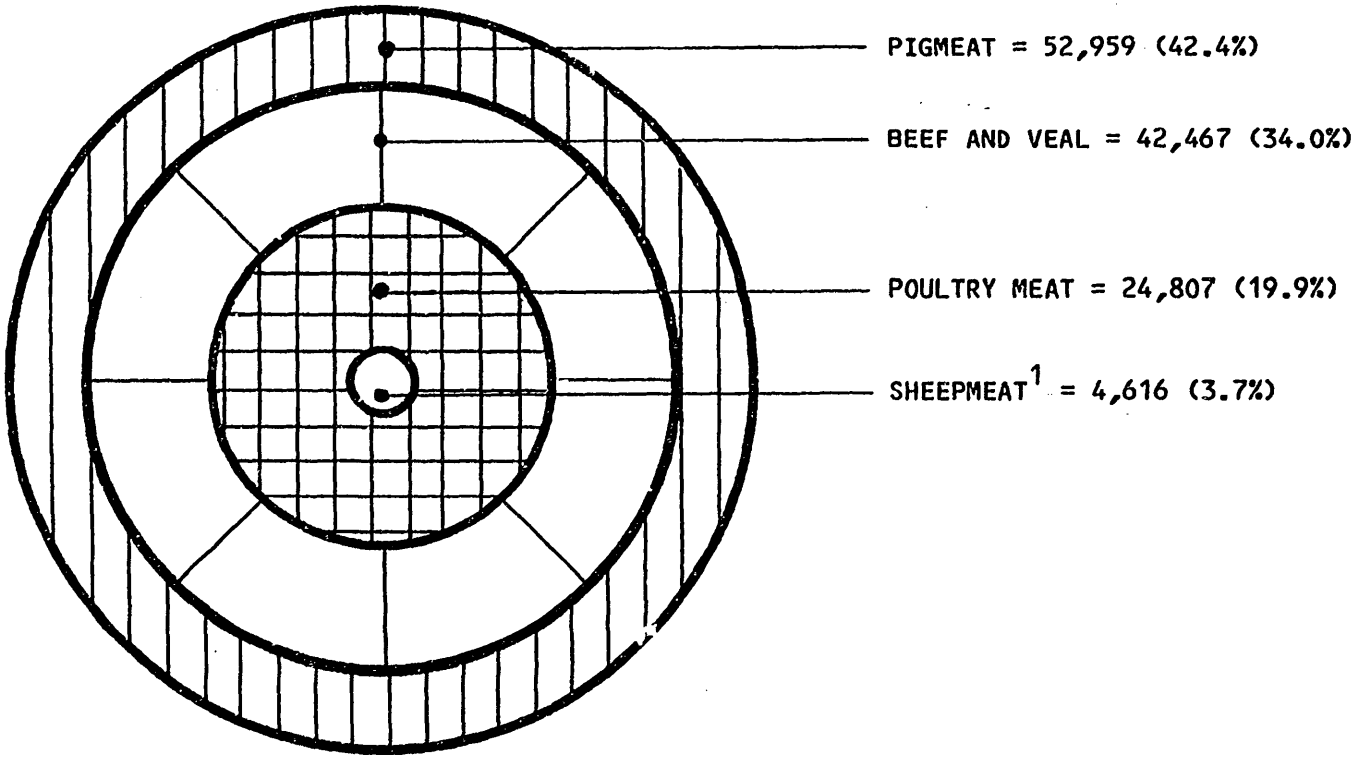
83. Beef production in Iran is currently estimated at some 100,000 tons. As in most Middle Eastern countries, consumers' preference goes to sheep and goat meats, the production of which is estimated to total 350,000 tons. Poultry meat production is believed to have risen to 260,000 tons in 1985.

In spite of the rationing system introduced as a result of the Iran-Irak war, Iran remains an important buyer of meat and in 1984 beef imports are estimated to have totalled 75,000 tons, 45,000 tons of which came from the European Community (imports of sheepmeat amounted to 170,000 tons, 136,000 of which were from New Zealand). Iran is apparently no longer a significant importer of live animals. It is estimated that Iranian imports of meat would have continued to increase in 1985. Iran has an oil-lamb barter deal with New Zealand, according to which this latter country is to supply Iran with 130,000 tons of frozen lamb this season, receiving oil in exchange. Iran also has an agreement with Ireland for the importation of 31,000 tons of beef.

Israel

84. Production of beef and veal in Israel is currently reported to total some 35,000 tons, estimated to be well below demand, even though there is a consumer preference for poultrymeat. As in practically all other countries in this region, pigmeat and horsemeat consumption is forbidden and imports of beef are subject to severe controls, both of a religious (at the slaughter stage) and veterinary and sanitary nature. It is also admitted that the Israeli consumer prefers other sources of proteins, such as dairy products, fruits and vegetables. Nevertheless, Israel imported an estimated 43,000 tons of beef in 1984 and was expected to import some 47,000 tons in 1985. Its major suppliers are traditionally Argentina, Brazil and Uruguay.

WORLD PRODUCTION OF MEAT: QUANTITIES AND SHARES OF EACH TYPE OF MEAT 1985



TOTAL WORLD MEAT PRODUCTION: 124,849

Quantities are expressed in metric tons, carcass weight equivalent

[1] Includes lamb, mutton and goat meat

SOURCE: BASED ON USDA ESTIMATES (World Livestock and Poultry Situation, World Livestock and Poultry Situation - September 1985)

V. SITUATION AND OUTLOOK IN THE INTERNATIONAL PIGMEAT MARKET

85. After a 1.95 per cent increase in world production of pigmeat[1] in 1984, a further increase of 2.3 per cent, to a new record level of some 52,959,000 tons, was estimated for 1985. The increase would be due to a substantial (+7.3 per cent) rise in China, the world's largest producer (some 29 per cent of world production) but also to increases in, inter alia, the European Community, the second largest producer, in some East European countries, as well as in Japan, Taiwan and the Republic of Korea. The world's third largest producer, the United States, however, was expecting a small cyclical production decrease. Countries participating in the Arrangement Regarding Bovine Meat, accounting for roughly 46 per cent of world pork production, were expected to show an increase of 2.2 per cent in 1985 to some 24,600,000 tons. In 1986 a further but smaller rise in world pork production is forecast[1].

86. World imports of pork were forecast[1] to decrease by some 3.2 per cent in 1985, totalling 1,103,000 tons, after a record level in 1984, the reason being mainly the higher level of production in many importing countries. Participating countries account for 80-90 per cent of world imports of pork. Of these, the world's largest importer, the United States, was expecting a substantial increase in imports in 1985, contrary to expectations earlier in the year. Imports in the first half of the year were up some 26 per cent due to large increases from Denmark and Canada. For the year as a whole a 15 per cent increase in pigmeat is expected to around 500,000 tons. Imports of live hogs from Canada should, however, have slowed down somewhat due to the imposition of countervailing duties last summer as a result of the determination by the Department of Commerce and the International Trade Commission that "live swine from Canada are receiving benefits which constitute subsidies within the meaning of the countervailing duty law, and that Canadian exports of live swine to the United States are materially injuring a United States industry". In contrast, imports of pork products were not found to be materially injuring a United States industry even though it was found that such products were receiving benefits which constituted subsidies. Japan, the second largest importer, was estimated to import considerably less in 1985 than year earlier, due mainly to higher production levels in that country in 1985. In the first half of the year imports stood at 118,000 tons, a drop of 21.3 per cent compared to year earlier. For the year as a whole a decline of 15-20 per cent may be expected. A 4.7 per cent increase in pork imports was by contrast forecast for the European Community while the USSR was expected to increase its imports only modestly. An increase in world pigmeat imports is projected for 1986, due, inter alia, to anticipated rises in Japan and the European Community.

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[1] Source: USDA, Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1985

SELECTED COUNTRIES' TRADE IN PIGMEAT

A. IMPORTS[1/]

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
United States	433	500	+ 15.5	476	- 4.8
Japan	278	225[2/]	- 19.1	265[2/]	+ 17.8
USSR[2/]	100	105	+ 5.0	140	+ 4.8
EC	148	155	+ 4.7	..	..
Poland	105	44	- 58.1	20[2/]	- 54.5
Hong Kong[2/]	55	60	+ 9.1	64	+ 6.7

B. EXPORTS[1/]

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
EC	394	400	+ 1.5	450[3/]	+ 12.5[3/]
Canada	173	185[2/]	+ 6.9	200[2/]	+ 8.1
Hungary	206	190[2/]	- 7.8	190[2/]	0.0
United States[2/]	74	54	- 27.0	50	- 7.4
Poland	88	93	+ 5.7	93	0.0
Sweden	76	61[2/]	- 19.7	45[2/]	- 26.2

[1/] '000 tons carcass weight, includes fresh, frozen and canned product but excludes live animals.

[2/] Source: USDA, Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1985

[3/] Estimated the by Meat and Livestock Commission, United Kingdom.

VI. SITUATION AND OUTLOOK IN THE INTERNATIONAL POULTRYMEAT SECTOR

87. World production of poultrymeat in 1985 is expected to have continued the upward trend of the past several years, in particular in view of ample supplies of relatively cheep feedgrains. Projections by the USDA[1] suggested an increase of around 3 per cent to some 24,807,000 tons. Increases were expected in practically all major producing countries. In the United States, the world's major poultrymeat producer (more than 30 per cent of world production), production was forecast to expand by more than 4 per cent to around 7,749,000 tons due to reduced feed costs resulting in favourable returns in particular to broiler producers. After two years of declines, production in the European Community was expected to recover somewhat, (+1.3 per cent) totalling 4,349,000 tons. Japan and the Soviet Union expected growth in excess of 6 per cent while Brazil was forecast to produce around 5 per cent more poultry meat in 1985 after a sharp decline the year before. In the first half of 1985 broiler production in Brazil was reported to have grown by some 14 per cent but because of weak domestic market prices, due, inter alia, to competitive beef prices, a fall of some 10 per cent in production was anticipated for the second part of the year, bringing supply more in line with demand. In 1986 a further increase in world production of poultrymeat is projected, with growth anticipated in all major producing countries or areas.

88. Only 4-5 per cent of poultrymeat production enters world trade, which has been declining in the past few years as a result of increased production in many major importing areas. For 1985 a further decline was expected. Major importing countries were projected to reduce imports in aggregate by around 2.4 per cent while major exporters may expect a drop of 1.4 per cent. The world's major importing area, the Middle East, was forecast to reduce imports by some 2.8 per cent, to a level of around 418,000 tons, as a result of increased domestic production due to governments' efforts to boost self sufficiency. The main importing country in this area, Saudi Arabia, was likely to reduce imports quite considerably, a figure of minus 14 per cent to 185,000 tons has been advanced, in order to protect its rapidly growing poultry industry. To this effect, the duty on fresh, chilled and frozen poultry and poultry liver was doubled in July 1985 (to 20 per cent). Another important customer in the area, Egypt, was expected to make up for some of the slack in imports by increasing its imports to some 130,000 tons, the same volume as in 1983, but a rise of 13 per cent compared to 1984. This forecast rise will probably be helped by the elimination in June of licensing requirements for poultry and offal imports. Imports of poultrymeat by the Soviet Union which were reduced considerably in 1984 (reportedly by some 14 per cent) were likely to have decreased slightly in 1985, in particular in view of rising domestic production. Japan, another main importing country, in contrast, was expected to raise its poultry imports by some 10.6 per cent to 115,000 tons[2]. In the first half of the year, Japan

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[1] USDA, Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1985

[2] USDA estimate

imported 47,000 tons of poultry meat, 4.4 per cent more than year earlier. On the export side, the European Community (mainly France) was anticipating a further reduction of exports in 1985 to 330,000 tons (-11.8 per cent) due mainly to reduced exports to the Middle East (Saudi Arabia in particular). Brazil is reported to have experienced a 23 per cent drop in exports in the first half of 1985, due mainly to a lack of shipping space but also, to a certain degree, to lower domestic prices and increased consumption. In the second half of the year export performance was expected to improve with somewhat higher domestic prices and better availability of shipping space but exports for the year as a whole were still expected to be 3.8 per cent below those of 1984. The United States was forecasting a decrease of poultry exports of some 1.9 per cent to 203,000 tons as a result of weak demand and slack prices. Also, the fourth world exporter, Hungary was expecting some reduction in 1985. In the first half of the year, this country exported 76,800 tons of poultry, most of which to the Soviet Union, a drop of 42.6 per cent on year earlier. However, second half export performance may have improved somewhat, thus reducing the decline for the year. For 1986, projections suggest a continuation of the decline in exports of poultrymeat for all major exporters except Hungary.

SELECTED COUNTRIES' TRADE IN POULTRYMEAT

A. IMPORTS[1/]

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
Middle East[2/3/]	430	418	- 2.8	388	- 7.2
USSR[2/]	114	100	- 12.3	90	- 10.0
Japan	104	115[2/]	+ 10.6	115[2/]	0.0
EC	76	75	- 1.3	..	..

B. EXPORTS[1/]

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
EC	374	330	- 11.8	..	..
Brazil[2/]	281	271	- 3.8	251	- 7.9
United States[2/]	207	203	- 1.9	195	- 3.9
Hungary	162.5	160[2/]	- 1.5	170[2/]	+ 6.3

[1/] '000 carcass weight, includes fresh, chilled and frozen product.

[2/] Source: USDA Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1985

[3/] Egypt, Iraq, Kuwait and Saudi Arabia

VII. SITUATION AND OUTLOOK IN THE INTERNATIONAL SHEEPMEAT MARKET

89. World production of sheepmeat is expected to have increased by some 2.9 per cent in 1985. New Zealand was reportedly experiencing record slaughter levels of lamb, increased by drought conditions, which were projected to result in a production of some 717,600 tons (bone-in weight), a rise of 7.5 per cent on year earlier. Developments in Australia also point to higher than year earlier slaughterings in 1985 where January-August sheep slaughterings were up by some 26.1 per cent and those of lamb 6 per cent. Production of mutton and lamb in the first three quarters of the year rose by 12.0 per cent to 356,700 tons reflecting poorer seasonal conditions at the beginning of 1985. The European Community was also expected to show an increase in sheepmeat production to some 755,000 tons, up by 2.7 per cent compared to year earlier. Other countries such as the United States and the USSR were likely to have seen production decline in 1985, the United States by around 10 per cent to 156,000 tons (producers holding additional lambs and ewes for breeding instead of sending them to slaughter) and the Soviet Union by around 4 per cent. World exports of sheepmeat were projected to increase significantly in 1985, reaching a level of around 953,000 tons (lamb, mutton and goat meat), a rise of 15.7 per cent on year earlier. Considering the anticipated drop in New Zealand's[1] exports, however, that figure may have to be revised. Sheepmeat exports by Australia in 1985, in contrast, were forecast to increase by 29.7 per cent due to considerably higher than year earlier availabilities. However, these higher supplies were likely to have resulted in lower prices both on the domestic markets and on the international ones. No substantial increases in imports appear likely to have occurred in the main importing countries or areas. The European Community probably stayed around its 1984 level of approximately 250,000 tons, due to ample domestic supplies of both sheepmeat and other meats, in particular beef and veal. In view of anticipated declines in sheepmeat production in the USSR but also of an overall increase in total meat production, that country is likely to have imported the same volume of sheepmeat or slightly more than in 1984, a volume that could be estimated at 50,000-60,000 tons in 1985. Some of that meat was probably supplied by New Zealand, which was the main supplier in 1984. Japan purchased less sheepmeat in the first half of 1985 than year earlier (-9.5 per cent) and previous expectations of increased imports in 1985 may not have been realized. Increased imports by some Middle Eastern countries may, however, have been achieved, in particular in view of the contract signed by the New Zealand Meat Board and Iran last spring to supply the latter country with some 130,000 tons of lamb in 1985 in exchange for oil. Also, Poland is expected to have increased its imports by some 18,000 tons as a result of a contract signed earlier with New Zealand in exchange for mining equipment.

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[1] New Zealand accounts for more than half of the world's sheepmeat exports.

SELECTED COUNTRIES' TRADE IN SHEEPMEAT

A. IMPORTS[1/]

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
EC	248	250	+ 0.8	..	..
Japan	150	150[2/]	0.0	160[2/]	+ 6.7
USSR[2/]	50	50	0.0	40	- 20.0

B. EXPORTS[1/]

	1984	Estimates 1985	%Change 1985/84	Forecast 1986	%Change 1986/85
New Zealand[3/]	488.6	479.5	- 1.9	515	+ 7.4
Australia	126.1	163.5	+ 29.7	..	..

[1/] '000 tons, includes both lamb and mutton: imports carcass weight equivalent; exports product weight

[2/] Source: USDA Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1985

[3/] Year ended 30 September

ANNEX

STATISTICAL TABLES

Table 1: Total cattle and calf numbers

Table 2: Cattle and calf slaughter

Table 3: Beef and veal production

Table 4: Stocks of beef and veal

Table 5: Consumption of beef and veal

Table 6: Imports of live cattle and calves

Table 7: Imports of fresh, chilled and/or frozen beef and veal

Table 8: Imports of beef and veal other than fresh, chilled and/or frozen

Table 9: Exports of live cattle and calves

Table 10: Exports of fresh, chilled and/or frozen beef and veal

Table 11: Exports of beef and veal other than fresh, chilled and/or frozen (canned, cooked, etc.)

Table 12: Beef prices:

- Average price received by producers
- Average retail price for beef

Table 13: Beef prices:

- Average or representative export prices
- Average or representative import prices

Table 14 - Pigmeat production

Table 15 - Pigmeat consumption

Table 16 - Pigmeat imports

Table 17 - Pigmeat exports

Table 18 - Poultry meat production

Table 19 - Poultry meat consumption

Table 20 - Poultry meat imports

Table 21 - Poultry meat exports

Table 22 - Sheepmeat production

Table 23 - Sheepmeat consumption

Table 24 - Sheepmeat imports

Table 25 - Sheepmeat exports

Symbols: The following symbols have been used in the summary tables:

... not available

- nil or negligible

NOTE: In the following tables a large part of the figures have been rounded. Percentage changes have been calculated from non-rounded figures.

TABLE 1 - Total Cattle and Calf Numbers ('000 Head)

Country	1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84	Forecast 1986	Forecast 1987
ARGENTINA (30 June)	54,000	52,500	53,900	54,600	+1.3	54,000	-1.1	53,500	...
of which cows	20,800	20,300	20,800	21,000	+1.0	20,800	-1.0	20,600	...
AUSTRALIA (31 March)	25,168	24,553	22,478	22,161	-1.4	22,738	+2.6	23,300	24,000
of which cows	10,332	10,166	9,303	9,265	-0.4	9,465	+2.2	...	...
AUSTRIA (3 December)	2,535	2,546	2,633	...	...	...	...	...	...
of which cows[1]	1,220	1,379	1,414	...	...	...	...	...	...
BRAZIL (Estimates)	121,597	125,188	128,952	132,801	+3.0	136,641	+2.9	140,740	...
of which cows	54,746	56,278	57,654	59,474	+2.8	61,139	+2.8	62,851	...
BULGARIA	1,792	1,007	...	1,770	...	1,780[2]	+0.1	1,781[2]	...
of which cows	711	706	...	...	...	...	...	...	...
CANADA (1 January)	12,166	12,088	11,618	11,360	-2.4	10,965	-3.5	10,540	10,261
of which cows	5,231	5,231	5,823	4,967	-2.1	4,782	-3.7	4,624	4,519
COLOMBIA	24,251	24,499	24,275	24,476	+0.8	24,000	-1.9	...	...
of which cows	...	...	...	...	...	...	...	...	...
EEC (December)	77,937	78,791	79,443	78,486	-1.2	77,700	-1.0	...	...
of which cows	31,002	31,351	31,669	31,084	-1.8	...	...	...	...
EGYPT[3] (1 November)	4,222	4,187	...	...	...	...	...	...	...
of which cows	...	...	...	...	...	...	...	...	...
FINLAND (15 December)	1,634	1,633	1,588	1,592	+0.2	1,557	-2.2	1,530	...
of which cows	689	683	658	651	-1.0	639	-1.8	629	...
HUNGARY (1 January)	1,918	1,945	1,922	1,907	-0.8	1,901	-0.3	1,909	...
of which cows	765	759	751	735	-2.1	725	-1.4	...	...
JAPAN (1 February)	4,385	4,485	4,590	4,682	+2.0	4,698	+0.3	4,712[2]	...
of which cows	2,090	2,104	2,140	2,152	+0.6	2,128	-1.1	...	...
NEW ZEALAND (30 June)[4]	8,036	7,912	7,631	7,776	+1.9	7,940	+2.1	8,050	...
of which cows	3,758	3,740	3,797	...	...	...	...	...	...
NORWAY (20 June)	1,014	1,009	975	964	-1.1	973	+0.9	...	...
of which cows	379	384	381	382	+0.3	376	-1.6	...	...
POLAND (June)	11,797	11,912	11,269	11,197	-0.6	11,055	-1.3	11,400	11,600
of which cows	5,757	5,835	5,776	5,759	-0.3	5,528	-4.0	5,760	5,760
ROMANIA (January)	6,485	6,303	6,246	7,039	+12.7	...	...	...	...
of which cows	3,188	3,090	3,031	3,095	+2.1	...	...	...	...
SOUTH AFRICA (August)	8,353	8,445	8,204	7,923	-3.4	7,830	-1.0	7,945	...
of which cows	3,981	4,066	3,973	3,944	-0.7	...	...	...	...
SWEDEN (June)	1,939	1,938	1,902	1,878	-1.3	1,845	-1.8	1,796	...
of which cows	732	731	724	717	-1.0	703	-2.0	678	...
SWITZERLAND (April)	1,954	1,945	1,933	1,943	+0.5	1,926	-0.9	1,920	...
of which cows	1,021	1,001	1,001	1,000	-0.1	974	-2.6	994	...
TUNISIA	583	578	606	615	+1.5	637	+3.6	661	...
of which cows	383	382	413	424	+2.7	438	+3.3	467	...
UNITED STATES (1 July)	124,670	124,140	123,540	113,700[5]	-8.0	109,800[5]	-3.4	107,000[5]	...
of which cows	50,934	49,970	49,600	48,603	-2.0	46,212	-4.9	...	...
URUGUAY (30 June)	11,421	11,237	9,704	9,085	-6.4	9,222	+1.5	9,561	...
of which cows	4,359	4,091	3,554	3,507	-1.3	3,566	+1.7	3,735	...
YUGOSLAVIA (15 January)	5,474	5,464	5,351	5,341	-0.2	5,199	-2.7	...	...
of which cows	3,087	3,079	3,050	3,005	-1.5	2,997	-0.3	...	...

[1] Includes beef heifers

[2] Secretariat estimates

[3] Includes buffaloes

[4] Year ended 30 September

[5] 1 January

TABLE 2 - Cattle and Calf Slaughter ('000 Head)

Country	1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84	Forecast 1986	Forecast 1987
ARGENTINA - Adult cattle	13,000	11,300	10,400	11,200	+ 7.7	13,800[5]	+23.2	13,000[5]	...
Calves	1,700	1,100	800	1,100	+37.5	...	...	...	...
AUSTRALIA - Adult cattle	6,692	7,795	6,633	5,482	-17.4	5,787	+ 5.6	5,850	6,100
Calves	1,446	1,669	1,470	1,168	-20.6	1,150	- 1.5	1,180	1,200
AUSTRIA - Adult cattle	559	560	563	...	...	...	...	...	...
Calves	193	196	181	...	...	...	...	...	...
BRAZIL - Adult cattle	9,863	11,566	11,432	10,042	-12.2	7,191[5]	-28.4	11,000[5]	...
Calves	79	93	92	53	-42.4	27	-49.1	...	...
CANADA - Adult cattle[3]	3,699	3,808	3,710	3,641	- 4.5	3,473	- 4.6	3,369	3,269
Calves	571	621	649	631	+ 5.0	670	+ 6.2	650	630
COLOMBIA - Adult cattle[5]	3,554	3,337	3,029	3,198	+ 5.6	3,216	+ 0.6	3,562	...
Calves	...	...	...	...	...	...	...	...	...
EEC - Adult cattle	21,554	20,389	20,930	22,683	+ 8.4	21,900	- 3.5	23,050[6]	...
Calves	6,668	6,676	6,858	7,306	+ 6.5	6,900	- 5.6	7,300	...
EGYPT[2] - Adult cattle	1,830	1,842	...	...	...	...	...	...	...
Calves	...	...	...	...	...	...	...	...	...
FINLAND - Adult cattle	579	555	551	569	+ 3.3	...	...	...	...
Calves	100	93	65	602	- 7.7	...	...	...	...
HUNGARY[3] - Adult cattle	426	427	463	406	-12.4	355	-12.6	...	...
Calves	6	3	3	4	+37.0	4	0.0	...	...
JAPAN - Adult cattle	1,322	1,355	1,388	1,492	+ 7.5	...	...	...	...
Calves	44	44	45	44	- 2.2	...	...	...	...
NEW ZEALAND[4] - Adult cattle	2,019	2,256	2,111	1,891	-10.4	1,997	+ 5.6	2,097	...
Calves	1,017	1,004	896	817	- 8.8	834[3]	...	875[3]	...
NORWAY[3] - Adult cattle	331	359	335	311	- 7.2	316	+ 1.6	309	...
Calves	27	55	62	57	- 8.1	54	- 5.3	46	...
POLAND - Adult cattle	2,500	3,120	3,008	3,134	+ 4.2	...	...	...	...
Calves	1,438	1,654	1,611	1,520	- 5.6	...	...	...	...
ROMANIA[3] - Adult cattle	1,312	1,239[5]	...	1,416	...	...	...	...	...
Calves	53	...	...	...	...	...	...	...	...
SOUTH AFRICA - Adult cattle	2,015	2,215	2,215	2,358	+ 6.5	2,340	- 0.8	2,298	2,330
Calves	89	95	99	102	+ 3.0	100	- 2.0	98	105
SWEDEN - Adult cattle	584	607	603	577	- 4.3	586	+ 1.6	567	...
Calves	117	111	114	123	+ 7.9	134	+ 8.9	143	...
SWITZERLAND[3] - Adult cattle	443	460	436	469	+ 4.8	...	...	...	...
Calves	375	367	341	346	+ 1.2	...	...	...	...
TUNISIA[5] - Adult cattle	188	232	244	221	- 9.4	119[7]	...	230	...
Calves	-	-	-	-	-	-	-	-	-
UNITED STATES[1] - Adult cattle	37,751	38,864	39,725	40,874	+ 4.1	39,232	- 4.0	36,682	...
Calves	2,798	3,021	3,076	3,292	+ 7.0	3,230	- 1.9	2,885	...
URUGUAY - Adult cattle	1,796	2,019	2,057	1,418	-31.1	1,230	-13.3	1,222	...
Calves	186	200	171	85	-50.3	85	0.0	86	...
YUGOSLAVIA - Adult cattle	1,269	1,397	1,444	1,540	+ 6.6	...	...	...	...
Calves	1,065	1,053	840	862	+ 2.6	...	...	...	...

[1] Commercial slaughter. Represents, on average, 99 per cent of total slaughter

[2] Total cattle and buffaloes

[3] Inspected only

[4] Year ended 30 September

[5] Total slaughter

[6] EC-12, as of 1986

[7] At 30 June 1985

TABLE 3 - Beef and Veal Production ('000 Metric Tons, Carcass Weight)

Country	1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84	Forecast 1986	Forecast 1987
ARGENTINA - Beef	2,749	2,426	2,294	2,428	+ 5.8	2,580	+ 6.3	2,530	...
- Veal	190	125	90	130	+44.4	180	+38.5	150	...
AUSTRALIA - Beef	1,372	1,621	1,360	1,209	-11.1	1,270[1]	+ 1.8[1]	1,297	1,312
- Veal	49	57	52	38	-26.0	...	...	43	45
AUSTRIA - Beef	189	184	188	...	...	...	...	...	...
- Veal	17	16	16	...	...	...	...	...	...
BRAZIL[1] - Beef	2,115	2,385	2,359	2,153	- 8.7	2,200	+ 2.2	2,300	2,300
- Veal	...	...	...	...	...	...	...	...	...
BULGARIA - Beef	35	37	37	37	0.0	109[1,5]	- 1.8[1]	110[1,5]	...
- Veal	66	72	73	74	+ 1.4	...	...	...	...
CANADA - Beef	980	991	945	953	+ 0.8	991	+ 4.0	961	940
- Veal	36	40	42	45	+ 7.2	44	- 2.2	43	41
COLOMBIA[1] - Beef	652	613	564	599	+ 6.1	620	+ 3.5	633	...
- Veal	...	...	...	...	...	...	...	...	...
EEC - Beef	6,178	5,895	6,116	6,630	+ 8.4	6,415	- 3.2	7,100[1]	...
- Veal	756	761	800	869	+ 8.6	835	- 3.9	...	...
EGYPT[3] - Beef	238	239	...	...	...	...	...	...	...
- Veal	...	...	...	...	...	...	...	...	...
FINLAND - Beef	120	115	118	123	+ 4.9	127	+ 3.3	126	...
- Veal	1.6	1.4	0.9	0.9	- 2.3	1	+11.1	1	...
HUNGARY - Beef	123	124	138	130	- 5.8	54[6]	+ 0.4[6]	...	...
- Veal	0.1	0.1	0.1	0.2	+42.9	...	...	...	...
JAPAN - Beef	468	479	492	533	+ 8.3	555[5]	+ 3.7[5]	565[5]	...
- Veal	2	2	2	2	0.0	...	...	...	...
NEW ZEALAND[4] - Beef	477	509	475	445	- 6.3	514[1]	+11.7[1]	521[1]	...
- Veal	18	21	18	14	-22.2	...	...	...	...
NORWAY[2] - Beef	74	77	72	67	- 7.1	70	+ 4.5	71	...
- Veal	1.7	2.8	2.4	2.2	- 8.3	2	+ 4.5	2	...
POLAND - Beef	453	583	559	604	+ 8.1	663[1]	+ 2.0[1]	...	...
- Veal	44	56	51	46	- 9.8	...	...	...	...
ROMANIA - Beef	221	196[1]	...	234	...	...	...	...	...
- Veal	1.4	...	...	...	...	...	...	...	...
SOUTH AFRICA - Beef	527	609	628	657	+ 4.6	675	+ 2.7	692	715
- Veal	4.0	3.9	4.4	4.7	+ 6.8	5	+ 6.4	4	5.0
SWEDEN - Beef	147	151	151	144	- 4.6	145	+ 0.7	143	...
- Veal	12	9	9	11	+22.2	11	0.0	13	...
SWITZERLAND - Beef	117	122	117	128	+ 9.4	131	+ 2.3	130	...
- Veal	38	38	36	37	+ 4.5	40	+ 8.1	39	...
TUNISIA[1] - Beef	33	29	27	29	+ 7.4	32	+10.3	35	...
- Veal	-	-	-	-	-	-	-	-	-
UNITED STATES - Beef	10,156	10,223	10,543	10,622	+ 0.7	10,647	+ 0.2	9,888	...
- Veal	198	203	206	217	+ 5.3	213	- 1.8	184	...
URUGUAY - Beef	398[1]	407[1]	427	301	-29.5	319[1]	+ 2.9[1]	280[1]	...
- Veal	...	...	15	7	-53.3	...	...	...	...
YUGOSLAVIA[1] - Beef	341	362	357	371	+ 3.9	...	...	...	...
- Veal	...	...	...	...	...	...	...	...	...

[1] Total production, beef and veal. Breakdown not available

[2] Production from verified or inspected slaughter

[3] Includes buffalo meat

[4] Year ended 30 September

[5] Secretariat estimate

[6] January-June

TABLE 4 - Stocks of Beef and Veal ('000 Metric Tons, Carcass Weight)

Country	1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84	Forecast	
								1986	1987
ARGENTINA	68.0	66.0	55.0	10.0[4]	- 80.4[4]	...	...	...	...
AUSTRALIA[1]	48.3	32.7	28.0	24.4	- 12.9	...	...	...	...
AUSTRIA	5.0	4.0	4.0	...	...	...	...	...	...
BRAZIL	263.0	204.0	160.0	20.0	- 87.5	15	-25.0	50	...
CANADA[2]	31.8	20.2	17.3	22.3	+ 28.9	19.7	-11.7	18.8	16.6
EEC[3]	235.0	255.0	432.0	810.0	+ 87.5	782.0	- 3.5	652.0[5]	...
FINLAND	5.6	7.6	5.7	5.1	- 11.3	...	...	...	...
HUNGARY	1.3	1.4	1.3	4.3	+ 230.8	8.0	+86.0	...	...
NEW ZEALAND	45.5	50.1	39.5	47.0	+ 19.0	44.5	- 5.3	44.5	...
NORWAY	7.4	6.2	6.2	3.5	- 43.5	...	...	...	...
SOUTH AFRICA	1.3	4.5	15.0	35.1	+ 134.3	5.0	-85.8	3.0	2.5
SWEDEN	13.0	6.0	9.0	14	+ 55.6	12	-14.3	10	...
SWITZERLAND	3.5	3.1	0.5	8.3	+ 1,560.0	4.0	-51.8	3.0	...
TUNISIA	1.5	1.8	2.6	2.0	- 23.1	1.5	-25.0	1.2	...
UNITED STATES	109.3	115.6	136.5	168	+ 23.1	139.0	-17.3	139.0	...
URUGUAY	19.0	26.0	21.0	10	- 52.4	10.0	0.0	...	...

[1] Stocks at last Saturday of last month of quarter. Stocks are largely in boneless form and figures refer only to those held in cold stores registered to handle meat for export.

[2] Stocks at 1 January

[3] Includes intervention and private stocks.

[4] January-June

[5] EC-12 as of 1986

Note: Stocks at the end of the year, if not otherwise specified.

TABLE 5 - Beef and Veal Consumption ('000 Metric Tons, Carcass Weight and kg./Capita)

Country		1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84	Forecast 1986	Forecast 1987
ARGENTINA	- Total	2,420	2,031	1,975	2,338	+18.4	2,500	+ 6.9	2,330	...
	- per capita	85.0	70.0	67.0	77.0	+14.9	82.0	+ 6.5	75.0	...
AUSTRALIA	- Total	709	750	651	638	- 2.0	600	- 6.0	614	629
	- per capita	47.5	49.4	42.3	41.0	- 5.1	38.3	- 6.6	38.6	39.1
AUSTRIA	- Total	189	184	174.5	...	...	...	...	...	
	- per capita	25.1	24.5	23.1	...	...	...	...	...	
BRAZIL	- Total	1,882	2,043	2,000	1,860	- 7.0	1,917	+ 3.1	1,959	2,000
	- per capita	15.4	16.3	15.5	14.0	- 9.7	14.4	+ 2.9	14.7	15.1
BULGARIA	- Total	95	...	...	98.5	...	103.0	+ 4.6	...	...
	- per capita	10.6	...	...	11.0	...	11.5	+ 4.6	...	...
CANADA	- Total	1,030	1,039	1,039	1,010	- 2.8	1,021	+ 1.1	990	970
	- per capita	42.3	42.1	41.7	40.1	- 3.8	40.0	- 0.2	38.6	38.0
COLOMBIA	- Total	630	595	551	593	+ 7.7	616	+ 3.9	630	...
	- per capita	24.0	21.9	19.2	20.7	...	...	...	...	...
EEC	- Total	6,770	6,600	6,620	6,800	+ 2.7	6,950	2.2	7,000	...
	- per capita	25.0	24.3	24.4	25.0	+ 2.5	25.5	+ 2.0	25.5	...
FINLAND	- Total	105	106	104	106	+ 2.0	102	+ 3.8	102	...
	- per capita	21.9	22.0	21.4	21.7	+ 1.4	21	- 3.2	21	...
HUNGARY	- Total	101	99	89	74	-16.9	70.0	- 5.4	...	...
	- per capita	9.4	9.3	8.3	7.0	-15.7	7.4	+ 5.7	...	...
JAPAN	- Total	662	671	706	757	+ 7.2	790[2]	+ 4.3[2]	816[2]	...
	- per capita	5.6	5.6	5.9	6.3	+ 6.8	6.5[2]	+ 3.2	6.7[2]	...
NEW ZEALAND[1]	- Total	148	155	142	135	- 4.2	118	-13.2	115	...
	- per capita	46.5	43.0	42.1	39.5	- 6.2	35.9	- 9.1	35.7	...
NORWAY	- Total	71	76	69	72	+ 4.3	74	+ 2.8	75	...
	- per capita	17.3	18.7	16.7	17.3	+ 3.6	17.9	+ 3.5	18.3	...
POLAND	- Total	558	519	580	585	+ 0.9	585	0.0	...	...
	- per capita	15.6	14.4	15.8	15.8	0.0	15.8	0.0	...	...
ROMANIA	- Total	244	...	...	...	...	...	...	...	
	- per capita	11.0	...	...	...	...	...	...	...	
SOUTH AFRICA	- Total	617	663	664	682	+ 2.7	721	+ 5.6	734	760
	- per capita	20.4	21.3	20.8	20.8	0.0	21.4	+ 2.9	21.1	21.2
SWEDEN	- Total	145	141	141	132	- 6.4	137	+ 3.8	140	...
	- per capita	17.4	16.9	16.9	15.8	- 6.5	16.4	+ 3.8	16.8	...
SWITZERLAND	- Total	180	176	169	173	+ 2.3	181	+ 4.6	179	...
	- per capita	27.6	26.8	25.7	26.3	+ 2.3	27.5	+ 4.6	27.2	...
TUNISIA	- Total	48	50	53	59	+11.3	59	0.0	60	...
	- per capita	6.2	6.8	7.6	8.4	+10.5	8.3	- 1.2	8.1	...
UNITED STATES	- Total	11,084	11,182	11,492	11,597	+ 0.9	11,690	+ 0.8	10,882	...
	- per capita	48.2	48.2	49.1	49.5	+ 0.8	49.4	- 0.2	45.6	...
URUGUAY	- Total	227	230	215	177	-17.7	184	+ 4.0	190	...
	- per capita	78.0	78.0	72.0	59.0	-18.1	51.1[2]	-13.4[2]	51.7	...
YUGOSLAVIA	- Total	327	332	325	337	+ 3.7	...	...	...	...
	- per capita	15.1	15.2	14.8	14.7	- 0.7	...	...	...	...

[1] Year ended 30 September
[2] Secretariat estimate

TABLE 6 - Imports of Live Cattle and Calves[1] ('000 Head)

(Carcass weight equivalent where available appears in brackets in '000 metric tons)

Country	1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84	Forecast 1986	Forecast 1987
BRAZIL	16.0 (3.3)	12.0 (2.3)	21.0 (3.5)	35.0 (5.9)	+66.7 (+68.6)	6 (1.2)	-82.9 (-79.7)	... (...)	... (...)
CANADA	156.0 (41.2)	79.0 (20.6)	84.0 (22.2)	37.0 (9.8)	-56.0 (-55.9)	65 (19.8)	+75.7 (+102.0)	75 (22.8)	... (...)
EEC	311.0 (50.0)	488.0 (66.0)	505.0 (64.0)	428 (54.0)	-15.2 -15.6	390 (50.0)	-8.9 (-7.4)	390[3] (50.0)	... (...)
EGYPT	89.3 (...)	120.7 (...)	123.1 (...)	... (...)	... (...)	... (...)	... (...)	... (...)	... (...)
HUNGARY	10.8 (1.7)	- (...)	16.3 (2.4)	68.1 (10.0)	+317.7 (+316.7)	... (...)	... (...)	... (...)	... (...)
JAPAN	13.3 (4.0)	4.5 (1.0)	5.6 (2.0)	5.8 (2.0)	+3.6 (0.0)	... (...)	... (...)	...	... (...)
ROMANIA	13.7 (4.8)	1.5 (0.4)	... (...)	- (-)	... (...)	... (...)	... (...)	... (...)	... (...)
SOUTH AFRICA	343.0 (71.6)	191.0 (39.5)	126.0 (26.2)	113.0 (23.2)	-10.3 (-11.5)	120 (25.0)	+6.2 (+7.8)	118 (24.0)	120 (25.0)
SWITZERLAND	7.0 (1.3)	4.5 (0.8)	4.5 (0.8)	5.2 (0.9)	+15.6 (+12.5)	6.0 (1.4)	+15.4 (+55.5)	5.0 (1.2)	... (...)
TUNISIA	41.7 (9.6)	45.1 (11.1)	52.1 (12.9)	60.0 (12.7)	(+15.2) (-1.6)	28.0 (6.2)	-53.3 -51.2	27.0 (6.0)	... (...)
UNITED STATES	659.0 (...)	1,005.0 (...)	921.0 (...)	753.0 (...)	-18.2 (...)	600 (...)	-20.3 (...)	600 (...)	... (...)
YUGOSLAVIA	- (...)	- (...)	... (...)	... (0.1)[2]	... (0.0)	0 (0)	... (-100.0)	... (...)	... (...)

[1]Excluding breeding cattle
[2]January-June
[3]EC-12 as of 1986

TABLE 7 - Imports of Fresh, Chilled and/or Frozen Beef and Veal

(1000 metric tons, carcass weight equivalent)

Country	1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84	Forecast	
								1986	1987
AUSTRALIA	2.8	3.2	3.4	3.9	+14.7	...	...	...	...
AUSTRIA	12.0	9.0	5.0	3.0[1]	0.0[1]	...	...	...	...
BRAZIL	60.6	21.0	25.4	36.9	+45.3	11.6	-68.6	...	...
BULGARIA	1.6	0.2	0.1	0.1	0.0	...	...	...	...
CANADA	73.0	77.4	79.6	106.4	+33.7	106.0	-0.4	112.0[2]	...
EEC	176.0	236.0	240.0	213.0	-11.3	215.0	+0.9	220.0[3]	...
EGYPT[2]	108.9	97.0	77.6	...	...	...	...	...	...
FINLAND	-	-	1.0	-	-	-	-	...	...
HUNGARY	12.9	14.3	11.2	7.2	-41.7	0.1[1]	-97.8[1]	...	...
JAPAN	177.0	175.0	196.0	207.0	+5.6	220.0[4]	+6.3	236.0[4]	...
NORWAY	3.8	1.1	1.3	1.7	+30.8	1.0	-41.2	1.0	...
POLAND (frozen only)	89.0	6.3	1.5	14.4	+860.0	3.8	-73.6	1.5	...
ROMANIA	52.0	17.1	...	-	...	...	...	...	...
SOUTH AFRICA	19.9	19.6	23.0	25.1	+9.1	23.5	-6.4	22.5	24.0
SWEDEN	4.6	6.2	7.2	5.1	-29.2	6.0	+17.6	6.0	...
SWITZERLAND	11.1	9.2	11.5	10.6	-7.8	8.5	-19.8	9.3	...
TUNISIA	5.5	4.7	11.4	15.2	+33.3	14.6	-3.9	11.7	...
UNITED STATES	733.5	817.4	8[illegible].3[2]	838.0[2]	-5.2	885.0[2]	+5.6	902.0[2]	...
YUGOSLAVIA	30.7	30.2	42.3	24.0	-43.3	5.2[1]	...	...	...

[1]January-June
[2]Total beef and veal imports. Breakdown not available
[3]EC-12 as of 1986
[4]Secretariat estimates

TABLE 8 - Imports of Beef and Veal other than Fresh, Chilled and/or Frozen

(Canned, Cooked, etc.)

(1000 metric tons, carcass weight equivalent)

Country	1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84	Forecast	
								1986	1987
AUSTRALIA[1]	0.6	0.4	0.6	0.6	0.0	...	...	...	...
BRAZIL	0.3	-	-	-	-	-	0.0	...	...
BULGARIA	-	0.1	0.1	0.1	0.0	...	...	...	...
CANADA	7.7	10.8	12.1	9.9	-18.2	6.0	-39.4	...	...
EEC	138.0	138.0	144.0	147.0	+2.1	145.0	-1.4	150.0[2]	...
HUNGARY	0.2	0.1	1.0	0.1	-90.0	...	...	...	...
JAPAN	14.0	15.0	15.0	15.0	0.0	15.0	0.0	15.0	...
POLAND	0.4	0.7	0.5	0.2	-60.0	0.1	-50.0	-	...
SWEDEN	0.2	0.4	0.4	0.3	-25.0	0.5	+66.6	0.5	...
SWITZERLAND	2.1	2.1	2.9	3.1	+6.9	1.5	-35.5	2.7	...
UNITED STATES	91.3	87.8	...	...	...	...	...	...	...
URUGUAY	-	8.0	8.0	2.0	-75.0	8.0	+300.0	0.0	...

[1]Includes canned corned beef, canned steak and kidney
[2]EC-12 as of 1986

TABLE 9 - Exports of Live Cattle and Calves[1]

('000 head: carcass weight equivalent where available, appear in brackets in '000 metric tons)

Country	1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84	Forecast 1986	Forecast 1987
AUSTRALIA	59.4 (11.9)	56.3 (11.3)	47.2 (9.4)	36.6 (7.3)	-22.5 (-22.3)	65 (13.0)	+77.6 +78.1	70 (14.0)	70 (14.0)
AUSTRIA	26.0 (16)	20.0 (12)	17.0 (11)	11.0[2] (...)	0.0[2] (...)	... (...)	... (...)	... (...)	... (...)
BULGARIA	5.0 (2.2)	25.6 (11.1)	27.8 (11.9)	24.5 (10.8)	-11.9	... (...)	... (...)	... (...)	... (...)
CANADA	133.0 (35.0)	223.0 (57.6)	212.0 (56.4)	250.0 (66.0)	+17.9 (+17.0)	180 (49.4)	-28.0 -25.2	103 (28.3)	... (...)
COLOMBIA	3.1 (...)	0.8 (...)	- (...)	0.1 (...)	- (...)	0.4 (...)	+300.0 (...)	- (...)	... (...)
EEC	401.0 (100)	342.0 (88)	398.0 (103)	367.0 (96)	-7.8 -6.8	350 (90.0)	-4.6 -6.3	350[3] (90.0)	... (...)
FINLAND	1.0 (...)	- (...)	- (...)	- (...)	- (...)	- (...)	- (...)	... (...)	... (...)
HUNGARY	146.0 (42.8)	187.0 (54.5)	205.0 (57.9)	208.0 (60.7)	+1.4 (+4.8)	... (...)	... (...)	... (...)	... (...)
POLAND	144.0 (22.1)	230.0 (24.2)	304.0 (33.8)	290.0 (39.1)	-4.6 (+15.7)	330 (43.6)	+13.8 +11.5	330 (40.0)	330 (40.0)
ROMANIA	54.4 (11.3)	13.5 (3.0)	... (...)	15.7 (...)	... (...)	... (...)	... (...)	... (...)	... (...)
UNITED STATES	88.0 (...)	57.0 (...)	56.0 (...)	71.0 (...)	+27.5 (...)	100 (...)	40.8 (...)	90 (...)	... (...)
URUGUAY	0.0 (...)	7.0 (1.0)	35.0 (7.0)	0.0 (...)	-100.0 (...)	0 (...)	0.0 (...)	0 (...)	... (...)
YUGOSLAVIA	... (...)	... (36.2)	... (29.8)	... (14.1)[2]	... (...)	... (22)[2]	... (+56.0)	... (...)	... (...)

[1]Excluding breeding cattle

[2]January-June

[3]EC-12 as of 1986

TABLE 10 - Exports of Fresh, Chilled and/or Frozen Beef and Veal

('000 metric tons carcass weight equivalent)

Country	1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84	Forecast	
								1986	1987
ARGENTINA	328.0	359.0	262.0	125.0	-52.3	119.0	-4.8	200	...
AUSTRALIA	672.0	898.0	726.0	575.0	-20.8	650.0	+13.0	680	688
AUSTRIA	19.0	23.0	28.0	20.0[1]	+53.8	...	...	...	...
BRAZIL	61.8	124.6	159.9	153.3	-4.1	450.0[3]	-6.0[3]	400[3]	...
BULGARIA	13.4	10.6	12.5	12.5	0.0	6.0[5]	-52.0	7	...
CANADA	74.8	79.5	79.0	101.9	+29.0	112.0	+9.9	78	...
COLOMBIA	22.7	18.2	12.6	5.2	-58.4	3.2	-39.0	10.0	...
EEC	524.0	355.0	462.0	650.0	+40.7	640.0	-1.5	610[4]	...
FINLAND	15.0	7.0	14.0	14.0	-0.7	14.0	0.0	20[3]	...
HUNGARY	45.0	48.0	44.0	50.0	+14.1	19.0[1,3]	-15.5[1,3]	...	...
NEW ZEALAND[2]	345.0	357.0	368.0	284.0	-22.8	362.0	+27.5	402	...
NORWAY	1.1	5.0	7.2	2.0	-72.2	17.0[3]	+750.0	...	...
POLAND	5.3	3.8	6.6	5.8	-12.1	8.7	+50.0	9	11
ROMANIA	25.0	12.4	...	38.6[3]	...	...	...	...	...
SOUTH AFRICA	0.6	-	1.3	1.9	+46.2	32.0	+1,584.2	5	4
SWEDEN	12.7	33.6	22.9	22.6	-1.3	23.5	+4.0	27	...
SWITZERLAND	-	0.8	0.7	0.0	-100.0	1.5[3]	...	1[3]	...
UNITED STATES	94.0	107.9	106.0	152.0[3]	+21.6[3]	158.0[3]	+3.9[3]	172[3]	...
URUGUAY	166.0	161.0	222.0	131.0	-41.0	139.0[3]	-3.5	90[3]	...
YUGOSLAVIA	21.4	43.8	36.8	42.0	+14.1	34.8[1]	...	...	...

[1] January-June
[2] Year ended 30 September
[3] Total beef and veal. Breakdown not available
[4] EC-12 as of 1986
[5] Secretariat estimates

TABLE 11 - Exports of Beef and Veal other than Fresh, Chilled and/or Frozen (Canned, Cooked, etc.)

('000 metric tons carcass weight equivalent)

Country	1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84	Forecast	
								1986	1987
ARGENTINA	158.0	163.0	153.0	125.0	-18.3	141.0	+12.8	150.0	...
AUSTRALIA	28.0	24.0	31.0	42.0	+35.5	40.0	-4.8	40.0	40.0
BRAZIL	231.3	237.2	303.6	325.4	+7.2	...	...	...	...
CANADA	2.8	2.4	2.3	1.9	-17.4	2.0	+5.3	2.0	...
EEC	38.0	38.0	38.0	44.0	+15.8	50.0	+13.6	50.0[2]	...
FINLAND	1.0	1.0	3.0	5.0	+66.7	8.0	+60.0	...	...
HUNGARY	6.4	6.4	4.1	6.3	+53.7	...	...	...	...
NORWAY	0.5	1.1	0.1	0.1	0.0	...	...	...	...
POLAND	2.8	3.1	4.9	5.7	+16.3	5.5	-3.5	6.0	60.0
ROMANIA	9.9	4.9	...	...	...	...	...	...	....
SWEDEN	0.2	0.8	0.7	1.1	+57.1	2.5	+127.3	1.5	...
SWITZERLAND	0.6	0.5	0.4	0.4	+5.7	...	...	...	...
UNITED STATES	11.5	13.0	19.0	...	...	...	...	...	...
URUGUAY	7.0	8.0	10.0	13.0	+30.0	...	...	...	...
YUGOSLAVIA	6.5	4.5	4.6	2.2[1]	+4.8[1]	2.2[1]	0.0	...	...

[1] January-June
[2] EC-12 as of 1986

TABLE 12 - Beef Prices - Average Price Received by Producers
- Average Retail Price for Beef (in brackets)

Country	1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84
ARGENTINA (Pesos/100 kg.)	3,348 (12,340)	15,399 (48,575)	6,69[2] (18.84)[2]	43.24 (120.05)	+546.3 (+537.2)	144,750[3] (450,000)[3]	+551.4[3] +619.1[3]
AUSTRALIA (Australian cents/kg.)	126.9 (643.1)	114.7 (633.0)	150.2 (737.7)	166.7 (764.6)	+11.0 (+3.6)	172.0[5] (788.2)[5]	+3.2[5] +4.6[5]
AUSTRIA (S/100 kg.)	2,293 (13,200)	2,434 (14,100)	2,553 (14,810)	... (...)	... (...)	(...) (...)	... (...)
BRAZIL (Cruzeiros/100 kg.)	1,439.3 (3,180.0)	1,226.6 (2,940.0)	1,532.0 (3,360.0)	1,667.1 (3,288.0)	+8.8 (-2.1)	1,159.0[6] (3,190.0)[6]	... ...
CANADA (Can$/100 kg.)	126.6 (837.1)	119.0 (852.0)	121.1 (871.9)	126.7 (974.8)	+4.1 (+11.8)	129.2[3] (1,012.0)[3]	-0.3[3] (+6.4)[3]
COLOMBIA (Pesos/100 kg.)	... (17,439)	... (22,695)	... (28,945)	... (...)	... (...)	... (...)	... (...)
EEC (ECU/100 kg.)	145 (...)	160 (...)	161 (...)	156 (...)	-3.5 (...)	158 (...)	+1.3 (...)
EGYPT (Piastres/kg.)	... (264.9)	... (308.8)	... (414.9)	... (...)	... (...)	... (...)	... (...)
FINLAND (FIM/100 kg.)	1,774 (2,908)	1,984 (3,307)	2,130 (3,710)	2,317 (4,049)	+8.8 +9.1	2,439[3] (4,305)[3]	+6.2[3] (+8.3)[3]
HUNGARY (Ft/100 kg.)	43.0 (59.0)	43.0 (62.0)	44.0 (62.0)	45.7 (78.0)	+3.9 (+25.8)	45.7[3] (78.0)[3]	0.0[3] (0.0)[3]
JAPAN (Yen/100 kg.)	43,800 (336,000)	46,800 (342,000)	46,300 (351,000)	44,000 357,000	-5.0 +1.7	45,300[3] (348,350)[3]	+3.7[3] (-1.3)[3]
NEW ZEALAND[1] ($NZ/100 kg.)	107 (386)	125 (416)	136 (458)	147.5 (500)	+8.5 (+9.2)	... (...)	... (...)
NORWAY (NOK/100 kg.)	2,683 (5,146)	2,773 (5,590)	2,744 (6,509)	2,972 (7,283)	+8.3 (+11.9)	3,111[3] (...)	+9.5[3] (...)
POLAND (Zl/100 kg.)	5,486 (8,000)	8,973 (25,000)	10,030 (25,000)	11,570 (30,000)	+15.4 (+20.0)	...[3] (34,000)[3]	... (+13.3)[3]
SOUTH AFRICA (Rand/100 kg.)	212.5 (473.6)	211.2 (530.2)	215.0 (546.3)	226.5 (583.0)	+5.3 (+6.7)	254.2[3] (627.7)[3]	+14.0[3] (+6.1)[3]
SWEDEN (SEK/100 kg.)	1,763 (5,204)	1,908 (5,920)	1,974 (6,737)	2,027 (8,267)	+2.7 (+22.7)	1,932[3] (8,524)[4]	-6.4[3] (+3.8)[4]
SWITZERLAND/Sw F/100 kg.)	533 (1,616)	547 (1,722)	565 (1,766)	576 (1,846)	+1.9 (+4.5)	560[3] (1,841)[3]	-2.4[3] (+1.0)[3]
TUNISIA (Dinars/100 kg.)	135 (180)	155 (180)	190 (220)	210 (250)	+10.5 (+13.6)	240 (320)	+14.3 (+28.0)
UNITED STATES (US$/100 kg.)	141 (526)	140 (534)	138 (525)	144 (528)	+4.3 +0.6	128[6] (517)[6]	-11.5[6] (-2.7)[6]
URUGUAY (Pesos/100 kg.)	1,085 (1,993)	1,031 (1,901)	2,166 (2,778)	4,781 5,552	+120.7 +99.8	7,088[3] (7,632)[3]	+52.0[3] (+73.1)[3]
YUGOSLAVIA (Din/100 kg.)	90,430 (114,000)	114,500 (152,000)	168,700 (243,000)	232,770 (322,000)	+38.0 (+32.5)	346,747[4] (483,000)	+52.8[4] (+54.3)[4]

[1] Year ended 30 September
[2] New Argentinian peso since 1983
[3] January-June
[4] January-September
[5] Forecast
[6] January-August

Notes: See notes on pages 69-70.

TABLE 13 - Beef Prices - Average or Representative Export Prices (f.o.b.)
- Average or Representative Import Prices (c.i.f.) (in brackets)

(US$/100 kg.)

Country	1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84
ARGENTINA	183	139	131	127	-3.1	74[1]	-41.8[1]
AUSTRALIA (A cents/kg.)	206.2 (356.8)	137.8 (250.5)	188.2 (264.7)	222.2 (260.6)	+18.1 (-1.5)	174.2[1] (218.1)[1]	-19.2[1] (-16.6)[1]
AUSTRIA (S/100 kg.)	4,602 (2,482)	4,583 (5,146)	4,307 (5,196)	... (...)	... (...)	... (...)	... (...)
BRAZIL	259 (121)	201 (105)	173 (80)	171[1/] (53)[1/]	... (...)	... (...)	... (...)
CANADA	201.7 (239.3)	208.1 (216.5)	188.1 (230.3)	188.2 (229.1)	(+0.1) (-0.5)	184.2[3] (220.9)[3]	-5.4[3] (-7.2)[3]
COLOMBIA	1,904	2,111	2,242	...	...	...	...
EEC (ECUs/ton)	1,400 (...)	1,400 (...)	1,400 (...)	1,417 (...)	+1.2 (...)	1,303 (...)	-8.0 (...)
HUNGARY	205.6 (112.7)	168.0 (120.6)	159.0 (105.4)	107.1 (73.8)	-32.6 (-30.0)	89.5[1] (-)	-18.6[1] (-)
JAPAN	(327.4)	(321.8)	(324.9)	(315.0)	(...)	(318.5)[1]	(+0.8)[1]
NORWAY	227 (277)	541 (292)	361 (264)	372 (287)	+3.0 +8.7	575[1] (287)[1]	... (...)
POLAND	225 (135)	187 (93)	155 (98)	134 (84)	-13.5 (-14.3)	103[1] (-)	-29.0[1] (-)
SWEDEN	225 (489)	148 (489)	196 (394)	161 365	-17.9 (-7.4)	146[1] (366)[2]	-10.5[1] (+0.3)[2]
SWITZERLAND	(821)	(620)	(616)	(580.0)	(-5.8)	(897)[3]	(+41.3)[3]
TUNISIA	(275)	(187)	(157)	(165)	(+5.1)	(172)	(+4.2)
UNITED STATES	... (...)	... (...)	... (...)	... (...)	... (...)	... (...)	... (...)
URUGUAY	177	143	122	109	-2.8	108	...

[1] January-June
[2] January-September
[3] April-June

Note: See notes on pages 69-70.

NOTES ON TABLES 12 and 13

	AVERAGE PRICE RECEIVED BY PRODUCERS	AVERAGE RETAIL PRICE FOR BEEF	AVERAGE OR REP. EXPORT PRICE	AVERAGE OR REP. IMPORT PRICE
ARGENTINA	Steer, live weight, Liniers	Sirloin steak, Buenos Aires	Frozen boneless cow grade beef	-
AUSTRALIA	Weighted average price capital city saleyards (carcass weight)	Beef, rump steak: weighted average of six State capital cities (to June 1982), of eight capital cities from July 1982	Average of total beef and veal including canned	Bovine meat
AUSTRIA	Average domestic price of 100 kg. of slaughter cattle	National average retail price of strip loin	Ratio between value and quantity of total exports of beef and veal, fresh and chilled (free-at-frontier)	Ratio between value and quantity of total imports of beef and veal fresh and chilled (free-at-frontier)
BRAZIL	Real price - average of ten counties of State of Sao Paulo	Year-long average for rump steak - real price	Frozen boneless beef	Frozen boneless beef
CANADA	All slaughter cattle, Canada	Sirloin steak, Canada	Frozen boneless beef	Frozen boneless beef
COLOMBIA	...	...	Carcass weight equivalent	...
EUROPEAN ECONOMIC COMMUNITY	Market price (wholesale) 100 kg. live weight	...	Free-at-Community - frontier offer price	...
EGYPT	...	Boneless beef	...	...
FINLAND	...	Average of different cuts	...	...
HUNGARY	Bull, Class I	Sirloin, bone-in	Frozen or fresh beef, carcass bone-in	Frozen or fresh beef carcass bone-in
JAPAN	Dairy cow, live weight, fiscal year	Tokyo, middle grade, product weight basis	-	Product weight basis

NOTES ON TABLES 12 and 13 (cont'd)

	AVERAGE PRICE RECEIVED BY PRODUCERS	AVERAGE RETAIL PRICE FOR BEEF	AVERAGE OR REP. EXPORT PRICE	AVERAGE OR REP. IMPORT PRICE
NEW ZEALAND	Annual average prices are for the year ending 30 September. Annual prices are weighted averages.	Prime rib	...	...
NORWAY	Net slaughter price Ox, Class I, delivered at slaughterhouses in Oslo	Fresh beef, first quality cut	Ratio between value and quantity of exports	Ratio between value and quantity of imports
POLAND	Live weight	Boneless roast beef	Hind quarters, frozen or chilled	Compensated beef carcass, frozen
ROMANIA	...	...	...	...
SOUTH AFRICA	Average for all grades and all markets	Beef sirloin Super A	...	...
SWEDEN	Slaughtered weight, average prices for cattle, all grades, on the Swedish market	Representative basket of beef products in the retail trade	Frozen boneless beef	Frozen boneless beef
SWITZERLAND	Heifers and steers IA, free market	Beef for boiling and stewing	...	Frozen boneless beef
TUNISIA	...	Sirloin	...	Frozen boneless beef
UNITED STATES	Slaughter steers, Omaha Choice	Estimated weighted average price of retail cuts from Choice Yield Grade 3 carcass	Frozen boneless beef	Imported cow meat 85 per visible lean, f.o.b. port of entry
URUGUAY	Dressed carcass weight. Weighted average of all classes of cattle	Weighted average price per steer/cow	Boneless quarters and cuts, carcass weight	-
YUGOSLAVIA	...	...	...	...

TABLE 14 - Pigmeat Production ('000 metric tons, carcass weight equivalent)

Country	1981	1982	1983	1984	% change 1984/83	Estimates 1985	% change 1985/84	Forecast	
								1986	1987
ARGENTINA	254.0	230.0	207.0	210.0	+1.4	200.0	-4.8	...	..
AUSTRALIA	230.5	229.8	246.2	256.0	+4.0	262.0	+2.3	268.0	275.0
BRAZIL	604.4	520.4	559.3	477.4[1]	-15.2	222.6[1]	..	550.0	550.0
CANADA	840.4	832.7	852.0	862.5	-1.2	688.3	+3.0	853.0	..
EEC	10,238.0	10,206.0	10,508.0	10,592.0	+0.8	10,720.0	+1.2	12,450.0[2]	..
FINLAND	180.2	180.6	177.2	170.5	-3.8	172.0	+0.9	172.0	..
HUNGARY	567.5	603.5	653.8	691.4	+5.8	...	..	...	..
JAPAN	1,396.0	1,428.0	1,429.0	1,430.0	+0.1	721.0[1]	..	...	..
NEW ZEALAND	32.7	35.3	38.8	44.1	+13.7	45.0	+2.0	45.0	..
NORWAY	82.9	81.1	81.3	84.4	+3.8	85.8	+1.7	87.2	..
POLAND	1,116.0	1,219.0	1,133.0	1,057.0	-6.7	...	..	...	..
SOUTH AFRICA	93.0	104.0	117.8	114.0	-3.2	116.0	+1.8	120.0	124.0
SWEDEN	320.5	325.0	318.3	323.5	+1.6	327.0	+1.1	314.0	..
SWITZERLAND	267.9	281.6	282.9	268.6	-5.1	275.0	+2.4	270.0	..
UNITED STATES	7,199.0	6,454.2	6,894.2	6,718.6	-2.5	6,709.0	-0.1	6,558.0	..
URUGUAY	25.0	23.0	22.0	18.0	-18.2	18.0	0.0	...	..
YUGOSLAVIA	784.0	786.0	772.0	876.0	+13.5	...	..	...	..

[1] January-June
[2] EC-12 as of 1986

TABLE 15 - Pigmeat Consumption ('000 metric tons, carcass weight and kg./capita)

Country		1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84	Forecast 1986	1987
ARGENTINA	- Total	253.0	230.0	207.0	210.0	+1.4	200.0	-4.8	...	..
	- per capita	9.0	8.0	7.0	7.0	0.0	6.5	-7.1	...	..
AUSTRALIA	- Total	230.5	227.1	244.0	254.0[2]	+4.1	258.0[2]	+1.6	264.0	271.0
	- per capita	15.4	14.9	15.9	16.4	+3.1	16.4	0.0	16.6	17.0
BRAZIL	- Total	603.2	517.7	557.0	471.2	-15.4	220.2[2]	..	500.0	500.0
	- per capita	...	...	...	...	...	...	..	...	..
CANADA	- Total	733.5	686.6	712.9	701.2	-1.6	712.2	+1.6	690.5	..
	- per capita	30.1	27.8	28.6	27.9	-2.4	..	..	...	..
EEC	- Total	10,052.0	10,096.0	10,228.0	10,285.0	+0.6	10,464.0	+1.7	12,275[3]	..
	- per capita	37.1	37.2	37.7	37.8	+0.3	38.4	+1.6	38.2	
FINLAND	- Total	140.8	142.9	149.9	151.2	+0.9	153.0	+1.2	153.0	..
	- per capita	29.3	29.6	30.9	31.0	+0.3	31.2	+0.6	31.2	..
HUNGARY	- Total	436.6	436.8	461.3	457.1	-0.9	...	..	...	..
	- per capita	40.8	40.8	43.2	42.8	-0.9	...	..	...	..
JAPAN	- Total	1,661.0	1,629.0	1,665.0	1,708.0	+2.6	823[1]	..	...	..
	- per capita	14.1	13.7	14.0	14.2	+1.4	6.9	..	...	..
NEW ZEALAND	- Total	32.7	36.5	39.6	43.1	+8.8	45.0	+4.4	45.0	..
	- per capita	10.4	11.5	12.3	13.3	+8.1	13.7	+3.0	13.5	..
NORWAY	- Total	79.9	74.1	79.5	79.5	0.0	80.2	+0.9	83.0	..
	- per capita	19.5	18.0	19.3	19.2	-0.5	19.3	+0.5	...	..
POLAND	- Total	1,140.0	1,154.0	1,125.0	1,037.0	-7.8	...	..	...	..
	- per capita	31.7	31.9	30.7	28.1	-3.8	...	..	...	..
SOUTH AFRICA	- Total	92.0	102.0	115.6	114.0	-1.4	114.5	+0.4	119.0	123.0
	- per capita	3.0	3.3	3.6	3.5	-2.8	3.4	-2.9	3.4	3.4
SWEDEN	- Total	282.4	272.8	272.5	257.7	-5.4	264.0	+2.4	266.0	..
	- per capita	33.9	32.8	32.7	30.9	-5.5	31.7	+2.6	31.9	..
SWITZERLAND	- Total	281.9	290.7	295.1	280.4	-6.8	288.0	+2.7	284.0	..
	- per capita	43.4	44.3	45.0	42.6	-5.8	...	..	...	..
UNITED STATES	- Total	7,344.6	6,655.0	7,075.6	7,091.0	+0.2	7,153.0	+0.9	6,984.0	..
	- per capita	32.2	28.8	30.4	30.2	-0.7	29.0	-4.0	30.3	..
URUGUAY	- Total	25.0	23.0	22.0	18.0	-13.6	18.0	0.0	...	..
	- per capita	8.7	7.9	7.4	6.4	-13.5	6.1	-4.7	...	..
YUGOSLAVIA	- Total	740.0	694.0	693.0[2]	757.0[2]	+9.2	...	..	...	..
	- per capita	34.1	31.7	31.6[2]	34.1[2]	+7.9	...	..	...	..

[1] January-June
[2] Preliminary
[3] EC-12 as of 1986

TABLE 16 - Pigmeat Imports ('000 metric tons, carcass weight equivalent)

Country	1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84	Forecast 1986
AUSTRALIA	-	-	-	0.8	-	0.8[3]	0.0	..
CANADA	19.0	13.0	19.4	12.9	-33.5	9.0[1]	..	..
EEC	180.0	161.0	67.0	148.0	+120.9	155.0	+4.7	..
JAPAN	265.0	201.0	236.0	278.0	+17.8	225.0[4]	-19.1	265.0[4]
NEW ZEALAND	1.5[2]	2.0[2]	1.3	0.8[1]	..[1]	..	..	..
NORWAY	1.6	2.6	2.4	2.4	0.0	1.0[1]	..	..
POLAND	87.3	71.0	27.1	105.0	+287.5	44.0	-58.1	20.0[4]
SOUTH AFRICA	-	-	-	1.0	-	-	-	..
SWEDEN	5.1	4.9	9.1	5.9	-35.2	4.5[1]	..	..
SWITZERLAND	8.1	4.5	4.7	5.7	+21.3	..	..	..
UNITED STATES	245.0	278.0	318.4	433.0	+36.0	500.0	+15.5	476.0
YUGOSLAVIA	...	...	...	2.9[1]	...	..	..	..

[1]January-June
[2]Year ended 30 June
[3]Preliminary
[4]Source: USDA Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1985

TABLE 17 - Pigmeat Exports ('000 Metric Tons, Carcass Weight Equivalent)

Country	1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84	Forecast 1986
ARGENTINA	0.5	0.3	-	-	(-41.9)	-	-	..
AUSTRALIA	2.3	2.2	3.0	3.2	+6.7	4.0[3]	+25.0	..
BRAZIL	1.2	2.6	2.3	6.2[1]	+169.6	2.4[1]	..	..
CANADA	127.0	162.0	156.0	173.0	+10.9	185.0[5]	+6.9[5]	200[5]
EEC	350.0	248.0	280.0	394.0	+40.7	400.0	+1.5	450[4]
FINLAND	40.5	37.5	25.3	19.9	-21.4	9.0[1]	..	..
HUNGARY	126.0	155.3	161.5	206.4	+27.8	190.0[5]	-7.8[5]	190[5]
NEW ZEALAND	0.3[2]	0.3[2]	0.2	0.0[1]	..[1]	..	..	..
NORWAY	2.5	12.7	3.1	6.0	+93.5	2.6[1]	..	..
POLAND	74.6	63.6	79.1	88.0	+11.3	93.0	+5.7	93
SOUTH AFRICA	1.0	2.0	2.2	1.0	-50.0	1.5	+50.0	..
SWEDEN	40.9	56.5	52.7	76.2	+44.6	61.0[5]	-19.7[5]	45[5]
SWITZERLAND	1.3	1.4	2.0	1.4	-30.0	..	..	..
UNITED STATES	139.0	97.0	99.3	74.0	-25.5	54.0	-27.0	50
YUGOSLAVIA	...	...	...	4.9	...	1.5[1]	..	..

[1] January-June

[2] Year ended 30 June

[3] Preliminary

[4] Estimated by the Meat and Livestock Commission, United Kingdom

[5] Source: USDA Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1985.

TABLE 18 - Poultry Meat Production ('000 Metric Tons, Ready-to-Cook Basis)

Country	1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84	Forecast 1986	Forecast 1987
ARGENTINA	269.0	245.0	286.0	299.0	+4.5	305.0	+2.0	...	..
AUSTRALIA	288.3	293.1	294.9	309.4	+4.9	354.0	+14.4	340.0	350.
BRAZIL[1]	946.5	1,068.4	1,075.8	1,049.7[2]	-2.4	551.5[1]	..	1,000.0	1,000.0
CANADA	526.7	527.5	527.0	557.6	+5.8	580.0	+4.0	602.0	..
EEC	4,197.0	4,397.0	4,312.0	4,295.0	-0.4	4,349.0	+1.3	5,340.0[3]	..
FINLAND	17.0	16.5	18.3	19.7	+7.1	20.0	+1.5	20.0	..
HUNGARY	352.9	404.5	388.9	390.9	+0.5	390.0	-0.2	...	..
JAPAN	1,125.0	1,184.0	1,239.0	1,313.0	+6.0	675.0[2]	..	...	..
NEW ZEALAND	35.2	36.2	32.5	41.3	+27.1	43.0	+4.1	45.0	..
NORWAY	12.8	10.1	10.8	11.0	+1.9	5.7[2]	..	...	..
POLAND	431.0	183.0	185.0	249.0	+34.6	...	..	...	..
SOUTH AFRICA	383.4	429.8	457.1	480.3	+5.1	514.0	+7.0	544.0	570.0
SWEDEN	46.9	45.9	47.0	45.9	-2.3	46.5	+1.3	46.0	..
SWITZERLAND	24.3	24.4	24.6	25.6	-8.6	28.0	+9.4	...	..
TUNISIA	30.0	51.9	37.5	43.0	+14.7	45.5	+5.8	49.5	..
UNITED STATES	6,948.8	7,000.6	7,151.6	7,435.4	+4.0	7,749.0	+4.2	8,101.0	..
URUGUAY	26.0	12.0	15.0	15.0	0.0	16.0	+6.7	20.0	..
YUGOSLAVIA	286.0	283.0	287.0	313.0	+9.1	...	..	...	..

[1] Federally inspected production (about 70 per cent of total production)

[2] January-June

[3] EC-12 as of 1986

TABLE 19 - Poultry Meat Consumption ('000 Metric Tons, Ready-to-Cook Basis and kg./Capita)

Country		1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84	Forecast 1986	Forecast 1987
ARGENTINA	- Total	280.0	247.0	290.0	299.0	+3.1	305.0	+2.0	...	..
	- per capita	9.9	8.6	9.9	10.0	+1.0	10.0	0.0		
AUSTRALIA	- Total	282.9	290.4	292.0	309.0[2]	+5.8	345.0[2]	+11.7	340.0	345.0
	- per capita	18.5	19.1	19.1	19.9[2]	+4.2	22.0[2]	+10.6	21.4	21.7
BRAZIL	- Total	652.6	766.6	786.5	769.4[1]	-2.2	372.9[1]	..	720.0	720.0
	- per capita	...	...	...	...	...	...	..	...	..
CANADA	- Total	550.3	560.7	571.1	608.0	+6.5	638.4	+5.0	660.7	..
	- per capita	22.5	22.7	22.9	24.2	+6.7	25.5	+5.4	...	..
EEC	- Total	3,703.0	3,928.0	3,897.0	4,004.0	+2.7	4,114.0	+2.7	5,110.0[3]	..
	- per capita	14.0	14.5	14.4	14.7	+2.1	15.1	+2.7	15.9	..
FINLAND	- Total	16.9	16.5	18.3	19.6	+7.1	20.0	+2.0	20.0	..
	- per capita	3.5	3.4	3.8	4.0	+6.4	4.1	+2.5	4.1	..
HUNGARY	- Total	202.7	216.0	211.6	222.5	+5.2	...	..	...	..
	- per capita	18.7	20.2	19.8	20.9	+5.6	...	..	...	..
JAPAN	- Total	1,223.0	1,286.0	1,340.0	1,417.0	+6.7	719.0	..	...	..
	- per capita	10.4	10.8	11.1	11.8	+6.3	6.0	..	...	..
NEW ZEALAND	- Total	35.2	36.2	32.5	41.3	+27.1	43.0	+4.1	45.0	..
	- per capita	11.1	11.4	10.1	12.7	+25.7	13.1	+3.1	13.5	..
NORWAY	- Total	10.0	11.1	11.1	11.4	+2.7	11.4	0.0	...	..
	- per capita	2.4	2.7	2.7	2.8	+3.7	2.7	-3.6	...	..
POLAND	- Total	419.0	200.0	192.0	250.0	+30.2	...	..	...	..
	- per capita	11.6	5.5	5.3	6.8	+28.3	...	..	...	..
SOUTH AFRICA	- Total	364.8	417.2	442.0	473.3	+7.1	502.0	+6.1	532.0	564.0
	- per capita	12.0	13.4	13.8	14.4	+4.3	14.9	+3.5	15.3	15.8
SWEDEN	- Total	46.8	44.5	44.5	44.3	-0.4	44.0	-0.7	44.0	..
	- per capita	5.6	5.3	5.4	5.4	0.0	5.3	-1.9	5.4	..
SWITZERLAND	- Total	51.7	51.6	53.4	57.2	+7.1	26.5[1]	..	...	..
	- per capita	8.0	7.9	8.2	8.7	+6.1	...	..	...	..
TUNISIA	- Total	39.8	41.5	37.5	43.0	+14.7	46.7	+8.6	51.0	..
	- per capita	6.1	6.2	5.5	6.1	+10.9	6.6	+8.2	7.2	..
UNITED STATES	- Total	6,454.0	6,761.0	6,955.0	7,233.0	+4.0	7,526.0	+4.1	7,879.0	..
	- per capita	28.3	29.0	29.5	30.4	+3.1	31.8	+4.6	32.5	..
URUGUAY	- Total	20.0	19.0	13.0	12.0	-7.7	13.0	+8.3	14.0	..
	- per capita	6.7	6.6	4.5	3.9	-13.3	4.2	+7.7	4.5	..
YUGOSLAVIA	- Total	280.0	265.0	280.0	302.0[2]	+7.9	...	..	...	..
	- per capita	12.9	12.1	12.8	13.6[2]	+6.3	...	..	...	..

[1] January-June

[2] Preliminary

[3] EC-12 as of 1986

TABLE 20 - Poultry Meat Imports ('000 metric tons, carcass weight equivalent)

Country	1981	1982	1983	1984	% change 1984/83	Estimates 1985	% change 1985/84	Forecast 1986
ARGENTINA ('000 head)	11.0	2.0	1.5	1.5	0.0	0.3[1]	..	..
CANADA	27.0	31.0	36.0	26.0	-27.8	8.0[1]	..	..
EEC	69.0	68.0	66.0	76.0	+15.2	75.0	-1.3	..
JAPAN	98.0	103.0	101.0	104.0	+3.0	115.0[2]	+10.6[2]	115[2]
NORWAY	0.5	0.4	0.4	0.5	+25.0	0.2[1]	..	..
POLAND	9.1	17.5	20.5	15.9	-22.4	7.6	-52.2	..
SOUTH AFRICA	3.0	1.5	1.6	1.0	-35.0	-	(-96.1)	..
SWEDEN	0.4	0.3	0.4	0.4	0.0	0.3[1]	..	..
SWITZERLAND	28.0	27.2	29.4	31.8	+8.2	..	..	..
TUNISIA	-	-	0.5	-	-100.0	-	-	..
UNITED STATES	-	-	1.6	1.9	+18.8	-	..	..
YUGOSLAVIA	...	...	...	0.5[1]	...	-	..	..

[1] January-June
[2] Source: USDA Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1985

TABLE 21 - Poultry Meat Exports ('000 metric tons, carcass weight equivalent)

Country	1981	1982	1983	1984	% change 1984/83	Estimates 1985	% change 1985/84	Forecast 1986
ARGENTINA	-	-	0.4	-	-100.0	..	..	..
AUSTRALIA	5.4	2.7	1.3	1.1	-15.4	1.0[3]	-9.1	..
BRAZIL	293.9	301.8	289.3	281.0[5]	-2.9[5]	271.0[5]	-3.8[5]	251[5]
CANADA	4.0	3.0	2.0	2.0	0.0	1.0[1]	..	..
EEC	463.0	443.0	448.0	374.0	-16.5	330.0	-11.8	..
HUNGARY	156.6	178.2	185.7	162.5	-12.5	160.0[5]	-1.5[5]	170[5]
JAPAN	3.0	3.0	2.0	2.0	0.0	2.0[1]	..	..
NEW ZEALAND	0.4[2]	0.4[2]	0.4	0.2[1]	...	..	..	..
POLAND	14.5	13.9	13.2	14.2	+7.6	14.5	+2.1	..
SOUTH AFRICA	21.6	14.1	16.6	8.0	+51.8	0.7[4]	..	..
SWEDEN	1.7	2.4	1.7	4.7	+176.5	..	..	..
SWITZERLAND	0.5	0.2	0.5	-	-100.0	..	..	..
UNITED STATES	375.0	261.0	225.0	207.0[5]	-7.1	203.0[5]	-1.9[5]	195.0[5]
URUGUAY	6.0	3.0	2.0	4.0	+100.0	..	..	..
YUGOSLAVIA	...	...	...	26.5[1]	...	21.3[1]	..	..

[1] January-June
[2] Year ended 30 June
[3] Preliminary
[4] January-May
[5] Source: USDA Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1985

TABLE 22 - Sheepmeat Production ('000 metric tons, carcass weight equivalent)

Country	1981	1982	1983	1984	% change 1984/83	Estimates 1985	% change 1985/84	Forecast	
								1986	1987
ARGENTINA	114.0	111.0	110.0	102.0	-7.3	95.0	-6.9	...	..
AUSTRALIA	519.0	559.0	465.0	450.2	-3.4	506.0	+12.4	529.0	542.0
BRAZIL	6.8	7.1	5.0	5.2[1]	+4.0	1.6[1]	..	5.0	5.0
CANADA	6.6	7.9	8.7	9.2	+5.7	8.8	-4.3	8.4	..
EEC	728.0	733.0	741.0	735.0	-0.8	755.0	+2.7	927.0[2]	..
FINLAND	1.0	1.0	1.2	1.3	+15.5	1.0	-23.1	1.0	..
HUNGARY	22.2	22.5	24.8	27.2	+9.7	...	..	...	..
NEW ZEALAND	623.3	679.3	712.0	686.3	-3.6	680.0	-0.9	650.0	..
NORWAY	18.7	20.9	20.8	22.3	+7.2	22.8	+2.2	23.2	..
POLAND	17.0	17.0	17.0	20.0	+17.6	...	..	...	..
SOUTH AFRICA	179.0	206.0	216.4	221.4	+2.3	230.0	+3.9	235.0	242.0
SWEDEN	4.9	5.3	5.3	4.9	-7.5	5.0	+2.0	5.0	..
SWITZERLAND	2.9	2.8	2.7	2.9	+7.4	2.8	-3.4	2.7	..
TUNISIA	29.0	30.0	28.4	30.3	+6.7	31.7	+4.6	33.1	..
UNITED STATES	152.9	165.6	170.1	171.9	+1.1	155.6	-9.5	147.4	..
URUGUAY	58.0	53.0	51.0	43.0	-15.7	46.0	+7.0	48.0	..
YUGOSLAVIA	58.0	59.0	62.0	59.0	-4.8	...	..	...	..

[1] January-June
[2] EC-12 as of 1986

TABLE 23 - Sheepmeat Consumption ('000 metric tons, carcass weight equivalent and kg./capita)

Country		1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84	Forecast 1986	Forecast 1987
ARGENTINA	- Total	90.0	85.0	88.0	85.0	- 3.4	83.0	- 2.4	...	..
	- per capita	3.0	3.0	3.0	3.0	0.0	2.7	-10.0	...	..
AUSTRALIA	- Total	289.0	313.0	311.0	321.0	+ 3.2	345.0	+ 7.5	341.0	341.0
	- per capita	19.5	21.3	20.2	20.7	+ 2.5	21.9	+ 5.8	21.2	20.8
BRAZIL	- Total	5.6	4.6	4.4	4.6[1]	+ 4.5	1.2[1]	..	4.4	4.4
	- per capita	...	...	...	...	...	...	..	...	..
CANADA	- Total	17.3	18.2	19.9	21.9	+10.1	21.5	- 1.8	20.5	..
	- per capita	0.7	0.7	0.8	0.9	+12.5	0.8	-11.1	...	..
EEC	- Total	933.0	975.0	971.0	963.0	- 0.8	980.0	+ 1.8	1,150.0[3]	..
	- per capita	3.4	3.6	3.6	3.5	- 2.8	3.6	+ 2.9	3.6	..
FINLAND	- Total	1.0	1.0	1.3	1.4	+14.3	1.6	+14.3	1.9	..
	- per capita	0.2	0.2	0.3	0.3	0.0	0.3	0.0	0.4	..
HUNGARY	- Total	5.5	3.9	3.7	4.0	+ 8.1	...	..	...	..
	- per capita	0.4	0.4	0.3	0.4	+33.3	...	..	...	..
JAPAN	- Total	176.0	170.0	165.0	150.0	- 9.1	77.0[1]	..	...	..
	- per capita	1.5	1.4	1.4	1.2	-14.3	0.6[1]	..	...	..
NEW ZEALAND	- Total	95.0	99.9	108.8	90.4	-16.9	95.0	+ 5.1	100.0	..
	- per capita	30.1	31.4	34.0	27.8	-18.2	28.9	+ 4.0	30.0	...
NORWAY	- Total	20.2	24.4	23.8	23.6	- 0.8	23.7	+ 0.4	19.5	..
	- per capita	4.9	5.4	5.8	5.7	- 1.7	5.7	0.0	...	..
POLAND	- Total	17.0	17.0	17.0	21.0	+23.5	...	..	...	..
	- per capita	0.5	0.5	0.5	0.5	0.0	...	..	...	..
SOUTH AFRICA	- Total	182.0	208.9	220.7	226.7	+ 2.7	236.0	+ 4.1	243.0	251.0
	- per capita	6.0	6.7	6.9	6.9	0.0	7.0	+ 1.4	7.0	7.0
SWEDEN	- Total	5.8	5.3	6.1	5.8	- 4.9	6.0	+ 3.4	6.0	..
	- per capita	0.7	0.6	0.7	0.7	0.0	0.7	0.0	0.7	..
SWITZERLAND	- Total	8.2	8.7	8.4	9.2	+ 9.5	8.5	- 4.5	8.3	..
	- per capita	1.3	1.3	1.3	1.4	+ 7.7	...	...	...	..
TUNISIA	- Total	30.0	31.0	33.4	34.8	+ 4.2	32.7	- 6.0	34.1	..
	- per capita	4.6	4.6	4.9	5.0	+ 2.0	4.6	- 8.0	4.6	..
UNITED STATES	- Total	164.8	174.2	177.3	181.9	+ 2.6	166.0	- 8.7	155.1	..
	- per capita	0.7	0.8	0.8	0.7	-12.5	0.7	0.0	0.6	..
URUGUAY	- Total	39.0	38.0	40.0	37.0	- 7.5	38.0	+ 2.7	39.0	..
	- per capita	13.5	13.0	13.4	12.4	- 7.5	12.7	+ 2.4	13.0	..
YUGOSLAVIA	- Total	52.0	50.0	55.0	51.0[2]	- 7.3	...	...	...	..
	- per capita	2.4	2.3	2.5	2.3[2]	- 8.0	...	...	...	..

[1] January-June

[2] Preliminary

[3] EC-12 as of 1986

TABLE 24 - Sheepmeat Imports ('000 Metric Tons, Carcass Weight Equivalent)

Country	1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84	Forecast 1986
AUSTRALIA	-	-	1.4	4.9	+250.0	2.0[1]	..	..
CANADA	10.0	11.0	14.0	9.8	- 30.0	7.0[1]	..	..
EEC	226.0	281.0	252.0	248.0	- 1.6	250.0	+0.8	..
FINLAND	-	-	0.1	0.1	(+ 3.0)	...	..	..
JAPAN	176.0	170.0	165.0	150.0	- 9.1	150.0[2]	0.0[2]	160[2]
NORWAY	1.8	0.9	0.3	0.4	+ 33.3	0.2[1]	..	..
POLAND	-	-	-	0.6	-	16.1	+2,583.3	...
SOUTH AFRICA	3.0	2.9	4.3	5.3	+ 23.3	5.8	+9.4	...
SWEDEN	0.8	0.7	0.8	0.7	- 12.5	0.7[1]	..	..
SWITZERLAND	5.0	5.2	4.8	5.4	+ 12.5	...	...	..
TUNISIA	1.1	0.9	1.7	1.4	+ 27.3	0.5	-64.3	..
UNITED STATES	14.0	8.0	9.0	9.0	0.0	..	...	..

[1] January-June

[2] Source: USDA Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1985.

TABLE 25 - Sheepmeat Exports ('000 Metric Tons, Carcass Weight Equivalent)

Country	1981	1982	1983	1984	% Change 1984/83	Estimates 1985	% Change 1985/84	Forecast 1986
ARGENTINA	24.0	25.0	23.0	17.0	-26.1	7.0[3]	..	..
AUSTRALIA	218.3	234.7	173.6	126.1	-27.4	163.5	+29.7	..
BRAZIL	1.2	2.5	0.6	0.6	0.0	0.4[3]	..	..
EEC	6.0	4.0	5.0	5.0	0.0	5.0	0.0	..
HUNGARY	19.1	21.0	22.5	22.5	0.0	8.8[3]	..	..
NEW ZEALAND[2]	468.7	461.6	522.3	488.6[1]	...	479.5[1]	- 1.9[1]	515.0[1]
POLAND	5.2	4.8	6.2	6.3	+ 1.6	8.0	+27.0	...
UNITED STATES	1.0	1.0	1.0	1.0	0.0	1.0	0.0	1.0
URUGUAY	18.0	15.0	11.0	6.0	-45.5	4.0[3]	..	..
YUGOSLAVIA	...	...	...	6.4	...	5.6[3]	..	..

[1] Year ended 30 September
[2] Year ended 30 June
[3] January - June