THE INTERNATIONAL MARKETS FOR MEAT

1987/88

GENERAL AGREEMENT ON TARIFFS AND TRADE

GENEVA, JANUARY 1988

88-0120

Introduction

The present document, the eighth annual report concerning the world markets for meat, has been prepared by the GATT secretariat, on its own responsibility, mainly on the basis of information and documentation supplied by participants in the Arrangement Regarding Bovine Meat. It covers the situation in the market for bovine animals and meat principally for the year 1987, containing estimates for the year as well as forecasts for 1988. To the extent permitted by the data available, it gives information mainly on cattle numbers, slaughter levels, production, prices, imports, consumption and exports of bovine animals and meat. It also provides short summaries of the situation and outlook in the pig-, poultry- and sheepmeat markets.

The Arrangement has been in force since 1 January 1980. The objectives of the Arrangement are *inter alia* to promote the expansion, ever greater liberalization and stability of the international meat and livestock market by facilitating the progressive dismantling of obstacles and restrictions to world trade in bovine meat and live animals, and by improving the international framework of world trade for the benefit of both consumer and producer, importer and exporter. To this end, the Arrangement provides for a comprehensive information and co-operation mechanism applicable to bovine animals and the bovine meat sector.

To date there are twenty-seven signatories of the Arrangement - Argentina, Australia, Austria, Belize, Brazil, Bulgaria, Canada, Colombia, Egypt, European Community, Finland, Guatemala, Hungary, Japan, New Zealand, Nigeria, Norway, Paraguay, Poland, Romania, South Africa, Sweden, Switzerland, Tunisia, United States, Uruguay and Yugoslavia. Representatives of other countries as well as of international governmental organizations follow its work as observers.

The International Meat Council, established in accordance with the Arrangement Regarding Bovine Meat and within the framework of the General Agreement on Tariffs and Trade, shall, among other tasks, make an evaluation of the world supply and demand situation and outlook for the world market for bovine meat and live animals, on the basis of a status report prepared by the secretariat.

Apart from the sources mentioned above, information from the following publications, *inter alia*, has been used: *Economic Outlook*, OECD, December 1987 and OECD meat statistics; *World Livestock and Poultry Situation*, United States Department of Agriculture, various issues for 1987; *In Brief*, Australian Meat and Livestock Corporation, various issues for 1987; *European Weekly Market Survey*, Meat and Livestock Commission, various issues for 1987; *Weekly Information Bulletin*, Junta Nacional de Carnes, Argentina, various issues for 1987; *The New Zealand Meat Producer*, New Zealand Meat Producers' Board, various issues for 1987; *The Reuter Meat Newsletter*, various issues for 1987; *Informe Ganadero*, Buenos Aires, various issues for 1987; *Market Commentary*, Agriculture Canada, September 1987; *Australia Quarterly Review of the Rural Economy*, September 1987 and *Marché International du bétail et des viandes*, CFCE, various issues for 1987.

Notes: "Tons" in the document means "metric tons, carcass weight", unless otherwise stated. Figures for 1987 are preliminary. Figures may not add up due to rounding. Export and import figures in Table I and in the table after each country include fresh, chilled and frozen beef and veal, as well as cooked and canned and otherwise prepared bovine meat, unless otherwise stated, but exclude carcass weight equivalent of live cattle.

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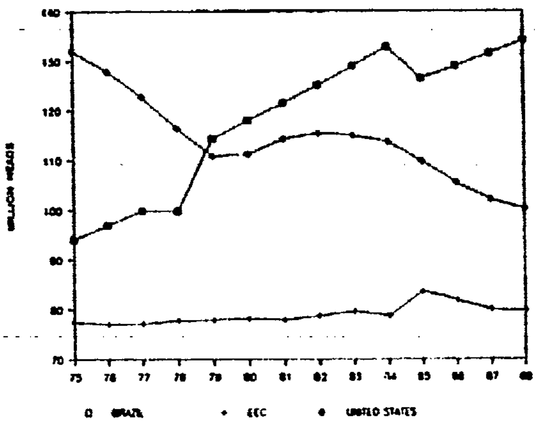

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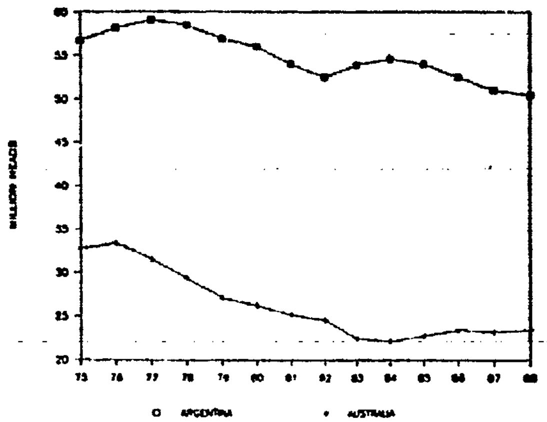

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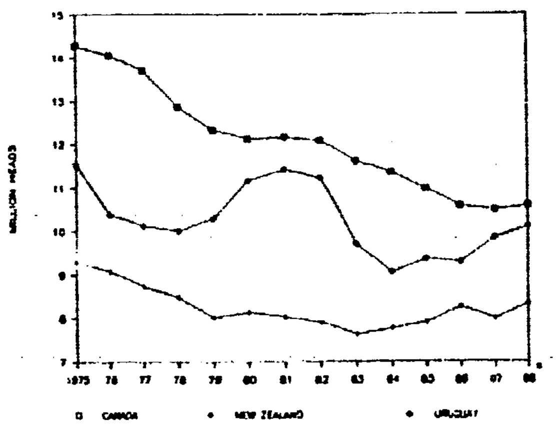

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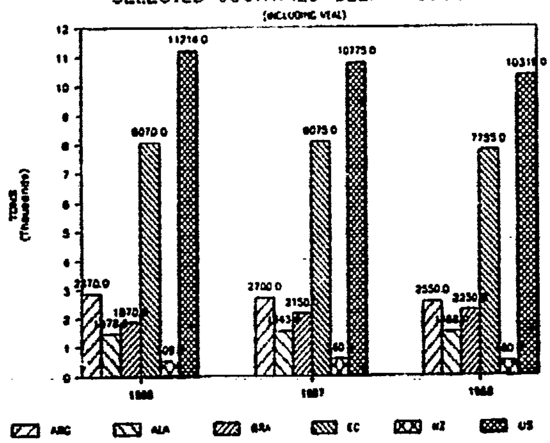

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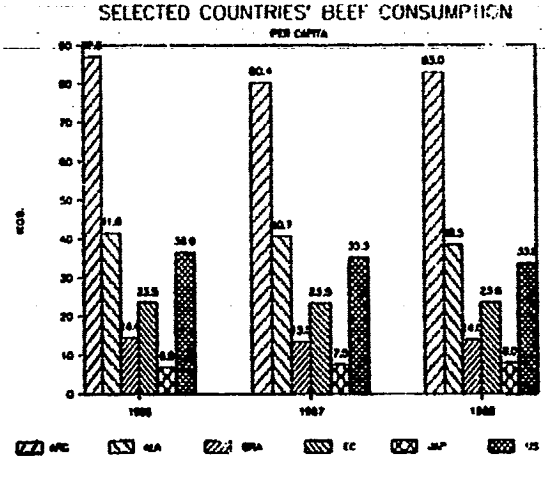

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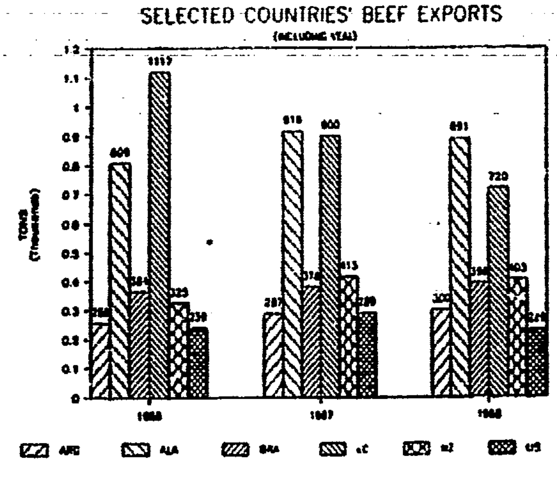
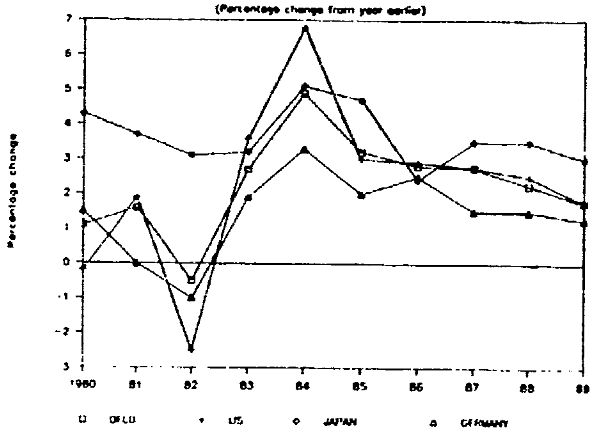


I. MAJOR FEATURES OF THE INTERNATIONAL ECONOMIC SITUATION AND OUTLOOK

1. Revised figures for economic growth in 1987 in the OECD area indicate a rise of 2.75 per cent*, a higher rate than previously forecast. The upward revision is due mainly to stronger developments than expected in the United States, where recent figures show a decline in the real trade deficit (i.e., in relation to the GNP) compared to its last estimation, and in Japan, led almost entirely by an increase in domestic demand. The effects of the recent crisis on the stock exchange, which started in mid-October, combined with the extreme depreciation of the United States dollar, upset provisions for growth in 1988 and 1989, now estimated at 2.25 and 1.75 respectively. The strongest impact of this crisis is likely to be on private consumption growth in the United States. These projections, based on exchange rates reached on 10 November, could be disturbed as the United States dollar continues to devalue. In 1987, the developing countries' economies were expected to grow by 3.5 per cent, but it is accepted that their situation will worsen slightly because of the changes in OECD environment. Inflation rates in the OECD countries have improved slightly, and they may have run at some 3.25 per cent last year, with a marginal acceleration possible in 1988 (3.5 per cent). Employment is estimated to have grown at a rate of 1.5 per cent in 1987, but it should decline to a rate of 0.75 per cent in 1989. Estimated unemployment in 1988 may run at some 8 per cent (as in 1987), but in 1989 the rate should increase to 8.25, and for the first time since 1982, it may rise in North America. As regards trade, according to GATT experts**, the volume of world trade in merchandise during the first half of 1987 was 3-3.5 per cent higher than during the same period year earlier. For the whole of 1987, estimates show an increase of 3.5 per cent in volume terms (the same rate as in 1986). No major change in the growth rate of trade is currently foreseen for 1988.

REAL GNP GROWTH IN THE OECD AREA



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* OECD Economic Outlook, December 1987

** GATT International Trade 1986/87

II. THE INTERNATIONAL SITUATION AND OUTLOOK IN THE BOVINE MEAT SECTOR

Situation in 1987

Prices: an upward trend

2. After years of highly depressed international bovine meat prices, 1987 certainly appears to have been a year of recovery. Although the upturn in prices was initiated in the autumn of 1986, it firmed during at least the first ten months of 1987 and reached an increasing number of markets. This recovery took place in spite of important adverse conditions: extremely depressed feedgrain prices which, even if it is true that they benefited cattle-raising in an important (and maybe increasing) number of countries, favoured to a much greater extent the production of pigmeat and especially poultry meat; the consequent large availability of these types of meat; the increased demand for both, but especially for poultry meat, the variety of new products in this sector seeming endless; the lower price of these meats (sometimes four or five times cheaper than beef prices); increasing health considerations which hampered the consumption of red meat; and finally, a lower economic growth than expected in a number of major consuming countries. All these factors had a negative effect on the consumption of beef and veal which, in an important number of countries, added to an apparent "saturation" level of meat consumption. In these conditions, the reason for the bovine meat price recovery was not related to an increase in consumption, but to a decline in production. Although the large sales of the European Community and United States to Brazil last year (with their resulting positive impact on world stocks) seem to have paved the way for the price recovery, the fact is that the herd liquidation phase in a number of major producing countries, such as the North American ones, was coming to an end with the consequent lower level of supplies. Also the impact of the United States and EC milk reduction programmes on the beef sector has begun to slow down. Finally, as a reaction to rising prices, herd liquidation has started to decline (or herd rebuilding to begin) in a rising number of other countries and, as a result, bovine meat production fell.

Production: stagnation or decline in some major areas

3. In 1987, world bovine meat production may have fallen by 0.5-1 per cent, to about 44.3 million tons. In North America, estimated production fell in the United States and Canada by 4 and 7 per cent respectively. This is the result of the slowdown or end of the cyclical herd liquidation phase (which in both countries was longer than previous ones as a result of the difficulties in the sector over the last few years). In the case of the United States, it could be noted that the decline also reflects the fact that in 1986, beef and veal output was particularly high as a result of the Dairy Termination Programme, which has now come to an end. In South America, production fell in Argentina (-6 per cent), Uruguay (-20 per cent) and Colombia (-2.8 per cent). In Argentina the decline was the result of lower slaughter levels, which suggests a slowdown in cattle herd liquidation, while in Uruguay and Colombia it was the consequence of cattle herd rebuilding, now well under way. Considerably higher average export

and producer prices partly explain this evolution. In Brazil, although production is estimated to ave risen, cattle and calf slaughter evolution suggests that herd liquidation could begin in the near future. In Oceania, the Australian output of bovine meat rose by 4 per cent as a result of strong import demand from its major markets. In New Zealand, in the season ending last September, the increase was of 20 per cent. This rise was largely a result of the carry-over of livestock from last season, due to the strike in the industry. Indeed, the cattle herd expansion is expected to continue in both countries into 1988. In Europe, cattle numbers continued to fall in the European Community (-3 per cent) and higher slaughters kept production at the same level as year earlier. Estimated production in the USSR may have risen by as much as 3-4 per cent due to improved efficiency, lower feedgrain prices and the desire to benefit from premiums set for better quality and over-fulfilment of plan. As a result of sharply higher slaughter weights, re 'ecting cheaper feedgrain prices, beef and veal production in Japan (wher a decline of 1 per cent was registered in cattle and calf numbers after more than ten years of uninterrupted increases) may have risen by about 4 per cent.

Consumption: decline resulting from stiffer competition from other meats

4. In 1987, reflecting expanding supplies of other meats and the decline in beef and veal production, consumption of bovine meat in North America is estimated to have dropped by more than 4 per cent in the United States and probably by more than 2 per cent in Canada. In South America, a decline was registered in Argentina, Brazil and Uruguay. In Argentina this would have been because of the production fall, the rise in exports and strongly increased retail prices; in Brazil it seems to have been the result of the eroded purchasing power of consumers and of increased competition from other meats; and in Uruguay, a consequence of the strong production decrease. In Oceania, intake of beef and veal diminished markedly in Australia, where higher quantities of beef have been diverted to export markets and competition of other meats has risen, while in New Zealand it is expected to have risen markedly as a result of production growth and lower retail prices, and in spite of higher exports and the competition of alternative meats. The estimated consumption of bovine meat showed a slight increase in some European countries, and in the EC the modest growth was, by and large, the result of the stiff competition from cheaper pigmeat, poultry meat and sheepmeat whose consumption is expected to have risen. In the USSR, beef and veal intake is accepted to have increased along with production and in Japan, a strong consumption rise occurred, in spite of higher retail prices.

Trade: drop in volume, but higher value

5. In 1987, world bovine meat trade (Table I) may have fallen by 3-4 per cent in volume but, as a result of increased international prices, it should have increased strongly in value. Timid by Autumn 1986, the recovery of international prices strengthened in the course of 1987 (and apparently especially during the first ten months of the year) and expanded to most areas of trade. The reasons for this recovery are related to the above-mentioned decline in production not only in major importing areas,

but also in major exporting ones. In these conditions, increased import demand faced with lower export availabilities could only but result in higher prices. Also, the continuing decline of the United States dollar against most currencies certainly had the effect of stimulating the import demand and the pressure of world stocks levelled off. In North America, imports increased both in the United States and Canada. However, while exports fell significantly in the latter, in the former, they rose significantly. South American exports increased in Argentina as the consequence of strongly increased export prices and in spite of lower production levels, and in Brazil reflecting the estimated production rise and lower consumption levels. In Uruguay exports were significantly reduced because of the above-mentioned production drop. Encouraged by higher export prices and increased import demand in their major markets, the Oceanic countries increased exports during the first half of the year. However, for the whole year, while New Zealand exports increased strongly (reflecting the carryover of stocks due to the strikes of early 1986), Australian exports have shown a more moderate rise (which was nevertheless of 13 per cent) as a result of low export availabilities. Although lower than in 1986, European exports still reflected high EC sales abroad. Furthermore, in spite of stagnant output, the Community still holds important and again rising stock levels. Taking into account the evolution of production, USSR import levels could not have risen markedly last year. Reflecting the pronounced rise in consumption, Japanese imports rose accordingly and by the year end were well above last year's level. Although not much data are as yet available, and in spite of an estimated 3.5 per cent economic growth, bovine meat import demand in most developing countries has presumably not recorded any remarkable recovery, taking into account these countries' levels of indebtedness and, for those concerned, the continuing and relatively low oil prices. (This is in spite of the fact that unofficial data suggest that imports by Egypt may have risen by more than 50 per cent, which partly explains the secretariat estimate for Africa, in Table I.) At best one can assume that the depreciation of the United States dollar, especially during the last months of the year, may have had a beneficial effect on imports.

TABLE I

SELECTED COUNTRIES' TRADE IN BEEF AND VEAL[1]

A. EXPORTS

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
ARGENTINA	256	287	12.1	300	4.5
AUSTRALIA	809	916	13.2	891	-2.7
BRAZIL	364	378	3.8	390	3.2
CANADA	103	85	-17.5	77	-9.4
EC[3]	1,117	900	-19.4	720	-20.0
NEW ZEALAND[4]	325	429	32.0	410	-4.4
UNITED STATES	239	289	20.9	229	-20.8
URUGUAY	186	100	-46.2	130	30.0
OTHERS[5]	308	287	-6.8	265[2]	-7.7
TOTAL	3,707	3,671	-1.0	3,412	-7.1

B. IMPORTS

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
BRAZIL	474	168	-64.6	114	-32.1
CANADA	112	143	27.7	130	-9.1
EC[3]	402	410	2.0	420[2]	2.4
JAPAN	272	318[2]	16.9	350[2]	10.1
UNITED STATES	978	1,030	5.3	1,043	1.3
USSR[6]	335	342	2.1	347	1.5
AFRICA	390	400	2.6	420[2]	5.0
OTHER ASIA[6]	122	127	4.1	130	2.4
MIDDLE EAST[6]	121	127	5.0	132	3.9
EASTERN EUROPE	45	45	0.0	58	28.9
OTHER EUROPE	24	24	0.0	27[2]	12.5
TOTAL	3,275	3,132	-4.4	3,171	1.2

[1] '000 tons carcass weight equivalent, includes fresh, chilled, frozen, cooked, canned and otherwise prepared bovine meat; excludes carcass weight equivalent of live cattle.

[2] Secretariat estimate

[3] EC of twelve as from 1986

[4] Year ended 30 September

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

[6] Source: USDA, World Livestock and Poultry Situation, September 1987.

Outlook for 1988

Good prospects, but ...

6. For 1988, and at a first glance, conditions for the continuation of the international bovine meat price recovery seem to be set: an increasing number of countries, be they importers or exporters, are at the end of cattle herd liquidation or are already in a herd rebuilding phase. Production is consequently expected to fall further or remain relatively stagnant in some major producing countries.[1] As a result, it can be expected that import demand will rise further and export availabilities will again shrink, with a resulting positive impact on prices. And yet, a number of factors, which are not necessarily isolated, throw a shadow over this scenario. The major one is, of course, the decline in beef and veal consumption in an important number of developed countries: available data for 1988 suggest an average decline of some 2 per cent for countries participating in the Arrangement. Another one is the projected continuation of low feedgrain prices. Indeed, and in spite of projections of a 4 per cent drop in world grain production in 1987 and of declining stocks for 1987/88[2], it is generally accepted that feedgrain prices will remain depressed in the current year. While being a positive factor due to its effect of lowering bovine meat production costs even in countries where cattle raising in the pasture is traditional, this is also a negative one because it will boost world production of both pigmeat (which in 1987 fell basically because of lower output in China) and poultry meat. With production of each of these meats projected to rise by some 4 per cent, their prices are expected to decline even further and will certainly hamper the bovine meat price recovery to some extent. The relative "saturation" level of total meat consumption in an important number of major consuming countries does not leave much room to manoeuvre: in order to be in a position to increase their share in overall meat intake, beef and veal have to be more price competitive (which adds further downward pressure to prices) and to diversify more fully their products. The European Community bovine meat stock levels remain high and at the beginning of 1988 they were even higher than year earlier. However, taking into account the Community projections for lower beef production it may be that it will absorb part of those stocks. The economic situation in developing countries, where new markets will increasingly have to be found, will remain dependent on uncertain oil prices, low commodity prices (even if these prices recovered somewhat in 1987, they are still well below early 1985 levels) and on the debt reimbursement burden. In this connection, a distinction should be made between trade partners acting in the "foot-and-mouth disease trade area" and those acting in the "free-trade area". While in the latter there seems to be scope for further price increases in the current year (with

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[1] United States, Canada, Argentina, Australia, New Zealand, the European Community, the USSR, Hungary, Poland, Japan (see Statistical Annex, Table 3, pages 59/60)

[2] FAO, "Perspectives de l'alimentation, No. 6, 1987 - octobre 1987"

import demand set to rise further in major importing countries in the area, and declining output in major suppliers) the situation is more uncertain in the former. Apart from the European Community, a diminishing number of North African or Middle Eastern countries and maybe the USSR, not many countries seem to be in a position to buy a relatively expensive product such as bovine meat, even if the sharp depreciation of the United States dollar may have rendered imports more attractive. Finally, and last but not least, one can wonder how far the stock exchange crisis initiated last October has affected, and will continue to affect, the beef and veal sector. Analysis suggests that the above-mentioned rise in commodity prices already seems to have been somewhat eroded. The evolution of future markets in some places also gives an example of possible consequences of the crisis: for instance, livestock futures in the Chicago Mercantile Exchange had slipped down immediately and strongly by the end of October 1987 due to fears that the event of an economic recession might undermine consumer demand for beef. Indeed it would seem that the bovine meat price recovery is starting to level off somewhat in some regions or countries and this could well be a first sign of the impact of the crisis. At the time of writing, world stock exchanges have not yet quietened down and although the depreciation of the United States dollar is still going through a series of ups and downs. In these conditions, questions about a possible economic recession (or in avoiding it, the risk of the implementation of policies leading to higher inflation and rising interest rates) are still in the air. When one notes that before the beginning of the crisis, forecasts were already of some economic deterioration in most countries (higher inflation rates, at best stabilization of employment levels, etc.), one finds good reason to be apprehensive. In summary, after a year of price recovery, and although conditions within the beef and veal sector seem to be set for another relatively "good" year, the sector remains heavily dependent on the uncertain evolution of major external factors.

TABLE II

Fresh, Chilled and Frozen Beef and Veal Exports of Seven Major Exporting Countries (1985-1987), and the Proportion of Each Country's Exports Going to Each Destination 1)

EXPORTER	AUSTRALIA 2)			EEC 3)			ARGENTINA 4)			NEW ZEALAND 5)			URUGUAY 6)			BRAZIL 7)			UNITED STATES 8)		
DESTINATION	1985	1986	1987	1985	1986	1987	1985	1986	1987	1984/5	1985/6	1986/7	1985	1986	1987	1985	1986	1987	1985	1986	1987
WESTERN EUROPE	5.8	7.7	8.3	53.9	87.6		39.4	34.0	37.7	0.4	0.5	1.3	24.4	26.5	9.0	50.5	20.1	9.2	1.3	2.7	4.3
%	1.3	1.5	1.9	9.6	5.8		53.0	44.7	57.2	0.2	0.2	0.6	26.4	20.9	19.6	36.0	35.3	46.0	1.3	1.6	4.9
of which																					
EC	5.4	6.3	6.1	0.0	0.0		33.0	32.0	30.7	0.2	0.4	1.0	20.6	22.7	9.0	42.9	26.5	9.0	0.6	1.5	4.3
%	1.2	1.2	1.4	0.0	0.0		44.4	42.1	46.6	0.1	0.2	0.5	22.3	17.9	19.6	30.6	33.3	45.0	0.6	0.9	4.9
OTHER	0.4	1.4	2.2	53.9	87.6		6.4	2.0	7.0	0.2	0.1	0.3	3.8	3.8		7.6	1.6	0.2	0.7	1.2	0.0
%	0.0	0.0	0.0	0.1	0.1		0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0
EASTERN EUROPE	0.0	0.0	0.0	96.1	447.3		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
%	0.0	0.0	0.0	17.0	29.6		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
of which																					
USSR	0.0	0.0	0.0	84.0	252.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
%	0.0	0.0	0.0	14.9	16.7		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OTHER	0.0	0.0	0.0	12.1	195.3		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
%	0.0	0.0	0.0	2.1	12.9		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
NORTH AMERICA	294.5	346.4	302.6	14.9	0.0		0.0	0.0	0.0	197.4	181.3	180.0	0.0	0.0	0.0	0.0	0.0	0.0	6.7	6.1	5.4
%	67.3	67.3	69.7	2.6	0.0		0.0	0.0	0.0	86.1	87.0	87.7	0.0	0.0	0.0	0.0	0.0	0.0	6.7	3.6	6.2
of which																					
USA	273.7	311.0	274.2	4.9	0.0		0.0	0.0	0.0	173.6	161.9	164.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
%	62.5	60.4	63.2	0.9	0.0		0.0	0.0	0.0	75.7	77.7	80.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9
CANADA	20.8	35.4	28.4	10.0	0.0		0.0	0.0	0.0	23.8	19.4	15.4	0.0	0.0	0.0	0.0	0.0	0.0	6.7	6.1	5.4
%	4.8	6.9	6.5	1.8	0.0		0.0	0.0	0.0	10.4	9.3	7.5	0.0	0.0	0.0	0.0	0.0	0.0	6.7	3.6	6.2
SOUTH AMERICA	0.0	0.0	0.0	0.0	334.5		9.4	18.0	11.7	0.0	0.0	0.0	49.2	77.8	17.0	0.7	0.0	0.0	0.0	40.7	14.7
%	0.0	0.0	0.0	0.0	22.1		12.6	23.7	17.8	0.0	0.0	0.0	53.2	61.4	37.0	0.5	0.0	0.0	0.0	24.2	16.0
of which																					
BRAZIL	0.0	0.0	0.0	0.0	334.5		0.6	11.0	6.6	0.0	0.0	0.0	48.6	70.3	17.0	0.0	0.0	0.0	0.0	40.7	14.7
%	0.0	0.0	0.0	0.0	22.1		0.8	14.5	10.0	0.0	0.0	0.0	52.6	55.5	37.0	0.0	0.0	0.0	0.0	24.2	16.8
OTHER	0.0	0.0	0.0	0.0	0.0		8.8	7.0	5.1	0.0	0.0	0.0	0.6	7.5	0.0	0.7	0.0	0.0	0.0	0.0	0.0
%	0.0	0.0	0.0	0.0	0.0		11.8	9.2	7.7	0.0	0.0	0.0	0.6	5.9	0.0	0.3	0.0	0.0	0.0	0.0	0.0
CENTRAL AMERICA AND CARIBBEAN	7.9	4.5	2.3	5.4	6.3		0.0	0.0	0.0	4.1	2.8	3.1	0.0	0.1	0.0	0.0	0.0	0.0	4.0	2.9	0.0
%	1.8	0.9	0.5	1.0	0.4		0.0	0.0	0.0	1.8	1.3	1.5	0.0	0.1	0.0	0.0	0.0	0.0	4.0	1.7	0.0
AFRICA	0.0	0.1	0.1	112.2	188.2		9.8	3.0	0.0	0.0	0.0	0.0	1.5	4.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0
%	0.0	0.0	0.0	19.9	12.5		13.2	3.7	0.0	0.0	0.0	0.0	1.6	3.2	0.0	0.0	0.0	0.0	0.0	0.1	0.0
of which																					
ALGERIA	0.0	0.0	0.0	15.5	30.8		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
%	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
LYBIA	0.0	0.0	0.0	9.5	20.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
%	0.0	0.0	0.0	1.7	1.3		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
ANGOLA	0.0	0.0	0.0	0.7	4.2		9.1	3.0	0.0	0.0	0.0	0.0	0.0	3.9	0.0	0.0	0.0	0.0	0.0	0.1	0.0
% 9)	0.0	0.0	0.0	0.1	0.3		12.2	3.9	0.0	0.0	0.0	0.0	0.0	3.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0
WEST AFRICA	0.0	0.0	0.0	45.2	80.5		0.3	0.0	0.0	0.0	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
%	0.0	0.0	0.0	8.0	5.3		0.4	0.0	0.0	0.0	0.0	0.0	1.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OTHER	0.0	0.1	0.1	41.3	52.7		0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
%	0.0	0.0	0.0	7.3	3.5		0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0

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EXPORTER	AUSTRALIA 2)			EEC 3)			ARGENTINA 4)			NEW ZEALAND 5)			URUGUAY 6)			BRAZIL 7)			UNITED STATES 8)		
DESTINATION	1985	1986	1987	1985	1986	1987	1985	1986	1987	1984/5	1985/6	1986/7	1985	1986	1987	1985	1986	1987	1985	1986	1987
MIDDLE EAST	2.9	2.6	2.7	276.5	336.5		14.6	10.0	13.4	1.5	1.3	0.9	12.6	12.7	6.0	69.2	42.5	9.1	2.0	1.3	0.0
%	0.7	0.5	0.6	49.1	22.3		17.6	13.2	20.3	0.7	0.6	0.4	13.6	10.0	13.0	49.4	53.4	45.5	2.0	0.8	0.0
of which																					
EGYPT	0.0	0.0	0.0	156.1	172.7		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.0	0.0	0.0	0.0	0.0	0.0
%	0.0	0.0	0.0	27.7	11.4		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.1	0.0	0.0	0.0	0.0	0.0
~GRAEL	0.0	0.0	0.0	2.3	13.9		11.8	10.0	10.2	0.0	0.0	0.0	7.6	8.6	6.0	9.4	3.9	0.0	0.0	0.0	0.0
%	0.0	0.0	0.0	0.4	0.9		15.9	13.2	15.5	0.0	0.0	0.0	8.2	6.8	13.0	6.7	4.9	0.0	0.0	0.0	0.0
SAUDI ARABIA	1.0	1.1	1.0	31.1	63.0		2.4	0.0	0.3	0.4	0.4	0.2	2.5	1.7	0.0	5.5	2.2	1.2	1.6	0.9	0.0
%	0.2	0.2	0.2	5.5	4.2		3.2	0.0	0.5	0.2	0.2	0.1	2.7	1.3	0.0	3.9	2.8	6.0	1.6	0.5	0.0
IRAN	0.0	0.0	0.0	28.2	21.3		0.0	0.0	2.9	0.0	0.0	0.0	2.1	2.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0
%	0.0	0.0	0.0	5.0	1.4		0.0	0.0	4.4	0.0	0.0	0.0	2.3	1.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0
IRAQ	0.0	0.0	0.0	35.6	28.7		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	51.2	36.4	7.9	0.0	0.0	0.0
%	0.0	0.0	0.0	6.3	1.9		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	36.5	45.7	39.5	0.0	0.0	0.0
GULF(exc.Iran and S. Arabia)	1.4	1.4	1.7	12.9	24.8		0.3	0.0	0.0	1.0	0.9	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.4	0.0
%	0.3	0.3	0.4	2.3	1.6		0.4	0.0	0.0	0.4	0.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.2	0.0
OTHER	0.5	0.1	0.0	10.3	12.1		0.1	0.0	0.0	0.1	0.0		0.4	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0
%	0.1	0.0	0.0	1.8	0.8		0.1	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0
FAR EAST	122.4	144.5	107.1	2.0	3.3		1.2	0.0	1.0	16.1	15.3	12.5	3.9	5.1	0.0	8.1	0.1	0.0	84.6	113.3	55.8
%	28.0	28.1	24.7	0.4	0.2		1.6	0.0	1.5	7.0	7.3	6.1	4.2	4.0	0.0	5.8	0.1	0.0	84.7	67.4	63.9
of which																					
JAPAN	94.1	109.5	80.9	1.3	1.0		0.0	0.0	0.0	7.5	6.8	5.3	0.0	0.0	0.0	0.0	0.0	0.0	81.3	109.9	55.8
%	21.5	21.3	18.6	0.2	0.1		0.0	0.0	0.0	3.3	3.3	2.6	0.0	0.0	0.0	0.0	0.0	0.0	81.4	65.4	63.9
HONG KONG	2.1	4.4	3.5	0.4	2.1		0.0	0.0	0.0	2.2	2.8	2.4	2.5	2.7	0.0	8.0	0.0	0.0	0.6	1.1	0.0
%	0.5	0.9	0.8	0.1	0.1		0.0	0.0	0.0	1.0	1.3	1.2	2.7	2.1	0.0	5.7	0.0	0.0	0.6	0.7	0.0
REP. OF KOREA	0.1	0.1	0.1	0.0	0.0		0.0	0.0	0.0	1.4	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.3	0.0
%	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.2	0.0
TAIWAN	21.3	24.5	18.2	0.0	0.0		0.0	0.0	0.0	1.9	2.6	2.1	0.0	0.0	0.0	0.0	0.0	0.0	0.8	1.2	0.0
%	4.9	4.8	4.2	0.0	0.0		0.0	0.0	0.0	0.8	1.2	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.7	0.0
SINGAPORE	1.1	1.7	1.4	0.1	0.2		1.2	0.0	1.0	0.0	0.0	0.0	1.3	1.3	0.0	0.1	0.1	0.0	0.4	0.4	0.0
%	0.3	0.3	0.3	0.0	0.0		1.6	0.0	1.5	0.0	0.0	0.0	1.4	1.8	0.0	0.1	0.1	0.0	0.4	0.2	0.0
OTHER	3.7	4.3	3.0	0.2	0.0		0.0	0.0	0.0	3.1	3.1	2.6	0.1	0.1	0.0	0.0	0.0	0.0	0.5	0.4	0.0
%	0.8	0.8	0.7	0.0	0.0		0.0	0.0	0.0	1.4	1.5	1.3	0.1	0.1	0.0	0.0	0.0	0.0	0.5	0.2	0.0
OCEANIA	3.7	8.0	9.1	1.8	1.9		0.0	0.0	0.0	9.9	7.0	7.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
%	0.8	1.6	2.1	0.3	0.1		0.0	0.0	0.0	4.3	3.4	3.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OTHER	0.4	1.2	1.8	0.9	105.7		0.0	11.0	2.1	0.0	0.2	0.0	0.8	0.5	14.0	11.7	8.9	1.7	1.3	1.0	7.1
%	0.1	0.2	0.4	0.2	7.0		0.0	14.5	3.2	0.0	0.1	0.0	0.9	0.4	30.4	8.3	11.2	9.5	1.3	0.6	8.1
TOTAL	437.6	515.0	434.0	563.7	1511.3		74.4	[illegible]	65.9	229.4	208.4	205.2	92.4	126.7	46.0	140.2	79.6	20.0	99.9	168.1	87.3
%	100.0	100.0	100.0	100.0	100.0		100.0	[illegible]	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

1) The upper number is the volume of exports (in '000 tons) expressed in product weight. The lower number is the percentage of the country's exports accounted for by each destination.

2) Source: Various issues of AMLC "In Brief". 1987: January/September
3) Source: Analytical Tables, Nimexe 1985 and 86 - External Trade, Eurostat.
1987: not available
4) Source: Various issues of the Weekly Bulletin, Junta Nacional de Carnes, Argentina;
1986: reply to questionnaire. 1987: Jan/Aug. Data in carcass weight equivalent.

NOTE: Figures may not add up due to rounding.

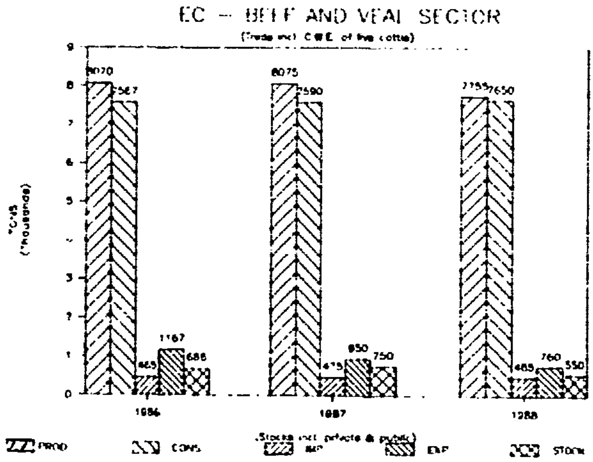
5) Source: Vol. 13/Number 1 and Vol. 15/Number 1 of the New Zealand Meat Producer.
1986/87: 1 October 1986 to 27 June 1987
6) Source: Estadisticas - Instituto Nacional de Carnes (1985 and 1986);
1987 (January/September) replies to the questionnaire.
7) Source: Replies to questionnaire. 1987: January/June.
8) Source: USDA - Dairy Livestock and Poultry - Trade and Prospects, various issues.
1987: January/June
9) For statistical purposes includes Morocco, Tunisia, Cote d'Ivoire, Togo, Ghana, Nigeria, Gabon and Congo.

III. COUNTRY-BY-COUNTRY ANALYSIS

EUROPEAN COMMUNITY

7. Last May/June, the European Community cattle herd showed a decline of about 3 per cent, to 83.072 million head, EC(12). This indicates that 1987 was the fourth consecutive year of declining cattle numbers. Practically all categories of cattle have diminished but, as might be expected taking into account the dairy quotas and their reduction decided in December 1986, the most important decline was the one of dairy cows which fell from 23,968 million, EC(10) to 22,954 million, a drop of 4.2 per cent (for the EC(12), the fall may be estimated at around 4 per cent, to 25,176 million head). Estimated cattle numbers by the end of 1987 show, at 80,000 million head, a 2.3 per cent drop, compared to the end of 1986. Although total cattle slaughter remained relatively unchanged (at some 31,750,000 head) slaughter of female cattle in 1987 rose by a significant 5 per cent, reflecting once more the December 1986 decisions. Slaughter of both adult male cattle and calf registered a decrease. These same trends are expected to continue in the current year.

8. Beef production in the Community during the first half of 1987 is expected to have increased as a result of higher slaughter rates (during that period) caused by low feed grain prices (the share of production originating from fed steers currently represents more than a third of total beef production). Veal production, which had increased marginally in 1986, seems to have risen more strongly from January to June. However, and reflecting year end slaughter levels, estimated production for 1987 was 8,075,000 tons, only marginally higher than year earlier. Beef and veal consumption, which fell at the beginning of the eighties, has recovered somewhat since then and, by the end of 1986, again reached its 1980 level (now for the EC(12)), 23.5 kgs, on a per capita basis. Estimates for 1987 have been revised downwards and suggest only a modest growth in total consumption, +0.3 per cent, to 7,590,000 tons, solely due to the population increase, as per capita consumption is expected to remain unchanged. Bovine meat intake in the Community is largely dependent on general economic conditions, but also on the relative prices of other meats. This was again evident last year, the consumption of all other meats, pigmeat, poultry meat and sheepmeat being expected to have shown an increase not only on a total consumption basis, but also on a per capita one.



9. After having reached the record level of 1,117,000 tons in 1986 (1,167,000 tons including the carcass weight equivalent of live animals), and in spite of increasing prices on world markets (which at least partly explain why EC export restitutions were lowered at the end of 1986), EC

exports of bovine meat fell in 1987. Present estimates are for 900,000 tons of beef and veal, and 50,000 tons for the carcass weight equivalent of live cattle. Part of the reason was that the Community did not export important quantities of its intervention stocks during that period. Indeed, by 1 October 1987, intervention sales had totalled only 258,000 tons, down by 57 per cent compared to year earlier (although it should be noted that the large intervention sales of 1986 were only possible as a result of the abnormally high Brazilian purchases). At the same time, from January to October 1987, intervention purchases totalled 452,000 tons, largely exceeding sales. Consequently, intervention stocks totalled 711,000 tons, while private stocks were at a level close to 150,000 tons. Estimated stocks by the end of 1987 were 9 per cent higher than year earlier, totalling 750,000 tons of which 650,000 were from intervention. Import levels were expected to have increased slightly to 475,000 tons (including the carcass weight equivalent of live cattle). EC imports are largely the result of international agreements and it is interesting to note that following negotiations related to the EC enlargement to include Spain and Portugal, Argentina's "high-quality" beef quota was raised by 4,500 tons and the frozen boneless beef quota (at 20 per cent ad valorem tariff) by 3,000 tons. In 1988, first official forecasts for imports put them at a level of 485,000 tons (including live cattle) but at the time of writing this was still under discussion. Exports might fall to 760,000 tons (also including live cattle).

10. While free-at-Community frontier offer prices have been increasing since mid-1986, during the first half of the 1987/88 season, EC market prices were on average 6 per cent below last year. Prices of qualities eligible for intervention were about 17 per cent below the intervention price, and 3 to 5 per cent below the intervention's purchase price. However, the present tendency is towards strengthening market prices which are expected to recover in the months to come.

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
Cattle and calf numbers:1/	85,540.0 4/	83,073.0 5/	-2.9	81,400.0	-2.0
Beef and veal:2/					
Production	8,070.0	8,075.0	0.1	7,755.0	-4.0
Consumption	7,567.0	7,590.0	0.3	7,650.0	0.8
Imports	402.0	410.0	2.0	420.0	2.4
Exports	1,117.0	900.0	-19.4	720.0	-20.0
Stocks3/	686.0	750.0	9.3	550.0	-26.7

1/ '000 head, May/June 2/ '000 tons 3/ Total stocks, 31 December
4/ Secretariat estimates 5/ Actual

AUSTRIA

11. Confirming herd liquidation initiated in 1985, cattle and calf numbers in 1986 fell by 0.7 per cent, to 2.637 million head. With the exception of calves (+0.7 per cent) and bulls, which remained stagnant, all other categories of cattle registered a drop. The strongest falls were registered by steers (-18.8 per cent) and dairy heifers (-2.3 per cent). As might be expected, slaughter levels rose, by 2.8 per cent, with important increases occurring in female cattle slaughter (+4.3 per cent) and in calf slaughter (+5.9 per cent). The secretariat estimates production for 1986 to be at a level of 233,000 tons, 2.2 per cent up from year earlier. Although no data are available for 1987 and 1988, it is accepted that, last year, slaughter levels declined to some extent, bringing production back to a level similar to that of 1985, that is, 227,000 tons. In the current year neither slaughter nor production are likely to show any major changes. After declining constantly since the beginning of the decade, consumption of beef and veal increased in 1985/86, apparently as a result of improved disposal income. Per capita consumption was up by a significant 6.2 per cent to 22.4 kg. It is believed that this trend continued through 1987 and will extend into 1988.

12. In the first half of 1987, exports of beef and veal rose by almost 27 per cent, to 33,000 tons. Italy absorbed 90 per cent of this amount, and the Federal Republic of Germany 7 per cent. Also a traditional exporter of live cattle, Austria had seen its exports drop dramatically in 1985. In 1986 they recovered significantly to 19,000 head, and in the first half of 1987, they had doubled compared to year earlier. Libya is traditionally Austria's major customer for live cattle and imported 75 per cent of total Austrian exports during that period. Italy was the second major client (17 per cent). For the whole of 1987, beef and veal exports are likely to have remained relatively unchanged at 62,000 tons. Live cattle exports probably rose to new record levels. In the current year, exports should decline reflecting the production drop and possibly higher consumption levels.

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
Cattle and calf numbers:[1]	2,637.0	2,611.0[3]	-1.0	2,609.0[3]	-0.1
Beef and veal:[2]					
Production	233.0[3]	227.0[3]	-2.6	226.0[3]	-0.4
Consumption	169.0	170.0[3]	0.6	171.0[3]	0.6
Exports	62.0	62.0[3]	0.0	58.0[3]	-6.5

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

FINLAND

13. At an estimated 1.440 million head by 1 December 1987, the Finnish cattle herd continued the declining trend initiated at the beginning of the eighties (and only briefly interrupted in 1984). The decline, which averaged 1.3 per cent during the first five years of the decade, accelerated in 1986 and 1987 to show average decreases of 5.2 per cent and 3.0 per cent respectively. In 1988, cattle and calf numbers are expected to fall by a further 1.6 per cent. This decrease in total cattle numbers is the result of sustained efforts to curb milk output. The drop in numbers of dairy cows and heifers has averaged 7 per cent annually since 1984. The objective is to reach 545,000 dairy cows (not including heifers) by the end of the decade. Currently they are estimated at 580,000 head. Inspected slaughter increased by some 0.5 per cent, to 622,000 head in 1987. As may be expected, the increase was largely due to higher female cattle slaughter (indeed, dairy cow slaughter was also higher as a result of poor seasonal conditions) and calf slaughter, which would have risen by 3.1 per cent and 3.6 per cent respectively, but was partly offset by a decline in adult male cattle slaughter (-2.4 per cent).

14. In spite of the above-mentioned rise in inspected cattle slaughter, estimated production of beef and veal, which in the first half of 1987 remained relatively stable (-0.2 per cent), showed a decline of about 1 per cent, to some 123,000 tons by the year end. This was the result of the increased rate of female cattle slaughter (54 per cent) in the total mix. Consumption of bovine meat, which in the last few years has been showing a series of ups and downs, rose by about 0.8 per cent in the first half of the year, and, for the year as a whole, is estimated to have risen by 1.4 per cent, to 104,000 tons in response to increased real incomes. This would correspond to a per capita increase of 0.7 per cent, to 21 kg. In Finland, as in many other European countries, pigmeat traditionally shows the highest per capita consumption. With prices 25 per cent below those for beef, it accounts (at around 33 kg. per capita) for about 56 per cent of overall per capita consumption of meat.

15. Reflecting lower production levels and increased consumption, exports of beef and veal, in spite of having risen by 15 per cent in the first half of 1987, were estimated to show a 15 per cent drop by the year end, to 19,000 tons. The USSR is virtually the sole destination for Finnish exports of fresh, chilled and frozen product, while 75 per cent of canned and cooked product went to Egypt and Saudi Arabia during the first six months of the year. Export prices between January and June 1987 averaged around US$1,030 per ton f.o.b., up by approximately 14 per cent (or 10 per cent in real terms) from year earlier.

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
Cattle and calf numbers:1/	1,484.7	1,440.0 3/	-3.0	1,417.0	-1.6
Beef and veal:2/					
Production	124.9	123.0	-1.5	120.0	-2.4
Consumption	102.6	104.0	1.4	104.0	0.0
Exports	22.3	19.0	-14.8	17.0	-10.5

1/ '000 head, 1 December   2/ '000 tons   3/ Actual

SWEDEN

16. Herd liquidation continued in Sweden in 1987. The decrease in cattle and calf numbers was of 3 per cent, to 1,664,000 head. As expected, this fall was nevertheless smaller than last year's (-6.7 per cent) which was due to the effects of the implementation of the two-price system for milk. In the current year, and through 1989, further herd reductions are expected, although at declining rates. Cattle and calf slaughter fell sharply in 1987, to 590,000 head (-12.5 per cent), which corresponds to the slower rate of herd liquidation. Female cattle slaughter was down by 7 per cent, while calf slaughter diminished by as much as 37 per cent. Further slaughter declines are expected for 1988 and 1989, but less important ones. All this suggests that by the end of the decade Swedish cattle herd could begin to rebuild again. Reflecting lower slaughter levels, production in 1987 fell by 7.5 per cent, to 136,000 tons. Strongly increased slaughter weights (+6 per cent on average) apparently resulting from improved feeding conditions related to cheaper feedgrain prices, partly compensated for the stronger cattle slaughter fall. A smaller production drop is projected for the current year (-3 per cent) and, as from 1989, output is expected to rise again.

17. Estimated per capita beef and veal consumption rose by 2.5 per cent, to 16.5 kg. in 1987, in spite of somewhat higher retail prices (at least in the first half of the year) which was due to improved disposal income. Unlike many other countries, beef and veal consumption seems to have suffered less from the competition of other meats. Indeed, per capita consumption of pigmeat, by far the consumer's preferred meat rose by only 0.6 per cent, while poultry meat per capita intake fell for the second year in a row (by 5.8 per cent). Beef and veal exports fell by an estimated 69 per cent in 1987, to only 7,500 tons. As a result, after being a net

beef exporter in the last couple of years, Sweden became a net importer (imports were estimated at 13,000 tons). This same trend is expected to continue in the near future. The reasons for this situation are lower production levels and increased consumption. Pigmeat is expected to follow similar trends. Main markets for beef and veal in 1987, were the United States and Taiwan, while imports came from Yugoslavia, Poland, Ireland and Australia.

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
Cattle and calf numbers:1/	1,715.0	1,664.0	-3.0	1,640.0	-1.4
Beef and veal:2/					
Production	147.0	136.0	-7.5	132.0	-2.9
Consumption	135.0	138.0	2.2	138.0	0.0
Imports	8.1	13.0	60.5	13.0	0.0
Exports	23.9	7.5	-68.6	6.0	-20.0

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

SWITZERLAND

18. In 1987, Swiss cattle and calf numbers continued the virtually uninterrupted decline that started at the beginning of the decade. According to the last 21 April cattle census, all categories of cattle registered a decrease, which was particularly strong for steers (-20.7 per cent), beef cows and heifers (-17.9 per cent) and bulls (-11.3 per cent). Total cattle herd decline was of 2.3 per cent, to 1,857,600 head. This fall, the strongest since 1981, seems to have been due to lower cattle prices during 1986 (on average 3.2 per cent below 1985 levels) provoked by the over-production situation of 1985/86. However, during the first three quarters of 1987, cattle and calf numbers rose by 4.8 per cent, which may well translate into higher numbers in the 1988 cattle census.

19. Reflecting strengthening prices since the beginning of the year, cattle slaughter increased by 6.5 per cent during the first two quarters of 1987. The increase was particularly pronounced in the first quarter (+12 per cent) but slowed down in the second quarter (+1.5 per cent) and presumably in the third quarter. As might be expected, beef and veal production followed the same rising trends, and by the end of September showed an accumulated increase of 4.1 per cent. However, for the first

time in the last few years, cattle slaughter was expected to show a decline by the year end. As a consequence, but also because of somewhat lower carcass weights, beef and veal production was estimated to drop by 1.4 per cent, to 167,000 tons.

20. Consumption of bovine meat which, in the first quarter of the year had risen by as much as 6.7 per cent compared to year earlier, fell back in the subsequent months and, by the end of September, the overall increase was of only 2.8 per cent. Although the strong rise in consumption during the first quarter appeared clearly to be due to lower retail prices during that period, there was evidence that, as in many other countries, beef and veal intake is being eroded by the consumption of other meats, especially poultry meat. Indeed, while the consumption of all other meats was expected to show an increase by the end of the year (poultry by 2.8 per cent), bovine meat consumption was estimated to fall by 1.5 per cent.

21. During the first three quarters of 1987, Switzerland imported 10,500 tons of beef, 2,200 tons more than last year (including the carcass weight equivalent of live cattle). However, taking into account the above-mentioned evolution of both production and consumption, it can be estimated that import levels for the year as a whole will not differ much from last year. Major suppliers of the Swiss market were the European Community and Latin America. Exports are estimated at some 4,000 tons (which is a record level), the EC being by far Switzerland's major client.

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
Cattle and calf numbers:[1/]	1,902.0	1,857.6[4/]	-2.3	1,900.0[3/]	+2.3
Beef and veal:[2/]					
Production	169.4	167.0	-1.4	165.0[3/]	-1.2
Consumption	177.6	175.0	-1.5	173.0	-1.1
Imports	10.8	11.0[3/]	1.9	10.0[3/]	-9.1

1/ '000 head, 21 April 2/ '000 tons 3/ Secretariat estimates
4/ Actual

YUGOSLAVIA

22. In 1987, cattle and calf numbers in Yugoslavia seem to have stabilized showing only a marginal 0.1 per cent decline, to a total of 5,030 million head. Cattle and calf slaughter fell by 9 per cent in 1986 and may have declined further in 1987, although at a slower rate. Bovine meat production last year was close to 350,000 tons, some 3 per cent up from year earlier, reflecting improved slaughter weights. Projections for the current year are for the stagnation of overall meat output. As far as bovine meat is concerned, this could well be the result of the beginning of herd rebuilding, which is underlined by falling slaughter levels. Per capita consumption is reported to have been declining slightly since 1986, to a level of some 14.5-14.0 kg., while total consumption is stagnant or rising marginally, not reflecting the evolution of per capita consumption, not only because of population growth but especially because of the increased share going to the tourist industry. In a reaction to high inflation rates, and consequently sharply increased production costs, the authorities which control market prices increased them last September quite considerably. (During the third quarter of the year prices averaged over 100 per cent more than during the first six months.) From January to June 1987, beef and veal exports totalled 11,400 tons, 26 per cent less than year earlier. However, exports of live cattle rose by 81 per cent to 29,300 tons (carcass weight equivalent). In these conditions, overall exports in 1987 including the carcass weight equivalent of live cattle, are estimated to have reached their 1985 level of 96,000 tons. During the first half of the year, beef and veal exports (especially "baby beef") went to Italy and Kuwait, while exports to Greece fell sharply. Live cattle exports were to Italy, Greece and Lebanon.

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
Cattle and calf numbers:1/	5,030.0	5,034.0	0.1	5,037.0 3/	0.1
Beef and veal:2/					
Production	339.0	350.0	0.3	350.0 3/	0.0
Consumption	316.0	317.0	0.3	317.0 3/	0.0
Exports	29.0	22.0	-24.1	23.0 3/	4.5

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

BULGARIA

23. Cattle herd liquidation in Bulgaria, initiated in 1983, continued last year when total numbers were at 1.678 million head, down by 1.6 per cent. However, it would seem that herd liquidation is slowing down as the decline was smaller than year earlier and both cow and calf figures fell by a lesser extent than in previous years. It could nevertheless be noted that the increase in beef cow numbers which had been rising since the early 1980's, was interrupted. Production data vary significantly from source to source. Recent information received by the secretariat referred to 1986 and put output at 107,500 tons, which is a 8.4 per cent drop compared to year earlier. Slaughter levels can be assumed to have declined somewhat in 1987 and production may have declined further. Consumption is possibly between some 95-100,000 tons.

24. Beef and veal exports remained stable during the first half of 1987, at a level of 5,000 tons. These were exclusively frozen "baby veal" of which 52 per cent went to Bulgaria's traditional major market: Jordan. Other markets were Greece, the United Arab Emirates, Irak and Kuwait. Exports of live cattle declined marginally during that period to 8,700 head, which went essentially to Libya, Lebanon and Greece. By the end of 1987 exports may have fallen somewhat.

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
Cattle and calf numbers:[1]	1,706.0	1,678.0[3]	-1.6	1,660.0[3]	-1.1
Beef and veal:[2]					
Production	107.5	104.0[3]	-3.3	..	..
Consumption	97.0	98.0[3]	1.0	..	..
Exports	15.8	15.0[3]	-5.1	..	..

[1] '000 head, 1 January [2] '000 tons [3] Secretariat estimates

HUNGARY

25. With the exception of 1982 (when it rose by 1.4 per cent) the Hungarian cattle herd has been declining since the beginning of the decade as a result of low profitability in the sector, and as a consequence of depressed prices. Current cattle and calf numbers are estimated to be at a level below 1.7 million head, and it is admitted that the decline in the cattle herd will continue until 1990. Cattle slaughter during the first

half of 1987 fell by 13.6 per cent, which resulted in a production drop of 6.6 per cent. This difference between the percentage drop in production and slaughter is explained by improved slaughter weights. Estimated production for the whole of 1987 is 98,000 to 99,000 tons. The bovine meat sector has been faced with a number of difficulties over the last few years which include, apart from the above-mentioned cattle herd decline (which Government measures have only been able to moderate), the disengagement of cattle producers, especially the smaller ones, the structural changes within the cattle herd (with declining beef cow numbers) and the competition of pigmeat and poultry meat.

26. Although total beef and veal consumption may have risen somewhat in 1987, reflecting the population increase, per capita intake was estimated to have remained stable or declined by 1-2 per cent, to some 8.7 kg. From January to June 1987, Hungary exported 16,100 tons of beef and veal, 12 per cent less than year earlier, but exported 13 per cent more of live cattle: 68,400 head. As usual, the largest part of the bovine meat exports (92 per cent) was frozen and virtually all went to the Soviet Union, while live cattle exports went also to the USSR (44 per cent), to Saudi Arabia (24.3 per cent), to Italy (18 per cent) and to Lebanon (14 per cent). It is worth noting that the average export value of frozen beef and veal to the USSR was of US$1,059 per ton f.o.b. during the first quarter of 1987, and of US$1,096 per ton f.o.b. during the second quarter, compared to US$848 and US$886 per ton f.o.b. in the corresponding periods year earlier. For 1987 as a whole, exports were estimated to have fallen by around 2 per cent to 96,500 tons (including the carcass weight equivalent of live cattle).

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
Cattle and calf numbers:1/	1,766.0	1,690.0	-4.3	1,660.0 3/	-1.8
Beef and veal:2/					
Production	105.6	98.5	-6.7	97.0 3/	-1.5
Consumption	88.5	89.0 3/	0.6	89.0 3/	0.0
Exports	40.1	35.5 3/	-11.5	30.0 3/	-15.5

1/ '000 head, 1 January   2/ '000 tons   3/ Secretariat estimates

POLAND

27. The last June cattle census showed that herd liquidation continued in 1986 and during the first half of 1987, and even accelerated. With a 3.6 per cent drop in numbers, the Polish cattle herd, which has been declining since 1979 (the only exception being 1982, when it rose by 1 per cent), now counts about 10.523 million head. This is 20 per cent less than in 1978 and the same level as in the mid-1960's. Cattle herd liquidation, in spite of the good seasonal conditions during the last four years, is partly due to low profitability in the sector, still insufficient feeding availabilities and deficient cow selection. Dairy cow and heifer numbers, which represent 55-60 per cent of the herd, continued to fall in spite of the measures introduced last year by the Government to stimulate milk production, including higher milk prices. Cattle and calf slaughter may have fallen in 1987 (unofficial sources suggest as much as a 14 per cent drop) but it seems too soon to conclude that cattle herd liquidation might come to an end.

28. The Polish estimate for beef and veal production was 670,000 tons in 1987, down by 1 per cent. As a result of the relatively small production fall and in spite of lower import levels and higher exports, consumption of bovine meat may have declined only marginally, to around 628,000 tons. The analysis of data reveals that in Poland, in spite of prices 32.9 per cent higher (pork bone-in) and 58.4 per cent higher (pork loin bone-in) than comparable beef cuts (bone-in roast beef and boneless beef, respectively), consumption of pigmeat continues to outdo, by far, the other meats. In 1986, its consumption reached 34.2 kg. per capita, with that of beef and veal only being 16.9 kg. Poultry meat consumption is still at only 7.6 kg., but has been rising steadily over the last few years.

29. Exports of beef and veal increased sharply during the first half of 1987, 29,900 tons as against 6,500 tons last year, 86 per cent consisting of fresh and chilled beef. With 11,700 tons, product weight, the USSR was Poland's major market (about 63 per cent of exports) for this type of meat. The average value of these exports was about US$1,090 per ton f.o.b. Exports of canned and cooked product totalled 2,300 tons product weight, of which 2,000 tons went to the Federal Republic of Germany. In the second half of the year, exports were estimated to fall by almost 36 per cent when compared to the same period of last year, and consequently, the overall export increase by the end of the year could have been of some 12 per cent, to 59,000 tons. Poland is also an important trader of live cattle and was expecting a 27.0 per cent rise in exports in 1987, to 380,000 head. With 87 per cent (174,900 head) of the total in the first half of the year, the European Community was its major market, followed by Lebanon (11,700 head).

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
Cattle and calf numbers:[1]	10,919.0	10,523.3[4]	-3.6	10,400.0[3]	-1.2
Beef and veal:[2]					
Production	706.0	699.6	-0.9	664.0	-5.1
Consumption	631.0	628.0[3]	-0.5	600.0[3]	-4.5
Exports	52.7	59.0	12.0	36.0	-39.0

[1] '000 head, June [2] '000 tons [3] Secretariat estimates
[4] Actual

SOUTH AFRICA

30. According to the last August census, the South African cattle herd increased by 1.0 per cent, to 7,909,000 head, compared to year earlier. In spite of this marginal rise and after five years of declining numbers largely due to persistent drought conditions, herd rebuilding seems now to be under way. Should favourable weather conditions allow, cattle and calf numbers might increase by 2.4 per cent in 1988 and a further 2.5 per cent in 1989. Total slaughter fell by some 5 per cent in 1987. Underlining the cattle herd recovery, calf slaughter fell by 23.5 per cent, while female cattle slaughterings declined by 6.5 per cent. In 1988, cattle slaughter should decrease by a further 6 per cent, after which, in 1989, it is expected to begin to increase again.

31. As a result of the lower slaughter levels, beef and veal production was estimated to fall by about 5 per cent, to some 604,000 tons. Lower slaughter levels, accompanied furthermore by expected lower carcass weights, should result in even lower production in 1988. Partly as a consequence of the decline in production, beef and veal consumption was set to fall by almost 6 per cent in 1987, but it would still have exceeded production by 54,000 tons. Without stocks, South Africa expected to import some 31,500 tons of beef and veal and 150,000 live animals. As usual, imports came largely from neighbouring countries, but in the ten months up to July 1987, imports (of low-quality beef for the processing industry) from Europe amounted to some 12,000 tons.

32. Last year, retail prices of bovine meat increased strongly (by 15 per cent in real terms), and as in many other countries, consumption continued to be increasingly affected by the intake of cheaper pigmeat and poultry meat, together estimated to have risen by some 5 per cent. Beef and veal per capita consumption which exceeded poultry meat consumption by some 10 kg. in the beginning of the 1980's, only exceeded it by an estimated 4 kg. in 1987.

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
Cattle and calf numbers:1/	7,828.0	7,909.0 4/	1.0	8,100.0	2.4
Beef and veal:2/					
Production	636.1	603.7	-5.1	595.8	-1.3
Consumption 3/	697.6	657.7	-5.7	655.0	-0.4
Imports	23.9	31.5	31.8	31.5	0.0

1/ '000 head, 31 August   2/ '000 tons   3/ Estimates
4/ Actual

BRAZIL

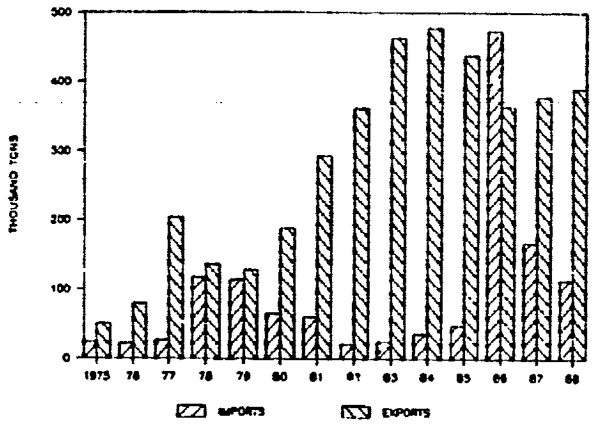
33. Estimated cattle and calf numbers in Brazil totalled 131,503,000 head in 1987, up by 2 per cent from last year. Although a further 2 per cent increase is projected for 1988, it has been suggested that the practically uninterrupted rise in cattle numbers of the last twenty years might soon come to an end. More severe credit conditions, rather high interest rates and, by mid-year, prices below historical averages, would be the reasons for strong cattle supply in the next slaughtering season and may consequently give rise to a phase of herd liquidation. Although it is too early to draw clear conclusions from the analysis of the official data, it can be noted that cattle and calf slaughter rose by an estimated 19 per cent in the course of the year and that projections for 1988 suggest a further 2 per cent increase, which could confirm the possibility of herd liquidation.

34. In line with increased slaughter levels, estimated production of beef and veal rose by 15 per cent in 1987, to 2,150,000 tons. Taking into account that in the first six months of the year production had fallen by almost 7 per cent, this implies that bovine meat production during the 1987 slaughtering off-season (September to November) was sharply up compared to year earlier. One of the reasons for the decline in production in the first half of the year might well have been low producer prices which, after the recovery registered at the beginning of the year following the price liberalization, would have fallen to levels below historical

averages. Should the above-mentioned slaughter increase take place, production could continue to rise in 1988 to reach some 2,250,000 tons. Because of the consumers' eroded purchasing power and increased competition from other meats, total consumption of beef and veal fell by 2.4 per cent in 1987, while per capita consumption diminished by approximately 6 per cent. Simultaneously, both total and per capita consumption of pigmeat and especially of poultry meat continued to rise. Per capita intake of the latter amounted to approximately 12 kg., only 1.6 kg. less than that of beef.

35. Following the record level reached last year for well-known reasons, Brazilian imports are estimated to have declined significantly in 1987. From January to June they totalled 110,000 tons, of which some 70 to 80 per cent appear to consist of the delivery of the 1986 large purchases from the European Community and the United States. Since the beginning of last year, Uruguay has been Brazil's major supplier. By the end of 1987 total imports may have reached some 168,000 tons (including the 1986 import deliveries). Exports, which fell sharply in the first six months of 1987 (109,000 tons, some 50 per cent less than year earlier) were officially estimated at 378,000 tons, 4 per cent up, for the year as a whole. From January to June, exports of fresh, frozen and chilled beef and veal represented some 23 per cent of total exports and the major markets were Irak and the European Community. Exports of canned product amounted to some 84,000 tons and major markets were the EC (especially the United Kingdom) and the United States. Imports are expected to decline further in 1988, while exports are expected to rise by a further 3 per cent, to 390,000 tons.

BRAZIL -- BOVINE MEAT TRADE



	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
Cattle and calf numbers:[1]	128,925.0	131,503.0	2.0	134,133.0	2.0
Beef and veal:[2]					
Production	1,870.0	2,150.0	15.0	2,250.0	4.7
Consumption	1,988.0	1,940.0	-2.4	1,975.0	1.8
Imports	474.0	168.0	-64.6	114.0	-32.1
Exports	364.0	378.0	3.8	390.0	3.2

[1] '000 head [2] '000 tons

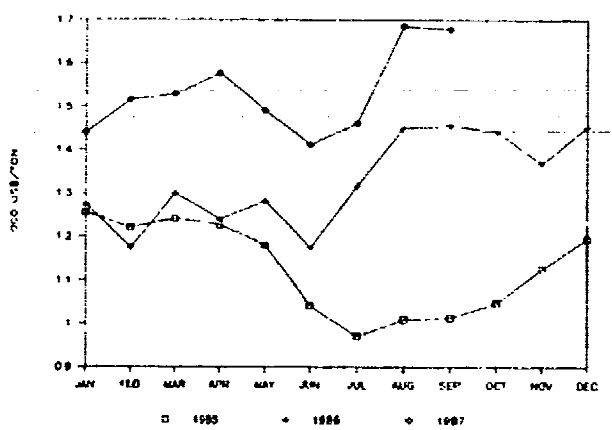
ARGENTINA

36. At an estimated 51 million head by June 1987, down by around 3 per cent from year earlier, Argentinian cattle and calf numbers reached their lowest level since 1971. In 1987, and after having accelerated in the second half of the year, total slaughter fell by 9 per cent, to 12,800,000 head. However, and although the female cattle percentage in the total slaughter mix fell from 45.6 per cent year earlier to 43.4 per cent in 1987, this still seems too high (and indeed heifer slaughter increased from 14.3 per cent of the total to 15.3 per cent) suggesting the beginning of herd rebuilding. Strongly increased cattle prices up to August might have stimulated producers to start rebuilding their herds soon after. From January to August, steers index price at Liniers averaged 121 (1960 = 100) up by 37.5 per cent from year earlier, reaching 148 last August, a record level for the last ten years. However, partly reflecting a strong drop in internal demand, prices have been falling sharply again since the end of August (the steers index price at Liniers dropped to 85 in the first week of December) probably hampering the possibility of herd rebuilding. Nevertheless, by the end of December, real steer's prices had begun to recover and in the first weeks of 1988, the index price at Liniers was at 105. Total cattle slaughter may decline by a further 6 per cent in 1988.

37. In spite of a 9 per cent decline in slaughter levels, production of beef and veal was estimated to fall by only 6 per cent, to 2,700,000 tons in 1987, as a result of increased slaughter weights (which averaged 211 kg. against 205 kg. year earlier). Per capita consumption of bovine meat has fallen markedly since June 1987. From an average of 82 kg. in the first half of the year, it dropped to 73 kg. in the third quarter and to 75 kg. in the last quarter. This was not only the result of increased exports and falling production, but also of strongly increased retail prices (which in 1987 increased by 158 per cent, even if the consumer price index increased by 175 per cent) at a moment of seriously eroded salaries. Taking into account the strong elasticity of beef demand in Argentina, it can be expected that the measures announced by the Argentinian authorities, including a 59 per cent rise for minimum salaries, encouraged the demand for beef. Indeed, consumption seems to be rising again.

38. Reflecting rising prices in international markets beef exports rose by 12.0 per cent, to 286,900 tons, in 1987. This increase was due to the dramatic rise (33 per cent, to 191,100 tons) in exports of canned and cooked products which benefited from stronger import demand by the United States (exports to this market rose by 23 per cent, to 111,100 tons) while imports by the European Community more than doubled to reach 64,300 tons, as a consequence of the "re-opening" of the United Kingdom market. Sales of fresh, chilled and frozen beef and veal fell by 15 per cent, to 95,000 tons, with the EC accounting for about 51 per cent of the

ARGENTINA AVERAGE EXPORT PRICES



total, while imports by Brazil. It is worth noting that, in spite of the improved picture of its external trade, the export sector in Argentina went through serious problems last August. Extremely high steer prices in the domestic market rendered sales abroad non-competitive in dollar terms and the result was a sharp drop in exports. Aware of the fact that the cattle "future price system" introduced in May 1987 has proved inadequate to curb prices, and in spite of the reduction in the number of middle-men in the distribution chain, the Argentinian Government is reported to have given the "Junta Nacional de Carnes" exceptional powers to overcome the situation. These would include the suspension of auctions at the Liniers market whenever "the number of head of cattle on offer is lower than the estimated demand". Maximum sale prices for bovine cattle for slaughtering were also introduced on 19 October 1987. Furthermore, it can be expected that the recent devaluation of the austral will stimulate exports again. Total exports for 1987 have been estimated at 287,000 tons.

	1986	Estimates 1987	%Change 1987/86	Forecast 1988[3/]	%Change 1988/87
Cattle and calf numbers:[1/]	52,500.0	51,000.0[4/]	-2.9	50,500.0	-1.0
Beef and veal:[2/]					
Production	2,870.0	2,700.0	-5.9	2,550.0	-5.6
Consumption	2,614.0	2,413.0	-7.7	2,250.0	-6.8
Exports	256.0	287.0	12.1	300.0	4.5

1/ '000 head, 30 June 2/ '000 tons 3/ Secretariat forecast
4/ Actual

COLOMBIA

30. At 23,971,000 head in 1987, estimated cattle and calf numbers suggest that, after two years of decline, the Colombian cattle herd is recovering again. The rise compared to year earlier was of 1.6 per cent and further rises are projected up to 1989. Cattle and calf slaughter may have fallen by 1.2 per cent, but the decline in female cattle slaughter would have been stronger (2-3 per cent). In response to lower slaughtering levels, production fell in 1987 by an estimated 2.8 per cent, to 579,000 tons. Improved producer prices (+42.4 per cent), partly due to stronger export prices, seem to have encouraged producers to delay the marketing and slaughtering of their cattle, at least during part of the year, in the expectation of even higher prices. In the current year, and with prices indeed projected to rise further, both calf and cattle slaughter and beef and veal production are expected to increase significantly. Per capita beef and veal consumption in Colombia has remained fairly stable over the

last few years, at around 21-21.4 kg. However, estimates for 1987 indicate a 5 per cent drop to 20.2 kg. compared to year earlier. This consumption fall reflects the output decline (total consumption fell by roughly the same percentage and quantity as production) but could also signify an increase of competition from pigmeat, and especially from poultry meat (whose retail price averages 30 per cent less than beef). Indeed, not only both these meats' consumption rose last year, but it is also expected that their intake will continue to rise in 1988 (pigmeat by 2.3 per cent and poultry meat by as much as 6.5 per cent), while that of bovine meat should increase by only 1.6 per cent.

40. Exports of beef and veal during the first half of 1987 totalled 5,400 tons, a 72 per cent rise compared to year earlier. The average export value was US$1,812 per ton f.o.b. Peru remained Colombia's traditional major market with an 86 per cent market share during that period, while the other traditional market, the Netherlands Antilles, imported the remaining 14 per cent. For the year as a whole, exports to Peru were estimated to total 6,630 tons, and exports to the Netherlands Antilles 1,939 tons, making an overall total of 8,569 tons, a 22.5 per cent drop compared to 1986. For the current year there are projections for an export recovery to 10,500 tons and a 3.5 per cent rise in the average export value to US$2,038 per ton.

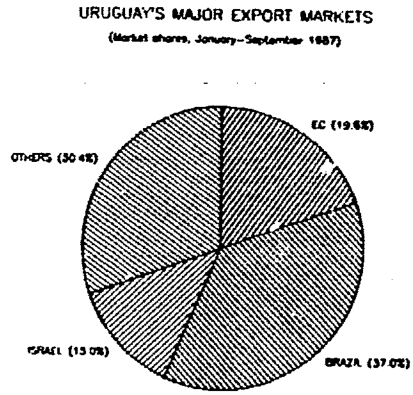
	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
Cattle and calf numbers:1/	23,593.0	23,971.0	1.6	24,451.0	2.0
Beef and veal:2/					
Production	596.0	579.1	-2.8	590.2	1.9
Consumption	585.0	570.6	-2.5	579.7	1.6
Exports	11.1	8.6	-22.5	10.5	22.1

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

URUGUAY

41. According to the 30 June 1987 census, cattle and calf numbers in Uruguay totalled 9,855,000 head, up by 6 per cent. Stimulated by rising exporting prices (since 1986 and at least for part of 1987) producers retained their cattle and began to rebuild their herds. A further 2.6 per cent rise in total cattle numbers is expected for the current year. Confirming herd rebuilding, cattle slaughter fell by a strong 18 per cent to 1,324,000 head. All categories of cattle slaughter declined with falls varying from 15 per cent (cows and heifers) to 21 per cent (adult male cattle). As a result, in 1987 bovine meat production is estimated to have

fallen by 20 per cent to 284,000 tons. Projections for 1988 indicated that both cattle slaughter and beef and veal production should rise by some 8 per cent. Estimated bovine meat consumption for 1987 shows marginal changes compared to year earlier and, on a per capita basis, was at a level of 59 kg. No major changes are expected in the current year. As opposed to other countries, beef and veal consumption in Uruguay has shown a series of ups and downs over the last few years, which seem to be related more to the consumers' disposable income than to the competition of other meats. Indeed, data analysis suggests that the steady growth of poultry meat consumption (although at the still modest level of 5.9 kg. per capita) since the beginning of the eighties, is taking place at the expense of pigmeat rather than at that of bovine meat.



42. With a decline in production, stable consumption and unchanged stock levels (which amount to a scarce 10,000 tons) Uruguayan estimated exports in 1987 fell by a strong 46 per cent to 100,000 tons. Of these, 85,000 tons were fresh, refrigerated and frozen, and 15,000 tons were canned and cooked. Major markets during the first ten months of the year were the European Community (35,000 tons), Brazil (22,000 tons) and Israel (9,000 tons). Uruguay's sole bilateral export agreement is with Brazil and accounts for a total 70,000 tons (of which 30,000 tons for the Brazilian domestic market and 40,000 tons under the Brazilian "draw-back" system). However, taking into account that country's internal problems, this agreement is not being fulfilled. Following an increase in production and unexpected changes in consumption, exports of beef and veal for the current year are projected at 130,000 tons.

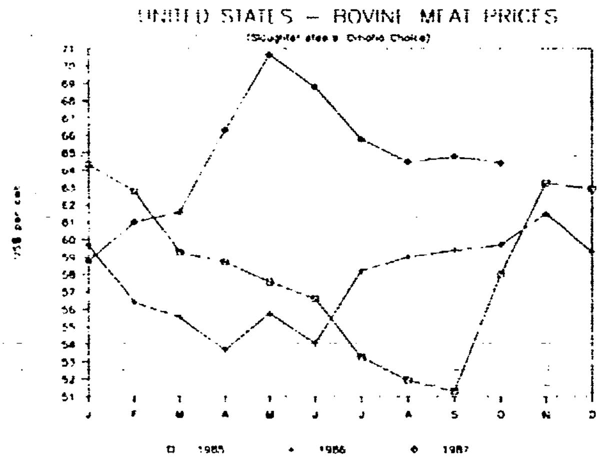
	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
Cattle and calf numbers:[1]	9,303.0	9,855.0	5.9	10,111.0[3]	2.6
Beef and veal:[2]					
Production	354.0	284.0	-19.8	307.0	8.1
Consumption	178.0	176.0	-1.1	177.0	0.6
Exports	186.0	100.0	-46.2	130.0	30.0

[1] '000 head, 30 June   [2] '000 tons   [3] Secretariat estimate

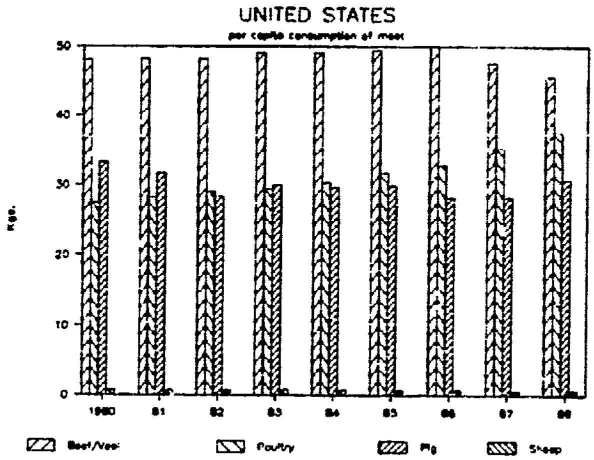
UNITED STATES

43. According to the 1 June 1987 cattle and calf inventory, the United States cattle herd fell by 2 per cent, to 112.100 million head. The fact that in June 1986 the fall had been of 3.2 per cent indicates that cattle herd liquidation is slowing down. With the exception of beef cow numbers, which increased slightly, the numbers of all the other categories of cattle fell or remained practically unchanged. As a consequence of the Dairy Termination Programme, dairy cow numbers registered, at about 5 per cent, the most pronounced drop. Estimates indicate that, in spite of the current slight increase, beef cow numbers will show no significant recovery before 1989.

44. Commercial cattle and calf slaughter during the first three quarters of 1987 fell by 4.4 per cent. All categories showed a decline, but the drop in cow and calf slaughter, which accelerated in the second quarter, was particularly strong: beef cow slaughter fell by 12-13 per cent, dairy cow by 20-21 per cent, and calf by 17.7 per cent. This was largely the result of the end of the Dairy Termination Programme. Although the fed cattle slaughter proportion of the total was slightly higher, it also fell somewhat in absolute terms and average weights dropped. Consequently, commercial beef and veal production in the first nine months of the year fell by 4 per cent, to around 7,960,000 tons. " the year end, as a result of continuing lower cattle and calf slaughter in the second half of the year, total beef and veal production, at some 10.9 million tons, should have been 4 per cent below last year's level. Projections for 1988 suggest a near 5 per cent drop in slaughter, but higher slaughter weights (due to a larger percentage of fed cattle in the slaughter mix, at least in the first half of the year) will result in a further 4 per cent fall in production.



45. Cattle prices increased markedly during the first half of the year (choice fed steer prices at Omaha were, on average, 15.5 per cent higher than year earlier) and even if the price rise has slowed down somewhat since then (largely as a result of continuously expanding supplies of already abundant and lower-priced competing meats), prices were still some 13.7 per cent above their level of last year by the end of September. The rise in cattle prices was reflected in retail beef prices, which over the same period averaged 5 per cent more than year earlier. With reduced output and higher retail prices, consumption of beef and veal, already largely eroded by cheaper competing meats, could only fall. In 1987, total consumption could have dropped by some 4.2 per cent (5.2 per cent per capita, to 47.4 kg.) and may decline in the current year by a further 3.4 per cent (4.1 per cent per capita), while both pigmeat and poultry meat consumption are expected to rise. Beef prices are not expected to increase above their already high levels.



46. Reflecting the lower rate of cow slaughter, imports of beef and veal during the first half of the year were up by almost 19 per cent to around 385,200 tons (product weight) of which about 86 per cent were boneless beef. Australia and New Zealand were again the major suppliers with 43 per cent and 32 per cent respectively of total United States imports, while Canada, facing lower export availabilities as a result of lower production, saw its share decline from 13 per cent to 9.5 per cent. With the meat import law "trigger level" for 1987 established at 653,100 tons (product weight) and continuously rising imports in the second half of the year, the United States invited both Australia and New Zealand to "voluntarily" restrain their exports to 327,500 tons and 199,000 tons maximum. The 1988 "trigger level" was calculated at about 694,000 tons, and total imports are expected to exceed 1 million tons.

47. From January to June 1987, United States exports of beef and veal increased by 50 per cent to 91,202 tons (product weight). This impressive increase is partly explained by the delayed shipments of beef to Brazil, following last year's large sale to this country, which took place at the beginning of the year. However, excluding these, exports still show a strong 26 per cent increase. Indeed, sales to Japan (boosted by a strong yen and shortages of high-quality beef there) rose by more than 15 per cent (to 57,000 tons), sales to Canada more than doubled (to 6,000 tons) and sales to the EC increased from 580 tons to 4,500 tons. Total exports by the year end are projected to show a 6 per cent increase, to about 252,000 tons and in 1988 could decline by some 27 per cent.

48. The United States currently has two export assistance programmes in force which affect bovine meat: the Targeted Export Assistance Programme (TEA) and the Export Enhancement Programme (EEP). The TEA was authorized by the Food Security Act of 1985 and was implemented "to help United States producers finance promotion activities for United States agricultural products disadvantaged by the unfair trade practices of competitor nations". This programme supports a number of commodities and a sum of US$7,000,000 was provided for red meat in the fiscal year 1987. As a result of this programme, beef was sold to Brazil, Venezuela and Mexico. The EEP "is designed to counter unfair trade practices of competitor countries in third markets". Among other livestock and poultry commodities, the EEP supports the export of 65,500 dairy cattle, targeted to thirteen countries. Approved sales up to last September amounted to 49,264 head to eleven countries and EEP exports were valued at US$5 million, to five countries (Indonesia, Morocco, Iraq, Turkey and Oman).*

*This paragraph is based on information published in USDA's Dairy, Livestock and Poultry: United States Trade and Prospects, FDLP 5-87, September 1987.

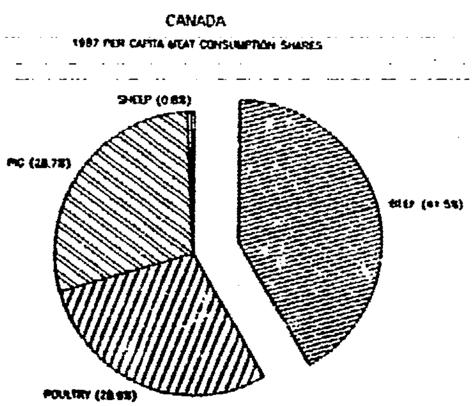
	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
Cattle and calf numbers:[1/]	114,400.0	112,100.0[3/]	-2.0	110,000.0[4/]	-1.9
Beef and veal:[2/]					
Production	11,292.0	10,854.0	-3.9	10,398.0	-4.2
Consumption	11,959.9	11,523.1	-3.7	11,119.8	-3.5
Imports	977.9	1,029.7	5.3	1,043.3	1.3
Exports	238.6	288.5	20.9	229.1	-20.6

[1/] '000 head, 1 June [2/] '000 tons [3/] Actual
[4/] Secretariat estimate

Source: USDA, Livestock and Poultry, Situation and Outlook Report, August 1987 and November 1987

CANADA

49. After ten years of cattle herd liquidation, Canadian cattle and calf numbers were expected to show a 1 per cent increase, to 10.587 million head, by 1 January 1988. Total cattle and calf slaughter is estimated to have fallen by 7 per cent in 1987, and although all categories of cattle were affected, the fall was particularly strong in cow and heifer slaughter levels (11 per cent) and of calves (around 9 per cent). This clearly suggests that cattle herd rebuilding is under way and has undoubtedly been encouraged by significantly increased cattle prices. (In 1987, A1A2 slaughter steer prices at Toronto averaged 89 cents, 5 per cent higher than in 1986.) A further 2 per cent rise in numbers is projected for 1988, while prices are expected to remain strong. Following cattle slaughter trends (especially the sharp decrease in female slaughter), and in spite of somewhat higher slaughter weights, beef and veal production in 1987 is estimated to have fallen by around 7 per cent to 965,500 tons. In 1988 it could continue to slide down by 2-3 per cent. As a result of lower production levels, higher retail prices and increased competition from lower priced meats (provoked, as in



many other countries, by low feedgrain prices) Canadian consumption of beef and veal is estimated, at 1,026 million tons, to have declined by 2.4 per cent, or by 2.9 per cent in per capita terms. This trend is expected to continue in the current year, although maybe at a slower rate (1-2 per cent).

50. Reflecting lower production levels, beef and veal imports rose strongly in 1987, and were estimated at 142,700 tons, 28 per cent up on year earlier. In the first half of the year, imports of frozen beef and veal, which represent the bulk of Canada's imports (close to 70 per cent during this period) came from its two major traditional suppliers, Australia (55 per cent) and New Zealand (34 per cent). Imports of fresh and chilled beef and veal (about 25 per cent of total bovine meat imports) virtually all came from the United States. Imports of live cattle (by and large, fed cattle), also virtually all from the United States, rose sharply and should have totalled some 90,000 head (+53 per cent) by the year end. While live cattle imports are expected to continue to rise this year (+19 per cent) beef and veal imports should decline by some 9 per cent. Lower supplies also resulted in lower export availabilities. During the first half of 1987, beef and veal exports fell by 21 per cent, and by the year end, they should have been at some 85,000 tons, 18 per cent less than year earlier. Live cattle exports rose by 8 per cent from January to June and were estimated to show a 1 per cent rise by December, to 180,000 head. Canadian exports of live cattle virtually all go to the United States, which also absorbs more than 90 per cent of total Canadian beef and veal exports. In 1988 both live cattle (-11 per cent) and beef and veal (-9 per cent) exports are projected to fall.

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
Cattle and calf numbers:1/	10,590.7	10,492.7 3/	-0.9	10,587.0	0.9
Beef and veal:2/					
Production	1,040.0	965.5	-7.2	934.0	-3.3
Consumption	1,051.5	1,026.0	-2.4	1,010.0	-1.6
Imports	111.5	142.7	28.0	130.0	-8.9
Exports	103.4	85.0	-17.8	77.0	-9.4

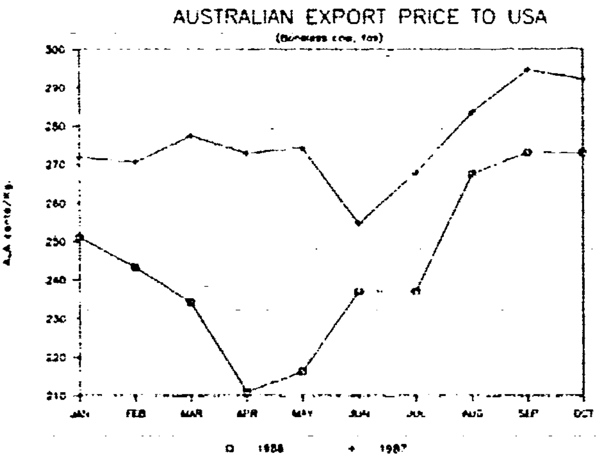
1/ '000 head, 1 January 2/ '000 tons 3/ Actual

AUSTRALIA

51. The Australian cattle herd is forecast to total, by March 1988, some 23.5 million head, an increase of 1.1 per cent. This is a slower growth than earlier expected and partly reflects increased profitability in the sheep industry as well as strong beef export demand. At 3,996,400 head,

slaughtering levels from January to July 1987 rose by 3.9 per cent compared to year earlier. However, with the female cattle share in the total slaughter mix sliding down (to 47 per cent in 1986) and calf slaughter 13.4 per cent below last year, cattle herd rebuilding continued. In this regard, it is worth noting that since 1985, when herd rebuilding began, the average annual rate of increase of the Australian cattle herd has only been of 1.9 to 2 per cent, far below the rate during the last period of continuous herd rebuilding (from 1967 to 1976) when the average rate of increase was 6.5 per cent. Estimated slaughter for 1987 is 7.9 million head, up by 0.5 per cent from year earlier, and projections for the current year are for a 4 per cent drop.

52. During the first seven months of 1987 and in response to strong import demand from Australia's two major markets, the United States and Japan, production of beef rose by almost 5 per cent, to 876,743 tons. For the year as a whole the increase was estimated at 4 per cent, the slowdown in production for the rest of the year partly reflecting the "voluntary" export restraint agreed with the United States[1], although this has been partly offset by the expansion of the Japanese market in late 1987. Beef and veal consumption has fallen markedly compared to year earlier, not only because of increased export demand, but also because of rising retail prices and the continuously rising competition of lamb, chicken and pork. Per capita beef and veal consumption fell by around 7 per cent to approximately 39 kg., while lamb, chicken and pork per capita intake rose by 2.7 per cent, 4.3 per cent and 6.5 per cent respectively to a total of 57.8 kg.



53. Australian exports of beef and veal in the year July 1986 to June 1987 increased by 18.4 per cent, to 554,151 tons (product weight). Exports to the United States rose by 19 per cent, to 285,050 tons; to Japan by 17.8 per cent, to 114,593 tons and to Canada by 6.2 per cent, to 34,173 tons. Since the beginning of the calendar year 1987, exports were encouraged by higher export prices. Under the influence of rising feeder calf prices in the United States, the price for Australian boneless cows for export to this country has increased by around 14 per cent in the first eight months of 1987. Reflecting higher slaughter weights, production in 1988 should decline less than slaughter, herd rebuilding is expected to continue in response to good seasonal conditions and improved returns to producers, but exports are projected to fall, in spite of continuing strong import demand, because of strong sales abroad over the last two months of 1987.

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[1] See page 33, paragraph 46

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
Cattle and calf numbers:1/	23,436.0	23,263.0 3/	-0.7	23,282.0	0.1
Beef and veal:2/					
Production	1,478.0	1,543.0	4.4	1,488.0	-3.6
Consumption	664.0	627.0	-5.6	597.0	-4.8
Exports	809.0	916.0	13.2	891.0	-2.7

1/ '000 head, 31 March   2/ '000 tons   3/ Actual

NEW ZEALAND

54. Total cattle numbers in New Zealand totalled some 8 million head by June 1987, a decline of about 3.4 per cent compared to year earlier. Beef cattle numbers registered a 2 per cent fall, to 4.8 million head, while dairy cattle numbers dropped by over 5 per cent, to 3.2 million head. However, these provisional figures are difficult to compare with those from 1986 which were inflated by the meat workers' strike that affected the industry at the beginning of that year. Indeed, during 1987 cattle numbers, and especially beef cattle numbers rose compared to 1985, as a result of the shift from sheep to beef production because of increased profitability and improved producer confidence in the beef market. Some expansion of the cattle herd is expected to continue in the next two to three years. Inspected slaughterings in 1987 were expected to show an increase of 18.3 per cent, to 3,084 thousand head, reflecting the carry-over of livestock from the previous year provoked by the industry's strikes. In 1988, total slaughter is expected to fall by 5 per cent, but adult cattle slaughter (2.19 million head in 1987) is projected to decline by approximately 6.4 per cent.

55. At 562,800 tons, beef and veal production in the season 1986/87 (year ending 30 September) was 20 per cent up from year earlier. This marked increase is by and large due to the carry-over of livestock from the previous season, caused by the strikes and presumably also to the supply of livestock retained by farmers in the 1985/86 season in the expectation of higher returns in the current season. Financial pressures on farmers may also have led to some de-stocking. While there has been a strong import demand from New Zealand's major "traditional" markets, especially the United States, New Zealand farmers did not benefit as did Australian producers from the increase registered by the United States import prices. This was because of the appreciation of their currency against the United States dollar (during the first six months of 1987, the New Zealand dollar was quoted on average at around 5 per cent higher than during the same

period of 1986 and some 25 per cent over 1985). In 1987, total beef and veal consumption was estimated to be 131,000 tons, up by around 11 per cent, partly reflecting lower retail prices in real terms, at least during the first half of the year.

56. During the season ended in September 1987, beef and veal exports totalled an estimated 275,000 tons (product weight), an increase of 32 per cent. This was of course largely due to the above-mentioned stock carry-over originated by the strikes of early 1986 and boosted by the strong import demand from major markets. Exports to the United States have also increased by as much as 32 per cent during the year ending September 1987, totalling some 214,000 tons. Exports to Canada, the second largest market, have also risen, largely as a result of the countervailing duties action by Canada on EC beef imports. In 1987/88 the effects of the strikes of early 1986 will have been totally absorbed and New Zealand will return to "more normal" export patterns. Total exports for 1988 are projected at 263,000 tons (product weight), down by 2.6 per cent.

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
Cattle and calf numbers: 1/	8,279.0	8,000.0 4/	-3.4	8,160.0	2.0
Beef and veal: 2/					
Production	467.6	562.8	20.4	522.0	-7.2
Consumption	118.0	131.0	11.0	130.0	-0.8
Exports 3/	208.6	275.2	31.9	263.0	-4.4
	325.4	429.4	32.0	410.0	-4.5

1/ '000 head, 30 June 2/ '000 tons, year ending 30 September

3/ Product weight. Figure in second line is the approximate carcass weight equivalent.

4/ Actual

JAPAN

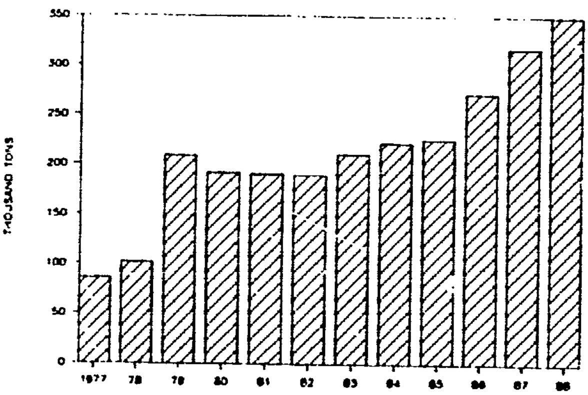
57. For the first time since the slight decrease registered in 1975 (-0.2 per cent), cattle and calf numbers, according to the last cattle census in February, fell to 4.694 million head, a drop of 1 per cent. Although it would seem that beef cattle numbers have increased slightly, the data available show that with the exception of steers, which statistically include bulls and which increased by 35,000 head, all the other categories of cattle diminished: dairy cows and heifers by 54,000 head, and beef cows and heifers by 30,000 head. It is admitted that cattle numbers could recover again as from the current year. Slaughter

levels for the first six months of 1987 fell by 2.4 per cent and the fall was entirely due to a drop in female cattle and calf slaughter, which seems to confirm this projection. Resulting from the increase of adult male cattle in the slaughter mix, sharply higher average slaughter weights (+4.6 per cent) in the first six months of the year allowed production to rise by 2.7 per cent, to 263,000 tons, in spite of lower slaughter levels. It may be expected that this trend will have continued during the rest of the year, and production may have totalled some 580,000 tons, up by almost 4 per cent

58. With a rise of around 9 per cent from January to June 1987, the estimated consumption of bovine meat (both total and per capita) equalled or even surpassed the annual average rates of increase of the 1970's. Furthermore, this rise largely exceeded the consumption increases of both pigmeat (3.4 per cent) and poultry meat (7.3 per cent). The causes for such a development could have been related to an expected cut in retail prices following the measures introduced by the Japanese authorities in the course of 1986 and up to end 1986 and the reduction of stabilization prices in March 1987.[1] However, an analysis of price statistics shows an increase of around 1 per cent on the average retail prices for beef. This seems to suggest that those measures have not yet had much impact at the retail level. In fact, wholesale prices declined (by 2.7 per cent for table grade and 5.3 per cent for manufacturing grade) probably not only as a result of productivity improvement, but also as a result of lower import prices of feedgrains and beef resulting from a sharply strengthened yen. Furthermore, statistics also show a 2 per cent decline of the average retail price for pigmeat, which is more than two times lower than the beef price, rendering the beef consumption increase even more impressive.

59. Reflecting the rise in demand, imports of beef and veal during the first half of 1987 jumped from 115,000 tons last year to 144,000 tons (+25.2 per cent). Live cattle imports also rose markedly, by 22.6 per cent, to 19,000 head (excluding breeding cattle). The two major suppliers of the Japanese market benefited largely from these increased imports. Australia saw its beef exports rise by 13.3 per cent, to 51,000 tons (product weight), but it was the United States, which with a 28 per cent increase, to 38,000 tons (product weight), saw its market share rise the most from 33 per cent year earlier, to 40 per cent. Last August, the Japanese authorities announced an increase in the global import quota, which for the current fiscal year (1 April 1987-31 March 1988) brought it to 214,000 tons (boneless weight

JAPAN - BEEF AND VEAL IMPORTS



[1] See "The International Markets for Meat - 1986/87", paragraph 53, and IMC/W/59, paragraph 28.

basis). This represents a 37,000-ton increase over the expected amount, resulting from various understandings with some exporting countries. Taking into account that these understandings expire in March 1988, it can be assumed that they will be renegotiated.

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
Cattle and calf numbers:1/	4,742.0	4,694.0 3/	-1.0	4,730.0 3/	0.8
Beef and veal:2/					
Production	559.0	580.0 3/	3.8	580.0 3/	-0.0
Consumption	829.0	880.0 3/	6.2	930.0 3/	5.7
Imports	272.0	318.0 4/	16.9	350.0 4/	10.1

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

3/ Source: USDA, World Livestock and Poultry Situation, September 1987

4/ Secretariat estimate

IV. SUMMARY OF SITUATION IN CERTAIN COUNTRIES NOT SIGNATORIES OF THE ARRANGEMENT REGARDING BOVINE MEAT

SOVIET UNION*

60. Cattle and calf numbers on state and collective farms were estimated to have fallen by 0.5 per cent, to 95.4 million head as at 1 November 1987. From January to October, cattle and calf slaughter increased by 6.8 per cent, to 9.7 million tons (live weight). During this period production is estimated to have risen slowly reflecting slightly increased herds in early 1987, but higher average slaughter weights. Since the summer, production has been boosted by accelerated slaughterings, which seem to be due to the desire to benefit from premiums set for better quality and over-fulfilment of plan. Furthermore, reported regional health problems may also have contributed to higher slaughterings. As a result, beef production may have risen by 3-4 per cent to close to 8 million tons. Pig and sheep numbers are also estimated to have fallen by 3.4 per cent and 0.6 per cent respectively. In the pig sector, temporary problems of feed supply because of delayed harvest may have led to some additional slaughterings. Poultry numbers increased by 2.3 per cent. As a result, pigmeat and poultry meat estimated production was 3 per cent higher than in 1986. In the current year, beef and veal production is expected to stagnate or even decline somewhat, pigmeat and sheepmeat output being projected to decrease and poultry meat production to continue to rise, albeit at a slower rate than last year.

61. Production developments in 1987 suggest that imports of beef and veal may not have changed dramatically from year earlier, while the expected total meat production drop (of around 3 per cent) for 1988 indicates that imports might well increase this year.

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
Cattle and calf numbers:[1]	95,900.0	95,400.0	-0.5	95,500.0	0.1
Beef and veal:[2],[3]					
Production	7,700.0	7,970.0	3.5	7,950.0	-0.3
Consumption	8,028.0	8,435.0	5.1	8,500.0	0.8
Imports	335.0	342.0	2.1	370.0	8.2

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

3/ Source: USDA, World Livestock and Poultry Situation, FL&P 1-87, September 1987 and secretariat estimates

*On the basis of information supplied by the United Nations Economic Commission for Europe.

CHILE

62. Revised cattle numbers indicating a 5.2 per cent drop for 1986, showed that the herd liquidation initiated in 1983 continued during 1986. Nevertheless, data for the beginning of 1987 suggested an upturn of 1.1 per cent to 3,257,000 head. A similar increase is expected in 1988. Beef production was projected at 187,200 tons in 1987, up by 1.6 per cent, and a further rise is expected for 1988. Veal production, which declined in 1985 and 1986, recovered somewhat in 1987. All the meat produced is consumed domestically and per capita consumption (around 15.4 kg. in 1987) having declined since 1984, is anticipated to recover as from 1988. Imports of fresh, chilled and frozen beef and veal, largely from Argentina, continued to fall in 1987, down by some 37.4 per cent on year earlier (and by 70 per cent on the 1985 level) and are expected to drop further in 1988.

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
Cattle and calf numbers:[1/]	3,222	3,257	+1.1	3,300	+1.3
Bovine meat:[2/]					
Production	184	187	+1.6	194	+3.9
Consumption	187	189	+1.0	196	+3.7
Imports[3/]	2.9	1.8	-37.4	1.5	-16.7

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

VENEZUELA

63. Cattle numbers in Venezuela amounted to 12,908,000 head in 1987, 3 per cent more than year earlier, continuing the herd expansion of the last several years (+19.6 per cent compared to 1980). Beef production fell for the fourth year in a row and, with a 19.1 per cent drop to around 72,000 tons, probably reached an historical low. According to revised data, Venezuela, which was self-sufficient in beef until 1985, shows a production deficit in both 1986 and 1987. In 1987 consumption (in spite of a per capita decline of more than 20 per cent) exceeded production by almost 30,000 tons. Although no data are available, this suggests increased imports of bovine meat, or live cattle. Unofficial reports suggest that cattle smuggled from Colombia could amount to as much as 300,000 head per year. Furthermore, in order to stop the erosion of beef and veal consumption, reportedly due to strong speculation, the Government should have imported some 25,000 tons of bovine meat during 1987.

	1985	1986	%Change 1986/85	Estimates 1987	%Change 1987/86
Cattle and calf numbers:1/	12,167.0	12,532.0	+3.0	12,908.0	+3.0
Beef and veal:2/					
Production	101.1	88.9	-12.1	71.9	-19.1
Consumption	101.1	96.6	-4.5	99.5	+3.0
Exports3/	0.0	3,380.0	-	3,380.0	0.0

1/'000 head 2/'000 tons 3/Live cattle, head

MOROCCO*

64. After five years of herd liquidation, cattle numbers in Morocco amounted to 2,851,000 head in 1986 (+14 per cent), continuing the herd expansion initiated in 1985. Beef and veal production, which fell along with cattle numbers, reached 513,241 tons in 1986, up by 14 per cent from year earlier. Morocco imports certain quantities of beef regularly. In 1986 these imports totalled close to 5,500 tons, up by 32 per cent on year earlier. Morocco also imports significant quantities of live cattle and calves which, in 1986, reached the record level of 20,770 head, almost four times higher than in 1985. Available data for the first five months of 1987 suggest that imports of both bovine meat and live cattle could rise further in 1987.

	1984	1985	%Change 1984/85	1986	%Change 1986/85
Cattle and calf numbers:1/	2,363	2,501	+5.8	2,851	+14.0
Beef and veal:2/					
Production	425	480	+12.9	513	+6.9
Imports	5.2	4.4	-15.4	6.0	+36.4

1/'000 head 2/'000 tons

*Data concerning 1987 and 1988 are scarce or not available

GHANA*

65. After a slight decline in 1985, probably due to droughts, cattle herds in Ghana rose by 1.3 per cent, to 1,554,000 head in 1986. Cattle numbers have risen sharply in the last few years, and since the beginning of the decade, have more than doubled. Apparently reflecting lower cattle slaughters, production of beef and veal fell by 4.2 per cent in 1986, to close to 15,000 tons. Since 1980 and in spite of important variations from year to year, beef and veal output has risen by an annual average of almost 12 per cent. Virtually all the meat produced is consumed locally. Consequently, it can not only be assumed that total consumption has risen annually by the same percentage, but also that, like in many other African countries, the potential for strongly increased consumption is there. Indeed, it can be estimated that per capita consumption of beef and veal scarcely exceeds 1 kg. Ghana has imported 1,000 to 1,600 live animals per year over the last four to five years, and declining quantities of bovine meat (around 5,000 tons in 1982 and no more than some 90 tons in 1984). In 1986 there were no imports at all.

	1984	1985	%Change 1985/84	1986	%Change 1986/85
Cattle and calf numbers:1/	1,543.0	1,533.6	-0.6	1,554.0	1.3
Beef and veal:2/					
Production	14,344.0	15,300.0	6.7	14,663.0	-4.2
Consumption	14,344.0	15,300.0	6.7	14,663.0	-4.2
Imports	88.7	0.0	-100.0	0.0	0.0

1/ '000 head 2/ '000 tons

PAPUA NEW GUINEA

66. Estimated beef and veal production in 1987 increased by 11 per cent to 2,950 tons. There has also been a rise, albeit slower, in total beef and veal consumption (+5.9 per cent), while per capita intake increased by 5.3 per cent. Papua New Guinea is far from being self-sufficient in bovine meat (in 1987 only some 37 per cent of the meat consumed was domestically

*Data for 1987 and 1988 are not available produced) and has been importing on average 10 to 12 thousand tons of beef and veal per year over the last decade. It is estimated that in 1987, imports dropped by some 7.2 per cent on year earlier, reaching 10,950 tons.

	1985	1986	%Change 1986/85	Estimates 1987	%Change 1987/86
Cattle and calf numbers:	...	...	...	...	...
Beef and veal:[1/]					
Production	2.2	2.7	+22.7	3.0	+11.1
Consumption	6.9	7.5	+8.7	7.9	+5.3
Imports	16.0	11.8	-26.3	11.0	-6.8

1/ '000 tons

V. SITUATION AND OUTLOOK IN THE INTERNATIONAL PIGMEAT SECTOR

67. Estimates by the secretariat suggest that world production of pigmeat, after rising by more than earlier expected in 1986 (+3 per cent), has fallen by around 1 per cent in 1987 to some 56.2 million tons. This was by and large due to an estimated 6 per cent drop in the production of the world's largest producer of pigmeat: China. At close to 17 million tons, roughly 30 per cent of the world's total output, Chinese production was about 1 million tons below year earlier. The reasons for this decline were basically feedgrain shortages (partly provoked by strong corn exports) and consequently strongly increased prices (reportedly, 70 per cent of feedgrains are now sold on the free market, at higher prices than those offered by the Government). As a result, an increasing number of farmers would be shifting from pig to more profitable cattle or sheep raising. Pig numbers fell and sow slaughter increased markedly from the end of 1986 up to, and during, recent months. However, official reports indicate that sow slaughter is easing and measures introduced by the Government are expected to alleviate the pressure on feedgrain prices. Chinese output of pigmeat is thus projected to recover in the current year.

68. In 1987, and with the possible exception of the USSR (fourth world producer with an estimated 5.850 million tons, or 10 per cent of the world total), production has increased in virtually all other major producing countries or areas. In the European Community, the world's second producer with a 22 per cent share, it is estimated to show a 2.1 per cent rise, to 12,500,000 tons. In the United States (third world producer with an 11 per cent share) it grew to 6,420,000 tons (+0.7 per cent) and in Japan by an estimated 1.5 per cent, to 1.573 million tons. The reason for these increases has generally been lower production costs provoked by low feedgrain prices. With practically all these countries projecting higher production levels and the above-mentioned increase in China, the world's pigmeat output should rise by 4-5 per cent, to some 58,600 million tons in 1988.

69. World trade of pigmeat, which represents only some 3 per cent of production, seems to have risen by some 7-8 per cent in 1987. World exports would have totalled slightly more than 1,800 million tons and the rise was essentially due to higher exports by a number of eastern European countries (Democratic Republic of Germany, Poland and Romania), Yugoslavia and Taiwan. Exports were also up in Canada, while the EC, which introduced storage aid in January 1986, and is faced with increasing stocks, should have exported roughly the same quantities as in 1986. Stimulated by higher consumption, especially in Japan, imports are estimated to have risen in the United States, Japan and Hong Kong by 4-5 per cent, while they should have remained stable in the USSR. The projected production rise for 1988 should occur not only in some major exporting countries, but also in some major importing ones. Consequently, it can be expected that next year, international trade in pigmeat will shrink and will be faced with strongly increased competition.

TABLE III

SELECTED COUNTRIES' TRADE IN PIGMEAT[1]

IMPORTS

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
UNITED STATES[2]	509.0	533.0	4.7	510.0	-4.3
JAPAN[2]	297.0	310.0	4.4	340.0	9.7
HONG KONG[2]	221.0	230.0	4.1	235.0	2.2
USSR[2]	261.0	260.0	-0.4	260.0	0.0
EC	105.0	70.0	-33.3	70.0	0.0
POLAND	16.0	24.0	50.0	30.0	25.0
BRAZIL	38.0	70.0	84.2	2.0	-97.1
OTHERS	79.0	85.0	7.6	64.0	-24.7
TOTAL	1,526.0	1,582.0	3.7	1,511.0	-4.5

EXPORTS

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
EC	377.0	394.0	4.5	394.0	0.0
CHINA[2]	238.0	247.0	3.8	266.0	7.7
CANADA	215.0	240.0	11.6	270.0	12.5
GERMANY, DEM. REP.[2]	210.0	230.0	9.5	220.0	-4.3
HUNGARY[2]	133.0	145.0	9.0	160.0	10.3
ROMANIA[2]	135.0	140.0	3.7	150.0	7.1
TAIWAN[2]	123.0	155.0	26.0	155.0	0.0
POLAND	106.0	112.0	5.7	122.0	8.9
SWEDEN	53.0	37.0	-30.2	21.0	-43.2
UNITED STATES	39.0	45.0	15.4	54.0	20.0
OTHERS	95.0	127.0	33.7	143.0	12.6
TOTAL	1,724.0	1,872.0	8.6	1,955.0	4.4

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

[2] Source: USDA, World Livestock and Poultry Sitaution, September 1987

VI. SITUATION AND OUTLOOK IN THE INTERNATIONAL POULTRY MEAT SECTOR

70. Boosted by low feedgrain prices (especially over the last few years), increased demand and a well integrated industry in a rising number of countries, world production of poultry meat has risen by around 30 per cent since the beginning of the decade. In 1987, and compared to a year earlier, the increase can be estimated at around 6 per cent, to slightly more than 29 million tons. This is the strongest rate of increase of the last few years, and (although once again it reflects higher production for most countries for which data are available) was largely due to a 10 per cent rise in the United States. By far the world's leading producer of poultry meat (around 30 per cent of world production), this country produced more than 9 million tons of poultry meat in 1987. With production costs sharply down, largely due to depressed feedgrain prices, lower beef supplies and an expanding demand for poultry meat, conditions are set for output to continue to rise. Indeed, consumption is expected to increase by almost 9 per cent, to more than 8.5 million tons, reflecting not only low retail prices, but also the supply of a large variety of products. Although prices continue to slide down, and profitability margins shrink, there still seems to be room for further production rises and indeed, current estimates suggest a 5 per cent increase for 1988.

71. In the European Community, the world's second largest producer of poultry meat with a 20 per cent share, poultry meat production in 1987 is estimated to have increased by 4.5 per cent (to 5,690,000 tons), following higher than expected placings of broiler chicks. As in the United States (and indeed in many other countries), production costs are down and, even though prices are depressed, they are still profitable and supported by strong and rising demand. While the output growth in the USSR is estimated to have accelerated (+7 per cent, to 3.1 million tons), in Brazil and as in 1986, production was boosted by strong domestic demand resulting from the relatively low availabilities of red meat. The increase is estimated at 12 per cent, to 1,900,000 tons.

72. World trade of poultry meat is estimated to have expanded markedly in 1987. Exports may have been around 1.4 million tons, 10 per cent more than last year. The United States alone accounted for some 85 per cent of the increase (up by 90,000 tons on year earlier), largely as a result of the Export Enhancement Programme (EEP) and thus became the first world exporter of poultry meat. The EEP[1] for poultry meat is targeted at Egypt, the Canary Islands, Iraq and the Dominican Islands, and the quantity available under the programme for export to these countries is, for the 1986/1988 fiscal years, 140,500 tons. While the EC, Hungary and Romania reported increased exports, the other major world exporter, Brazil, saw its sales abroad decline.

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[1] See also page 33, paragraph 48

73. The European Community, world export leader for many years, estimates exports to have risen by 3 per cent to 340,000 tons in 1987. Exports to the Middle East (where the Community retains the largest market share) may have increased somewhat. Reflecting strong domestic demand, Brazilian exports are estimated to have fallen by 2.5 per cent. In order to overcome this shortage of export availabilities, the authorities implemented a feedgrain price support for the production of poultry meat aimed at the export markets. Thailand has emerged as a major exporting country in recent years and, with more than 90,000 tons sold in 1987, should rank fifth world exporter. Its major market was Japan.

74. Import demand continued to decline in the Middle East (the increase in total imports there is largely due to the United States sales to Irak under the EEP), and especially in Saudi Arabia where a 25 per cent drop in imports was expected. Poultry meat output, supported by strongly growing demand, has risen steadily in these countries in the last few years as the result of efforts to increase self-sufficiency. However, some sources suggest that consumption of poultry meat may now be reaching its saturation level in most of this region's countries. Without a doubt, the best market opportunities developed during 1987 were in the region of Asia. Japanese imports (which accounted for more than 80 per cent of the region's import rise) went up by 15 per cent, due to sharply increased consumption and a strong yen. Imports by other countries, such as Hong Kong were also higher. At this stage, it is difficult to make projections for the short to medium term. However, poultry meat trade is expected to decline somewhat in 1988.

TABLE IV

SELECTED COUNTRIES' TRADE IN POULTRY MEAT[1]

IMPORTS

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
MIDDLE EAST[2]	249.0	270.0	8.4	225.0	-16.7
USSR[2]	175.0	155.0	-11.4	150.0	-3.2
HONG KONG[2]	123.0	128.0	4.1	130.0	1.6
JAPAN[2]	175.0	201.0	14.9	206.0	2.5
EGYPT[2]	50.0	65.0	30.0	85.0	30.8
EC	69.0	88.0	27.5	85.0	-3.4
OTHERS	147.0	151.0	2.7	137.0	-9.3
TOTAL	988.0	1,058.0	7.1	1,018.0	-3.8

EXPORTS

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
UNITED STATES[2]	276.0	365.0	32.2	318.0	-12.9
EC	329.0	340.0	3.3	310.0	-8.8
BRAZIL	236.0	230.0	-2.5	250.0	8.7
HUNGARY[2]	181.0	210.0	16.0	210.0	0.0
THAILAND	76.0	91.0	19.7	100.0	9.9
ROMANIA[2]	60.0	70.0	16.7	80.0	14.3
BULGARIA	29.0	20.0	-31.0	20.0	0.0
OTHERS	109.0	94.0	-13.8	105.0	11.7
TOTAL	1,296.0	1,420.0	9.6	1,393.0	-1.9

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

[2] Source: USDA, World Livestock and Poultry Situation, September 1987.

VII. SITUATION AND OUTLOOK IN THE INTERNATIONAL SHEEPMEAT SECTOR

75. Depending on the sources, world production of sheepmeat is estimated at around 5.4 to 6.2 million tons annually. Available data suggest a production level of 5,470,000 tons for 1987, up by some 1 per cent from year earlier. This was by and large due to a 6 per cent rise (to 952,000 tons) in the European Community which, when Spain and Portugal joined, became the first world producer of sheepmeat, followed by the USSR. In New Zealand, the world's leading exporter of sheepmeat (more than 50 per cent of world trade), production fell by 1.2 per cent in the season ending last September. Mutton production increased sharply (24.4 per cent) reflecting the carry-over provoked by the 1986 strikes, but lamb output fell by almost 13 per cent due to low producer prices and strongly reduced carcass weights. In the current season, however, lamb production is recovering, while that of mutton should decline. Overall sheepmeat production is expected to go up by close to 1 per cent. In Australia, the sheep industry profitability continues to expand as a consequence of rising prices for wool, skins and meat. In the 1986/87 season, sheepmeat output followed the same trends as in New Zealand and rose by 1 per cent. Mutton production rose by 12 per cent, while that of lamb fell by 8 per cent. In the current season, mutton output is projected to decline by 7 per cent reflecting flock expansion, while lamb production is expected to rise by 5 per cent.

76. Provoked by the strikes of early in the year and the withdrawal of support schemes, New Zealand exports of sheepmeat fell by 11 per cent in 1986, to 519,000 tons. In the current year, and although there has been a return to more normal conditions, exports may still have fallen by around 1 per cent. Australian sheepmeat exports rose by 35 per cent to 158,000 tons in 1986, benefiting from the difficult supply situation in New Zealand. During the first eight months of 1987, exports fell by 0.7 per cent, and are estimated to fall by 2 per cent by the year end. Although not much information is available, market conditions reportedly remain interesting due to strong import demand in the Middle East, Japan and North America, but this will probably not impede exports by both countries from declining further in 1988.

TABLE V

SELECTED COUNTRIES' TRADE IN SHEEPMEAT[1]

IMPORTS

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
EC	249.0	248.0	-0.4	253.0	2.0
JAPAN[2]	159.0	155.0	-2.5	160.0	3.2
USSR[2]	39.0	42.0	7.7	43.0	2.4
EGYPT[2]	6.0	7.0	16.7	8.0	14.3
OTHERS	41.0	52.0	26.8	54.0	3.8
TOTAL	494.0	504.0	2.0	518.0	2.8

EXPORTS

	1986	Estimates 1987	%Change 1987/86	Forecast 1988	%Change 1988/87
NEW ZEALAND	519.0	513.0	-1.2	504.0	-1.8
AUSTRALIA[2]	158.0	155.0	-1.9	152.0	-1.9
ROMANIA[2]	45.0	45.0	0.0	45.0	0.0
TURKEY[2]	35.0	35.0	0.0	40.0	14.3
BULGARIA[2]	30.0	30.0	0.0	30.0	0.0
INDIA[2]	15.0	21.0	40.0	24.0	14.3
KOREA, Rep. of[2]	14.0	14.0	0.0	15.0	7.1
OTHERS	43.0	48.0	11.6	48.0	0.0
TOTAL	859.0	861.0	0.2	858.0	-0.3

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

[2] Source: USDA, World Livestock and Poultry Situation, September 1987.

ANNEX

STATISTICAL TABLES

SYMBOLS: **THE FOLLOWING SYMBOLS HAVE BEEN USED IN THE SUMMARY TABLES:**

. NOT AVAILABLE

- NIL OR NEGLIGIBLE

NOTE: **IN THE FOLLOWING TABLES A LARGE PART OF THE FIGURES HAVE BEEN ROUNDED. DATA ARE TAKEN FROM REPLIES TO THE QUESTIONNAIRE UNLESS OTHERWISE STATED.**

TABLE 1 - TOTAL CATTLE AND CALF NUMBERS('000 HEAD) 5

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
RGENTINA (30/6) 2	53,900	54,600	54,000	52,500	-2.78	51,000	-2.86	50,500	.
OF WHICH COWS	20,800	21,000	20,600	20,300	-2.40	.	.	.	.
USTRALIA (31/3) 1	22,478	22,161	22,784	23,436	2.86	23,263	-0.74	23,282	24,152
OF WHICH COWS	9,303	9,199	9,483	9,705	2.34	9,525	-1.85	.	.
USTRIA (3/12) 6,8	2,546	2,633	2,669	2,655	-0.52	2,687	1.21	2,611	.
OF WHICH COWS	1,218	1,254	1,269	1,247	-1.73	1,243	-0.32	.	.
RAZIL ( ) 1	128,951	132,801	126,391	128,925	2.00	131,503	2.00	134,133	136,814
OF WHICH COWS	42,040	42,878	41,206	42,027	1.99	42,868	2.00	43,725	44,599
ULGARIA (1/1) 2	1,783	1,778	1,751	1,706	-2.57	1,678	-1.64	1,660	.
OF WHICH COWS	702	695	686	670	-2.33	653	-2.54	.	.
ANADA (1/1)	11,618	11,360	10,980	10,591	-3.54	10,493	-0.93	10,587	10,783
OF WHICH COWS	4,978	4,967	4,788	4,622	-3.47	4,622	0.00	4,677	4,774
OLOMBIA ( ) 1	24,275	24,476	24,000	23,593	-1.70	23,971	1.60	24,451	24,817
OF WHICH COWS	8,957	8,884	8,784	10,010	13.96	10,022	0.12	10,153	.
C (31/12) 1,3,6	78,791	79,728	78,766	83,675	6.23	81,915	-2.10	80,000	.
OF WHICH COWS	31,351	31,670	31,072	33,545	7.96	33,080	-1.39	32,500	.
NLAND (15/12) 6,7	1,633	1,588	1,592	1,567	-1.57	1,485	-5.23	1,440	1,417
OF WHICH COWS	683	658	651	623	-4.30	608	-2.41	589	574
NGARY (1/1) 2	1,922	1,907	1,901	1,766	-7.10	1,690	-4.30	1,660	.
OF WHICH COWS	751	735	725	688	-5.10	.	.	.	.
PAN (1/2) 8	4,590	4,682	4,698	4,742	0.94	4,694	-1.01	4,730	.
OF WHICH COWS	2,140	2,152	2,128	2,139	0.52	2,073	-3.09	.	.
W ZEALAND (30/6) 1	7,631	7,776	7,921	8,279	4.52	8,000	-3.37	8,160	8,447
OF WHICH COWS	3,722	3,759	3,814	3,814	0.00	.	.	1,520	1,540

TABLE 1 - TOTAL CATTLE AND CALF NUMBERS('000 HEAD) 5

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	1989
ORWAY (20/6) 4	1,022	1,002	1,010	1,000	-0.99	996	-0.40	994	994
OF WHICH COWS	394	395	395	381	-3.54	367	-3.67	361	355
OLAND (30/6) 2	11,296	11,197	11,055	10,919	-1.23	10,523	-3.63	10,400	.
OF WHICH COWS	5,776	5,759	5,528	5,207	-5.81	4,936	-5.20	.	.
OMANIA (31/1) 8	6,246	6,752	7,039	7,077	0.54	7,250	2.44	7,325	.
OF WHICH COWS	3,031	.	3,095	.	.	.	.	.	.
OUTH AFRICA (31/8)	8,204	7,923	7,827	7,828	0.01	7,919	1.16	8,100	8,300
OF WHICH COWS	3,973	3,944	3,866	3,973	2.77	3,982	0.23	.	.
WEDEN (30/6) 1	1,902	1,878	1,838	1,715	-6.69	1,664	-2.97	1,640	1,631
OF WHICH COWS	724	717	705	656	-6.95	631	-3.81	624	620
WITZERLAND (21/4) 2	1,933	1,943	1,926	1,902	-1.25	1,858	-2.31	1,900	.
OF WHICH COWS	1,001	1,000	974	970	-0.41	959	-1.13	.	.
UNISIA ( )	606	615	637	661	3.77	686	3.78	713	.
OF WHICH COWS	334	343	353	367	3.97	381	3.81	396	.
NITED STATES (1/1) 1	115,001	113,700	109,749	105,468	-3.90	102,031	-3.26	100,162	.
OF WHICH COWS	49,600	48,700	36,250	.	.	.	.	.	.
RUGUAY (30/6) 1	9,704	9,062	9,370	9,303	-0.72	9,855	5.93	10,111	.
OF WHICH COWS	3,554	3,519	3,633	3,602	-0.85	3,776	4.83	3,900	.
UGOSLAVIA (15/1) 1,2	5,351	5,341	5,199	5,034	-3.17	5,030	-0.08	5,037	.
OF WHICH COWS	3,050	3,005	2,997	2,915	-2.74	2,893	-0.75	.	.

1 1987: estimates	2 1988: secretariat estimates	3 EEC(12) since 1 January 1988
4 1986: 1 June	5 In brackets: census date	6 Previous year
7 1986 and 1987: 1/12	8 Source: USDA, World Livestock and Poultry Situation, September 1987: Austria 1988	

TABLE 2 - CATTLE AND CALF SLAUGHTER ('000 HEAD)

OUNTRY		1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
RGENTINA	- ADULT CATTLE 4,6	10,400	11,200	12,100	12,400	2.48	12,800	.	12,000	.
	- CALVES	800	1,100	1,600	1,600	0.00	.	.	.	.
USTRALIA	- ADULT CATTLE 1	6,645	5,608	5,958	6,606	10.88	6,675	1.04	6,030	6,300
	- CALVES	1,474	1,217	1,193	1,261	5.70	1,236	-1.98	1,198	1,234
USTRIA	- ADULT CATTLE 4,6	563	624	658	671	1.98	850	.	851	.
	- CALVES	181	192	188	199	5.85	.	.	.	.
RAZIL	- ADULT CATTLE 4,6	11,433	10,176	10,559	8,700	-17.61	10,800	.	10,150	10,450
	- CALVES	92	39	50	33	-34.00	.	.	50	50
ULGARIA	- ADULT CATTLE 1,4,6	160	160	161	590	.	605	2.54	605	.
	- CALVES	415	422	417	.	.	.	.	.	.
ANADA	- ADULT CATTLE	3,341	3,215	3,274	3,235	-1.19	3,005	-7.11	2,915	2,959
	- CALVES	649	689	665	664	-0.15	595	-10.39	411	391
OLOMBIA	- ADULT CATTLE 1,4,5	3,040	3,181	3,224	3,304	2.48	3,296	-0.24	3,260	.
	- CALVES	.	.	.	.	.	.	.	.	.
C	- ADULT CATTLE 1,2	20,930	22,700	22,261	23,969	7.67	24,140	0.71	23,150	.
	- CALVES	6,858	7,306	7,087	7,808	10.17	7,610	-2.54	7,350	.
NLAND	- ADULT CATTLE 3	555	576	586	577	-1.54	579	0.35	580	.
	- CALVES	65	60	49	42	-14.29	43	2.38	42	.
ATEMALA	- ADULT CATTLE	77	.	96	34	-64.58	.	.	.	.
	- CALVES	.	.	.	.	.	.	.	.	.
NGARY	- ADULT CATTLE 3,4,6	464	406	463	367	-20.73	373	.	356	.
	- CALVES	3	4	6	6	0.00	.	.	.	.
PAN	- ADULT CATTLE 4,6	1,388	1,492	1,536	1,524	-0.78	1,550	.	1,540	.
	- CALVES	45	44	39	30	-23.08	.	.	.	.

TABLE 2 - CATTLE AND CALF SLAUGHTER ('000 HEAD)

OUNTRY		1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
EW ZEALAND	- ADULT CATTLE	2,086	1,860	1,848	2,074	12.23	2,234	7.71	2,126	2,151
	- CALVES	926	829	849	946	11.43	850	-10.15	820	850
ORWAY	- ADULT CATTLE 3	333	313	327	330	0.92	322	-2.42	328	334
	- CALVES	63	58	58	38	-34.48	37	-2.63	40	42
OLAND	- ADULT CATTLE 4,6	3,008	3,132	3,291	3,435	4.38	3,713	.	3,570	.
	- CALVES	1,611	1,520	1,229	1,190	-3.17	.	.	.	.
OMANIA	- ADULT CATTLE 4,6	1,508	1,416	1,582	1,350	-14.66	1,525	12.96	1,525	.
	- CALVES	.	.	.	.	.	.	.	.	.
OUTH AFRICA	- ADULT CATTLE 1	2,215	2,358	2,272	2,205	-2.95	2,114	-4.13	1,983	2,095
	- CALVES	99	102	104	98	-5.77	75	-23.47	70	74
WEDEN	- ADULT CATTLE 1	603	577	584	547	-6.34	510	-6.76	500	504
	- CALVES	114	123	138	127	-7.97	80	-37.01	78	70
WITZERLAND	- ADULT CATTLE 3,4,6	441	474	489	495	1.23	485	-2.02	828	.
	- CALVES	353	358	351	347	-1.14	335	-3.46	.	.
UNISIA	- ADULT CATTLE 4	244	222	260	.	.	.	.	.	.
	- CALVES	.	.	.	.	.	.	.	.	.
NITED STATES	- ADULT CATTLE 1,3	36,974	37,892	36,593	37,568	2.66	35,904	-4.43	34,364	.
	- CALVES	3,162	3,367	3,455	3,478	0.67	2,900	-16.62	2,650	.
RUGUAY	- ADULT CATTLE 1	2,057	1,418	1,499	1,522	1.53	1,244	-18.27	1,348	.
	- CALVES	171	85	95	99	4.21	80	-19.19	87	.
UGOSLAVIA	- ADULT CATTLE 4,6	1,444	1,540	1,495	1,359	-9.10	2,285	.	2,220	.
	- CALVES	840	862	891	816	-8.42	.	.	.	.

1 Estimates: Bulgaria all years, others 1987
2 EEC(12) since 1 January 1986
3 Inspected only: Finland 1986-87; Switzerland 1987; others all years
4 Total slaughter: Bulgaria 1986-88, Switzerland 1988, others 1987-88
5 1986-88: including buffaloes
6 Source: USDA, World Livestock and Poultry Situation, September 1987: Romania all years; Bulgaria 1986-88; Brazil 1987; Switzerland 1988; others 1987-88

TABLE 3 - BEEF AND VEAL PRODUCTION ('000 METRIC TONS, CARCASS WEIGHT)

COUNTRY		1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
ARGENTINA	- BEEF 5	2,295.0	2,428.0	2,575.0	2,690.0	4.46	2,700.0	.	2,550.0	.
	- VEAL	95.0	130.0	175.0	180.0	2.85	.	.	.	.
AUSTRALIA	- BEEF 2	1,361.5	1,232.7	1,298.9	1,436.0	10.55	1,502.1	4.60	1,446.9	1,443.0
	- VEAL	51.8	39.2	38.9	42.0	7.96	40.9	-2.61	41.1	43.0
AUSTRIA	- BEEF 5,7	187.7	203.4	211.6	233.0	.	227.0	-2.57	227.0	.
	- VEAL	15.7	16.8	16.4	.	.	.	.	.	.
BRAZIL	- BEEF 2	2,351.0	2,149.0	2,218.0	1,866.0	-15.87	2,146.0	15.00	2,246.0	2,296.0
	- VEAL	8.0	4.0	4.0	4.0	0.00	4.0	0.00	4.0	4.0
BULGARIA	- BEEF 1,5,7	34.0	34.0	36.0	107.5	.	104.0	-3.25	104.0	.
	- VEAL	98.0	99.0	98.0	.	.	.	.	.	.
CANADA	- BEEF	993.0	951.8	988.9	991.7	0.28	922.0	-7.02	894.0	903.0
	- VEAL	41.6	44.7	45.7	48.3	5.68	43.5	-9.93	40.0	38.0
COLOMBIA	- BEEF 2,3,5	210.6	208.7	221.3	596.0	.	579.1	-2.83	590.2	604.0
	- VEAL	365.3	385.4	369.0	.	.	.	.	.	.
EEC	- BEEF 2,4	6,124.0	6,639.0	6,549.0	7,066.0	7.89	7,095.0	0.41	6,810.0	.
	- VEAL	800.0	868.0	872.0	1,004.0	15.13	980.0	-2.39	945.0	.
FINLAND	- BEEF 2	117.6	123.3	125.4	124.3	-0.87	122.5	-1.44	119.5	.
	- VEAL	0.9	0.9	0.7	0.6	-14.28	0.5	-16.66	0.5	.
HUNGARY	- BEEF 5,7	138.0	129.7	130.5	105.3	-19.31	98.5	.	97.0	.
	- VEAL	0.1	0.2	0.4	0.3	-25.00	.	.	.	.
JAPAN	- BEEF 5,6	492.0	533.0	554.0	557.0	0.54	580.0	.	580.0	.
	- VEAL	2.3	2.4	2.3	1.9	-17.39	.	.	.	.
NEW ZEALAND	- BEEF	474.8	445.3	438.0	493.0	12.55	547.2	10.99	506.0	470.0
	- VEAL	18.2	14.3	14.5	16.0	10.34	15.0	-6.25	16.0	15.0

TABLE 3 - BEEF AND VEAL PRODUCTION ('000 METRIC TONS, CARCASS WEIGHT)

COUNTRY		1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
NORWAY	- BEEF	72.5	67.4	70.8	72.7	2.68	72.2	-0.68	73.5	74.9
	- VEAL	2.5	2.2	2.3	2.1	-8.69	1.9	-9.52	2.0	2.1
POLAND	- BEEF 5	559.0	604.0	645.0	673.0	4.34	699.6	.	664.0	.
	- VEAL	51.0	46.0	35.0	33.0	-5.71	.	.	.	.
ROMANIA	- BEEF 5,6	207.0	201.0	270.0	195.0	-27.77	230.0	17.94	230.0	.
	- VEAL	.	.	.	.	.	.	.	.	.
SOUTH AFRICA	- BEEF 2	627.7	656.2	639.7	631.8	-1.23	599.8	-5.06	592.4	599.3
	- VEAL	4.4	4.7	4.7	4.3	-8.51	3.9	-9.30	3.4	3.7
SWEDEN	- BEEF 2	151.0	144.0	145.0	136.0	-6.20	129.0	-5.14	125.0	126.0
	- VEAL	9.0	11.0	12.0	11.0	-8.33	7.0	-36.36	7.0	7.0
SWITZERLAND	- BEEF 2,5	116.7	127.7	132.5	133.8	0.98	132.0	-1.34	165.0	.
	- VEAL	35.5	37.1	36.8	35.6	-3.26	35.0	-1.68	.	.
TUNISIA	- BEEF 5	27.3	29.4	31.8	34.6	8.80	38.5	11.27	41.9	.
	- VEAL	.	.	.	.	.	.	.	.	.
UNITED STATES	- BEEF 2	10,543.0	10,704.0	10,763.0	11,054.0	2.70	10,654.0	-3.61	10,210.0	.
	- VEAL	205.0	225.0	234.0	238.0	1.70	200.0	-15.96	188.0	.
URUGUAY	- BEEF 2	427.0	301.0	332.0	345.0	3.91	277.0	-19.71	300.0	.
	- VEAL	15.0	7.0	8.0	9.0	12.50	7.0	-22.22	7.0	.
YUGOSLAVIA	- BEEF 5,7	357.0	371.0	352.0	339.0	-3.69	340.0	0.29	340.0	.
	- VEAL	.	.	.	.	.	.	.	.	.

1 From 1986 on, only industrial meat production 2 1987: estimate
3 1986-89: include buffalo meat 4 EEC(12) since 1 January 1986
5 Total production, beef and veal: Romania, Tunisia and Yugoslavia all years; Austria, Bulgaria and Colombia 1986-88; Switzerland 1988; others 1987-88 6 Source: USDA, World Livestock and Poultry Situation, September 1987
7 Secretariat estimates: Bulgaria all years, Austria 1986-88, others 1988

TABLE 4 - STOCKS OF BEEF AND VEAL ('000 METRIC TONS, CARCASS WEIGHT)

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
ARGENTINA	55.0	.	.	.	.	.	.	.	.
AUSTRALIA 1	28.2	24.4	29.7	33.1	11.44	.	.	.	.
AUSTRIA	4.0	4.0	5.0	.	.	.	.	.	.
BRAZIL	160.0	20.0	20.0	195.0	875.00	90.0	-53.84	150.0	150.0
CANADA 2	17.8	17.7	23.2	16.6	-28.44	16.7	0.60	16.8	17.8
EEC 3,4	432.0	830.0	885.0	686.0	-22.48	750.0	9.32	550.0	.
FINLAND	5.7	5.1	5.2	5.3	1.92	.	.	.	.
HUNGARY	1.3	4.3	8.0	7.6	-5.00	.	.	.	.
NORWAY	5.8	3.2	3.2	2.1	-34.37	2.5	19.04	2.0	2.0
SOUTH AFRICA 2	15.0	35.1	20.3	0.5	-97.53	0.1	-80.00	0.1	0.1
SWEDEN 2	9.0	14.0	8.0	4.0	-50.00	1.0	-75.00	1.0	1.0
SWITZERLAND 2	0.5	8.3	5.7	9.0	57.89	6.0	-33.33	.	.
TUNISIA	2.6	2.0	1.5	1.2	-20.00	.	.	.	.
UNITED STATES	136.0	151.0	145.0	135.0	-6.89	144.0	6.66	.	.
URUGUAY 2	21.0	10.0	20.0	10.0	-50.00	10.0	0.00	10.0	.

1 Stocks at last Saturday of last month of quarter. Stocks are largerly in boneless form and figures refer only to those held in cold stores registered to handle meat for export.
2 1987: estimate 3 Includes intervention and private stocks 4 EEC(12) since 1 January 1986
Note: stocks at the end of the year, unless otherwise specified

TABLE 5 - BEEF AND VEAL CONSUMPTION ('000 METRIC TONS, CARCASS WEIGHT AND KG./CAPITA)

COUNTRY		1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
ARGENTINA	-TOTAL	1,975.0	2,308.0	2,490.0	2,614.0	4.97	2,413.0	-7.68	2,250.0	.
	-PER CAPITA	67.0	77.0	82.0	64.8	3.41	77.4	-8.72	.	.
AUSTRALIA	-TOTAL2	631.0	663.0	639.0	664.0	3.91	627.0	-5.57	597.0	636.0
	-PER CAPITA	41.0	42.8	40.7	41.8	2.70	38.8	-7.17	36.6	38.1
AUSTRIA	-TOTAL4	174.5	172.0	159.5	169.0	5.95	170.0	0.59	171.0	.
	-PER CAPITA	23.1	22.8	21.1	22.4	6.16	.	.	.	.
BRAZIL	-TOTAL2,4	2,000.0	1,860.0	1,702.0	1,988.0	16.80	1,940.0	-2.41	1,975.0	2,240.0
	-PER CAPITA	15.4	14.0	12.5	14.4	15.20	13.6	-5.55	13.6	15.0
BULGARIA	-TOTAL4	95.0	96.0	96.0	97.0	1.04	98.0	1.03	100.0	.
	-PER CAPITA	.	.	.	.	.	.	.	.	.
CANADA	-TOTAL	1,038.6	1,008.8	1,030.2	1,051.5	2.06	1,026.0	-2.42	1,010.0	1,020.0
	-PER CAPITA	42.1	40.1	40.6	41.1	1.23	39.9	-2.91	39.1	39.0
COLOMBIA	-TOTAL2,3	563.0	577.8	585.8	585.0	-0.13	570.6	-2.46	579.7	.
	-PER CAPITA	20.5	21.5	21.1	19.8	-6.16	19.8	0.00	19.8	.
EEC	-TOTAL1,2	6,631.0	6,808.0	7,025.0	7,567.0	7.71	7,590.0	0.30	7,650.0	.
	-PER CAPITA	24.4	25.0	25.7	23.5	-8.56	23.5	0.00	23.6	.
FINLAND	-TOTAL2	103.8	105.9	99.3	102.6	3.32	104.0	1.36	104.0	.
	-PER CAPITA	21.4	21.7	20.3	20.9	2.95	21.0	0.47	21.0	.
HUNGARY	-TOTAL2,4	88.5	74.4	89.3	88.5	-0.89	89.0	0.56	89.0	.
	-PER CAPITA	8.3	7.0	8.6	8.9	3.48	.	.	.	.
JAPAN	-TOTAL4,5	706.0	757.0	781.0	829.0	6.14	880.0	6.15	930.0	.
	-PER CAPITA	5.9	6.3	6.5	6.8	4.61	.	.	.	.
NEW ZEALAND	-TOTAL2	135.9	127.5	116.2	118.0	1.54	131.0	11.01	130.0	130.0
	-PER CAPITA	42.1	39.4	35.5	36.0	1.40	39.7	10.27	39.0	39.0

TABLE 5 - BEEF AND VEAL CONSUMPTION ('000 METRIC TONS, CARCASS WEIGHT AND KG./CAPITA)

COUNTRY		1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
NORWAY	-TOTAL	68.9	71.7	74.6	79.3	6.30	76.9	-3.02	11.0	77.0
	-PER CAPITA	16.7	17.3	18.0	19.0	5.55	18.4	-3.15	18.4	18.3
POLAND	-TOTAL	580.0	585.0	604.0	631.0	4.47	628.0	-0.47	600.0	.
	-PER CAPITA	15.8	15.8	16.2	16.9	4.32	.	.	.	.
SOUTH AFRICA	-TOTAL2	646.7	684.3	700.6	697.6	-0.42	657.7	-5.71	655.0	650.0
	-PER CAPITA	20.4	21.3	20.4	19.7	-3.43	19.1	-3.04	19.1	19.0
SWEDEN	-TOTAL2	141.0	132.0	138.0	135.0	-2.17	138.0	2.22	138.0	138.0
	-PER CAPITA	16.9	15.8	16.5	16.1	-2.42	16.5	2.48	16.5	16.2
SWITZERLAND	-TOTAL2,4	168.8	173.0	183.0	177.6	-2.95	175.0	-1.46	173.0	.
	-PER CAPITA	25.7	26.3	27.6	26.7	-3.26	.	.	.	.
TUNISIA	-TOTAL	53.0	59.0	57.7	56.5	-2.07	54.1	-4.24	52.5	.
	-PER CAPITA	7.6	8.4	8.1	7.7	-4.93	7.2	-6.49	6.8	.
UNITED STATES	-TOTAL2	11,424.0	11,523.0	11,736.0	11,959.9	1.90	11,523.1	-3.65	11,119.8	.
	-PER CAPITA	49.1	49.0	48.5	50.0	3.09	47.6	-4.80	45.6	.
URUGUAY	-TOTAL2	215.0	177.0	196.0	178.0	-9.18	176.0	-1.12	177.0	.
	-PER CAPITA	72.0	59.0	67.0	60.0	-10.44	59.0	-1.66	59.0	.
YUGOSLAVIA	-TOTAL4	325.0	333.0	315.0	316.0	0.31	317.0	0.31	317.0	.
	-PER CAPITA	14.8	15.0	14.1	.	.	.	.	.	.

1 EEC(12) since 1 January 1986
2 Estimate: for Hungary 1986; for South Africa and EEC 1986 and 1987; all others only 1987
3 From 1986 on, include buffalo meat
4 Secretariat estimates: Brazil 1987; Switzerland and Yugoslavia 1988; Bulgaria all years; others 1987-88
5 1987-88: Source: USDA, World Livestock and Poultry Situation, September 1987

TABLE 6 - IMPORTS OF LIVE CATTLE AND CALVES ('000 HEAD) 3

(CARCASS WEIGHT EQUIVALENT, WHERE AVAILABLE, APPEARES IN BRACKETS IN '000 METRIC TONS)

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1985
ARGENTINA	99.0	3.0	-	-	.	.	.	.	.
	(15.0)	(0.0)	-	-	.	.	.	.	.
BRAZIL	21.0	35.0	17.0	.	.	.	.	.	.
	(3.5)	(5.9)	(6.6)	(8.4)	(27.27)	.	.	.	.
BULGARIA	-	-	5.0	5.2	4.00	.	.	.	.
	-	-	.	.	.	.	.	.	.
CANADA	84.0	37.0	56.0	59.0	5.35	90.0	52.54	107.0	90.0
	(22.2)	(9.8)	(15.3)	(16.1)	(5.22)	(25.3)	(57.14)	(30.0)	(25.0)
COLOMBIA 2,4	.	.	.	3.3	.	6.6	100.00	.	.
	.	.	.	.	.	.	.	.	.
EEC 1,2	505.0	463.0	455.0	480.0	5.49	475.0	-1.04	500.0	.
	(64.0)	(60.0)	(66.0)	(63.0)	(-4.54)	(65.0)	(3.17)	(65.0)	.
EGYPT	123.1	.	.	.	.	.	.	.	.
	.	.	.	.	.	.	.	.	.
HUNGARY	16.3	68.1	40.0	31.8	-20.50	.	.	.	.
	(2.4)	(10.0)	(5.4)	(4.9)	(-9.25)	.	.	.	.
JAPAN	5.6	5.8	13.9	35.1	152.51	.	.	.	.
	(2.0)	(2.0)	(5.0)	(15.0)	(200.00)	.	.	.	.

TABLE 6 - IMPORTS OF LIVE CATTLE AND CALVES ('000 HEAD) 3

(CARCASS WEIGHT EQUIVALENT, WHERE AVAILABLE, APPEARES IN BRACKETS IN '000 METRIC TONS)

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
SOUTH AFRICA 2	126.0	113.0	144.0	147.0	2.08	150.0	2.04	152.0	153.0
	(26.2)	(23.2)	(29.0)	(29.3)	(1.03)	(30.9)	(5.46)	(31.4)	(32.0)
SWITZERLAND	4.5	5.2	4.5	4.0	-11.11	.	.	.	.
	(0.8)	(0.9)	(0.8)	(0.8)	(0.00)	.	.	.	.
TUNISIA	52.1	60.0	27.6	16.0	-42.02	14.0	-12.50	.	.
	(12.9)	(12.7)	(6.4)	(4.2)	(-34.37)	(3.4)	(-19.04)	.	.
UNITED STATES 2	921.0	753.0	836.0	1,406.0	68.18	1,350.0	-3.98	1,100.0	.
	.	.	.	.	.	.	.	.	.
YUGOSLAVIA	.	.	.	.	.	.	.	.	.
	(0.3)	(0.3)	(0.4)	(2.3)	(475.00)	.	.	.	.

1 EEC(12) since 1 January 1986
2 Estimate: for EEC since 1986, all others only 1987
3 Excluding breeding cattle
4 Including buffaloes also

TABLE 7 - IMPORTS OF FRESH, CHILLED AND/OR FROZEN BEEF AND VEAL

('000 METRIC TONS, CARCASS WEIGHT EQUIVALENT)

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
ARGENTINA	5.0	-	-	-	.	.	.	.	.
AUSTRALIA	3.4	3.9	4.8	3.1	-35.41	.	.	.	.
AUSTRIA	5.0	5.0	2.0	2.0	0.00	.	.	.	.
BRAZIL	25.4	36.9	48.5	474.0	77.31	.	.	92.0	92.0
BULGARIA	0.1	0.1	1.4	10.0	14.28	.	.	.	.
CANADA	79.6	106.4	103.8	103.3	-0.48	.	.	.	.
EEC 1,2	240.0	229.0	250.0	246.0	-1.60	255.0	3.65	265.0	.
EGYPT	77.6	.	.	.	.	.	.	.	.
FINLAND	1.0	-	-	-	.	.	.	.	.
HUNGARY	11.2	7.2	3.2	16.7	21.87	.	.	.	.
JAPAN	196.0	207.0	215.0	254.0	18.13	.	.	.	.
NEW ZEALAND 4	-	-	0.2	.	.	.	.	.	.
NORWAY	1.4	1.8	1.9	.8	0.00	.	.	.	.

TABLE 7 - IMPORTS OF FRESH, CHILLED AND/OR FROZEN BEEF AND VEAL

('000 METRIC TONS, CARCASS WEIGHT EQUIVALENT)

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
POLAND 2,3	1.5	14.2	4.1	1.2	-70.73	.	.	.	.
SOUTH AFRICA 2	23.0	25.1	21.6	23.9	10.64	31.5	31.79	31.5	31.6
SWEDEN 2	7.2	5.1	6.8	7.5	10.29	12.0	60.00	12.0	11.0
SWITZERLAND	11.5	10.6	7.0	7.6	8.57	.	.	.	.
TUNISIA	11.5	15.2	10.8	10.3	-4.62	9.6	-6.79	.	.
UNITED STATES 2	780.0	743.0	854.0	897.0	5.03	878.0	-2.11	.	.
YUGOSLAVIA	42.3	23.7	18.1	30.3	67.40	.	.	.	.

1 EEC(12) since 1 January 1986
2 Estimate: for EEC since 1986, all others only 1987
3 Frozen only
4 Product weight

TABLE 8 - IMPORTS OF BEEF AND VEAL OTHER THAN FRESH, CHILLED AND/OR FROZEN

(CANNED, COOKED, ETC.)
('000 METRIC TONS, CARCASS WEIGHT EQUIVALENT)

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
AUSTRALIA	0.6	0.6	0.8	0.6	-25.00	.	.	.	.
BULGARIA	0.1	0.1	.	.	.	.	.	.	.
CANADA	12.3	10.2	12.1	8.2	-32.23	.	.	.	.
EEC 1,2	144.0	148.0	150.0	156.0	4.00	155.0	-0.64	155.0	.
HUNGARY	1.0	0.1	0.1	.	.	.	.	.	.
JAPAN	15.0	15.0	14.0	18.0	28.57	.	.	.	.
NORWAY	0.2	0.2	0.3	0.3	0.00	.	.	.	.
POLAND 2	0.5	0.2	0.2	0.2	0.00	0.2	0.00	.	.
SWEDEN 2	0.4	0.3	0.6	0.6	0.00	1.0	66.66	1.0	1.0
SWITZERLAND	2.9	3.1	3.1	3.2	3.22	.	.	.	.
UNITED STATES 2	96.0	83.0	85.0	67.0	-21.17	97.0	44.77	.	.
URUGUAY	.	2.0	2.0	.	.	.	.	.	.

1 EEC(12) since 1 January 1986
2 Estimate: for EEC since 1986, all others only 1987

TABLE 9 - EXPORTS OF LIVE CATTLE AND CALVES ('000 HEAD) 3

(CARCASS WEIGHT EQUIVALENT, WHERE AVAILABLE, APPEARS IN BRACKETS IN '000 METRIC TONS)

UNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
STRALIA	47.2 (9.4)	35.1 (7.3)	49.2 (9.3)	73.1 (13.8)	48.57 (48.38)	70.0 (13.4)	-4.24 (-2.89)	75.0 (14.6)	80.0 (15.6)
STRIA	17.0 (11.0)	19.0 (12.0)	9.0 (5.0)	19.0 (12.0)	111.11 (140.00)	..	..	..	..
LGARIA	27.8 (11.9)	24.5 (10.8)	8.3 .	13.7 .	65.06 .	..	..	..	..
NADA	212.0 (50.4)	250.0 (66.0)	235.0 (63.0)	178.0 (48.9)	-24.25 (-22.38)	180.0 (49.8)	1.12 (1.84)	160.0 (44.3)	155.0 (43.0)
LOMBIA 4	.	0.7	2.1	0.1	-95.23	.	.	.	.
C 1,2	398.0 (103.0)	367.0 (96.0)	275.0 (72.0)	187.0 (50.0)	-32.00 (-30.55)	190.0 (50.0)	1.60 (0.00)	150.0 (40.0)	..
NGARY	205.0 (57.9)	207.8 (60.7)	215.7 (56.2)	182.7 (65.7)	-15.29 (16.90)	..	..	..	..
PAN	-	-	0.2	-	.	.	.	.	.
LAND 2	304.0 (33.8)	290.0 (39.1)	229.0 (34.8)	299.0 (35.8)	30.56 (2.87)	372.0 (42.4)	24.41 (18.43)	450.0 (50.0)	..

TABLE 9 - EXPORTS OF LIVE CATTLE AND CALVES ('000 HEAD) 3

(CARCASS WEIGHT EQUIVALENT, WHERE AVAILABLE, APPEARS IN BRACKETS IN '000 METRIC TONS)

OUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	1989
OMANIA	.	15.7	.	.	. .	.	.	.	.
NITED STATES 2	16.5	35.0	38.0	41.0	7.89	41.0	0.00	41.0	.
RUGUAY	35.0	.	.	.	.	.	.	.	.
	(7.0)	.	.	.	.	.	.	.	.
UGOSLAVIA	.	.	.	.	.	.	.	.	.
	(29.8)	(39.3)	(41.7)	(42.9)	(2.87)	.	.	.	.

1 EEC(12) since 1 January 1986
2 Estimate: for EEC since 1986, all others only 1987
3 Excluding breeding cattle
4 Including buffaloes also

TABLE 10 - EXPORTS OF FRESH, CHILLED AND/OR FROZEN BEEF AND VEAL

('000 METRIC TONS CARCASS WEIGHT EQUIVALENT)

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
ARGENTINA	262.0	125.0	119.0	111.6	-6.21	95.0	-14.87	.	.
AUSTRALIA	726.0	575.0	653.0	795.0	21.74	818.0	2.89	836.0	839.0
AUSTRIA	28.0	43.0	56.0	62.0	10.71	50.0	-19.35	.	.
BRAZIL 2	159.9	153.3	140.0	107.0	-23.57	50.0	-53.27	150.0	190.0
ULGARIA	12.5	12.5	9.4	15.8	68.08	.	.	.	.
CANADA	79.0	101.9	113.9	101.7	-10.71	.	.	.	.
COLOMBIA 4	12.6	5.2	4.1	10.7	160.97	8.1	-24.29	10.0	.
EC 1,2	462.0	650.0	692.0	1,074.0	55.20	860.0	-19.92	680.0	.
FINLAND	14.0	13.9	11.6	9.5	-18.10	.	.	.	.
UATEMALA	7.7	.	13.4	3.9	-70.89	.	.	.	.
UNGARY	43.9	50.1	55.8	36.5	-34.58	.	.	.	.
EW ZEALAND 4	233.0	179.0	356.9	358.0	0.30	.	.	.	.
ORWAY	7.3	2.2	0.6	0.2	-66.66	.	.	.	.

TABLE 10 - EXPORTS OF FRESH, CHILLED AND/OR FROZEN BEEF AND VEAL

('000 METRIC TONS CARCASS WEIGHT EQUIVALENT)

OUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
OLAND 2,3	6.6	5.8	9.5	46.3	387.36	53.0	14.47	27.9	.
OMANIA	.	38.6	.	.	.	.	.	.	.
OUTH AFRICA 2	1.3	1.9	2.1	2.1	0.00	2.2	4.76	2.3	2.4
WEDEN 2	22.9	22.6	32.7	22.0	-32.72	5.5	-75.00	5.0	5.0
WITZERLAND	0.7	.	1.6	3.0	87.50	.	.	.	.
NITED STATES 2	109.0	135.0	138.0	216.0	56.52	275.0	27.31	184.0	.
RUGUAY 2	222.0	131.0	120.0	161.0	34.16	93.0	-42.23	112.0	.
UGOSLAVIA	36.8	37.0	50.0	27.2	-45.60	.	.	.	.

1 EEC(12) since 1 January 1986
2 Estimate: for EEC since 1986, all others only 1987
3 Only fresh and chilled
4 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	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
ARGENTINA	153.0	125.0	141.0	144.4	2.41	191.9	32.89	.	.
AUSTRALIA	31.0	42.0	37.0	34.0	-8.10	39.0	14.70	38.0	40.0
RAZIL 2	303.6	325.4	297.6	257.0	-13.64	200.0	-22.17	250.0	260.0
ANADA	3.7	3.2	3.2	1.7	-46.87	.	.	.	.
OLOMBIA	.	.	.	0.3	.	0.4	33.33	0.5	.
EC 1,2	38.0	44.0	41.0	43.0	4.87	40.0	-6.97	40.0	.
INLAND	2.8	5.0	11.9	12.8	7.56	.	.	.	.
UATEMALA	0.5	.	.	.	.	.	.	.	.
UNGARY	4.1	6.3	8.0	3.6	-55.00	.	.	.	.
ORWAY	0.5	0.4	0.4	0.2	-50.00	.	.	.	.
OLAND 2	4.9	5.7	5.9	6.4	8.47	6.5	1.56	8.1	.
WEDEN 2	0.7	1.1	2.9	1.9	-34.48	1.0	-47.36	1.0	1.0
ITZERLAND	0.4	0.4	0.7	0.7	0.00	.	.	.	.
NITED STATES 2	16.0	17.0	13.0	13.0	0.00	15.0	15.38	.	.
RUGUAY 2	10.0	13.0	14.0	25.0	78.57	15.0	-40.00	18.0	.
UGOSLAVIA	4.6	5.4	4.7	1.8	-61.70	.	.	.	.

1 EEC(12) since 1 January 1986
2 Estimate: for EEC since 1986, all others only 1987

TABLE 12 - BEEF PRICE - AVERAGE PRICE RECEIVED BY PRODUCERS

OUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986
RGENTINA ($a/100 KG.)3,5	669.00	4,324.00	23.80	53.80	126.05	.	.
USTRALIA ($a/100 KG.)	150.20	166.70	172.00	174.30	1.34	204.00	17.04
USTRIA (S/100 KG.)	2,553.00	2,518.00	2,489.00	.	.	.	.
RAZIL (Cz$/100 KG.)	3,524.00	3,847.00	3,357.00	3,884.00	15.70	.	.
ANADA (Can$/100 KG.)	121.10	126.70	123.00	134.70	9.51	157.00	16.56
OLOMBIA (Col$/100 KG.)	10,296.00	11,083.00	14,188.00	18,147.00	27.90	.	.
C (ECU/100 KG.)1,2,4	161.30	155.50	157.40	304.70	93.58	289.00	-5.15
INLAND (FIM/100 KG.)	2,130.00	2,317.00	2,456.00	2,511.00	2.24	.	.
UNGARY (Ft/100 KG.)	4,400.00	4,570.00	4,570.00	4,570.00	0.00	.	.
APAN (Y/100 KG.)	463.00	440.00	457.00	479.00	4.81	.	.
W ZEALAND ($NZ/100 KG.)	131.30	163.00	163.00	151.00	-7.36	154.00	1.99
RWAY (NOK/100 KG.)	2,616.00	2,763.00	3,169.00	3,353.00	5.81	3,494.00	4.21
LAND (Zl/100 KG.)	10,030.00	11,570.00	13,360.00	15,000.00	12.28	.	.

TABLE 12 - BEEF PRICE - AVERAGE PRICE RECEIVED BY PRODUCERS

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986
SOUTH AFRICA (R/100 KG.)2	215.00	226.50	239.30	289.20	20.85	391.60	35.41
SWEDEN (SEK/100 KG.)	1,974.00	2,027.00	1,885.00	2,054.00	8.97	.	.
SWITZERLAND (Sw F/100 KG.)	565.00	576.00	562.00	544.00	-3.20	.	.
TUNISIA (D/100 KG.)	190.00	210.00	240.00	245.00	2.08	.	.
UNITED STATES (US$/100 KG.)	55.80	57.60	54.00	52.90	-2.04	.	.
URUGUAY (NUr$/100 KG.)	2,278.00	4,913.00	7,499.00	13,392.00	78.58	.	.
YUGOSLAVIA (Din/100 KG.)	16,876.00	23,277.00	38,558.00	70,600.00	83.10	.	.

1 EEC(12) since 1 January 1986
2 Estimate: for EEC since 1986, all others only 1987
3 "Australes" as of the third quarter, 1985
4 From 1986 on, new cow grade
5 New Argentinian peso since 1983

Note: See notes on pages 80-81

TABLE 13 - AVERAGE RETAIL PRICE FOR BEEF

OUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986
RGENTINA ($a/KG.)1,3	18.84	120.05	0.79	1.86	135.44	.	.
USTRALIA ($A/KG.)	7.38	7.65	8.00	8.37	4.62	.	.
USTRIA (S/KG.)	148.10	155.00	156.00	157.00	0.64	.	.
RAZIL (Cz$/KG.)	77.80	75.88	72.88	96.08	31.83	.	.
ANADA (Can$/KG.)	8.72	9.75	10.10	10.05	-0.43	.	.
OLOMBIA (Col$/KG.)	.	.	393.46	475.32	20.81	.	.
GYPT (LE/KG.)	414.90	.	.	.	.	.	.
INLAND (FIM/KG.)	37.10	40.49	43.62	45.71	4.79	.	.
UNGARY (Ft/KG.)	62.00	78.00	78.00	78.00	0.00	.	.
APAN (Y/KG.)	3.51	3.57	3.51	3.53	0.66	.	.
EW ZEALAND ($NZ/KG.)	4.58	5.00	5.73	5.18	-9.60	.	.
ORWAY (NOK/KG.)	65.09	72.83	76.44	.	.	.	.
OLAND (Z1/KG.)	250.00	300.00	340.00	368.00	8.24	404.00	9.78

TABLE 13 - AVERAGE RETAIL PRICE FOR BEEF

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986
SOUTH AFRICA (R/KG.)2	5.46	5.83	6.37	7.75	21.68	12.00	54.84
SWEDEN (SEK/KG.)	67.37	82.67	85.23	88.88	4.28	.	.
SWITZERLAND (Sw F/KG.)	17.66	18.46	18.53	17.86	-3.62	.	.
TUNISIA (D/KG.)	2.20	2.50	3.20	3.20	0.00	.	.
UNITED STATES (US$/KG.)	1.08	1.09	1.06	1.05	-0.85	.	.
URUGUAY (NUr$/KG.)	27.78	55.52	79.29	167.98	111.86	.	.
YUGOSLAVIA (Din/KG.)	243.00	322.00	543.00	1,003.00	84.71	.	.

1 New Argentinian peso since 1983
2 1987: estimates
3 "Australes" as of the third quarter, 1985

Note: See notes on pages 80-81

TABLE 14 - BEEF PRICES - AVERAGE OR REPRESENTATIVE EXPORT PRICES (F.O.B.)

(US$/TON) - AVERAGE OR REPRESENTATIVE IMPORT PRICES (C.I.F.)

OUNTRY		1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986
RGENTINA	- EXPORT(F.O.B.)	1,312	1,273	864	975	12.85	.	.
	- IMPORT(C.I.F.)	.	.	.	.	.	.	.
USTRALIA	- EXPORT(F.O.B.)	1,882	2,222	1,862	1,932	3.76	.	.
	- IMPORT(C.I.F.)	2,647	2,606	2,121	2,080	-1.93	.	.
USTRIA	- EXPORT(F.O.B.) 2	4,307	3,758	3,431	2,863	-16.55	.	.
	- IMPORT(C.I.F.)	5,196	9,557	7,617	10,259	34.69	.	.
RAZIL	- EXPORT(F.O.B.)	1,730	1,850	1,880	1,950	3.72	.	.
	- IMPORT(C.I.F.)	800	790	770	1,090	56	.	.
ANADA	- EXPORT(F.O.B.)	1,881	1,882	1,753	1,831	.45	.	.
	- IMPORT(C.I.F.)	2,303	2,291	1,992	2,010	.90	.	.
OLOMBIA	- EXPORT(F.O.B.)	2,987	2,390	2,845	1,693	-40.49	.	.
	- IMPORT(C.I.F.)	.	.	.	.	.	.	.
EC	- EXPORT(F.O.B.) 1	1,370	1,116	990	.	.	.	.
	- IMPORT(C.I.F.)	.	.	.	.	.	.	.
INLAND	- EXPORT(F.O.B.)	.	1,120	970	940	-3.09	.	.
	- IMPORT(C.I.F.)	.	.	4,810	6,000	24.74	.	.
UNGARY	- EXPORT(F.O.B.)	1,590	1,071	799	868	8.64	.	.
	- IMPORT(C.I.F.)	1,054	738	735	.	.	.	.
APAN	- EXPORT(F.O.B.)	.	.	.	.	.	.	.
	- IMPORT(C.I.F.)	3,250	3,15[illegible]	3,140	3,110	-0.96	.	.
EW ZEALAND	- EXPORT(F.O.B.)	2,177	2,119	2,066	1,855	-10.21	.	.
	- IMPORT(C.I.F.)	.	.	.	.	.	.	.

TABLE 14 - BEEF PRICES - AVERAGE OR REPRESENTATIVE EXPORT PRICES (F.O.B.)

(US$/TON) - AVERAGE OR REPRESENTATIVE IMPORT PRICES (C.I.F.)

COUNTRY		1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986
NORWAY	- EXPORT(F.O.B.)	3,610	3,720	6,050	.	.	.	.
	- IMPORT(C.I.F.)	2,640	2,870	2,980	.	.	.	.
POLAND	- EXPORT(F.O.B.)	1,554	1,339	976	1,198	22.75	.	.
	- IMPORT(C.I.F.)	927	840	857	849	-0.93	.	.
SWEDEN	- EXPORT(F.O.B.)	1,960	1,610	1,410	1,270	-9.93	.	.
	- IMPORT(C.I.F.)	3,940	3,650	3,910	4,160	6.39	.	.
SWITZERLAND	- EXPORT(F.O.B.)	.	.	1,250	600	-52.00	.	.
	- IMPORT(C.I.F.)	6,160	5,800	7,380	6,810	-7.72	.	.
TUNISIA	- EXPORT(F.O.B.)	.	.	.	.	.	.	.
	- IMPORT(C.I.F.)	1,570	1,650	1,720	1,830	6.40	.	.
UNITED STATES	- EXPORT(F.O.B.)	.	.	.	.	.	.	.
	- IMPORT(C.I.F.)	1,500	1,500	1,500	1,500	0.00	.	.
URUGUAY	- EXPORT(F.O.B.)	1,211	1,070	979	999	2.04	.	.
	- IMPORT(C.I.F.)	.	.	.	.	.	.	.

1 EEC(12) since 1 January 1986
2 Exchange rate - source: International Financial Statistics - IMF, Vol. XXXIX, Number 12, December 1986

Note: See notes on pages 80-81

NOTES ON TABLES 12, 13 AND 14

	AVERAGE PRICE RECEIVED BY PRODUCERS	AVERAGE RETAIL PRICE FOR BEEF	AVERAGE OR REPRESENTATIVE EXPORT PRICES	AVERAGE OR REPRESENTATIVE IMPORT PRICES
ARGENTINA	Steer, live weight, Liniers	Sirloin steak, Buenos Aires	Frozen boneless cow grade beef	-
AUSTRALIA	Weighted average price; capital city saleyards (carcass weight)	Beef, rump; weighted average of eight capital cities	Average of total beef and veal including canned	Bovine meat
AUSTRIA	Average domestic price of 100 kg. of slaughter cattle	National average retail price of strip loin	Ratio between value and quantity of total exports of beef and veal, fresh and chilled (free-at-frontier)	Ratio between value and quantity of total imports of beef and veal, fresh and chilled (free-at-frontier)
BRAZIL	Average real price of bovine carcass, State of Sao Paulo	Average real price of rump, Sao Paulo	Frozen boneless beef	Frozen boneless beef
CANADA	Slaughter cattle	Sirloin steak,	Frozen boneless beef	Frozen boneless beef
COLOMBIA	...	...	Carcass weight equivalent	...
EUROPEAN ECONOMIC COMMUNITY	Market price (wholesale) 100 kg. live weight until 1985, adult male cattle, quality R3 afterwards	...	Free-at-Community-frontier offer price	...
EGYPT	...	Boneless beef	...	...
FINLAND	...	Average of different cuts	Average, frozen beef (including bones)	Average, frozen beef (including bones)
HUNGARY	Bull, class I	Sirloin, bone-in	Frozen or fresh beef, carcass bone-in	Frozen or fresh beef, carcass bone-in
JAPAN	Dairy cow, live weight, fiscal year	Tokyo, middle grade, product weight basis	-	Product weight basis
NEW ZEALAND	Annual average prices are for the year ending 30/9 and are weighted averages	Prime rib	...	-

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 roast beef	Hind quarters, frozen or chilled until 1986, "pistola" cut afterwards	Compensated beef carcass, frozen
SOUTH AFRICA	Average for all grades and all markets	Beef sirloin Super A	...	...
SWEDEN	Slaughtered weight, average prices for cattle, all grades, on the Swedish market	Representative basket of beef products in the retail trade	Frozen boneless beef	Frozen boneless beef
SWITZERLAND	Heifers and steers IA, free market	Beef for boiling and stewing	...	Frozen boneless beef
TUNISIA	...	Sirloin	...	Frozen boneless beef
UNITED STATES	Slaughter steers, Omaha Choice	Estimated weighted average price of retail cuts from Choice Yield, grade 3, carcass	Frozen boneless beef	Imported cow meat, 85 per visible lean, f.o.b. port of entry
URUGUAY	Dressed carcass weight. Weighted average of all classes of cattle	Weighted average price per steer/cow	Boneless quarters and cuts, carcass weight	-

TABLE 15 - PIGMEAT PRODUCTION ('000 METRIC TONS, CARCASS WEIGHT EQUIVALENT)

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
ARGENTINA	207.0	210.0	190.0	200.0	5.26	210.0	5.00	.	.
AUSTRALIA 3	247.0	257.0	266.9	270.7	1.42	285.4	5.43	288.0	304.0
AUSTRIA 5	437.5	434.8	455.6	445.6	-2.19	441.1	-1.00	449.0	.
BRAZIL 3	559.3	477.4	970.0	1,020.0	5.15	1,200.0	17.64	1,150.0	1,200.0
BULGARIA 5	246.6	251.7	237.0	265.0	11.81	268.4	1.28	268.4	.
CANADA	852.0	862.5	900.3	907.8	0.83	935.0	2.99	1,009.8	1,010.0
COLOMBIA 3	84.6	86.5	86.9	93.2	7.24	95.5	2.46	97.8	100.2
EEC 1	10,368.0	10,432.0	10,549.0	12,241.0	16.03	12,500.0	2.11	12,500.0	.
FINLAND 3	177.2	170.5	172.4	174.1	0.98	174.0	-0.05	177.0	.
HUNGARY	653.8	691.4	.	323.9	.	.	.	.	.
JAPAN 5	1,429.0	1,424.0	1,531.0	1,550.0	1.24	1,573.3	1.50	1,613.3	.
NEW ZEALAND 3	40.1	43.8	48.9	46.0	-5.93	46.0	0.00	46.0	46.0
NORWAY 3	81.3	84.2	83.8	85.7	2.26	89.6	4.55	87.0	87.0

TABLE 15 - PIGMEAT PRODUCTION ('000 METRIC TONS, CARCASS WEIGHT EQUIVALENT)

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
POLAND 5	1,133.0	1,057.0	1,204.0	1,403.0	16.52	1,333.0	-4.98	1,266.0	.
ROMANIA 4	821.0	715.0	875.0	840.0	-4.00	870.0	3.57	890.0	.
SOUTH AFRICA 2,3	117.8	114.0	113.8	111.3	-2.19	110.6	-0.62	115.0	120.0
SWEDEN 3	318.0	323.0	332.0	309.0	-6.92	288.0	-6.79	280.0	290.0
SWITZERLAND 3,5	282.9	268.6	275.9	277.0	0.39	277.0	0.00	273.0	.
UNITED STATES 3	6,894.0	6,719.0	6,716.0	6,372.0	-5.12	6,421.0	0.76	7,128.0	.
URUGUAY 3	22.0	18.0	18.0	17.0	-5.55	16.0	-5.88	16.0	.
YUGOSLAVIA 5	772.0	876.0	833.0	795.0	-4.56	827.0	4.02	870.0	.

1 EEC(12) since 1 January 1986
2 1986: preliminary
3 1987: estimate
4 Source: USDA, World Livestock and Poultry Situation, September 1987
5 Secretariat estimates: for Switzerland 1988, others 1987-88

TABLE 16 - PIGMEAT CONSUMPTION ('000 METRIC TONS, CARCASS WEIGHT AND KG./CAPITA)

COUNTRY		1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
ARGENTINA	- TOTAL 5	207.0	210.0	190.0	200.0	5.26	210.0	5.00	.	.
	- PER CAPITA	7.0	7.0	6.3	6.5	3.17	6.7	3.07	.	.
AUSTRALIA	- TOTAL 3	245.1	253.9	261.1	268.5	2.83	280.5	4.46	289.0	304.0
	- PER CAPITA	15.9	16.3	16.6	16.8	1.20	17.4	3.57	17.7	18.4
AUSTRIA	- TOTAL 5	359.5	357.5	371.0	367.3	-0.99	367.3	0.00	369.2	.
	- PER CAPITA	47.6	47.3	49.1	.	.	.	.	.	.
BRAZIL	- TOTAL 3,4	557.0	471.2	965.0	1,051.0	8.91	1,200.0	14.17	1,144.0	1,192.0
	- PER CAPITA	.	.	7.1	7.6	7.04	8.7	14.47	7.9	8.0
CANADA	- TOTAL	712.9	701.4	723.2	707.6	-2.15	714.7	1.00	750.4	788.0
	- PER CAPITA	28.6	27.9	28.5	27.6	-3.15	27.6	0.00	28.7	29.9
COLOMBIA	- TOTAL 3	84.6	86.5	86.9	93.2	7.24	95.5	2.46	97.8	.
	- PER CAPITA	3.1	3.2	3.0	3.2	6.66	3.3	3.12	3.3	.
EEC	- TOTAL 1	10,151.0	10,200.0	10,241.0	11,969.0	16.87	12,176.0	1.72	12,226.0	.
	- PER CAPITA	37.3	37.4	37.5	37.1	-1.06	37.7	1.61	37.8	.
FINLAND	- TOTAL 3	149.9	151.2	156.2	161.3	3.26	162.0	0.43	164.0	.
	- PER CAPITA	30.9	31.0	31.8	32.8	3.14	32.9	0.30	33.2	.
HUNGARY	- TOTAL	461.3	457.1	.	213.1	.	.	.	.	.
	- PER CAPITA	43.2	42.8	42.8	42.2	-1.40	.	.	.	.
JAPAN	- TOTAL 5	1,665.0	1,702.0	1,801.0	1,847.0	2.55	1,902.0	2.97	1,946.0	.
	- PER CAPITA	14.0	14.2	15.0	15.2	1.33	.	.	.	.
NEW ZEALAND	- TOTAL 3	40.7	44.5	48.5	48.0	-1.03	49.0	2.08	50.0	50.0
	- PER CAPITA	12.6	13.7	14.8	14.6	-1.35	14.8	1.36	15.1	15.1

TABLE 16 - PIGMEAT CONSUMPTION ('000 METRIC TONS, CARCASS WEIGHT AND KG./CAPITA)

COUNTRY		1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
NORWAY	- TOTAL	79.5	79.6	83.9	85.9	2.38	85.9	0.00	86.1	86.3
	- PER CAPITA	19.3	19.2	20.2	20.6	1.98	20.6	0.00	20.5	20.5
POLAND	- TOTAL 5	1,125.0	1,037.0	1,116.0	1,284.0	15.05	1,247.0	-2.88	1,216.0	.
	- PER CAPITA	30.7	28.1	30.0	34.2	14.00	.	.	.	.
SOUTH AFRICA	- TOTAL 2,3	114.0	110.0	111.0	105.0	-5.40	108.0	2.85	112.0	116.0
	- PER CAPITA	3.6	3.4	3.3	3.0	-9.09	3.3	10.00	3.4	3.4
SWEDEN	- TOTAL 3	272.0	259.0	262.0	263.0	0.38	266.0	1.14	268.0	270.0
	- PER CAPITA	32.7	30.9	31.5	31.6	0.31	31.8	0.63	31.9	32.1
SWITZERLAND	- TOTAL 3	295.1	280.4	288.3	287.7	-0.20	290.0	0.79	290.0	.
	- PER CAPITA	45.0	42.6	43.5	43.2	-0.68	.	.	.	.
UNITED STATES	- TOTAL 3	6,971.0	6,984.0	7,099.0	6,746.0	-4.97	6,896.0	2.22	7,550.0	.
	- PER CAPITA	30.0	29.8	29.9	28.2	-5.68	28.2	0.00	28.0	.
URUGUAY	- TOTAL 3	22.0	19.0	18.0	17.0	-5.55	16.0	-5.88	16.0	.
	- PER CAPITA	7.5	6.5	6.2	5.2	-16.12	5.2	0.00	5.2	.
YUGOSLAVIA	- TOTAL 5	693.0	735.0	734.0	728.0	-0.81	700.0	-3.84	728.0	.
	- PER CAPITA	31.6	33.1	32.8	.	.	.	.	.	.

1 EEC(12) since 1 January 1986
2 1986: preliminary
3 1987: estimate
4 Total apparent consumption
5 Secretariat estimates: for Austria and Yugoslavia 1986-88, others 1987-88

TABLE 17 - PIGMEAT IMPORTS ('000 METRIC TONS, CARCASS WEIGHT EQUIVALENT)

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
AUSTRALIA 2	-	0.8	0.7	0.6	-14.28	0.7	16.66	.	.
AUSTRIA 3	1.3	1.2	0.5	0.3	-40.00	4.0	233.33	0.4	.
BRAZIL 4	-	-	0.6	38.0	233.33	70.0	84.21	2.0	2.0
BULGARIA	-	-	3.6	0.5	-86.11	.	.	.	.
CANADA	19.5	15.0	17.3	14.0	-19.07	20.0	42.85	18.0	.
COLOMBIA	-	0.3	-	-	.	.	.	.	.
EEC 1,4	67.0	119.[illegible]	125.0	105.0	-16.00	70.0	-33.33	100.0	.
HUNGARY	-	-	0.5	8.5	600.00	.	.	.	.
JAPAN 3	236.0	278.0	270.0	295.0	9.25	310.0	5.08	340.0	.
NEW ZEALAND	1.3	0.8	.	.	.	.	.	.	.
NORWAY	2.4	2.4	4.2	2.0	-52.38	0.6	-70.00	1.0	1.0
POLAND 2,4	27.1	105.0	37.9	16.3	-56.99	23.8	46.01	30.0	.
SOUTH AFRICA 2	-	1.0	-	0.6	.	1.0	66.66	1.0	1.0
SWEDEN 2	9.1	5.9	7.8	9.1	16.66	13.0	42.85	13.0	11.0
SWITZERLAND 2,4	4.7	5.7	4.9	5.4	10.20	5.0	-7.40	4.0	.
UNITED STATES 2	318.0	433.0	512.0	490.0	-4.29	533.0	8.77	510.0	.
YUGOSLAVIA 3	.	3.1	6.1	26.7	337.70	15.0	-43.82	0.3	.

1 EEC(12) since 1 January 1986 2 1987: estimate 3 Source (1987-88): USDA, World Livestock and Poultry Situation, September 1987
4 Secretariat estimates: Brazil 1987-88, others 1988

TABLE 18 - PIGMEAT EXPORTS ('000 METRIC TONS, CARCASS WEIGHT EQUIVALENT)

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	1989
ARGENTINA	-	-	-	0.3	.	.	.	.	.
AUSTRALIA 2	2.6	3.2	3.4	3.1	-8.82	4.0	29.03	.	.
AUSTRIA 3	0.7	1.4	7.8	1.4	-82.05	0.3	-78.57	1.0	.
BRAZIL 4	3.8	6.3	5.2	7.3	40.38	6.0	-17.80	8.0	10.0
BULGARIA	-	-	2.0	3.6	80.00	.	.	.	.
CANADA	157.4	175.3	196.5	215.0	9.41	240.0	11.62	270.0	.
EEC 1,4	279.0	371.0	382.0	377.0	-1.30	394.0	4.50	350.0	.
FINLAND 4	25.3	19.9	18.3	10.2	-44.26	13.0	27.45	13.0	.
HUNGARY 3	161.5	206.4	142.9	131.1	-8.25	145.0	10.60	160.0	.
NEW ZEALAND	0.2	.	.	.	.	.	.	.	.
NORWAY	3.1	6.0	6.3	0.6	-90.47	4.5	650.00	1.9	1.7
POLAND 2,4	79.1	88.0	99.0	106.0	7.07	111.5	5.18	121.5	.
ROMANIA 3	85.0	75.0	125.0	135.0	8.00	140.0	3.70	150.0	.
SOUTH AFRICA 2	2.2	1.0	2.0	1.9	-5.00	1.7	-10.52	1.6	1.6
SWEDEN 2	52.7	76.2	76.4	52.7	-31.02	37.0	-29.79	21.0	29.0
SWITZERLAND 2,4	2.0	1.4	1.2	1.0	-16.66	1.0	0.00	.	.
UNITED STATES 2	99.0	94.0	58.0	54.0	-6.89	45.0	-16.66	54.0	.
YUGOSLAVIA	.	4.9	2.8	1.2	-57.14	.	.	.	.

1 EEC(12) since 1 January 1986 2 1987: estimate 3 Source: USDA, World Livestock and Poultry Situation, September 1987: Romania all years, Austria 1987-88
4 Secretariat estimates: EEC 1988, others 1987

TABLE 19 - POULTRY MEAT PRODUCTION ('000 METRIC TONS, READY-TO-COOK BASIS)

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
ARGENTINA 5	286.0	299.0	315.0	350.0	11.11	360.0	2.85	396.0	.
AUSTRALIA 3	301.6	315.0	364.4	368.6	1.15	394.0	6.89	419.0	432.0
AUSTRIA 5	75.7	81.7	78.9	81.1	2.78	85.5	5.42	86.6	.
BRAZIL 3,4	1,075.8	1,049.7	1,550.0	1,700.0	9.67	1,900.0	11.76	2,000.0	2,180.0
BULGARIA 6	109.7	113.1	117.8	120.4	2.20	.	.	.	.
CANADA	527.0	558.5	606.3	628.5	3.66	678.4	7.93	706.3	741.8
COLOMBIA 3	126.1	129.3	137.3	144.8	5.46	150.5	3.93	160.3	170.7
EEC 1	4,312.0	4,331.0	4,386.0	5,445.0	24.14	5,690.0	4.49	5,810.0	.
FINLAND 3	18.3	19.7	20.5	22.1	7.80	23.0	4.07	24.0	.
HUNGARY	388.9	390.9	.	328.2	.	.	.	.	.
JAPAN 5	1,239.0	1,309.0	1,362.0	1,387.0	1.83	1,420.0	2.37	1,440.0	.
NEW ZEALAND 3	32.5	44.4	47.7	46.0	-3.56	47.0	2.17	48.0	49.0
NORWAY 3	11.0	10.9	12.1	13.2	9.09	14.5	9.84	14.3	14.4
POLAND 5	185.0	249.0	269.0	307.0	14.12	350.0	14.00	400.0	.
SOUTH AFRICA 2,3	468.4	483.6	492.5	484.5	-1.62	490.0	1.13	505.0	515.0

TABLE 19 - POULTRY MEAT PRODUCTION ('000 METRIC TONS, READY-TO-COOK BASIS)

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
SWEDEN 3	47.0	45.9	45.8	46.0	0.43	42.5	-7.60	44.0	44.0
SWITZERLAND 3,5	24.6	25.6	25.6	27.5	7.42	28.0	1.81	29.0	.
TUNISIA	37.5	43.0	42.0	45.5	8.33	49.5	8.79	53.5	.
UNITED STATES 3	7,151.0	7,247.0	7,865.0	8,335.0	5.97	9,069.0	8.80	9,529.0	.
URUGUAY 3	15.0	16.0	16.0	20.0	25.00	22.0	10.00	22.0	.
YUGOSLAVIA 5	287.0	313.0	297.0	328.0	10.43	329.0	0.30	334.0	.

1 EEC(12) since 1 January 1986
2 1986: preliminary
3 1987: estimate
4 Federally inspected production - about 70 per cent of total production
5 Secretariat estimates: Argentina and Switzerland 1988, others 1987-88
6 From 1985 on, only industrial poultry meat production

TABLE 20 - POULTRY MEAT CONSUMPTION ('000 METRIC TONS, READY-TO-COOK BASIS AND KG./CAPITA)

COUNTRY		1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
ARGENTINA	- TOTAL 5	290.0	299.0	315.0	355.0	12.69	400.0	12.67	410.2	.
	- PER CAPITA	9.9	10.0	10.4	11.5	10.57	12.7	10.43	.	.
AUSTRALIA	- TOTAL 3	300.3	313.9	363.1	366.1	0.82	391.3	6.88	406.0	418.0
	- PER CAPITA	19.5	20.2	23.0	22.9	-0.43	24.0	4.80	24.9	25.3
AUSTRIA	- TOTAL 5	90.0	89.5	90.5	96.0	6.07	102.6	6.87	104.8	.
	- PER CAPITA	11.9	11.9	11.8	.	.	.	.	.	.
BRAZIL	- TOTAL 3,4	786.5	768.5	1,271.0	1,464.0	15.18	1,690.0	15.43	1,750.0	1,910.0
	- PER CAPITA	.	.	9.4	10.6	12.76	11.6	9.43	12.1	12.8
CANADA	- TOTAL	570.6	596.0	627.7	656.5	4.58	710.9	8.28	744.1	785.9
	- PER CAPITA	22.9	23.7	24.7	25.7	4.04	27.8	8.17	29.1	30.7
COLOMBIA	- TOTAL 3	126.1	129.3	137.3	144.8	5.46	150.5	3.93	160.3	.
	- PER CAPITA	4.6	4.7	4.9	5.1	4.08	5.2	1.96	5.5	.
EEC	- TOTAL 1	3,992.0	4,028.0	4,131.0	5,157.0	24.83	5,421.0	5.11	5,550.0	.
	- PER CAPITA	14.7	14.8	15.1	16.0	5.96	16.8	5.00	17.1	.
FINLAND	- TOTAL 3	18.3	19.6	20.5	22.1	7.80	23.0	4.07	24.0	.
	- PER CAPITA	3.8	4.0	4.2	4.5	7.14	4.7	4.44	4.9	.
HUNGARY	- TOTAL	211.6	222.5	.	135.2	.	.	.	.	.
	- PER CAPITA	19.8	20.9	20.8	22.3	7.21	.	.	.	.
JAPAN	- TOTAL 5	1,338.0	1,411.0	1,450.0	1,549.0	6.82	1,642.0	6.00	1,700.0	.
	- PER CAPITA	11.2	11.7	12.0	12.7	5.83	.	.	.	.
NEW ZEALAND	- TOTAL 3	32.5	44.4	48.5	48.0	-1.03	49.0	2.08	30.0	50.0
	- PER CAPITA	10.0	13.6	14.8	14.6	-1.35	14.8	1.36	15.1	15.1

TABLE 20 - POULTRY MEAT CONSUMPTION ('000 METRIC TONS, READY-TO-COOK BASIS AND KG./CAPITA)

COUNTRY		1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
NORWAY	- TOTAL	11.4	12.0	13.0	14.8	13.84	14.5	-2.02	14.7	14.8
	- PER CAPITA	2.8	2.9	3.1	3.5	12.90	3.5	0.00	3.5	3.5
POLAND	- TOTAL 5	192.0	250.0	262.0	285.0	8.77	326.0	14.38	370.0	.
	- PER CAPITA	5.3	6.8	7.1	7.6	7.04	.	.	.	.
SOUTH AFRICA	- TOTAL 2,3	448.0	464.0	489.0	482.0	-1.43	493.0	2.28	500.0	510.0
	- PER CAPITA	14.4	14.5	14.9	14.3	-4.02	15.0	4.89	15.5	16.0
SWEDEN	- TOTAL 3	44.5	44.3	44.6	44.8	0.44	41.0	-8.48	43.0	43.0
	- PER CAPITA	5.4	5.4	5.4	5.2	-3.70	4.9	-5.76	5.1	5.1
SWITZERLAND	- TOTAL 3	53.4	57.2	59.7	63.2	5.86	65.0	2.84	67.0	.
	- PER CAPITA	8.2	8.7	9.0	9.5	5.55	.	.	.	.
TUNISIA	- TOTAL	37.5	43.0	42.0	49.5	17.85	53.0	7.07	58.0	.
	- PER CAPITA	5.5	6.1	6.1	6.7	9.83	7.1	5.97	7.5	.
UNITED STATES	- TOTAL 3	6,866.0	7,131.0	7,538.0	8,063.0	6.96	8,664.0	7.45	9,254.0	.
	- PER CAPITA	29.5	30.3	31.8	33.5	5.34	35.4	5.67	34.3	.
URUGUAY	- TOTAL 3	13.0	12.0	14.0	16.0	14.28	18.0	12.50	18.0	.
	- PER CAPITA	4.6	4.2	4.9	5.2	6.12	5.9	13.46	5.9	.
YUGOSLAVIA	- TOTAL 5	280.0	284.0	272.0	293.6	7.94	312.2	6.33	319.1	.
	- PER CAPITA	12.8	12.8	12.2	.	.	.	.	.	.

1 EEC(12) since 1 January 1986
2 1986: preliminary
3 1987: estimate
4 Total apparent consumption
5 Secretariat estimates: Argentina 1988, Japan and Poland 1987-88, others 1986-88

TABLE 21 - POULTRY MEAT IMPORTS ('000 METRIC TONS, CARCASS WEIGHT EQUIVALENT)

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
ARGENTINA 4	1.5	1.5	0.3	40.0	13,233.33	29.6	-26.00	5.2	.
AUSTRIA 3	10.1	10.1	10.7	13.6	27.10	16.0	17.64	17.0	.
CANADA	36.2	40.6	32.5	37.6	15.69	37.1	-1.32	39.0	.
EEC 1,4	59.0	77.0	87.0	69.0	-20.68	88.0	27.53	77.0	.
EGYPT 3	130.0	120.0	99.0	50.0	-49.49	65.0	30.00	85.0	.
JAPAN 4	101.0	10[illegible]0	101.0	175.0	73.26	201.0	14.85	206.0	.
NORWAY	0.4	0.5	0.6	1.7	183.33	0.3	-82.35	0.4	0.4
POLAND	20.5	15.9	7.5	-	.	.	.	.	.
SOUTH AFRICA 2	1.5	3.0	2.7	10.3	281.48	12.0	16.50	12.0	12.0
SWEDEN 2	0.4	0.4	0.7	1.0	42.85	0.5	-50.00	0.5	0.5
SWITZERLAND 2	29.4	31.8	32.9	36.1	9.72	38.0	5.26	38.0	.
TUNISIA	0.5	-	-	-	.	.	.	.	.
YUGOSLAVIA	.	0.5	1.6	.	.	.	.	.	.

1 EEC(12) since 1 January 1986
2 1987: estimate
3 Source : USDA, World Livestock and Poultry Situation, September 1987: Austria 1987-88, Egypt all years
4 1987-88: secretariat estimates

TABLE 22 - POULTRY MEAT EXPORTS ('000 METRIC TONS, CARCASS WEIGHT EQUIVALENT)

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
ARGENTINA	0.4	-	.	.	.	.	.	.	.
AUSTRALIA 2	1.3	1.1	1.4	2.5	78.57	2.0	-20.00	.	.
AUSTRIA	0.4	0.1	0.1	.	.	.	.	.	.
BRAZIL 4	289.3	281.2	279.0	236.0	-15.41	230.0	-2.54	250.0	270.0
BULGARIA 4	30.0	30.0	30.3	28.5	-5.94	20.0	-29.82	20.0	.
CANADA	1.9	2.2	5.1	4.4	-13.72	3.5	-20.45	4.5	.
EEC 1,4	441.0	372.0	339.0	329.0	-2.94	340.0	3.34	310.0	.
FINLAND	-	0.1	-	-	.	.	.	.	.
HUNGARY 4	185.7	162.5	155.8	155.8	0.00	180.8	16.04	181.0	.
JAPAN	2.0	2.0	3.0	3.0	0.00	.	.	.	.
NEW ZEALAND	0.4	0.2	.	.	.	.	.	.	.
POLAND 2	13.2	14.2	14.0	12.2	-12.85	13.0	6.55	15.0	.
ROMANIA 3	36.0	47.0	48.0	60.0	25.00	70.0	16.66	80.0	.
SOUTH AFRICA 2	16.3	7.7	1.6	2.1	31.25	2.5	19.04	3.0	3.5
SWEDEN 2	1.7	4.7	1.4	1.2	-14.28	2.0	66.66	1.0	1.0

TABLE 22 - POULTRY MEAT EXPORTS ('000 METRIC TONS, CARCASS WEIGHT EQUIVALENT)

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
SWITZERLAND	0.5	.	0.4	0.2	-50.00	.	.	.	.
UNITED STATES 2	225.0	209.0	211.0	257.0	21.80	365.0	42.02	318.0	.
URUGUAY 2	2.0	4.0	2.0	4.0	100.00	4.0	0.00	4.0	.
YUGOSLAVIA 4	.	26.5	29.7	11.5	-61.27	13.3	15.65	17.7	.

1 EEC(12) since 1 January 1986
2 1987: estimate
3 Source: USDA, World Livestock and Poultry Situation, September 1987
4 Secretariat estimates: Brazil 1987, others 1987-88

TABLE 23 - SHEEPMEAT PRODUCTION ('000 METRIC TONS, CARCASS WEIGHT EQUIVALENT)

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
ARGENTINA 4	110.0	102.0	92.0	90.0	-2.17	90.0	0.00	88.9	.
AUSTRALIA 3	469.6	474.2	556.2	585.0	5.17	577.9	-1.21	585.0	601.0
AUSTRIA	0.9	1.2	1.3	1.4	7.69		.	.	.
BRAZIL 3,5	5.0	5.2	10.3	8.7	-15.53	10.0	14.94	10.0	11.0
BULGARIA	92.0	98.0	100.0	.	.	.	.	.	.
CANADA	8.7	9.2	8.5	8.8	3.52	8.2	-6.81	8.5	9.0
EEC 1	747.0	752.0	769.0	898.0	16.77	952.0	6.01	976.0	.
FINLAND 3	1.2	1.3	1.5	1.4	-6.66	1.3	-7.14	1.5	.
HUNGARY	24.3	27.2	.	6.8	.	.	.	.	.
NEW ZEALAND 3	665.0	686.0	728.3	629.0	-13.63	614.0	-2.38	593.0	590.0
NORWAY 3	22.7	23.9	24.2	25.0	3.30	23.0	-8.00	22.4	22.6
POLAND 5	17.0	20.0	25.0	30.0	20.00	28.0	-6.66	25.0	.
SOUTH AFRICA 2,3	216.4	221.4	211.0	195.7	-7.25	184.7	-5.62	190.0	195.0
SWEDEN 3	5.3	5.3	5.3	5.0	-5.66	4.9	-2.00	5.0	5.0
SWITZERLAND 3,4	2.7	2.9	3.2	3.3	3.12	3.5	6.06	.	.

TABLE 23 - SHEEPMEAT PRODUCTION ('000 METRIC TONS, CARCASS WEIGHT EQUIVALENT)

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
TUNISIA	28.4	30.3	31.7	33.1	4.41	35.8	8.15	37.8	.
UNITED STATES 3	170.0	172.0	162.0	152.0	-6.17	142.0	-6.57	153.0	.
URUGUAY 3	50.0	41.0	50.0	68.0	36.00	55.0	-19.11	55.0	.
YUGOSLAVIA 5	62.0	59.0	62.0	63.0	1.61	64.0	1.58	64.0	.

1 EEC(12) since 1 January 1986
2 1986: preliminary
3 1987: estimate
4 Source (1988): USDA, World Livestock and Poultry Situation, September 1987
5 1987-88: secretariat estimates

TABLE 24 - SHEEPMEAT CONSUMPTION ('000 METRIC TONS, CARCASS WEIGHT EQUIVALENT AND KG./CAPITA)

COUNTRY		1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
ARGENTINA	- TOTAL 5	88.0	85.0	80.0	80.0	0.00	80.0	0.00	.	.
	- PER CAPITA	3.0	2.8	2.6	2.6	0.00	2.5	-3.84	.	.
AUSTRALIA	- TOTAL 3	317.5	344.6	388.4	368.4	-5.14	345.1	-6.32	360.0	358.0
	- PER CAPITA	20.6	22.1	24.6	23.1	-6.09	21.4	-7.35	22.1	21.7
AUSTRIA	- TOTAL	0.9	1.2	1.3	1.4	7.69	.	.	.	.
	- PER CAPITA	.	.	.	.	.	.	.	.	.
BRAZIL	- TOTAL 3,4	4.4	4.6	9.9	26.0	162.62	12.0	-53.84	11.0	12.0
	- PER CAPITA	.	.	0.1	0.2	100.00	0.1	-50.00	0.1	0.1
CANADA	- TOTAL	19.9	21.8	19.4	24.1	24.22	25.0	3.73	25.0	25.0
	- PER CAPITA	0.8	0.9	0.8	0.9	12.50	0.8	-11.11	0.8	0.8
EEC	- TOTAL 1	965.0	956.0	991.0	1,116.0	12.61	1,150.0	3.04	1,170.0	.
	- PER CAPITA	3.5	3.5	3.6	3.5	-2.77	3.6	2.85	3.6	.
FINLAND	- TOTAL 3	1.3	1.4	1.5	1.4	-6.66	1.3	-7.14	1.5	.
	- PER CAPITA	0.3	0.3	0.3	0.3	0.00	0.3	0.00	0.3	.
HUNGARY	- TOTAL	3.7	4.0	.	0.5	.	.	.	.	.
	- PER CAPITA	0.3	0.4	0.4	0.3	-25.00	.	.	.	.
JAPAN	- TOTAL 5	165.0	150.0	159.0	159.0	0.00	160.0	0.62	160.0	.
	- PER CAPITA	1.4	1.2	1.3	1.3	0.00	.	.	.	.
NEW ZEALAND	- TOTAL 3	89.5	90.4	92.1	91.0	-1.19	90.0	-1.09	89.0	89.0
	- PER CAPITA	27.8	27.7	26.1	27.7	-1.42	27.2	-1.80	26.9	26.7
NORWAY	- TOTAL	23.8	23.6	24.6	22.7	-7.72	23.2	2.20	23.0	23.2
	- PER CAPITA	5.8	5.7	5.9	5.5	-6.77	5.6	1.81	5.5	5.5

TABLE 24 - SHEEPMEAT CONSUMPTION ('000 METRIC TONS, CARCASS WEIGHT EQUIVALENT AND KG./CAPITA)

COUNTRY		1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
POLAND	- TOTAL	17.0	21.0	38.0	36.0	-5.26	.	.	.	.
	- PER CAPITA	0.5	0.5	1.0	0.9	-10.00	.	.	.	.
SOUTH AFRICA	- TOTAL 2,3	222.0	242.0	229.0	212.0	-7.42	208.0	-1.88	204.0	200.0
	- PER CAPITA	7.0	7.4	6.8	6.1	-10.29	6.0	-1.63	5.9	5.8
SWEDEN	- TOTAL 3	6.1	5.8	6.2	6.5	4.83	7.0	7.69	7.0	7.0
	- PER CAPITA	0.7	0.7	0.7	0.8	14.28	0.9	12.50	0.9	0.9
SWITZERLAND	- TOTAL 3	8.4	9.2	9.5	9.7	2.10	10.0	3.09	10.5	.
	- PER CAPITA	1.3	1.4	1.4	1.5	7.14	.	.	.	.
TUNISIA	- TOTAL	33.4	34.8	32.7	34.1	4.28	36.8	7.91	38.1	.
	- PER CAPITA	4.9	5.0	4.6	4.6	0.00	4.9	6.52	4.9	.
UNITED STATES	- TOTAL 3	176.0	181.0	175.0	169.0	-3.42	142.0	-15.97	153.0	.
	- PER CAPITA	0.8	0.8	0.8	0.8	0.00	0.7	-12.50	0.7	.
URUGUAY	- TOTAL 3	39.0	36.0	43.0	45.0	4.65	44.0	-2.22	44.0	.
	- PER CAPITA	13.6	12.2	14.5	14.9	2.75	14.3	-4.02	14.3	.
YUGOSLAVIA	- TOTAL 5	55.0	37.0	53.0	52.0	-1.88	55.0	5.76	56.0	.
	- PER CAPITA	2.5	1.7	2.4	.	.	.	.	.	.

1 EEC(12) since 1 January 1986
2 1986: preliminary
3 1987: estimate
4 Total apparent consumption
5 Source: USDA, World Livestock and Poultry Situation, September 1987: Japan 1987-88, Yugoslavia 1986-88

TABLE 25 - SHEEPMEAT IMPORTS ('000 METRIC TONS, CARCASS WEIGHT EQUIVALENT)

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	FORECAST 1989
ARGENTINA	0.2	-	0.1	-	.	.	.	.	.
AUSTRALIA	1.4	4.9	4.9	2.0	-59.18	.	.	.	.
BRAZIL	-	-	-	17.0	.	1.0	-94.11	2.0	2.0
BULGARIA	-	-	0.4	0.6	50.00	.	.	.	.
CANADA	13.8	9.8	11.7	16.3	39.31	16.6	1.84	17.0	.
EEC 1,4	252.0	248.0	253.0	249.0	-1.58	248.0	-0.40	245.0	.
EGYPT 3	3.0	6.0	5.0	6.0	20.00	7.0	16.66	8.0	.
FINLAND	0.1	0.1	-	-	.	.	.	.	.
JAPAN 3	165.0	150.0	159.0	159.0	0.00	155.0	-2.51	160.0	.
NORWAY	0.3	0.4	0.4	0.8	100.00	0.2	-75.00	0.6	0.6
POLAND	-	-	18.4	0.2	-98.91	.	.	.	.
SOUTH AFRICA 2	4.4	5.6	9.0	11.0	22.22	14.0	27.27	14.0	14.0
SWEDEN 2	0.8	0.8	0.8	1.1	37.50	1.8	63.63	1.5	1.5
SWITZERLAND 2	4.8	5.4	6.2	5.6	-9.67	6.0	7.14	.	.
TUNISIA	1.1	1.4	0.5	.	.	.	.	.	.
UNITED STATES 2	9.0	9.0	16.0	18.0	12.50	20.0	11.11	23.0	.

1 EEC(12) since 1 January 1986
2 1987: estimate
3 Source: USDA, World Livestock and Poultry Situation, September 1987: Japan 1987-88, Egypt all years
4 1988: secretariat estimates

TABLE 26 - SHEEPMEAT EXPORTS ('000 METRIC TONS, CARCASS WEIGHT EQUIVALENT)

COUNTRY	1983	1984	1985	1986	% CHANGE 1986 /1985	1987	% CHANGE 1987 /1986	FORECAST 1988	1989
ARGENTINA	23.0	17.0	12.0	6.0	-50.00	.	.	.	.
AUSTRALIA 2,5	125.7	87.7	117.3	158.3	34 95	154.7	-2.27	152.0	.
BRAZIL	0.6	0.6	0.4	0.1	-75.00	.	.	.	.
BULGARIA	-	-	0.5	2.0	300.00	.	.	.	.
CANADA	0.2	-	0.1	0.1	0.00	0.1	0.00	0.1	.
COLOMBIA 2	-	-	0.1	0.1	0.00	0.1	0.00	0.2	.
EEC 1,4	5.0	5.0	5.0	5.0	0.00	5.0	0.00	.	.
HUNGARY	21.1	22.5	19.7	16.6	-15.73	.	.	.	.
NEW ZEALAND 3	522.3	488.6	526.5	467.7	-11.16	.	.	.	.
POLAND 2	6.2	6.3	7.3	7.9	8.21	10.0	26.58	8.0	.
ROMANIA 4	45.0	47.0	40.0	45.0	12.50	45.0	0.00	45.0	.
SOUTH AFRICA 2	-	-	0.2	0.3	50.00	0.3	0.00	0.3	0.3
UNITED STATES 2	1.0	1.0	1.0	1.0	0.00	1.0	0.00	1.0	.
URUGUAY 2	11.0	6.0	6.0	23.0	283.33	11.0	-52.17	11.0	.
YUGOSLAVIA 4	.	6.4	5.7	3.8	-33.33	7.0	84.21	10.0	.

1 EEC(12) since 1 January 1986
2 1987: estimate
3 Product weight
4 Source: USDA, World Livestock and Poultry Situation, September 1987: Romania all years, Yugoslavia 1987-88
5 1988: secretariat estimates