

GENERAL AGREEMENT ON TARIFFS AND TRADE

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International Dairy Arrangement

COMMITTEE OF THE PROTOCOL REGARDING CERTAIN CHEESES

Sixteenth Session

Draft Report

Introduction

1. The Committee of the Protocol Regarding Certain Cheeses held its sixteenth session on 15 December 1983.

Adoption of the agenda

2. The Committee adopted the following agenda:
1. Adoption of report on the fifteenth session
 2. Information required by the Committee:
 - (a) Replies to Questionnaire 3
 - (b) Summary tables
 - (c) Other information
 3. Review of the market situation for products covered by the Protocol
 4. Adoption of report to the Council
 5. Other business

Adoption of report on the fifteenth session

3. The Committee adopted the report on its fifteenth session. The report will be distributed as document DPC/C/22.

Information required by the Committee

(a) Replies to Questionnaire 3

4. The Committee reviewed the replies to Questionnaire 3 and requested members which had not yet communicated information for the third quarter of 1983 to do so without delay. In addition, it was pointed out that replies to Questionnaire 3 relating to the fourth quarter of 1983 should reach the secretariat not later than 15 March 1984.

(b) Summary tables

5. The Committee had before it a document containing revised summary tables (DPC/C/W/1/Rev.15) prepared in conformity with Rule 28 of the Rules of Procedure and reproducing the information furnished in Tables A and B of Questionnaire 3 regarding cheeses. The Committee took note of document DPC/C/W/1/Rev.15.

(c) Other information

6. No other information was requested.

Review of the market situation for products covered by the Protocol

7. The representative of the United States informed the Committee that a new dairy legislation had been passed. As enacted the bill included a 50 cent per 100 lb. drop in the support price from the former support price of \$13.10 per 100 lb. for manufacturing milk with 3.67 per cent milk fat. The bill contained a mandatory 50 cent per 100 lb. deduction from the

proceeds of sale of all milk marketed to help a fifteen-month paid diversion programme. Producers signing up for this programme would contract to reduce annual marketings by a specified amount, 5 to 30 per cent from a certain base, and would receive \$10 per 100 lb. for reduced marketings below their base period production. The fifteen-month diversion programme would begin 1 January 1984. If on 31 March 1985 the milk surplus was estimated to exceed 6 billion pounds, milk equivalent, for the next twelve months, the Secretary of Agriculture could lower the support price by another 50 cents per 100 lb. Three months later, the Secretary could lower the support price still another 50 cents per 100 lb. if the next twelve months of surplus production was projected to exceed 5 billion pounds milk equivalent. Also, the bill included a mandatory deduction of 15 cents per 100 lb. for a dairy product promotion, research, and nutrition education programme. As to the impact of the new legislation, it was anticipated that milk production in 1984 would decrease by about 5 per cent. It was expected that stocks of dairy products would be down as well. The donation programmes for the needy would continue and would be expanded. It was also anticipated that retail sales would increase. With regard to the present situation he said that in 1983 commercial disappearance of all milk and dairy products was likely to be down about 1 per cent but total consumption would be higher due to large donations of dairy products under the needy-persons programme. Production in 1983 was expected to be up probably by about 1.8 to 2 per cent. Uncommitted Commodity Credit Corporation (CCC) stocks of dairy products on 9 December 1983, had been the following: cheese: 854.1 million lb. (approximately 387,400 tons); butter: 362.4 million lb. (approximately 164,400 tons); skimmed milk powder: 1,358.8 million lb. (approximately 616,200 tons). With regard to the new legislation he noted that the regulations were now being developed. In reply to a question he said that further information on the new legislation would be communicated to the secretariat.

8. The representative of Switzerland said that milk deliveries to dairies had increased by 2.4 per cent in the 1982/83 dairy season in relation to

1981/82 when producers had not fully taken up their quotas. Milk deliveries had increased appreciably in October and November 1983, but were expected to drop back in the first quarter of 1984. That situation would probably affect cheese production which was forecast to show an increase by 8 per cent in the fourth quarter of 1983 and to decline somewhat in the first quarter of 1984. Imports were estimated to have risen by about 2 per cent in the fourth quarter of 1983 and a further slight increase seemed likely in the first quarter of 1984. Exports of cheese were believed to have remained stable in the last quarter of 1983 but could increase slightly in the first quarter of 1984. Cheese consumption was expected to show an increase by 1 to 2 per cent in the fourth quarter of 1983, a trend that could continue into the first quarter of 1984. Stocks of the principal hard cheese varieties had increased appreciably, to reach some 21,000 tons at 1 November 1983 as against 18,000 tons one year earlier. In the first quarter of 1984 they were expected to continue at a higher level than in the preceding year. Prices had remained stable in the last quarter of 1983 but could increase slightly in the first quarter of 1984.

9. The representative of Uruguay said that in the third quarter of 1983 cheese exports had doubled in relation to the corresponding period of 1982 to around 1,000 tons, the principal destinations being Latin American countries. F.o.b. export prices had been appreciably lower than one year earlier.

10. The representative of Sweden recalled that in 1973 consumer subsidies had been introduced and had since then been applied for a number of foodstuffs, i.e. liquid milk, cheese, pigmeat, beef and veal, in order to keep consumer prices down. This had meant that parts of the price increases agreed upon during the semi-annual agricultural price negotiations had not taken place and that public means had been used in order to compensate producers. He informed the Committee that as an integral part of a package of measures to limit budgetary expenditure, all the consumer subsidies with exception for subsidies on liquid milk had been abandoned as from 1 December 1983. As a result, the target prices (middle

prices) for these products had been adjusted correspondingly as well as the import levies which were aimed at securing the middle price level. For "hard cheese" under the heading 04.04 ex 900, this had meant an increase of the import levy by SEK 2.60 per kg. as from 1 December 1983 and by SEK 1.70 per kg. for processed cheese under the heading 04.04.200. He indicated that production of cheese had increased slightly in 1983. Consumption had continued to increase and imports had decreased slightly in 1983.

11. The representative of Norway said that on the basis of preliminary figures in October 1983, milk production was expected to reach 1,850 million litres in 1983 as compared to 1,880 million litres in 1982. It was also expected that this downward trend would continue. With regard to cheese, he said that production had decreased in 1983 while domestic consumption had somewhat increased.

12. The representative of Finland said that as from September 1984 a two-price system for milk production would be introduced. The details concerning this measure would be discussed in the beginning of 1984 and his delegation hoped to furnish further information in the next meeting. He informed the Committee that the ratio of butter and margarine prices which had been kept constant in recent years would be changed in favour of butter. It was expected that milk deliveries to dairies would amount to 2,950 million litres in 1983. With regard to cheese it was estimated that production would amount to 68,000 tons in 1983 as compared to 74,000 tons in 1982. Exports might decline to some 29,000 tons in 1983 as compared to 34,000 tons in 1982.

13. The representative of South Africa made general comments regarding the dairy industry in his country. The severe drought that South Africa had experienced over the last couple of years had continued unabated until October 1983. In November, however, good rains had fallen over large parts of the country although certain areas had not received any relief. These conditions affected dairy production to an important extent as farmers switched to this branch of farming to improve their cash flow. The result

had been an upsurge in dairy production which had led to the present high level of stocks. With specific regard to cheese, the magnitude of the increased milk production during the July to September quarter (25 per cent higher than the previous quarter) had been totally unexpected and a substantial quantity had been diverted to cheese manufacturing. As a result, the production of cheese had increased by more than 1,800 tons. Consumption of cheese had been lower during the July to September period due to advance buying in June. An increase was anticipated in the current quarter, mainly due to 4,000 tons of Cheddar being made available for promotional purposes. Consumption was estimated at 9,850 tons. Stock levels at the end of December were expected to be approximately 10,600 tons.

14. The representative of the EEC said that milk output and deliveries to dairies were expected to show an increase by 3.8 per cent and 3.9 per cent respectively in 1983 in relation to 1982. On the basis of certain projections, milk output and deliveries to dairies could be up by 1.7 per cent and 2 per cent respectively in 1984 in relation to 1983. Cheese production was estimated to have increased by 1.1 per cent in 1983. In the three first quarters of that year, cheese exports had been above their level in the corresponding period of 1982. The market situation in the Community was slightly better for cheese than for other dairy products. With respect to Cheddar cheese, however, production and stocks were fairly substantial and the market was somewhat burdened notwithstanding some improvement in certain member States. With respect to export prices for Cheddar cheese, some recent sales at fairly low prices had had a negative impact on price trends and even if the relevant quantities were small they could contribute to depress the market. Export prices for Cheddar cheese were currently fluctuating between US\$1,300 and US\$1,500 per ton f.o.b. according to quality. Exports of other cheese were developing satisfactorily despite the fact that refunds granted for certain destinations had been eliminated.

15. The representative of New Zealand said that milk production since the start of the 1983/84 dairy season on 1 June was running slightly ahead of that in the same period last season. Overall, climatic conditions had been slightly better than average for grass growth and good rain falls had been recorded in areas which had been relatively dry last season. It was expected that production would be broadly the same as last season although some modification to the mix of products had been necessitated by market conditions. Continued severe price competition in markets for cheese, especially in Japan had encouraged the production of alternative production at the expense of cheese. With regard to the international market situation he noted that the downward trend in prices apparent during the Northern summer appeared to have stabilized, as supplies from minor trading countries in Eastern Europe and from Europe outside the EEC had been cleared from markets. Surplus stocks in the United States and the EEC continued to have a dampening effect on the trade. With regard to the market situation for cheese, he said that price competition in cheese markets continued to be strong although there had been a short period of relative stability at the beginning of the fourth quarter. However, an increase in EEC restitutions for Edam and Gouda cheeses had resulted in further price declines in these varieties which might be difficult to avoid for other hard and semi-hard varieties, especially Cheddar. Depending on variety, good quality cheese was selling at between US\$1,250 and US\$1,350 per metric ton, f.o.b.

16. The representative of the EEC referred to the statement made by the New Zealand representative regarding an increase in refunds granted on certain cheese varieties and noted that in June 1983 the refunds for certain varieties had not been adjusted in order to take account of the increase in intervention prices. The decision to increase certain refunds had been postponed because the Community had been reproached over Cheddar sales to Japan at low prices and, furthermore, because of a slight disagreement between the Community and Australia regarding EEC exports of certain cheeses. The Community had subsequently reached an arrangement with Australia and had reduced the refunds granted on certain cheese

exports to that country. It had then adjusted the refund granted on certain cheese varieties. That recent increase had merely been delayed since June 1983 for the reasons which he had just mentioned.

17. The representative of Japan made a general statement on domestic production and imports. With regard to domestic production, Japanese dairy farms had been seeking to improve productivity in recent years under strict management circumstances of the production restraint programme and the governmental policy of restraining the support price level. The enlargement of the size of dairy farms had progressed remarkably. The number of dairy farms had been steadily decreasing. Compared to 147,000 dairy farms in 1976, the number decreased to 93,000 in 1983, i.e. a 37 per cent decrease during those seven years. As a result, during this period, the average herd number per farm had increased from twelve heads to twenty-three heads. With regard to imports, the main categories were natural cheese and skimmed milk powder for animal feed. The self-sufficiency ratio of milk and milk products, for human consumption, was estimated at around 90 per cent. If milk products for animal feed were included, the self-sufficiency ratio was estimated at around 75 per cent, although there were yearly variations. With regard to cheese, he said that demand in Japan was tending to increase and that a considerable part of supply was dependent on imports. In 1982, the share of imports was as high as 82 per cent of the total supply. In 1981, imports of cheese had decreased due to a steep rise of international prices, but in 1982, as a result of the reduction of stocks in the previous year, imports had increased by 4.1 per cent to reach 74,000 tons. Imports of natural cheese in the first three quarters of 1983 had decreased by 7.4 per cent, reflecting the recent market situation.

18. The representative of Australia said that milk production in the July-September 1983 period at 1,509 million litres had been 9.2 per cent up on the corresponding months in the 1982/83 season. The increase was mainly attributed to the excellent seasonal conditions which had prevailed, enabling continued improvements in farm productivity. Indications were that increases in milk yields attained during the 1982/83 season would be

maintained and possibly improved upon in 1983/84. Consequently, the Australian Dairy Corporation now estimated that the 1983/84 milk flow would be around 5,800 million litres, 5 per cent up on the 1982/83 level. With regard to cheese, he said that production of leviabile cheese in the July-September 1983 period, at 28,753 tons, had been marginally down on year earlier levels, and estimated 1983/84 production of 115,000 tons was below the 1982/83 level. Production of non-leviabile cheese in the July-September 1983 period had reached 7,145 tons and estimated 1983/84 production was 48,000 tons. In response to increased promotional activity, some growth was anticipated in domestic consumption of cheese while given higher than optimal closing stocks, export availability was expected to be around 60,000 tons for the remainder of the season. The international cheese market had continued to experience increasing price pressure in the period under review. In the Japanese market price quotations from European suppliers had continued to erode the level of price that traditional suppliers such as Australia and New Zealand had previously achieved. Recent quotations were reported to have been in the range of US\$1,200-US\$1,350 per ton f.o.b. In other markets competition had been fierce and prices of the increasingly desperate sellers were reported to be approaching the minimum price applicable under the Protocol.

19. The representative of Hungary said that in the first three quarters of 1983, production and exports of cheese had remained stable while domestic consumption had risen by about 5 per cent in relation to the corresponding period of 1982.

20. The representative of the United States said that his delegation wished to furnish some information on recent price quotes for Cheddar cheese. Poland had offered first-grade young Cheddar cheese at US\$800 per ton f.o.b. East European ports and aged Cheddar cheese at prices between US\$950 and US\$1,000 per ton f.o.b. Rotterdam.

21. The observer of Canada said that milk production in the period August-October 1983 had decreased by 6 per cent as compared to the corresponding period of 1982. Milk production for manufacturing had declined by 10.2 per cent during that three-month period as a result of measures taken to reduce industrial milk production.

22. The observer for Spain made a general statement on the situation in his country's dairy sector, and informed the Committee that in January 1984 his delegation would be forwarding to the secretariat a communication on the subject.

23. The representative of Uruguay asked the observer for Spain if the safeguard measures taken by Spain to limit imports of cheese were still in force.

24. In reply, the observer for Spain said that consultations had recently been held on the matter with the EEC and some other exporters. The reasons which had justified the action were still in existence. The measures, which had been taken on a temporary basis, were still in force.

25. The Committee underlined that the world market situation for Cheddar cheese remained serious. It noted that the utmost vigilance was necessary and any indications regarding price developments on the international market were useful for it. Accordingly, it invited delegations to communicate all available information.

Other business

Communication from the New Zealand Permanent Mission (DPC/C/W/13)

26. The Committee had before it a communication from the New Zealand Permanent Mission confirming the information furnished in the previous meeting of the Committee that sales under the derogation under Article 7:2 of the Protocol were likely to be closer to 2,000 than to 1,000 tons in

1983 (DPC/C/W/13). The Committee had also before it a further report on sales effected under the provisions of Article 7:2 of the Protocol. This report had been distributed subsequently as document DPC/C/W/15.

27. The representative of New Zealand referred to the report on sales made under derogation and indicated that sales made between June and November had amounted to 1,823.6 tons. He recalled that his delegation had indicated that New Zealand would sell up to 2,000 tons of cheese under derogation in 1983. He indicated that because of continuing difficulties in the cheese market there would probably be a necessity to sell some further cheese under the provisions of Article 7:2 of the Protocol in 1984.

Communication from the Australian Permanent Mission (DPC/C/W/14)

28. The Committee had before it a communication from the Australian Permanent Mission giving advance notice of Australia's intention to invoke the provisions of Article 7:2 of the Protocol (DPC/C/W/14).

29. The representative of Australia referred to document DPC/C/W/14 and emphasized that Australia's intention to sell cheese below the minimum price had been notified to the secretariat in advance as required by Article 7:2 of the Protocol. The quantity of 41.8 tons had been sold to Japan at US\$850 per ton c.i.f. (compared with the normal price of US\$1,570 per ton c.i.f.). This quantity had been sold in November 1983 and had been part of a larger shipment already in Japan. He confirmed that the sale had been made necessary because the cheese in question had been found, on arrival in Japan, to be affected by heavy deposits of calcium lactate (or tyrosine) throughout the natural cheese mass. This had made the cheese unsuitable for processing purposes. The Australian Dairy Corporation had explored all avenues for sale of the defective cheese, but found that the only opportunity for disposal had been to the bakery trade for manufacturing purposes at a substantial discount to the normal price. He noted that the small quantity and the defective character of the cheese involved meant that the sale had no appreciable effect on normal cheese prices.

Statement by the representative of Poland

30. The representative of Poland advised the Committee that in conformity with the International Dairy Arrangement, in August 1983 Poland had sold to an EEC company 500 tons of Cheddar cheese for processing only, at the price of US\$800 per ton f.o.t., because Poland had not been in a position to process the cheese in its own processing facilities. In October last, Poland had sold, for the same reasons, a further 500 tons of Cheddar cheese for processing only at the price of US\$618.23 per ton f.o.t. in Poland. Those two transactions were the only ones effected at prices below the minimum level fixed under the International Dairy Arrangement, and were justified by the quality of the cheese involved. The relevant communication from Poland, dated 14 December 1983, had been circulated in document DPC/C/W/16.

31. The representative of the EEC expressed concern over the recent increase in cheese transactions under a derogation in terms of Article 7:2 of the Protocol. Having regard to the tightness of the world cheese market, such sales could adversely affect the cheese trade. He stressed that participants were required to give prior notification to the secretariat of their intention to invoke the provisions of that paragraph.

32. The representative of the United States reiterated his statement concerning recent price quotes by Poland for Cheddar cheese (see paragraph 20).

33. The Committee underlined that any intention to invoke the provisions of Article 7:2 of the Protocol was required to be notified in advance. All participants were urged strictly to comply with the procedure laid down in that paragraph. It was agreed that in the event of any further breach of those provisions before the next session, the Committee could directly approach the participants concerned and urge them to carry out their obligations in full. The Committee underlined the importance, for preserving the credibility of the Arrangement, of strict observance of all its provisions.

Adoption of report to the Council

34. Pursuant to Article VII:2(a) of the Arrangement and in accordance with Rule 22 of the Rules of Procedure, the Committee adopted its report to the council. That report, on the Committee's sixteenth session, will be distributed as DPC/C/24.

Dates of next sessions

35. At the ninth session of the Council it was proposed that, as for the 1983 sessions, a preliminary calendar should be established for 1984 and provisional dates adopted at the December 1983 sessions of the Committees. The following dates have been agreed for 1984:

26 to 28 March 1984,

- the Council to meet on 29 and (if necessary) 30 March 1984 -

20 to 22 June 1984,

24 to 26 September 1984,

- the Council to meet on 27 and (if necessary) 28 September 1984 -
17 to 19 December 1984.

It was agreed that, to the extent their work permitted, the Committees could hold their sessions in two days instead of three. At the March sessions for which the dates 26 to 28 March 1984 have been scheduled, the session of the Committee of the Protocol Regarding Certain Milk Powders will be followed by the session of the Committee of the Protocol Regarding Certain Cheeses and then the session of the Committee of the Protocol Regarding Milk Fat. The opening date of the session of the Committee of the Protocol Regarding Certain Milk Powders (26 or 27 March 1984) will be confirmed by the secretariat after consultation with delegations.

ANNEX/ANNEXE/ANEXO

LIST OF REPRESENTATIVES - LISTE DES REPRESENTANTS -
LISTA DE REPRESENTANTES

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