THE INTERNATIONAL MARKETS FOR MEAT

1986/87

GENERAL AGREEMENT ON TARIFFS AND TRADE

GENEVA, JANUARY 1987

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Introduction

The present document, the seventh annual report concerning the world markets for meat, has been prepared by the GATT secretariat, on its own responsibility, mainly on the basis of information and documentation supplied by participants in the Arrangement Regarding Bovine Meat. It covers the situation in the market for bovine animals and meat principally for the year 1986, containing estimates for the second half of the year and for the year 1986 as well as forecasts for 1987. 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.

The Arrangement 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 for the benefit of both consumer and producer, importer and exporter. To this end, the Arrangement provides for a comprehensive information and co-operation mechanism applicable to bovine animals and the bovine meat sector.

To date there are twenty-seven signatories of the Arrangement - Argentina, Australia, Austria, Belize, Brazil, Bulgaria, Canada, Colombia, Egypt, European Community, Finland, Guatemala, Hungary, Japan, New Zealand, Nigeria, 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.

Apart from the the sources mentioned above, information from the following publications, inter alia, has been used: Economic Outlook, OECD, December 1986 and OECD meat statistics; Dairy, Livestock and Poultry, World Livestock and Poultry Situation, United States Department of Agriculture, various issues for 1986; In Brief, Australian Meat and Livestock Corporation, various issues for 1986; European Weekly Market Survey, Meat and Livestock Commission, various issues for 1986; Weekly Information Bulletin, Junta Nacional de Carnes, various issues for 1986; The New Zealand Meat Producer, New Zealand Meat Producers' Board, various issues for 1986; The Reuter Meat Newsletter, various issues July-December 1986 and Informe Ganadero, various issues, Buenos Aires, 1986.

Notes: "Tons" in the document means "metric tons, carcass weight", unless otherwise stated. Figures for 1986 are preliminary. Figures may not add up due to rounding. Export and import figures in Table 1 and in the table after each country include fresh, chilled and frozen beef and veal, as well as cooked and canned and otherwise prepared bovine meat, unless otherwise stated, but exclude carcass weight equivalent of live cattle.

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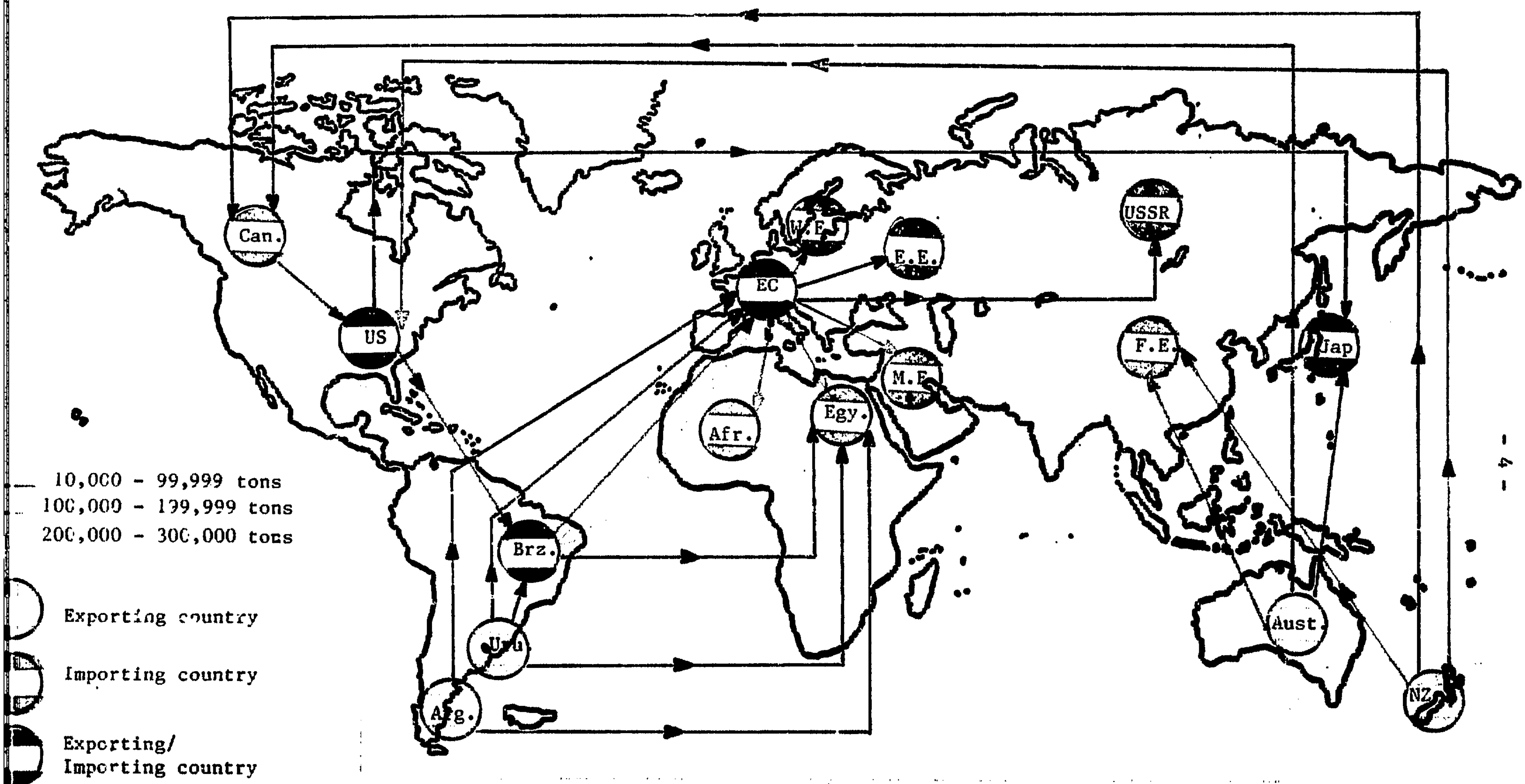
MAJOR BOVINE MEAT TRADE FLOWS IN 1986[1/]
(Fresh, Chilled and Frozen)



1/ Product weight

Source: GATT

E.E. - Eastern Europe; F.E. - Far East; M.E. - Middle East; W.E. - Western Europe

I. INTERNATIONAL SITUATION AND OUTLOOK IN THE BOVINE MEAT SECTOR

(a) Situation

(i) Economic

1. Although growth in the OECD area was slower than earlier anticipated, the most recent figures for economic growth in 1986* indicate a rise of 2.5 per cent, a slightly higher rate than previously forecast. The upward revision is due mainly to the effects of the fall in petroleum prices, reductions in interest rates and a better pattern of exchange rates. For the developing countries, a similar or slightly higher growth rate was expected. It is expected that the above-mentioned factors will also have had a positive effect on inflation rates, estimated at 2.75 per cent in 1986. For the twelve months to September 1986 inflation rates in the OECD area averaged 2.5 per cent. This was due to the fall in oil prices and to anti-inflation policies implemented in most countries. Employment increased in most OECD countries in 1986 at the rate of 1.25 per cent and in the second half of the year, employment in the European countries is estimated to have increased by some 1.3 million. The unemployment level was unchanged at 8.25 per cent of the workforce although the jobless decreased in some countries. As concerns trade, the volume of world trade during the first half of 1986 grew at the same rate as in 1985, according to GATT experts.** For the whole of 1986, they expected that world merchandise trade would expand by some 3.5 per cent, slightly more than in 1985, after an increase in the first half of the year estimated at 3 per cent in volume terms and 8 per cent in value terms, reflecting the depreciation of dollar values over the last twenty months.

(ii) Grains***

2. In recent years, the bovine meat economy has been increasingly affected by the over-production situation in the grains sector. According to the FAO, total production of coarse grains amounted to 818,000,000 tons in 1985, a record level. Estimates in December put the production in 1986 at an even higher level: 865,000,000 tons. Consumption reached 773,000,000 tons in 1985 and was expected to increase to 800,000,000 tons in 1986. Some 81,000,000 tons were expected to be traded, down by 6 per cent on year earlier and the lowest volume traded since 1976/77, while stocks were anticipated to expand by 24.6 per cent to 243,000,000 tons. This downward revision of 1986/87 coarse grains' trade is due to the recent announcement of the plentiful cereal crop in the Soviet Union. The abundance of cereals, including feedgrains, on the world market in the last few years has increased competition and put heavy pressure on grains prices. Since the 1983/84 season, United States export prices of maize (corn) have thus declined by 50 per cent while those of sorghum have fallen by 51.9 per cent. In view of available large supplies, weak import demand and policy measures in major producing and exporting countries, resulting in reduced prices for wheat and maize, it does not seem likely that there will be any appreciable rise in world grain prices in the near future. The low maize prices have greatly improved the price ratios of hog/maize and steer/corn.**** These have risen recently to record highs of 45.3 for hogs and 42.6 for cattle, for instance, in the United States thus rendering livestock-rearing more profitable.

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*OECD Economic Outlook, December 1986

**GATT International Trade 1985/86

***Source: FAO, Food Outlook, December 1986; and International Wheat Council, Market Report, 25 September 1986.

****The number of maize bushels that can be purchased for every 100 lbs. of livestock.

(iii) Bovine meat

3. As in 1985, the bovine meat sector was affected in 1986 by large availabilities of all types of meat mainly as a result of abundant supplies of low-priced feedgrains (see paragraph above). However, international prices for bovine meat strengthened in the course of the year as a consequence of rising import demand in a number of major countries.

4. As concerns world production of bovine meat, no significant changes seem to have occurred in 1986 as to total volume. The reasons for this lie in a certain number of unexpected factors which balance themselves out more or less, such as production rises in the United States, in Argentina and in Uruguay, instead of the anticipated decline, and a lower production decline than earlier expected in the European Community. Bovine meat output also expanded in Australia and in the USSR, remained relatively unchanged in Canada and fell in New Zealand and particularly in Brazil where the fall, reflecting the difficult local situation, was quite substantial. In the United States the production increase was largely due to the Dairy Termination Programme. Commercial production rose by some 3.5 per cent in the first half of the year; however, lower slaughter weights in the second half brought total production growth down, and for the year as a whole, the increase was less important. In Argentina, the expansion of output was related to higher slaughter weights (while slaughter levels declined only marginally) and to a continuing rise in domestic demand. The slower rate of decline of beef and veal output in the European Community was probably linked to higher average carcass weights (in particular in the Federal Republic of Germany) related to the low price of feedgrains and presumably also to the shift, of some producers, from the raising of dairy cattle to that of steers. In Australia, the growth in overall annual production resulted mainly from the sharp rises registered at the beginning of the year, as a consequence of poor seasonal conditions, while in New Zealand production is expected to have shown an upturn after the delays in slaughter at the beginning of the year. The Brazilian farmers' reluctancy to sell cattle to the slaughterhouses at the price fixed by the Government affected beef and veal production. Thus Brazilian output in 1986 was 13.2 per cent lower than in 1985. The beef and veal production increase in the Soviet Union is estimated at some 6 per cent, while Mexican output seems to have declined by about 6.5 per cent.

5. Generally speaking, consumption of bovine meat over the last few years was negatively affected by the difficult economic situation in a number of major producing (and consuming) countries, by high levels of unemployment, competition from lower-priced meats (in particular poultry meat) and, increasingly, by health considerations. In 1985, high levels of bovine meat supplies and generally depressed prices seem to have stimulated beef and veal consumption somewhat. Although the international demand for beef and veal strengthened in 1986, the evolution of consumption is not yet clear. The situation varied strongly from country to country. Per capita consumption fell both in the United States and in Canada. In the European Community, improved economic conditions allowed a continuation of the recovery of consumption in total terms, although at a slower rate than in the last two years.* In Australia, an increase in total intake of beef and

*As a result of the entry of Spain and Portugal into the European Community, average per capita consumption of beef and veal declined. However, in the EC(10) it increased.

veal took place, while that of per capita remained at the previous year's level. In New Zealand both total and per capita consumption remained relatively unchanged. Total and per capita bovine meat consumption in Brazil expanded as a result of the price freeze and higher incomes. Per capita consumption increased by almost 9 per cent in Argentina, while in Uruguay it did not change from year earlier. Available data suggest an increase in consumption in the Soviet Union resulting both from higher output levels (which were apparently not seriously affected by the Chernobyl accident) and large beef purchases from the EC at the end of 1985 and beginning of 1986. It is generally accepted that bovine meat consumption in the Middle East, although still rising, may be doing so at a slower rate than in recent years, partly as a consequence of the expansion of domestic output of poultry meat, and partly due to the departure of foreign workers.

6. As mentioned above, prices of beef and veal began to recover in 1986 in spite of the dampening effect of large availabilities of all types of meats. Prices increased not only on the international market, but also in a number of national markets. Reasons for the price rises vary from country to country: in some countries they were largely due to exchange rate phenomena, in others to lower levels of output and in still others to a strong increase in demand resulting from higher disposable incomes. However, the recovery of prices on the international markets for beef and veal, although evident in a number of major countries and for certain types of meat (such as the price increase for imported meat in North America and for certain cuts of Hilton beef in the European Community), seems to be more hesitant or even unnoticeable in other markets, such as Egypt. Also, this tendency for price recovery takes place from very depressed price levels and is still very recent. In order to have a full positive impact on the bovine meat industry, the price recovery would have to continue.

7. In 1986 there was an increase in both the volume and value of traded beef and veal. Moreover, the international bovine meat trade has rarely been so much affected by the situation in one single country, that is, in Brazil. A net exporter of bovine meat in 1985 and the third largest one, Brazil became in 1986 a net importer, the second largest after the United States. This situation helped to relieve the pressure on international prices exerted by the large surpluses existing, since a considerable part of those was sold to Brazil. The European Community was the major beneficiary with almost 300,000 tons of intervention beef sold to Brazil, but the EC was not the only one. The United States agreed to a 90,000 tons sale to that country, virtually all the meat it needed to export under the provisions related to the Dairy Termination Programme, and Uruguay's exports rose sharply with sales to Brazil of more than 80,000 tons. A number of other countries, such as Argentina, Poland and Sweden, also sold bovine meat to Brazil. Another positive impact of this country's purchases includes increases registered by some countries (such as Argentina and Uruguay) in their export returns, which seems to be due, at least to some extent, to the levelling-off of competition on certain markets and the consequent price increase. Finally, countries like Australia and New Zealand may have benefited from lower exports by other countries, such as by Brazil, to certain Asian markets. The Brazilian difficulties also had some impact on the trade of other meats because they led the country to purchase abroad not only bovine meat, but also increasing quantities of both pigmeat and sheepmeat. Furthermore, the decline in Brazilian poultry exports is likely to have benefited other exporters in a progressively shrinking market.

TABLE 1

SELECTED COUNTRIES' TRADE IN BEEF AND VEAL

A. EXPORTS

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Argentina	260	240	-7.7	260	+8.3
Australia	707	745	+5.4	685	-8.1
Brazil	438	306	-30.1	150	-51.0
Canada	117	107	-8.4	95	-11.5
EC	733	1,000[1]	+36.4	680[1]	-32.0
New Zealand[2]	356	329	-7.6	415	+26.7
United States	151	229	+51.7	206	-10.0
Uruguay	134	201	+50.0	164	-18.4
Others	280	270	-3.6	300	+11.1
Total	3,176	3,427	+7.9	2,955	-13.8

B. IMPORTS

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Brazil	48	500[3]	+941.7	350[3]	-30.0
Canada	116	118	+1.8	120	+1.7
EC	395	390[1]	-1.3	390[1]	0.0
Japan	226	235[3]	+4.0	244[3]	+3.8
United States	947	974	+2.9	984	+1.0
USSR[5]	320	300	-6.3	280	-6.7
Africa[3]	387	390	+0.8	400	+2.6
Other Asia[5]	80	77	-3.8	80	+3.9
Middle East[5]	139	121	-12.9	122	+0.8
Eastern Europe[3],[6]	35	52	+48.6	57	+9.6
Other Europe	21	23	+9.5	21	-8.7
Total	2,714	3,180	+17.2	3,048	-4.2

[1] EC (12) [2] Year ended 30 September [3] Secretariat estimate

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

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

(b) Outlook

(i) Economic

8. Economic conditions in the OECD are expected to continue to improve in 1987 when growth rates are forecast to be maintained at the same level as in 1986 or maybe even slightly higher. Growth rates are projected to be less dissimilar in the various OECD countries in 1987 than they were a few years back, ranging from an anticipated 3 per cent in the United States to 2.75 per cent in Japan, 2.5 per cent in the European Community and zero in New Zealand. Inflation rates will continue to decrease and are expected to average 3 per cent in 1987. Employment growth is expected to continue at the same rate as in 1986 but slowing down somewhat during the second half of the year. Unemployment levels are not expected to decline more than marginally in 1987 and will, for instance, stabilize in Europe at around 11.5 per cent of the workforce, which would mean 19.5 million people during the second half of 1987. The growth in real domestic demand that took place in 1986 is forecast to continue in 1987 (although at a somewhat slower rate), a factor of importance to demand for beef.

(ii) Bovine meat

9. The majority of factors (including domestic policies and oil prices) which affected the international bovine meat sector in 1986 are expected to continue to exert an extensive influence throughout 1987. This means, inter alia, that large supplies of low-priced feedgrains will continue to boost production of competing meats, poultry in particular. However, it also means that the positive factors which were present in 1986 will continue to have an impact on the sector in 1987, more than likely outweighing the negative factors.

10. World production of beef and veal may well fall in 1987 (by about 1.5 per cent, to some 42,000,000 tons) as a result of drops in major producing countries and regions such as the United States, the European Community, Canada, Australia, Argentina and Uruguay. Although it is expected that world consumption will decline, this would essentially be due to reductions forecast in the United States' and Canadian consumption (-5 and -3 per cent respectively) which basically would reflect similar reductions in these countries' output. Most other consuming countries or regions are projecting higher consumption levels, and consequently world consumption of bovine meat should decline less than production. It is probable that the Soviet Union's intake will rise further, while in the Middle East countries the expansion of consumption should continue to slow down. Simultaneously, consumption of both pigmeat and poultry meat should continue to grow although, according to available data, the trend of rising poultry meat intake will slow down for the second year in a row. Sheepmeat consumption, after having probably already dropped during 1986, will continue to fall in 1987.

11. Taking into account the expected further strengthening of the world economy and the above-mentioned evolution of both production and consumption, conditions seem to be set for a somewhat brighter scenario for the international bovine meat trade in 1987 than in the last several years. In these conditions, and in spite of the still high supplies of all types of meat, it would seem that the price recovery initiated in 1986 in a number of markets will continue in the current year. However, although Brazil is

expected to remain a net importer in 1987 (and maybe still a major ' ; with the consequent positive impact on the international situation, its imports will decline significantly. Also, other factors such as domestic policy measures not only in the bovine meat sector but also in others (dairy and grains sectors especially) may again have significant effects on the international beef and veal market. This will be the case, for instance, of the European Community commitment of last December to reduce milk production by almost 10 per cent over the next two years (which, even if it will not totally offset the anticipated beef and veal production decline, will add more meat to still considerable stocks) and the significant reductions in the intervention prices for bovine meat. Uncertain oil prices and rising self-sufficiency in poultry meat will continue to exert a major influence on the Middle East's import demand for beef and veal while the competition in certain Asian countries may continue to level off somewhat as a result of sharply reduced exports by Brazil. In conclusion, although 1987 will probably be a more favourable year for the international bovine meat sector compared to the last few years, there is still an important number of uncertainties. Furthermore, as already mentioned, the price recovery is still very recent and far from having reached all markets. Thus there can be no room for complacency.

TABLE II[1/]

Fresh, Chilled and Frozen Beef and Veal Exports of Seven Major Beef Exporting Countries (1984-1986), and the Proportion of Each Country's Exports Going to Each Destination

('000 tons)

EXPORTER / DESTINATION	AUSTRALIA[2/] 1984	AUSTRALIA 1985	AUSTRALIA 1986[12/]	EC[3/] 1984	EC 1985	EC 1986[14/]	ARGENTINA[4/] 1984	ARGENTINA 1985	ARGENTINA 1986[10/]	NEW ZEALAND[5/] 1983/4	NEW ZEALAND 1984/5	NEW ZEALAND 1985/6[13/]	URUGUAY[6/] 1984	URUGUAY 1985	URUGUAY 1986[11/]	BRAZIL[7/] 1984	BRAZIL 1985	BRAZIL 1986[10/]	UNITED STATES[8/] 1984	UNITED STATES 1985	UNITED STATES 1986[12/]
WESTERN EUROPE: of which	3.1 (0.8)	5.8 (1.3)	5.8 (1.5)	45.7 (8.1)	53.9 (9.6)	23.1 (4.6)	30.6 (26.6)	39.4 (53.0)	17.5 (52.6)	0.5 (0.3)	0.4 (0.2)	0.2 (0.2)	20.0 (21.7)	24.4 (26.4)	14.1 (20.8)	55.8 (48.3)	50.5 (36.0)	22.8 (35.8)	-	-	-
EC	2.8 (0.7)	5.4 (1.2)	4.9 (1.3)	-	-	-	24.9 (29.8)	33.0 (44.4)	15.9 (47.7)	0.3 (0.2)	0.2 (0.1)	0.1 (0.1)	17.7 (19.2)	20.6 (22.3)	14.0 (20.6)	48.1 (41.6)	42.9 (30.6)	21.1 (33.1)	-	-	-
OTHER	0.3 (0.1)	0.4 (0.1)	0.9 (0.2)	45.7 (8.1)	53.9 (9.6)	23.1 (4.6)	5.7 (6.9)	6.4 (8.6)	1.6 (4.8)	0.2 (0.1)	0.2 (0.1)	0.1 (0.1)	2.3 (2.5)	3.8 (4.1)	0.1 (0.1)	7.7 (6.7)	7.6 (5.4)	1.7 (2.7)	-	-	-
EASTERN EUROPE: of which	-	-	-	131.6 (23.2)	96.1 (17.0)	175.8 (35.0)	32.6 (39.0)	-	-	-	-	-	7.9 (8.6)	-	-	-	-	-	-	-	-
USSR	-	-	-	75.0 (13.2)	84.0 (14.9)	132.3 (26.3)	32.6 (39.0)	-	-	-	-	-	7.9 (8.6)	-	-	-	-	-	-	-	-
OTHER	-	-	-	56.6 (10.0)	12.1 (2.1)	43.5 (8.7)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
NORTH AMERICA: of which	236.4 (61.2)	294.5 (67.3)	260.6 (69.4)	28.5 (5.0)	14.9 (2.6)	3.3 (0.7)	-	-	-	150.4 (83.8)	196.1 (86.0)	115.6 (87.3)	-	-	-	-	-	-	8.9 (9.0)	6.7 (6.7)	4.5 (4.3)
USA	225.5 (58.4)	273.7 (62.5)	231.8 (61.8)	5.0 (0.9)	4.9 (0.9)	2.7 (0.5)	-	-	-	134.2 (74.8)	172.4 (75.5)	104.4 (78.9)	-	-	-	-	-	-	-	-	-
CANADA	10.9 (2.8)	20.8 (4.8)	28.8 (7.7)	23.5 (4.2)	10.0 (1.8)	0.6 (0.1)	-	-	-	16.2 (9.0)	23.7 (10.4)	11.2 (8.5)	-	-	-	-	-	-	8.9 (9.0)	6.7 (6.7)	4.5 (4.3)
SOUTH AMERICA: of which	-	-	-	-	-	2.9 (0.6)	5.9 (7.1)	9.4 (12.6)	5.1 (15.3)	-	-	-	28.4 (30.8)	49.2 (53.2)	40.9 (60.3)	0.5 (0.4)	0.7 (0.5)	-	-	-	[illegible] (14.4)
BRAZIL	-	-	-	-	-	2.9 (0.6)	-	0.6 (0.8)	1.3 (3.9)	-	-	-	23.9 (26.0)	48.6 (52.6)	38.1 (56.2)	-	-	-	-	-	15.1 (14.4)
CENTRAL AMERICA AND CARIBBEAN	6.7 (1.7)	7.9 (1.8)	3.2 (0.9)	4.9 (0.9)	5.4 (1.0)	-	-	-	-	2.5 (1.4)	4.1 (1.8)	2.0 (1.5)	-	-	0.1 (0.1)	-	-	-	-	-	-
AFRICA: of which	-	-	0.1 (0.0)	97.8 (17.3)	112.2 (19.9)	35.5 (7.1)	1.1 (1.3)	9.8 (13.2)	2.8 (8.4)	0.1 (0.1)	-	-	4.1 (4.5)	1.5 (1.6)	3.4 (5.0)	-	-	-	-	-	-
ALGERIA	-	-	-	20.5 (3.6)	15.5 (2.7)	15.6 (3.1)	-	-	0.1 (0.3)	-	-	-	-	-	-	-	-	-	-	-	-
LIBYA	-	-	-	9.7 (1.7)	9.5 (1.7)	5.3 (1.1)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
ANGOLA	-	-	-	0.2 (0.0)	0.7 (0.1)	-	1.0 (1.2)	9.1 (12.2)	2.1 (6.3)	-	-	-	3.1 (3.4)	-	3.3 (4.9)	-	-	-	-	-	-
WEST AFRICA[9/]	-	-	-	44.0 (7.8)	45.2 (8.0)	-	-	0.3 (0.4)	0.1 (0.3)	-	-	-	0.9 (1.0)	1.5 (1.6)	0.1 (0.1)	-	-	-	-	-	-
OTHER	-	-	0.1 (0.0)	23.4 (4.1)	42.3 (7.3)	14.6 (2.9)	0.1 (0.1)	0.4 (0.5)	0.5 (1.5)	0.1 (0.1)	-	-	0.1 (0.1)	-	-	-	-	-	-	-	-

EXPORTER / DESTINATION	AUSTRALIA 2/ 1984	AUSTRALIA 2/ 1985	AUSTRALIA 2/ 1986 12/	EC 3/ 1984	EC 3/ 1985	EC 3/ 1986 14/	ARGENTINA 4/ 1984	ARGENTINA 4/ 1985	ARGENTINA 4/ 1986 10/	NEW ZEALAND 5/ 1983/4	NEW ZEALAND 5/ 1984/5	NEW ZEALAND 5/ 1985/6 13/	URUGUAY 6/ 1984	URUGUAY 6/ 1985	URUGUAY 6/ 1986 11/	BRAZIL 7/ 1984	BRAZIL 7/ 1985	BRAZIL 7/ 1986 10/	UNITED STATES 8/ 1984	UNITED STATES 8/ 1985	UNITED STATES 8/ 1986 12/
MIDDLE EAST:	3.1 (0.8)	2.9 (0.7)	2.2 (0.6)	239.6 (42.3)	276.5 (49.1)	174.2 (34.7)	11.9 (14.3)	14.6 (19.6)	6.4 (19.2)	2.1 (1.2)	1.5 (0.7)	0.9 (0.7)	29.1 (31.6)	12.6 (13.6)	6.0 (8.8)	40.1 (34.7)	69.2 (49.4)	32.3 (50.7)	1.6 (1.6)	1.6 (1.6)	1.2 (1.1)
of which																					
EGYPT	-	-	-	123.9 (21.9)	156.1 (27.7)	104.7 (20.8)	-	-	-	-	-	-	12.0 (13.0)	-	-	10.9 (9.4)	3.0 (2.1)	-	-	-	-
ISRAEL	-	-	-	5.4 (1.0)	2.3 (0.4)	-	8.2 (9.8)	11.8 (15.9)	5.7 (17.1)	-	-	-	9.6 (10.4)	7.6 (8.2)	4.8 (7.1)	9.1 (7.9)	9.4 (6.7)	1.6 (2.5)	-	-	-
SAUDI ARABIA	1.8 (0.5)	1.0 (0.2)	0.8 (0.2)	25.8 (4.6)	31.1 (5.5)	30.4 (6.0)	3.3 (4.0)	2.4 (3.2)	0.6 (1.8)	0.7 (0.4)	0.4 (0.2)	0.3 (0.2)	3.3 (3.6)	2.5 (2.7)	1.2 (1.8)	6.9 (6.0)	5.5 (3.9)	2.2 (3.5)	1.6 (1.6)	1.6 (1.6)	1.2 (1.1)
IRAN	-	-	-	37.7 (6.7)	28.2 (5.0)	23.8 (4.7)	-	-	-	-	-	-	4.0 (4.3)	2.1 (2.3)	-	-	-	-	-	-	-
IRAQ	-	-	-	29.5 (5.2)	35.6 (6.3)	15.3 (3.0)	-	-	-	-	-	-	-	-	-	13.2 (11.4)	51.2 (36.5)	28.5 (44.7)	-	-	-
GULF (excluding Iran and Saudi Arabia)	1.3 (0.3)	1.4 (0.3)	1.3 (0.3)	15.3 (2.7)	12.9 (2.3)	-	0.4 (0.5)	0.3 (0.4)	0.1 (0.3)	1.3 (3.7)	1.0 (0.4)	0.6 (0.5)	0.2 (0.2)	-	-	-	-	-	-	-	-
OTHER	-	0.5 (0.1)	0.1 (-)	2.0 (0.4)	10.3 (1.8)	-	-	0.1 (0.1)	-	0.1 (0.1)	0.1 (0.0)	-	-	0.4 (0.4)	-	-	0.1 (0.1)	-	-	-	-
FAR EAST:	132.2 (34.2)	122.4 (28.0)	96.9 (25.8)	1.6 (0.3)	2.0 (0.4)	-	0.3 (0.4)	1.2 (1.6)	1.5 (4.5)	17.5 (9.8)	16.1 (7.1)	9.0 (6.8)	2.6 (2.8)	3.9 (4.2)	3.0 (4.4)	4.7 (4.1)	8.2 (5.8)	3.5 (5.5)	78.6 (79.2)	82.3 (82.3)	77.0 (73.7)
of which																					
JAPAN	93.4 (24.2)	94.1 (21.5)	72.6 (19.3)	1.1 (0.2)	1.3 (0.2)	-	-	-	-	7.9 (4.4)	7.5 (3.3)	4.0 (3.0)	-	-	-	-	-		77.4 (78.0)	81.3 (81.3)	77.0 (73.7)
HONG KONG	1.7 (0.4)	2.1 (0.5)	2.5 (0.7)	0.4 (0.1)	0.4 (0.1)	-	-	-	0.4 (1.2)	2.4 (1.3)	2.2 (1.0)	1.6 (1.2)	1.6 (1.7)	2.5 (2.7)	1.6 (2.4)	4.7 (4.1)	8.0 (5.7)	3.4 (5.3)	-	-	-
REPUBLIC OF KOREA	10.7 (2.8)	0.1 (0.0)	0.1 (0.0)	-	-	-	-	-	-	2.6 (1.5)	1.4 (0.6)	-	-	-	-	-	-		1.2 (1.2)	1.0 (1.0)	-
TAIWAN	19.2 (5.0)	21.3 (4.8)	17.4 (4.6)	-	-	-	-	-	-	1.5 (0.8)	1.9 (0.8)	1.4 (1.1)	-	-	-	-	-		-	-	-
SINGAPORE	3.1 (0.8)	1.1 (0.3)	1.0 (0.3)	-	0.1 (0.0)	-	0.3 (0.4)	1.2 (1.6)	1.1 (3.3)	-	-		0.9 (1.0)	1.3 (1.4)	1.4 (2.1)	-	0.1 (0.1)	0.1 (0.2)	-	-	-
OTHER	4.1 (1.1)	3.7 (0.8)	3.3 (0.9)	0.1 (0.0)	0.2 (0.0)	-	-	-	-	3.1 (1.7)	3.1 (1.4)	2.0 (1.5)	0.1 (0.1)	0.1 (0.1)	-	-	-	-	-	-	-
OCEANIA	3.8 (1.0)	3.7 (0.8)	6.2 (1.7)	1.9 (0.3)	1.8 (0.3)	-	-	-	-	6.3 (3.5)	9.9 (4.3)	4.7 (3.5)	-	-	-	-	-	-	-	-	-
OTHER	0.7 (0.2)	0.4 (0.1)	0.3 (0.1)	14.6 (2.6)	0.9 (0.2)	87.0 (17.5)	1.1 (1.3)	-	-	-	-	-	-	0.8 (0.9)	0.3 (0.4)	14.4 (12.5)	11.7 (8.3)	5.1 (8.0)	10.1 (10.2)	9.4 (9.4)	6.7 (6.4)
TOTAL	386.0 (100.0)	437.6 (100.0)	375.3 (100.0)	566.2 (100.0)	563.7 (100.0)	502.6 (100.0)	83.5 (100.0)	74.4 (100.0)	33.3 (100.0)	179.4 (100.0)	228.1 (100.0)	132.4 (100.0)	92.1 (100.0)	92.4 (100.0)	67.8 (100.0)	115.5 (100.0)	140.2 (100.0)	63.7 (100.0)	99.2 (100.0)	100.0 (100.0)	104.5 (100.0)

1/ The upper number is the volume 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: Various issues of AMLC "In Brief"

3/ Source: Analytical tables, Nimexe 1984 and 1985 - External Trade, Eurostat

4/ Source: Various issues of the Weekly Bulletin, Junta Nacional De Carnes, Argentina

5/ Source: Volume 13/Number 1 and Volume 14/Number 4 of The New Zealand Meat Producer

6/ Source: Estadisticas - Diciembre 1984 y Julio 1985, Instituto Nacional De Carnes

7/ Source: GATT Replies to questionnaire

8/ Source: USDA - Dairy Livestock and Poultry - Trade and Prospects (February 86 and August 86)

9/ For statistical purposes includes Morocco, Tunisia, Ivory Coast, Togo, Ghana, Nigeria, Gabon and Congo

10/ January-June

11/ January-May

12/ January-September

13/ October 85-June 86

14/ Provisional figures for January-June 1986, expressed in carcass weight equivalent

NOTE: Figures may not add up due to rounding

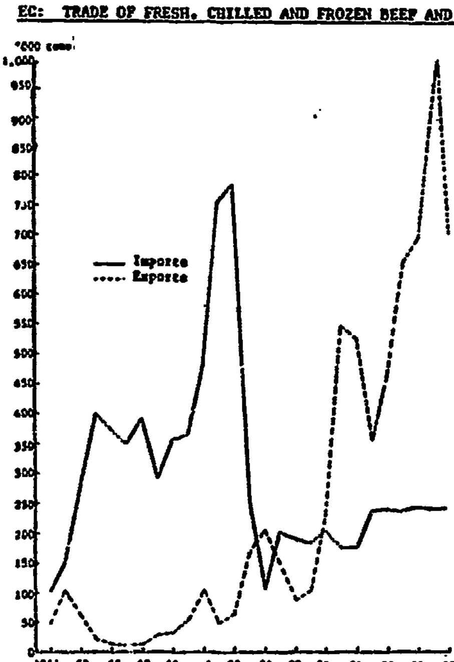
II. COUNTRY-BY-COUNTRY ANALYSIS

EUROPEAN COMMUNITY

12. Cattle and calf numbers in the European Community (12) were estimated at 82,800,000 head at the census in December 1986, 1.4 per cent less than year earlier. This was due to a drop in dairy cows (-4.0 per cent) and heifers (-4.0 per cent) as a result of the EC dairy programme, as well as to a fall in the numbers of young male animals (-0.8 per cent). Beef cow numbers were expected to increase (+2.0 per cent) as were those of calves (+0.2 per cent). Cattle and calf slaughter is estimated to have totalled some 30,800,000 head (EC(12)) in 1986, 5.3 per cent more than in EC(10) in 1985. However, average slaughter weights are believed to have decreased somewhat (-0.6 per cent). For 1987, a drop in slaughter is forecast (-3.8 per cent). Production of bovine meat totalled 7,760,000 tons in the EC(12) in 1986, some 4.7 per cent more than in EC(10) in 1985. The increase was due to the recent adherence of Portugal and Spain to the Community. In 1987, a reduction of some 2 per cent is forecast as a result of cyclical factors, lower carcass weights, and the contraction of the dairy cattle herd as a consequence of the 1984/85 dairy quotas. However, the forecasts will probably be modified by the recently agreed measures by the European Community (which include a 9.5 per cent cutback in dairy quotas in the coming two years). Other measures include the change in the intervention price level (intervention purchases will only take place when the average Community market price is at 91 per cent of the intervention price and simultaneously the member country market price is at 87 per cent). Intervention stocks in the Community totalled 508,452 tons at the end of September 1986, a reduction of 28.4 per cent, compared to the record high level at the end of September 1985. Estimates put end of year stocks (1986) at 715,000 tons (875,000 tons at the end of 1985), 75,000 tons of which would be private stocks. Projections for the end of 1987 suggest total stocks of 400,000 tons, but again these could be modified by the above-mentioned measures.

13. Consumption of beef and veal in the Community (12) was estimated at 7,600,000 tons in 1986, and 23.5 kg. per capita. This would be 8.3 per cent more and 8.6 per cent less, respectively, than in 1985 (EC(10)), both the higher and the lower figure being explained largely by the presence in the statistics of 1986 of two new members. In spite of the anticipated fall in production, consumption of beef and veal is expected to remain unchanged in 1987. As concerns trade, the EC imported a total of 390,000 tons of bovine meat in 1986, 1.3 per cent less than in 1985. A major part of the meat originated from Austria and Yugoslavia (fresh and chilled), and from Brazil and Argentina (frozen). Imports of processed and canned beef and veal were by and large from Brazil. Beef and veal exports from the Community broke all previous records in 1986 since they reached about 1,000,000 tons, surpassing the 1985 record level by 36.4 per cent. This volume of exports was only made

EC: TRADE OF FRESH, CHILLED AND FROZEN BEEF AND VEAL



possible by the urgent and large import needs of Brazil. Indeed, the EC sold about 300,000 tons of beef to that country in 1986, most of which was to be delivered before the end of the year. Other destinations for large volumes of EC beef were the USSR, Egypt, Iraq and Iran. A drop in exports is forecast for 1987.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:1/	78,766	84,000	+6.6	82,800	-1.4
Beef and veal:2/					
Production	7,410	7,760	+4.7	7,600	-2.1
Consumption	7,017	7,600	+8.3	7,600	0.0
Imports	395	390	-1.3	390	0.0
Exports	733	1,000	+36.4	680	-32.0

1/ '000 head, December of preceding year 2/ '000 tons

Note: All figures for 1985 are for EC(10) and for 1986 and 1987 for EC(12).

AUSTRIA

14. After four years of growth in cattle numbers, the Austrian cattle herd showed a decline of 0.5 per cent at the census in December 1985. Dairy cow numbers fell by 1 per cent, those of beef heifers by 4.5 per cent, steers by 8.6 per cent, and those of calves by 0.7 per cent. Cattle and calf numbers totalled 2,655,000 head compared to 2,669,000 head the year before, the latter figure being at a record high level. The December 1986 census was expected to show a further decline. Slaughter rates decreased by some 2.4 per cent in 1986 according to estimates. Preliminary data for 1986 suggest that production decreased by 1.8 per cent, indicating a drop in average slaughter weights. A further production decrease is forecast for 1987. Consumption of beef and veal fell for the fourth consecutive year in 1984/85 reaching, with 159,500 tons (21.1 kg./capita), the lowest level in twenty years and a 7.3 per cent decline compared to year earlier. This drop is explained by a fall in disposable income and a rise in bovine meat retail prices. The price of competing meats also increased but to a lesser degree. In the absence of data, it is assumed that consumption continued to fall in 1986 for much the same reasons.

15. Austria exported some 26,000 tons of fresh and chilled bovine meat in the first half of 1986, compared to 30,000 tons in the same period a year earlier, a drop of 13.3 per cent. In view of this reduction it does not seem likely that exports in 1986 broke the record level of those in 1985, although they probably reached around 52,000 tons. Austria's major customer for fresh and chilled bovine meat is Italy, who takes around 90 per cent of the beef exported. Austria also traditionally exports live cattle although the numbers have declined substantially in recent years. In the first half of 1986, 6,000 head were exported, the same number as in the same period in 1985, but much less than in 1984.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:1/	2,655	2,626 4/	-1.1	..	..
Beef and veal:2/					
Production	223 4/	219 4/	-1.8	217 4/	-0.9
Consumption 3/	160	..	..	..	..
Exports	56	52 5/	-7.1	50 5/	-3.8

1/ '000 head, 1 December   2/ '000 tons   3/ 1984/85, 1985/86, 1986/87

4/ Estimate by USDA, Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1986

5/ Secretariat estimate

FINLAND

16. Cattle and calf numbers were expected to show a decrease of some 2.4 per cent, to 1,529,000 head, at the December 1986 cattle census. As in the last several years, dairy cow numbers dropped (-3.6 per cent) as a result of continued efforts to curb dairy production. It is projected that the herd will continue to contract in the next year, in particular the dairy female part. Slaughter totalled 633,600 head in 1985, an increase of 0.8 per cent compared to year earlier. Adult female and male slaughter increased somewhat (by 1.9 per cent and 1.6 per cent respectively) while that of calves dropped (by 10.2 per cent). Slaughter is expected to have decreased in 1986, in particular that of female cattle. Total bovine meat production in 1986 amounted to some 122,000 tons, a minor part of which was that of veal. Production of the latter has been falling for many years, from 24,000 tons in 1965 to 690 tons in 1985, while in the same period beef rose by 33.3 per cent. A further decrease in beef and veal production is projected for 1987, indicating a higher rate of female cattle slaughter in the mix rather than a drop in total slaughter. Consumption of beef and veal expanded by some 1 per cent in 1986, totalling 104,000 tons (21 kg./capita). This was due essentially to a drop in exports of beef and veal. Pork, poultry and sheepmeat consumption is expected to have risen in 1986 as a result of higher production and competitive prices. For instance, preliminary figures indicate around 159,000 tons of pork consumed in 1986, 1.9 per cent more than in 1985. For 1987, beef and veal consumption are forecast to remain at 1986 levels whereas an increase is projected for that of other meats. Exports of beef and veal fell by some 13.2 per cent in the first half of 1986, to 10,817 tons. A major part (6,334 tons) was exported in processed form and main customers were Egypt and Syria. The USSR, the other major client, imported fresh, chilled and frozen beef and veal. Prior to 1985, most of Finland's bovine meat exports were fresh, chilled and frozen but since 1985 a major part of the beef is exported processed. Total bovine meat exports in 1986 are estimated to have dropped by some 21.7 per cent to 18,000 tons. A further drop is projected for 1987, as a result of the anticipated fall in production.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:1/	1,567	1,529	-2.4	1,497	-2.1
Beef and veal:2/					
Production3/	125	122	-2.4	119	-2.5
Consumption	103	104	+1.0	104	0.0
Exports	23	18	-21.7	15	-16.7

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

3/ Includes production from animals slaughtered both in slaughterhouses and on farms

SWEDEN

17. Herd liquidation in Sweden began in 1982 in line with Government policy, and continued in 1986. The June 1986 cattle census showed a decline in numbers of 5.7 per cent, putting the herd at 1,733,000 head (a 10.6 per cent decrease since 1982). The drop was unusually sharp, compared to previous years, as a result of the effects of the two-price system for milk which has led to an increase in dairy cow slaughter and thus a contraction in dairy cow numbers of some 6.8 per cent. Further herd reductions are anticipated for 1987 and 1988, but less sharp ones. Cattle slaughter is estimated to have decreased by some 4.3 per cent in 1986, totalling 691,000 head. In the first half of the year slaughter dropped by some 1.8 per cent compared to year earlier. More cutbacks are forecast in the next two years. Production is expected to show a corresponding fall, totalling 148,000 tons in 1986.

18. Consumption of bovine meat is expected to have remained stable at some 136,000 tons or 16.3 kg. per capita in 1986, in spite of a drop of 4.6 per cent in the first half of the year. It is forecast that consumption in 1987 will stay at the same level before rising somewhat in 1988. Retail prices of beef remained reasonably stable during 1986 with only a very marginal increase and, even compared to year earlier, price rises were not large. The explanation for the consumption expansion in 1985 lies largely in stable prices and the intensive sales campaigns that have taken place at irregular intervals. Sweden exported 13,800 tons of bovine meat in the first six months of 1986, 12.7 per cent less than year earlier. For the whole of 1986, it is expected that 23,000 tons will have been exported, compared to 35,400 tons in 1985. The contraction of exports is related to the cutback in production and is forecast to continue in 1987 and 1988. Most of the decline took place in exports of fresh and chilled beef whereas frozen beef exports increased. Main destinations for the latter in 1986 were the United States, Taiwan and the Philippines.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:1/	1,838	1,733	-5.7	1,713	-1.2
Beef and veal:2/					
Production	157	148	-5.7	143	-3.4
Consumption	136	136	0.0	136	0.0
Exports	35.4	23.0	-35.0	14.0	-39.1

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

NORWAY

19. The June 1986 census showed a 0.4 per cent decrease in cattle numbers after a less than 1 per cent increase the year before. The drop in numbers (to 968,000 head) was entirely due to the reduction in dairy cows (-2.9 per cent) and dairy heifers (-0.6 per cent), a reduction which was largely the result of Governmental measures. These were introduced to make the keeping of a great number of milk-producing cows less profitable under the two-price system. As a result of the 1985 abolition of the slaughter premium for calves, calf numbers increased by 2.1 per cent in 1985 and by a further 0.9 per cent in 1986. Another production stabilization measure, consisting of a system of decreasing prices for heavy beef carcasses, was also terminated recently since these, and other measures, have now resulted in a better balance between supply and demand on the domestic market. Slaughter of cattle and calves fell by 7.3 per cent in the first half of 1986, compared to the same period in 1985, and is expected to have decreased by 6.3 per cent for the year as a whole. However, since average slaughter weights were higher than year earlier, production is estimated to have increased by some 0.8 per cent to 73,000 tons, in spite of a 1.1 per cent decrease in the first half of the year. Market balance in the bovine meat sector in Norway was also helped by an increase in consumption due to better economic conditions. Thus, consumption of bovine meat expanded by some 4 per cent in 1985 and another 8 per cent in the first half of 1986. Since consumer subsidies were further reduced in June 1986 and since the annual agricultural agreement resulted in price rises, demand levelled off somewhat in the second half of the year, leading to a total consumption for 1986 only very slightly superior to year earlier. Imports of bovine meat in 1986 totalled 3,000 tons, compared to 1,800 tons in 1985. In 1987, production is expected to remain stable, while consumption should decline somewhat as a result of the total abolition of consumer subsidies. Consequently, imports are also expected to decline.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:1/	972.0	968.0	-0.4	968.0 3/	0.0
Beef and veal:2/					
Production	72.4	73.0	+0.8	73.0	0.0
Consumption	74.6	74.7	+0.1	74.5 3/	-0.3
Imports	1.8	3.0	+66.7	2.0 3/	-33.3

1/ '000 head, 1 June 2/ '000 tons 3/ Secretariat estimate

SWITZERLAND

20. The April 1986 cattle census showed a decrease in numbers of 1.3 per cent to 1,902,000 head, a slightly higher reduction than earlier anticipated, due entirely to a 0.4 per cent drop in dairy cow numbers instead of the very slight increase expected, and to a more substantial decline in calf numbers (2.5 per cent) than earlier forecast (-1.7 per cent). Dairy heifers and beef heifers decreased as forecast (by 1.3 per cent and 1.4 per cent respectively), possibly because of the current over-production situation, making more prudent production decisions necessary. Cattle and calf slaughter fell by 4.0 per cent during the first half of the year compared to the same period a year earlier, totalling 418,300 head. In view of the abundance of slaughter cattle offered on the market total inspected slaughter is not likely to have shown a large decrease in 1986, perhaps 1-2 per cent could be expected. Production of bovine meat amounted to 84,800 tons in the first half of 1986, 4 per cent less than year earlier. Production in the second half of the year is likely to have been greater in view of the plentiful offers of heavy animals which would mean a drop in production of only 0.6 per cent for the year as a whole. A further small drop should take place in 1987.

21. Producer prices (average prices for heifers and steers) fell from Frs 562 per 100 kg. in the fourth quarter of 1985 to Frs 550 in the first quarter of 1986 and to Frs 529 in the second quarter. Prices also fell at the wholesale and retail level from Frs 1,100 and Frs 1,872 per 100 kg. respectively in the last quarter of 1985 to Frs 1,026 (-6.7 per cent) and Frs 1,748 (-6.6 per cent) respectively in the second quarter of 1986. In the same period, pigmeat* prices dropped from Frs 1,957 to Frs 1,818 per 100 kg. (-7.1 per cent). In spite of falling retail prices, consumption of bovine meat declined by 1.8 per cent in the first half of 1986, to 88,800 tons. This would be due to higher levels of consumption of other

*Pork for roasting and stewing

meats and in particular of poultry meat. For 1986 as a whole, it is to be expected that consumption of bovine meat will have decreased somewhat compared to 1985, a decrease that is forecast to continue in 1987. Imports of bovine meat were not much larger in 1986 than those of 1985, that is, around 11,000 tons, in view of the surplus situation.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:[1/]	1,926	1,902	-1.2	1,872	-1.6
Beef and veal:[2/]					
Production	169	168	-0.6	167	-0.6
Consumption	183	178	-2.7	175	-1.7
Imports	10.1	11.0	+8.9	10.0	-9.1

[1/] '000 head, 21 April [2/] '000 tons

YUGOSLAVIA

22. Cattle and calf numbers in Yugoslavia in 1986 totalled 5,034,000 head, 3.2 per cent less than year earlier. This was the fifth consecutive year of herd reductions, but it is believed that it was the final year of liquidation and a slight increase is projected for 1987. Cattle and calf slaughter fell by some 0.7 per cent in 1985 but is likely to have recuperated slightly in 1986 although no official figures are as yet available. Estimates for beef and veal production* in 1986 indicate a 5.3 per cent fall in output, compared to 1985, to 360,000 tons, suggesting a drop in average slaughter weights. An improvement is forecast for 1987. Consumption of bovine meat in Yugoslavia is estimated at 317,000 tons* in 1986, up by 1,000 tons from year earlier, in spite of the big price increases that have occurred for beef at the retail level since around the middle of 1985. In the third quarter of 1986, average retail prices, for instance, were 52.7 per cent higher than those of the first quarter and 97.0 per cent higher than during the third quarter of 1985. The rise in retail prices followed rather closely that of the average price received by producers. These price increases were presumably meant in part as an encouragement to bovine meat producers to expand output but also as compensation for high levels of inflation. Yugoslavia, a traditional exporter of bovine meat, in particular of "baby beef" exported some 25,300 tons in the first half of 1986, 25 per cent less than year earlier. For the year as a whole, it is expected that exports of beef and veal will have reached at least 45,000-50,000 tons. Yugoslavia's major customers in 1986 were Italy, Greece, Kuwait and Iran.

*Source: OECD (statistics submitted by Yugoslavia to the OECD Meat Group in June 1986)

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:1/	5,199	5,034	-3.2	5,175 4/	+2.8
Beef and veal:2/					
Production	352 4/	360 4/	+2.3	370 4/	+2.8
Consumption	316 4/	317 4/	+0.3	320 4/	+0.9
Exports	54.7	25.3 3/	..	..	

1/ '000 head 2/ '000 tons 3/ January-June 4/ Source: OECD Op. Cit.

BULGARIA

23. According to recent information, cattle herd liquidation continued unabated in Bulgaria in 1986 and even accelerated. Herd numbers totalled 1,706,000 head, 2.6 per cent less than in 1985 and 5.6 per cent less than at their cyclical peak in 1982, a year when numbers also reached an all time record level (1,807,000 head). Comparing the herd structure at its peak with 1986, it appears that a change is taking place towards more beef cows, a category that has expanded by almost five times since 1982 while dairy animal numbers have fallen off by some 7.4 per cent during the same period. Slaughter of bovine animals increased by some 2 per cent during the first half of 1986. However, because of lower slaughter weights, production of beef and veal dropped by 1.6 per cent to 63,000 tons. Total production in 1986 should be around 132,000 tons, 1.5 per cent less than year earlier. More than 70 per cent of the meat should be veal.

24. There was a considerable increase in beef and veal exports from Bulgaria during the first half of 1986. Exports totalled some 5,000 tons of frozen meat, mostly veal ("baby beef"), the majority of which was sold to Jordan. Total exports in 1986 probably reached some 11,000 tons.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:1/	1,751	1,706	-2.6	..	
Beef and veal:2/					
Production	134	132 3/	-1.5	..	
Consumption	122 3/	120 3/	-1.6	..	
Exports	9.4	11 3/	+17.0	..	

1/ '000 head 2/ '000 tons 3/ Secretariat estimate

HUNGARY

25. Herd liquidation continued in Hungary in 1986 for the fourth year in a row. Cattle and calf numbers totalled 1,766,000 head, 7.1 per cent less than year earlier. Of those, 688,000 head were dairy cows, 5.1 per cent less than in 1985. The present herd size is the smallest registered in more than 25 years. It seems that herd liquidation may be slowing down since slaughter in the first three quarters of 1986 dropped by some 18.5 per cent to 264,000 head. A large part of the slaughter cutback took place in adult male slaughter (-26.1 per cent) while cow and heifer slaughter diminished less (-13.4 per cent) and that of calves actually increased (+2.4 per cent). Even though there is usually an upswing in the fourth quarter of the year, slaughter for the whole of 1986 should have remained well below year-earlier levels. Controlled production of beef and veal (70 per cent of total production) fell by 18.6 per cent in the first nine months of 1986, due to the slaughter decrease, and for the year as a whole a reduction of 19.1 per cent, to 106,000 tons, was registered. Consumption of bovine meat declined much less than production and amounted to some 87,000 tons for the whole of 1986. Hungary, a traditional exporter, imported 9,200 tons of beef in the first three quarters of 1986 compared to negligible quantities in the same period the year before. Exports January-September 1986 declined by some 27.8 per cent to 26,700 tons. A major part of the exports of bovine meat was frozen and destined mainly for the Soviet Union. It is likely that total 1986 beef and veal exports remained well below those of 1985. Hungary also exported some 120,000 head of cattle in that period, 4.7 per cent less than year earlier. The main destinations were the USSR, Italy, Lebanon and Saudi Arabia.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:[1]	1,901	1,766	-7.1	..	..
Beef and veal:[2]					
Production	131	106[3]	-19.1	..	..
Consumption	89	87[3]	-2.4	..	..
Imports	3.3	9.2[4]	..	..	..
Exports	63.8	26.7[4]	..	..	..

[1] '000 head, 1 January [2] '000 tons [3] Preliminary
[4] January-September

POLAND

26. Cattle and calf numbers in Poland contracted again in 1986. The June cattle census showed a total of 10,919,000 head, a 1.2 per cent drop compared to year earlier, and one of 8.3 per cent since the most recent high point in 1982. The reduction is largely due to low profitability in the sector. It is believed that liquidation is coming to an end and that some herd rebuilding will be evident before the next census, as prices for milk and slaughter animals were increased on 1 July 1986 making the sector more profitable. Production of bovine meat totalled 680,000 tons in 1985 and although it is anticipated that the new higher prices paid in the meat sector will have had some positive effects on pork and poultry output, increasing total meat production by 8 per cent in 1986 compared to 1985, it is likely that bovine meat production will have remained at the previous year's level.

27. With stable production it could be expected that consumption remained at about its 1985 level in 1986 in spite of rising prices, in particular since the trend in consumption over the last few years has been going upwards. After having fallen sharply in 1981, exports of bovine meat have slowly recuperated, reaching some 15,400 tons in 1985, compared to a record 57,000 tons in 1974 and 23,700 tons in 1980. Poland exported some 7,400 tons of bovine meat, mostly fresh and chilled, in the first half of 1986, 7.5 per cent less than year earlier. However, higher import demand in the second half of the year should have put total exports in 1986 at about 42,000 tons. Of these, 18,500 tons were shipped to Brazil and 12,000 tons to the USSR.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:1/	11,055	10,919	-1.2	11,000	+0.7
Beef and veal:2/					
Production	680	680	0.0	700 3/	+2.9
Consumption	604	604 3/	0.0	620 3/	+2.6
Exports	15.4	42	+172.7	50 3/	+19.0

1/ '000 head, June   2/ '000 tons   3/ Secretariat estimate

SOUTH AFRICA

28. Cattle and calf numbers rose only slightly in 1986 in South Africa, after several years of drought-induced liquidation. A 3.0 per cent growth, to 8,100,000 head, is anticipated for the August 1987 census and a further increase is forecast for 1988. Slaughter of cattle in controlled areas (approximately 70 per cent of total South African slaughter) declined by 5.6 per cent in 1986, indicating that cattle herd rebuilding had started. Average carcass weights of slaughtered animals remained practically the same. Total production of bovine meat fell for the second consecutive year

in 1986 (by 3.1 per cent) to 624,400 tons due to decreased slaughter. Veal production constitutes traditionally only a very minor part of total bovine meat production; in 1986 it was 4,700 tons (0.7 per cent). Total consumption of bovine meat decreased in 1986 by 8.1 per cent to 627,900 tons (19.67 kg. per capita) from its high level in 1985. The difference between production and consumption was made up by stocks and imports. Consumption is expected to increase in 1986 and 1987. Imports of beef and veal totalled 21,300 tons in 1986, close to the figure for the previous year. Most of the meat was imported in frozen form. In 1987 South Africa is anticipating a 10.3 per cent increase in bovine meat imports, nearly all of which are likely to come from neighbouring countries. South Africa also imports cattle on a regular basis. In 1986, a quantity of 149,000 head was purchased, compared to 144,000 head in 1985. It is forecast that live cattle imports will remain at the same level over the next few years.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:1/	7,827	7,867	+0.5	8,100	+3.0
Beef and veal:2/					
Production	644	624	-3.1	610	-2.2
Consumption	683	628	-8.1	640	+1.9
Imports	21.6	21.3	+1.8	23.5	+10.3

1/'000 head, 31 August 2/'000 tons

TUNISIA

29. Cattle and calf numbers in Tunisia are estimated at 660,600 head in 1986, 3.7 per cent more than year earlier, in spite of drought conditions during the year. The biggest increase occurred in beef heifer numbers which expanded by some 20.1 per cent. A further rise in numbers is projected for 1987. Production of bovine meat reached 40,000 tons in 1986, 8.7 per cent more than year earlier. This is 27.8 per cent of total meat production, compared to 42.1 per cent in 1977. However, a drop in bovine meat production is forecast for 1987, a decline with only a short duration, though, since an expansion is planned for 1988. It is possible that the expansion in 1988 will take place as a result of a price increase in 1987. There has reportedly been no price rise since 1984 and as the seventh economic plan (1987-1991) projects a substantial development of national cattle breeding in order to permit bovine meat self-sufficiency as from 1989, it would seem likely that an encouragement to this end in the form of a price rise is probable soon. Consumption of beef and veal in 1986 is estimated to have remained at the same level as in 1985, that is, at 56,500 tons and 7.7 kg. per capita. However, consumption has been declining steadily since 1984 because of the general economic situation and

a further decline is projected for the next two years. Imports of bovine meat (fresh, chilled and frozen) are estimated at 10,300 tons in 1986, 4.6 per cent less than in 1984. In 1987, a further drop in imports will take place. Most, if not all, of Tunisia's beef imports in 1986 originate from the European Community, in particular from the United Kingdom and from France.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:1/	637	661	+3.7	686	+3.8
Beef:2/					
Production	37	40	+8.7	39	-3.8
Consumption	57	57	0.0	54	-4.3
Imports	10.8	10.3	-4.6	9.6	-6.8

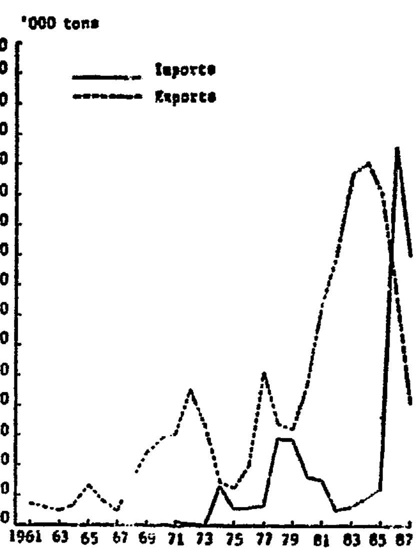
1/ '000 head 2/ '000 tons

BRAZIL

30. Cattle and calf numbers in Brazil have been rising steadily over the last five years, at an annual average rate of about 1.4 per cent. In 1985, the cattle herd totalled about 126,300,000 head and some 128,000,000 in 1986. The annual average of increase in cattle and calf numbers in the last five years was lower than the 3 per cent annual average registered from 1975 to 1980. This was largely due to a strong increase in the slaughter rate of female animals which almost doubled between 1980 and 1985. Other reasons were declining prices, economic recession, drought in major producing areas and competition from poultry. Total cattle and calf slaughter in 1986 amounted to some 9,100,000 head, a decrease of about 11.1 per cent. In February 1986, the Brazilian authorities implemented an "Economic Stabilization Programme" which, inter alia, froze prices and increased individual income levels, especially in the lower income brackets. As a consequence, consumer demand for beef strengthened and the livestock sector became theoretically more attractive for investment. However, the Brazilian producers were reluctant to sell their cattle to the slaughterhouses at the prices fixed by the Government (even though the Government offered to increase prices by 25 per cent), and this was reflected in the end of year figures, not only for slaughter, but also for production. Latest estimates put production in 1986 at some 1,930,000 tons, 13.2 per cent less than in 1985. As already mentioned, consumer demand for beef strengthened and per capita consumption totalled some 16 kg. versus 14 kg. in 1985.

31. The decline in production, coupled with the increase in consumption, has had a serious impact on Brazilian trade in bovine meat. Figures are self explanatory: exports of beef and veal in 1985 totalled 438,000 tons and were, at the beginning of the year, forecast at some 430,000 tons for 1986. Imports totalled 48,000 tons in 1985 and were projected at 100,000 tons in 1986. In reality, Brazil exported only 306,000 tons (exports were partially forbidden) and imported more than 450,000 tons, probably some 500,000 tons. About 300,000 tons were purchased from the European Community; 90,000 tons were bought from the United States, while imports from Uruguay reached at least 83,000 tons. A number of other countries also sold bovine meat to Brazil during the year.

BRAZIL: TRADE OF BEEF AND VEAL



32. The situation in the bovine meat sector also affected the other meat sectors. Indeed, as a result of the lack of beef and veal on the market, domestic demand for other meats grew to such an extent that the Government decided to partially forbid or regulate not only the exportation of beef and veal but also of other meats, to import both pigmeat and sheepmeat and to suspend all import restrictions on bovine meat, pigmeat and fish until the end of 1987.

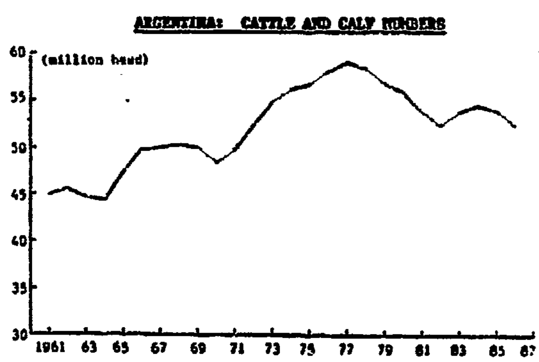
33. The stabilization programme in force in Brazil is expected to continue to have a positive effect on consumer income next year and demand for beef and veal should therefore go on rising in 1987. However, in the medium term, a readjustment or even a total liberalization of beef prices seems inevitable. Apart from the above-mentioned measures to limit exports and allow imports, the Brazilian authorities recently decided to return to the public stocks system in force a few years ago. To this end they have introduced measures concerning the fattening of cattle under a feed lot regime, with the objective of raising the domestic output by some 200,000 tons. As a result of the different measures, production in 1987 is expected to increase by some 14.0 per cent (to 2,200,000 tons) and per capita consumption to remain relatively unchanged or increase slightly. The Government expects imports to total some 180,000 tons, and exports 150,000 tons. However, current trends suggest that imports might be quite substantially higher.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:[1]	126,300	128,000	+1.3	130,600	+2.0
Beef and veal:[2]					
Production	2,223	1,930	-13.2	2,200	+14.0
Consumption	1,915	2,200[3]	+14.9	2,400[3]	+9.1
Imports	48	500[3]	+941.7	350[3]	-30.0
Exports	438	306	-30.1	150	-51.0

[1] '000 head [2] '000 tons [3] Secretariat estimate

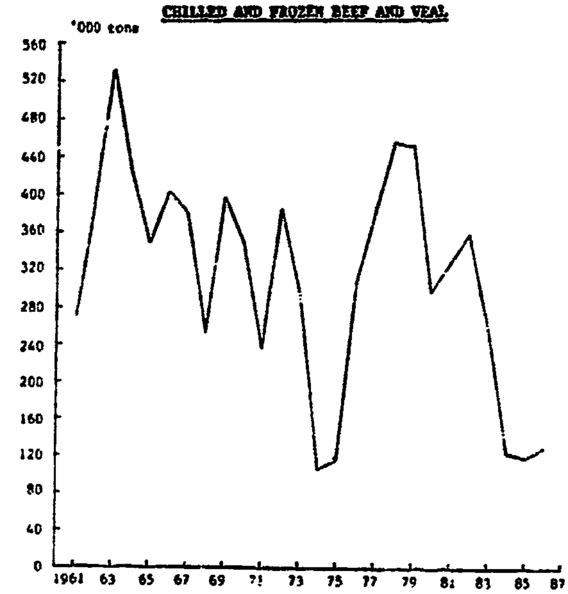
ARGENTINA

34. According to the latest official estimates, cattle and calf numbers in Argentina totalled some 52,500,000 head at the census in June 1986, 2.8 per cent below year earlier. This decline, which began in 1985 after only two years of herd rebuilding, was largely due to depressed prices in both the domestic and international markets. As a result, producers were pushed to sell and/or slaughter their cattle. Following the suspension by the Argentinian authorities of the ceiling prices for slaughter cattle in February 1986, real cattle prices started to increase. The index price at Liniers (1960 = 100) rose from 73 in January to 104 in August. It may consequently have been expected that slaughter rates would begin to decline. However, at the end of August 1986 the inspected slaughterings (which represent about 75 per cent of total slaughterings) were only 0.5 per cent lower than year earlier. Moreover, the inspected slaughter of both heifers and female calves rose by almost 9 per cent during the same period, representing about 27 per cent of total inspected slaughter, compared to 18 per cent in 1983 (when herd rebuilding had started and before its collapse in 1985). This indicates that herd liquidation is continuing in spite of the price recovery. Recent estimates by the Argentinian "Junta Nacional de Carnes" put total beef and veal production for 1986 at some 2,870,000 tons, up by 3.2 per cent as a result of higher average slaughter weights.



35. The reason why slaughter levels did not decline more seems to be due to the continuing rise in domestic demand for beef, notwithstanding increasing retail prices. During the first eight months of the year, the average per capita consumption of beef in Argentina can be estimated at some 86 kg., compared to 82 kg. a year earlier. This appears to be the result of the increased purchasing power of the population, due to a substantial rise in real income, especially of those in the lower income brackets. Total consumption for the year as a whole is currently estimated at 2,630,000 tons, 150,000 tons higher than in 1985. As a consequence of the increase in domestic consumption, which absorbed more than the rise in production, exports of beef and veal in 1986 are expected to have dropped by some 20,000 tons, to 240,000 tons. From January to October 1986 exports totalled about 198,000 tons, down by almost 10 per cent. Exports of fresh, chilled and frozen bovine meat fell by some 11 per cent, while canned and cooked declined by some 10 per cent. The European Community remained the largest market for Argentinian exports of fresh, chilled and frozen beef and veal with a 47 per cent market share, followed by Israel (17.4 per cent), and Brazil (10 per cent). For canned and cooked beef and veal, the United States accounted for 64 per cent and the EC for 21 per cent. The average f.o.b. export price during the first six months of 1986 was about US$1,239 per ton c.w.e., versus US$1,115 per ton during the whole year 1985. In the third quarter the average export price increased to US$1,400 per ton. This was apparently the result of the larger proportion of frozen high-quality beef exported to the European Community, and also of rising prices on international markets.

ARGENTINA: EXPORTS OF FRESH, CHILLED AND FROZEN BEEF AND VEAL



	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers: 1/	54,000	52,500	-2.8	52,000	-1.0
Beef and veal: 2/					
Production	2,740	2,870	+3.2	2,680	-6.6
Consumption	2,480	2,630	+6.0	2,420	-8.0
Exports	260	240	-7.7	260	+8.3

1/ '000 head, 30 June   2/ '000 tons

COLOMBIA

36. After only one year of herd rebuilding the cattle herd in Colombia decreased in 1985 (-1.9 per cent) and again in 1986 (-2.0 per cent) totalling 23,510,000 head at the last census. Dairy cows showed the largest decrease (-5.7 per cent) while beef cow numbers dropped by 2.0 per cent. A further drop in cattle numbers (-2.0 per cent) is anticipated for 1987 before a forecast expansion in 1988. Slaughter levels and average slaughter weights grew in 1986 (by 10.5 per cent and 0.5 per cent respectively) resulting in an expansion of production for domestic consumption to 664,900 tons (+9.2 per cent). Another growth is anticipated in 1987, to be followed by a forecast drop of 6 per cent in 1988 as a result of expected herd rebuilding in that year. Per capita consumption of bovine meat in Colombia increased in 1986 to 22.9 kg. from 20.7 kg. (+10.6 per cent) the year before. A further expansion, to 23.6 kg., is forecast for 1987.

37. Colombia, a traditional exporting country of bovine meat, exported some 3,257 tons of beef in the first six months of 1986, compared to 4,030 tons for the whole year of 1985. According to estimates, it was suggested that some 1,800 - 6,800 tons could be exported in the second half of the year. Exports in 1986 were predominantly to Peru, the Netherlands Antilles and, in the second half of the year, also to Romania, provided the sanitary conditions of the Colombian slaughterhouses were accepted by the Romanians. It is likely, however, that the delivery of the 5,000 tons of beef contracted between Colombia and the Government of Romania, will be spread over a longer period, well into 1987. In 1987, exports of bovine meat are forecast to reach 28,680 tons, a level not seen for a number of years. Another, but smaller, expansion is anticipated in 1988.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:1/	24,000	23,510	-2.0	23,030	-2.0
Beef and veal:					
Production2/	609	665	+9.2	693	+4.2
Consumption2/	609	665	+9.2	693	+4.2
Exports	4.0	5.1	+25.5	28.7	+467.1

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

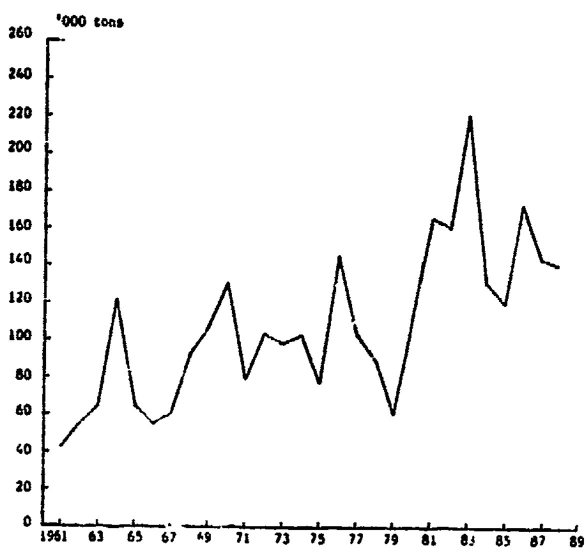
URUGUAY

38. The June 1986 cattle census in Uruguay indicated a 1.1 per cent decrease in numbers, to 9,303,000 head, the lowest figure since 1972, and 19.3 per cent below the peak of 1975. There was a particularly strong decrease in calf numbers (-8.5 per cent), while beef heifers expanded quite substantially (+7.6 per cent) as a result of the large calf crop in 1985.

A further, small (-0.4 per cent) fall in numbers will take place in 1987 before an upturn, equally small, in 1988. Slaughter (inspected*) expanded by some 9.3 per cent in 1986, to 1,423,000 head. With also a higher level of average weights this led to a production of some 380,000 tons, 11.8 per cent more than year earlier, and substantially more (+20.3 per cent) than previously forecast. Total consumption as well as that of per capita (66 kg.) of bovine meat, however, is expected to have remained relatively unchanged in spite of the steep rise in domestic prices (average retail prices were 154.5 per cent higher in the third quarter of 1986 than in that of 1985). It is possible that this rise has at least partly diverted any possible increase in beef and veal consumption to that of poultry and, in particular, of sheepmeat. Indeed, sheepmeat intake on a per capita basis, although relatively low (16.7 kg.), increased by some 15 per cent.

39. The unexpected increase in production, far from going into local consumption, went to exports which rose by some 50 per cent compared to 1985 (to more than 200,000 tons) and much higher than forecast only a few months ago. This was largely due to the beef exported to Brazil (an estimated 83,400 tons in fresh or chilled form). The increase in production and exports is explained by the rise in export demand and in prices offered on international markets. In 1987 exports are forecast to fall off as herd liquidation slows down and production decreases.

URUGUAY: EXPORTS OF FRESH, CHILLED AND FROZEN BEEF AND VEAL



	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers: 1/	9,402	9,303	-1.1	9,270	-0.4
Beef and veal: 2/					
Production	340	380	+11.8	318 to 350	-16.3 to -7.9
Consumption	186	186	0.0	186	0.0
Exports	134	201	+50.0	132 to 164	-34.3 to -18.4

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

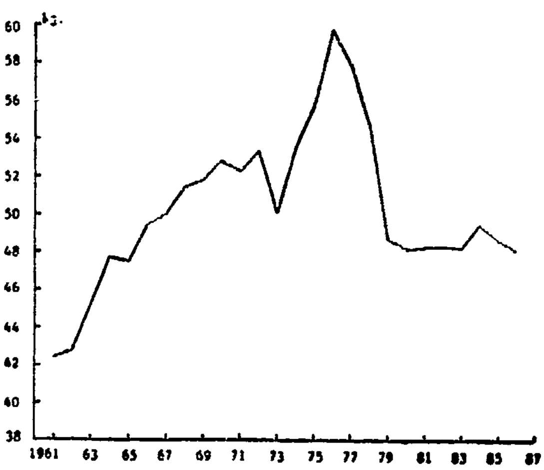
*Inspected slaughter in 1986 was 82.4 per cent of total slaughter. Total slaughter increased by 8.3 per cent.

UNITED STATES

40. According to the 1 January 1986 cattle census, cattle and calf numbers in the United States totalled 105,468,000 head, down by 3.9 per cent from year earlier and the lowest level since 1967. The more recent cattle census of 1 July showed that herd liquidation had continued at a rate of some 3-4 per cent which would put cattle and calf numbers at some 101,250,000 head by 1 January 1987. However, it is believed that herd liquidation is now approaching its end as a consequence of good pasture conditions (except in the drought-hit south-east regions), low feedgrain prices, generally lower production costs and higher producer prices, compared to 1985. (Nevertheless, already large total meat supplies are expected to expand in 1988 from moderately lower levels projected for 1987. The impact of these larger meat supplies will be to slow the rate of any beef herd expansion at least through the early 1990's.) Commercial cattle slaughter (about 99 per cent of total slaughter) totalled 18,458,000 head during the first half of 1986, up 2.8 per cent from year earlier. Cow slaughter registered a 10 9 per cent increase partly as a result of the Dairy Termination Programme. However, the upward trend in slaughter has slowed down since and the slaughter mix has begun to change. Last October, even though cattle slaughter was one per cent above year earlier, female slaughter declined by 6 per cent. Heifer slaughter was 8 per cent lower and cow slaughter dropped by 4 per cent. Commercial cattle and calf slaughter was estimated at some 36,090,000 head for the year as a whole, down by 0.5 per cent.

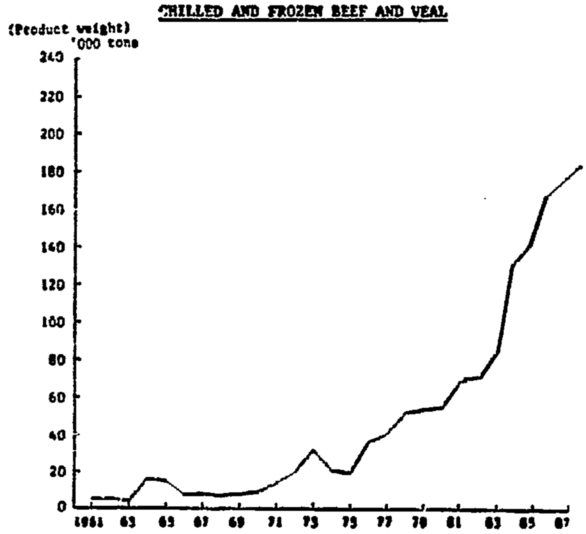
41. Commercial production of beef and veal, at 5,450,000 tons (about 97 per cent of total production) rose by 3.5 per cent during the first half of 1986, compared to year earlier. This was the result not only of increased slaughterings, but also of higher slaughter weights. These latter declined in the second half of 1986 (because of lower dairy cow slaughter and increased non-fed cattle slaughter) but production is expected to have risen, even if only modestly, for the year as a whole. Total beef and veal consumption fell by some 0.3 per cent in 1986, and by about 1.2 per cent on a per capita basis. This was the result of higher retail prices, reflecting increased cattle prices since last June. Since the end of June, prices for choice-fed steers at Omaha have been rising steadily. As this was reflected in the retail price level, the already eroded competitive position of beef compared to other meats, deteriorated further, especially taking into account that poultry meat output is expected to have risen by a further 6 per cent in 1986.

UNITED STATES: BEEF AND VEAL CONSUMPTION PER CAPITA



42. The United States imported some 974,000 tons of beef and veal in 1986, up by 2.9 per cent from year earlier, the major part of which being boneless beef originating in Australia (some 48 per cent of overall imports). In spite of the increase, the 1986 trigger level (653,000 tons, product weight) was not reached. From January to June, live cattle imports almost doubled, totalling 641,400 head, 77 per cent of which came from Mexico. The United States' beef and veal exports have been rising steadily in the last few years. In 1986, exports totalled about 229,000 tons, up by 51.7 per cent from 1985. This figure includes the 90,000 tons which were to be exported as a result of the legislation relating to the Dairy Termination Programme. Virtually all this meat was sold to Brazil, according to a sales agreement between the two countries, but by the end of the year not all meat had been shipped. Apart from this unusual sale to Brazil, Japan remained the major market for the United States exports of beef and veal (fresh and frozen), while exports to Canada (historically the second major market) seem to have declined.

UNITED STATES: EXPORTS OF FRESH, CHILLED AND FROZEN BEEF AND VEAL



43. In 1987 production of beef and veal is projected to fall by 5 to 7 per cent with nearly all the drop expected to occur in the non-fed slaughter cattle categories. However, expanding poultry and pork supplies (especially the latter in the second half of the year) will largely offset this. The beef price recovery, which is expected to continue in 1987, will thus be under pressure.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:1/	109,749	105,468	-3.9	101,250	-4.0
Beef and veal:2/					
Production	10,996	11,059	+0.6	10,395	-6.0
Consumption	11,734	11,697	-0.3	11,112 3/	-5.0
Imports	947	974	+2.9	984	+1.0
Exports	151	229	+51.7	206	-10.0

1/ '000 head, 1 January 2/ '000 tons 3/ Sectretariat estimate

CANADA

44. The 1 January 1986 cattle census showed a continuation of the cattle herd liquidation started in 1976, with a brief interruption in 1981. Numbers totalled 10,590,700 head, a contraction of 3.5 per cent compared to year earlier, and of 25.8 per cent compared to the last peak year (1975). The persistent herd reduction was mainly due to depressed feeder cattle prices. All categories of cattle decreased but prospects for rebuilding are good even if forecasts suggest a continuation of herd contraction into 1987, although at a much slower rate. However, it was expected that beef cows and beef heifers would show an increase at the January 1987 census. By 1988 herd rebuilding should be well on its way, encouraged by recent increases in profitability. Total cattle and calf slaughter slowed down by 0.8 per cent to 4,225,000 head in 1986 with only male cattle slaughter still rising. Average carcass weights increased further by 2.2 per cent. Forecasts for 1987 suggest a further decrease in total slaughter to 4,098,000 head (-3.0 per cent). With slaughter down and slaughter weights up in 1986, production only declined by some 0.1 per cent to 1,033,600 tons, 43,600 tons of which was that of veal. In 1987, bovine meat production should decrease by 5.0 per cent, to 983,000 tons, as a result of decreased slaughter and slaughter weights.

45. Consumption of beef and veal grew in 1986 by 1.0 per cent to 1,041,000 tons and 41 kg. per capita in spite of slightly lower production levels. This would be due to better economic conditions and income levels, as well as to a drop in average retail prices for bovine meat. Also, the relative competitivity of beef and veal vis-à-vis other meats appears to have increased since the reduction in bovine meat retail prices was greater than that of competing meats. Consumption of pork fell by some 1.5 per cent (to 27.8 kg. per capita) while that of poultry increased to 663,000 tons (+4.7 per cent) and 27 kg. per capita. For 1987, a 3 per cent reduction in bovine meat consumption is forecast as production is cut back and prices firm up. Total beef and veal imports by Canada in 1986 amounted to 118,000 tons, 1.8 per cent more than in 1985. A major part of the meat is imported frozen. Main suppliers were the United States, Australia and New Zealand, with only small quantities provided by the European Community before the imposition of countervailing duties on imports from the EC in the first half of the year. Canada also imported 40,000 head of cattle, all of which from the United States. Exports of Canadian beef and veal declined 8.4 per cent in 1986 from the record high level of 1985, totalling 107,300 tons. These exports included 63,000 tons of frozen beef and veal and 40,800 tons of fresh and chilled. Practically all Canadian bovine meat exports are to the United States as well as all cattle exported, which in 1986 totalled some 200,000 head. A further contraction of exports both of bovine meat and live animals is forecast for 1987 as a result of anticipated herd rebuilding and production declines.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:1/	10,980	10,591	-3.5	10,530	-0.6
Beef and veal:2/					
Production	1,035	1,034	-0.1	982	-5.0
Consumption	1,031	1,041	-1.0	1,000 4/	-3.0
Imports	116	118	+1.8	120	+1.7
Exports	117	107	-8.4	95	-11.5
Live cattle:3/					
Imports	56	40	-28.6	55	+37.5
Exports	235	200	-14.9	180	-10.0

1/ '000 head, 1 January 2/ '000 tons 3/ '000 head
4/ Secretariat estimate

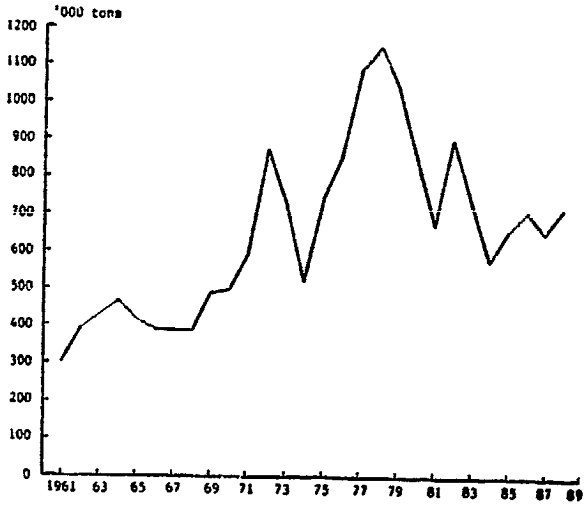
AUSTRALIA

46. After eight years of declining numbers, the Australian cattle census of March 1986 confirmed the rebuilding started the previous year. Cattle numbers showed a 2.1 per cent increase to 23,258,000 head, with dairy cows declining by 1.6 per cent and beef cow numbers expanding by 2.7 per cent. It is expected that the cattle herd will continue to expand over the next couple of years and at a faster rate in 1987 than in 1986, as confidence improves. It is forecast that March 1987 numbers will grow by 0.5 per cent to 23,400,000 head. Slaughter of cattle is forecast to increase by some 6.4 per cent in 1986 (to 7,600,000 head) and bovine meat production by 6.6 per cent due to a change in the slaughter mix. The rise in production occurred mainly in the first half of the year reflecting dry weather conditions, encouraging producers to slaughter cattle. Production was expected to decline in the second half of the year as the weather conditions returned to normal. Better prices since mid-1986 also encouraged cattlemen to cut back production. Total production for the year was forecast at 1,425,000 tons (compared to 1,337,000 a year earlier). As more cattle are held back, production in 1987 is expected to drop (by 6.5 per cent) to 1,319,000 tons, before increasing in 1988.

47. Consumption of bovine meat increased by some 5.6 per cent in the first seven months of 1986 while that of mutton and lamb decreased (by 1.7 per cent and 9.6 per cent respectively). For the year, however only a 1.4 per cent increase in total consumption was expected (to 648,000 tons) while that of per capita should remain at the 1985 level (40.7 kg.). In 1987, consumption levels are forecast to drop back to 633,000 tons because of expected declines in real income, and an increase in retail prices. Bovine meat exports are expected to total some 745,000 tons in 1986, up by 5.4 per

cent and more than previously forecast, but less than the increase in 1985 (+14.6 per cent). The expansion is due mainly to more attractive returns as a result, primarily, of the drop in value of the Australian dollar; to poor seasonal conditions in parts of Queensland which encouraged producers to turn off cattle; and to increased exports to Canada following countervailing action taken against EC beef. At 237,500 tons (product weight) in the first half of the year, Australian exports were 31,000 tons (14.9 per cent) higher than year earlier. However, Australia's main market was still by far the United States, who imported some 147,100 tons (product weight) of beef from Australia during the first six months of 1986, and were expected to buy 285,000 tons (product weight) for the year as a whole. The second largest Australian market, Japan, was expected to import some 97,000 tons of Australian bovine meat in 1986, a 3.2 per cent increase on year earlier. In 1987, total Australian bovine meat exports are forecast at 685,000 tons (carcass weight equivalent) with the main markets remaining the same as in 1986. This 8.1 per cent reduction would be due to production cutbacks.

AUSTRALIA: EXPORTS OF FRESH, CHILLED AND FROZEN BEEF AND VEAL



	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:1/	22,784	23,258	+2.1	23,362	+0.5
Beef and veal:2/					
Production	1,337	1,425	+6.6	1,319	-6.5
Consumption	639	648	+1.4	633	-2.3
Exports	707	745	+5.4	685	-8.1

1/ '000 head, 31 March 2/ '000 tons

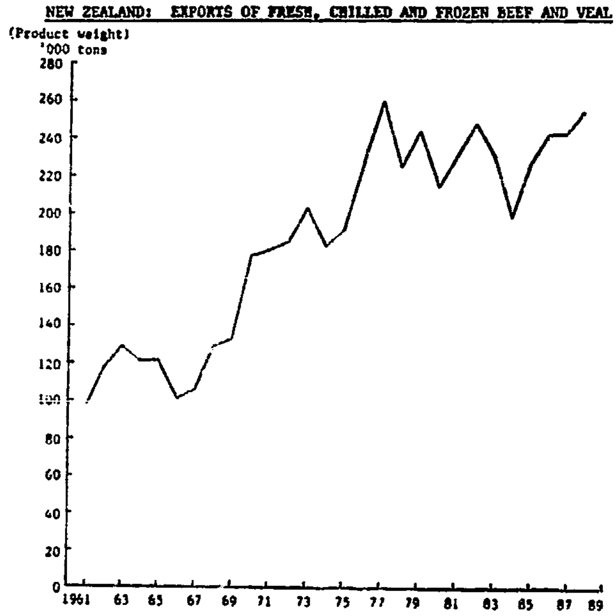
NEW ZEALAND

48. The beef cattle herd in New Zealand was forecast to total 4,700,000 head by 30 June 1986. However, delayed slaughterings, partly due to the meat workers' strike in February and March, resulted in a higher number of beef cattle on farms: 5,000,000 head. Added to 3,392,000 head of dairy cattle, total cattle numbers reached 8,392,000 head, up by 5.9 per cent from year earlier. Total cattle and calf slaughter for the 1985-86

season increased marginally (0.2 per cent). However, adult cattle slaughter declined by 5.1 per cent. Apart from the meat workers' strike, delayed slaughterings were also due to the farmers holding back stocks in expectation of higher schedule prices and in an attempt to increase the cattle's weight. As a result of the lower slaughter rates of adult cattle, bovine meat production in the 1985/86 season is estimated to have fallen by about 4 per cent, to 467,000 tons. However, by the end of the calendar year 1986, beef and veal production was expected to show an upturn. Like in other countries, beef and veal consumption in New Zealand has been affected by the competition of cheaper meats, in particular poultry meat. Indeed, while total beef consumption fell between 1983 and 1986 (years ending 30 September) by about 13 per cent, poultry meat consumption rose by some 57 per cent, pigmeat by 26 per cent, and sheep meat by 7 per cent. In 1986, beef and veal intake should have remained relatively stable at around 118,000 tons, or 35.9 kg. on a per capita basis.

49. In the 1985/86 season New Zealand exports of beef and veal totalled 208,456 tons, product weight (approximately 329,000 tons in carcass weight equivalent), down 8.6 per cent from year earlier. Again, this drop in exports was due to delayed slaughterings which affected the supplies to virtually all destinations. Exports to the United States were 7 per cent lower, to Canada 18 per cent and to Japan about 16 per cent. However, as for production, total exports of bovine meat could show an increase by the end of calendar year 1986. As a result of rising prices in the United States, New Zealand producer prices have been increasing since last June.

NEW ZEALAND: EXPORTS OF FRESH, CHILLED AND FROZEN BEEF AND VEAL



50. Sheep numbers, at 71,650,000 head in 30 June 1986, were 6 per cent higher than expected. This was due to the same reasons that affected cattle and calf numbers: retention of stock by farmers in the expectation of higher weights and prices, and the meat workers' strike. Slaughterings were consequently delayed and sheepmeat production in the 1985/86 season is estimated to have declined by some 15 per cent. Total meat consumption is estimated to have increased by some 6.4 per cent, to 96 kg., as a result of lower sheepmeat prices. Exports of lamb for the 1985/86 season, and until last June, were 3.5 per cent higher, while exports of mutton were 17 per cent below year earlier. On-farm slaughter, due to very low prices, was the reason for the drop in mutton exports. As from 21 December 1985, the responsibility for exporting sheepmeat was transferred from the Meat Producers Board to the private companies. In 1986/87, the overall situation in the livestock sector is expected to improve and production and exports of both bovine meat and mutton are projected to increase significantly. However, both production and exports of lamb are forecast to decline by 8 per cent.

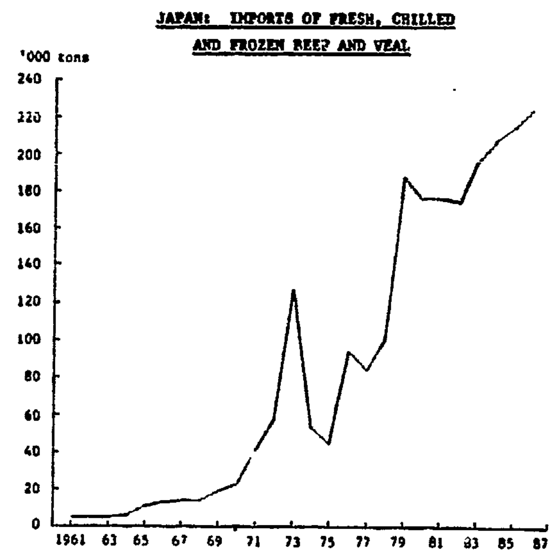
	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:[1]	7,921	8,392	+5.9	8,200	-2.3
Beef and veal:[2],[3]					
Production	487	467	-4.1	535	+14.6
Consumption	118.2	118.0	-0.2	114.0	-3.4
Exports[4]	228 (356)	208 (329)	-8.6 (-7.6)	266 (415)	+27.6 (+26.1)

[1] '000 head at 30 June [2] '000 tons [3] Year ending 30 September
[4] Product weight. Figure in brackets is the approximate carcass weight equivalent.

JAPAN

51. The February 1986 cattle census showed, contrary to earlier - preliminary - figures, a continuation of the more than decade-long growth in cattle numbers. They reached 4,742,000 head, 0.9 per cent more than year earlier. Dairy cows, dairy heifers and beef heifers declined very slightly, though, while beef cows (Wagyu) rose by more than 2 per cent and steers by 3.6 per cent. It is not unlikely that growth in numbers will slow down further in 1987. Slaughter remained practically stable in Japan during the first half of 1986 but a small rise (+0.9 per cent) in slaughter weights led to an equally small rise in production. In the first half of the year output totalled 256,000 tons compared to 253,000 tons in the same period 1985. It seems likely that total bovine meat production in 1986 was marginally higher than that of 1985 (555,000 tons). Consumption of bovine meat increased only very little (0.6 per cent) in the first half of 1986, totalling 366,000 tons. This would be due to lower economic growth in Japan recently. However, demand reportedly increased quite substantially in the second part of the year, causing wholesale prices to rise to above the maximum stabilization price level. Releases of product from LIPC stocks were used to bring prices within the price band again. The rise in demand was due to a cut in retail prices (see paragraph 53). Total consumption of bovine meat in 1986, however, was not expected to be much higher than that of 1985.

52. Japan imported 112,000 tons of beef during the first six months of the year, 8,000 tons more than in the same period a year earlier. A major part of the beef (60.2 per cent) was imported from Australia while the United States provided the second largest share (32.6 per cent). Imports of bovine meat for the whole of 1986 were likely to be in the neighbourhood of 235,000 tons. The Japanese import quota for the first half of fiscal year 1986/87 (1 April - 30 September 1986) was set at 85,000 tons and the second half quota (to March 1987) at 83,000 tons. For the whole fiscal year 1986/87 the quota is 9,000 tons higher than year earlier, that is 168,000 tons, boneless weight. A further increase in in imports is likely to occur in 1987, mainly as a result of understandings with some exporting countries.



53. In order to pass on exchange rate profits from the imported beef to consumers the Japanese Government announced three measures in July as follows: (1) in addition to an earlier reduction of 2.3 per cent as from May, a further reduction of about 10 per cent in LIPC's selling prices as from August was expected to result in a 6 per cent cut in retail prices; (2) around 10 per cent increase in the quantity of imported beef sold through LIPC tenders and auctions; and (3) a 10 per cent rise, as from September 1986, of LIPC-designated meat shops. In October, the Japanese Government announced further measures as follows: (1) in addition to an earlier cut of some 10 per cent as from May, a further cut of about 10 per cent, as from November, in standard retail prices at LIPC-designated meat shops and meat shops participating in the "Beef Day Fair"; (2) a further increase of around 10 per cent, as from November, in the quantity of imported beef sold through LIPC tenders and auctions. These measures followed those introduced earlier to promote beef such as the "simultaneous buying and selling system" (SBS) in 1985, and the "demand development quota" (DDQ) in the first half of 1986.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:1/	4,698	4,742	+0.9	4,760 3/	+0.4
Beef and veal:2/					
Production	555	560 3/	+0.9	564 3/	+0.7
Consumption	781	790 3/	+1.2	799 3/	+1.1
Imports	226	235 3/	+4.0	244 3/	+3.8

1/ '000 head, 1 February 2/ '000 tons 3/ Secretariat estimate

III. SUMMARY OF SITUATION IN CERTAIN BOVINE MEAT IMPORTING OR EXPORTING COUNTRIES NOT SIGNATORIES OF THE ARRANGEMENT REGARDING BOVINE MEAT

SOVIET UNION

54. Cattle and calf numbers on state and collective farms seem to have been increasing in 1986 and they are projected to total some 122,000,000 head by January 1987, up by 1 per cent from year earlier. However, slaughterings are also rising and by the end of the year could be as high as 40,900,000 head, an increase of about 2.8 per cent (recent reports of official data indicate that, from January to August, cattle slaughter increased by 7 per cent). As a result, beef and veal production is projected to rise by about the same percentage, to 7,600,000 tons. However, official production data for the first ten months of the year (9,083,000 tons, live weight) suggest that the annual increase could be stronger. It is expected that imports of meat into the Soviet Union in 1986 were at a lower level than in 1985. This would be a consequence of the overall expansion in meat production and the improved feed situation. Total meat imports are forecast at slightly less than last year's level, which was 857,000 tons, live weight (including meat products). Production of pigmeat is estimated to have risen by about 4 per cent in 1986, decreasing somewhat in the last few months of the year after an increase of about 6 per cent in the first eight months of the year. During this period sheepmeat and poultry meat production is reported to have expanded by 4 per cent and 11 per cent respectively, resulting in a 2 and 4 per cent gain respectively for the year as a whole. Consumption of bovine meat is also expected to be up by some 2.3 per cent, to about 7,865,000 tons.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers: 1/, 3/	121,055	120,800	-0.2	122,000	+1.0
Beef and veal: 2/, 3/					
Production	7,400	7,600	+2.7	7,700	+1.3
Consumption	7,690	7,865	+2.3	7,945	+1.0
Imports	320	300	-6.3	280	-6.7

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

3/ Source: USDA, Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1986

Note: In this section, an asterisk (*) after the country name indicates that data have been provided by the country in question.

CAMEROON*

55. Cattle numbers in Cameroon amounted to some 4,151,177 head in 1986, an increase of 3.5 per cent compared to year earlier and the fourth year of herd rebuilding in a row. A further increase of some 2.5 per cent is forecast for 1987. Production of bovine meat amounted to 93,602 tons in 1986, only slightly higher than year earlier (+0.1 per cent). However, production has been increasing in the country since 1982 and is forecast to rise more substantially in 1987. All bovine meat produced in Cameroon is consumed in the country (9.36 kg. per person in 1986) and some smaller quantities are also imported (36 tons in 1986). Cameroon traditionally imports and, in particular, exports cattle. In 1986 imports amounted to 1,973 head whereas 15,279 head were exported. It is forecast that these figures will rise in 1987 to 2,761 head and 17,987 head respectively.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:1/	4,010	4,151	+3.5	4,255	+2.5
Beef and veal:2/					
Production	94	94	+0.1	96	+2.5
Consumption	94	94	+0.1	96	+2.5
Exports3/	12,483	15,279	+22.4	17,987	+17.7

1/ '000 head, 30 June 2/ '000 tons 3/ live cattle, head

CHILE*

56. After three years of cattle herd liquidation, cattle numbers increased in 1986 by 2.9 per cent to 3,500,000 head. A further increase is expected in 1987. Production of bovine meat stood at 66,500 tons in 1986, down by 1 per cent from year earlier, but by -23.6 per cent compared to the peak in 1983. A large slice of total production, 27.4 per cent, is that of veal. A further increase in meat production is anticipated for 1987. All of the meat produced is consumed domestically and the per capita consumption amounted to 5.42 kg. in 1986, down from a peak of 7.43 kg. in 1983. Chile imports certain quantities of beef regularly. In 1986 these imports totalled 4,000 tons, down by some 34.1 per cent on year earlier.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:[1/]	3,400	3,500	+2.9	3,530	+0.9
Beef and veal:[2/]					
Production	67	67	-1.0	68	+1.8
Consumption	67	67	-1.0	68	+1.8
Imports[3/]	6.1	4.0	-34.1	4.0	0

[1/] '000 head [2/] '000 tons [3/] Product weight

INDONESIA*

57. Cattle numbers in Indonesia totalled 9,538,000 head in 1986, 2.4 per cent more than year earlier, continuing the expansion of the last several years (+48.1 per cent compared to 1980). A further increase is forecast for 1987. Production of bovine meat is expected to total some 269,200 tons, a 3.4 per cent growth over 1985. A further expansion of almost 10,000 tons is forecast for 1987. Indonesia consumes all the bovine meat it can produce, beef being the second most popular meat in the country, after poultry and before pork. Total meat consumption amounted to some 800,000 tons in 1986 or 4.79 kg. per person. A rise is expected in 1987. Indonesia imports some bovine meat each year. The latest figures available indicate that 1,206 tons of fresh, chilled and frozen beef and veal and some 15 tons of processed beef and veal were imported in 1984, 7 per cent more and 25 per cent less, respectively, than year earlier.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:[1/]	9,318	9,538	+2.4	9,763	+2.4
Beef and veal:[2/]					
Production	260	269	+3.4	279	+3.6
Consumption[3/]	755	800	+5.9	846	+5.8
Imports	..	..	..	..	..

[1/] '000 head [2/] '000 tons [3/] total meat consumption

REPUBLIC OF KOREA**

58. Cattle and calf numbers in the Republic of Korea are expected to show a decrease of some 5.9 per cent to 2,854,000 at the December 1986 census. If this is the case, it will be the first time since 1981 that the South Korean herd has contracted, but it is not expected that this occurence will be repeated in 1987 since the herd is forecast to expand by 2.7 per cent to 2,930,000 head by the end of the year. The increase in slaughter in 1986 resulted in a record high level of bovine meat production totalling an estimated 132,794 tons (+13.6 per cent). In view of anticipated herd rebuilding, production is likely to slow down in 1987. Consumption of bovine meat in 1986 is estimated at 136,355 tons, an increase of 13.3 per cent on year earlier. Per capita consumption rose from 2.9 kg. to 3.3 kg. The difference between domestic production and consumption was made up by stocks accumulated in previous years and reported as standing at 5,561 tons at the end of 1985. Due to the domestic surplus situation of both bovine meat and pork, virtually no beef was imported in 1986 (compared to a peak level of 51,045 tons (boneless) in 1982). The situation is not expected to change substantially in 1987, at least not during the first half of the year, since the South Korean Government reportedly is not prepared to lift the import ban (in force since 1984) until cattle numbers fall to a level where cattle prices stabilize.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:1/	3,034	2,854	-5.9	2,930	+2.7
Beef and veal:					
Production2/	117	133	+13.7	..	..
Consumption2/	120	136	+13.3	..	..
Imports3/	2,619	-	-100.0	..	..

1/ '000 head, December 2/ '000 tons 3/ tons, product weight

MALAYSIA*

59. Cattle, calf and buffalo numbers in Malaysia were estimated to have totalled 745,000 head in 1986, up by 4 per cent from year earlier. A similar increase is projected for the current year. Production of bovine meat (including buffalo meat) in 1986 is expected to have increased by 9.4 per cent, to 16,000 tons, and a further rise should occur in 1987.

**Sources: data provided by the country, and various issues of AMLC "In Brief", 1986

Consumption, at some 29,200 tons, was up by 4.3 per cent in 1986, when compared to year earlier, but below the 1984 record level of 29,700 tons. Nevertheless, since the beginning of the 1980's, total consumption rose by about 7 per cent per year, on average, and although this increase was largely due to the population growth, there has also been a slower but steady rise in per capita consumption (2 per cent on average per year). Malaysia is far from being self-sufficient in bovine meat (in 1986 only some 55 per cent of the meat consumed was domestically produced) and has been importing increasing quantities of beef and veal. Although it is estimated that, in 1986, imports declined by almost 4 per cent, to 18,779 tons, it is forecast that in 1987 they will reach as much as 21,400 tons. Since 1983 India, which at the end of 1982 was authorized to export to Malaysia, has been by far the major supplier of this market (its market share in 1985 reached some 88 per cent). Malaysia also imports significant quantities of live animals (including buffaloes).

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:1/	716	745	+4.0	776	+4.2
Beef and veal:2/					
Production	15	16	+9.4	17	+6.3
Consumption	28.0	29.2	+4.3	30.4	+4.1
Imports	19.5	18.8	-3.8	21.4	+13.7

1/ '000 head (including buffaloes) 2/ '000 tons (inlcuding buffalo meat)

QATAR*

60. The cattle herd in Qatar totalled 8,000 head in 1986 (+31 per cent) and is expected to continue to expand, reaching some 8,500 head in 1987. Prior to 1982 there were no cattle in the country, but in that year, 4,270 head were imported and the national herd has increased ever since. Production of red meat is also steadily rising and estimated at some 2,560 tons in 1986, an increase of 123.4 per cent. A further expansion is forecast for 1987. Poultry meat production is also growing quickly in Qatar. In 1986, production amounted to 2,194 tons compared to 1,862 tons the year before. A substantial increase to 4,375 tons is forecast for 1987. Total meat consumption amounted to 28,209 tons or 94 kg. per person in 1986 (+10.9 per cent and 1.3 kg. respectively), roughly half of which is likely to have been poultry meat. A further increase of meat consumption to 30,466 tons and 95 kg., respectively, is forecast for 1987. No import figures are as yet available for 1986, but it seems likely that total beef and veal imports were about the same as, or slightly higher than, in 1985.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:[1/]	6,108	8,000	+31.0	8,500	+6.3
Red meat:[2/]					
Production	1,146	2,560	+123.4	2,720	+6.3
Consumption	25,430	28,209	+10.9	30,466	+8.0
Beef and veal:[3/]					
Imports	2,157	..	..	..	..

[1/] '000 head [2/] tons [3/] fresh, chilled and frozen, tons

SINGAPORE*

61. Singapore reports that January-June 1986 imports of fresh, chilled and frozen beef and veal totalled some 5,137 tons which is approximately the same amount as year earlier. A major part of this was purchased from Latin American countries. Imports of processed bovine meat (canned corned beef) amounted in the same period to some 199 tons, substantially less than year earlier (903 tons were imported in 1985, half-yearly figures for that year are not available). Corned beef imports originated mostly from China and France. A large part of the processed beef is re-exported. In 1985, 443 tons of the total amount imported were re-exported whereas in the first half of 1986, 158 tons were re-exported.

ZIMBABWE*

62. After droughts depleted Zimbabwe's cattle herd over the last few years, rebuilding started in 1985 and continued in 1986 when numbers reached 5,600,000 head (+1.5 per cent). Reportedly, the Government has recently suspended exports to the EC in order to rebuild the herd. A further increase in numbers can therefore be expected and total cattle numbers are forecast at 5,720,000 head in 1987. Production of bovine meat dropped by 15.3 per cent in 1986 to 86,600 tons. The decrease is largely due to the rebuilding efforts. A small recovery to 90,000 tons is forecast for 1987. Consumption of bovine meat also declined in 1986, although by much less than production. Consumption totalled 80,800 tons (-0.6 per cent) with an estimated per capita consumption of 9.3 kg. In 1987 a further consumption cutback is forecast. Zimbabwe, traditionally an exporting country which gets a large part of its foreign exchange earnings from bovine meat exports, exported only 4,500 tons of fresh, chilled and frozen bovine meat in 1986, compared to 15,506 tons the year before, and 2,500 tons of processed beef and veal compared to 2,870 tons year earlier. A large part of Zimbabwe's

bovine meat exports is sent to the EC with whom Zimbabwe has an agreement to sell 8,100 tons of high-grade beef annually. According to available figures and as a result largely of the suspension of beef exports which has reportedly been in force since September, this quantity will not be sold in 1986. Forecasts for 1987 indicate an increase in exports to 8,000 tons for fresh, chilled and frozen beef and veal and 2,750 tons for processed bovine meat. This would be due to increased production and a drop in consumption.

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Cattle and calf numbers:1/	5,519	5,600	+1.5	5,720	+2.1
Beef and veal:2/					
Production	102	87	-15.3	90	+3.9
Consumption	81.3	80.8	-0.6	77.5	-4.1
Imports	4.0	2.5	-37.5	2	-20.0
Exports	15.5	4.5	-71.0	8.0	+77.8

1/ '000 head 2/ '000 tons

Note: Trade figures are in product weight.

IV. SITUATION AND OUTLOOK IN THE INTERNATIONAL PIGMEAT SECTOR

63. World production of pigmeat in 1986 is expected to have risen further, although at a slower rate than that of the near 5 per cent increase in 1985. According to forecasts*, it should total some 55,638,000 tons, up by 1.1 per cent. The slowdown in the rate of increase largely reflects the expected lower increase in China's production (3 per cent in 1986, compared to 14 per cent in 1985) and more or less important drops in the output of some major producing countries such as the United States (-5 per cent), the Soviet Union (-0.8 per cent), Japan (-2 per cent), the Democratic Republic of Germany (-1.4 per cent) and Canada (-2.8 per cent). Pigmeat production in the European Community (including Spain and Portugal) was expected to rise by some 2.9 per cent. In 1987, world production of pigmeat is projected to continue to expand but at a slower rate (0.6 per cent), especially as a result of a strong decrease in the United States' output (-8 per cent). Reflecting large supplies and resulting relatively low prices, world pigmeat consumption in 1986 was expected to increase at approximately the same rate as production (+1.3 per cent) but might decline somewhat in 1987.

64. Revised data for 1985* show a large increase in pork imports by the USSR which, coupled with the strong rise in United States purchases, resulted in a world increase of some 11 per cent, to about 1,483,000 tons.** This was mainly due not only to lower production levels and higher consumption in the above-mentioned countries, but also, more broadly, to a generally low level of prices on international pigmeat markets, largely explained by the depressed level of feedstuff prices. In 1986, and essentially as a result of expected lower import levels in the United States (-4.3 per cent) and in the European Community (-2.5 per cent), world imports of pigmeat could have dropped some 0.5 per cent, to around 1,474,000 tons. In the United States, the lower level of imports was the result of a substantial (-5 per cent) decline in consumption, while in the European Community it was due to higher production and significantly lower export levels (consumption continued to rise). Imports by Japan were estimated to strengthen in 1986 (+3 per cent) as a result of the decline in output. Indeed, in spite of an increase in production in the first months of the year, reduced farrowings since the end of 1985 may have led to lower supply levels for the year as a whole. Continuing rising pork production in Poland since 1985 should have allowed lower import levels in 1986. Moreover, Argentina has re-opened its market to pigmeat imports (up to 15,000 tons), due to a difficult domestic supply situation.

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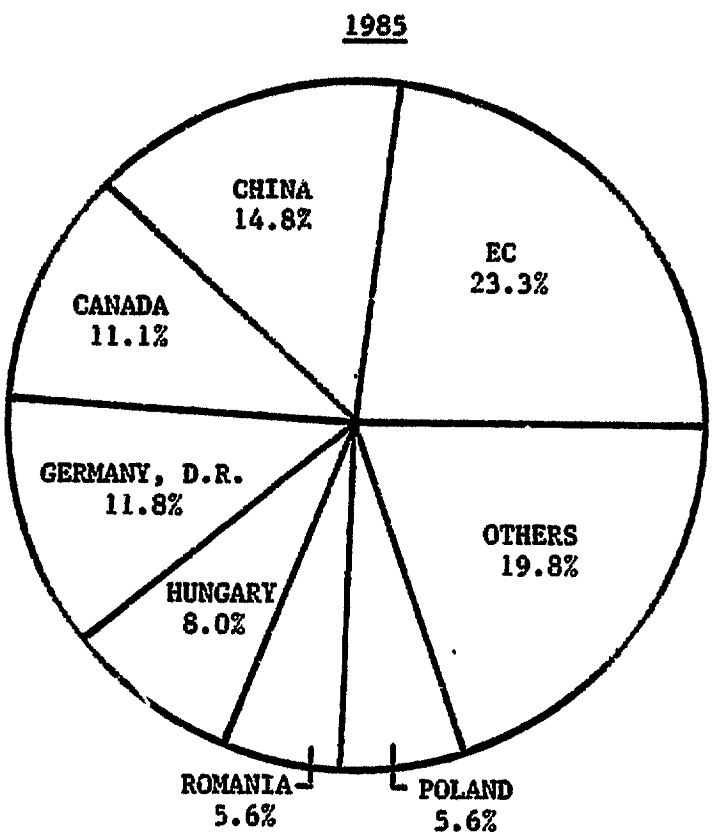
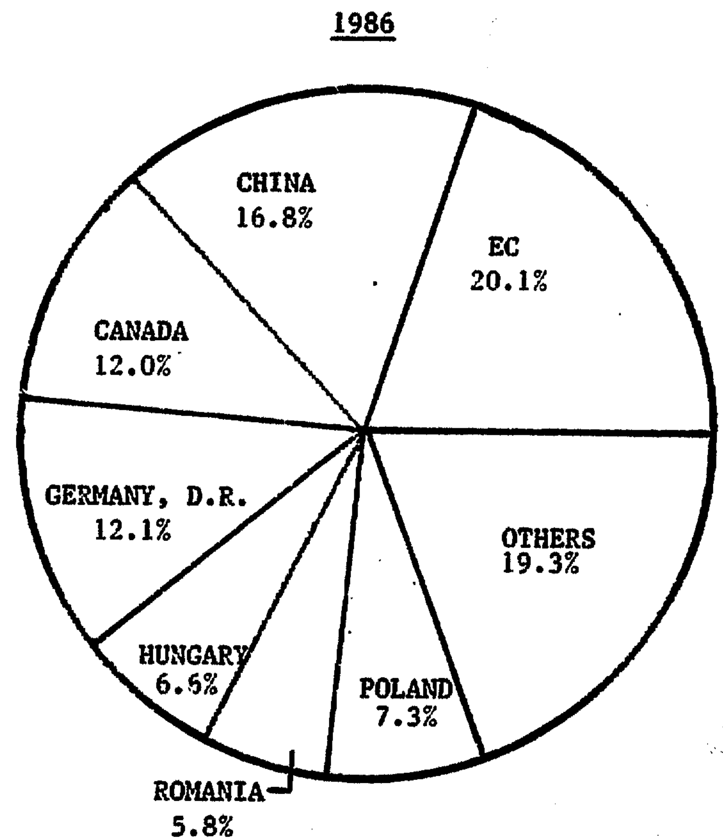
*<u>Sources</u>: Replies to GATT questionnaire; and USDA, Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1986.

**This estimate is the result of the utilization of different sources and can only be used as an indication.

EXPORTS OF PIGMEAT



Total exports: 1,782,000 m.t. (c.w.e.)



Total exports: 1,736,000 m.t. (c.w.e.)

Sources: Replies to GATT questionnaire; estimates by the secretariat; USDA, Dairy, Livestock and Poultry, World, Livestock and Poultry Situation, September 1986.

SELECTED COUNTRIES' TRADE IN PIGMEAT

A. IMPORTS[1/]

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
United States	512	490	-4.3	499	+1.8
Japan	270	278	+3.0	250	-10.0
USSR[2/]	246	250	+1.6	250	0.0
Hong Kong[2/]	217	225	+3.7	235	+4.4
EC	161	157	-2.5	167	+6.4
Poland	38	30	-21.0	30	0.0
Others	39	44	+12.8	59	+34.1
Total	1,483	1,474	-0.6	1,490	+1.1

B. EXPORTS[1/]

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
EC	416	350	-15.9	400	-14.3
China[2/]	263	292	+11.0	292	0.0
Canada	197	208	+5.6	200	-3.8
Germany, Dem. Rep.[2/]	210	210	0.0	230	+9.5
Hungary	143	114	-20.3	105	-7.9
Romania[2/]	100	100	0.0	125	+25.0
Poland	99	126	+27.3	126	0.0
Sweden	76	66	-13.2	48	-27.3
United States	58	54	-6.9	54	0.0
Others	220	216	-1.8	197	-8.8
Total	1,782	1,736	-2.6	1,777	+2.4

[1/] '000 tons carcass weight, includes fresh, frozen and canned product but excludes live animals. Unless otherwise indicated, data are taken from the replies to questionnaires, or are estimates by the GATT secretariat.

[2/] Source: USDA, Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1986

V. SITUATION AND OUTLOOK IN THE INTERNATIONAL POULTRY MEAT SECTOR

65. World production of poultry meat continues to benefit from ample supplies of low-priced feedgrains and should have reached another record level in 1986 of about 26,200,000 tons*, 3.4 per cent more than year earlier. As in 1985, increases occurred in practically all countries for which data are available. In the United States (32 per cent of world output) production is expected to have risen by some 6 per cent, to 8,346,000 tons. This was the result not only of the feedgrain situation, but also of low domestic retail prices relative to other meats and of a slowdown in economic growth, with its impact on incomes and consumer purchasing power. Another factor which should be taken into account is the quick response of this country's poultry industry to the strong demand for new products. In the European Community, production totalled some 5,455,000 tons (21 per cent of world output and some 40,000 tons more than last year if Portugal and Spain are added to the 1985 figure). This would again be essentially due to low feedgrain prices. Brazilian output should also have risen, partly benefiting from short supplies of beef and veal, while the output of the Soviet Union is expected to have increased by some 2 per cent. Japanese production was likely to rise only marginally. In the Middle East, the expansion of poultry meat production is expected to have accelerated from a 6 per cent rise in 1985, to 9 per cent. World poultry meat output is projected to continue to expand in 1987, and maybe at an even faster rate than presently.

66. With such developments at the production level, and in spite of a generally rising consumption, the level of world trade in poultry meat can only shrink. Indeed, imports are likely to have declined by as much as 6-7 per cent in 1986. Along with rising production, imports by the Middle East were expected to decline. Saudi Arabia, which imports more than half of the poultry meat going to that region, was expected to buy some 30 per cent less, while purchases by Iraq, the region's second largest importer, may have fallen by some 65-70 per cent. In Saudi Arabia self-sufficiency is now close to 70 per cent, while in Iraq it is estimated at above 90 per cent. Self-sufficiency in the Middle East region should currently be around 80 per cent on average, against only some 60 per cent in the period 1978-82. The decline in import demand in this region was somewhat offset by a rise in some Asian countries such as Japan and Hong Kong. This could have been to the advantage of other countries in the region, China and Thailand in particular, which have increasingly been exporting to neighbouring countries. While exports by the European Community fell, the United States Export Enhancement Programme allowed the exportation of 43,000 tons of frozen poultry to Egypt, putting total exports at an estimated 257,000 tons. It is too soon to estimate precisely the impact of the meat export prohibition implemented by the Brazilian authorities, but the rising domestic demand for poultry meat (provoked by the "cruzado" programme and the difficult beef situation) resulted in a fall in exports. World imports of poultry meat in 1987 should remain relatively stagnant, if not decline somewhat.

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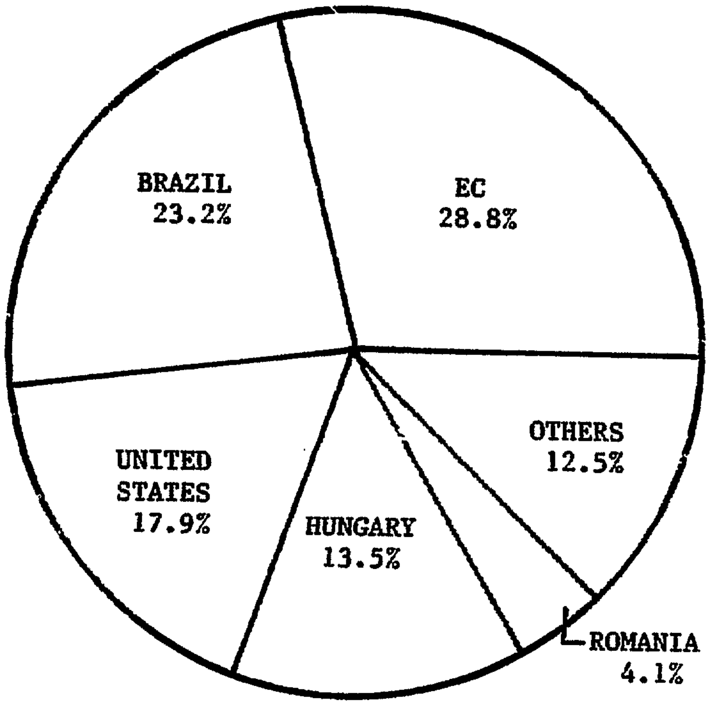
*Sources: Replies to GATT questionnaire and USDA, Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1986.

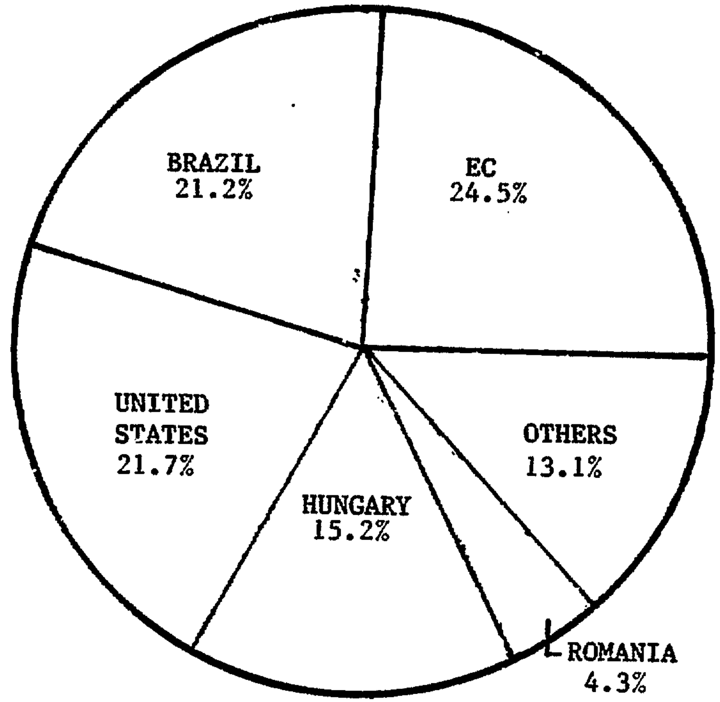
EXPORTS OF POULTRY MEAT

1985



Total exports: 1,179,000 m.t. (ready-to-cook)

1986



Total exports: 1,183,000 m.t. (ready-to-cook)

Sources: Replies to GATT questionnaire; estimates by the secretariat; USDA, Dairy, Livestock and Poultry, World, Livestock and Poultry Situation, September 1986.

SELECTED COUNTRIES' TRADE IN POULTRY MEAT

A. IMPORTS[1/]

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
Middle East[2/]	343	239	-30.3	217	-9.2
USSR[2/]	141	140	-0.7	142	+1.4
Hong Kong[2/]	114	131	+14.9	138	+5.3
Japan	100	122	+22.0	128	+4.9
Egypt[2/]	99	105	+6.1	100	-4.8
EC	85	80	-5.9	80	0.0
Others	114	115	+0.9	125	+8.7
Total	996	932	-6.4	930	-0.2

B. EXPORTS[1/]

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
EC	340	290	-14.7	280	-3.4
Brazil[2/]	274	251	-8.4	251	0.0
United States[2/]	211	257	+21.8	256	-0.4
Hungary	159	180[2/]	+13.2	200[2/]	+11.1
Romania[2/]	48	50	+4.2	50	0.0
Yugoslavia[2/]	30	31	+3.3	33	+6.5
Others	117	124	+6.0	128	+3.2
Total	1,179	1,183	+0.3	1,198	+1.3

[1/] '000 tons, ready-to-cook basis. Unless otherwise indicated, data are taken from the replies to the questionnaire, or are estimates by the GATT secretariat.

[2/] Source: USDA, Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1986.

VI. SITUATION AND OUTLOOK IN THE INTERNATIONAL SHEEPMEAT SECTOR

67. World production of sheepmeat in 1986 was projected* to fall by some 0.5 per cent, to 4,744,000 tons, as a result of the output decline in some major producing countries. The largest drop in production probably occurred in New Zealand, an estimated 15 per cent during the season 1985/86, (but maybe only 5 per cent on a calendar year basis) as a consequence of a conjunction of factors including fairly low lamb prices at the beginning of the year, changes in the agricultural policy, a seven-week strike, shifts from sheepmeat production to more profitable wool production, and a generally difficult economic situation. All this resulted in lower slaughter levels. In the United States high lamb prices and lower feed costs increased the producers' returns, and it is estimated that sheep flocks are stabilizing. Production was expected to decline by some 6-7 per cent but the downward trend should slow down as from 1987. In the Soviet Union production was projected to decline by some 3-4 per cent. In Australia the sheep flock has been expanding quickly since the 1983 drought and was estimated at 156,300,000 head in March 1986. This rapid expansion is essentially due to the rise in profitability of wool production. Total sheep and lamb production was expected to rise in 1986 and will continue to do so in 1987. In the European Community sheep numbers continued their slow but steady upward trend, and in 1986, production should have risen by a further 2 per cent.

68. In spite of a difficult year and delayed slaughterings, New Zealand's exports of lamb in the 1985/86 season increased, but exports of mutton fell.** At an expected 206,000 tons, sheepmeat exports by Australia in 1986 were at their highest level since 1982. Low domestic mutton prices stimulated mutton exports (expected to have risen by some 27 per cent) some 44 per cent of which went to the Middle East (especially to Iran) and Japan. Lamb exports (up by 19 per cent) were boosted by improved demand from Japan and the United States and by a recovery of demand in the Middle East. The difficult supply situation in New Zealand seems to have benefited Australian exports. As a result of increases in the world's two major exporting countries (New Zealand and Australia), exports of sheepmeat are expected to show a further rise in 1987.

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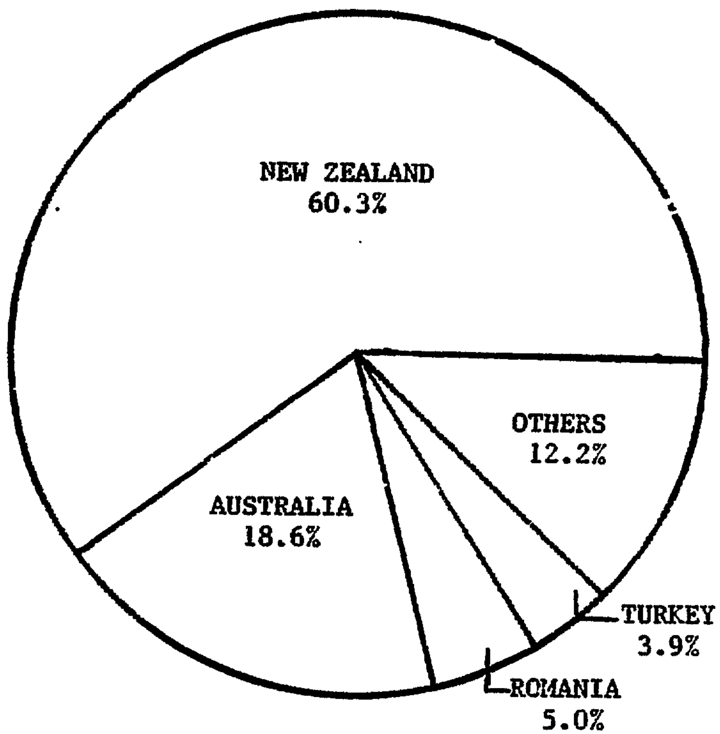
*Sources: Replies to GATT questionnaire and USDA, Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1986.

**See also paragraph 50.

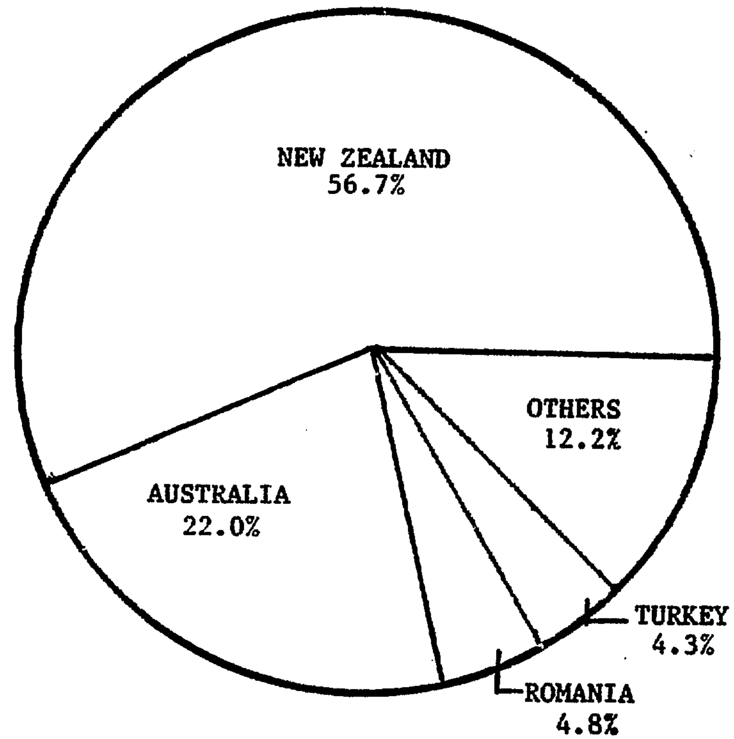
EXPORTS OF SHEEPMEAT

1985



Total exports: 901,000 m.t. (c.w.e.)

1986



Total exports: 936,000 m.t. (c.w.e.)

Sources: Replies to GATT questionnaire; estimates by the secretariat; USDA, Dairy, Livestock and Poultry, World, Livestock and Poultry Situation, September 1986.

SELECTED COUNTRIES' TRADE IN SHEEPMEAT[1]

A. IMPORTS[1]

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
EC	253	242	-1.2	240	-0.8
Japan	159	160[2]	+0.6	160[2]	0.0
USSR	21	20	-4.8	20	0.0
Egypt[2]	5	6	+20.0	7	+16.7
Others	50	33	-34.0	35	+6.1
Total	488	461	-5.5	462	+0.2

B. EXPORTS

	1985	1986	%Change 1986/85	Forecast 1987	%Change 1987/86
New Zealand[2]	544	531	-2.4	560	+5.5
Australia	167	206	+23.4	218	+5.8
Romania[2]	45	45	0.0	40	-11.1
Turkey[2]	35	40	+14.3	40	0.0
Bulgaria[2]	30	30	0.0	30	0.0
India[2]	21	27	+28.6	32	+18.5
Korea, Rep. of	15	14	-6.7	14	0.0
Others	44	43	-2.3	40	-7.0
Total	901	936	+3.9	974	+4.1

[1] '000 tons carcass weight, includes fresh, frozen and canned product, but excludes live animals. When not otherwise indicated, data are taken from the replies to the questionnaire, or are estimates by the GATT secretariat.

[2] Source: USDA, Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1986.

ANNEX

STATISTICAL TABLES

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 however been calculated from non-rounded figures. Data are taken from replies to the questionnaire unless otherwise stated.

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

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast	
								1987	1988
ARGENTINA (30 June)	52,500	53,900	54,600	54,000	-1.1	52,500	-2.8	...	...
of which cows	20,300	20,800	21,000	20,800	-1.0	20,600	-1.0	...	...
AUSTRALIA (31 March)	24,533	22,478	22,161	22,784	+2.8	23,258	+2.1	23,362	24,462
of which cows	10,166	9,303	9,265	9,483	+2.4	9,660	+1.9	...	...
AUSTRIA (3 December)	2,546	2,633	2,669	2,655	-0.5	2,626[6]	...	...	...
of which cows[1]	1,379	1,414	1,434	1,429	-0.3	...	...	...	...
BRAZIL (Estimates)	125,188	128,952	132,801	126,300	-4.9	128,000	+1.3	...	...
of which cows	56,278	57,854	59,474	61,139	+2.8	62,851	+2.8	...	...
BULGARIA	1,807	1,783	1,778	1,751	-1.5	1,706	-2.6	...	...
of which cows	706	702	695	686	-1.3	670	-2.3	...	...
CANADA (1 January)	12,088	11,618	11,360	10,980	-3.3	10,591	-3.5	10,530	10,786
of which cows	5,231	4,979	4,967	4,788	-3.6	4,623	-3.4	4,640	4,717
COLOMBIA	24,499	24,275	24,476	24,000	-1.9	23,510	-2.0	23,030	23,267
of which cows	8,844	8,957	8,884	8,784	-1.1	8,558	-2.6	8,383	8,469
EEC[3] (December of previous year)	77,937	78,791	79,728	78,766	-1.2	84,000	+6.6	82,800	...
of which cows	31,002	31,351	31,488	31,072	-1.3	33,760	+8.7	33,175	...
EGYPT[2] (1 November)	4,187	...	...	...	...	...	...	...	...
of which cows	...	...	...	...	...	...	...	...	...
FINLAND (15 December)	1,633	1,588	1,592	1,567	-1.6	1,529	-2.4	1,497	...
of which cows	683	658	651	623	-4.3	601	-3.5	583	...
HUNGARY (1 January)	1,945	1,922	1,907	1,901	-0.3	1,766	-7.1	...	...
of which cows	759	751	735	725	-1.4	688	-5.1	...	...
JAPAN (1 February)	4,485	4,590	4,682	4,698	+0.3	4,742	+0.9	4,760[7]	...
of which cows	2,104	2,140	2,152	2,128	-1.1	2,139	+0.5	...	...

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

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast 1987	Forecast 1988
NEW ZEALAND (30 June)	7,912	7,631	7,776	7,921	+1.9	8,392[1,5]	+5.9	8,200	8,250
of which cows	3,761	3,722	3,760	3,814	+1.4	3,925[1,5]	+2.9	...	...
NORWAY (20 June)	1,009	975	964	972[2]	+0.8	968[4]	-0.4	968[7]	...
of which cows	384	381	392	378[4]	-1.0	367[4]	-2.9	...	...
POLAND (June)	11,912	11,269	11,197	11,055	-1.3	10,919	-1.2	11,000	11,100
of which cows	5,835	5,776	5,759	5,207	-4.0	5,207	-5.6	5,150	5,125
ROMANIA (January)	6,303	6,246	...	...	...	...	...	...	...
of which cows	3,090	3,031	...	...	...	...	...	...	...
SOUTH AFRICA (August)	8,445	8,204	7,923	7,827	-1.2	7,867	+0.5	8,100	8,600
of which cows	4,066	3,973	3,944	3,866	-2.0	3,886	+0.5	...	...
SWEDEN (June)	1,938	1,902	1,878	1,838	-2.1	1,733	-5.7	1,713	1,697
of which cows	731	724	717	705	-1.7	660	-6.4	653	647
SWITZERLAND (April)	1,945	1,933	1,943	1,926	-0.9	1,902	-1.2	1,872	...
of which cows	1,001	1,001	1,000	974	-2.6	970	-0.4	...	...
TUNISIA	578	606	615	637	+3.6	661	+3.7	686	713
of which cows	382	413	424	438	+3.3	469	+7.1	486	505
UNITED STATES (1 July)	124,140	123,540	121,500	109,749	-9.7	105,468	-3.9	101,250	...
of which cows	49,970	49,600	48,700	36,250	-25.6	49,950	+37.8	...	...
URUGUAY (30 June)	11,237	9,704	9,062	9,402	+3.8	9,303	-1.1	9,270	9,304
of which cows	4,091	3,554	3,519	3,641	+3.5	3,602	-1.1	3,608	3,619
YUGOSLAVIA (15 January)	5,464	5,351	5,341	5,199	-2.7	5,034	-3.2	5,175[8]	...
of which cows	3,079	3,050	3,005	2,997	-0.3	2,915	-2.7	...	...

[1] Estimates [2] Includes buffaloes [3] EEC(12) since 1 January 1986 [4] 1 June

[5] Inflated figures due to strike in slaughterhouses, 8,000 would be expected under normal circumstances.

[6] Estimates by USDA Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1986

[7] Secretariat estimate [8] **Source:** OECD

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

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast 1987	Forecast 1988
ARGENTINA - Adult cattle	11,300	10,400	11,200	12,100	8.0	13,700	0.0	13,000[5]	...
Calves	1,100	800	1,100	1,600	+45.5	1,600	0.0	...	...
AUSTRALIA - Adult cattle	7,779	6,633	5,593	5,959	+6.5	6,148	+3.2	5,890	6,100
Calves	1,652	1,470	1,216	1,188	-2.3	1,302	+9.6	1,230	1,200
AUSTRIA - Adult cattle	560	563	624	658	+5.4	...	...	...	...
Calves	196	181	192	188	-2.1	...	..	...	...
BRAZIL - Adult cattle	11,505	11,433	10,176	10,189	+0.1	11,000	+7.5[8]	11,000	...
Calves	93	92	39	44	+12.8	...	...	...	...
BULGARIA - Adult cattle	39	39	39	39	0.0	18[6]	-2.6[6]	...	...
Calves	78	81	82	81	-1.2	37[6]	-5.3[6]	...	...
CANADA - Adult cattle	3,808	3,710	3,579	3,636	+1.4	3,100[3]	-1.9[3]	3,005[3]	2,995[3]
Calves	621	649	689	665	-3.5	442[3]	-2.9[3]	415[3]	405[3]
COLOMBIA - Adult cattle[5]	3,247	2,973	3,174	3,313	+4.4	3,662	+10.5	3,808	3,580
Calves	...	...	...	...	...	...	...	...	...
EEC[2] - Adult cattle	20,389	20,930	22,700	22,231	-2.1	23,220	+4.4	22,550	...
Calves	6,676	6,858	7,306	7,037	-3.7	7,600	+8.0	7,425	...
EGYPT[2] - Adult cattle	1,842	...	...	...	...	...	...	...	...
Calves	...	...	...	...	...	...	...	...	...
FINLAND - Adult cattle	555	551	576	585	+1.6	281[3,6]	-3.8[3,6]	...	...
Calves	93	65	60	49	-18.3	19[3,6]	-20.8[3,6]	...	...
HUNGARY[3] - Adult cattle	427	463	406	464	+14.3	260[4]	-18.5[4]	...	...
Calves	3	3	4	6	+50.0	5[4]	0.0[4]	...	...
JAPAN - Adult cattle	1,355	1,388	1,492	1,537	+3.0	701[6]	+0.3[6]	...	...
Calves	44	45	44	39	-11.4	17[6]	-15.0[6]	...	...

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

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast	
								1987	1988
NEW ZEALAND - Adult cattle	2,221	2,086	1,860	1,848	-0.6	2,083[7]	+12.7[7]	...	...
Calves	1,039	926	829	849	+2.4	865[7]	+1.9[7]	...	...
NORWAY[3] - Adult cattle	359	333	311	323	+3.9	320	-0.9	...	...
Calves	55	62	57	57	0.0	36	-36.8	...	...
POLAND - Adult cattle	3,120	3,008	3,132	3,290	+5.0	...	...	...	...
Calves	1,654	1,611	1,520	1,221	-19.7	...	...	...	...
ROMANIA[3] - Adult cattle	1,238[5]	...	...	...	...	...	...	...	...
Calves	...	...	...	...	...	...	...	...	...
SOUTH AFRICA - Adult cattle	2,215	2,215	2,358	2,272	-3.6	2,142	-5.7	2,155	2,170
Calves	95	99	102	104	+2.0	101	-2.9	102	103
SWEDEN[3] - Adult cattle	607	603	577	584	+1.2	556	-4.8	552	544
Calves	111	114	123	138	+12.2	135	-2.2	135	135
SWITZERLAND - Adult cattle	465	440	473	490	+3.6	241[3,6]	-4.0[3,6]	...	...
Calves	372	353	358	351	-2.0	177[3,6]	-4.3[3,6]	...	...
TUNISIA[5] - Adult cattle	232	244	221	260	+17.6	230[7]	-11.5[7]	...	...
Calves	...	...	...	...	...	...	...	...	...
UNITED STATES[1] - Adult cattle	38,864	35,841	36,793	35,530	-3.4	35,079[6]	-1.3[6]	...	...
Calves	3,021	3,076	3,292	3,385	+2.8	1,709[6]	+7.5[6]	...	...
URUGUAY - Adult cattle	2,019	2,067	1,418	1,499	+5.7	1,637	+9.2	1,532	1,519
Calves	200	171	85	95	+11.8	89	-6.3	106	105
YUGOSLAVIA - Adult cattle	1,397	1,444	1,540	1,495	-2.9	...	...	...	...
Calves	1,063	840	862	891	+3.4	...	...	...	...

[1]Commercial slaughter. Represents, on average 99 per cent of total slaughter
[2]EEC(12) since 1 January 1986
[3]Inspected only
[4]January-September
[5]Total slaughter
[6]January-June
[7]Estimate

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

Country		1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast 1987	Forecast 1988
ARGENTINA	- Beef	2,426	2,294	2,428	2,565	+5.6	2,870[1]	+3.2[1]	2,510	...
	- Veal	125	90	130	175	+34.6	...	...	170	...
AUSTRALIA	- Beef	1,621	1,360	1,209	1,300	+7.5	1,383	+6.4	1,276	1,300
	- Veal	57	52	38	38	0.0	42	+10.5	43	50
AUSTRIA	- Beef	184	188	203	223[1,9]	+1.4[1]	219[1,9]	-1.8[1]	...	...
	- Veal	17	16	17	...	...	...	...	...	...
BRAZIL[1]	- Beef	2,385	2,359	2,153	2,223	+3.3	1,930	-13.2	2,200	...
	- Veal	...	...	...	...	...	...	...	...	...
BULGARIA	- Beef	34	34	34	36	+5.9	63[1,6]	-1.6[1,6]	...	...
	- Veal	95	98	99	98	-1.0	...	...	...	...
CANADA	- Beef	991	993	952	989	+3.3	990	+0.1	960	950
	- Veal	40	42	45	46	+2.2	44	-4.3	43	43
COLOMBIA[5]	- Beef	595	551	593	609	+2.7	665	+9.2	693	654
	- Veal	...	...	...	...	...	...	...	...	...
EEC[8]	- Beef	5,901	6,124	6,639	6,545	-1.4	6,820	+4.2	6,675	...
	- Veal	761	800	869	863	-0.7	940	+8.9	925	...
EGYPT[3]	- Beef	239	...	...	...	...	...	...	...	...
	- Veal	...	...	...	...	...	...	...	...	...
FINLAND	- Beef	115	118	123	125	+1.6	122	-2.4	121	119
	- Veal	1.4	0.9	0.9	0.7	-22.2	0.5	-28.0	0.0	0.0
HUNGARY	- Beef	124	138	130	131	+0.8	106	-19.1	...	...
	- Veal	0.1	0.1	0.2	0.4	+100.0	0.3[4]	0.0[4]	...	...
JAPAN	- Beef	479	492	533	554	+39.0	254[6]	+0.4[6]	564[11]	...
	- Veal	2.3	2.3	2.4	2.3	-4.2	0.9[6]	-25.0[6]	...	...

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

Country		1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast 1987	Forecast 1988
NEW ZEALAND	- Beef	509	475	445	438	-1.6	499[7]	+13.9[7]	525	504
	- Veal	20.8	18.2	14.3	14.5	+1.4	14.4[7]	-0.7[7]	14.0	13.9
NORWAY[2]	- Beef	77	72	67	70	+4.5	71	+1.4	73[1]	...
	- Veal	2.8	2.4	2.2	2.2	0.0	1.9	-13.6	...	...
POLAND	- Beef	583	559	604	645	+6.8	680[1]	0.0[1]	700[11]	...
	- Veal	56	51	46	35	-23.9	...	...	...	...
ROMANIA	- Beef	196[1]	...	234	...	...	...	...	...	...
	- Veal	...	...	...	...	...	...	...	...	...
SOUTH AFRICA	- Beef	609	628	657	639	-2.7	619	-3.1	605	725
	- Veal	3.9	4.4	4.7	4.7	0.0	4.7	0.0	5.0	5.0
SWEDEN	- Beef	151	151	144	145	+0.7	137	-5.5	132	131
	- Veal	9	9	11	12	+9.1	11	-8.3	11	12
SWITZERLAND	- Beef	122	117	128	133	+3.9	133	0.0	132	...
	- Veal	38	36	37	37	0.0	35	-5.4	35	...
TUNISIA[1]	- Beef	32.3	31.4	33.8	36.8	+8.9	40.0	+8.7	39	42
	- Veal	...	...	...	...	...	...	...	...	...
UNITED STATES	- Beef	10,223	10,543	10,250	10,763	+5.0	10,812	+0.5	...	...
	- Veal	203	206	217	226	+4.1	226	0.0	...	...
URUGUAY	- Beef	391	427	301	332	+10.3	371	+11.7	349	346
	- Veal	16	15	7	8	+14.3	9	+12.5	10	10
YUGOSLAVIA[1]	- Beef	362	357	371	352[10]	-5.1	360[10]	+2.3	370[10]	...
	- Veal	...	...	...	...	...	...	...	...	...

[1] Total production, beef and veal. Breakdown not available
[2] Production from verified or inspected slaughter
[3] Includes buffalo meat
[4] January-September
[5] Excluding production for exports
[6] January-June
[7] Estimate
[8] EEC(12) since 1 January 1986
[9] Estimates by USDA Dairy, Livestock and Poultry, World Livestock and Poultry Situation, September 1986
[10] Source: OECD
[11] Secretariat estimate

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

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast	
								1987	1988
ARGENTINA	66.0	55.0	10.0[4]	...	...	...	...	...	...
AUSTRALIA[1]	32.7	28.0	24.4	29.7	+21.7	...	...	...	...
AUSTRIA	4.0	4.0	4.0	...	...	...	...	...	...
BRAZIL	204.0	160.0	20.0	20.0	+0.0	150.0	+650.0	...	...
CANADA[2]	20.2	17.3	22.3	19.7	-11.7	23.1	+17.3	25.7	26.7
EEC[3,7]	255.0	432.0	825.0	875.0	+6.1	715.0	-18.3	400.0	...
FINLAND	7.6	5.7	5.1	5.2	+2.0	5.2[4]	+10.6[4]	...	...
HUNGARY	1.4	1.3	4.3	8.0	+6.0	5.8[6]	...	...	...

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

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast	
								1987	1988
NORWAY	6.2	6.2	3.5	3.3	-5.7	0.9[4]	-57.1[4]	...	...
SOUTH AFRICA	4.5	15.0	35.1	20.3	-42.2	0.5	-97.5	-	-
SWEDEN	6.0	9.0	14.0	8.0	-42.9	7.0	-12.5	3.0	1.0
SWITZERLAND	3.1	0.5	8.3	5.7	-31.3	6.0	+5.3	6.0	...
TUNISIA	1.8	2.6	2.1	1.5	-28.6	1.2	-20.0	...	...
UNITED STATES	121.0	136.5	151.0	146.0	-3.3	140.0	-4.1	162.0	...
URUGUAY	26.0	21.0	10.0	20.0	+100.0	10.0[5]	-50.0	10.0	10.0

[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]Stocks at the end of June

[5]Estimate

[6]Stocks at the end of September

[7]EEC(12) since 1 January 1986

Note: Stocks at the end of the year, unless otherwise specified

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

Country		1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast 1987	Forecast 1988
ARGENTINA	- Total	2,031	1,975	2,308	2,480	+7.5	2,630	+6.0	2,420	...
	- Per capita	70.0	67.0	77.0	82.0	+6.5	85.6	+4.4	77	...
AUSTRALIA	- Total	754	631	663	639	-3.6	648	+1.4	633	636
	- Per capita	49.7	41.0	42.8	40.7	-4.9	40.7	0.0	39.3	39.0
AUSTRIA	- Total	184	175	172	160	-7.0	...	...	...	...
	- Per capita	24.5	23.1	22.8	21.1	-7.5	...	...	...	...
BRAZIL	- Total	2,043	2,000	1,860	1,915	+3.0	1,122[4]	...	2,400[5]	...
	- Per capita	16.1	15.4	14.0	14.1	+0.7	8.1[4]	...	18.1[5]	...
BULGARIA	- Total	...	...	...	122[5]	...	120[5]	-1.6	...	...
	- Per capita	...	...	...	...	...	...	...	...	...
CANADA	- Total	1,039	1,039	1,039	1,031	-0.8	1,041	+1.0	1,000	1,019
	- Per capita	42.1	41.7	40.1	40.6	+1.2	41.0	+1.0	39.4	40.0
COLOMBIA	- Total	594.6	550.9	593.3	609	+2.6	664.9	+9.2	692.9	653.5
	- Per capita	21.5	19.2	20.5	20.7	+1.0	22.9	+10.6	23.6	21.9
EEC[1]	- Total	6,613	6,631	6,808	7,017	+3.1	7,600	+8.3	7,600	...
	- Per capita	24.3	24.4	25.0	25.7	+2.8	23.5	-8.6	23.5	...
FINLAND	- Total	106	104	106	99	-6.6	103	+4.0	104	104
	- Per capita	22.0	21.4	21.7	20.3	-6.5	20.9	+3.4	20.9	20.9
HUNGARY	- Total	99	89	74	89	+20.3	87[2]	-2.4	...	...
	- Per capita	9.3	8.3	7.0	8.6	+22.9	...	...	...	...
JAPAN	- Total	671	706	757	781	+3.2	366[4]	+0.5	799[5]	...
	- Per capita	5.6	5.9	6.3	6.5	+3.2	3.0[4]	0.0	...	...

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

Country		1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast 1987	Forecast 1988
NEW ZEALAND	- Total	143	136	128	118	-7.8	118	0.0	114	114
	- Per capita	44.9	42.1	39.4	36.2	-8.1	35.4	-2.2	33.7	33.4
NORWAY	- Total	76	69	72	75	+4.2	75	0.0	75[5]	...
	- Per capita	18.7	16.7	17.3	18.0	+4.0	17.9	-0.6	...	...
POLAND	- Total	519	580	585	604	+3.2	604[5]	0.0	620[5]	...
	- Per capita	14.4	15.8	15.8	16.2	+2.5	...	...	...	...
ROMANIA	- Total	...	...	...	...	...	...	...	...	...
	- Per capita	...	...	...	...	...	...	...	...	...
SOUTH AFRICA	- Total	663	664	668	683	+2.2	628	-8.1	640	670
	- Per capita	21.3	20.8	20.4	20.3	-0.5	19.6	-3.4	20.0	20.5
SWEDEN	- Total	141	141	132	136	+3.0	136	0.0	136	138
	- Per capita	16.9	16.9	15.8	16.3	+3.2	16.3	0.0	16.3	16.5
SWITZERLAND	- Total	176	169	173	183	+5.8	178	-2.7	175	...
	- Per capita	26.8	25.7	26.3	27.6	+4.9	...	...	...	...
TUNISIA	- Total	50	53	59	58	-1.7	57	-1.7	54	53
	- Per capita	6.8	7.6	8.4	8.1	-3.6	7.7	-4.9	7.2	6.8
UNITED STATES	- Total	11,093	11,416	11,523	11,734	+1.8	11,697	-0.3	11,112[5]	...
	- Per capita	48.2	48.1	49.3	48.5	-1.6	47.9	-1.2	...	...
URUGUAY	- Total	230	215	177	186	+5.1	186	0.0	186	196
	- Per capita	78.0	72.0	59.0	63.4	+7.5	63.3	-0.2	63.3	66
YUGOSLAVIA	- Total	332	325	333	316[3]	-5.1	317[3]	+0.3	320[3]	...
	- Per capita	15.2	14.8	15.0	...	...	...	...	...	...

[1] EEC(12) since 1 January 1986
[2] Preliminary
[3] **Source:** OECD
[4] January-June
[5] 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	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast	
								1987	1988
ARGENTINA	32.0	99.0	3.0	-	-100.0	-[4]	0.0	...	...
	(5.0)	(15.0)	(-)	-	(0.0)	(-)[4]	(0.0)	(...)	(...)
BRAZIL	12.0	21.0	35.0	17.0	-51.4	12.0[3]	...	...	...
	(2.3)	(3.5)	(5.9)	(6.6)	(+11.9)	(4.7)[3]	(...)	(...)	(...)
BULGARIA	-	-	-	5.0	...	0.3[2]	-72.7	...	...
CANADA	79.0	84.0	37.0	56.0	+51.4	40.0	-28.6	55.0	60.0
	(20.6)	(22.2)	(9.8)	(15.3)	(+56.1)	(11.1)	(-27.5)	(...)	(...)
COLOMBIA	-	-	-	-	...	2.4	...	...	...
EEC[6]	488.0	505.0	428.0	490.0	+14.5	460.0	-6.1	460.0	...
	(66.0)	(64.0)	(54.0)	(71.0)	+31.5	(60.0)	(-15.5)	(60.0)	(...)
EGYPT	120.7	123.1	...	...	...	...	...[5]	...	...
HUNGARY	-	16.3	68.1	40.0	-41.3	31.8[5]	-7.3[5]	...	...
	(...)	(2.4)	(10.0)	(5.4)	(-46.0)	(4.9)[5]	(+8.9)[5]	(...)	(...)
JAPAN	4.5	5.6	5.8	13.9	+139.7	15.5[2]	+210.0[2]	...	...
	(1.0)	(2.0)	(2.0)	(5.0)	(+150.0)	(6.0)[2]	+200.0[2]	(...)	(...)
ROMANIA	1.5	...	-	...	...	...	...	...	...
	(0.4)	(...)	(...)	(...)	(...)	(...)	(...)	(...)	(...)
SOUTH AFRICA	191.0	126.0	113.0	144.0	+27.4	149.0	+3.5	150.0	152.0
	(39.5)	(26.2)	(23.2)	(29.0)	(+25.0)	(30.2)	(+4.1)	(30.9)	(31.4)
SWITZERLAND	4.5	4.5	5.2	4.5	-13.5	5.0	+11.1	...	...
	(0.8)	(0.8)	(0.9)	(0.8)	(-11.1)	(1.2)	(+50.0)	(...)	(...)
TUNISIA	45.1	52.1	60.0	27.6	-54.0	16.0	-42.0	14.0	...
	(11.1)	(12.9)	(12.7)	(6.4)	(-49.6)	(4.2)	(-34.4)	(3.4)	(...)
UNITED STATES	997.0	911.0	747.0	829.0	+11.0	1,500.0	+80.9	...	...
YUGOSLAVIA	-	...	...	...	...	...	...	...	...
	(...)	(0.3)	(0.3)	(0.4)	(+33.3)	(0.6)[2]	(...)	(...)	(...)

[1] Excluding breeding
[2] January-June
[3] January-May
[4] Forecast
[5] January-September
[6] EEC(12) since 1 January 1986

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

('000 Metric Tons, Carcass Weight Equivalent)

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast 1987	Forecast 1988
ARGENTINA	14.0	5.0	-	-	0.0	-	0.0	...	...
AUSTRALIA	3.2	3.4	3.9	4.8	+23.1	1.2[1]	-60.0[1]	...	...
AUSTRIA	9.0	5.0	5.0	2.0	-60.0	0.0[1]	0.0[1]	...	...
BRAZIL	21.0	25.4	36.9	48.4	+31.2	500.0[2,6]	+933.1	350.0[2,6]	...
BULGARIA	0.2	0.1	0.1	1.4	+1,200.0	0.5[1]	0.0[1]	...	...
CANADA	77.4	79.6	106.4	103.8	-2.4	106.0	+2.1	...	...
EEC[4]	236.0	240.0	236.0	243.0	+3.0	240.0	-1.2	240.0	...
EGYPT	97.0	77.6	...	...	...	...	...	...	...
FINLAND	-	1.0	-	-	-	-	0.0	-	...
HUNGARY	14.3	11.2	7.2	3.2	-55.6	8.9[3]	...	...	...
JAPAN	175.0	196.0	207.0	215.0	+3.9	107.0[1]	+8.1[1]	...	...
NEW ZEALAND	-	-	-	0.5[5]	...	0.2[1,5]	-50.0[1,5]	...	...
NORWAY	1.1	1.3	1.7	1.8	+5.9	2.1[1]	...	2.0[2]	...
POLAND (frozen only)	6.3	1.5	14.2	4.1	-71.1	1.5	-63.4	1.5	...
ROMANIA	17.1	...	...	...	...	...	...	...	...
SOUTH AFRICA	19.6	23.0	25.1	21.6	-13.9	21.3	-1.4	23.5	24.6
SWEDEN	6.2	7.2	5.1	6.8	+33.3	6.2	-8.8	6.2	6.2
SWITZERLAND	9.2	11.5	10.6	7.0	-34.0	9.5	+35.7	...	...
TUNISIA	4.7	11.4	15.2	10.8	-28.9	10.3	-4.6	9.6	...
UNITED STATES	817.4	884.3[2]	838.0[2]	947.0[2]	+13.0	974.0[2]	+2.9	984.0[2]	...
YUGOSLAVIA	30.2	42.3	23.7	18.1	-23.6	8.9[1]	+178.1[1]	...	...

[1] January-June

[2] Includes canned and cooked beef also

[3] January-September

[4] EEC(12) since 1 January 1986

[5] Product weight

[6] Secretariat estimate

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

(Canned, Cooked, etc.)

('000 Metric Tons, Carcass Weight Equivalent)

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast	
								1987	1988
AUSTRALIA[1]	0.4	0.6	0.6	0.8	+33.3	0.2[2]	-50.0[2]	...	...
BULGARIA	0.1	0.1	0.1	-	-100.0	-[2]	0.0[2]	...	...
CANADA	11.2	12.3	10.2	12.1	+18.6	12.0	-0.8	...	...
EEC[5]	138.0	144.0	147.0	152.0	+3.4	150.0	-1.3	150.0	...
HUNGARY	0.1	1.0	0.1	0.1	0.0	-[4]	-100.0[4]	...	...
JAPAN	15.0	15.0	15.0	11.0	-26.7	5.0[2]	0.0[2]	...	...
NORWAY	-	-	-	-	...	0.1[2]	+100.0[2]	...	...
POLAND	0.7	0.5	0.2	0.2	0.0	-	-100.0	-	...
SWEDEN	0.4	0.4	0.3	0.6	+100.0	1.2	+100.0	1.0	1.0
SWITZERLAND	2.1	2.9	3.1	3.1	0.0	2.8	-9.7	...	...
UNITED STATES	87.8	...	...	...	...	...	...	...	...
URUGUAY	-	-	2.0	2.0	0.0	0.0[3]	-100.0	-	-

[1] Includes canned corned beef, canned steak and kidney
[2] January-June
[3] Estimate
[4] January-September
[5] EEC(12) since 1 January 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	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast 1987	Forecast 1988
AUSTRALIA	56.3	47.2	35.1	49.2	+40.2	70.0	+42.3	70.0	70.0
	(11.3)	(9.4)	(7.3)	(9.3)	+27.4	(14.0)	+50.5	(14.0)	(14.0)
AUSTRIA	20.0	17.0	19.0	9.0	-52.6	6.0[2]	0.0[2]	...	...
	(12.0)	(11.0)	(12.0)	(5.0)	-58.3	(4.0)[2]	(+33.3)[2]	(...)	(...)
BULGARIA	25.6	27.8	24.5	8.3	-66.1	9.1[2]	+97.8[2]	...	...
	(11.1)	(11.9)	(10.8)	(...)	(...)	(...)	(...)	(...)	(...)
CANADA	223.0	212.0	250.0	235.0	-6.0	200.0	-14.9	180.0	171.0
	(57.6)	(50.4)	(66.0)	(63.0)	(-4.5)	(54.6)	(-13.3)	(...)	(...)
COLOMBIA	0.8	-	0.7	2.1	+200.0	0.1[2]	...	...	...
	(...)	(...)	(...)	(...)	(...)	(...)	(...)	(...)	(...)
EEC[5]	342.0	398.0	367.0	275.0	-25.1	272.0	-1.1	270.0	...
	(88.0)	(103.0)	(96.0)	(72.0)	(-25.0)	(70.0)	-2.8	(70.0)	(...)
FINLAND	-	-	-	-	-	-	-	...	...
	(...)	(...)	(...)	(...)	(...)	(...)	(...)	(...)	(...)
HUNGARY	187.0	205.0	207.8	215.7	+3.8	120.0[3]	-4.7[3]	...	...
	(54.5)	(57.9)	(60.7)	(56.2)	(-7.4)	(34.0)[3]	+3.3[3]	(...)	(...)
JAPAN	0.3	-	-	0.2	-	-[2]	-100.0[2]	...	...
	(...)	(...)	(...)	(...)	(...)	(...)[2]	(...)	(...)	(...)
POLAND	230.0	304.0	290.0	229.0	-21.0	280.0	+22.3	330.0	...
	(24.2)	(33.8)	(39.1)	(34.8)	(-11.0)	(38.0)	(+9.2)	(40.0)	(...)
ROMANIA	13.5	...	...	...	...	...	...	...	...
	(3.0)	(...)	(...)	(...)	(...)	(...)	(...)	(...)	(...)
UNITED STATES	27.1	16.5	35.0	38.0	+8.6	40.0	+5.3	...	...
	(...)	(...)	(...)	(...)	(...)	(...)	(...)	(...)	(...)
URUGUAY	7.0	35.0	0.0	0.0	0.0	0.0[4]	0.0	...	...
	(1.0)	(7.0)	(...)	(...)	(...)	(...)	(...)	(...)	(...)
YUGOSLAVIA	...	...	...	...	...	...	...	...	...
	(36.2)	(29.8)	(39.3)	(41.7)	(+6.1)	(16.2)[2]	(-19.0)[2]	(...)	(...)

[1] Excluding breeding cattle
[2] January-June
[3] January-September
[4] Estimate
[5] EEC(12) since 1 January 1986

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

('000 Metric Tons, Carcass Weight Equivalent)

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast 1987	Forecast 1988
ARGENTINA	359.0	262.0	125.0	119.0	-4.8	110.0[4]	-7.6[4]	120.0	...
AUSTRALIA	898.0	726.0	575.0	653.0	+13.6	705.0	+4.6	650.0	714.0
AUSTRIA	23.0	28.0	43.0	56.0	+30.2	26.0[1]	-13.3[1]	50.0[3]	...
BRAZIL	124.6	159.9	153.3	140.0	-8.7	63.8[1]	...	...	...
BULGARIA	10.6	12.5	12.5	9.4	-24.8	5.0[1]	+400.0[1]	...	...
CANADA	79.5	79.0	101.9	113.9	+11.8	103.8	-8.9	...	...
COLOMBIA	18.2	12.6	5.2	4.0	-23.1	3.3[1]	...	28.7	29.4
EEC[5]	355.0	462.0	650.0	692.0	+6.5	805.0	+16.3	650.0	...
FINLAND	7.0	14.0	13.9	11.5	-17.3	4.5[1]	-37.5[1]	...	...
HUNGARY	48.0	43.9	50.1	55.8	+11.4	23.1[2]	-27.6[2]	...	...
NEW ZEALAND	249.0	233.0	179.0	226.3	+26.4	244.6	+8.1	246.7	251.1
NORWAY	5.0	7.2	2.0	0.5	-75.0	0.0[1]	...	...	...
POLAND (only fresh, chilled)	3.8	6.6	5.8	9.5	+63.8	4.3[1]	-15.7	11.0	11.0
ROMANIA	12.4	...	...	...	...	...	...	...	...
SOUTH AFRICA	-	1.3	1.9	2.1	+10.5	2.0	-4.8	1.0	1.0
SWEDEN	33.6	22.9	22.6	32.7	+44.7	18.0	-45.0	13.0	10.0
SWITZERLAND	0.8	0.7	0.0	1.6	...	1.0	-37.5	...	...
UNITED STATES	115.0	125.0	152.0[3]	150.6[3]	+34.5	168.0		...	...
URUGUAY	161.0	222.0	131.0	120.0	-8.4	174.0[4]	+45.0[4]	144.0	141.0
YUGOSLAVIA	43.8	36.8	37.0	50.0	+35.1	14.3[1]	-37.8[1]	...	...

[1] January-June [2] January-September [3] Secretariat estimate [4] Estimate [5] EEC(12) since 1 January 1986

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

('000 Metric Tons Carcass Weight Equivalent)

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast	
								1987	1988
ARGENTINA	163.0	153.0	125.0	141.0	+12.8	130.0	-7.8	140.0	...
AUSTRALIA	24.0	31.0	42.0	37.0	-11.9	40.0	+8.1	35.0	40.0
BRAZIL	237.2	303.6	325.4	297.6	-8.5	159.5[1]	...	...	...
CANADA	3.7	3.7	3.2	3.2	0.0	3.5	+9.4	...	...
EEC[3]	38.0	38.0	44.0	41.0	-6.8	45.0	+9.8	50.0	...
FINLAND	1.0	2.8	5.0	11.9	+138.0	6.4[1]	+20.8[1]	...	...
HUNGARY	6.4	4.1	6.3	8.0	27.0	3.6[2]	-29.4[2]	...	...
NORWAY	1.1	0.1	0.1	0.1	0.0	0.1[1]	...	...	...
POLAND	3.1	4.9	5.7	5.9	+3.5	3.1[1]	+6.9[1]	6.0	6.0
ROMANIA	4.9	...	...	...	...	...	...	...	...
SWEDEN	0.8	0.7	1.1	2.9	+163.6	2.0	-31.0	1.0	1.0
SWITZERLAND	0.5	0.4	0.4	0.7	+75.0	...	...	...	...
UNITED STATES	13.0	19.0	...	...	...	...	...	...	...
URUGUAY	8.0	10.0	13.0	14.0	+7.7	22.0	+57.1	20.0	19.0
YUGOSLAVIA	4.5	4.6	5.4	4.7	-13.0	1.1[1]	...	...	...

[1] January-June

[2] January-September

[3] EEC(12) since 1 January 1986

TABLE 12 - Beef Price - Average Price Received by Producers

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85
ARGENTINA ($a/100 kg.)	1,539.9	669.0[2]	4,324.0	23.8[6]	...	47.6[1]	...
AUSTRALIA ($A/100 kg.)	114.7	150.2	166.7	172.0	+3.2	172.0	0.0
AUSTRIA (S/100 kg.)	2,434.0	2,553.0	2,518.0	...	...	...	...
BRAZIL (Cr$/100 kg.)	1,175.1	1,586.1	1,864.5	1,518.3	-18.6	1,483.2[4,5]	...
CANADA (Can$/100 kg.)	119.0	121.1	126.7	123.0	-2.9	144.16[1]	+14.5[1]
COLOMBIA (Col$/100 kg.)	7,930.0	10,296.0	11,083.0	14,188.0	+28.0	...	...
EEC (ECU/100 kg.)	161.0	161.0	156.0	157.0	+0.7	147.8	-5.9
FINLAND (FIM/100 kg.)	1,984.0	2,130.0	2,317.0	2,456.0	+6.0	2,510.5[3]	+3.0[3]
HUNGARY (Ft/100 kg.)	4,300.0	4,400.0	4,570.0	4,570.0	0.0	4,570.0[1]	0.0[1]
JAPAN (¥/100 kg.)	46,800.0	46,300.0	44,000.0	45,700.0	+3.9	47,650.0[3]	+5.2[3]
NEW ZEALAND ($NZ/100 kg.)	125.2	131.3	163.0	182.4	+11.9	147.0[1]	-23.2[1]
NORWAY (NOK/100 kg.)	2,773.0	2,774.0	2,972.0	3,225.0	+8.5	3,369.5[3]	+8.3[3]
POLAND (Zl/100 kg.)	8,973.0	10,030.0	11,570.0	13,360.0	+15.5	...	...
SOUTH AFRICA (R/100 kg.)	211.2	215.0	226.5	239.3	+5.7	254.3[3]	+12.6[3]
SWEDEN (SEK/100 kg.)	1,908.0	1,974.0	2,027.0	1,886.0	-7.0	1,997.5[3]	+3.3[3]
SWITZERLAND (Sw F/100 kg.)	547.0	565.0	576.0	562.0	-2.4	540.0[3]	-3.6[3]
TUNISIA (D/100 kg.)	155.0	190.0	210.0	240.0[3]	...	245.0[3]	...
UNITED STATES (US$/100 kg.)	140.0	138.0	144.0	128.0	-11.5	...	...
URUGUAY (NUr$/100 kg.)	1,192.0	2,278.0	4,913.0	7,499.0	+52.6	10,054.0[3]	+3.9[3]
YUGOSLAVIA (Din/100 kg.)	11,450.0	16,876.0	23,277.0	38,558.0	+65.6	66,100.0[1]	+90.6[1]

[1] January-September
[2] New Argentinian peso since 1983
[3] January-June
[4] January-May
[5] Cruzados since 1986
[6] "Australes" as of the third quarter, 1985

Note: See notes on pages 77-78

TABLE 13 - Average Retail Price for Beef

Country	1982	198	1984	1985	% change 1985/84	1986	% change 1986/85
ARGENTINA ($a/kg.)	48.58	18.84[2]	120.05	0.79[6]	...	1.64[7]	...
AUSTRALIA ($A/kg.)	6.33	7.38	7.65	8.00	+4.6	8.27[3]	+4.9[3]
AUSTRIA (S/kg.)	141.00	148.10	155.00	...	...	...	...
BRAZIL (Cr$/kg.)	28.90	34.91	36.78	34.89	-5.1	32.33[4,5]	...
CANADA (Can$/kg.)	8.52	8.72	9.75	10.10	+3.6	9.84[3]	-2.8[3]
COLOMBIA (Col$/kg.)	79.30	102.96	110.83	141.88	+28.0	167.50[3]	+22.1[3]
EGYPT (LE/kg.)	308.80	414.90	...	...	...	...	...
FINLAND (FIM/kg.)	33.07	37.10	40.49	43.62	+7.7	44.86[3]	+4.3[3]
HUNGARY (Ft/kg.)	62.00	62.00	78.00	78.00	0.0	78.00[7]	0.0[7]
JAPAN (¥/kg.)	342.00	351.00	357.00	350.70	-1.8	351.00[3]	+0.7[3]
NEW ZEALAND ($NZ/kg.)	4.16	4.58	5.00	5.73	+14.6	4.99[7]	-14.6[7]
NORWAY (NOK/kg.)	53.90	65.09	72.83	76.44	+5.0	...	...
POLAND (Zl/kg.)	250.00	250.00	300.00	340.00	+13.3	...	...
SOUTH AFRICA (R/kg.)	5.30	5.46	5.83	6.47	+11.0	7.38[3]	+17.5[3]
SWEDEN (SEK/kg.)	59.20	67.37	82.67	85.23	+3.1	87.42[7]	+2.8[7]
SWITZERLAND (Sw F/kg.)	17.22	17.66	18.46	18.53	+0.4	17.91[3]	-2.7[3]
TUNISIA (D/kg.)	1.80	2.20	2.50	3.20[3]	...	3.20[3]	...
UNITED STATES (US$/kg.)	5.34	5.25	5.28	5.17[1]	-2.7[1]	...	...
URUGUAY (NUr$/kg.)	19.01	27.78	55.52	79.29	+42.8	141.45[7]	+83.8[7]
YUGOSLAVIA (Din/kg.)	152.00	243.00	322.00	543.00	+68.6	945.00[7]	+95.5[7]

[1] January-August
[2] New Argentinian peso since 1983
[3] January-June
[4] January-May
[5] Cruzados since 1986
[6] "Australes" as of the third quarter
[7] January-September

Note: See notes on pages 77-78

TABLE 14 - Beef Prices - Average or Representative Export Prices (f.o.b.)
- Average or Representative Import Prices (c.i.f.)(in brackets)

(US$/ton)

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85
ARGENTINA	1,391	1,312	1,273	864	-32.3	893[2]	+0.6[2]
AUSTRALIA	1,378 (2,505)	1,882 (2,647)	2,222 (2,606)	1,862 (2,121)	-16.2 (-18.6)	1,909[1] (2,352)[1]	+9.6[1] (+7.8)[1]
AUSTRIA[3]	2,490 (2,796)	2,127 (2,566)	1,739 (4,422)	... (...)	... (...)	... (...)	... (...)
BRAZIL	2,010 (1,050)	1,730 (800)	1,850 (...)	1,880 (...)	+1.7 (...)	2,030[1] (...)	... (...)
CANADA	2,081 (2,165)	1,881 (2,303)	1,882 (2,291)	1,753 (1,992)	-6.9 (-13.1)	1,841[1] (2,115)[1]	-0.1[1] (-4.3)[1]
COLOMBIA	2,990	2,987	2,390	2,845	+19.0	1,827[1]	...
EEC[4]	1,373	1,370	1,116	990	-11.3	...	...
FINLAND	... (...)	... (...)	1,120 (-)	1,040 (4,810)	-7.1 (...)	1,060[1] (...)	+8.2[1] (...)
HUNGARY	1,680 (1,206)	1,590 (1,054)	1,071 (738)	799 (735)	-25.4 (-0.4)	884[2] (...)	-0.2[2] (...)

TABLE 14 (cont'd) - Beef Prices - Average or Representative Export Prices (f.o.b.)
- Average or Representative Import Prices (c.i.f.)(in brackets)

(US$/ton)

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85
JAPAN	(3,218)	(3,249)	(3,150)	(3,140)	(-0.3)	(3,210)[1]	(+0.8)[1]
NEW ZEALAND	2,051	2,177	2,119	2,066	-2.5	1,909[1]	-4.6[1]
NORWAY	5,410 (2,920)	3,610 (2,640)	3,720 (2,870)	6,050 2,980	+62.6 (+3.8)	8,060[1] (2,170)[1]	+33.2[1] (-27.2)[1]
POLAND	1,870 (930)	1,530 (930)	1,340 (840)	980 (860)	-26.9 (+2.4)	1,195[1] (...)	+16.0[1] (...)
SWEDEN	1,480 (4,890)	1,960 (3,940)	1,610 (3,650)	1,410 (3,910)	-12.4 (+7.1)	1,315[1] (4,085)[1]	-9.6[1] (+11.6)[1]
SWITZERLAND	... (6,200)	... (6,160)	... (5,800)	1,250 (7,380)	... (+27.2)	790[1] (7,350)[1]	... (-6.1)[1]
TUNISIA[3]	(1,870)	(2,312)	(2,124)	(2,061)	(-3.0)	(2,453)	(...)
URUGUAY	1,410	1,210	1,070	979	-8.5	955[2]	-5.4[2]

[1] January-June

[2] January-September

[3] Exchange rate - source: International Financial Statistics - IMF, Vol. XXXIX, Number 12, December 1986

[4] EEC(12) since 1 January 1986

Note: See notes on pages 77-78

NOTES ON TABLES 12, 13 and 14

	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 countries of State of São 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	Average, frozen beef (including bones)	Average, frozen beef (including bones)
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
NEW ZEALAND	Annual prices are weighted averages.		...	...
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

NOTES ON TABLES 12, 13 and 14 (cont'd)

	AVERAGE PRICE RECEIVED BY PRODUCERS	AVERAGE RETAIL PRICE FOR BEEF	AVERAGE OR REP. EXPORT PRICE	AVERAGE OR REP. IMPORT PRICE
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 15 - Pigmeat Production ('000 Metric Tons, Carcass Weight Equivalent)

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast	
								1987	1988
ARGENTINA	230.0	207.0	210.0	190.0	-9.5	200.0[4]	+5.3[4]	...	...
AUSTRALIA	229.8	247.0	257.0	263.6	+2.6	266.0	+0.9	280.0	288.0
AUSTRIA	427.2	437.5	434.8	...	...	...	...	...	...
BRAZIL	520.4	559.3	477.4	387.4	-18.9	347.0[2]	...	550.0	...
BULGARIA	324.0	334.0	335.0	334.0	-0.3	163.0[1]	+14.8[1]	...	...
CANADA	832.7	8[illegible]0	862.5	900.4	+4.4	890.0	-1.2	905.0	908.0
COLOMBIA	78.6	84.6	86.5	86.9	+0.5	90.0[3]	+3.6	93.4	96.9
EEC[5]	10,075.0	10,375.0	10,458.0	10,521.0	+0.6	12,200.0	+16.0	12,300.0	...
FINLAND	180.6	177.2	170.5	171.4	+0.5	172.0	+0.4	176.0	181.0
HUNGARY	603.5	653.8	691.4	...	...	...	...	...	...

TABLE 15 (cont'd) - Pigmeat Production ('000 Metric Tons, Carcass Weight Equivalent)

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast	
								1987	1988
JAPAN	1,428.0	1,429.0	1,424.0	1,531.0	+7.5	754[1]	+4.6[1]	...	...
NEW ZEALAND	40.2	40.1	43.8	48.9	+11.6	45.9	-6.1	46	47
NORWAY	81.1	81.3	84.4	83.7	-0.8	87.2[3]	+4.2	...	...
POLAND	1,219.0	1,133.0	1,057.0	1,204.0	+13.9	...	...	...	...
SOUTH AFRICA	104.0	102.8	99.0	100.1	+1.1	98.3	-1.8	110	110
SWEDEN	325.0	318.3	323.5	332.6	+2.8	312.0	-6.2	298	295
SWITZERLAND	281.6	282.9	268.6	275.9	+2.7	280.0	+1.5	280	...
UNITED STATES	6,454.2	6,894.2	6,718.6	6,716.0	0.0	6,457.0	-3.9	6,443	...
URUGUAY	23.0	22.0	18.0	18.0	0.0	18.0	0.0	...	...
YUGOSLAVIA	786.0	772.0	876.0	833.0	-4.9	...	...	...	...

[1] January-June
[2] As at July
[3] Forecast
[4] Estimate
[5] EEC(12) since 1 January 1986

TABLE 16 - Pigmeat Consumption ('000 Metric Tons, Carcass Weight and Kg./Capita)

Country		1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast	
									1987	1988
ARGENTINA	- Total	230.0	207.0	210.0	190.0	-9.5	200.0	+5.3	...	...
	- Per capita	8.0	7.0	7.0	6.3	-10.0	6.5	-7.1	...	...
AUSTRALIA	- Total	226.5	245.5	254.5	258.9	+1.7	265.4	+2.5	276.0	284.0
	- Per capita	15.0	15.9	16.4	16.5	+0.6	16.7	+1.2	17.1	17.4
AUSTRIA	- Total	...	360.5	359.5	357.5	-0.6	...	...	...	...
	- Per capita	...	47.7	47.6	47.3	-0.6	...	...	...	...
BRAZIL	- Total[4]	517.7	557.0	471.2	382.9	-18.7	341.0	-10.9	500.0	...
	- Per capita	...	...	...	...	...	...	...	...	...
CANADA	- Total	686.6	712.9	701.2	723.2	+3.1	712.0	-1.6	733.0	736.0
	- Per capita	27.8	28.6	27.9	28.5	+2.2	27.8	-2.5	28.4	28.2
COLOMBIA	- Total	78.6	84.6	86.5	86.9	+0.5	90.0[3]	+3.6	93.4	96.9
	- Per capita	2.9	3.1	3.2	3.0	-6.3	3.2	+6.7	3.2	3.3
EEC[2]	- Total	9,990.0	10,151.0	10,206.0	10,289.0	+0.8	12,004.0	+16.7	12,060.0	...
	- Per capita	36.8	37.3	37.4	37.7	+0.6	37.2	-1.3	37.3	...
FINLAND	- Total	142.9	149.9	151.2	156.2	+1.2	159.0	+1.7	163.0	166.0
	- Per capita	29.6	30.9	31.0	31.8	+0.6	32.4	-1.8	33.0	336.0
HUNGARY	- Total	436.8	461.3	457.1	...	...	...	...	...	...
	- Per capita	40.8	43.2	42.8	42.8	0.0	...	...	...	...
JAPAN	- Total	1,629.0	1,665.0	1,708.0	1,801.0	+5.4	890.0[1]	+8.1[1]	...	...
	- Per capita	13.7	14.0	14.2	15.0	+5.6	7.3[1]	+5.8[1]	...	...

TABLE 16 (cont'd) - Pigmeat Consumption ('000 Metric Tons, Carcass Weight and Kg./Capita)

Country		1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast	
									1987	1988
NEW ZEALAND	- Total	39.0	40.7	44.5	46.4	+4.3	45.6[5]	-1.7[5]	46.0	47.0
	- Per capita	12.3	12.6	13.7	14.1	+2.9	13.7[5]	-2.8[5]	13.6	13.8
NORWAY	- Total	74.1	79.5	79.5	83.9	+5.5	85.5[3]	+7.5	...	...
	- Per capita	18.0	19.3	19.2	20.2	+5.2	20.5[3]	+1.5	...	...
POLAND	- Total	1,154.0	1,125.0	1,037.0	1,116.0	+7.6	...	...	...	...
	- Per capita	31.9	30.7	28.1	30.0	+6.8	...	...	...	...
SOUTH AFRICA	- Total	102.0	102.8	114.0	108.0	-5.3	114.0	+5.6	120.0	124.0
	- Per capita	3.3	3.6	3.5	[illegible]	-5.7	3.4	+3.0	3.4	3.4
SWEDEN	- Total	272.8	272.5	257.7	263.0	+2.1	260.0	-1.1	250.0	250.0
	- Per capita	32.8	32.7	30.9	31.5	+1.9	31.2	-1.0	30.0	30.0
SWITZERLAND	- Total	290.7	295.1	280.4	288.3	+2.8	290.0	+0.6	290.0	...
	- Per capita	44.3	45.0	42.6	43.5	+2.1	...	...	...	...
UNITED STATES	- Total	6,543.0	6,971.0	6,984.0	7,098.0	+1.6	6,792.0	-4.3	6,765.0	...
	- Per capita	28.8	30.4	30.2	27.2	-9.9	28.4	+4.4	28.0	...
URUGUAY	- Total	23.0	22.0	19.0	18.0	-5.3	18.0	0.0	...	...
	- Per capita	7.9	7.5	6.5	6.2	-4.6	6.2	0.0	...	...
YUGOSLAVIA	- Total	694.0	693.0	735.0	...	...	...	...	...	...
	- Per capita	31.7	31.6	33.1	...	...	...	...	...	...

[1] January-June
[2] EEC(12) since 1 January 1986
[3] Forecast
[4] Total apparent consumption
[5] Estimate

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

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast 1987
AUSTRALIA	-	-	0.8	0.7	-12.5	0.8	+14.3	...
AUSTRIA	0.3	1.3	1.2	0.3	...	...	...	...
BRAZIL	-	-	-	0.6	...	0.2[4]	...	...
BULGARIA	-	-	-	3.6	...	-[1]	-100.0[1]	...
CANADA	14.7	19.5	15.0	17.3	+15.3	14.0	-19.1	18.0
COLOMBIA	-	-	0.3	-	-100.0	-[1]	0.0[1]	...
EEC[2]	151.0	102.0	158.0	161.0	+1.9	157.0	-2.5	167.0
HUNGARY	-	-	-	0.5	...	8.5[1]	...	...
JAPAN	201.0	236.0	278.0	270.0	-2.9	136.0[1]	+15.3[1]	...
NEW ZEALAND	2.0	1.3	0.8[1]	...	...	...	...	...
NORWAY	2.6	2.4	2.4	4.2	+75.0	0.8[1]	...	...
POLAND	71.0	27.1	105.0	37.9	-63.9	5.1[1]	-73.0[1]	...
SOUTH AFRICA	-	-	1.0	-	-	-	0.0	...
SWEDEN	4.9	9.1	5.9	7.8	+32.2	8.0	+2.6	-
SWITZERLAND	4.5	4.7	5.7	4.9	-14.0	...	...	...
UNITED STATES	226.0	252.0	356.0	424.0	+19.1	476.0	+12.3	...
YUGOSLAVIA	...	...	3.1	6.1	+96.8	10.0[1]	...	...

[1] January-June
[2] EEC(12) since 1 January 1986
[3] January-September
[4] January-February

TABLE 18 - Pigmeat Exports ('000 Metric Tons, Carcass Weight Equivalent)

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast 1987
ARGENTINA	0.3	-	-	-	-	0.1[1]	...	...
AUSTRALIA	2.2	2.6	3.2	3.4	+6.3	3.5	+2.9	...
AUSTRIA	3.7	0.7	1.4	7.4[4]	...	...	...	...
BRAZIL	2.6	2.3	6.3	5.2	-17.5	6.3[2]	...	...
BULGARIA	-	-	-	2.0	...	1.4[1]	+600.0[1]	
CANADA	163.4	157.4	175.3	196.5	+12.1	208.0	+5.9	200.0
EEC[3]	223.0	295.0	407.0	415.0	+2.0	350.0	-15.7	400.0
FINLAND	37.5	25.3	19.9	18.3	-8.0	12/14	-34.4/-23.5	...
HUNGARY	155.3	161.5	206.4	142.9	-30.8	106.9[4]	-3.3[4]	...
NEW ZEALAND	0.3[2]	0.2	...	...	...	...	...	...
NORWAY	12.7	3.1	6.0	6.3	+5.0	0.4[1]	...	...
POLAND	63.6	79.1	88.0	99.0	+12.5	53.4[1]	+23.0[1]	...
SOUTH AFRICA	2.0	2.2	1.0	2.0	+100.0	2.1	+5.0	2.2
SWEDEN	56.5	52.7	76.2	76.4	+0.3	60.0	-21.5	...
SWITZERLAND	1.4	2.0	1.4	1.2	-14.3	...	...	...
UNITED STATES	128.0	114.0	89.0	87.0	-2.2	50.0	-42.5	...
YUGOSLAVIA	...	...	4.9	2.8	-49.9	0.6[1]	-53.8[1]	...

[1] January-June
[2] January-February
[3] EEC(12) since 1 January 1986
[4] January-September

TABLE 19 - Poultry Meat Production ('000 Metric Tons, Ready-to-Cook Basis)

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast	
								1987	1988
ARGENTINA	245.0	286.0	299.0	315.0	+5.4	350.0	+11.1	...	...
AUSTRALIA	298.0	301.6	315.0	361.6	+14.8	377.0	+4.3	397.0	419.0
AUSTRIA	70.7	75.7	81.7	...	...	...	...	...	...
BRAZIL[1]	1,068.4	1,075.8	1,049.7	1,065.4	+1.5	675.0[4]	...	1,000.0	...
BULGARIA	154.0	160.0	166.0	158.0	-4.8	75.0[2]	+4.2[2]	...	...
CANADA	527.5	527.0	558.5	610.0	+9.2	632.0	+3.6	650.0	666.0
COLOMBIA	124.9	126.1	129.3	138.5	+7.1	144.7[3]	+4.5	150.5	156.5
EEC[5]	4,397.0	4,312.0	4,330.0	4,379.0	+1.1	5,455.0	+24.6	5,520.0	...
FINLAND	16.5	18.3	19.7	20.5	+4.1	21.2	+3.4	22.0	23.0
HUNGARY	404.5	388.9	390.9	...	...	...	...	...	...
JAPAN	1,184.0	1,239.0	1,309.0	1,362.0	+4.0	677.0[2]	0.3[2]	...	...

TABLE 19 (cont'd) - Poultry Meat Production ('000 Metric Tons, Ready-to-Cook Basis)

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast	
								1987	1988
NEW ZEALAND	35.9	32.5	44.4	47.6	+7.2	48.0	+0.8	50.0	52.0
NORWAY	10.1	10.8	10.9	12.1	+11.0	6.0[2]	+5.3[2]	...	...
POLAND	183.0	185.0	249.0	269.0	+8.0	...	...	...	...
SOUTH AFRICA	429.8	457.1	479.8	487.4	+1.6	506.5	+3.9	540.0	550.0
SWEDEN	45.9	47.0	45.9	45.5	-0.9	46.0	+1.1	46.0	46.0
SWITZERLAND	24.4	24.6	25.6	25.6	0.0	26.0	+1.6	27.0	...
TUNISIA	51.9	37.5	43.0	42.0	-2.3	45.5	+8.3	49.5	53.5
UNITED STATES	7,000.6	7,151.6	7,435.4	7,865.0	+5.8	8,362.0	+9.8	8,862.0	...
URUGUAY	22.0	15.0	16.0	16.0	0.0	17.0	+6.3	...	...
YUGOSLAVIA	283.0	287.0	313.0	297.0	-5.1	...	...	...	...

[1]Federally inspected production (about 70 per cent of total production)
[2]January-June
[3]Forecast
[4]As at July
[5]EEC(12) since 1 January 1986

TABLE 20 - Poultry Meat Consumption ('000 Metric Tons, Ready-to-Cook Basis and Kg./Capita)

Country		1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast 1987	Forecast 1988
ARGENTINA	- Total	247.0	290.0	299.0	305.0	+2.0	390.0	+27.9	...	...
	- Per capita	8.6	9.9	10.0	10.0	0.0	12.6	+26.0	...	...
AUSTRALIA	- Total	295.3	300.3	313.9	360.2	+14.7	375.5	+4.2	395.0	417.0
	- Per capita	19.6	19.5	20.3	22.9	+12.8	23.6	+3.1	24.5	25.6
AUSTRIA	- Total	...	77.0	90.0	89.5	-0.6	...	...	...	...
	- Per capita	...	10.2	11.9	11.9	0.0	...	...	...	...
BRAZIL	- Total[3]	766.6	786.5	768.5	786.4	+2.3	491.8	-37.5	720.0	...
	- Per capita	...	...	...	...	...	...	...	...	...
CANADA	- Total	558.0	570.6	591.1	633.0	+7.1	663.0	+4.7	...	...
	- Per capita	22.7	22.9	23.6	25.1	+6.4	27.0	+7.6	...	...
COLOMBIA	- Total	124.9	126.1	129.3	138.5	+7.1	144.7	+4.5	...	...
	- Per capita	4.6	4.6	4.7	5.2	+10.6	5.5	+5.8	...	...
EEC[4]	- Total	3,928.0	3,992.0	4,038.0	4,140.0	+2.5	5,260.0	+27.1	5,320.0	...
	- Per capita	14.5	14.7	14.8	15.2	+7.2	16.3	+1.2	16.5	...
FINLAND	- Total	16.5	18.3	19.6	20.5	+4.6	21.2	+3.4	22.0	23.0
	- Per capita	3.4	3.8	4.0	4.2	+5.0	4.3	+2.3	4.4	4.6
HUNGARY	- Total	216.0	211.6	222.5	...	...	...	...	...	...
	- Per capita	20.2	19.8	20.9	20.8	-0.5	...	...	...	...
JAPAN	- Total	1,286.0	1,340.0	1,417.0	1,463.0	+3.2	747.0[1]	+3.9[1]	...	...
	- Per capita	10.8	11.1	11.8	12.2	+3.4	6.2[1]	+3.3[1]	...	...

TABLE 20 (cont'd) - Poultry Meat Consumption ('000 Metric Tons, Ready-to-Cook Basis and Kg./Capita)

Country		1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast 1987	Forecast 1988
NEW ZEALAND	- Total	35.9	32.5	44.4	47.6	+7.2	48.0[2]	+0.8[2]	50.0	52.0
	- Per capita	11.3	10.0	13.6	14.5	+6.6	14.4[2]	-0.7[2]	14.8	15.2
NORWAY	- Total	11.4	11.1	11.4	12.6	+10.5	13.3	+5.6	...	...
	- Per capita	2.8	2.7	2.8	3.0	+7.1	3.2	+6.7	...	...
POLAND	- Total	200.0	192.0	250.0	262.0	+4.8	...	...	...	...
	- Per capita	5.5	5.3	6.8	7.1	+4.4	...	...	...	...
SOUTH AFRICA	- Total	417.2	442.0	473.3	480.0	+1.4	500.0	+4.2	530.0	550.0
	- Per capita	13.4	13.8	14.4	15.2	+5.6	18.0	+18.4	18.0	20.0
SWEDEN	- Total	44.5	44.5	44.3	44.3	0.0	44.0	-0.7	44.0	44.0
	- Per capita	5.3	5.4	5.4	5.4	0.0	5.4	0.0	5.3	5.3
SWITZERLAND	- Total	51.6	53.4	57.2	59.7	+4.4	60.0	+0.5	62.0	...
	- Per capita	7.9	8.2	8.7	9.0	+3.4	...	...	...	...
TUNISIA	- Total	51.0	37.5	43.0	42.0	-2.3	49.5	+17.9	53.0	58.0
	- Per capita	7.6	5.5	6.1	6.1	0.0	6.7	+9.8	7.1	7.5
UNITED STATES	- Total	6,7[illegible]	6,955.0	7,233.0	7,537.0	+4.2	8,011.0	+6.3	...	...
	- Per capita	29.0	29	30.4	31.8	+4.6	33.5	+5.3	36.0	...
URUGUAY	- Total	19.0	13.0	12.0	14.0	+16.7	15.0	+7.1	...	...
	- Per capita	6.7	4.6	4.2	4.9	+16.7	5.0	+2.0	...	...
YUGOSLAVIA	- Total	265.0	280.0	284.0	...	...	...	...	...	...
	- Per capita	12.1	12.8	12.8	...	...	...	...	...	...

[1] January-June
[2] Estimate
[3] Total apparent consumption
[4] EEC(12) since 1 January 1986

TABLE 21 - Poultry Meat Imports ('000 Metric Tons, Carcass Weight Equivalent)

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast
								1987
ARGENTINA	2.2	1.5	1.5	0.3	-80.0	40.0	+13,233.3	...
AUSTRIA	8.6	10.1	10.1	..	...	...	...	...
CANADA	31.2	36.2	40.6	32.5	-20.0	41.0	+26.2	42.0
EEC[2]	64.0	59.0	75.0	85.0	+13.3	80.0	-5.9	80.0
JAPAN	103.0	101.0	104.0	100.0	-3.8	70.0[1]	+48.9[1]	...
NORWAY	0.4	0 4	0.5	0.6	+20.0	0.9[1]	...	...
POLAND	17.5	20.5	15.9	7.5	-52.8	-[1]	-100.0	...
SOUTH AFRICA	1.5	1.6	3.0	2.7	-10.0	4.0	+48.1	4.0
SWEDEN	0.3	0.4	0.4	0.7	+75.0	0.5	-28.6	...
SWITZERLAND	27.2	29.4	31.8	32.9	+3.5	...	...	...
TUNISIA	-	0.5	-	-	-	...	...	...
UNITED STATES	0.9	1.6	1.9	2.9	+52.6	...	...	...
YUGOSLAVIA	...	...	0.5	1.6	+220.0	-[1]	...	...

[1]January-June

[2]EEC(12) since 1 January 1986

TABLE 22 - Poultry Meat Exports ('000 Metric Tons, Carcass Weight Equivalent)

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast 1987
ARGENTINA	-	0.4	-	...	...	...	-	...
AUSTRALIA	2.7	1.3	1.1	1.4	+27.3	1.5	+7.1	...
AUSTRIA	1.3	0.4	0.1	...	...	...	...	...
BRAZIL	301.8	289.3	281.2	279.0	-0.8	183.2[6]	...	...
BULGARIA	-	-	-	30.3	...	11.5[1]	-0.9[1]	...
CANADA	2.9	1.9	2.2	5.1	+131.8	3.9	-23.5	4.5
EEC[3]	426.0	441.0	366.0	340.0	-7.1	290.0	-14.7	280.0
HUNGARY	178.2	185.7	162.5	155.8	-4.1	104.0[2]	-3.8[2]	...
JAPAN	3.0	2.0	2.0	3.0	+50.0	2.0[1]	0.0[2]	...
NEW ZEALAND	0.4[2]	0.4	0.2[1]	...	...	...	...	...
POLAND	13.9	13.2	14.2	14.0	-1.4	1.2[1]	-20.0[1]	...
SOUTH AFRICA	14.1	16.6	7.7	1.6	-79.2	2.0	+25.0	3.0
SWEDEN	2.4	1.7	4.7	1.4	-70.2	2.0	+42.9	...
SWITZERLAND	0.2	0.5	-	0.4	...	...	...	...
UNITED STATES	279.0	241.0	230.0	232.0	+0.9	195.0	-15.9	...
URUGUAY	3.0	2.0	4.0	2.0	-50.0	3.0[4]	+50.0[4]	2.0
YUGOSLAVIA	...	...	26.5	29.7	+12.1	5.0[1]	...	...

[1] January-June
[2] January-September
[3] EEC(12) since 1 January 1986
[4] January-November
[5] Estimate
[6] January-February

TABLE 23 - Sheepmeat Production ('000 Metric Tons, Carcass Weight Equivalent)

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast	
								1987	1988
ARGENTINA	111.0	110.0	102.0	92.0	-9.8	95.0	+3.3	...	...
AUSTRALIA	584.6	469.6	474.2	552.6	+16.5	559.5	+1.2	565.0	594.0
AUSTRIA	1.1	0.9	1.2	...	...	...	...	...	...
BRAZIL	7.1	5.0	5.2	6.0	+15.4	5.0[2]	...	5.0	...
BULGARIA	20.0	92.0	98.0	100.0	+2.0	45.0[1]	-2.2[1]	...	...
CANADA	7.9	8.7	9.2	8.5	-7.6	8.1	-4.7	8.0	8.0
EEC[4]	731.0	746.0	751.0	767.0	+2.1	920.0	+19.9	940.0	...
FINLAND	1.0	1.2	1.3	1.5	+15.0	1.6	+6.6	1.5	1.5
HUNGARY	22.5	24.8	27.2	...	...	...	...	...	...
NEW ZEALAND	642.5	665.0	686.3	681.5	-0.7	646.0[3]	-5.2[3]	612.0	595.0

TABLE 23 (cont'd) - Sheepmeat Production ('000 Metric Tons, Carcass Weight Equivalent)

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast 1987	Forecast 1988
NORWAY	20.9	20.8	22.2	22.4	+0.9	23.2	+3.6	...	...
POLAND	17.0	17.0	20.0	25.0	+25.0	...	...	...	...
SOUTH AFRICA	206.0	216.4	221.4	211.0	-4.7	178.9	-15.2	200.0	220.0
SWEDEN	5.3	5.3	4.9	5.4	+10.2	5.0	-7.4	5.0	5.0
SWITZERLAND	2.8	2.7	2.9	3.2	+10.3	3.0	-6.3	4.0	...
TUNISIA	30.0	28.4	30.3	31.7	+4.6	33.1	+4.4	35.8	37.8
UNITED STATES	165.6	170.1	171.9	162.0	-5.8	149.0	-8.0	145.0	...
URUGUAY	53.0	51.0	41.0	50.0	+22.0	68.0	+36.0	66.0	...
YUGOSLAVIA	59.0	62.0	59.0	62.0	+5.1	...	...	...	...

[1] January-June
[2] As at July
[3] Estimate
[4] EEC(12) since 1 January 1986

TABLE 24 - Sheepmeat Consumption ('000 Metric Tons, Carcass Weight Equivalent and Kg./Capita)

Country		1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast	
									1987	1988
ARGENTINA	- Total	85.0	88.0	85.0	80.0	-5.9	81.0	+1.3	...	...
	- Per capita	3.0	3.0	2.8	2.6	-7.1	2.6	0.0	...	...
AUSTRALIA	- Total	321.6	317.5	350.9	388.7	+10.8	351.2	-9.6	347.0	362.0
	- Per capita	21.2	20.6	22.6	24.7	+9.3	22.1	-10.5	21.6	22.2
AUSTRIA	- Total	1.1	0.9	1.2	...	...	...	...	...	...
	- Per capita	...	...	...	...	...	...	...	...	...
BRAZIL	- Total[3]	4.6	4.4	4.6	5.7	+23.9	5.0	-12.3	4.4	...
	- Per capita	...	...	...	...	...	...	...	...	...
CANADA	- Total	18.2	19.9	21.9	19.4	-11.4	19.0	-2.1	20.0	21.0
	- Per capita	0.7	0.8	0.9	0.8	-11.1	0.8	0.0	0.8	(0.8)
EEC[2]	- Total	975.0	965.0	960.0	976.0	+1.7	1,125.0	+15.3	1,148.0	...
	- Per capita	3.6	3.5	3.5	3.6	+2.9	3.5	-2.8	3.6	...
FINLAND	- Total	1.0	1.3	1.4	1.4	0.0	1.4	0.0	1.5	1.5
	- Per capita	0.2	0.3	0.3	0.3	0.0	0.3	0.0	0.3	0.3
HUNGARY	- Total	3.9	3.7	4.0	...	...	...	...	...	...
	- Per capita	0.4	0.3	0.4	0.4	0.0	...	...	...	...
JAPAN	- Total	170.0	165.0	150.0	159.0	6.0	87.0[1]	+13.0[1]	...	...
	- Per capita	1.4	1.4	1.2	1.3	8.3	0.7[1]	+16.7[1]	...	...
NEW ZEALAND	- Total	98.5	89.5	90.4	90.6	+0.2	96.0[4]	+6.0[4]	100.0	100.0
	- Per capita	30.8	27.8	27.7	27.6	-0.4	28.8[4]	+4.3[4]	29.6	29.3

TABLE 24 (cont'd) - Sheepmeat Consumption ('000 Metric Tons, Carcass Weight Equivalent and Kg./Capita)

Country		1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast 1987	Forecast 1988
NORWAY	- Total	22.4	23.8	23.6	24.7	+4.7	25.0	+1.2	...	...
	- Per capita	5.4	5.8	5.7	5.9	+3.5	6.0	+1.7	...	...
POLAND	- Total	17.0	17.0	21.0	38.0	+81.0	...	...	...	...
	- Per capita	0.5	0.5	0.5	1.0	+100.0	...	...	...	...
SOUTH AFRICA	- Total	208.9	220.7	226.7	248.0	+9.4	220.0	-11.3	230.0	240.0
	- Per capita	6.7	6.9	6.9	7.4	+7.2	6.0	-18.9	6.8	7.0
SWEDEN	- Total	5.3	6.1	5.8	6.2	+6.9	6.3	+1.6	6	6.5
	- Per capita	0.6	0.7	0.7	0.7	0.0	0.7	0.0	0.8	0.8
SWITZERLAND	- Total	8.7	8.4	9.2	9.5	+3.3	9.0	-5.3	10.0	...
	- Per capita	1.3	1.3	1.4	1.4	0.0	...	...	...	...
TUNISIA	- Total	31.0	33.4	34.8	32.7	-6.0	34.1	+4.3	36.8	38.1
	- Per capita	4.6	4.9	5.0	4.6	-8.0	4.6	0.0	4.9	4.9
UNITED STATES	- Total	174.2	177.3	181.9	175.1	-3.7	168.7	-3.7	...	...
	- Per capita	0.8	0.8	0.7	0.7	0.0	0.7	0.0	0.7	...
URUGUAY	- Total	39.0	39.0	36.0	43.0	+19.4	49.0	+14.0	49.0	...
	- Per capita	13.5	13.6	12.2	14.5	+18.9	16.7	+15.2	16.7	...
YUGOSLAVIA	- Total	50.0	55.0	37.0	...	...	...	...	...	...
	- Per capita	2.3	2.5	1.7	...	...	...	...	...	...

[1] January-June
[2] EEC(12) since 1 January 1986
[3] Total apparent consumption
[4] Estimate

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

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast 1987
ARGENTINA	-	-	-	0.1	...	0.1[2]	...	...
AUSTRALIA	-	1.4	4.9	4.9	0.0	0.9[1]	-65.4[1]	...
BULGARIA	-	-	-	0.4		0.4[1]	...	...
CANADA	10.5	13.8	9.8	11.7	+19.4	13.0	+11.1	14.0
EEC[3]	281.0	252.0	248.0	253.0	+2.0	242.0	-4.3	240.0
FINLAND	-	0.1	0.1	-	-100.0	-	-	-
JAPAN	170.0	165.0	150.0	159.0	+6.0	...	...	...
NORWAY	0.9	0.3	0.4	0.4	0.0	0.6[1]	...	...
POLAND	-	-	-	18.4	...	0.2[1]	-97.7[1]	...
SOUTH AFRICA	9.0	4.4	5.6	9.0	+9.4	11.0	+22.2	11.0
SWEDEN	0.7	0.8	0.7	0.8	+14.3	0.9	+12.5	...
SWITZERLAND	5.2	4.8	5.4	6.2	+14.8	...	...	...
TUNISIA	0.9	1.1	1.1	...	...	...	...	...
UNITED STATES	8.6	8.7	8.8	15.8	+79.5	...	...	...

[1] January-June

[2] January-May

[3] EEC(12) since 1 January 1986

TABLE 26 - Sheepmeat Exports ('000 Metric Tons, Carcass Weight Equivalent)

Country	1982	1983	1984	1985	% change 1985/84	1986	% change 1986/85	Forecast 1987
ARGENTINA	25.0	23.0	17.0	12.0	...	7.0[6]	...	...
AUSTRALIA	238.9	177.2	128.6	166.7	+29.6	206.3	+23.8	...
BRAZIL	2.5	0.6	0.6	0.4	-33.3	-[5]	...	...
BULGARIA	-	-	-	0.5	...	-[1]	0.0[1]	...
CANADA	0.0	0.0	0.0	0.1	...	0.1	0.0	0.1
COLOMBIA	-	-	-	0.1	+100.0	0.1[1]	...	...
EEC[3]	4.0	5.0	5.0	5.0	0.0	5.0	0.0	5.0
HUNGARY	21.0	22.5	22.5	19.7	-12.4	11.2[2]	-20.6[2]	...
NEW ZEALAND	461.6	522.3	488.6	526.5	+7.8	723.0	+16.3	614.0
POLAND	4.8	6.2	6.3	7.3	+15.9	4.1[1]	-2.4[1]	...
SOUTH AFRICA	-	-	-	0.2	...	0.2	0.0	0.3
UNITED STATES	4.8	4.2	3.6	3.4	-5.5	1.0	-70.6	...
URUGUAY	15.0	11.0	6.0	6.0	0.0	18.0[4]	+200.0	16.0
YUGOSLAVIA	...	...	6.4	5.7	-10.9	3.4[1]	-24.4[1]	...

[1] January-June
[2] January-September
[3] EEC(12) since 1 January 1985
[4] Estimate
[5] January-February
[6] January-May