ARRANGEMENT REGARDING BOVINE MEAT

THE WORLD MARKET FOR BOVINE MEAT

At 9 December 1983

Geneva, 27 January 1984

General Agreement on Tariffs and Trade
Centre William Rappard, 154 rue de Lausanne
1211 Geneva 21

84-0125

Introduction

The Arrangement Regarding Bovine Meat 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 to the benefit of both consumer and producer, importer and exporter. To this end, the Arrangement provides for a comprehensive information and cooperation mechanism applicable to live bovine animals and the bovine meat sector.

To date there are twenty-five signatories of the Arrangement - Argentina, Australia, Austria, Belize, Brazil, Bulgaria, Canada, Egypt, European Economic Community, Finland, Guatemala, Hungary, Japan, New Zealand, 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. The International Meat Council decided that this report, up-dated as appropriate in December each year, would be published annually.

The fourth annual report has been prepared by the secretariat, under its own responsibility, mainly on the basis of information and documentation furnished by participants to the Arrangement. It covers the situation in the market for bovine animals and meat principally in the year 1983, containing estimates for the second half of the year and for the year 1983 as well as forecasts for 1984. To the extent permitted by the data available, it gives information on cattle numbers, slaughter levels, production, prices, imports, consumption and exports of bovine animals and meat.

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Notes: "Tons" in the text means "metric tons, carcass weight", when not otherwise stated.

"Cattle numbers" in the country statistics include calves. Figures in these country statistics have been rounded.

I. INTERNATIONAL ECONOMIC SITUATION AND OUTLOOK

1. In its latest forecast[1] OECD indicates that the long-expected recovery in the world economic situation appears to be under way, although recovery was not expected before the second half of 1983 for some countries. Furthermore, in some countries, particularly in some European countries, recovery may be relatively slow. Real GNP growth in the OECD area for 1983 is forecast at 2 per cent (seasonally adjusted), compared to -0.4 per cent in 1982, and 3-3.5 per cent for 1984. However, there is likely to be wide variations between countries. Inflation rates are also improving with 5.75 per cent forecast for 1983 and 6 per cent for 1984 compared to 7.5 per cent in 1982. In June and August, 1983, the inflation rate in the industrialized countries registered , at 4.9 per cent, the lowest level in ten years, while the rate was slightly higher in July (5 per cent). Employment in the OECD area is forecast to decrease further in 1983 (-0.25 per cent) while OECD expects that with a return of better economic conditions it will start to pick up towards the end of the year, increasing by around 1 per cent in 1984. Unemployment levels, however, are forecast to continue to worsen, reaching 9.25 per cent of the workforce by the end of 1983 in the OECD area (33.5 million people) compared to 8.4 per cent in 1982. Another million people will be unemployed by the end of 1984 (9.5 per cent of the workforce).

2. According to recent data, economic activity in the United States is continuing the rapid recovery which started at the end of 1982. Preliminary figures released in the second half of September indicated that the annual GNP growth rate (seasonnally adjusted) in the third quarter of 1983 was 7 per cent compared to 9.7 per cent in the second quarter, indicating, according to forecasters, that the recovery will continue for the rest of the year and possibly much longer. Inflation rates are still decreasing from the already much improved level of 3.9 per cent in 1982, reaching 3.2 per cent (annual rate) in the third quarter of 1983. Unemployment in the United States is expected to increase further in 1983 to 10.25 per cent of the workforce compared to 9.7 per cent in 1982. A decrease to 9.5 per cent is forecast for 1984, due to expected increases in employment as a result of the recovery in economic conditions.

3. It is believed that the economic recession in Canada bottomed out towards the end of 1982 with real GNP dropping 4.4 per cent in that year. For 1983, a growth rate of 2.3 per cent has been forecast with a further increase of 5.0 per cent in 1984. Between mid-1982 and April 1983 inflation as measured by the overall consumer price index, decreased from 11.2 to 6.6 per cent. For 1983 inflation is forecast to drop to the 6 per cent range and a further drop to 5 per cent is expected in 1984. Unemployment rates are forecast to continue to rise in 1983 reaching 12.0 per cent of the labour force, up from 11 per cent in 1982. In 1984 employment is forecast to rise by 3.5 per cent, lowering unemployment levels to around 11.4 per cent of the workforce.

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[1] OECD, Economic Outlook, July, 1983.

4. Real GNP growth in Japan decelerated to 1.8 per cent in the last quarter of 1982, resulting in an increase of 3.6 per cent for the year as a whole. Activity is projected to strengthen moderately in the second half of 1983 due to, inter alia, a marked terms of trade improvement and recovery in exports. By international standards, Japanese inflation rates are low and have been forecast at around 2.5 per cent for 1982. However, it may possibly be lower since according to recent information the rate of increase for the twelve month preceding August 1983 was only 1.2 per cent. Although low compared to many other countries Japanese unemployment levels rose to 2.7 per cent of the workforce in the first quarter of 1983, the highest level for the last three decades. The unemployment situation is projected to worsen slightly in the next twelve month period reaching almost 3 per cent by the end of 1984.

5. According to Commission sources* the signs of recovery in economic activity in the European Economic Community since the last quarter of 1982, are timidly gaining force and preliminary figures indicate a real GDP growth of 1.8 per cent in both first and second quarter of 1983, and a modest rise in industrial production is apparent since the beginning of the year. Inflation rates in the Community vary strongly between individual countries but the Community average, at 8.2 per cent (annual rate), in July 1983 was the lowest registered in the last five years. Measures to ease unemployment and the beginnings of recovery in economic activity appear to have had favourable (although still modest) effects on the unemployment situation. In November 1983, more than 12 million people, over 11 per cent of the workforce, were unemployed, around 40 per cent of which was under 25 years old.

6. According to Government forecasts, the Australian economy is expected to pick up over the next year, reflecting the impact of stimulating fiscal policies, the end of drought conditions, and improved prospects for Australian exports due to a strengthening in major economies overseas. The balance of trade has improved recently, achieving a trade surplus of A$ 353 million in the first six months of 1983/84 compared to a deficit of A$ 892 million a year earlier. The trade gains came mainly from the non-rural sector, notably from coal, other minerals and processed products. Later in the year, it is expected that the rural sector will show an improvement as the benefits of the anticipated record grain harvest show up in the statistics. Inflation rates, although still comparatively high, are easing, mainly due to a slow down in the growth of wages, and since October-November 1983, there has been an across the board reduction in interest rates.

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*Economie Européenne, Supplement A, No.8-9, 1983

II. INTERNATIONAL SITUATION AND OUTLOOK IN THE BOVINE MEAT SECTOR

(i) Situation

7. Notwithstanding the apparent improvement of demand conditions in some countries, it appears that 1983 was another difficult year for cattle producers in many countries. In these countries the downtrend in cattle prices or producer returns, which had been occurring since roughly 1981, continued. The only exceptions to this general tendency were in countries where producer prices were supported or in certain exporting countries where either a major devaluation of that country's currency or a sharp decrease in that country's beef production caused a stabilization or increase of producer prices (Argentina, Uruguay, Australia and New Zealand appear to be in this latter category). In virtually no country, however, was there a situation where an improvement in producer returns occurred as a result of improved demand conditions.

8. This apparent continued downtrend in producer returns, the third year of such a decrease in many countries, has taken its toll in terms of cattle inventories. Of 18 countries which are signatories to the Arrangement Regarding Bovine Meat, for which data was available at the time of writing, 14 experienced cattle herd liquidation during 1983 compared to 12 of the same 18 in 1982. It is also believed that several of the remaining signatory countries experienced liquidation of cattle herds in 1983. Moreover, it is apparent that in a number of countries the rate of cattle herd liquidation (or at least of the beef cattle component of total cattle numbers) has accelerated in 1983 leading to an increase in beef production even though cattle numbers declined.

9. This situation has been most evident in Canada and the United States. In both countries beef and veal production is expected to increase by 2-3 per cent in 1983 relative to 1982. More importantly, production of beef from "non-fed" heifers, steers and cows (i.e. that most closely competitive with imported beef) is expected to be greater than that of 1982. This factor alone seems to have offset, during the first 8-9 months of 1983, any significant positive influence for imported beef which would have resulted from improved consumer incomes in North America during that period. Import levels decreased relative to 1982 levels in both countries and, in addition, prices were only at about year-earlier levels. It might be noted that the major suppliers to the United States (Australia, New Zealand and Canada) each agreed to restrain their exports to the United States as from mid-August 1983 in order to avoid activating the "trigger level" prescribed by the Meat Import Law. The United States also agreed that its exports to Canada could be limited by Canada.

10. Similarly in many countries in Europe beef supplies are likely to exceed those of 1982 in 1983. In these countries, however, as contrasted with Canada and the United States beef demand declined

further in 1983. Essentially, economic recovery has not progressed as far in Europe as it has in North America and, compounding the demand problem, there has been increased supplies of both pork and poultry in many of these countries. In the European Economic Community the improvement of the supply-demand balance in the bovine meat market which was evident in 1981-82, changed dramatically in 1983. There have been sharply (3-4 per cent) increased supplies meeting indifferent demand. It is believed that this development has significantly affected the EEC's trade balance in 1983 and it is known that it influenced intervention stock levels. It is expected that by year-end stocks of intervention beef could reach 425,000 tons, the highest level on record.

11. The world wide recession also appears to have further diminished beef demand in Middle Eastern countries. Imports by virtually all countries of this region (with the exception perhaps of Israel and Iraq) are expected to be below year-earlier in 1983. In the same manner imports in most East European countries including the Soviet Union are expected to be lower. As regards the Soviet Union it should be noted that in the last two years (i.e. 1981 and 1982) it was the world's second largest importer of beef and veal. Its entry into world markets, however, was based largely on a shortfall of production relative to "targetted" levels. The shortfall in production was due, amongst other reasons, to poor condition of cattle at the time of slaughter. In 1983, however, (for the first nine months) 80 per cent of the 4 per cent increase in beef production in the Soviet Union was due to increased average carcass weights, a fact largely attributable to improved pasture and forage conditions. Therefore, assuming a continuation of favorable weather conditions, Soviet beef production is likely to continue to increase and imports to decrease.

12. The few bright spots which existed in the international bovine meat market in 1983 are in the Far East and most specifically in the Republic of Korea and Japan. Imports by Japan are expected to exceed those of year-earlier and reports suggest that prices received by Japan and Korea have been above those of year-earlier. The essence of the demand strength in both countries is the strength of growth of consumer incomes and the stagnation of domestic production. In South Korea, for example, unofficial estimates suggest that real consumer income will grow at 8.1 per cent in 1983. In Japan, relatively strong growth was supplemented (at least early in 1983) by strength in the pork market owing largely to strength in imported pork prices. In addition, cattle herds in both countries appear to be in a strong expansion phase. While in the longer term this will result in higher levels of beef production, in the short term such rapid expansion of herds has the effect of restraining beef production increases as more female animals are withheld from the market for breeding purposes. However, if one looks at the latter half of 1983 in Japan, it should be noted that slaughter and production were above year-earlier levels; therefore, in assessing the future supply-demand situation in that country is not yet clear.

13. As regards exporting countries the situation in 1983 have been diverse. In Australia, conditions appear to have improved to the extent that drought conditions ended and that producer prices increased as a result of decreased production and the depreciation and devaluation of the Australian dollar. On the other hand, both Australia and New Zealand experienced an acceleration of herd liquidation. With respect to the South American exporting countries, 1983 was not a particularly good year. In each of Argentina, Brazil, and Uruguay domestic demand was weak as was that on principal export markets. Prices received for exports by all three countries, expressed in US dollars, decreased and Argentina's exports are believed to have declined sharply (although expressed in national currencies these prices represented increases). Both Brazil and Uruguay are expected to experience significant growth in exports, however, with those of Brazil (on a carcass weight equivalent basis) nearly equalling those of Argentina.

Selected Countries' Trade in Beef and Veal

A. Exports[1/]

	1981	1982	% Change from Year-earlier	1983[2/]	% Change from Year-earlier	1984[2/]	% Change from Year-earlier
Argentina	486.0	522.0	+7.4	425.0	-18.6	420.0	-1.2
Australia	710.1	941.9	+32.6	752.0	-20.2	714.0	-5.1
Brazil	293.2	361.7	+23.4	410.0	+13.4	420.0	+2.4
EEC	562.0	393.0	-30.1	490.0	+24.7	490.0	0.0
New Zealand	345.0	357.4[3/]	+3.6	356.0[3/]	-0.4	290.0	-14.0
Uruguay	173.0	169.0	-2.3	215.0	+27.2	101.0	-53.0
United States	99.9	115.0	+15.1	120.0	+7.0	140.0	+13.8
Canada	77.7	81.9	+5.4	85.0	+4.3	80.0	-5.9
	2,746.9	2,942.0	+7.1	2,853.0	-3.0	2,655.0	-6.9

B. Imports[1/]

	1981	1982	% Change from Year-earlier	1983[2/]	% Change from Year-earlier	1984[2/]	% Change from Year-earlier
Brazil	61.0	21.0	-65.4	40.0	+90.5	60.0	+50.0
Canada	81.0	88.2	+9.3	85.6	-3.0	88.0	+2.8
EEC	314.0	374.0	+19.1	375.0	-0.3	365.0	-2.7
Japan	178.0	176.0	-1.1	185.0	+5.1	190.0	+2.7
United States	799.0	888.1	+11.2	837.0	-5.7	826.0	-1.5
	1,433.0	1,547.3	+8.0	1,522.6	-1.6	1,529.0	+0.4

1/ Carcass weight equivalent, includes fresh, chilled, frozen, cooked, canned and otherwise prepared bovine meat.

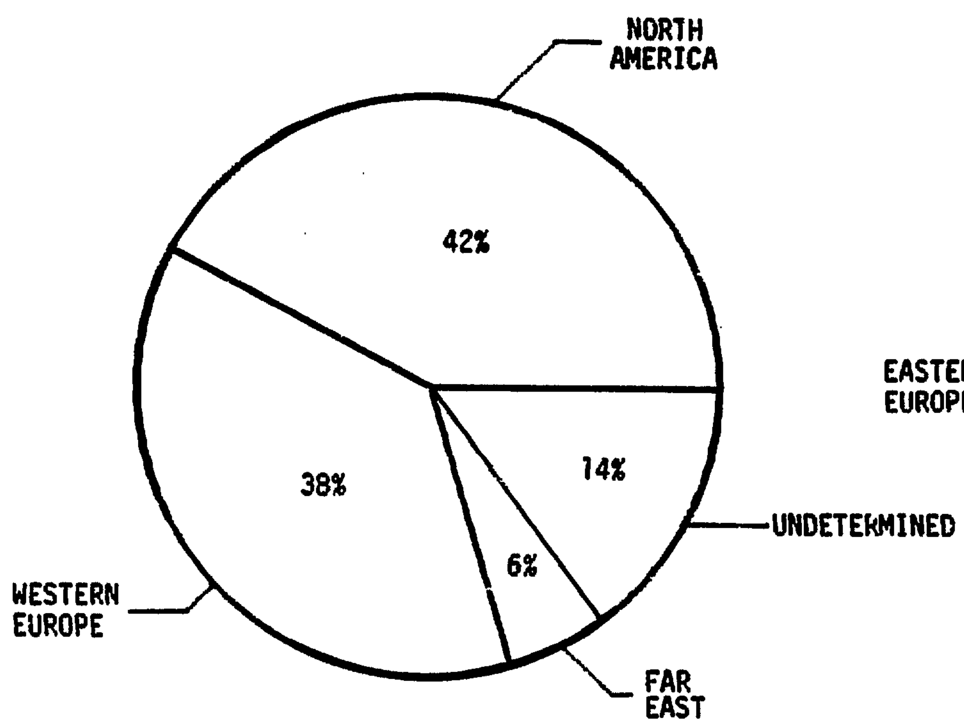
2/ Forecast

3/ Estimate

DESTINATION OF THE EXPORTS * OF SIX * * LEADING BOVINE MEAT EXPORTERS

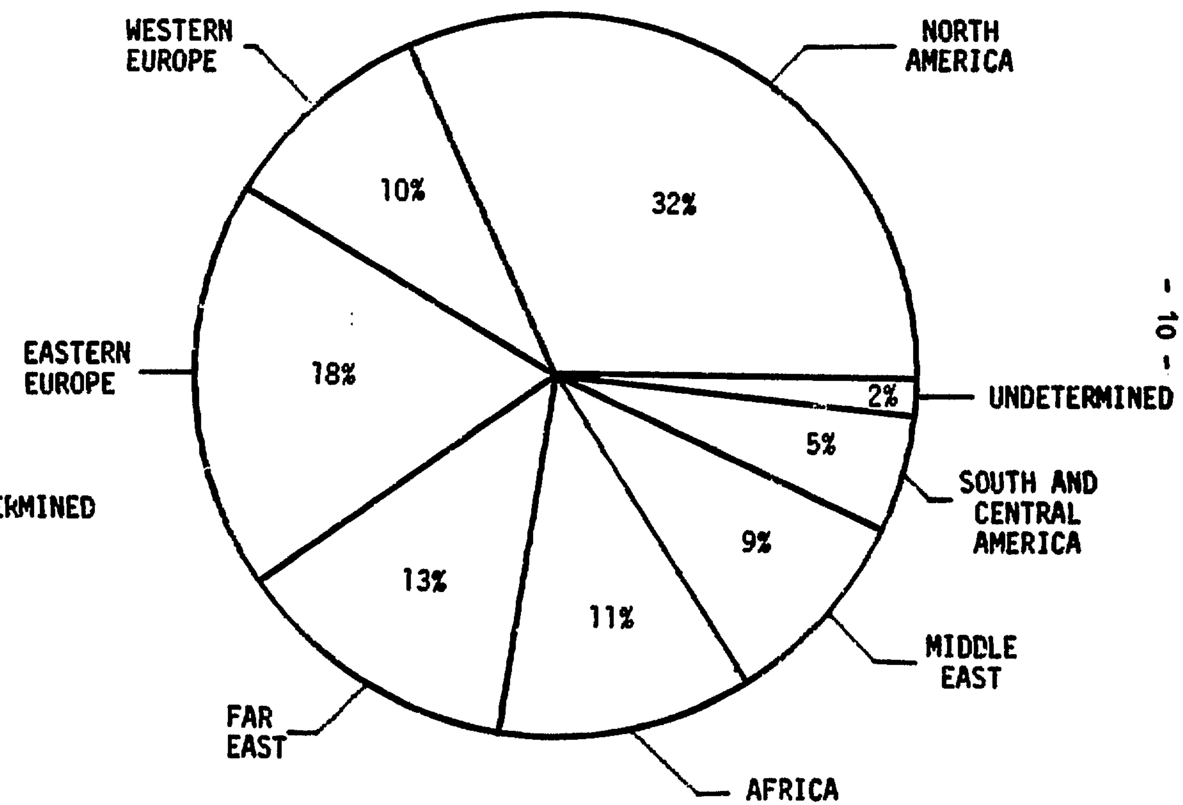
AVERAGE 1971-72 AND 1981-82

1971-72



TOTAL EXPORTS
=1,038,000 Tonnes

1981-82



TOTAL EXPORTS
=1,614,000 Tonnes

* Product weight; fresh,chilled and frozen.
*ARGENTINA,AUSTRALIA,URUGUAY,BRAZIL,NEW ZEALAND,EEC.

SOURCE: GATT and National sources.

(ii) Outlook

14. Although there are some encouraging signs for international bovine meat markets for 1984, negative factors seem more numerous. On balance it would appear that 1984 could be another mediocre year as regards returns to producers.

15. The most important of the positive signs is the likelihood of the continuation of economic recovery in North America and the Far East and the spreading of that recovery to the trading partners of countries in other regions. Growth in consumers' spending power is an absolute prerequisite to sustainable recovery in international bovine meat markets. Assuming that economic growth continues at a rapid pace in North America and the Far East and that this growth is transmitted to Europe, North Africa and the Middle East (in the form of higher oil prices in the latter two regions) beef demand will receive a significant boost. That being said, it is necessary to make a few cautionary points with regard to the anticipated recovery. Firstly, it is uncertain as to whether the growth expected in 1984 will be sufficiently large or widespread to aid beef demand taking also into account possible changes in consumption patterns. Moreover, there is some doubt as to whether one year is sufficient time for consumers in some countries to consolidate their financial positions before embarking on increased expenditures for relative "luxury" items such as beef. Finally, there are some people who question the durability of the economic recovery itself in 1984. To a certain extent the recovery appears threatened by the magnitude of governments' deficits (which imply higher interest rates) and international monetary instability. It might also be noted that even with sustained recovery, most forecasts do not suggest any improvement in unemployment in many countries.

16. One development which is likely to have both positive and negative implications for international bovine meat markets is the escalation of international feedgrain and soyabean prices since mid-1983 and the increased level of manioc prices since late 1982. As regards positive implications these increases will almost certainly influence the production of pork and poultry in most countries. At a minimum they will restrain the upswings in production which had been expected for 1984. It is also possible that they could cause significant decreases of production of these products as occurred in a similar situation in 1974 and 1975. The most important negative implication of these events in feedgrain markets is that they virtually guarantee an increase in beef production in many countries. In North America, they guarantee an increase in manufacturing-quality beef production. This increased production in North America will result from three factors: (1) higher beef cow slaughter (there is an inverse relationship between feeder calf prices and feedgrain prices); (2) increased slaughter of "non-fed" steers and heifers (i.e. reduced number of animals placed in feedlots); and (3) an accentuation of dairy cow slaughter. In other countries the grain price increases could impart negative influences to the extent that dairy cow slaughter increases. In several countries as well this strength in grain markets comes at a critical time. In essence, in countries such as Australia, Argentina, Canada, and the United States where grain is an alternative production possiblity for many cattle

producers, producers may choose to abandon cattle production (after having seen returns decline for 2-3 years) in favor of grain production. It might be noted that the supply of "non-fed" beef in the United States could be further augmented with the passage of the year 1983 Dairy Bill. The Bill includes measures designed to increase dairy cow slaughter as a means to reduce surplus milk production. Estimates suggest that 1,000,000 head of cows will be slaughtered as a result of these measures, increasing production by slightly less than 300,000 tons.

17. Another negative aspect for the international market in 1984 is the likelihood of reduced imports by the Soviet Union. Assuming that normal climatic conditions exist in 1984 the Soviet Union's total production of meat could increase by up to 4 per cent (even taking into account slower growth of poultry production). While there appears to be some degree of sensitivity of the level of the Soviet Union's beef imports to the level of export refunds available from the EEC, in total, demand for imported beef is likely to be down.

18. Given the likelihood of a decrease in Soviet imports during 1984, the likelihood of increased beef production and export availabilities of the EEC, and the contracts and contacts the three major South American exporters have in the Middle East and North Africa, it is probable that competition for export sales in the Middle East and North Africa will be particularly intense in 1984. Moreover, it appears likely that offers from Brazil of frozen boneless beef will increase further (Brazil could become, ceteris paribus, the world's third largest bovine meat exporting country in 1984). As regards the demand situation in North Africa and the Middle East it could be noted that these countries are just now feeling the effects of the recession experienced in the industrialized world for the last 2-3 years. As far as the Gulf states are concerned it is worth noting that the foreign labour force there constitutes an important component of the beef consuming population and have in fact been the largest consumer of imported meat. In the past year the size of this expatriate work force has decreased as either workers have been repatriated or as they leave voluntarily, they have not been replaced. The decrease is expected to continue in 1984 as particularly the number of construction projects declines. In the surrounding Middle Eastern States not only will oil receipts probably be down but, the amount of financial aid received from the Gulf states is also likely to decline. Amongst other things this could put pressure on certain of these countries to reduce the subsidies used to maintain retail (imported) beef prices at artificially low levels.

19. In view of the possibility of increased beef and veal production in a number of importing countries, the possibility of increased restrictions as regards imported beef also exists. Although there have as yet been no signs that this will be so, it should be noted that most importing countries possess the legislative machinery to permit them to limit imports.

III. COUNTRY-BY-COUNTRY ANALYSIS

United States

20. In the United States cattle and calf numbers totalled 123,540,000 head at 1 July, 1983, 0.5 per cent below year-earlier. This decrease means that the United States' cattle inventory cycle has now been in a liquidation phase for a year and a half. The decrease also includes a sharper contraction of the reproductive portion of the beef cattle herd: beef cow and heifer numbers decreased by 1.7 per cent. It might also be noted that this contrasts with a 1.0 per cent increase in dairy cow and heifer numbers. The basic reason for the contraction of the beef cattle herd is, of course, the decreased prices of feeder cattle during the last 2-3 years. It might be noted that following the census of cattle numbers at 1 July the principal cattle producing areas of the United States were struck by a serious drought. This fact alone would suggest that further herd liquidation occurred in the second half of 1983. Added to that, however, has been further weakening of feeder cattle prices. Cattle numbers at 1 January, 1984, therefore, are certain to be below those of year-earlier. Moreover, since no strengthening of cattle prices seems imminent and considering the prospect of strong grain prices well into 1984, a continuation of herd liquidation throughout 1984 seems probable.

21. The reduction of cattle herds which occurred during the first half of 1983 strongly influenced the pattern of cattle and calf slaughter in the United States. Cattle and calf slaughter totalled 25,736,100 head (1.7 per cent more than year-earlier) during the first eight months of 1983. The influence of herd liquidation is evident in the proportion of slaughter accounted for by female animals: 49 per cent versus 47 per cent for the same period of 1982. It is the highest percentage for that period since 1978. From the point of view of the international market, however, the most important trend was the decrease of "non-fed" cattle slaughter: cow slaughter decreased by 1.0 per cent and non-fed steer and heifer slaughter by nearly 30 per cent (or, in total, a decrease of 8.6 per cent). It is the beef derived from such animals with which imported beef competes most closely. During the first eight months of 1983 calf slaughter totalled 1,925,900 head, 1.0 per cent less than year-earlier. Barring a major acceleration of the rate of cattle herd liquidation it seems likely that cattle slaughter in the United States will decrease in 1984. Current forecasts suggest a decrease of 1 to 2 per cent to 36,300,000 head and a decrease of 6 per cent in calf slaughter to 2,950,000 head. The non-fed cattle slaughter, especially cows, is expected to show an increase in 1984. The prospect of such an acceleration should not be discounted, however since the magnitude of the influence on herd liquidation of the further erosion of returns of "cow-calf" producers in 1983 and of the higher grain prices are as yet unknown. Added to this uncertainty is the magnitude of increase of dairy cow slaughter which would result from measures designed to limit milk output. At present the most one can say with any degree of certainty is that non-fed cattle slaughter's proportion of the total will increase, and could increase markedly.

22. Beef production in the United States during the first half of 1983 totalled 5,023,133 tons, 2.4 per cent above year-earlier. The greater increase of production than of slaughter indicates an increase in carcass weights arising from the increased proportion of "fed" cattle in the slaughter mix. Profit margins on fed cattle throughout the first half of the year were generally positive and, normally, this leads to an increase of the number of cattle in feedlots and an increase of average weight of those cattle. With regard to the outlook for beef production levels for 1984 the same comments as were made for cattle slaughter apply: in principle a decrease of total production seems likely barring a major acceleration of cattle herd reduction and, regardless of uncertainties with respect to total production, production of manufacturing quality beef will likely increase. In the absence of such developments a decrease of 3.7 per cent of beef production (to 10,112,900 tons) and of 6 per cent of veal production (to 190,000 tons) seems possible.

23. One of the more interesting developments of the first half of 1983 was the apparent increase of beef and veal consumption. Total consumption for the period is estimated at 5,556,763 tons, or 3.2 per cent more than year-earlier. However, it seems likely that consumption in the second half of the year did not increase by as much. While the general economic climate has progressively improved in the United States during 1983 (thus benefitting beef consumption) there were a number of developments which probably affected consumption negatively . Most notable of these was the weakening of pork prices, but also important was the reduction of beef imports. For the year as a whole consumption is forecast to total 10,966,000 tons (2.1 per cent more than a year-earlier). For 1984, a more robust growth in beef demand seems, at present, quite possible. It is expected that the economic recovery in the United States will be sustained and strong throughout the latter part of 1984. If, as some forecasters believe, GNP growth reaches 8-9 per cent in nominal terms, normal relationships suggest a 4-4.5 per cent growth in beef demand. Although pork supplies are expected to increase sharply for at least part of the year, the effect of competitive meat prices on beef demand is normally much less than that of income growth. As beef supplies (either domestic or foreign) may not be adequate to meet this growth in demand, part of that growth could be deflected into higher prices rather than increased consumption. In fact, currently, it is believed that consumption could decrease in 1984 by some 3 per cent.

24. In general, price trends for cattle and beef in the United States in 1983 were disappointing reflecting the poorer economic climate earlier in the year and increased supplies of beef throughout the year. At the same time the trends in prices of manufacturing-quality beef and fed-beef deviated reflecting the divergent trends in supplies of each meat. While manufacturing-quality beef (cow-beef) averaged near year-earlier, fed beef prices averaged below year-earlier. There seems to be good reason to expect that there will be some improvement in prices during 1984. The effects of income growth and possible stable beef supplies on prices could be tempered by higher pork supplies during the first half of 1984, but probably not significantly. At the same

time, manufacturing beef prices will probably not benefit to the same extent from improving demand as will fed beef. In fact, prices of this beef could be stable-to-weak throughout the first half of the year relative to year-earlier. In this regard it should be noted that pork in the United States is more competitive with manufacturing beef than is fed-beef, and that cow and non-fed steer and heifer slaughter will be relatively high.

25. Imports of fresh, chilled and frozen beef and veal totalled 423,065 tons, product weight, for the first eight months of 1983, some 3.3 per cent more than year-earlier. Imports of cooked, canned, and processed meat totalled 53,283 tons product weight for the same period. Information which became available during late June and early July of 1983 indicated that anticipated imports for 1983 as a whole would exceed the calculated "trigger" level of the United States' Meat Import Law of 558,378 tons (which is 7 per cent lower than the trigger level of 1982). Consequently voluntary restraint agreements were negotiated with Australia and New Zealand and an understanding concerning import levels was reached with Canada. Australia's restraint level was set at 272,158 tons; New Zealand's at 165,336 tons; and Canada's level at 58,968 tons. It might be noted that this year's "trigger" level is less than the "minimum" level established in the Meat Import Law (566,996 tons) but above the minimum access negotiated by the United States in the MTN (544,316 tons).

26. During the period January-July, 1983, the United States exported 44,084 tons of fresh, chilled and frozen beef and veal, 4 per cent more than year-earlier. Japan was the destinaton of 69 per cent of these exports.

	1981	1982	% Change 1982/81	1983	% Change 1983/82	Forecast 1984
Cattle numbers 1/	114,321	115,604	+1.1	115,201	-0.3	..
Beef and veal 2/:						
Production	10,353	10,425	+0.7	10,705	+2.7	10,303
Imports	799	888	+11.2	837	-5.7	826
Consumption	11,083	11,190	+1.0	..	..	10,905
Exports	100	115	+15.0	120	+4.3	140

1/ '000 head at 5 January

2/ '000 tons

Japan

27. The Japanese cattle industry in 1983 continued to exhibit strong growth, as it has since 1975. It is estimated that at 1 February, 1983, cattle numbers totalled 4,590,000 head, 2.3 per cent more than year-earlier. As has been evident in the last two inventory reports, the trend toward an accelerated growth of beef cattle numbers and a slowing of growth of dairy cattle numbers was sustained in 1983: while beef cow numbers and beef heifer numbers increased by 4.4 and 4.5 per cent respectively, dairy cow numbers increased by only 0.5 per cent and dairy heifer numbers contracted by 1.9 per cent. This trend reflects the culling of dairy cows (due to the over-production of dairy products) with low productive capacity. That being said it should be remembered that dairy cows still outnumber beef cows by a ratio of 2.2 to 1. Moreover, in 1983, with increased costs of production and stable support prices it appears that the economies of Wagyu cattle production have changed. It may be, therefore, that the expansion of Wagyu cattle numbers of recent years will slow down. It might be noted that since this expansion of cattle numbers started in 1975, total numbers have increased by 26 per cent (or by 946,000 head). This evidence of rapid expansion of cattle numbers is, however, somewhat misleading. While there has been a rather rapid expansion of the reproductive potential of the Japanese cattle herd since 1975 (as shown by a 19 per cent expansion of dairy cow numbers and a 10 per cent expansion of beef cow numbers) the greatest part of the expansion has been due to the retention of male calves for slaughter at mature weights: the number of steers (dairy and Wagyu) has increased by 57 per cent. Based on slaughter trends in 1983 it appears likely that cattle numbers will continue their expansion in 1984.

28. As regards slaughter it appears that slaughter levels will increase only by an amount consistent with the herd growth which occurred in the last 1-2 years, i.e. by 1-3 per cent. For the first six months of the year slaughter totalled 649,000 head, only 0.5 per cent more than year-earlier. Of this total only 22,000 head were calves. Moreover, a slight decrease in average carcass weights during the first half of 1983 meant that beef and veal production was unchanged from year-earlier at 223,000 tons. However, since the third quarter, slaughter is above year-earlier levels and average carcass weights are recovering. For the year as a whole production may be expected to be somewhat higher than the year-earlier level of 481,000 tons.

29. Although beef production in Japan virtually stagnated during the first half of 1983, total beef and veal consumption increased by 4.7 per cent. The increase in supplies available for consumption was, of course, due to increased beef imports. It might be noted that this consumption increase occurred despite increased retail prices for beef and before the introduction of measures designed to improve the marketing and consumption of imported beef. For the year as a whole, however, the upward trend may not be as strong. With regard to the measures to improve the marketing and consumption of imported beef, they are designed to increase the number of wholesale markets qualified to purchase imported beef, to make designated stores eligible for discount sales of beef from LIPC and to increase the number of stores designated by LIPC to receive discounted beef (from 2,300 to 3,000).

30. As regards imports it might be noted that they totalled 91,000 tons during the first six months of 1983, an increase of 16.7 per cent relative to year-earlier. Although supplies from all sources increased, the United States again experienced an increase in its market share. This share which was 26 per cent in 1982, increased to 28 per cent during the first half of 1983. New Zealand's share increased from 3 to 6 per cent while Australia's decreased from 70 to 66 per cent. It might be noted that in 1977 Australia's share was 85 per cent and the United States was 9 per cent. It might also be noted that the United States' market share has increased despite the fact that beef imported from the United States is significantly higher priced than that from other sources (in 1981, for example, frozen boneless beef imported from the US was priced roughly 50 per cent higher than Australian product (average import value)). Apparently, inter alia, US beef is viewed as having a quality advantage over other imported beef (it being grain-fed) and enjoys a competitive edge in terms of the homogeneity of the product. The beef import quota for the first half of the Japanese fiscal year 1983-84 totalled 72,000 tons, product weight, (64,000 tons general quota and 8,000 tons special quota). This was 2,000 tons more (all of which is for the general quota) than for the first half of JFY 1982. At the time of writing the full quota for the second half of the fiscal year has not been announced: only the "special" quotas amounting to 7,800 tons had been fully allocated. However, an interim general quota of 32,200 tons was announced. The announcement of the full general quota awaits the clarification of the supply-demand situation in Japan

31. With respect to prices, the market appears to have been relatively firm in Japan despite increased production and imports. For most of the current fiscal year it appears that prices for Wagyu and dairy steer carcasses (wholesale and second grade) averaged above the mid-points of their respective price stabilization bands. With regard to the stabilization bands it could be noted that for the current fiscal year they are unchanged from those of 1982. This is the third year in which stabilization prices have been unchanged. This means for dairy steer carcasses a band of Yen 1,120-1,455 per kg. and for Wagyu steer carcasses one of Yen 1,400-1,820 per kg.

	1981	1982	% Change 1982/81	1983	% Change 1983/82
Cattle numbers 1/	4,385	4,485	+2.3	4,590	+2.3
Beef and veal 2/:					
Production	471	481	+2.1	223 3/	0
Imports	178	176	-1.1	91 3/	+16.7
Consumption	647	658	+1.7	314 3/	+4.7

1/ '000 head at 1 January

2/ '000 tons

3/ January-July

Canada

32. The financial situation for cattle producers in Canada has deteriorated steadily since 1980. In 1982 this deterioration culminated in the commencement of cattle herd liquidation after only three years of herd growth, the shortest rebuilding phase of any cattle cycle in Canadian history. During the first half of 1983 the further deterioration of financial conditions, combined with pessimism regarding future conditions, caused the rate of herd liquidation to accelerate. Cattle and calf numbers at 1 July, 1983, totalled 12,585,700 head, a decrease of 3.5 per cent from year-earlier. This was the second year of decline for cattle numbers in total and the third year of decrease for the beef herd. During the first half of 1983 the decrease in beef cattle numbers was supplemented by reductions in the dairy herd. This development reflects measures taken by the Canadian Government to curb milk output. The decrease represents an end to a brief two year uptrend in dairy cow numbers. It seems likely that the liquidation of beef and dairy herds will continue for at least the next year or two. In this regard one must note the following: the virtual stagnation of "feeder" cattle prices in 1983 after two years and a half of successive decreases; the sharp increase in feed costs, especially for dairy producers (i.e. corn and soya prices) since July; and the increase of grain prices which can provide a production alternative to some "cow-calf" producers in the western provinces.

33. Normally after two years of cattle herd liquidation one observes the commencement of a sharp downtrend in cattle and calf slaughter. To all appearances, however, this was not the case in Canada in 1983. For the period January-August slaughter of cattle of domestic origin was unchanged from year-earlier, at 2,156,100 head, although if one takes account of the sharp increase in the number of slaughter cattle exported to the United States (109,000 head), the effects of cattle herd liquidation are more obvious. For the year as a whole slaughter is expected to decrease by only 1.0 per cent (to 4,375,000 head). Although data on dairy versus beef cow slaughter is not available, it is evident that there was a sharp increase in slaughter of dairy cows since there were sharp increases in cow slaughter in the provinces of Quebec, Ontario and British Columbia. In these provinces dairy cows account for the vast majority of total cow numbers. During the next year slaughter levels will reflect both the continued liquidation of dairy and beef herds and the liquidation which has already occurred. In other words, a downtrend in total slaughter is possible while an increased share will be accounted for by cows. For 1984 slaughter is forecast to decrease by about 3 per cent to 4,254,776 head.

34. These general trends should also be reflected in beef and veal production in 1984. For 1983, however, production is expected to average about 3 per cent above year-earlier. There was a sharp increase in average carcass weights of cattle slaughtered in Canada in 1983, more than offsetting the modest increase in numbers slaughtered. For 1984 forecasts suggest a decrease in production (4 per cent), one that will likely exceed the rate of decrease of slaughter. In this regard, the increased proportion of cows in the slaughter mix will serve to decrease average carcass weights and, secondly, carcass weights of cattle from feedlots will decrease reflecting increased feed prices. However, the possible increase in dairy cow slaughter and the continued high level of beef cow slaughter suggest a possible further increase in manufacturing quality beef production.

35. The increase in beef production, the continued weak beef demand and the weakness of cattle prices in the United States were the factors responsible for the decrease in slaughter cattle prices in Canada in 1983. During the first ten months of the year, for example, the price of A1, 2 (choice) steers at Toronto averaged Can$ 173.37 per 100 kgs compared to Can$ 178.56 per 100 kgs one year-earlier. At the same time, the prices of feeder cattle averaged above year-earlier (Can$ 10-15 per 100 kgs more) for the same period. That being said, further improvements in feeder cattle prices will be attendant upon further improvements in slaughter cattle prices. Continued high feeding costs for the first 8-10 months of 1984 will tend to act as a break on feeder prices. (It should be noted that feeder cattle prices are inversely related to feed prices.) At the same time fed cattle prices could experience only modest improvement.

36. During 1983 it appears that beef demand in Canada remained weak and was most certainly weaker than in the United States. Per capita consumption is expected to average at about the same level as in 1982 (42 kgs per capita) despite increased beef production. In essence, prices did not decrease sufficiently to permit the totality of the increased beef supplies to be absorbed domestically. As a consequence, exports of both cattle and beef increased. For the period January-August exports of beef totalled 53,733 tons (product weight), 1.5 per cent more than year-earlier. Slaughter cattle exports increased by 44 per cent for the same period (to 108,919 head). It should be noted that Canada has agreed to restrain its exports of fresh, chilled and frozen beef and veal to the United States during 1983 to a level of about 59,000 tons (product weight). To implement the Canada - United States beef and veal arrangement export permits have been required for all exports of fresh, chilled and frozen beef and veal to the United States effective 22 August 1983. To the end of October, around 56,000 tons had already been exported to the United States.

37. With regard to beef imports in 1983, Canada has experienced a sharp increase from New Zealand and the United States (up 21 and 22 per cent, respectively) but these have been more than offset by the sharp decrease in imports from Australia (down 51 per cent). In total, imports decreased by 6 per cent for the period to 40,604 tons (product weight). For the year as a whole imports (including canned and cooked product) are expected to decrease by 3.0 per cent to 85,600 tons. Canada has also required, since August, the issuance of individual permits for the importation of beef and veal. The United States has also agreed that its export to Canada can be limited (by Canada) to a level of 10,400 tons, product weight.

	1981	1982	% Change 1982/81	1983	% Change 1983/82	Forecast 1984
Cattle numbers[1/]	13,365	13,036	-2.5	12,586	-3.5	..
Beef and veal[2/]:						
Production	1,016	1,029	+1.3	1,060*	+3.0	977
Imports	81	88	+9.3	86*	-3.0	88
Consumption	1,030	1,037	+0.7	1,037*	0.0	1,021
Exports	78	82	+5.4	85*	+4.3	80

*Estimates 1/ head at 1 July 2/ '000 tons

South Africa

38. Cattle numbers in South Africa totalled 8,445,000 head in August, 1982, one per cent more than year earlier and the second increase in a row. The cause of the increase was the rise in producer returns in 1981. Dairy and beef heifer numbers showed the largest increase (by 18 and 9 per cent respectively) while that of bulls and calves decreased (by 14 and 7 per cent respectively). The cattle census in August, 1983, indicates a decrease of 2.9 per cent to 8,200,000 head, the lowest level in five years. This drop in numbers was due to the drought conditions prevailing in the country until recently. However, it is expected that herd liquidation soon will cease and in the medium term return to 1982 levels. During the first six months of 1983, total cattle and calf slaughter showed little variation when compared to the same period of 1982. However, cow and heifer slaughter increased by 13 per cent and calf slaughter 16 per cent, while adult male cattle slaughter fell by 6 per cent. The rise in cow, heifer and calf slaughter was mainly due to the drought. Beef and veal production, which in 1982 totalled 590,000 tons, an increase of about 16 per cent compared to year earlier, continued to rise during the first six monchs of 1983, reaching 306,800 tons against 290,600 tons in the same period of 1982. This increase in production was due to the rise in cow, heifer and calf slaughter and higher average slaugther weights. Production is expected to total 604,500 tons in 1983.

39. Cattle and beef prices in 1982 fell at all levels. This downward movement appears to be related to increased supply. In the second quarter of 1983, prices strenghtened: average wholesale prices for manufacturing grade increased by 2.4 per cent, table grade prices by 6.7 per cent, producer prices by 12.7 per cent and retail prices, which had already shown an increase in the first quarter, by 6 per cent. However, the large surplus of both beef, sheep meat and poultry on the market affected the prices downard and they reached a low in August, 1983. Recently the floor price was increased by 7 per cent from R 205 c/kg to 220 c/kg and it is hoped that this increase will ensure a steady flow of beef onto the market, smoothing out the fluctuations resulting from the now breaking drought. Imports of live cattle, which in 1982 had declined by 44.3 per cent, continued to decrease in the first half of 1983, totalling 66,000 head (116,000 head in the same period of 1982). Feeding problems due to the drought conditions was one of the causes for the continued reduction of South African imports of live cattle. Imports of beef and veal during the same period reached 12,500 tons, 42 per cent more than year earlier.

40. As a result of an increased supply and lower retail prices, consumption of beef and veal in 1982 increased by 8.3 per cent. As mentioned above, the increase in retail prices in the first half of 1983 may affect consumption and this upward trend may, if not be reversed, at least slow down its progression. In the medium-term increase in consumption is expected to be due more to a rise in population than to

an increase in per capita consumption. Given the increase in slaughter of cows, heifers and calves, and the corresponding increase in the supply of beef and veal, South Africa is expected to export about 3,000 tons of frozen beef and veal in 1983.

	1981	1982	% Change 1982/81	1983	% Change 1983/82	Forecast 1984
Cattle Numbers 1/	8,353	8,445	+1.1	8,200	-2.9	8,300-8,400
Beef and Veal 2/:						
Production	517	599	+15.9	605*	+0.9	554
Imports	20	20	-1.5	19*	-3.1	19
Consumption	599	649	+8.3	664*	+2.3	678

*Estimates

1/ '000 head, August

2/ '000 tons

Norway

41. It is estimated that cattle and calf numbers in Norway totalled 1,009,000 head at 20 June 1982, 0.5 per cent less than year-earlier. This decrease ended a lengthy period of cattle herd build-up. The decrease does not reflect a slow-down of the increase of the breeding herd: cow numbers increased by 1.6 per cent, heifer numbers by 1.4 per cent. The decrease was due entirely to reduced male cattle numbers (down 15 per cent) resulting principally from the sharp increase in calf slaughter. In 1983, however, it is believed that cow numbers will begin to decrease as well, reflecting efforts to stabilize milk production. Preliminary figures for the June 1983 cattle census indicate a further decrease of the cattle herd of 0.5 per cent to 1,004,000 head. Cattle and calf slaughter totalled 421,000 head in 1982, 14.7 per cent more than in 1981: calf slaughter increased by 92.9 per cent to 54,000 head, and adult cattle slaughter by 8.1 per cent to 359,000 head. The increase in calf slaughter is attributed mainly to the introduction of a temporary slaughter premium for calves in the summer of 1982. The premium amounts to 700 NKr per calf slaugthered at a weight of less than 30 kgs. This measure was introduced in an attempt to stabilize both meat and milk production. Beef and veal production totalled 80,000 tons in 1982, 6.2 per cent higher than in 1981. The increase in veal production, arising from the calf slaughter premium system, was large (65 per cent to 2,800 tons) but average carcass weights decreased. Beef production, at 77,200 tons was 5 per cent higher than in 1981. Measures were introduced in 1982 to reduce future cattle slaughter and beef production in view of excess production in recent years and resulted in

a small decrease to 79,000 tons in 1983. A further decrease of 4,000 tons is projected for 1984. Target prices were only modestly increased, marketing fees were increased, credit availability for investment in livestock production was reduced, and slaughter premiums for calves were introduced. It is believed that these measures will reduce beef production in 1983 but the magnitude of the decrease is uncertain.

42. Norwegian beef and veal imports totalled only 1,100 tons in 1982 compared to 3,800 tons in 1981 and 12,500 tons in 1980. The cause of the decrease was mainly increased domestic production, coupled with stagnant demand. Import levels are expected, at 1,000 tons to be marginally lower in 1983. Beef and veal consumption is estimated to have totalled 74,000 tons in 1983, a decrease of 1.3 per cent compared to year-earlier. Normally not an exporter of beef and veal, Norway exported 6,100 tons in 1982 (versus 1,600 tons in 1981 and 700 tons in 1980). Exports of the same order are expected for 1983. The development of an exportable surplus is largely related to increased beef production. Roughly half of the exports in 1982 were to the USSR.

	1981	1982	% Change 1982/81	1983	% Change 1983/82	Forecast 1984
Cattle numbers1/	1,017	1,009	-0.8	1,004*	-0.5	980
Beef and veal2/:						
Production	75	80	+6.2	79*	-1.3	75
Consumption	71	75	+5.6	74	-1.3	70
Imports	4	1	-71.1	1	-9.1	..
Exports	2	6	+281.3	6	0	..

*Preliminary

1/'000 head at 20 june

2/'000 tons

Switzerland

43. The April, 1983, cattle census in Switzerland indicated a total of 1,918,600 head, the lowest figure since 1973 and the fourth consecutive annual decrease. Compared to year-earlier, numbers fell by 1.3 per cent. All categories declined except dairy heifers which increased by 6.7 per cent. Steer numbers decreased most (-28.4 per cent) followed by that of beef heifers (-9.5 per cent). Part of the last few years declines in cattle numbers took place in response to the Government's policy of paying, upon request, a contribution to farmers who voluntarily eliminate or reduce excess livestock in a appreciable proportion by 31 December 1983. Slaughter levels decreased by 7.9 per cent to 404,900 head in Switzerland in the first six months of the year and it is expected that for the year as a whole slaughter will show a

decrease of some 6 per cent, totalling 782,900 head compared to year-earlier. In 1984 a recovery of some 7 per cent in slaughter levels is projected. In line with falling slaughter, beef and veal production declined in the first half of the year, totalling 77,000 tons, down 6,9 per cent compared to year-earlier. The discrepancy between the decline in production and that of slaughter is due to fewer calves in the slaughter mix and heavier slaugther weights of adult cattle. Production of beef for 1983 is expected to total 115,400 tons, a decrease of 5.3 per cent compared to 1982, while that of veal is forecast at 35,200 tons, a fall of 7.9 per cent and consistent with the tendency to keep calves longer. For 1984, a 12 per cent rise in total beef and veal production is forecast, indicating an increase in slaughter weights.

44. Provisional consumption figures for the first half of 1983 indicate a decline in beef and veal consumption of some 2.8 per cent, to 83,400 tons, due apparently to higher retail prices of beef while for instance that of pork has declined. For the year as a whole, total consumption is, at 168,100 tons, expected to show a decrease of 4.4 per cent with an 11.8 per cent rise in the last quarter compared to the third. Per capita consumption for 1983 is estimated at 25,8 kgs, a drop of 3.7 per cent compared to year-earlier. In 1984, consumption of beef and veal is projected to pick-up, rising by some 7 per cent. Imports of beef in the first half of 1983 increased some 11 per cent to 6,000 tons compared with year earlier, 2,700 tons of which were fresh and chilled beef. For the year, Switzerland expects to import 12,300 tons of beef (+8.9 per cent compared to 1982), 6,400 tons of which would be fresh and chilled.

	1981	1982	% Change 1982/81	1983	% Change 1983/82	Forecast 1984
Cattle numbers 1/	1,954	1,945	-0.5	1,919	-1.3	1,930
Beef and veal 2/:						
Production	154	160	+3.7	151*	-5.9	169
Consumption	179	176	-2.0	168*	-4.4	180
Imports	13	11	-14.4	12*	+8.9	11

*Preliminary 1/ '000 head, April 2/ '000 tons

Tunisia

45. Cattle and calf numbers in Tunisia totalled 601,000 head in 1983, a 5.2 per cent decrease relative to year-earlier but 6.4 per cent more than the previous "low" of cattle numbers in 1979. Roughly 56 per cent of cattle and calf numbers in Tunisia are dairy cows while 23 per cent are calves. It is believed that the cattle herd will resume expansion

for at least the next two years. Numbers for 1984 are projected to total 617,000 head (+2.7 per cent) and 636,000 head in 1985 (+3.1 per cent). Notwithstanding the rebuilding of the cattle herd which occurred in Tunisia during 1982, cattle slaughter is estimated to have increased sharply (by 23 per cent to 231,800 head). This is entirely due to an increase of estimated "uninspected" slaughter. It could be noted that roughly 20 per cent of the cattle slaughtered in Tunisia in 1982 were imported. The level of total slaughter is expected to decrease by 10.2 per cent in 1983, while inspected slaughter is expected to decrease by 5.2 per cent. Production of "inspected" beef in Tunisia in 1982 totalled 33,020 tons, virtually the same amount as in 1981. Production is estimated to increase by 6.1 per cent in 1983 to 35,000 tons, due to more adult males in the slaughter mix, and to 36,400 tons in 1984.

46. During the last three years Tunisia has emerged as a significant importer, particularly of live cattle. In 1982, Tunisia imported 45,100 head of cattle (excluding breeding cattle) compared to 41,700 the year before, and an average of about 9,000 head per year in the four preceding years. Estimates suggest a significant increase (+19.7 per cent) in imports in 1983 to 54,000 head. The vast majority of these cattle came from the EC (86 per cent in 1982) with France, Ireland, and the Federal Republic of Germany being the major suppliers. Imports of beef continue to increase at a sustained rate and are estimated at 8,900 tons in 1983, some 16 times more than in 1980. (4,750 tons in 1982). The emphasis on live cattle imports apparently relates to limited cold storage capacity, traditional meat marketing methods (consumer preference for fresh meat), and the requirement that slaughter be performed according to religious rites. Beef consumption increased by 3.1 per cent in Tunisia in 1982 relative to 1981, to 49,500 tons or 6.8 kgs per capita. Since the calculation of consumption data appears to be based only on inspected meat production, consumption reflects the modest increase in inspected meat production and beef imports. Notwithstanding this increase in supplies offered to consumers, retail beef prices remained relatively high. Consumption is expected to increase by a further 11.1 per cent in 1983 to 55,000 tons (7.1 kgs per capita) and in 1984 to 59,100 tons (7.4 kgs per capita).

	1981	1982	% Change 1982/81	1983	% Change 1983/82	Forecast 1984
Cattle numbers 1/	625	634	+1.4	601	-5.2	617
Beef 2/:						
Production	33	33	0	35*	+6.1	36
Consumption	48	50	+3.1	55*	+11.1	59
Imports	6	5	-13.6	9*	+87.4	13

*Estimates 1/ '000 head 2/ '000 tons

Egypt

47. Cattle and calf numbers in Egypt were estimated at 1,794,000 head at the census in November 1982, a drop of some 3.1 per cent compared to year-earlier. The cattle herd is kept principally for dairy purposes and has decreased regularly in recent years. Since 1977, for instance, the herd has declined by 254,000 head (-12.4 per cent). By contrast the number of buffaloes, more suited to the conditions in the country, have risen from 2,266,000 head in 1977 to an estimated 2,393,000 head (+5.6 per cent) in 1982. Beef and veal production has declined in the last several years from 123,000 tons in 1977 to an estimated 113,000 tons in 1982 (-8.1 per cent) while buffalo meat production has shown a regular increase from 107,000 tons in 1977 to an estimated 126,000 tons (+17.8 per cent) in 1982, making up for the shortfall in beef production. Demand for bovine meat has increased substantially in recent years in response to better living conditions and a marked preference for beef and buffalo meat that the local production is not able to satisfy. Thus, imports have risen from 39,697 tons in 1977 to 108,850 tons in 1981 (+174.2 per cent). In 1982 Egypt imported some 74,115 tons between January and November. Some sources believe that total bovine meat imports for the whole year were in excess of double that volume. Major suppliers on the Egyptian market in 1982 were Argentina, Uruguay, the United States and Ireland. Egypt has in the last few years, also increased its imports of live cattle which in 1981 amounted to 89,257 head and in January-November 1982 to 103,661 head compared to 984 head in 1977 and 5,390 head in 1980. Most of the animals are imported from Ireland.

	1981	1982	% Change 1982/81	1983	% Change 1983/82	Forecast 1984
Cattle numbers 1/	1,852	1,794	-3.1	..	..	..
Buffalo numbers 1/	2,370	2,393	-0.97	..	..	..
Production 2/:						
of beef	115	113	-1.7	..	..	..
of buffalo meat	123	126	+2.4	..	..	..
Consumption	..	..	..	..	..	..
Imports	109	74*	(-32.1)	..	..	..

*January-November

1/ '000 head

2/ '000 tons

European Economic Community

48. The downtrend in cattle numbers in the European Economic Community, which had been experienced in 1980 and 1981, ended in 1982. Numbers at 1 December, 1982, totalled 78,791,000 head, 1.1 per cent more than year-earlier. The commencement of an uptrend was confirmed by the mid-year census of 1983. This census indicates an increase of 0.6 per cent. The reversal was due primarily to an expansion of the dairy herd. Dairy cow numbers increased by 1.6 per cent in 1982 (2.1 per cent at mid-year 1983) and it is believed that an increase in the number of heifers for dairy purposes was responsible for the 1.1 per cent increase in heifer numbers. It might be noted that beef cow numbers decreased by 0.9 per cent (2.2 per cent at mid-year 1983). Currently it is expected that cattle numbers at 1 December, 1983, will total 79,500,000 head or 0.9 per cent more than in 1982.

49. A combination of increased carcass weights and increased slaughter levels is expected to have led to sharply higher beef and veal production in 1983. At present production is forecast to rise by 3 per cent over the level of 1982 (i.e. to 6,850,000 tons). There is good reason to believe that the increases in production so far in 1983 have been significant as intervention purchases since July have been high. Moreover cattle reference prices in most EEC countries have been at or below year-earlier levels throughout most of 1983. Even though the live cattle guide price was increased by only 5.5 per cent for the 1983/84 year, the reference price so far in 1983 had not, as of mid-October, moved above 80 per cent of the guide price (90 per cent of the guide price is the so-called "intervention price"). For the year as a whole market prices are expected to only average 2-3 per cent above year-earlier.

50. The high rate of intervention purchasing in 1983 has led to a massive increase in the level of intervention stocks. At the end of September these stocks, at 318,694 tons, were two and one-half times more than those of one year-earlier. By year-end they are expected to be as high as 425,000 tons. It might be noted that intervention buying was restricted to forequarters only during July-August but buying of carcasses was resumed in September. Intervention purchasing was restricted to hindquarters only in early November. It might be noted that as of late November it was believed that intervention stocks were constituted of roughly equivalent proportions of forequarter and hindquarter beef. It appears that a larger proportion of forequarter beef in intervention is exported.

51. It is generally expected that the worsening supply-demand balance in the EC will affect its trading situation. Essentially, increased exports and decreased imports are expected. For 1983 imports are expected to be relatively unchanged from year-earlier at 375,000 tons and exports (excluding live cattle) might increase by some 25 per cent (to 490,000 tons). As regards imports in 1984 it is understood that the

high-quality beef quota will remain unchanged at 29,800 tons and that the GATT frozen beef quota will remain at 50,000 tons. The amount of the balance sheet quotas, however, is not yet known.

	1981	1982	% Change 1982/81	1983 1/	% Change 1983/82	Forecast 1984
Cattle numbers 2/	77,937	78,791	+1.1	79,500	+0.9	
Beef and veal 3/:						
Production	6,928	6,654	-4.0	6,850	+3.0	7,000
Imports 4/	314	374	+19.1	375	-0.3	365
Consumption	6,770	6,603	-2.5	6,630	+0.4	6,695
Exports 4/	562	393	-30.0	490	+24.7	490

1/ Forecast
2/ '000 head at 1 December
3/ '000 tons
4/ Excluding live cattle and calves

Austria

52. Cattle and calf numbers in Austria totalled 2,546,000 head at 3 December 1982, 0.7 per cent more than year-earlier. Over half the number of cattle and calves were dairy cows and heifers (54 per cent), while the number of cows and heifers raised for beef purposes composed 9 per cent of inventory. Although the number of dairy cows decreased by 0.4 per cent (the only category to do so), the number of dairy heifers increased by 2.3 per cent suggesting that dairy cow numbers may resume their uptrend in 1983. Cattle and calf slaughter totalled 756,000 head in Austria in 1982, 7.6 per cent less than in 1981. Adult cattle slaughter decreased by 10 per cent while calf slaughter increased by 1.6 per cent. The increase in cattle numbers during the last two years may suggest that slaughter will decrease in 1983. Beef and veal production in Austria totalled 199,500 tons in 1982, 2.9 per cent less than year-earlier. Beef production totalled 183,500 tons, veal production 16,000 tons. The decrease in production was considerably less than that in slaughter reflecting an approximately 4 per cent increase in average carcass weights. The national average producer price for slaughter cattle in Austria in 1982 was 2,434 schillings per 100 kgs, 6.1 per cent higher than in 1981. The increase was much less than that experienced in 1981 relative to 1980, despite a much sharper decrease in production. This would suggest that beef demand was relatively weak in 1982.

53. Austria imported only 9,000 tons of beef and veal in 1982, compared to 12,000 tons in 1981. The majority of beef imported was frozen, most of which originating from Uruguay. In Austria beef and veal consumption totalled 184,000 tons (24,5 kgs per capita) in 1982, 2.6 per cent less than year-earlier. Austria exported 23,000 tons of beef and veal and 20,000 head of cattle and calves in 1982 compared to 18,000 tons and 26,000 head in 1981. These represent, respectively, an increase of 27.8 per cent and a decrease of 23,1 per cent. Seventy per cent of the live cattle exported went to Libya and the rest to the EC. Virtually all fresh and chilled beef and veal exports were to Italy. According to the export figures for the first half of 1983, exports will be largely the same as year-earlier.

	1981	1982	% Change 1982/81	1983 1/	% Change 1983/82	Forecast 1984
Cattle numbers 1/	2,517	2,535	+0.7	2,546	+0.4	..
Beef and veal 2/:						
Production	206	200	-2.9	..		..
Consumption	184	..	..	..		..
Imports	12	9	-25.0	..		..
Exports	18	23	+27.8	..		..

1/ '000 head, December of preceeding year

2/ '000 tons

Finland

54. Cattle and calf numbers in Finland are expected to show a decrease for the third year in a row at the census in December 1983, totalling some 1,600,000 head compared to 1,632,600 head a year earlier, a decrease of 2.0 per cent. Since 1980, the latest "peak" year, the finnish herd has diminished by 4.3 per cent, and by 26.4 compared to 1963 in which year herd numbers were the highest in the last two decades. All categories of cattle are expected to decrease except beef cows which, after a 24,7 per cent decrease in 1982 is expected to show an increase of some 14,7 per cent by the end of this year. Cattle numbers are forecast to decrease by another percentage point in 1984 with dairy cows and dairy heifers forecast to diminish by 1.5 per cent and 2.8 per cent respectively, in line with the government's efforts to curb dairy surplus production. Cattle slaughter in Finland increased by some 1.5 per cent to 308,300 head in the first half of the year, this being due entirely to a 3.7 per cent increase in the second quarter. Compared to the same period last year slaughter weights were up by some 7.9 per cent, due to an increase in slaughter of adult male cattle of 3 per cent and a decrease of calf slaughter. The efforts to reduce dairy production in Finland was reflected in the slaughtermix where dairy cows and heifers constituted around 40 per cent of the animals slaughtered, up from around 37.7 per cent in 1979. For the year as a whole slaughter is expected to increase by 1.5-3 per cent.

55. Beef and veal production in Finland increased by some 9.5 per cent in the first six months of 1983 to 60,360 tons, from 55,100 tons in 1982. Beef production increased by some 6.5 per cent to 58,070 tons and veal production by more than 300 per cent to 2,290 tons. Veal production has seen an almost constant decrease in the last two decades and the considerable rise in production in the first half of 1983 is apparently entirely due to a 19.7 per cent increase in slaughter weights whereas the number of slaughtered animals decreased. For the year as a whole, it is expected that Finland's total production of beef and veal will amount to 120,000-122,000 tons, some 2.8-4.5 per cent more than in 1982.

56. Average prices received by producers in Finland in the first half of 1983 dropped by some 16 per cent (in dollar terms) compared to year earlier, reaching US$394 per 100 kgs in the second quarter. In terms of Finnish Marks, however, the decrease was, at -0.17 per cent, marginal. The price expressed in dollars, was also below the target price negotiated on the basis of the Farm Income Act of 1982. Beef and veal consumption in this nordic country increased marginally (+0.15 per cent) in the first half of 1983 compared to year earlier, despite a 7 per cent increase in retail prices (in Finnish marks; the dollar price, however, decreased appreciably). The per capita consumption remained stable. For the year as a whole it is expected that consumption will total 100,000 tons, up 2.6 per cent compared to the previous year. This increase is due to the beginning of a recovery in economic conditions. Exports of bovine meat from Finland in the first six months of 1983 increased considerably compared to year-earlier, from 1,000 tons in January-June 1982 to 9,000 tons in the same period 1983. Considering the stock levels and the estimated surplus production for 1983, it is expected that some 20,000 tons will be exported in 1983 and a further 5,000 tons of exports are projected for 1984. A major part of Finnish meat exports are frozen and USSR is the biggest customer.

	1981	1982	% Change 1982/81	1983	% Change 1983/82	Forecast 1984
Cattle numbers 1/	1,634	1,633	-0.1	1,600*	-2.0	1,585
Beef and veal 2/:						
Production	122*	117*	-4.2	120* 122	+2.8/ +4.5	...
Imports	-	-	-	-	-	-
Consumption	106	107	+0.9	110*	+2.6	...
Exports	15	7	-53.3	20*	+186	25

*Estimates

1/ '000 head at 15 December

2/ '000 tons

Sweden

57. Cattle numbers decreased for the third consecutive year in 1983 in Sweden, totalling 1,911,000 head at the census in June. Compared to year-earlier the herd decreased by some 27,000 head (-1.4 per cent). The largest reduction took place in calf numbers (-2.48 per cent) while, as could be expected, dairy cow numbers decreased only marginally. In line with decreasing profitability for beef production, beef cow numbers have been decreasing fairly steadily for the past few years (-9.86 per cent since 1981) totalling 64,000 head at the June 1983 census. A further decrease in beef cow numbers is forecast for 1984 as well as for the herd as a whole while dairy cows are expected to stay stable. In the first six months of the year slaughter increased by 1.49 per cent compared to year-earlier. For the year as a whole it is forecast that some 705,000 head of cattle and calves will be slaughtered, 2 per cent less than year-earlier. For 1984 the same number of cattle is projected to be slaughtered as in 1983. Production of beef and veal in the first six months of 1983 remained as the same level as year-earlier. For the year as a whole beef and veal production is expected to show a 1.8 per cent decrease (at 160,849 tons) compared to year-earlier 160,849 tons).

58. Due to the economic situation (decreasing real incomes, unemployment rates) competition from other meats as well as a decrease in consumer subsidies, beef consumption has declined in the last few years. Sales campaigns at reduced prices have to some extent hold back the consumption decline. From a peak of 166,400 tons in 1976 (20 kgs/capita) consumption of beef and veal declined by some 15 per cent to 141,000 tons (17.0 kgs/capita) in 1982. An increase of 2,000 tons is expected in 1983 while in 1984 a 7.6 per cent drop is expected as a result of the removal of consumer subsidies for bovine meat on 1 December, 1983, and in spite of an expected slight upturn in economic conditions in 1984. Because of the imbalance at present between production and consumption Sweden is expected to export some 23,000 tons of mostly frozen beef and veal in 1983 and some 27,000 tons in 1984 compared to some 34,400 tons in 1982. Major customers (in 1983) were the USSR, Italv and Venezuela. Sweden imports some quantities of mostly frozen beef and veal. In 1983 total imports are expected to reach 6,600 tons compared to some 6,330 tons in 1982. A decrease to 4,400 tons is projected for 1984. Major suppliers (in 1983) were Yugoslavia, Australia, Poland, and the United States.

	1981	1982	% Change 1982/81	1983	% Change 1983/82	Forecast 1984
Cattle numbers 1/	1,939	1,938	-0.1	1,911	-1.4	1,911
Beef and veal 2/:						
Production	157	161	+2.6	158*	-1.8	156
Imports	5	6	+20.0	7*	+4.3	4
Consumption	143	141	-1.4	143*	+1.4	133
Exports	13	34	+166.7	23*	-32.3	27

*Estimates

1/ '000 head, June

2/ '000 tons

Australia

59. At 31 March, 1983, cattle and calf numbers in Australia are estimated to have totalled 22,471,000 head, a decrease of about 8.5 per cent from the previous year's level. In essence, it appears as though the drought conditions which existed to March, 1983, had a major impact on cattle numbers. In addition to the existence of drought conditions it is clear that the decrease was also related to the deterioration of market returns to producers in 1982. Despite the apparent ending of drought conditions since March and despite the significant improvement of cattle market prices it is not expected that an upturn in cattle numbers will occur before 1985. Moreover the forecast upturn in 1985 would require further and sustained improvements in export returns to improve producer confidence in the cattle industry. In addition to restoring producer confidence such an increase is needed to maintain the perceived profitability of cattle production versus that of other types of production, particularly of grains. It might be noted that cattle numbers continued to decline most strongly in southern and eastern areas of the country where more production alternatives exist. It is forecast that cattle numbers will decrease to 22,000,000 head at 31 March 1984 (down 2.1 per cent) then increase to 22,200,000 head in 1985. These forecasts, of course, assume a continuation of "normal" weather conditions.

60. After the surprisingly large increase in cattle and calf slaughter in 1982, brought about by the acceleration of herd liquidation, it is evident that total slaughter in 1983 reverted sharply to the downtrend consistent with the downtrend in cattle numbers which has been experienced since 1976. It is forecast that slaughter in 1983 will total about 8,000,000 head, some 15 per cent less than in 1982. During the first eight months of 1983 adult cattle slaughter decreased by 13.0 per cent and calf slaughter decreased 1.5 per cent. During this period cow and heifer slaughter constituted 48.2 per cent of the total which is well-above the level generally believed to be consistent with cattle herd growth. A further decline in slaughter is expected in 1984. A level of 7,500,000 head is forecast, a decrease of some 6 per cent, but the decrease could be much sharper should confidence return to the industry and herd rebuilding recommence. In the longer term, certain forecasts suggest that slaughter levels could fall as low as 6,800,000 head by 1987.

61. Beef and veal production is expected to decrease by a roughly similar amount as slaughter in 1983 (to 1,410,000 tons) that is by 16 per cent. During the first eight months beef production had decreased by 17.1 per cent and veal production had increased by 7.5 per cent. Also in line with movements in cattle slaughter, production is expected to decrease again in 1984, to about 1,372,000 tons, and to decline again in 1985. It is generally believed that cattle slaughter and beef production will contract most in those areas where alternative production possibilities exist, namely in the south and south-east.

62. Beef exports in 1983 are expected to contract by more than production. As a consequence beef and veal consumption is expected to account for a larger share of domestic production. For the first eight months of 1983 per capita consumption totalled 28.4 kgs, 17.0 per cent less than year-earlier. The increase in retail prices in Australia, and thus the contraction of consumption, was related to the higher prices (expressed in Australian dollars) received for exports. This, in turn, relates primarily to the lower value of the Australian dollar. This influence was reduced, however, during September and October as the Australian dollar appreciated (from about US$0.88 to US$0.92). For 1983 as a whole consumption is expected to total 662,000 tons (a decrease of 12.3 per cent) or 43 kgs per capita. General pessimism regarding export opportunities during the next four years leads to forecasts suggesting that domestic consumption will decline at a slower rate than production. This necessarily means that consumption will continue to account for a larger share of production in Australia.

63. With regard to exports, a total of 752,000 tons is expected for 1983 (down 20.2 per cent). For the period January-August exports totalled 339,354 tons (down 17.2 per cent). The decrease was expected to occur despite a sharp (10 per cent) devaluation of the dollar in March, 1983, and despite weak domestic demand. Of particular importance as regards these decreases is the reduction of exports to North America. For the period January-August exports to the United States were 184,634 tons, 17.2 per cent less than year-earlier, and exports to Canada (9,306 tons) were 45.0 per cent less. In the United States Australian exports met strong competition from both New Zealand and Canada (it might be noted that in addition to a transportation cost advantage, Canadian product in the United States market enjoys an advantage of being able to be shipped chilled rather than frozen). Moreover, the US manufacturing beef market was weak, particularly that portion of the market concerned with "grinding" beef. Not only were domestic supplies of beef adequate, but supplies of competitive meat for grinding were high. It might be noted that Australia has agreed to restrain its exports to the United States in 1983 to 272,158 tons, product weight; this level should be reached before year's end. At the same time, exports to certain Far Eastern markets, notably Japan and South Korea, were well above year-earlier in the January-August period. Far Eastern markets in total accounted for 37 per cent of Australia's exports in this period compared to 29 per cent one year-earlier. Notwithstanding this performance, it should be noted that Australia has faced increased competition in this area from numerous exporters, particularly from India, New Zealand and the United States. Australia exported 96,400 head of live cattle in 1982 (of which 56,400 head for slaughter) and expects a slight decline of these in 1983. The majority of these cattle are destined for immediate slaughter and almost all markets are in the Far East (Malaysia and Indonesia being the largest). Decreased supplies and continued weakness of export demand are expected to lead to a further reduction in exports in 1984 (5.1 per cent less to 714,000 tons) and to a further decrease in 1985 (645,000 tons).

64. As mentioned earlier cattle and beef prices in Australia averaged well above year-earlier levels during the first eight months of the year. As also mentioned above, however, this improvement in prices does not reflect an improvement in demand either domestically or in the international market. It results mainly from the decrease in domestic beef production and the decreased value of the Australian dollar. The high value of the Australian dollar in September and October is, however, believed to have adversely affected domestic prices.

	1981	1982	% Change 1982/81	1983	% Change 1983/82	Forecast 1984
Cattle numbers 1/	25,167	24,600	-2.3	22,471	-8.6	22,000
Beef and veal 2/:						
Production	1,421	1,679	+18.1	1,410*	-16.0	1,350
Consumption	713	755	+5.9	662*	-12.3	..
Exports	710	942	+32.6	752*	-20.2	714

*Estimates

1/ '000 head at 31 March

2/ '000 tons

New Zealand

65. Cattle and calf numbers in New Zealand are estimated to have decreased by 3.7 per cent during the year ended 30 June, 1983, to 7,622,000 head. This decrease was entirely due to a contraction of the beef cattle herd (down 8.2 per cent); the dairy cattle herd expanded moderately (3.7 per cent). The decrease (the third since 1980) reflects the uncertain market outlook, the decrease in real returns which have already occurred, and the extensive drought conditions which have existed in New Zealand since mid-1982. With regard to market returns, it could be noted that in the 12 months ended January, 1982, on-farm costs of production in New Zealand increased by 10.1 per cent. This increase followed an increase of roughly 60 per cent in the preceding three years. Consequently, even though there has been significant increases in prices in 1983, further increases will be required to restore cattle producers' confidence in the profitability of production and to restore growth of cattle herds. Total cattle numbers (dairy as well as beef) are expected to decrease in each of 1984 and 1985 (to 7,335,000 head in 1984, down 1.4 per cent, and to 7,290,000 head in 1985, down a further 0.6 per cent). A change in the ratio of beef to dairy cows since 1975 has been a significant development in the New Zealand cattle herd. The ratio, which was 1.17 in 1985, was only 0.87 in 1982 and is expected to fall further by 1975. This change implies a significant change in beef supply response from the New Zealand beef industry.

66. Notwithstanding the fact that cattle numbers have been trending downward in New Zealand for three years, adult cattle slaughter in the 1982-83 season (1 October 1982-30 September 1983) decreased by only 0.8 per cent (to 2,154,600 head). This figure confirms the cattle inventory estimate which suggests that there has been an acceleration of cattle herd liquidation. The continued liquidation of cattle herds suggests that slaughter levels will continue to trend downward during the next few years. Forecasts suggest that adult cattle slaughter will decrease by 15.6 per cent in the 1983-84 season (to 1,900,000 head) and by a further 3 per cent in the 1984-85 season. In addition to decreases originating from decreased inventory, it is expected that more animals will be slaughtered as calves. Calf slaughter is forecast to increase to 1,025,000 head by 1984-85, compared to 841,500 in 1982-83.

67. Reflecting the relative stability of slaughter levels in 1982-83, beef and veal production in New Zealand is expected to be unchanged from year-earlier at 517,000 tons (498,000 tons of beef and 19,000 tons of veal). Furthermore, in line with the anticipated decrease in slaughter, beef and veal production are expected to trend downward during the next two years. A 10 per cent decrease is expected for 1983-84 and a further 2 per cent decrease for 1984-85.

68. Even though it is expected that beef and veal production will trend downward during the next two years, it is expected that exports will decrease more rapidly. Consequently, it is believed that domestic consumption will account for an increased proportion of total production. In absolute quantities, however, it is believed that, for 1983, beef and veal consumption will be 153,000 tons (48 kgs per capita), versus 154,800 tons in 1982 (48.53 kgs per capita), a decrease of 1.4 per cent. For 1984 and 1985, it is believed that consumption will remain stable. For the 1982-83 season (October 1982-September 1983) beef exports totalled 232,540 tons, shipped weight, only 0.7 per cent less than year-earlier. In August, New Zealand agreed to restrain its exports to the United States to an annual level of 165,336 tons. For 1984 a decline of some 14 per cent in exports is anticipated (to 200,000 tons) and a further 3 per cent decline is anticipated in 1985.

	1981	1982	% Change 1982/81	1983	% Change 1983/82	Forecast 1984
Cattle numbers 1/	8,035	7,912	-1.5	7,622	-3.7	7,335
Beef and veal 2/:						
Production	498	516	+3.7	517*	+0.1	465
Consumption	148	155	+4.7	153*	-1.4	153
Exports 3/	226	234	+3,6	233*	-0.4	200

*Estimates

1/ '000 head at 30 June

2/ '000 tons ended 30 September

3/ Product weight

Argentina

69. The cattle herd in Argentina in 1982 totalled 52,500,0(head, a decrease of 2.8 per cent relative to 1981. According to estimates, herd numbers were expected to increase in 1983 by about 1 per cent, to 53,000,000 head. This increase should be due to rising numbers of beef cows, beef heifers and steers. Although the June 1983 census data were not yet available at the moment of the drafting of this report, a decrease in slaughter numbers suggests that this forecast is correct. The sharp increase in real producer prices and the excellent pasture conditions during the second half of 1982 certainly encouraged this development. Inspected cattle and calf slaughter, which traditionally represents about 75 per cent of total slaughter, totalled 5,027,000 head from January to July 1983, down 16 per cent from the same period a year earlier. The continuing decrease in slaughter which began in 1982, seems to indicate that herd rebuilding is on its way. Beef and veal production decreased by 11.9 per cent in 1982 relative to 1981, to 2,579,000 tons. According to estimates, a further decline should occur in 1983 and production should total about 2,340,000 tons. This decrease in production appears to be related to the herd rebuilding phase. As a result, prices on the internal market continued to strengthen in real terms during the first eight months of 1983, compared to the same period of 1982.

70. Export prices for boneless cowbeef in US dollar terms have continuously declined since 1981 - US$1,335 per ton in 1982 and US$1,305 in the third quarter of 1983. This decline in the dollar value of exports appears related mainly to the devaluations of the peso. Argentinian cattle producers are reportedly putting some pressure on the government in order to obtain financial support to maintain their competitiveness in the international meat market. To meet to some extent the concerns of the producers, the 20 per cent tax levied on meat exports was suspended on 4 October for exports of meat to Egypt for a period of 60 days. Total consumption and per capita consumption of beef and veal are forecast to reach, in 1983, their lowest level of the last 10 years with respectively 1,915,000 tons (down 7.0 per cent from year earlier) and 65 kgs (down 8.5 per cent). The decrease in beef production along with rising beef prices and a declining purchasing power, seem to be the main factors causing this depressed situation. However, in the second half of 1983, consumer income improved somewhat and the consumption recovered slighty.

71. Argentinian beef and veal exports in 1983 are estimated to have totalled 425,000 tons, a decline of about 18.6 per cent from 1982. During the first nine months of 1983, exports declined virtually to all the main destinations: EC 67 200 tons, a fall of 31 per cent (all types of bovine meat combined); Soviet Union 72,600 tons, less 18 per cent; Egypt 30,700 tons, less 38 per cent. Although exports to Israel increased by 57 per cent, to 26,600 tons, exports to other Middle East and African countries no longer offset the decrease in trade with Argentina's traditional markets, and in fact also fell dramatically.

Exports of canned beef to the United States, however, were still increasing, 64,000 tons from January to September 1983, but at a slower rate than in 1982. The reduction in consumption is not sufficient to offset the decline in production; thus, export availabilities are reduced, at a moment of increasing competition in the international markets.

	1981	1982	% Change 1982/81	1983	% Change 1983/82	Forecast 1984
Cattle numbers[1/]	54,000	52,500	-2.8	53,000*	+1.0	54,000
Beef and Veal[2/]:						
Production	2,929	2,579	-11.9	2,340*	-9.3	2,300
Consumption	2,410	2,059	-14.6	1,915*	-7.0	1,910
Exports	486	522	+7.4	425*	-18.6	420

*Estimates

1/ '000 head, June

2/ '000 tons

Uruguay

72. Cattle and calf numbers, which in June, 1982, totalled 11,237,000 head (1,6 per cent less than in 1981), beginning the liquidation phase of the cattle cycle, declined at a faster rate in 1983, 10.8 per cent, to 10,020,000 head. The causes of the decline in cattle and calf numbers are depressed market prices and increasing production costs. It is anticipated that cattle numbers will be reduced by a further 7.2 per cent in 1984.

73. Reflecting the beginning of cattle herd liquidation, cattle and calf slaughter in Uruguay increased by 12 per cent in 1982, to 2,219,000 head. An increase in the slaughter of cows and heifers was the major cause. In the first half of 1983, total slaughter increased further, but levelled off during the last six months and, for the year as a whole, is estimated to have remained roughly at the same level as in 1982. The liquidation of cattle seems to have reached its highest level and is projected to slow down as from 1984.

74. In spite of the increase of 12 per cent in slaughter, production of beef and veal in 1982 increased only by about 2 per cent. The cause of this disproportion was the decline in the average carcass weight of cattle and calves slaughtered (provoked by the feeding problems of excess cattle numbers since 1981) and the high proportion of cows and heifers in the slaughter mix. In 1983, this situation reversed and the higher proportion of adult males in the slaughter mix caused an increase in the average carcass weights of cattle slaughtered. As a result, production of beef and veal increased by 7 per cent, to 435,000 tons.

In 1982 producer prices and average export prices in real terms decreased. Excess supply appears to have been responsible for the fall of prices on the domestic market and fall of export prices was related to the weakness of international demand. However, the 80 per cent depreciation of the peso since the end of November, 1982, soon reflected on prices and, during the first three quarters of 1983, prices, in real terms, increased at all levels.

75. In 1982, the decline in prices at the retail level and the above-mentioned weakness in demand on the export market, explain the 5.8 per cent increase in consumption of beef and veal, which reached the record level of 238,000 tons. Per capita consumption reached 81 kg (78 kg in 1981), probably the highest level in the world that year, as consumption in Argentina was rapidly decreasing. However, this situation was exceptional and in 1983 consumption of beef and veal resumed more "normal" levels, totalling an estimated 220,000 tons and a per capita consumption of 74 kgs. This fall in consumption is, *inter alia*, the result of higher retail prices in real terms, and of rising exports.

76. Exports of beef and veal, which in 1982 had fallen by 2.3 per cent due to reduced exports to Brazil, increased by 27.1 per cent in 1983, reaching an estimated 215,000 tons. This sharp increase partly reflects the 80 per cent depreciation of the peso since November 1982. During the first nine months of 1983, exports to Brazil decreased further, totalling about 3,000 tons, product weight (as compared to 55,000 tons during the same period of 1981, and 9,000 tons in 1982) but were largely offset by exports to Egypt (53,000 tons product weight, 89 per cent higher than year-earlier and 44 per cent of total exports) and Iran. Exports to these markets are the result of supply agreements. Because of the expected strong fall in production, Uruguayan exports are forecast to decline sharply in 1984 and 1985, in spite of the recent reduction of the 15 per cent export duty to 10 per cent.

77. It is interesting to note that mostly as a result of the decline in imports from Brazil, the composition of Uruguayan meat exports changed considerably in 1982 and 1983. Frozen meat which in the last few years accounted, on average, for 60 per cent of overall meat exports, increased to 78 per cent in 1982 and 91 per cent in 1983, while fresh and chilled meat (the type of meat exported to Brazil), fell from an average of 32 per cent between 1978 and 1981, to 17 per cent in 1982 and 5 per cent in 1983. However, at the end of 1983, Uruguay exported 15,000 tons of fresh and chilled meat to Brazil, and thus, the composition of Uruguayan meat exports may be returning to a more traditional pattern.

	1981	1982	% Change 1982/81	1983	% Change 1983/82	Forecast 1984
Cattle numbers[1/]	11,421	11,237	-1.6	10,020	-10.8	9,296
Beef and veal[2/]:						
Production	398	407	+2.3	435*	+6.9	323
Consumption	225	238	+5.8	220*	-7.6	222
Exports	173	169	-2.3	215*	+27.2	101

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

Brazil

78. Cattle and calf numbers in Brazil were estimated to have reached 125,000,000 head in 1982, 3 per cent above year-earlier. In 1983, forecasts indicate that the herd could increase by a further 3 per cent, to 128,800,000 head. These estimated figures do not reveal the increase in slaughter provoked by falling prices. In 1982, cattle slaughter totalled 11,600,000 head, its highest level since 1977. However, carcass weights fell by about 14 kgs on average due to a large increase of cows and heifers in the slaughter mix. Slaughter rates in the first nine months of 1983 were 2.3 per cent higher than in the same period year-earlier, and are expected to keep at a high level for the year as a whole. In spite of the fall in carcass weight, production of beef and veal in 1982 increased by about 13 per cent, to 2,385,000 tons. In the first nine months of 1983 production increased by 2.6 per cent and, for the whole year, it may have reached 2,400,000 tons.

79. In real terms, producer prices in 1982 declined by about 15 per cent. However, during the first ten months of 1983 this price has recovered, increasing by 34 per cent and should have remained relatively stable for the rest of the year. Average retail prices for beef which had already risen in 1982 (in nominal terms), increased by about 28 per cent (in real terms) during the first ten months of 1983. This increase partly reflects the devaluation of the cruzeiro, but also much higher livestock production costs. As a result, consumption of beef and veal, which in 1982 was estimated to have increased by about 8.6 per cent, to 2,043,000 tons, from its depressed level of 1981 (1,882,000 tons, the lowest level since 1975), was estimated to have fallen again in 1983 to 1,950,000-2,000,000 tons which means about 15.5 kgs per capita. This fall in consumption is also related to the declining purchasing power and high unemployment rates.

80. In 1982, Brazil imported 21,057 tons of beef and veal (fresh, chilled and frozen), virtually all from Uruguay, a drop of about 65 per cent compared to year-earlier, while in the first nine months of 1983 imports totalled only 3,000 tons. Increased production, coupled with the fall of consumption and the efforts to increase exports, appear to be the main causes. However, at the beginning of July, the Brazilian Government announced an import quota of 50,000 tons of manufacturing beef to be imported before the end of December 1983. Under this quota, Brazil was expected to import 15,000 tons of beef from Uruguay and 25,000 tons from Spain before the end of the year. In 1984, imports are not expected to exceed 60,000 tons. Exports totalled 361,743 tons in 1982, up by 23 per cent compared to year-earlier. While the greater proportion of exports (roughly 60 per cent) in 1982 were again of canned beef, there was a sharp increase of frozen boneless beef exports, Irak and Israel being the main markets for this type of meat. The EC remained the main market for canned meat (with exports to the United Kingdom reaching 45,300 tons, product weight), followed by the United States and Irak. During the first nine months of 1983, Brazilian exports totalled 370,000 tons, up 36 per cent on year-earlier and, for the year as a whole, were expected to have increased by 15 per cent. Irak remained the main market for frozen boneless beef exports, while Israel did not import Brazilian meat during this period. The United

Kingdom remained the main market for canned meat and during the first nine months of 1983 imported 48,000 tons, up 6 per cent compared to the whole year 1982. The level of production and the fall in consumption provoked, inter alia, by higher domestic retail prices, allowed this expansion, in spite of a 10 per cent export duty recently introduced to compensate for the devaluations of the cruzeiro. In connexion with the devaluations, it is interesting to note that although beef and veal exports increased in volume in 1982, they declined in value. In order to achieve an increase in global value, in US$ (i.e. increase export earnings), export volumes will have to increase further (should prices in the international market decline) and, indeed, they are estimated to have reached some 400,000 to 420,000 tons in 1983. In 1984, exports are expected to reach 400,000 to 440,000 tons.

	1981	1982	% Change 1982/81	1983	% Change 1983/82	Forecast 1984
Cattle numbers* [1/]	121,404	125,046	+3.0	128,797	+3.0	..
Beef and veal [2/]:						
Production	2,115	2,385	+12.8	2,400*	+0.6	2,400
Imports	61	21	-65.4	40*	+90.5	60
Consumption	1,882	2,043	+8.6	2,000*	2.1	1,900
Exports	293	362	+23.4	400/ 420*	+10.5/ +16.0	400/ 440

*Estimates

1/ '000 head

2/ '000 tons

Paraguay

81. Cattle and calf numbers in Paraguay in 1982 were estimated at 6,300,000 head, about the same level as year-earlier. Bovine meat exports, until 1974 the main product exported by Paraguay (25 per cent of total exports in 1970), ceased completly in 1980 and 1981. In 1982, exports reached 1,320 tons and during the first quarter of 1983 they already totalled 1,075 tons and are said to have reached 4,300 tons in the first six months. Recent governmental measures to stimulate exports along with producers' efforts to increase export availabilities seem to be the main causes of this sharp increase. Paraguay's major bovine meat export destinations are the EC (38 per cent in the first half of 1983), Israel and Egypt.

Guatemala

82. In Guatemala, cattle and calf numbers totalled 2,700,000 head in 1981 and, according to projections, should reach 2,996,000 head in 1985. About 65 per cent of the cattle is raised for both dairy and beef purposes; 26 per cent is exclusively beef cattle. Production of beef and veal reached 57,000 tons in 1981, up by 9 per cent from year-earlier

but it appears to be below the 1970's levels. It is forecast that in the medium-term production should remain relatively stable. Guatemala exported 12,200 tons of bovine meat in 1981, 9 per cent above year-earlier, and expects to increase sharply its export volume to 23,500 tons in 1985. However, exports seem to have dropped significantly in 1982. Guatemala's main markets are certain Latin American countries and the United States.

Bulgaria

83. Cattle numbers in Bulgaria have shown a regular annual uptrend since 1970, totalling 1,807,000 head in 1982, an increase of some 44 per cent compared to 1970 and of 0.8 per cent compared to year-earlier. A large part of the herd (39 per cent in 1982) consists of dairy females. Production of bovine meat totalled 109,347 tons in 1982, up 8.3 per cent compared to year-earlier. Bovine meat production continued on its upward trend in the first three quarters of 1983, totalling 80,257 tons, 5.9 per cent more than year-earlier. Bulgaria is traditionally a veal producer and more than half of bovine meat production is that of veal. No recent figures for consumption are available but data from 1981 indicates a per capita consumption of 10.6 kgs. A traditional exporter, Bulgaria imports only small quantities of bovine meat (300 tons in 1982) most of which have been supplied by Mongolia in recent years. After a decrease of exports in 1982 due, it would seem, partly to access problems to certain traditional markets, exports of beef and veal in the three first quarters of 1983 increased by some 41 per cent compared to year-earlier, totalling 9,205 tons. Most of the meat exported was frozen. Exports of live cattle also increased from 6,197 tons to 7,809 tons in the three first quarters of 1983. A major part of the meat exported in 1983 went to Iran.

	1981	1982	% Change 1982/81	1983	% Change 1983/82	Forecast 1984
Cattle numbers 1/	1,792	1,807	+0.82	..		..
Beef and veal 2/:						
Production	101	109	+7.92	80*		..
Consumption	95	..		..		..
Exports	13	11	-20.90	9*		

*Three first quarters

1/ '000 head

2/ '000 tons

Hungary

84. Cattle and calf numbers in Hungary totalled 1,922,000 head at 1 January, 1983, 1.2 per cent less than year-earlier. Except for a small increase in 1981, cattle numbers in Hungary have been trending downward since 1979. The downtrend has mainly been the result of a decrease in dairy cow numbers. At 1 January, 1983, dairy cows constituted 39 per cent of total cattle and calf numbers in Hungary. Notwithstanding the recommencement of herd liquidation in Hungary during 1982, total cattle and calf slaughter decreased. Slaughter totalled 430,000 head, 0.3 per cent less than in 1981. This decrease in slaughter, when one would have expected a modest increase, is probably explained by a 40,000 head (28 per cent) increase in live cattle exports. Of total slaughter only 3,400 head were calves. Adult male cattle slaugher increased by 7.8 per cent, female slaughter decreased by 45.0 per cent. A 0.6 per cent increase in the average carcass weight of cattle slaughtered in 1982 offset the decline in slaughter. As a result beef production increased to 124,300 tons or by 0.9 per cent. A further more significant decrease in slaughter was projected for 1983, year in which it was estimated to total 387,100 head, 10 per cent less than in 1982. Notwithstanding an expected further increase in average carcass weights in 1983, production is expected to decrease significantly, by 9.7 per cent to 112,300 tons.

85. It is believed that cattle and beef prices in Hungary expressed in forints, were relatively stable relative to year-earlier in 1982. Expressed in US dollars prices declined significantly, but this is believed to be due to the significant devaluation of the forint (11 per cent in total during 1982 against a basket of 9 Western currencies). Hungarian beef producers receive a guaranteed price for each grade of cattle. The price for Class I heifer over 430 kgs, for example, was 34.50 forints per kg in 1982. Retail prices are subsidized and prices are fixed by the price board. Hungary's imports of bovine meat have been on a steady uptrend since 1978. In 1982 they reached 14,400 tons, 9.9 per cent more than year-earlier and over 3 times the import level of 1978. No live cattle or calves were imported in 1982, compared to 10,800 head in 1981. All imports in 1982 were from the EC, principally from the Federal Republic of Germany. The increase in imports is probably partly explained by the low prices existing on world markets. All imports were of fresh or chilled beef. Beef and veal consumption in Hungary totalled 107,000 tons in 1982 or 10.0 kgs per capita. This level of consumption was 10 per cent higher than in 1981; it was the first increase in consumption since 1979. For 1983 no change is foreseen in consumption levels either in total or per capita.

86. Hungary's exports of bovine meat increased by 6.2 per cent, to 54,600 tons in 1982. More substantial, however, was the increase in live cattle and calf exports. Live cattle exports totalled 187,000 head, 40,700 head or 27.8 per cent more than in 1981. Roughly 57 per cent of live cattle exports were to the Soviet Union, 60 per cent more than in 1981 while exports to Libya, the second largest market in 1981 declined by almost half (to 25,000 head). Exports to Lebanon were stable at 27,000 head. Hungary's export position was favoured in 1982

by the above-mentioned devaluation of the forint. The forint was devalued a further 4 per cent (in two stages) during early 1983. Exports in 1983 are expected to decrease by some 8.2 per cent to 50,100 tons due to the estimated decrease in production.

	1981	1982	% Change 1982/81	1983	% Change 1983/82	Forecast 1984
Cattle numbers 1/	1,918	1,945	+1.4	1,922	-1.2	..
Beef and veal 2/:						
Production	123	124	+0.9	112*	-9.7	106
Consumption	97	107	+10.3	107*	0	107
Imports	13	14	+9.9	12	-16.7	5
Exports	51	55	+6.2	50	-8.2	..

*Estimates

1/ '000 head at 1 January

2/ '000 tons

Poland

87. The cattle herd in Poland decreased again in 1983, after a slight upturn in 1982, reaching the lowest level since 1971. At the census in June 1983, the herd totalled 11,265,000 animals, of which 8,830,000 head were held in the private sector. More than half of the herd (5,774,000 head) were made up of cows. It is hoped that the increase in profitability resulting inter alia from a decline in prices of domestically supplied feedstuffs will induce producers to expand their herds soon and forecasts for 1984 suggest that the herd will total 12,200,000 head in June 1984 and 12,500,000 head in June 1985.

88. In the first half of 1983 total domestic supplies of beef and veal, originating in private and cooperative farms and destined for slaughter, amounted to 264,400 tons, 8 per cent below the corresponding figure for the same period of the preceding year. Excluded from this figure is the volume of slaughter outside the meat industry. This situation is largely related to a decrease in the number of livestock in the second half of 1982, when private producers, who are the principal suppliers of bovine meat, were decreasing their herd in response to insufficient availability of imported feedstuffs, and in reaction to the steep upward movement of meat prices on the domestic market. Preliminary estimates indicate that the total beef and veal output in 1983 may be some 17.8 per cent below the 1982 level (639,000 tons), that is some 525,000 tons. Tentative forecasts for 1984 suggest a possible slight upturn in production. This expectation is based on the previously mentioned trend towards a gradual stabilization of the total livestock number, on improved profitability factors and on a generally favourable crop outlook in 1983 with its positive consequences for supplies of feedstuffs from domestic sources.

89. Polish imports of beef and veal decreased sharply in 1982 and data for the first 6 months of 1983 suggest that this year will be another one of decreases in imports, since only 1,500 tons were imported between January and June 1983 compared to 7,000 tons the year before. Poland, a traditional beef exporter, has exported relatively little in the last couple of years, totalling only 6,900 tons in 1982 compared to 38,200 tons in 1979. Traditionally it exports at least as much live cattle (live weight) as meat. Exports appear to have picked up considerably in the first 6 months of 1983, totalling 21,400 tons (meat and cattle) compared to 11,000 tons the year before. In spite of production forecasts, an increase of 12.2 per cent in exports for the year as a whole is expected (34,900 tons), which would possibly indicate a decrease in consumption.

	1981	1982	% Change 1982/81	1983	% Change 1983/82	Forecast 1984
Cattle numbers 1/	11,797	11,912	+1.0	11,265	-5.4	12,200
Beef and veal 2/:						
Production	497	639	+28.6	525*	-17.8	..
Consumption	558	519	-7.0	..		..
Exports**	30	31	+3.0	35*	+12.2	..
Imports	89	7	-92.2	2*	-78.6	2

*Estimate

**Including live cattle

1/ '000 head, June/July

2/ '000 tons

Romania

90. Cattle and calf numbers in Romania totalled 6,246,100 head in February, 1983, 0.9 per cent less than year-earlier. This was the third year of reduced cattle and calf numbers. The decrease was almost entirely due to a reduction in dairy cow numbers (down 1.7 per cent). In 1982 slaughter totalled 1,237,500 head, a 9.3 per cent decrease from year-earlier. Production in 1982 decreased 11.8 per cent (to 196,300 tons, of which only a minor part was veal) compared to a year-earlier. Romania's imports of both beef and veal and of live cattle decreased substantially in 1982. Live cattle imports totalled only 1,500 head compared to 13,700 head in 1981, and 46,900 head in 1980. Imports of beef and veal, at 17,100 tons, were 67.1 per cent less than in 1981. Despite the 17 per cent decrease in beef and veal production in Romania in 1981, beef and veal consumption declined by only 7 per cent. Consumption totalled 244,400 tons or 11,0 kgs per capita. The reason for this more modest decrease was a sharp decrease in beef exports (of 40,000 tons), more than offsetting the decrease in imports. Figures for

1982 and 1983 consumption are not yet available but it could be assumed that consumption will be kept relatively stable with the help of greatly reduced exports. Romania's exports of beef and veal and of live cattle and calves declined sharply in 1982. Exports of beef and veal in 1982 totalled 17,300 tons compared to 34,900 tons in 1981, a decrease of 50.4 per cent. Exports of cattle and calves decreased even more (by 75.2 per cent) totalling 13,500 head compared to 54,400 head the year before.

	1981	1982	% Change 1982/81	1983	% Change 1983/82	Forecast 1984
Cattle numbers[1/]	6,485	6,303	-2.8	6,246*	-0.9	..
Beef and veal[2/]:						
Production	223	196	-11.8	..		..
Consumption	244	..		..		..
Imports	52	17	-67.1	..		..
Exports	35	17	-50.4	..		..

*February

1/ '000 head, January

2/ '000 tons

Yugoslavia

91. Cattle and calf numbers in Yugoslavia totalled 5,351,000 head at the census in January 1983, a decrease of 2.1 per cent compared to year earlier and the second consecutive annual decrease. Except for a temporary increase in 1981 cattle numbers have declined since 1975 (by 7.8 per cent). Most of the decrease occurred in steer numbers (-51.5 per cent). Total production of beef and veal amounted to 343,000 tons in 1982, an increase of 6.2 per cent on year-earlier. Although no figures are available, it could be assumed that a high proportion of total production is that of veal, Yugoslavia being a traditional consumer and exporter of veal. Yugoslavia imported some 30,200 tons of beef and veal in 1982, all of which was fresh and chilled, compared to 30,700 tons in 1981 and 55,450 tons in 1980. The only supplier was the EC where Italy supplied approximately half of the imported quantity. A traditional exporter of beef and veal (in particular of "baby beef"), Yugoslavia exported 48,300 tons of bovine meat in 1982 compared to 27,900 tons in 1981 and 50,100 tons in 1980. Most of the meat is exported fresh or chilled and the major markets in

1982 were Italy, the USSR, Jordan and Greece. Yugoslavia also traditionally exports live cattle and in 1982 her exports totalled 36,200 tons compared to 34,900 tons in 1981 and 18,610 tons in 1980. In 1982 most of the cattle was exported to Italy.

	1981	1982	% Change 1982/81	1983	% Change 1983/82	Forecast 1984
Cattle numbers[1/]	5,474	5,464	-0.2	5,351	2.1	..
Beef and veal[2/]:						
Production	323	343	+6.2	..	..	..
Consumption	327	..	..	..	..	..
Imports	31	30	-1.6	..	..	..
Exports	28	48	+73.1	..	..	..

1/ '000 head at 15 January

2/ '000 tons

Soviet Union

92. The return of more favorable weather conditions in the USSR in 1983 significantly improved the beef production situation. It should be noted that cattle herds (117,100,000 head at 1 January) came through the three preceding years of poor weather conditions intact, that is there had been no forced liquidation of herds. As a consequence, the improved feed conditions in 1983 did not imply any major changes as regards cattle inventory. On the other hand, there was a notable increase in the average carcass weights of slaughtered cattle in 1983, which can be attributed to better condition of cattle. During the first nine months of 1983 bovine meat production increased by 4 per cent relative to year-earlier; of this increase 80 per cent (or 3.2 percentage points) was due to increased carcass weights. For the year as a whole beef production was estimated at 6,865,000 tons. As regards feed supplies, it is estimated that roughage supplies per livestock unit in 1983 were between 10 and 20 per cent higher than in 1982.

93. The apparent increase in production in 1983 is believed to have reduced import requirements. Although it is as yet uncertain to what extent beef imports decreased, it is known that exports by most major suppliers to the Soviet Union decreased. Combined mutton and beef

imports declined by 9 per cent in 1982 to 592,400 tons of which an estimated 400,000 tons were beef. In 1983 beef imports are estimated at some 335,000 tons, a decrease of 16.3 per cent on year-earlier. Assuming a continuation of favorable weather conditions it is expected that the Soviet imports will decrease again in 1984. According to certain estimates the decrease could be large.

	1981	1982	% Change 1982/81	1983	% Change 1983/82
Cattle numbers 1/	115,057	115,900	+0.7	117,100	+1.0
Beef and veal 2/:					
Production 3/	6,600	6,600	0	6,865 4/	+4.0
Consumption 3/	6,971	6,970	0	7,170 4/	+2.9
Imports	452	400	-11.5	335 4/	-16.3

1/ '000 head at 1 January

2/ '000 tons

3/ Includes slaughter fat

4/ Estimates

IV. SUMMARY OF SITUATION IN CERTAIN FAR EASTERN, MIDDLE EASTERN AND NORTH AFRICAN BOVINE MEAT IMPORTING COUNTRIES

94. In recent years, North African, Middle Eastern and Far East Asian countries appeared as increasingly important markets for beef exporters. However, only limited information on these countries is available to the secretariat and the following paragraphs cover only those for which some information is available.

Far East

95. A certain number of Far East Asian countries remain some of the most buoyant markets for bovine meat. Growing incomes, the main reason for the upsurge of these countries as important new markets, continued to positively affect demand in 1982 and 1983.

Republic of Korea

96. Bovine meat production in the Republic of Korea declined by about 6 per cent in 1982, to 65,000 tons, while consumption increased by 12 per cent reaching 104,000 tons. Cattle numbers (estimated at 1,750,000 head in 1982) have been increasing but animal feeding problems are an obstacle to South Korean self-sufficiency in bovine meat. Although consumption appears to be very sensitive to economic conditions, demand for beef is rising, provoking higher import requirements. During the first eight months of 1983, Korea imported 44,050 tons (shipped weight) of beef and is likely to total around 63,130 tons for the year as a whole (compared to 71,600 tons in 1982), Australia being by far its major supplier. In order to reduce demand for imported beef, which is cheaper than the domestic beef, the South Korean Government has reportedly raised the retail price of imported beef. Efforts to stimulate the national industry are pursued and 50,000 head of breeding cattle should be imported in 1983 (30,000 head in 1982).

Malaysia

97. The cattle herd in Malaysia was estimated at 538,000 head in 1982, up 4.3 per cent on year-earlier level. Production of beef, which covers about 40 per cent of the demand, reached 14,000 tons. Per capita consumption is presently estimated at 2.3 kgs. Beef imports to West Malaysia and the province of Sarawak (which account for roughly 82 per cent of total beef imports) rose by 47 per cent to 11,248 tons in 1982, Australia being the major supplier with a market share of about 85 per cent, the other main suppliers being New Zealand and India. Since January 1983 Malaysia allows only the entry of meat from animals killed under the Islamic slaughter rites.

98. Since October 1982, Malaysian imports of beef have dropped sharply because of the entry of Indian buffalo meat on the market at much lower import prices. According to Malaysian statistics, of the 2,602 tons of bovine meat imported from January to April 1983, 1,844 tons, or 71 per cent, were Indian buffalo meat. As a consequence, during the first six months of 1983 Australian exports to West Malaysia fell by 48 per cent

to 1,262 tons, compared to the same period in 1982. If India is able to further increase its exports at current prices, the shift to buffalo meat could be accentuated. According to certain sources, in the medium-term Malaysia is expected to remain a growing market for meat in general and beef in particular. In spite of rising production, structural problems will keep domestic supply largely below demand which will probably increase in response to rising incomes.

Hong Kong

99. In Hong Kong, meat consumption figures for 1982, comprising 170,000 tons of pork, 132,000 tons of poultry and 44,000 tons of beef, clearly reflects the taste preferences of the population for pork and poultry. Although as a consequence, the market for pork is the most important one (47,000 tons imported in 1982, up 37 per cent on the 1981 level), beef and veal still account for some 25 per cent of total meat imports. Beef and veal imports have been increasing over the last few years and reached 21,761 tons in 1982, 17.6 per cent more than in 1981. China has the largest share of the market (41 per cent in 1982) followed by Australia (30 per cent) and New Zealand (13 per cent). Beef imports are generally of two types: first grade beef, for hotels and restaurants, and third grade beef catering to the rest of the market. The influence of western style foods, such as fast food, along with rising income may, in the long-term, provoke some rise in beef imports.

Singapore

100. Singapore imported 13,425 tons of beef and veal in 1982, 27 per cent more than in 1981. Australia was the main supplier with about 70 per cent, while New Zealand and the United States accounted for 24 per cent and 5 per cent respectively. Singapore re-exports part of its imports to other South East Asian markets. In 1982 beef and veal exports totalled 3,125 tons. Imports of cattle for slaughter from Australia increased by 60 per cent, to 1,566 head. As for other Asian countries, it is likely that rising incomes will reflect positively on the consumption of beef and veal in the medium-term.

China

101. Cattle and buffalo numbers in China reportedly totalled 76,100,000 head in 1982, about 4 per cent more than year-earlier. Beef production, which had declined in 1981, recovered in 1982 reaching 266,000 tons, 7 per cent higher than year-earlier. Beef is reportedly said to have accounted for 2 per cent of total red meat consumption in 1982, but might have been in short supply. Although China exports in particular relatively large quantities of pig and poultry meats, it also exports beef, virtually all to Hong Kong.

Middle-East

102. In general terms it can be said that this region is composed of two main types of markets. One type groups the Gulf States (Saudi Arabia, the United Arab Emirates, Kuwait and Qatar) and the other one the surrounding countries, principally Iraq, Iran, Syria, Jordan and Egypt. The Gulf States are characterized by a relatively small area with a small population, 10 to 12 million people. In real terms they represent a relatively small market. Production of all types of meat is limited. In spite of the high income levels, imports of beef which are basically in the hands of the private sector, may not show much growth in the near future because of the diminishing foreign work force which represented the largest share of consumers of imported meat. In addition, for budgetary reasons and in order to limit the frequent wastage of these meats, the authorities are imposing more stringent import requirements (such as labelling requirements, age of meat, consumption dates, etc.). Gulf States governments have also implemented very inexpensive loans to get their nationals back into agriculture. The surrounding countries represent a large area with a population exceeding 110 million people, and producing relatively large quantities of most meats. Although income levels are comparatively low, the market is very large in real terms and it can be expected that demand will increase continuously. Generally, in this group of countries, imports are controlled by various state organizations. There is a potential to increase meat production but seasonal and climatic conditions tend to offset efforts in this direction. National consumers order of preference for meat is sheepmeat (fresh, chilled and frozen), beef (fresh, chilled and frozen) and poultry (mostly frozen), the consumption of the latter rising rapidly. The Middle East being basically an Islamic area, pigmeat consumption is practically insignificant. The major traditional suppliers of beef to this region are South American countries, Australia and New Zealand and, more recently, the European Economic Communities. Indian exports of buffalo meat have increased significantly and represent a strong competition for other suppliers.

Saudi Arabia

103. Saudi Arabian imports of live cattle in 1982 reached 151,882 head, an increase of 15 per cent compared to 1981. However, the composition of these imports changed: imports of breeding cattle fell by 74 per cent while those of slaughter cattle increased by 21 per cent, representing a share of 98.6 per cent of total cattle imports. Somalia was the main supplier, followed by Sudan, and India. The ban on cattle imports from India for health reasons since April, 1982, benefited other suppliers, especially Australia, which became the fourth supplier. From January to March 1983, cattle imports increased by 35 per cent compared to the same period year-earlier. Imports of bovine meat totalled 51,968 tons in 1982, up 13 per cent from 1981. India and Australia were the main suppliers with market shares of 46 per cent and 26 per cent respectively. During the first quarter of 1983 imports of beef remained roughly at the same level as in the first quarter of 1982.

Qatar

104. In 1981, Qatar imported 2,020 tons of beef and buffalo meat. Ghana was the main supplier with about 25 per cent of overall bovine meat imports, while New Zealand and Australia supplied about one-fifth each. Demand for bovine meat in Qatar is chiefly for frozen minced meat, loins, knuckles, offals and frozen veal feet. Imports of cattle, including buffalo, reached about 58.2 tons, live weight, in 1981, India and Lebanon being the major suppliers. As other Middle East countries, trade in poultry and sheepmeat products is far more important than trade in cattle and beef. Thus, poultry meat imports (8,340 tons in 1981) reached two and a half times the combined volume of other meat imports, while imports of live sheep reached 8,460 tons, live weight.

Kuwait

105. Kuwaiti production of bovine meat, which in 1980 totalled 500 tons is forecast to increase and reach 2,593 tons in 1986. However, this quantity represents only about 12 per cent of demand and Kuwait will probably remain an interesting export market. Imports of beef and buffalo meat in Kuwait increased by 11.3 per cent in 1982, to 9,628 tons. India, which exports to the Kuwaiti market increased by 36 per cent, remained its largest supplier with a market share of roughly 50 per cent. Australia is the second main supplier, but its exports to this market fell by about 46 per cent in 1982, while the EC, Argentina and Brazil increased their market shares.

Bahrain

106. In 1982, Bahrain imported 3,580 tons of bovine meat, up 33 per cent from year-earlier. India became the largest supplier with a market share of 29 per cent, followed by Australia, 26 per cent (from 32 per cent in 1981), and New Zealand, 25 per cent. The EC share fell from 15 per cent in 1981 to 12 per cent in 1982. Imports of live cattle doubled.

North Africa

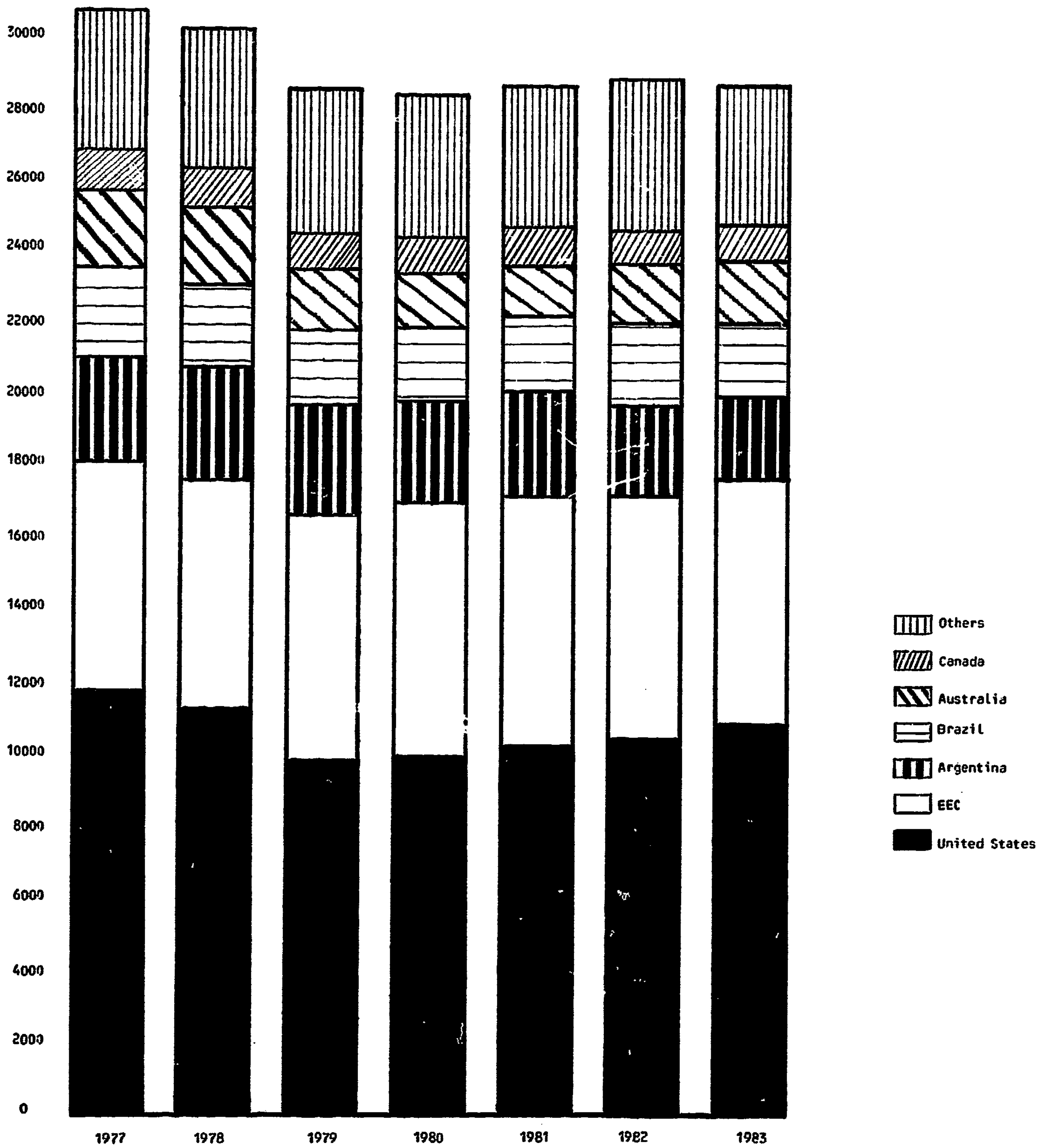
Libya

107. In 1982 Libya imported 20,000 tons of beef, mainly chilled, and 400,000 tons of live cattle. Domestic production, all meats combined, covers only about 10 per cent of consumption which is said to progress at a rythm of about 20 per cent a year. Importing programs are established at the end of each year for the following year. The 20,000 tons imported in 1982 were the result of contracts established with three EEC countries: Ireland, 10,000 tons; Italy, 7,000 tons and France, 3,000 tons.

APPENDIX

Beef and Veal Production in Countries

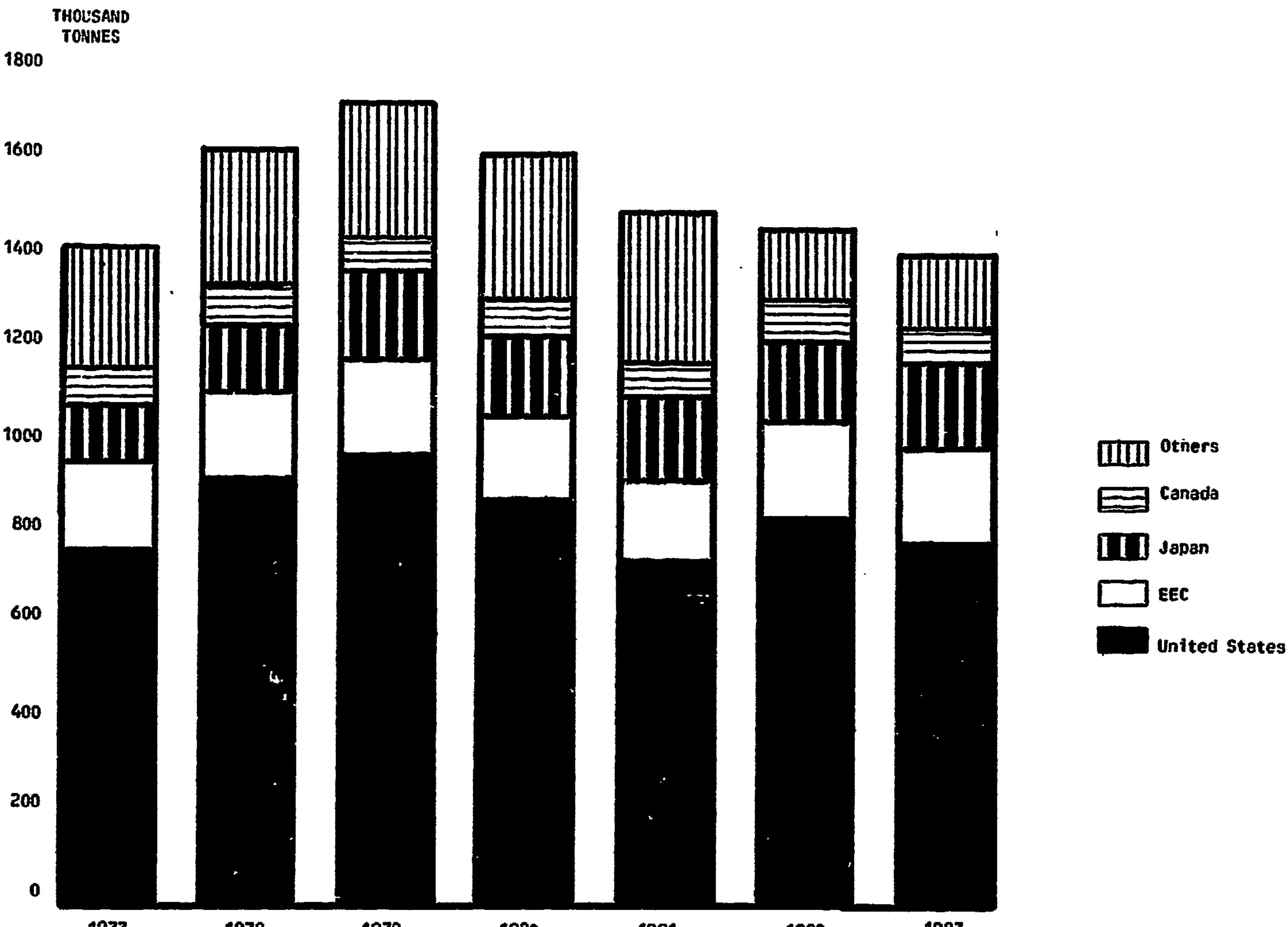
Participating in the Arrangement Regarding Bovine Meat*



*1983 estimated for all participants

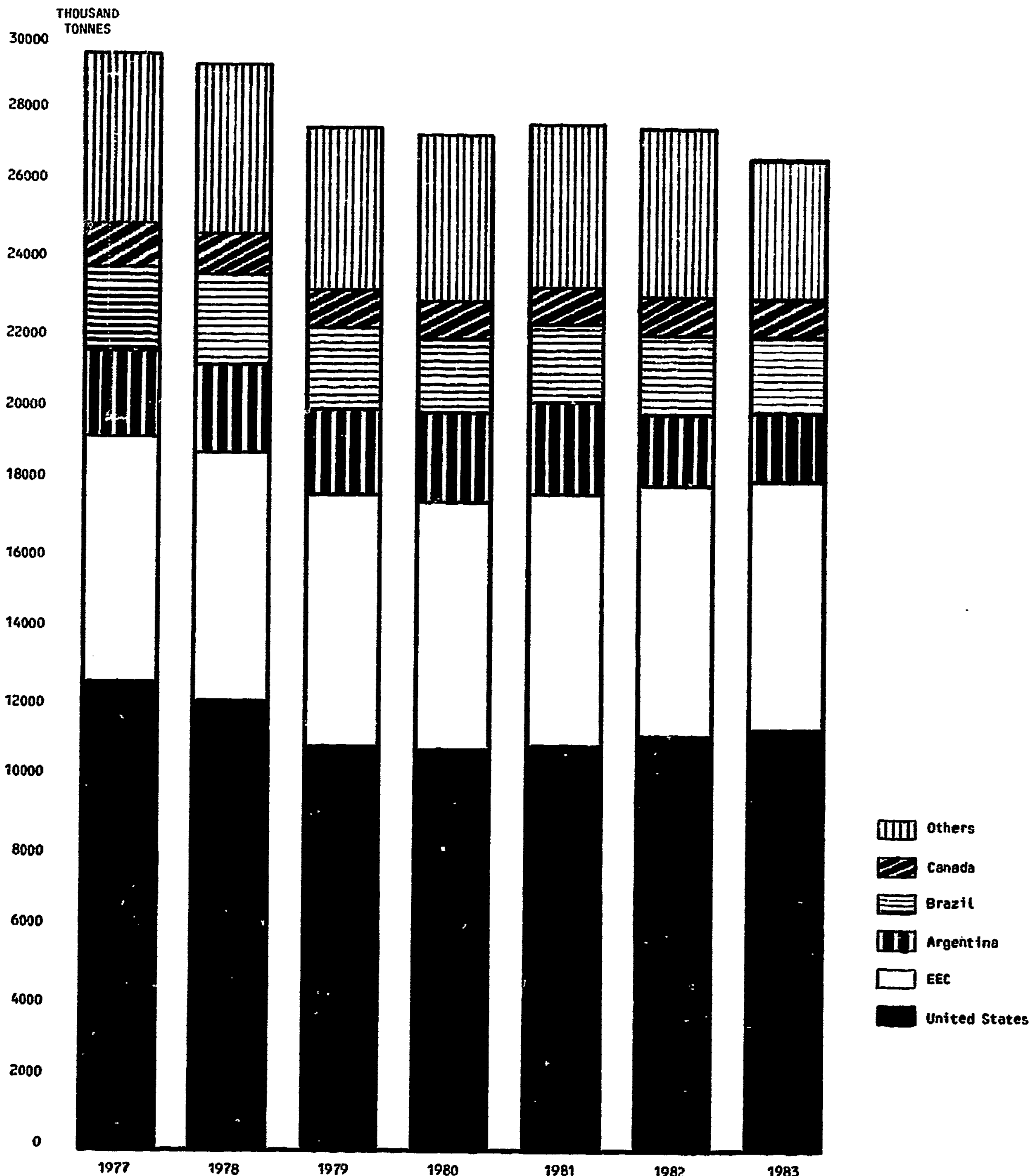
Imports of Fresh, Chilled and/or Frozen Beef and Veal by Countries Participating in the Arrangement Regarding Bovine Meat*

(Carcass Weight Equivalent)



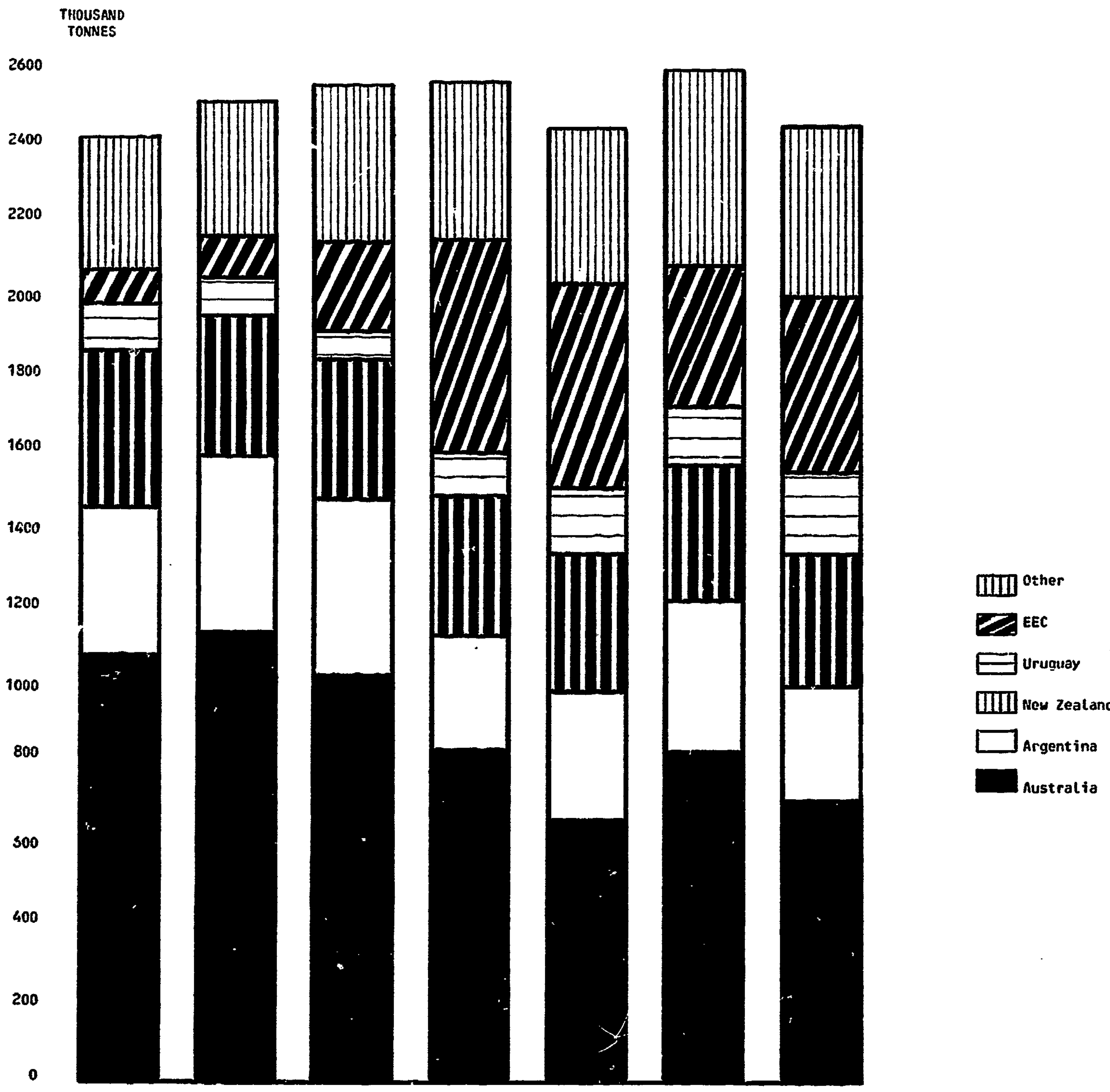
Beef and Veal Consumption in Countries

Participating in the Arrangement Regarding Bovine Meat*



*1983 estimated for all participants

Exports of Fresh, Chilled and/or Frozen Beef and Veal by Countries Participating in the Arrangement Regardir' Bovine Meat*



ANNEX

STATISTICAL TABLES

Table 1: Total cattle and calf numbers

Table 2: Cattle and calf slaughter

Table 3: Beef and veal production

Table 4: Stocks of beef and veal

Table 5: Consumption of beef and veal

Table 6: Imports of live cattle and calves

Table 7: Imports of fresh, chilled and/or frozen beef and veal

Table 8: Imports of beef and veal other than fresh, chilled and/or frozen

Table 9: Exports of live cattle and calves

Table 10: Exports of fresh, chilled and/or frozen beef and veal

Table 11: Exports of beef and veal other than fresh, chilled and/or frozen (canned, cooked, etc.)

Table 12: Beef prices:

- Average price received by producers
- Average retail price for beef

Table 13: Beef prices:

- Average or representative export prices
- Average or representative import prices

Symbols: The following symbols have been used in the summary tables:

... not available

- nil or negligible

Note: Figures have been rounded.

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

[illegible]ry	1979	1980	1981	1982	% Change 1982/81	Estimates 1983	% Change 1983/82	Forecast 1984	% Change 1984/83
ARGENTINA (30 June)	57,000	56,000	54,000	52,500	-2.8	53,000	+1.0	54,000	+1.9
of which cows	21,600	21,100	20,800	20,300	-2.4	20,500	+1.0	...	...
AUSTRALIA (31 March)	27,112	26,203	25,168	24,553	-2.4	22,471	-8.5	22,000	-2.1
of which cows	...	10,680	10,332	10,166	-1.6	9,297	-8.5	...	...
AUSTRIA (3 December of previous year)	2,594	2,548	2,517	2,535	+0.7	2,546	+0.4	...	...
of which cows[1]	1,238	1,214	1,213	1,220	+0.6	1,379	+13.0	...	...
BRAZIL (Estimates)	114,435	117,868	121,404	125,046	+[illegible].0	128,797	+3.0	...	...
of which cows	...	...	...	...	...	...	...	...	...
BULGARIA	1,763	1,778	1,792	1,807	+0.8	...	...	...	...
of which cows	716	710	711	706	-0.7	...	...	...	...
CANADA (1 January)	11,996	12,126	12,166	12,088	-0.6	11,598	-4.1	11,411	-1.5
of which cows	5,289	5,235	5,231	5,231	0	5,008	-4.3	4,935	-1.5
EEC (December of previous year)[2]	77,840	78,014	78,339	77,937	-0.5	78,791	+1.1	79,500	+0.9
of which cows	31,222	31,133	31,064	31,002	-0.2	31,351	+1.2	31,500	+0.5
FINLAND (15 December)	1,650	1,671	1,634	1,633	-0.1	1,600	-2.0	1,585	-0.9
of which cows	720	705	689	683	-0.9	577	-0.9	667	-1.5
HUNGARY (1 January)	1,966	1,950	1,918	1,945	+1.4	1,922	-1.2	...	...
of which cows	788	780	765	759	-0.8	751	-1.1	...	...
JAPAN (1 February)	4,150	4,248	4,385	4,485	+2.3	4,590	+2.3	...	...
of which cows	2,070	2,041	2,090	2,104	+0.7	2,140	+1.7	...	...
NEW ZEALAND (30 June)[3]	8,022	8,131	8,036	7,912	-1.5	7,438	-6.0	7,335	-3.8
of which cows	4,063	3,929	3,815	3,740	-3.5	...	...	...	...
NORWAY (20 June)	969	985	1,017	1,009	-0.8	1,004	-0.5	980	-2.4
of which cows	372	375	381	385	+1.0	...	...	...	...
POLAND (June)	13,036	12,648	11,797	11,912	+1.0	11,265	-5.4	12,200	+8.3
of which cows	6,049	5,956	5,757	5,835	+1.4	5,775	-1.0	5,800	+0.4
ROMANIA (January)	6,511	6,513	6,485	6,303	-2.8	6,246	-0.9	...	...
of which cows	3,186	3,188	3,188	3,0[illegible]0	-1.7	3,037	-1.7	...	...
SOUTH AFRICA (August)	8,726	8,293	8,353	8,445	+1.1	8,200	-2.9	8,350	+1.8
of which cows	3,960	3,839	3,981	4,066	+2.1	...	...	...	...
SWEDEN (June)	1,911	1,936	1,939	1,938	-0.1	1,911	-1.4	1,911	0
of which cows	724	727	732	731	-0.1	727	-0.5	726	-0.1
SWITZERLAND (April)	2,038	2,031	1,954	1,945	-0.5	1,919	-1.3	1,930	+0.6
of which cows	897	893	868	856	-1.4	842	-1.6	850	+1.0
TUNISIA	565	598	625	634	+1.4	601	-5.2	617	+2.7
of which cows	345	350	351	352	+0.3	334	-5.1	343	+2.7
UNITED STATES (1 July)	118,437	122,821	124,800	123,140	-1.3	123,540	+0.3	...	...
of which cows	47,815	49,941	51,004	49,930	-2.1	49,600	-0.7	...	...
URUGUAY (30 June)	10,299	11,173	11,421	11,237	-1.6	10,020	-10.8	9,296	-7.2
of which cows	4,037	4,371	4,359	4,091	-6.1	3,655	-10.7	3,483	-4.7
YUGOSLAVIA (15 January)	5,491	5,436	5,474	5,464	-0.2	5,351	-2.1	...	...
of which cows	3,134	3,091	3,087	3,079	-0.3	3,050	-0.9	...	...

[1] Includes beef heifers

[2] EEC of 10, from 1981

[3] Year ended 30 September

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

Country	1979	1980	1981	1982	% Change 1982/1981	Estimates 1983	% Change 1983/1982	Forecast 1984	% Change 1984/83
ARGENTINA - Adult cattle	13,389	12,406	13,000	10,920	-16	11,200[4]	-9.7[4]	11,000	-1.8
Calves	1,836	1,391	1,700	1,480	-13	...	...	...	...
AUSTRALIA - Adult cattle	8,261	7,371	6,692	7,779	+16.2	6,503	-16.4	6,300	-3.1
Calves	1,578	1,511	1,446	1,651	+14.2	1,395	-15.5	1,050	-24.7
AUSTRIA - Adult cattle	569	583	559	560	+0.2	...	...	...	...
Calves	216	202	193	196	+1.6	...	...	...	...
BRAZIL - Adult cattle	9,906	9,452	9,864	11,506	+16.6	7,357[6]	+2.9[6]	...	...
Calves	92	84	79	93	+17.7	60	+5.3	...	...
CANADA - Adult cattle	3,404	3,526	3,699	3,797	+2.6	3,840	+1.1	...	...
Calves	533	531	571	621	+8.8	535	-13.8	...	...
EEC[1] - Adult cattle	21,221	21,953	21,555	20,389	-5.4	20,905	+2.5	21,270	+1.7
Calves	7,090	6,880	6,667	6,676	+0.1	6,740	+1.0	6,900	+2.4
FINLAND - Adult cattle	527	544	579	555	-4.1	...	...	...	...
Calves	126	104	100	93	-7.0	...	...	...	...
HUNGARY[2] - Adult cattle	454	455	426	427	+0.2	385	-9.9	350	-9.0
Calves	7	6	6	3	0	2	-29.4	2	-8.3
JAPAN - Adult cattle	1,186	1,187	1,322	1,356	+2.6	649[7]	+3.7[7]	...	...
Calves	43	44	44	43	-2.3	22	+10.0	...	...
NEW ZEALAND[3] - Adult cattle	2,133	2,015	1,568	2,173	+38.6	2,155	-0.8	1,920	-10.9
Calves	1,074	965	974	1,031	+5.9	921	-10.7	1,020	+10.7
NORWAY[2] - Adult cattle	319	310	332	359	+8.1	...	...	...	...
Calves	31	30	28	54	+92.9	...	...	...	...
POLAND - Adult cattle	3,531	3,410	2,500	3,106	+24.2	...	...	...	...
Calves	1,310	1,445	1,438	1,659	+15.4	...	...	...	...
ROMANIA[2] - Adult cattle	1,535	1,366	1,312	1,238[4]	-9.3[4]	...	...	...	...
Calves	47	51	53	...	...	...	...	...	...
SOUTH AFRICA - Adult cattle	2,434	2,411	2,015	2,215	+9.9	2,270	+2.5	2,260	-0.4
Calves	151	137	89	95	+6.7	90	-5.3	90	0
SWEDEN - Adult cattle	551	574	584	607	+3.9	600	-1.2	600	0
Calves	112	115	117	111	-5.1	105	-5.4	105	0
SWITZERLAND[2] - Adult cattle	458	485	443	458	+3.4	431	-5.9	478	+9.4
Calves	392	397	375	375	0	352	-6.1	360	+2.3
TUNISIA[4] - Adult cattle	158	175	188	232	+23.4	208	-10.3	209	+0.5
Calves	...	...	...	...	...	...	...	...	...
UNITED STATES[5] - Adult cattle	33,678	33,807	34,953	35,843	+2.5	36,508	+1.9	35,095	-3.9
Calves	2,824	2,588	2,798	3,021	+8.0	3,015	-0.2	2,870	-4.8
URUGUAY[2] - Adult cattle	1,259	1,476	1,796	2,019	+12.4	2,046	+1.3	1,499	-26.7
Calves	103	115	186	200	+7.5	174	-13.0	125	-28.2
YUGOSLAVIA - Adult cattle	1,383	1,293	1,269	...	...	...	...	...	...
Calves	1,058	1,073	1,065	...	...	...	...	...	...

[1] EEC of 10, from 1981
[2] Inspected only
[3] Year ended 30 September
[4] Total slaughter
[5] Commercial slaughter
[6] First seven months, actual
[7] First six months, actual

TABLE 3 - Beef and Veal Production ('000 metric tons, carcass weight)

Country	1979	1980	1981	1982	% Change 1982/81	Estimates 1983	% Change 1983/82	Forecast 1984	% Change 1984/83
ARGENTINA - Beef	2,815	2,668	2,739	2,449	-10.6	2,220	- 6.0	2,220	0
Veal	205	158	190	150	-31.6	80	-38.5	80	0
AUSTRALIA - Beef		1,481	1,372	1,622	+18.2	1,359	-16.2	1,311	-3.5
Veal		52	49	57	+17.2	51	-10.2	39	-3.2
AUSTRIA - Beef	177	196	189	184	- 2.6	...	...	...	...
- Veal	16	15	17	16	- 5.9	...	...	...	...
BRAZIL[1] - Beef	2,114	2,083	2,115	2,385	+12.8	2,400	+0.6	2,400	0
- Veal	...	...	...	...	...	...	...	...	...
BULGARIA - Beef	38	38	35	37	+5.7	29[4]	...	...	...
- Veal	59	65	66	72	+9.1	52	...	...	...
CANADA - Beef	918	939	980	989	+0.9	1,018	+ 2.9	937	-8.0
- Veal	30	32	36	40	+11.1	42	+ 5.0	40	-4.8
EEC[2] - Beef	6,036	6,294	6,172	5,893	-4.5	6,075	+ 3.1	6,200	+2.1
- Veal	791	781	756	761	+0.7	775	+ 1.8	800	+3.2
FINLAND - Beef	108	112	120	115	-4.1	122[1]	+4.5[1]	...	...
- Veal	2	1.7	1.7	1.4	-13.3	...	...	...	...
HUNGARY - Beef	135	133	123	124	+0.9	112	- 9.7	106	-5.6
- Veal	0.3	0.2	0.1	0.1	0	0.1	0	0.1	0
JAPAN - Beef	400	416	468	479	+2.4	223[5]	+0.9[5]	...	...
- Veal	2	2	2	2	-	1.1	0	...	...
NEW ZEALAND[3] - Beef	491	479	481	496	+3.1	497	+0.2	445	-10.5
- Veal	21	17	17	20	+17.6	20	0	20	0
NORWAY[6] - Beef	69	67	74	77	+5.0	79[1]	-1.0[1]	75[1]	-3.1[1]
- Veal	1.9	1.9	1.7	2.8	+64.7	...	...	...	...
POLAND - Beef	656	626	453	583	+28.7	525[1]	-17.8[1]	...	...
- Veal	40	41	44	56	+27.3	...	...	...	...
ROMANIA - Beef	296	267	221	196[1]	-11.8[1]	...	...	...	...
- Veal	1.3	1.4	1.4	...	...	...	...	...	...
SOUTH AFRICA - Beef	663	631	513	595	+16.0	600	+0.8	550	-8.3
- Veal	6	6	4	3.9	- 2.5	4.5	+15.4	4	-11.1
SWEDEN - Beef	140	146	147	150	+2.0	148	-1.3	147	-0.7
- Veal	11	12	11	10	-9.1	10	0	9	-10.0
SWITZERLAND - Beef	122	128	117	122	+4.3	115	- 5.7	133	+15.7
- Veal	39	40	37	38	+2.7	36	- 5.3	36	0
TUNISIA - Beef	32	33	33	33	0	35	+ 6.1	36	+2.9
- Veal	-	-	-	-	-	-	-	-	-
UNITED STATES - Beef	9,728	9,818	10,355	10,425	+ 0.7	10,705	+2.7	10,113	-5.5
- Veal	197	181	198	203	+ 2.5	202	- 0.5	190	-5.9
URUGUAY[1] - Beef	268	323	398	407	+ 2.3	435	+6.9	323	-25.7
- Veal	...	...	...	...	...	...	...	...	...
YUGOSLAVIA[1] - Beef	341	335	323	343	+ 6.2	...	...	...	...
- Veal	...	...	...	...	...	...	...	...	...

[1] Total production, beef and veal. Breakdown not available

[2] EEC of 10 from 1981

[3] Year ended 30 September

[4] First nine months, actual

[5] First six months, actual

TABLE 4 - Stocks of Beef and Veal ('000 metric tons, carcass weight)

Country	1979	1980	1981	1982	% Change 1982/81	Estimates 1983	% Change 1983/82	Forecast 1984	% Change 1984/83
ARGENTINA	56	35	68	66	- 2.9	55	-16.7	55	0
AUSTRALIA[1]	54.1	46.1	44.4	32.7	-26.4	34.7[4]	...	...	...
AUSTRIA	5	5	5	4	-20.0	...	...	...	...
BRAZIL	214	202	263	204	-22.4	45	-77.9	120	+166.7
CANADA[2]	25.1	31.2	31.8	20.2	-36.5	16.6	-17.8	18.0	+8.4
EEC[3]	360	400	235	255	+8.5	425	+66.7	400	-5.9
FINLAND	3.9	7.2	5.6	7.6	+35.7	5.7	-25.0	10.0	+75.4
HUNGARY	4.6	1.7	1.3	1.4	+7.7	1.3	- 7.1	1.3	...
NORWAY	0.8	0.9	7.4	6.2	-16.2	...	...	...	...
SOUTH AFRICA	0.2	1.2	1.3	4.5	+246.2	4.0	-11.1	...	...
SWEDEN	5	8	13	6	-53.8	4	-33.3	4	0
SWITZERLAND	11.1	10.6	3.5	3.1	-11.4	3.4[4]	...	2.0	...
UNITED STATES	167.8	103.0	109.3	115.6	+ 5.8	136.5	+18.1	128.8	-5.6
URUGUAY	16	21	19	26	+36.8	52[4]	...	...	...

[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. The figure for 1983 is actual.

[3] EEC of 10, from 1981

[4] Stocks at the end of June, actual

Note: Stocks at the end of the year, if not otherwise specified.

TABLE 5 - Beef and Veal Consumption ('000 metric tons, carcass weight and kg./capita)

Country		1979	1980	1981	1982	% Change 1982/81	Estimates 1983	% Change 1983/82	Forecast 1984	% Change 1984/83
ARGENTINA	- Total	2,322	2,391	2,410	2,059	-14.6	1,915	-7.0	1,910	-0.3
	- per capita	85.0	86.0	85.0	71.0	-16.5	65.0	-8.5	64.0	-1.5
AUSTRALIA	- Total	731	657	713	755	+5.9	662	-12.3	...	...
	- per capita	50.6	44.6	47.4	49.7	+4.9	43.5	-12.5	43.0	-1.1
AUSTRIA	- Total	188	189	184	...	...	...	...	...	...
	- per capita	24.9	25.1	24.5	...	...	...	...	...	...
BRAZIL	- Total	2,099	1,960	1,882	2,043	+8.6	2,000	-2.1	1,900	-5.0
	- per capita	18.1	16.4	15.4	16.3	-0.6	16.0	-1.8	...	...
BULGARIA	- Total	...	88	95	...	...	...	...	...	...
	- per capita	...	9.2	10.6	...	...	...	...	...	...
CANADA	- Total	982	985	1,030	1,037	+0.7	1,037	0	1,021	-1.5
	- per capita	41.3	40.9	42.5	42.1	-0.9	42.1	0	41.4	-1.7
EEC[1]	- Total	6,790	6,747	6,770	6,603	-2.5	6,630	+0.4	6,695	+1.0
	- per capita	26.0	25.8	25.0	24.4	-2.4	24.4	0	24.6	+0.8
FINLAND	- Total	112	111	106	107	+0.9	110	+2.8	...	...
	- per capita	23.4	23.3	22.1	22.3	+0.9	21.9	-1.8	...	...
HUNGARY	- Total	97	97	97	107	+10.3	107	0	107	0
	- per capita	9.1	9.1	9.1	10	+9.9	10	0	...	...
JAPAN	- Total	590	595	647	658	+1.7	314[3]	+4.7[3]	...	...
	- per capita	5.1	5.1	5.5	5.5	0	2.6	0	...	...
NEW ZEALAND[2]	- Total	167	151	148	155	+4.7	153	-1.3	153	0
	- per capita	52.9	47.6	46.3	48.5	+4.8	48.0	-1.0	47.7	-0.6
NORWAY	- Total	80	81	71	75	+5.6	74	-1.3	70	-5.4
	- per capita	19.6	19.8	17.2	...	...	...	...	...	...
POLAND	- Total	605	659	558	519	-7.0	...	...	...	...
	- per capita	17.2	18.2	15.6	14.3	-8.3	...	...	...	...
ROMANIA	- Total	250	263	244	...	...	...	...	...	...
	- per capita	11.4	11.8	11.0	...	...	...	...	...	...
SOUTH AFRICA	- Total	673	666	599	649	+8.3	664	+2.3	678	+2.1
	- per capita	24.4	23.9	20.2	20.5	+1.5	...	...	...	...
SWEDEN	- Total	152	151	143	141	-1.4	144	+2.1	133	-7.6
	- per capita	18.0	18.0	17.2	17.0	-1.2	17.3	+1.8	16.0	-7.5
SWITZERLAND	- Total	166	178	179	176	-2.0	168	-4.4	180	+7.1
	- per capita	25.8	27.5	27.6	26.8	-2.9	25.8	-3.7	27.4	+6.2
TUNISIA	- Total	37	38	48	50	+3.1	55	+11.1	59	+7.5
	- per capita	4.6	4.5	6.2	6.8	+9.7	7.1	+4.4	7.4	+4.2
UNITED STATES	- Total	10,872	10,674	11,083	11,190	1.1	11,331	+2.1	10,905	-3.8
	- per capita	48.8	47.2	48.2	48.2	0	48.7	+1.0	46.5	-4.5
URUGUAY	- Total	188	206	225	238	+5.8	220	-7.6	222	+0.9
	- per capita	66.0	72.0	78.0	81.0	+3.8	74	-8.6	74	0
YUGOSLAVIA	- Total	314	302	327	...	...	...	...	...	...
	- per capita	14.8	14.1	15.1	...	...	...	...	...	...

[1] EEC of 10, from 1981

[2] Year ended 30 September

[3] First six months, actual

TABLE 6 - Imports of Live Cattle and Calves[1] ('000 Head)

(Carcass weight equivalent where available appears in brackets in '000 metric tons)

Country	1979	1980	1981	1982	% Change 1982/81	Estimates 1983	% Change 1983/82	Forecast 1984	% Change 1984/83
BRAZIL	152 (27.6)	25 (5.1)	... (3.3)	... (2.3)	... (-30.3)	- (-)	... (...)	... (...)	... (...)
CANADA	22 (5.9)	64 (16.8)	156 (41.2)	79 (20.6)	-49.4 (-51.0)	90 (23.5)	+13.9 (+14.1)	100 (26.5)	+11.1 (+12.8)
EEC[2]	451 (73.0)	361 (59.0)	311 (50.0)	488 (66.0)	+56.9 (+32.0)	475 (60.0)	-2.7 (-9.0)	400 (55.0)	-15.8 (-8.3)
HUNGARY	-	-	10.8 (1.7)	-	-100.0 (-100.0)	16.3 (4.1)	- -	... (...)	... ...
JAPAN	14 (4.0)	13.6 (4.0)	13.3 (4.0)	4.5 (1.0)	-66.2 (-75.0)	3.7[3] (...)	... (...)	... (...)	... (...)
ROMANIA	25.2 (7.2)	46.9 (11.7)	13.7 (4.8)	1.5 (0.4)	-89.1 (-91.7)	... (...)	... (...)	... (...)	... (...)
SOUTH AFRICA	134 (27.2)	134 (26.3)	343 (71.6)	191 (59.5)	-44.3 (-44.8)	175 (...)	-8.4 (...)	170 (...)	-2.9 (...)
SWITZERLAND	4.7 (0.7)	4.5 (0.7)	7.0 (1.3)	4.5 (0.8)	-35.7 (-38.5)	5.0 (0.8)	+11.1 (0)	4.7 (0.7)	-6.0 (-12.5)
TUNISIA	10.1 (4.7)	10.8 (4.8)	41.7 (9.6)	45.1 (11.1)	+8.2 (+15.6)	54 (13.5)	+19.7 (+21.6)	30 (7.5)	-44.4 (-44.4)
UNITED STATES	732 (...)	681 (...)	659 (...)	1,005[4] (...)	+52.5 (...)	725.6 (...)	+7.3[5] (...)	... (...)	... (...)
YUGOSLAVIA	... (0.1)	... (0.1)	-	-	-	... (...)	... (...)	... (...)	... (...)

[1]Excluding breeding cattle
[2]EEC of 10, from 1981
[3]First six months, actual
[4]Preliminary
[5]First nine months

TABLE 7 - Imports of Fresh, Chilled/and/or Frozen Beef and Veal
('000 metric tons carcass weight equivalent)

Country	1979	1980	1981	1982	% Change 1982/81	Estimates 1983	% Change 1983/82	Forecast 1984	% Change 1984/83
AUSTRALIA	1.5	3.1	2.8	3.2	+14.3	2.3[2]	...	...	...
AUSTRIA	11	10	12	9	-25.0	3[2]	...	...	...
BRAZIL	113.5	65.3	60.6	21.0	-65.4	40.0	+90.5	60.0	+50.0
BULGARIA	1.5	4.7	1.6	0.2	-87.5	...	...	...	...
CANADA	76.8	72.7	73.0	77.4	+6.0	75.0	-3.1	78.0	+4.0
EEC[1]	204	175	176	236	+34.1	235.0	-0.4	225.0	-4.3
FINLAND	-	2	-	-	-	-	...	...	...
HUNGARY	6.4	10.4	12.9	14.3	+10.9	11.0	-23.1	5.0	-54.5
JAPAN	188	177	177	175	-1.1	185.0[3]	+[illegible].1[3]	190.0[3]	+2.7[3]
NORWAY	8.7	12.5	3.8	1.1	-71.1	1.0	-9.1	...	...
POLAND (frozen only)	1.8	35.0	89.0	6.3	-92.9	1.5[3]	-78.6[3]	...	...
ROMANIA	51.1	69.4	52.0	17.1	-67.1	...	...	...	...
SOUTH AFRICA	9.8	10.7	19.9	19.6	-1.5	19.0	-3.1	18.5	-2.6
SWEDEN	15.3	11.3	4.6	5.9	+28.3	6.2	+5.1	4.0	-35.5
SWITZERLAND	11.9	7.4	11.1	9.2	-17.3	9.9	+7.6	8.0	-19.2
TUNISIA	3.7	0.5	5.5	4.8	-13.6	8.9	+87.4	13.0	+46.1
UNITED STATES[4]	710.2	641.3	544.1	607.2	+11.6	471.3[5]	-4.2[5]	...	...
YUGOSLAVIA	47.8	55.5	30.7	30.2	-1.6	...	...	...	...

[1] EEC of 10, from 1981
[2] First six months, actual
[3] Including canned, cooked, etc.
[4] Product weight
[5] First nine months

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

(Canned, Cooked, etc.)

('000 metric tons, carcass weight equivalent)

Country	1979	1980	1981	1982	% Change 1982/81	Estimates 1983	% Change 1983/82	Forecast 1984	% Change 1984/83
AUSTRALIA[1]	1.4	0.6	0.6	0.4	-33.3	0.2[3]	...	...	...
BRAZIL	0.6	0.3	0.3	-	-100.0	-	0	...	...
BULGARIA	-	0.1	-	0.1	-	...	...	...	...
CANADA	10.3	8.0	7.7	10.8	+40.3	10.6	-1.9	10.3	-2.8
EEC[2]	135	122	138	138	0	140	+1.4	140	0
HUNGARY	-	-	0.2	0.1	-50.0	1.0	+900.0	-	-100.0
JAPAN	1	1	1	1	0	.[3]	...	...	...
POLAND	0.2	0.9	0.4	0.7	+75.0	0.6[3]	...	...	...
SWEDEN	2.8	1.3	0.2	0.4	+100.0	0.4	0	0.3	-25.0
SWITZERLAND	1.9	2.2	2.1	2.1	0	2.4	+14.3	2.0	-16.7
UNITED STATES[4]	77.8	61.5	58.7	55.1	-6.1	59.6[5]	+47.3[5]	...	...
URUGUAY	-	-	-	8.0	-	8.0	0	-	-100.0

[1] Includes canned corned beef, canned steak and kidney.

[2] EEC of 10, from 1981

[3] First six months, actual

[4] Product weight

[5] First six months

TABLE 9 - Exports of Live Cattle and Calves[1]

('000 head; carcass weight equivalent where available, appear in brackets in '000 metric tons)

Country	1979	1980	1981	1982	% Change 1982/81	Estimates 1983	% Change 1983/82	Forecast 1984	% Change 1984/83
ARGENTINA	11.3 (2.0)	-	-	-	0	-	0	...	...
AUSTRALIA	54.9 (11.0)	64.2 (12.8)	59.4 (11.9)	62.8 (12.0)	+5.7 (+0.8)	70 (14.0)	+11.5 (+16.7)	65 (13.0)	-7.1 (-7.1)
AUSTRIA	49 (30)	34 (21)	26 (16)	20 (12)	-23.1 (-25.0)	11[4] (7)	... (...)	... (...)	... (...)
BULGARIA	7.5 (3.1)	0.9 (0.4)	5.0 (2.2)	25.6 (11.1)	+412.0 (+405.0)	18.6 (7.8)	-27.3 (-29.7)	... (...)	... (...)
CANADA	142 (37.6)	153 (40.4)	133 (35.0)	223 (57.6)	+67.7 (+64.6)	240 (62.4)	+7.6 (+8.3)	150 (39.0)	-37.5 (-37.5)
EEC[2]	164 (37)	273 (67)	401 (100)	342 (88)	-14.7 (-12.0)	350 (90)	+2.3 (+2.3)	350 (90)	0 (0)
FINLAND	-	-	1 (...)	-	-100.0 (...)	-[3]	... (...)	... (...)	... (...)
HUNGARY	204 (62.7)	132 (37.4)	146 (42.8)	187 (54.5)	+28.1 (+27.3)	185.0 (543)	-1.1 (-0.4)	... (...)	... (...)
POLAND	251 (38.4)	260 (40.6)	144 (22.1)	230 (24.2)	+59.7 (+9.5)	147[4] (15.8)	... (...)	... (...)	... (...)
ROMANIA	87.4 (17.9)	64.9 (13.0)	54.4 (11.3)	13.5 (3.0)	-75.2 (-73.5)	... (...)	... (...)	... (...)	... (...)
UNITED STATES	66 (...)	66 (18.6)	88 (...)	57 (...)	-35.2 (...)	39.1[3] (...)	-15.6[3] (...)	... (...)	... (...)
YUGOSLAVIA	... (19.6)	... (18.6)	... (...)	... (36.2)	... (...)	... (...)	... (...)	... (...)	... (...)

[1] Excluding breeding cattle
[2] EEC of 10, from 1981
[3] First nine months, actual
[4] First six months, actual

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

('000 metric tons carcase weight equivalent)

Country	1979	1980	1981	1982	% Change 1981/82	Estimates 1983	% Change 1983/82	Forecast 1984	% Change 1984/83
ARGENTINA	453	298	328	359	+9.5	295	-17.8	300	+1.7
AUSTRALIA	1,041	846	682	918	+34.6	720	-21.6	683	-5.1
AUSTRIA	16	19	18	23	+27.8	13[3]	...	...	...
BRAZIL	3.5	7.6	61.8	124.6	+101.6	410[4]	+13.4[4]	420[4]	+2.4[4]
BULGARIA	9.3	18.1	13.4	10.6	-20.9	9.2[5]	...	...	...
CANADA	48	61	75	79.5	+ 6.0	83.4	+4.9	78	-6.5
EEC[1]	231	545	524	355	-32.3	450	+26.8	450	0
FINLAND	-	1	15	7	-53.3	20	+185.7	25	+25.0
HUNGARY	46	49	45	48.2	+7.1	46	-4.6	...	...
NEW ZEALAND[2, 6]	229	225	226	234	+3.5	233	-0.4	200	-14.2
NORWAY	0.1	0.1	1.1	4.7	+327.3	6[4]	0[4]	...	...
POLAND	27.6	23.7	5.3	3.8	-28.3	3.4[3]	...	...	...
ROMANIA	97.9	66.0	25.0	12.4	-50.4	...	...	...	...
SOUTH AFRICA	10.7	7.4	0.6	-	-100.0	3.0	-	4.0	+33.3
SWEDEN	19.3	11.7	12.7	33.6	+164.6	22.5	-33.0	26.5	+17.8
SWITZERLAND	0.2	2.9	-	0.8	-	0.7	-12.5	1.0	+42.9
UNITED STATES[6]	53.8	55.0	68.6	78.8	+14.8	64.3[5]	+16.1[5]	...	...
URUGUAY	74.0	113	166	161	-3.0	206	+28.0	95	-53.9
YUGOSLAVIA	45.3	57.9	21.4	43.8	+104.7	...	...	...	...

[1] EEC of 10, from 1981

[2] Year ended 30 September

[3] First six months, actual

[4] Including canned, cooked, etc.

[5] First nine months, actual

[6] Product weight

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

('000 metric tons carcass weight equivalent)

Country	1979	1980	1981	1982	% Change 1982/81	Estimates 1983	% Change 1983/82	Forecast 1984	% Change 1984/83
ARGENTINA	244	171	158	163	+3.2	130	-20.2	120	-7.7
AUSTRALIA	46	32	28	24	-14.3	32	+33.3	31	-3.1
BRAZIL	125	181	231	237	+2.6	179[2]	...	...	...
CANADA	2.4	3.5	2.7	2.4	-11.1	2.0	-16.7	2.0	0
EEC[1]	70	30	38	38	0	40	+5.3	40	0
HUNGARY	3.5	3.1	6.4	6.4	0	4.1	-35.9	...	...
NORWAY	0.3	0.6	0.5	1.1	+120.0	...	...	...	...
POLAND	10.6	8.5	2.8	3.1	+10.7	2.2[3]	...	...	...
ROMANIA	12.9	9.3	9.9	4.9	-50.5	...	...	...	...
SWEDEN	0.6	1.1	0.2	0.8	+300.0	0.5	-37.5	0.5	0
SWITZERLAND	1.2	0.4	0.6	0.5	-16.7	0.4	-20.0	0.5	+25.0
UNITED STATES[4]	3.6	4.5	6.1	6.9	+13.6	4.6[5]	-18.0[5]	...	...
URUGUAY	6	4	7	8	+14.3	9	+12.5	6	-33.3
YUGOSLAVIA	4.8	4.1	6.5	4.5	-30.8	...	...	...	...

[1] EEC of 10, from 1981
[2] First seven months, actual
[3] First six months, actual
[4] Product weight
[5] First nine months

TABLE 12 - Beef prices - Average Price received by Producers
- Average Retail Price for Beef (in brackets)

Country	1979	1980	1981	1982	% Change 1982/81	Estimates 1983	% Change 1983/82
ARGENTINA (US$/100 kg.)	92 (318)	99 (406)	75 (330)	74 (305)	-1.3 (-7.6)	70[4] ...	... ...
AUSTRALIA (Australian cents/kg.)	165 (641)	167 (720)	144 (739)	113 (633)	-21.5 (-14.3)	152[4] (626)	... (...)
AUSTRIA (S/100 kg.)	1,989 (11,300)	2,085 (11,800)	2,293 (13,200)	2,434 (14,100)	+6.1 (+6.8)	... (...)	... (...)
BRAZIL (US$/100 kg.)	55 (216)	48 (395)	34 (671)	29 (1,214)	-14.7 (+80.9)	31[5] (2,531)	... (...)
CANADA (US$/100 kg.)	119 (640)	114 (715)	106 (698)	96 (690)	-9.4 (-1.1)	119[4] (652)	... (...)
EEC[1] (ECU/100 kg.)	131 (...)	131 (...)	145 (...)	160 (...)	+10.3 (...)	162 (...)	+1.3 (...)
FINLAND (US$/100 kg.)	368 (580)	435 (699)	411 (674)	412 (686)	+0.2 (+1.8)	388[4] (641)	... (...)
HUNGARY (US$/100 kg.)	97 (117)	120 (147)	123 (157)	109 (146)	-11.1 (+7.1)	101 (125)	-7.8 (-14.3)
JAPAN (US$/100 kg.)	252 (1,431)	235 (1,480)	208 (1,516)	188 (1,367)	-9.6 (-9.8)	200[4] (1,483)	... (...)
NEW ZEALAND[2] ($NZ/100 kg.)	111 (455)	108 (555)	107 (611)	125 (683)	+16.8 (+11.8)	125 (...)	0 (...)
NORWAY (US$/100 kg.)	457 (723)	483 (826)	467 (895)	430 (867)	-7.9 (-3.1)	... (...)	... (...)
POLAND (Zl/kg.)	31 (80)	32 (80)	55 (80)	90 (250)	+63.6 (+212.5)	96[4] (250)	... (...)
SOUTH AFRICA (Rand/100 kg.)	131.2 (301.9)	210.9 (440.8)	244.2 (544.2)	191.8 (481.5)	-21.5 (-11.5)	208.7[4] (540.9)	... (...)
SWEDEN (US$/100 kg.)	359 (756)	389 (850)	353 (1,101)	306 (1,015)	-13.3 (-7.8)	26[illegible][3] (90[illegible])	... (...)
SWITZERLAND (SwF/100 kg.)	511 (1,533)	491 (1,535)	533 (1,616)	547 (1,722)	+2.6 (+6.6)	555[4] (1,741)	... (...)
TUNISIA (US$/100 kg.)	268 (341)	268 (365)	292 (405)	265 (366)	-9.2 (-9.6)	275 (310)	+3.8 (-15.3)
UNITED STATES (US$/100 kg.)	146 (499)	138 (524)	129 (526)	126 (535)	-2.3 (+1.7)	... (...)	... (...)
URUGUAY (US$/100 kg.)	129 (183)	129 (191)	109 (184)	83 (135)	-23.9 (-26.6)	64[4] (77)	... (...)
YUGOSLAVIA (US$/100 kg.)	50 (63)	64 (83)	90 (114)	115 (152)	+27.8 (+33.3)	... (...)	... (...)

[1] EEC of 10, from 1981
[2] Year ended 30 September
[3] First nine months, actual
[4] First six months, actual
[5] First seven months, actual

Note: See notes on pages 69-70

TABLE 13 - Beef Prices - Average or Representative Export Prices (f.o.b.)
- Average or Representative Import Prices (c.i.f.) (in brackets)

(US$/100 kg.)

Country	1979	1980	1981	1982	% Change 1982/81	Estimates 1983	% Change 1983/82
ARGENTINA	175	207	183	139	-24.0	132[4]	...
AUSTRALIA (Price Index)	161 (274)	171 (375)	162 (306)	138 (251)	-14.8 (-18.0)	148[2] (243)	... (...)
AUSTRIA (S/100 kg.)	3,457 (3,039)	3,855 (2,514)	4,602 (2,482)	4,583 (5,146)	-0.4 (+107.3)	... (...)	... (...)
BRAZIL	119 (140)	139 (139)	150 (135)	121 (109)	-19.3 (-19.3)	115[1] (-)	... (...)
CANADA	238 (260)	224 (259)	202 (239)	208 (216)	(+3.0) (-9.6)	195[2] (226)	... (...)
EEC[3] (ECUs/ton)	1,404 (...)	1,382 (...)	1,400 (...)	1,400 (...)	0 (...)	1,400 (...)	0 (...)
HUNGARY	180 (96)	217 (97)	206 (113)	168 (121)	-18.3 (+7.0)	160 (143)	-4.8 (-18.2)
JAPAN	(311)	(354)	(325)	(322)	(-0.9)	(338)[2]	(...)
NORWAY	369 (272)	499 (279)	227 (277)	541 (292)	+138.3 (+5.4)	... (...)	... (...)
POLAND	195 (151)	219 (120)	225 (135)	187 (93)	-16.9 (-31.1)	181[2] (-)	... (...)
SWEDEN	160 (297)	220 (348)	195 (358)	151 (344)	-22.6 (-3.9)	162[2] (260)	... (...)
SWITZERLAND	(292)	(467)	(418)	(305)	(-27.0)	(325)[2]	(...)
TUNISIA	(243)	(260)	(275)	(187)	(-32.0)	(250)	(+33.7)
UNITED STATES	413 (289)	427 (276)	... (...)	... (...)	... (...)	... (...)	... (...)
URUGUAY	146	148	145	127	-12.4	114[2]	...

[1] First seven months, actual
[2] First six months, actual
[3] EEC of 10, from 1981
[4] First nine months, actual

Note: See notes on pages 69-70

NOTES ON TABLES 12 and 13

	AVERAGE PRICE RECEIVED BY PRODUCERS	AVERAGE RETAIL PRICE FOR BEEF	AVERAGE OR REP. EXPORT PRICE	AVERAGE OR REP. IMPORT PRICE
ARGENTINA	Steer, live weight, Buenos Aires	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 States' capital cities	"Beef" component of the Export Price Index. Base year 1974/75 = 100. Main ports of shipment, Australia	Bovine meat
AUSTRIA	Average domestic price of 100 kg. of slaughter cattle	Average retail price of frozen boneless 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 counties of State of Sao Paulo	Annual average for rumpsteak	Carcass weight equivalent - in current dollars	Carcass weight equivalent - in current dollars (including live cattle)
BULGARIA	...	...	...	...
CANADA	All slaughter cattle, Canada	Consumer Price Index-Beef, 1971 = 100	Frozen boneless beef	Frozen boneless beef
EUROPEAN ECONOMIC COMMUNITY	Market price (wholesale) 100 kg. live weight	...	Free-at-Community-frontier offer price	...
FINLAND	...	...	...	...
HUNGARY	Adult live cattle in live weight	Compensated carcass beef	Compensated carcass beef, frozen or chilled	Frozen or chilled beef for industrial purposes
JAPAN	Dairy cow, live weight	Tokyo, middle grade, product weight basis	-	Product weight basis

NOTES ON TABLES 12 and 13 (cont'd)

	AVERAGE PRICE RECEIVED BY PRODUCERS	AVERAGE RETAIL PRICE FOR BEEF	AVERAGE OR REP. EXPORT PRICE	AVERAGE OR REP. IMPORT PRICE
NEW ZEALAND	Annual average prices are for the year ending 30 September. Annual prices are weighted averages. Quarterly prices are (unweighted) averages only		...	..
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
POLAND	Live weight	Boneless beef	Hind quarters, frozen or chilled	Compensated beef quarters, frozen
ROMANIA	...	...	...	..
SOUTH AFRICA	All grades, all markets	Beef sirloin Super A	...	...
SWEDEN	Cattle (not calves) slaughtered weight, whole carcass, halves and quarters	National average retail price for the whole animal	Ratio between the value and the quantity of total exports	Ratio between the value and the quantity of total imports
SWITZERLAND	Heifers and steers 1ᵃ	Beef for boiling and stewing	...	Frozen boneless beef
TUNISIA	...	Sirloin	...	Frozen boneless beef
UNITED STATES	Average price received by farmers for beef cattle	Estimated weighted average price for retail cuts, yield grade 3	Frozen boneless beef	Imported cow meat 85 per visible lean, f.o b. port of entry
URUGUAY	Steers, second weighing	Side of steer	Compensated quarters of frozen steer	-
YUGOSLAVIA	Price paid by processor	...	...	...