The Polish delegation presents data on the production and trade situation in the meat market for three quarters of the current year, together with estimates for 1980. According to the census of July 1979, the livestock population consisted of: 13,037 thousand head of cattle, 0.6 per cent less than the previous year, of which 6,045 thousand head of cows, 0.6 per cent less; 21,950 thousand head of swine, 1.2 per cent less, of which 2,313 thousand sows, 5.3 per cent more; and 4,333 thousand head of sheep, 0.7 per cent less.

Purchases of live animals during the first ten months of the current year amounted to approximately 840 thousand tons of cattle for slaughter (live weight); 40 thousand tons of calves; 1,600 thousand tons of swine; 13 thousand tons of sheep; and 374 thousand tons of poultry. Industrial production in 1978 comprised 690 thousand tons (carcass weight) of beef and 49 thousand tons of veal; 1,766 thousand tons of pork; 26 thousand tons of mutton and lamb; 54 thousand tons of horsemeat and 358 thousand tons of poultry meat.

Over ten months of 1979, production amounted to 620 thousand tons of beef, 28 thousand tons of veal, and approximately 1,200 thousand tons of pork.

Per capita consumption in 1978 amounted to 70.6 kgs, including 17.3 kgs. of beef and veal, and 36.5 kgs. of pork. During the first nine months of 1979, consumption reached nearly 17 kgs. of beef and veal. There were practically no imports in 1979 (400 tons of beef and veal, and 100 tons of preserved beef).
During the same period exports amounted to a total value of approximately US$422 million. The details follow:

- Cattle for fattening - 146 thousand head (22.9 thousand tons)
- Cattle for slaughter - 20.4 thousand head (5.6 thousand tons)
- Calves - 20.3 thousand head (1.2 thousand tons)
- Beef and veal - 18.6 thousand tons
- Pork - 7.0 thousand tons
- Poultry - 7.6 thousand tons
- Bacon - 10.4 thousand tons
- Tinned ham and shoulders - 30.8 thousand tons
- Other meat preserves - 13.0 thousand tons
- Pork butcher's products - 1.3 thousand tons
- Horses for slaughter - 75 thousand head (21 thousand tons, carcass weight)
- Sheep for slaughter - 212.6 thousand head (4.7 thousand tons, carcass weight)
- Horsemeat - 12.3 thousand tons

Exports of cattle for fattening, calves, sheep, meat and poultry increased, while those of cattle for slaughter, horses for slaughter and meat preserves declined.

We expect the value of total exports for the current year to be 5 to 7 percent higher than that for 1978. Our deliveries of live bovine animals should amount to approximately 230 thousand head, and of beef and veal to 20 thousand tons. Exports of beef preserves should remain at the 1973 level of approximately 5-6 thousand tons.

The programme for 1980 is now under discussion and we are hoping for sales of a total value of US$500-525 million, including 220-230 thousand head of bovine animals (bullocks, adult cattle, calves), 9-13 thousand tons of mainly chilled beef and veal, and 6-7 thousand tons of beef preserves.

According to the estimates for 1980, the cattle herd will be stable or will increase only slightly. Pork and poultry production will be stressed for supplying the domestic market. To promote pork production, it will be
necessary to change the pattern of grain production on State farms in order to supply private pig farmers who do not have adequate quantities of feed. Other factors making for progress in this field consist of: improving the wheat/meat ratio; improving the structure of imports - i.e. reducing purchases of wheat (barley, maize) and increasing imports of protein-enriched feed; and, lastly, activating small producers (one cow, two-three pigs per year per farm) having one hectare or less of land, and farm workers who have left stock-farming (approximately 3 million pigs less annually as from 1976). Such pig farming was based on potatoes, with wheat only as a supplement. Success in this latter effort will depend mainly on decisions concerning prices: the price of potatoes as compared to that of pigs and to the retail price of pork.