

**GENERAL AGREEMENT  
ON TARIFFS AND TRADE**

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**Arrangement Regarding Bovine Meat**

**MEAT CONSUMPTION TRENDS**

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

**ARGENTINA**

**Question 1**

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

Bovine meat continues to be the major source of animal proteins in Argentina. Nevertheless, in recent years important changes have taken place in the relative share of bovine meat and other meat proteins, mainly poultry, whose consumption has risen significantly. In 1990, per capita consumption of bovine meat was 71.3 kg. whereas in 1993 the average was 66.9 kg. per capita, representing a decrease of 6.17 per cent over the period. There was an increase in consumption of poultry (chickens only), which rose from 10.4 kg. per capita in 1990 to 20 kg. in 1993, an increase of 92.3 per cent. This led to changes in the percentages of total consumption of meat, bovine meat decreasing from 80.6 per cent in 1990 to 70.1 per cent, while the consumption of poultry rose from 11.8 per cent of overall consumption in 1990 to 20.9 per cent in 1993. The remaining percentage has not changed to any significant extent and is made up of pig meat and sheep meat in that order. These changes are essentially due to two factors. The first is the noticeable decrease in the price of poultry (due to greater local production and increased imports) and secondly to the changes in consumer habits based on the belief that poultry is less prejudicial to health than bovine meat.

**Question 2**

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

As mentioned in the reply to the previous question, although there has been a decrease in the consumption of bovine meat, it nevertheless continues to be the consumers' preference in Argentina. This is due in large measure to traditional habits and the tastes of consumers who regularly utilize various cuts in many different ways.

**Question 3**

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

For the reasons given above, the answer to this question is in the affirmative; the consumption of meat in Argentina follows the general trend of a partial shift away from red meat to white meat, in particular, poultry meat (chicken).

#### Question 4

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

The factors which have had the most effect on the changes in recent years in the relative share of various types of meat in total consumption are the following: the trend in bovine meat prices compared to the price of poultry (see comparative table), the supposed benefits - already mentioned - which poultry meat may have for health in comparison with bovine meat and, lastly, an intelligent marketing strategy by the industry which started to supply the product in many different forms (not only whole birds but also in cuts to be prepared or cuts ready for cooking) and through different sales outlets, especially supermarkets. This has been decisive because for many years other meat products did not respond to this trend and when they did, poultry meat had already imposed itself.

#### Question 5

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

There is no direct relationship between exports and domestic consumption. In recent years, the fall in exports has coincided with the decrease in domestic consumption. The import of bovine meat does not play any significant role in Argentina because 90 per cent of its production is for domestic consumption.

#### Question 6

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

In Argentina, there are no policies directed at affecting beef consumption and/or retail prices.

#### Question 7

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

The State promotes various production techniques for organic meat as a future marketing opportunity. For this purpose, production and marketing has been regulated, taking into account the potential demand by certain consumption sectors with high purchasing power both on domestic and international markets. Externally, Argentina has started to carry out campaigns to promote high-quality cuts in markets where it has not had any commercial presence for this product up till now, for example,

South-East Asia. This has been accompanied by an exhaustive survey of the market and the food habits in this region on the part of the State and the private sector. At the domestic level, a programme is being implemented to increase domestic consumption of lamb from Patagonia. This programme is aimed at organizing the sector for sheep meat, which is marketed with a seal of origin thus giving it a higher value and rehabilitating a production area that is free of foot and mouth disease. This is seen as the initial phase before marketing abroad.

#### **Question 8**

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

As in the majority of countries, supermarkets are gradually taking over a greater share of retail sales. Currently, it is estimated that 40 per cent of meat sales go through this channel and over half of this percentage is concentrated in the seven main supermarket chains. The mode of operation in supermarkets, unlike butcheries, is to prepare cuts in containers covered with polyethylene, which guarantees consumers better organoleptic conditions. In addition, some supermarket chains are starting to sell meat under their own marks or sell marks that are renowned for their quality, which carries weight with consumers. To these two reasons must be added changes in the way consumers shop; they prefer the commodity of supermarkets to butcheries, not only because of the packaging but also because they can make all their purchases in one place, in addition to the variety, preparation, uniform quality and hygiene of the meat.

#### **Question 9**

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

Hotels and restaurants are an expanding sector, but they do not have any identifiable effect on meat consumption. It is particularly in international hotels and high-class restaurants that efforts are made to use sheep meat of Patagonian origin so that sectors with high purchasing power know and demand this product. This strategy is also followed by the industry which markets specific marks of bovine meat (for example, Cabaña las Lilas).

#### **Question 10**

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

Argentina has transmitted additional information to the Secretariat.