Arrangement Regarding Bovine Meat

INTERNATIONAL MEAT COUNCIL

Recently Emerged and substantially expanded markets: their capacity to increase imports and their future

Note by the Secretariat

This paper has been prepared in response to the request made at the December 1981 meeting of the International Meat Council to be used as a basis for discussion at the June 1982 meeting of the IMC. The following sources inter alia have been used: FAO Production Year book, for 1975, 1977 and 1980; FAO Trade Year book, for 1975, 1977 and 1980; La Commercialisation du Bétail et de la Viande en Afrique de l'Ouest, Tome II 1980, and Tome III, 1981; various ITC studies; various information from the Australian Meat and Livestock Corporation; and national statistics.
This study covers eight countries (Republic of Korea, Kuwait, Saudi Arabia, Egypt, Libya, Algeria, Ivory Coast and Ghana). These countries have been chosen as examples of new markets for beef, some of which may have the potential of absorbing rather significant quantities of beef and others where per capita consumption of beef may become important. Whenever possible, national statistics have been used, supplemented when necessary by data from other sources, mainly the FAO. Because of sometimes wide discrepancies between different sources, figures in the paper should be viewed as indicative.
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Summary and remarks

In recent years, the countries covered by this paper* have increased their production of bovine meat on average 2.2 per cent per year (by some 18 per cent between 1973 and 1980) from 281,321 tons in 1973 to 332,100 tons in 1980, not quite keeping pace with the population growth (2.31 per cent per year or 18.5 per cent for 1973-1980). In the same period the rate of growth of the cattle herds was only 1.5 per cent per year. With increased personal income occurring in all of the countries (the increase being quite substantial in some of them), with the concern of governments to increase the animal protein intake of their populations, and the difficulties in increasing bovine meat production in those countries, (either due to lack of suitable land or other environmental constraints, or to animal diseases endemic in certain countries, or to structural deficiencies as well as to the preference of some farmers for cash crops instead of cattle breeding), these countries have had to import cattle for slaughter and bovine meat in increasing amounts in order to help meet requirements. Thus, between 1973 and 1980 imports of cattle (mainly for slaughter) increased some 47 per cent while that of bovine meat increased by some 829 per cent. In this context, it should be remembered that beef consumption only comes second to that of other meats, principally sheepmeat, in several of the countries covered, but that the popularity of beef seems to be increasing. It should also be remembered that the preference is for local beef before imported beef in most of these countries, either because of religious reasons (slaughter method), taste (= lean meat), or price considerations (imported beef generally being higher priced). It also appears that the quality requirements differ from one country to another depending on the basic purpose of the imports as well as the economic conditions of the country (for instance one country needs to increase the animal protein intake in the diet of its population while a more affluent society would like a wider choice and higher quality). Several, if not all, of the countries studied, are highly price sensitive and not only to changes within one meat but also to changes in relative price relationship between meats of different animals. Also important to remember is the emphasis put on developing poultry meat production as a substitute for other meats, and the success it has met in many of the countries covered.

The high rate of growth in imports has resulted in an appreciable, 78 per cent, increase in global beef consumption and a doubling of per capita consumption from 3.07 kgs to 6.12 kgs. Per capita consumption increased most in Libya (four times) and in Saudi Arabia (3.7 times) while it actually decreased slightly in the Ivory Coast.

*Republic of Korea, Kuwait, Saudi Arabia, Egypt, Libya, Algeria, Ivory Coast and Ghana.
The medium to long term outlook as concerns imports of beef (meat and cattle for slaughter) by these countries seems likely to be rather encouraging for exporting countries. The same factors which led these countries to import increasing amounts of beef (see above) are believed to persist for most if not all of the countries studied in the medium to long term. Several of the countries are believed to have to remain importers of beef for the foreseeable future due to practical limitations to domestic production such as lack of suitable land. However, in order for these countries to continue increasing beef imports at the present rate, or at least near to the present rate, it would seem that exporters would have to pay special attention to these markets in order to assure regular supplies, even in a situation of increased import requirements of traditional importers. The growth potential of these markets, and of others in this part of the world, appears to be greater than that of traditional importing countries. In fact, some experts believe that in the medium to long term, countries in the Near and Middle East and North Africa will constitute the second most important importing area in the world after the North American continent.
Republic of Korea

General

The Republic of Korea covers an area of 98,480 km$^2$ (approximately 18 per cent of the size of France) of which 21,960 km$^2$ is arable land (1980) and an estimated 45,000 hectares are used for permanent pasture (1979). An estimated 19,552 km$^2$ of the land is under irrigation. The population was estimated at 38,723,000 in 1981, growing at an average rate of 1.57 per cent. The farm population has decreased from 45.9 per cent of total population in 1970 to 28.4 per cent in 1980. After a severe economic recession in 1980, South Korea gave every sign of recovery in 1981 with economic growth estimated at 6-7 per cent for the year as a whole. GNP (at current prices) was estimated at US$65,000 million, up 12.9 per cent compared to year earlier, while the current account deficit narrowed appreciatively. Exports rose by 18.8 per cent while that of imports rose by 18.9 per cent. Per capita GNP (at current prices) increased by 11.1 per cent to US$1,676. According to the five year social and economic development plan* (1982-1986) GNP is to be kept to an average annual growth rate of 7.6 per cent, per capita GNP is to be raised to US$ 2,170 and inflation is to be limited to 10 per cent. On the trade side exports are targeted at US$ 53,000 million by 1986, while imports have been set at US$55,500 million.

Livestock and meat production, consumption and imports

The Government of South Korea has set as a goal self-sufficiency in beef production which it plans to achieve by increasing the national herd, and also by moving away from indigenous cattle to more productive foreign stock. According to national statistics, however, the cattle herd has been decreasing since 1978 when it counted 1,624,301 head, the highest since 1974 (1,777,711 head) reaching 1,380,000 head in 1980. The drop in cattle numbers in 1980 (-9 per cent) was the result of trying to meet demand exclusively from domestic sources. Pig numbers have been fluctuating between 1,126,000 head (1970) and 2,843,000 head (1979) in the last decade, showing a considerable decrease in 1980 on year earlier (1,761,000 head). Sheep numbers are insignificant (6,000 head in 1980) and goat numbers have been oscillating between 250,000 head (1975) and 201,000 head (1980). The number of chickens has increased considerably over the last 15 years, or from 11,893,000 head in 1965 to 39,232,000 head in 1980.

*Weekly Korean Trade News, No. 37
Production of bovine meat in the Republic of Korea has more than doubled since 1973 reaching an estimated 97,000* tons in 1980 (up from 47,517 tons in 1973). Most of the meat was produced from indigenous animals while a few tons were produced from imported live animals (especially in the period 1978-1980). Pig meat production has also shown an upward trend in the last decade from 24,980 tons in 1971 to 105,201 tons in 1979 and according to FAO sources a more than doubling of production in 1980 over year earlier to 231,000 tons. Since 1969/71 poultry meat production has also increased substantially (from 46,000* tons to 96,000* tons in 1980).

Until 1979, meat consumption in South Korea increased rather steadily as individual income and prosperity in the country rose. Beef consumption rose from 48,333 tons (1.41 kgs per capita) in 1973 to 147,097 tons (3.91 kgs per capita) in 1979, pigmeat consumption rose from 52,721 tons (1.54 kgs. per capita) to 116,100 tons (3.09 kgs per capita) while poultry meat consumption increased from an average of 46,000 tons (1.46 kgs per capita) in 1969/71 to 91,000 tons (2.42 kgs per capita) in 1979. In 1978 more than 44 per cent of the beef consumed in the country was imported whilst 39 per cent of beef consumed in 1979 was imported. Because of the economic recession, beef consumption dropped in 1980 compared to year earlier, totalling 98,955 tons (2.59 kgs per capita) most of which was produced at home. However, it would seem that pig and poultry consumption continued to increase; pig meat consumption would according to above mentioned FAO estimates have risen to 231,021 tons (6.05 kgs per capita), a figure which may be a bit inflated, and that of poultry meat increased marginally to 96,000 tons (2.51 kgs per capita) almost all of which was produced domestically. The drop in beef consumption is also in line with Government policies which tend to encourage pig and poultry consumption in preference to beef.

Notwithstanding the self-sufficiency goal aimed at by the authorities, South Korea has had to import increasing amounts of meat in order to satisfy rising demand in the last few years. Thus, imports of beef rose from 817 tons in 1973 to 57,265 tons in 1979, that of pork increased from 315 kgs to 10,899 tons, whereas mutton and lamb imports rose from 9,956 tons to 41,136 tons. Poultry meat imports increased

*FAO
as well (from 5 tons in 1973 to 39 tons in 1979, with a peak of 173 tons in 1978). Imports of all categories of meat, however, decreased dramatically in 1980 due to the difficult economic situation in Korea (beef decreased to 1,955 tons; pork to 21 tons; mutton and lamb to 12,833 tons and poultry to 19 tons). With easing economic conditions South Korea re-entered the import meat market in a more substantial way in 1981. In the first five months of the year, Korea imported 2,656 tons of beef and one source* estimated imports of beef for the year as a whole at 35,000 tons. Only 6 tons of poultry meat was imported in the same period whereas 4,336 tons of mutton and lamb but none of pork was imported.

Outlook

In view of the improved economic situation in the country, the rebuilding of the herd that has to take place after the depletion in 1980, resulting in lower domestic production, and the strong demand that apparently exists for beef, it would seem that the Republic of Korea would have to continue importing beef in the near future provided foreign exchange reserves do not decline again. In the medium term, and barring any force majeure situation, it seems likely that South Korea would remain an importer of beef, even though, in view of the Government's objectives, the growth prospects may be somewhat restricted. Taking into account population growth and production increases, it seems likely that South Korea would have problems satisfying demand solely from domestic sources, thus being forced to resort to imports, however limited.

*AMLC, 1982
Kuwait

General

Kuwait has a total land area of 17,818 km² (less than half the size of Switzerland) of which 1,000 hectares is arable land and 134,000 hectares are estimated to be permanent pastures. Irrigated land is estimated at 1,000 hectares. According to official estimates the indigenous population stood at 562,000 persons in 1980 and guestworkers living in the country were estimated at around 800,000 persons. FAO estimates that 1.7 per cent of the total active population (around 6,000 persons) were engaged in agriculture of which about half were foreign residents. Kuwait is one of the wealthiest countries in the world thanks to its enormous oil resources. The national income was estimated at 7,190.6 million dinars* in 1979 while the per capita income was estimated at 5,652 dinars (more than US$20,000) one of the highest in the world. The per capita income increased by over 53 per cent between 1975 and 1979. Kuwait's main sources of income are petroleum and petroleum products which in 1979/80 brought in a total of 3,120.5 million dinars out of total revenues of 3,241.3 million dinars. The part of agriculture in the revenues is totally insignificant. The Government has undertaken a number of projects in the country aiming at the expansion of livestocks, principally for production of dairy products and eggs but also to some extent of meat. It is believed that Kuwait may in the course of this decade become self-sufficient as concerns poultry, the main problem in that respect being the almost total reliance on imported feed for the domestic industries.

Livestock and meat production, consumption and imports

According to official Kuwaiti sources, cattle numbers have increased steadily from 3,791 head in 1974 to 5,389 head in 1979. Most of the increase was due to an increased number of cows kept for dairy purposes. Sheep and goat numbers have also increased substantially from respectively 6,863 head and 1,294 head in 1974 to 21,033 head and 1,835 head in 1979 with a peak in 1977 of 28,347 head and 2,237 head respectively, whereas poultry numbers have fluctuated rather sharply over the past several years, reaching 1,539,830 head in 1979, up from 1,470,212 head in 1974.

Local meat production is far from satisfying demand but production has been increasing steadily from about 16,500 tons** in 1974 to about 27,700 tons* in 1978 and 28,000 tons*** in 1980. Of total meat production in 1978, 3,266 tons were that of beef (compared to 2,860 tons in 1974 and around 3,000 tons** in 1980), 14,215 tons that of mutton, lamb and goat meat (compared to 6,604 tons in 1974 and 15,000 tons** in 1980) and 10,000 tons that of poultry meat (compared to 6,000 tons in 1974 and 10,000 tons** in 1980). Of the meat produced locally, only poultry meat appears to have been produced totally from indigenous animals whereas most of the other meats were produced from imported animals.

**ITC estimates based on slaughterings
***FAO
Between 1974 and 1978 apparent consumption of meats nearly doubled, up from 37,508 tons in 1974 to 73,666 tons in 1978 and according to one source* apparent consumption may have been around 87,830 tons in 1980. Total consumption of beef increased four fold (from 2,500 tons in 1973 to 10,636 tons in 1980). Per capita consumption of all meats increased from 37.5 kgs in 1974 to 65.7 kgs* in 1980 where beef consumption accounted for 2.62 kgs in 1973 and 7.8 kgs in 1980, a trebling of beef consumption in eight years. The most important meat in volume terms is that of sheep which accounted for a total of 34,744* tons (26 kgs* per capita) in 1980.

Imports of cattle have fluctuated rather sharply from one year to another whereas imports of live sheep have been on a steady upward trend with a volume in 1980 more than four times that of 1974. Live cattle imports have also increased considerably in the last several years, from 12,639 head in 1975 to 29,500** head in 1980 but with a severe drop in 1976 to only 5,831 head. Imports of live sheep increased from 373,957 head in 1974 to an estimated (FAO) 1,500,000 head in 1980. Apparently, no live poultry has been imported in recent years. Total meat imports (fresh, chilled and frozen) have increased substantially in the last several years, from 21,263 tons in 1974 to 50,790 tons in 1978 and to an estimated 62,800 tons** in 1980. According to some indications, imports in 1981 may have been even higher. Of total meat imports, that of beef and veal increased from 2,383 tons in 1974 to 7,636 tons* in 1980 and 1981 beef imports may equal or slightly surpass those of 1980. Most of the imported beef is frozen. With the considerable increases of imports of live sheep for slaughtering in recent years, Kuwaiti imports of sheep meat has tended to decrease from the peak level it reached in 1978: from 9,097 tons in 1974 sheep meat imports increased, somewhat erratically, to 17,725 tons by 1978 but has since tended to decline reaching only about 10,000 tons** in 1980 and even less according to some sources. During the same period poultry meat imports increased four fold, from 11,242 tons in 1974 to 45,000 tons** in 1980.

Outlook

Livestock and meat enters Kuwait duty and levy-free but there is a requirement for a veterinary inspection certificate. Prospects for increased imports of livestock and meat are extremely good considering the high per capita income, the low level of domestic production which does not appear to be able to satisfy requirements in the foreseeable future, and the projected increase of the population, both local and

*AMLC  **FAO
foreign. According to Kuwaiti projections, the population will increase at an annual average rate of 3 per cent reaching about 3.5 million by year 2,000. Even assuming that per capita meat consumption will remain at the 1980 level (65.7 kgs of which 7.8 kgs were beef) would mean a total meat consumption of 207,000 tons by the year 2,000, most of which would have to be imported, either in the form of live animals or of meat. This would mean that 27,300 tons of beef would be consumed, produced mainly from imported cattle or imported as fresh, chilled or frozen beef. However, if past growth trends of per capita consumption continue, it would be reasonable to expect considerably higher total consumption and correspondingly higher import requirements (of both live animals and meat) provided that regular supplies can be assured.
Saudi Arabia

General

The kingdom of Saudi Arabia comprises an area of 2,149,690 km$^2$ (approximately a fourth of the size of the United States) of which 10,400 km$^2$ is estimated to be arable land with 395,000 hectares irrigated. Pasture land is estimated at 250,000 km$^2$. Population figures vary according to source but the FAO estimated the indigenous population at 8,367,000 in 1980. Of the active indigenous population, 28 per cent was engaged in agriculture in 1980, compared to 41 per cent in 1976. The Saudi economy has known a tremendous development in the last twelve to fifteen years with an average annual growth rate of 12.8 per cent between 1968 and 1974. The gross domestic product increased from 14,773 billion riyals* in 1968 to an estimated GDP of 125,1 billion riyals in 1980/81. The per capita income has increased in the same strong manner from 3,185 riyals in 1970 to 23,980 riyals in 1975 and it has been estimated at more than US$11,000 in 1980. The main source of income is petroleum and petroleum products, agriculture only constituting less than one per cent. In view of the limited existence of arable land, it is believed that agriculture will remain a very modest part of the Saudi GDP in the foreseeable future.

Livestock and meat production, consumption and imports

According to official Saudi Arabian estimates, most categories of livestock population in the country have steadily increased over the last several years. In 1977/78 the cattle herd stood at 352,699 head compared to 281,753 head in 1974/75 and according to FAO estimates the herd may have reached 400,000 head in 1980. Sheep and goat numbers also increased from 2,147,850 head and 1,242,216 head respectively in 1974/75 to 2,699,182 head and 2,077,535 head respectively in 1977/78. By 1980 sheep numbers were estimated to have reached 4 million head while goat numbers were estimated to have declined to 1,974,000 head. As regards chickens the figures vary according to source, FAO figures suggesting a considerable increase in the last decade from 3 million head in 1969/71 to 5.5 million in 1980.

Production has also increased for most categories of meat. Bovine meat production (cow beef) increased from 7,000 tons** in 1973 to around 10,000 tons*** in 1980, the major part of which was produced from imported animals. Mutton and lamb production almost doubled in the same period, from 12,976 tons** in 1974 to 25,319 tons** in 1979, of which 9,852 tons** and 23,831 tons** respectively were produced from imported animals. However, in spite of increases in the national herd, goat meat production almost halved in the period considered, although with an increased amount of meat being produced from imported animals (from 8,455 tons** in 1974 to 4,902 tons** in 1979). In line with government policy, poultry meat production increased significantly, more than quadrupling between 1969 and 1980, (from 7,000 tons*** to 30,000 tons***).

*1,000 riyals = US$ 300.600 (1980)
**Estimated on basis of slaughter
***FAO
It is interesting to note the increase in beef consumption that has taken place in Saudi Arabia in the last several years (from 13,398 tons in 1973 to 49,781 tons in 1980 and it is believed that consumption figures for 1981 are higher still). No official figures for per capita consumption are available but on the basis of FAO population estimates a rough calculation would give a per capita consumption of beef of little more than one kg and a half in 1973 but which by 1980 had risen to almost 6 kgs, already more than what had been projected by FAO for 1985. The most spectacular increase in consumption of other meats is that of poultry which has risen from some 2.5 kgs* in 1973 to almost 27 kgs* in 1980.

Saudi Arabia's imports of live animals have shown an upward trend in the past several years. Imports of cattle have more than doubled since 1973 (from 52,355** head to 125,744 head in 1980), sheep numbers have increased more than four times since 1975 (from 956,292 head to 4,162,011 head), and poultry numbers almost doubled (from 2,350,597 head to 5,630,104 head). For 1981 indications are that sheep and chicken imports will have reached record levels. The domestic production of meat is far from sufficient to satisfy the ever increasing demand from a population whose income is increasing at a rate unknown in most other countries in the world. Therefore, meat imports have also increased many fold in the last several years. Chilled and frozen beef and veal imports have risen from 1,803 tons in 1975 (6,398 tons in 1973) to 39,781 tons in 1980 and in the first three quarters of 1981 they were already at 32,898 tons, suggesting imports for the year as a whole at least equal to those of 1980. Chilled and frozen mutton and lamb and goat meat imports have also risen substantially (from 1,026 tons** in 1973 to 24,088 tons** in 1980), although not as much as that of beef, a fact easily explained by the much higher domestic production of those meats. Although mutton and lamb are the preferred meats by the Saudis followed by beef, there is a strong competition from poultry as it is much cheaper both to produce and at the retail level, a significant factor especially for the poorer sections of the population. The total availabilities of poultry on the market by far outstrips that of any other meat, domestic production having increased considerably as well as imports (from 36,542 tons in 1975 to 193,338 tons in 1980). It is possible, however, that imports of poultry are slowing down somewhat as only 117,627 tons were imported in the first three quarters of 1981, making it questionable that the record level of 1980 will be surpassed in 1981.

*Estimates based on FAO production and import figures  
**FAO
Outlook

The Saudi Arabian market is almost free from impediments to imports, although an import licence is needed and in recent years health and veterinary regulations have become more stringent. The Saudi Arabian importers are willing to import meat from any country provided the quality and price is right. It is likely that the country will not be able to reach any degree of self-sufficiency as concerns meat and meat products, except perhaps for poultry production, in the foreseeable future. This factor, together with the increasing demand from the population, the government's concern of increasing the animal protein intake, and the expanding economy, makes it quasi certain, barring any force majeure situations, that Saudi Arabia will be in the market for beef permanently, importing ever increasing amounts of beef but also of live animals for slaughter. The price of the products seems to be of relatively less importance than quality and regular supplies. Thus, even if there were price increases of some magnitude, it would seem likely that Saudi Arabia would remain an importer of at least of around 30,000-40,000 tons of beef annually and possibly more in the not too distant future.
Egypt

General

The Arab Republic of Egypt extends over a total area of 1,001,450 km² (slightly less than the area of France and Spain together) of which 995,450 is land, 28,480 km² is estimated to be arable and permanent crop land, all of which is estimated to be irrigated. The population was estimated in 1980 at 41,995,000 persons; slightly more than half of the active population were engaged in agriculture compared to 54.4 per cent in 1970. Egypt continues to enjoy a real economic growth rate of around 8 per cent together with a balance of payments surplus. The GNP amounted to 13.26 billion Egyptian pounds* in 1979 while per capita income stood at 324 Egyptian pounds. The main sources of income for Egypt are oil and oil products, the Suez Canal, workers' remittances and tourism. Out of total export earnings of 3.853 billion Egyptian pounds in 1980, 60 per cent were from oil and oil products. Agriculture products, mostly fruits and vegetables, accounted for around 235 million Egyptian pounds (an increase of 30 per cent on year before). Much effort and funds are being spent on modernizing the agricultural sector. The efforts have resulted in an average 4 per cent a year increase in productivity in the last three years - compared to a population growth of 2.9 per cent - which is, however, far from enough considering a rise in consumption of 7 per cent per year. In this context it should be noted that Egypt is today importing half of its food requirements and this proportion is likely to be rising in the next few years.

Livestock population, meat production, consumption and imports

Cattle numbers in Egypt were estimated at 2,040 million** head in 1980, down somewhat from 2,128 million head in 1973. The cattle herd is kept primarily for milk production and it has been estimated that 80 per cent of the dairy herd is scattered over a million small holdings. The numbers of buffalo in the country has increased from 2,135,000 head** in 1968 to 2,379,000** head in 1980. This increase is explained inter alia by the conviction that buffalo are particularly well suited to the domestic conditions and needs and also because they have a potential of comparatively high return. Sheep numbers have been declining from 1,994 million head** in 1973 to 1,692 million head** in 1980, while that of goats has risen in the same period by some 436,000 head to 1,700,000 head**. Poultry numbers also increased, from 25,458,000 head** in 1973 to 27,475,000 head** in 1980, an increase which is much due to a number of joint-venture projects initiated in recent years.

Egyptian production of meat has been increasing relatively slowly. The figures vary according to sources but the FAO figures suggest a growth in total meat output from 375,000 tons in 1973 to 435,000 tons in 1980 (an average increase of 2.0 per cent a year). Beef and veal production has shown very little growth in the last decade or from 123,000 tons** in 1973 to 124,000 tons** in 1980. Production growth of buffalo meat was slightly more pronounced (from 103,000 tons** in 1969/71 to 119,000 tons** in 1980) while mutton and lamb production

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*1 Egyptian pound = US$ 1.429 (1979 and 1980)
**FAO
decreased somewhat (from 28,000 tons* in 1973 to 25,000* tons in 1980). Poultry meat production increased by 22,000 tons or from 80,000 tons* in 1973 to 102,000 tons* in 1980**. Egypt is also producing a small amount of pigmeat (3,000 tons in 1980).

Calculations made on the basis of FAO estimates of production and imports suggest that total consumption of meat in Egypt increased from 386,728 tons (10.8 kgs. per capita) in 1973 to 577,132 tons (13.7 kgs) in 1980. The preferred meat seems to be that of bovine animals (beef and buffalo meat), total consumption of which has increased some 77,000 tons since 1973 to 308,527 tons in 1980. Beef consumption increased from 128,933 tons to 189,152 tons in the same period (3.85 kgs and 4.50 kgs per capita respectively). Poultry meat consumption has shown the most rapid increase from 2.30 kgs in 1973 to 3.72 kgs in 1980 (may be higher according to incomplete official Egyptian figures). Mutton and lamb consumption has decreased somewhat in the same period (from 870 grams to 800 grams).

Imports of cattle have fluctuated considerably over the years with no cattle imports in 1968, 45,250 head in 1973, 4 head in 1976, 671 head in 1979 and 17,000 head in 1980*. No imports of sheep/goats were reported in 1978/80 while imports stood at 60,529 head in 1975 and 19,465 head in 1976*. (Apparently, Egypt exported an increasing number of sheep and goats in 1978, 1979 and 1980 (93,103 head, 121,153 head and 179,045 head respectively*).) Meat imports have registered a somewhat more regular uptrend where the most important increase has been seen in imports of beef and veal and buffalo meat or from 1,776 tons* in 1968 to 65,152 tons* in 1980. It has been estimated (AMLC) that beef imports were at 95,000 tons in 1981 and that they will possibly reach 115,000 tons by 1985 and 140,000 tons by 1990. The second highest import volume is represented by that of poultry meat which has increased from 2,415 tons in 1973 to 54,333 tons in 1980 and which in 1981 is estimated to have reached 86,000 tons. Total red meat imports in 1981 have been estimated at 120,000 tons, up more than 30 per cent on year before (90,799 tons).

Outlook

The bulk of meat is imported by a government controlled agency on the basis of official tenders, although the proportion of private sector imports is reportedly increasing. No quantitative restrictions, nor tariffs or levies exist as a rule on imports of live animals and meat, except as concerns canned sausages (65 per cent). The Egyptian population growth rate has been estimated at 3 per cent per year, meaning a population of 65 to 70 million by year 2000. Arable land available today is all cultivated and in order to increase crops, productivity would have to be increased further and/or more land has to be put into cultivation at high cost (land reclamation projects are constantly under consideration). Even under the best of circumstances it is doubtful whether Egypt would be able to feed its growing population without massive importation, especially of meat, in the foreseeable future. In order to increase the per capita intake of meat and meat products, the Government subsidizes meat retail prices heavily.

*FAO
**Ministry of Agriculture data indicate a production of 160,000 tons in 1977.
as well as other food items (in fiscal year 1980/81 consumer subsidies on food amounted to some US$ 3,000 million, of which 8 per cent went to meat). Subsidized meat is sold in special government shops and meat is rationed. Also, because of shortages, meat has been available only on certain days of the week.* In addition to the Government sponsored shops, there are private sector shops with free prices, often 2-3 times the price of the subsidized meat. In view of the above, it would seem likely that Egypt will remain a net importer of beef in the foreseeable future and that quantities will possibly increase at least in step with population growth, i.e. by 3 per cent per year and maybe more. However, it would seem that the Egyptian market is a rather price-sensitive one, dependent on offers of lower quality beef at reasonable prices. Therefore, a strong increase in prices may result in a slower increase of the volume of beef imported and maybe also in a more erratic import pattern. At the "right" prices and with reasonably regular deliveries, it would seem that the Egyptian market with its rapidly rising population (with a preference for beef) could become a major importer in the medium to long term.

*There are proposals for a reform of the subsidy programme. If the subsidy programme is reduced, the imports of beef may well be affected.
Libya

General

The Socialist People's Libyan Arab Jamahiriya has a total land area of 1759,340 km² (approximately the same area as that of Finland, France, the Federal Republic of Germany, Italy and Poland together) of which, in 1979, 25,640 km² and 67,000 km² respectively was estimated by FAO to be arable and permanent crop land, and permanent pasture land respectively, representing together around 5.2 per cent of the total land area. 3,000 hectares were estimated to be irrigated. The Government has allocated a good portion of the budget to development of agriculture in the country (for instance the Development Plan for 1976-1980 provided for US$4,988 million out of a total of US$31,265 million) with the aim of reaching self-sufficiency in agriculture products as soon as possible. The population was in 1980 estimated by FAO at 2,977,000 persons with 15.7 per cent of the active population occupied in agriculture, down from 32 per cent ten years before. Of total population, some 300,000 to 500,000 are foreign nationals working in the country. The national income of the country has increased tremendously over the last two decades, due mainly to oil revenues, from 131 million dinars* in 1962 to 4867.9 million dinars in 1978. Per capita income is estimated to have risen from 665 dinars in 1970 to 1,833 dinars in 1977.

Livestock population, meat production, consumption and imports

The official estimates of livestock numbers show a steady increase in spite of occasional big losses due to drought conditions, as for instance in 1974. In that year, cattle numbers stood at 120,070 head, while sheep numbers totalled 2,855,323 head, goats 1,147,095 head and poultry 3,429,217 head. By 1978 all categories of livestock registered gains, some quite substantial (cattle numbered 183,300 head, sheep 3,982,400 head, goats 1,616,800 head and poultry 4,556,700 head). According to FAO, cattle numbers decreased again somewhat in the two following years, reaching 180,000 head in 1980. In view of the limited pasture availabilities and other environmental hazards such as lack of regular watersupplies, it does not seem likely that the livestock population, except poultry, will increase very much in the foreseeable future.

According to FAO estimates, beef and veal production in Libya has increased more than six fold in the last decade, from an average of 5,000 tons in 1968/71 to 33,000 tons in 1980. (Incomplete national statistics suggest, however, that this increase may have been somewhat smaller or at least have occurred some years later, than indicated.) Production of mutton and lamb has also increased considerably in recent years according to FAO figures, from an average of 23,000 tons in 1969/71 to 51,000 tons in 1980 while poultry meat production is estimated to have shown the most substantial increase, from 2,000 tons in 1969/71 to 26,000 tons in 1980.

Recent official consumption figures are not available but it has been estimated by various sources that total meat consumption has increased from 19 kg per capita in 1966 to 32 kgs in 1975 and that it may have reached 40 kgs by 1979. Taking into consideration local production plus imports, beef consumption would be in the order of 16.5 kgs per capita in 1980, up from around 4.0 kgs in 1973. Thus, compared to other countries in the region, the Libyans are not unsubstantial consumers of meat, with a rapid rate of increase in beef consumption, a rate that has been estimated at 10.5 per cent per annum. This increase in meat consumption is on the one hand attributable to the progression in per capita income and on the other the government's control of prices which keep the retail prices of meat (by way of subsidies) at reasonable levels for the population. Libyans prefer locally produced meat, firstly mutton and lamb and camel meat and then beef. The increased beef consumption (and coincidentally poultry consumption) appears to be related, essentially, to increased revenues and to the presence of guestworkers in the country.

According to Libya's Foreign Trade Statistics, imports of cattle have risen substantially in the last decade, from 6,360 head in 1973 to 178,739 head in 1979. According to certain sources this trend continued in 1980 and 1981 (according to FAO 192,000 head were imported in 1980) and appears likely to continue in the short to medium term in view of the shortage of both cattle and meat in the country. Imports of sheep have also increased considerably in spite of rather sharp fluctuations. Thus from an import level of 847,192 head in 1973, sheep imports rose to 1,797,906 head in 1979 and it is believed that Libya will continue in the short to medium term to require vast amounts of live sheep both for breeding purposes and for slaughtering. Imports of fresh chilled and frozen beef and veal more than trebled between 1972 and 1980 (from 2,098 tons to 16,200 tons) but fluctuated greatly from one year to another (for instance in 1975 imports of beef reached a peak of 14,022,120 kgs, only to decline in the following years reaching 5,528,000 kgs. in 1977, the lowest level since 1972). Imports of mutton, lamb and goat meat also appears to have been fluctuating between 475 tons in 1972 and a record volume of 2,645 tons in 1976. In 1979 imports were quite substantially lower (662,881 kgs) than in 1976 but according to FAO estimates sheep meat imports were up again in 1980 (at 1,100,000 kgs). These fluctuations in meat import volumes seem to be explained, at least partly, by the variations in imports of live animals, i.e in a year when a great many animals are being imported less meat is needed. In 1977, a low level of beef imports was reported but a rather high one of cattle. It is also reported that the Libyans prefer imports of animals for slaughter than of meat, partly for cost reasons but also for reasons of ensuring the slaughtering method.
Outlook

All imports of live animals and meat are made by a government agency. There are strict veterinary and sanitary rules for meat imports as well as a small tax (1 per cent in 1980). Preference is given to exporters which are able to offer fixed price contracts for periods of up to six months or a year. In view of the environmental difficulties confronting the livestock sector, it would seem that Libya could remain an importer of cattle and beef for some years to come. According to FAO projections and considering the population growth, Libya could be importing some 50,000 to 59,000 tons of meat in 1988 (compared to 15,342 tons in 1975 and 7,961 tons in 1979). Of this total, between 17,000 and 21,000 tons would be that of beef. Libyan sources project consumption for 1985 at 103,000 tons, and since about half that volume was produced domestically in 1978, it could reasonably be expected that around 70,000 tons of meat may be locally produced in 1985. This would leave around 30,000 tons to be imported, a third to a half of which might be that of beef.
Algeria

General

With its 2,381,741 km\(^2\) (slightly less than half the area of Europe) Algeria is the second biggest country of the African continent. Of the total area, 6,846,000 hectares consist of arable land, 651,000 hectares of permanent crop land and 36,323,000 hectares of permanent pasture (1980). 336,000 hectares were estimated to be irrigated (1979).* The population of Algeria is increasing at an annual rate of 3.2 per cent and was estimated at 18,956,240 persons at the beginning of 1981. According to the 1977 census, 29.6 per cent of the active population was engaged in the agricultural sector. Algeria's GDP was growing by an annual average rate of 6.2 per cent in real terms in the period 1970-76 (according to World Bank estimates). By 1977 GDP was estimated at 70,000 million dinars and in 1979 it was believed it had reached more than 120,000 million dinars. Of total GDP in 1979 agriculture accounted for 7.5 per cent compared to 21 per cent in 1960. Per capita income was estimated at around 5,700 dinars in 1979. The national revenue was 68,305 million dinars in 1981 (compared to 32,340 million dinars in 1973) of which 46,180 million were derived from petroleum and petroleum products. The 1980-1984 five year plan projects an annual GDP growth rate of 8.2 per cent and a per capita GDP of 7,500 dinars by 1984. The Plan also provides an almost doubling of investment in agriculture to 20,000 million dinars (5 per cent of total investment compared to 11 per cent under the previous plan).

Livestock population, meat production, consumption and imports

The agrarian reform programme started its third phase in 1980 and aims at increasing livestock production but even before that Algeria's cattle numbers had been showing a steadily increasing trend from 910,000 head in 1973/74, reaching 1,355,000 head in 1979/80. Sheep numbers increased substantially in the same period (from 8,687,000 head in 1973/74 to 13,370,000 head in 1979/80) while goat numbers increased from 2,545,000 head to 2,723,000 head. Poultry numbers are believed* to have risen by some 4.2 million head to 18,000,000 head.

The number of animals slaughtered has increased but bovine meat production has increased more slowly due to falling average carcass weights. Thus, in 1973, it was estimated that production of bovine meat reached 43,877 tons and that by 1980 it had increased to 48,000 tons*. Sheep meat production in the same period rose from 47,324 tons to 56,000 tons*, that of goat meat from 9,930 tons to 11,000 tons* while poultry meat production showed the biggest increase (from 28,000 tons* to 46,000 tons*). It is believed that Algeria will be virtually self-sufficient in poultry meat by 1985.

*FAO

Note: exchange rate May 1981
1 US$ = 4.19 dinars
100 Algerian dinars = US$ 23.88
The apparent meat consumption in Algeria in the last four years (1975-1980) has according to estimates increased by some 44 per cent, totalling 168,811 tons in 1980. The consumption of mutton and lamb, the preferred meats, increased from 31,534 tons (1.96 kgs per capita) in 1975 to 58,000 tons (3.15 kgs per capita) in 1980, most of which was produced domestically from indigenous animals. Beef and veal consumption has also increased quite substantially, from 46,117 tons (2.87 kgs per capita) in 1975 to 63,000 tons (3.42 kgs per capita) in 1980. This increase is mostly due to the rise in imports. Poultry consumption seems to have been fairly stable in the last few years rising from 42,000 tons* (2.43 kgs per capita) in 1978 to 46,200 tons* (2.57 kgs per capita) in 1980. All of the poultry consumed (except for 200 tons in 1980) appears to be produced domestically.

Although fluctuating somewhat, Algerian imports of meat have risen many fold since 1975, when they amounted to 144 tons*, reaching 18,800 tons* in 1980, and it was believed that they would more than double in 1981, to around 50,000 tons**. So far, most of the meat imported has been that of bovine animals, often of manufacturing quality. From 97 tons* in 1975 imports of beef increased to 15,000 tons* in 1980 and possibly still higher in 1981 if the figure of 50,000 for total meat imports is verified. Mutton and lamb imports are still comparatively low (Algeria was an exporter of mutton and lamb until the beginning of the 1970's) rising from 1,668 tons* in 1977 to 2,000 tons* in 1980 and probably more in 1981. Imports of poultry meat appears to be non-existent until 1980 when 200 tons* were reported imported. Algeria also imports some live cattle and sheep, some of which are for breeding. The number of heads of cattle imported have been decreasing from year to year, from 5,755 head* of cattle in 1975 while in 1980 only 1,900 head* were imported. Sheep numbers imported have been fluctuating with none imported in 1975 but 2,000 head* in 1980.

Outlook

Imports of meat into Algeria are controlled by the government and carried out by a public organism. A veterinary certificate is necessary and there are a variety of taxes to be paid on imports, the aggregate of which sometimes doubles the importing price. The goal of Algeria is to become self-sufficient in both industrial and agricultural production. With a population rising at an annual rate of 3.2 per cent, agricultural producers more interested in cash crops, with prices for meat controlled (indirectly by way of intervention) by the government at fairly low levels, thus discouraging the producer, and increasing demand for meat from a population with increasing income available for meat purchases, it appears unlikely that the domestic meat production will be able to satisfy requirements in the short to medium term. It would therefore seem that, provided domestic production continues to increase at the rather slow pace of the past few years, 10 to 30 per cent of total demand would have to be fulfilled by imports in the short and medium term. For beef it would seem that the proportion may be between 25 and 40 per cent, meaning imports of approximately 15,000 tons to 25,000 tons annually.

*FAO
**AMLC: Market Notes, No 308
Ivory Coast

General

Ivory Coast, on the west coast of Africa, occupies an area of 322,463 km² (approximately the size of Norway) of which 27,200 km² are estimated to be arable, 113,000 hectares permanent crop land and around 3,000 hectares permanent pasture land. Land under irrigation is estimated at 25,000 hectares. The population was estimated at 7,973,000 persons in 1980, the average growth rate of which is high (3.8 per cent). Of total active population, it is estimated that 79.3 per cent are occupied in agriculture. It is also estimated that around 25 per cent of the population are foreign residents, there as guestworkers and technical experts. The economy of the Ivory Coast is to a large extent dependant on agriculture, the country being one of the major producers of such products as coffee, cocoa, pineapples and bananas. Traditionally, however, livestock breeding and meat production have been and still are, of minor importance for the economy. Due to many endemic animal diseases present in the country (such as sleeping sickness and trypanosomiasis) and the humid climate in part of the country, the Ivory Coast has a comparative advantage in the production of crops for export, using the income thus obtained for imports of inter alia live animals and meat, rather than producing itself at great cost all the necessary quantities. The GDP of the Ivory Coast has increased at an average rate of over 12 per cent annually since 1960 (but in real terms the increase has been 8 per cent), from 142,600 million francs CFA* to 1,740,600 million francs CFA in 1978. It is possible, however, that since then the rate of growth has slowed down considerably due to financial constraints, resulting in a slowing down of investment and a growing foreign debt. The main contributory factor to the growth in Ivory Coast's economy has been exports which have increased at an annual rate of 12 per cent since 1960, (9 per cent in real terms) resulting in a trade balance which has always been in surplus in spite of big increases in imports. The average per capita income in the country is largely ahead of that of neighbouring countries, averaging about US$540 in 1975, a figure that is higher today as individual income growth has followed, but not paralleled, that of the economy in general.

Livestock population, meat production, consumption and imports

Livestock numbers in the Ivory Coast have risen considerably in the past decade; in general, the rate of increase has been higher than that of the population. Cattle numbers increased from 460,000 head in 1973 to 670,000 head in 1980, pig numbers increased from 150,000 head to 340,000 head, that of sheep from 920,000 head to 1,200,000 head, goat numbers from 924,000 head to 1,250,000 head and poultry numbers from 6,200,000 head to 12,500,000 head**. It is believed that most of the country's cattle owners consider the cattle as a means of saving and

*1000 francs CFA = US$4.61  
1 US$ = 219.9 francs CFA  
(CFA = Communauté financière africaine)  
**FAO
also as a means of acquitting themselves of certain social obligations (e.g. slaughter for marriages and funerals) rather than a commercial enterprise.

The meat production figures seem to corroborate this theory: according to the figures available, increases in meat production between 1973 and 1980 were slight and even non existent for bovine meat. Total meat production (excluding game) amounted to 119,000 tons in 1980, up from 93,000 tons in 1973, of which 41,000 tons were that of beef and veal (1980) down slightly from 42,000 tons in 1973 (35,000 tons in 1975 and 1978, however), and 24,000 tons of poultry meat, up from 10,000 tons in 1973*. Like poultry meat production, pig meat production also more than doubled in the period, (from 5,000 tons to 13,000 tons) whereas sheep and goatmeat production decreased slightly (from 14,000 tons to 13,000 tons)*. The production figures become even more eloquent when cattle imported for slaughter is taken into account, as approximately 34,000 tons out of 42,000 tons in 1973 were produced from imported animals and 29,000 tons out of 41,000 tons in 1980*.

Total consumption** of fresh, chilled and frozen meat in the Ivory Coast increased some 38 per cent between 1973 and 1980 (from 94,175 tons to 129,950 tons) while per capita consumption** changed very little (from 15.33 kgs to 15.58 kgs per capita). Thus, while global consumption of most meats increased (beef increased from 42,992 tons to 51,000 tons; pork consumption rose by 8,000 tons to 13,000 tons; and poultry consumption increased from 10,122 tons to 24,300 tons while sheepmeat and goatmeat consumption decreased somewhat from 14,000 tons in 1973 to 13,500 tons in 1980), per capita consumption remained fairly stable or declined slightly as in the case of beef (from 6.99 kgs in 1973 to 6.27 kgs in 1980) or sheep and goatmeat (from 2.27 kgs to 1.66 kgs). Added to the meat consumption should also be that of game which is estimated at around 2 kgs per person. From the above it can be seen that the inhabitants of the Ivory Coast appear to prefer beef before any other meats. It is important to note, however, that meat as an animal protein source only comes second to that of fish: whereas per capita consumption of meat has remained fairly stable in the last decade (or in the case of beef actually declined somewhat), the consumption of fish has increased significantly (from 18.6 kgs in 1970 it rose to 26.6 kgs in 1978, an increase of 42 per cent). The increase in fish consumption appears to be due to a significant increase in imports of frozen fish and to the considerable difference in price between fish and meat (the average retail price on the local market in Abidjan in 1979 was 667 francs CFA per kg of bovine meat, 878 francs CFA per kg of mutton and 418 francs CFA per kg of fresh fish). Imported beef is several times as expensive as both local beef and fish and imported fish. Also, it appears that the consumer is fairly price sensitive and fairly easily substitutes one meat for another less expensive or for fish which is always less expensive.

*FAO
**Calculated on the basis of FAO production and import figures
According to FAO estimates, substantial quantities of live animals for slaughter are imported by the Ivory Coast, although since 1973 the numbers have decreased, in part as a consequence of the drought in the countries of origin (Upper Volta, Mali, Niger). Both imports of cattle and sheep have decreased, cattle from 250,000 head in 1973 to 215,000 head in 1980 while sheep imports almost halved in the same period from 930,000 head to 580,000 head. Because of the decreases of livestock available for imports, in particular in the mid-seventies, it was decided to resort to increased imports of meat, in particular of beef, imports of which rose rapidly from 992 tons in 1973 to 17,903 tons in 1978, declining again, however, when imports of live cattle started to pick up again in 1979, reaching an estimated 10,000 tons in 1980. Imports of other meats are modest, the most significant ones being that of canned and preserved meats which are estimated to have reached 2,110 tons in 1980.

Outlook

Three factors appear to have been influencing the global meat demand in the Ivory Coast, namely the rapid population growth, the increasing urbanisation, and the rise in real per capita income. It would appear likely that the first two factors will continue to be present for some time to come while the third for the time being is uncertain and seems in fact to be stagnating in real terms. Considering that despite efforts by the Government to introduce more efficient management of livestock and production, farmers still seem to prefer cash crops to livestock breeding and meat production, it would seem that the Ivory Coast would remain dependant on imports to satisfy the ever increasing global demand for meat, and in particular for beef. Thus it would seem likely that in the foreseeable future the Ivory Coast will import slowly rising quantities of beef for its growing population. However, it also seems likely that, when available, importers would prefer to import live animals for slaughter from neighbouring countries rather than meat although some quantities of meat proper will probably continue to be imported.
Ghana extends over a total area of 238,540 km² (approximately the size of Romania) of which 1,500 km² is arable land and 700 km² permanent crop land. Permanent pasture land is believed to extend over an area of 30,000 km². An estimated 22,000 hectares are under irrigation. The population was estimated at 11,679,000 persons in 1980, growing at an average rate of 3 per cent a year. Of the economically active population, 50.8 per cent is estimated to work in agriculture. Ghana's economy has seen serious problems in recent years with insufficient revenues and ever increasing expenditures, resulting in budget deficits made more difficult to overcome because of the soaring inflation (at rates of over a 100 per cent). The national disposable income has increased from 3,266 million cedis** (current prices) in 1973 to 6.131 million in 1976 while GNP per capita was estimated at US$ 400 in 1979, up from US$ 270 in 1970. However, because of the high inflation rate real income is likely to have decreased since. Ghana's main foreign exchange earner is cocoa, the proceeds of which has been increasing steadily while volume, however, has been trending downward due to aging trees and lack of replantation. More recently, cocoa prices on the world market have dropped markedly thus increasing further the plight of the Ghanaian economy.

Livestock population, meat production, consumption and imports

Ghana's livestock population has shown a steady increase in the last several years according to national and FAO figures. Cattle numbers increased from 876,000 head in 1973 to 950,000 head in 1980, sheep numbers increased from 1,506,000 head to 1,700,000 head, goat numbers from 1,559,000 head to 2,100,000 and pig numbers from 334,000 head to 415,000 head. Poultry numbers, however, appear to have decreased somewhat in the same period, (from 12,036,000 head to 12,000,000 head).

As concerns bovine meat production, it was estimated at 13,000 tons in 1980, up slightly from 12,427 tons in 1973. Goat and sheep meat production was estimated to have risen from 1,866 tons in 1973 to around 11,000 tons in 1980 and pork production is suggested to have increased from 2,434 tons (1973) to 9,000 tons (1980) whereas poultry meat production rose from 12,000 tons to 18,000 tons in the same period.

According to calculations made on the basis of estimates of production and imports, apparent consumption of fresh, chilled and frozen meat doubled between 1973 and 1980 (from 30,497 tons to 62,200 tons) (but the possibility of 1980 being overestimated should be taken into account). Beef consumption increased from 12,720 tons in 1973 to 23,000 tons in 1980 (1.36 kgs per capita and 1.96 kgs per capita)

*FAO

**100 cedis = US$ 36.36; 1 US$ = 2.75 Cedis (April 1980)
respectively) whereas mutton and goat meat consumption increased from 3,322 tons to 11,000 tons, pork consumption went up from 2,434 tons to 9,000 tons and poultry consumption from 12,021 tons to 18,200 tons. Even considering the high rate of population growth, it appears that meat consumption on a per capita basis has increased since 1973 although the estimated figure for 1980, as has been mentioned, may be too high (1973: 3.26 kgs per capita; 1980: 5.24 kgs per capita). As in the Ivory Coast, it is important to note that consumption of fish, both locally produced and imported, is comparatively high (estimated at 28.5 kgs in 1976) at a price which is slightly more than 10 per cent of that of beef.

Most of the meat imported into Ghana in recent years have been that of beef, the volume of which has increased many fold since 1973 when it stood at 293 tons, reaching an estimated 10,000 tons by 1980. It seems likely that the same volume, at least, was imported in 1981*. The only other meat for which information is available is that of poultry, the imports of which is modest but has increased from 21 tons in 1973 to an estimated 200 tons in 1980. Regarding imports of live animals, the available information suggests that there have been no imports of cattle since 1977 (compared to 50,511 head in 1973) but that imports of live sheep were estimated at 2,500 head in 1980 down from 12,367 head in 1973. Reportedly, cattle imports started to decrease in 1974 because of foot and mouth disease but also because of payment difficulties and drought conditions in supplying countries. In 1975 and 1976 the decrease was spectacular (1974: 47,326; 1975: 8,914; and 1976: 1,295). As a result of these factors, the government oriented imports towards meat rather than live animals.

**Outlook**

Beef is imported into Ghana exclusively by official organisms. To import, they need an import licence and an allocation in advance of the foreign exchange necessary. Both import licences and foreign exchange allocations are restricted when the domestic situation so warrants. The goal of the authorities in Ghana has for many years been to become completely self-sufficient in agricultural products, and the country is in fact to a very large degree dependant on the exports of certain agricultural products such as cocoa. However, information in the last few years suggests that the development of the sector is not proceeding as it was hoped due to, it seems, in part for reasons of organization and investment but also to a lack of a good distribution system. In the present very difficult economic situation, it would not seem that Ghana would be able to speed up the progress of development. Thus, it appears that meat production, except maybe that of poultry meat, could not be increased much beyond the present level in the near to medium term,

*Reportedly, Uruguay exported over 4,000 tons to Ghana in January-October 1981 and 6,000 tons was reported to be due in November 1981. The exports are reportedly made under an agreement concerning the import by Ghana during a two-year period of 25,000 tons of beef. The first delivery was scheduled for November 1981.*
indicating that if the consumption level of around 5 kgs per person estimated to have been reached in 1980 is to be sustained, Ghana would have to import increasing amounts of meat. However, it has been suggested recently that Ghana will have to discontinue imports of most if not all products in the coming months due to the lack of funds (i.e. foreign exchange) and it is believed that imports of meats would suffer greatly if that suggestion is verified. Accordingly, although Ghana may continue to import some quantities of meat, in view of the above-mentioned agreement and if the foreign exchange is available, it is believed that the Ghanaian market will remain very uncertain for some time to come, unless the economic situation dramatically changes in the near future.
## ANNEX

### CATTLE NUMBERS ('000 head)

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### BEEF PRODUCTION (Metric tons)

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*Provisional  
**July–June Year  
\(^1/\) 1974/1975  
\(^2/\) 1977/1978

Sources: National Statistics and FAO
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<td>125,744</td>
<td>39,781</td>
<td>60,000</td>
<td>1,900</td>
<td>-</td>
</tr>
<tr>
<td>1981*</td>
<td>1551/</td>
<td>2.7001/</td>
<td></td>
<td>76,8292/</td>
<td>32,8902/</td>
<td></td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Year</th>
<th>Consumption of Beef (Metric tons)</th>
<th>(per capita consumption per kg in parenthesis)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1973</td>
<td>48,333</td>
<td>84,981</td>
</tr>
<tr>
<td>1975</td>
<td>2,500</td>
<td>2,589</td>
</tr>
<tr>
<td>1978</td>
<td>13,398</td>
<td>9,247</td>
</tr>
<tr>
<td>1979</td>
<td>12,720</td>
<td>7,000</td>
</tr>
</tbody>
</table>

Provisional

1/ January-May
2/ January-September

Sources: National Statistics and FAO