

ARRANGEMENT REGARDING BOVINE MEAT

Eleventh Annual Report

**THE
INTERNATIONAL
MARKETS
FOR
MEAT**

1990/91



GENERAL AGREEMENT ON TARIFFS AND TRADE

Geneva, January 1991

Introduction

The present document, the eleventh annual report concerning the world markets for meat, has been prepared by the GATT secretariat, on its own responsibility. It is mainly based on the work of 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. The report covers the situation in the market for bovine animals and meat for the year 1990, containing forecasts for 1991. 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. Summaries of significant trade policy developments which occurred in 1990 in the bovine meat sector (or which may have a close impact on the sector) in individual countries signatories of the Arrangement have also been included. Their coverage may not be exhaustive and sources used varied widely from country notifications to the GATT, to press reports. The report also provides short summaries of the general situation and outlook in the pig-, poultry- and sheepmeat sectors, and in selected countries.

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 to 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, the European Community, Finland, Guatemala, Hungary, Japan, New Zealand, Nigeria, Norway, Paraguay, Poland, Romania, South Africa, Sweden, Switzerland, Tunisia, the United States, Uruguay and Yugoslavia. Representatives of other countries as well as of international governmental organizations follow its work as observers.

Apart from the sources mentioned above, information from the following publications, inter alia, has been used: IMF Economic Outlook, IMF, October 1990 and OECD Economic Outlook, December 1990 and meat statistics; and various issues for 1990 of the following publications: World Livestock and Poultry Situation, United States Department of Agriculture; The Drovers Journal; In Brief, Australian Meat and Livestock corporation; European Weekly Market Survey, Meat and Livestock Commission; Informe Ganadero, Buenos Aires; Market Commentary, Agriculture Canada; Marche International du bétail et des viandes, CFCE; International Meat Secretariat Newsletter; Preços Agrícolas, Boletim Mensal, Brazil; and information supplied by the FAO/ECE.

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Notes: "Tons" in the document means "metric tons, carcass weight" unless otherwise stated. Figures for 1990 are preliminary. Figures may not add up due to rounding. Export and import figures in Table I and in the tables 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.

KEY ISSUES - KEY ISSUES - KEY ISSUES - KEY ISSUES - KEY ISSUES

1990

1. Beef and veal production increased, largely reflecting higher output in the European Community.
2. Bovine meat trade volume fell significantly.
3. International beef prices remained attractive, but seem to have levelled off through the year.
4. Consumption continued its long-term decline.
5. Economic slowdown, developments in the Central and Eastern European countries (including the USSR) and the Gulf crisis had a significant impact in the meat sector.
6. EC beef stocks built up again, while exports fell.
7. Brazilian exports decreased significantly.

1991

1. Beef and veal supplies are expected to increase while international demand could shrink.
2. International prices should level off.
3. Developments in the foot-and-mouth disease-free area remain more favourable and predictable than in the foot-and-mouth disease area.
4. Developments in the Gulf crisis, in Central and Eastern Europe and the USSR will continue to have a major impact on the meat industry.
5. European Community exports should rise sharply.
6. Brazil could be back in the export scene.
7. A successful outcome of the Uruguay Round would create a healthier environment for meat trade.

I. MAJOR FEATURES OF THE ECONOMIC SITUATION AND OUTLOOK

1. Estimates for 1990 show that the growth of the world economy declined from 3 per cent in 1989 to 2 per cent in 1990¹, a smaller increase than previously estimated. Clearly, this less favourable situation is partly due to the Gulf crisis. However, the combination with other factors, such as the contraction of output in Eastern Europe and in the USSR, the German unification and the short-term effects of macroeconomic adjustments in a large number of developing countries, must also be taken into account. In the OECD countries², two consecutive years of decline in output growth are currently foreseen (2.8 per cent in 1990 and 2.0 per cent in 1991). In Europe, economic conditions were, and will continue to be, affected by the German unification, with the short-term effect of a temporary fall in the level of output and employment and an expansion of the aggregate demand, especially for imports. Also, the pace of the process of economic integration of the EC has been accelerating, with new developments in the field of monetary union. In the United States, economic activity slowed down and inflation remained relatively high with the weakness of the dollar contributing to the inflationary pressure. In the meantime, the fiscal deficit continues to be a major unsolved problem. In the developing countries the negative effects of adjustment programmes, if they are successfully implemented, are expected to be largely offset this year and output growth is expected to reach 4.2 per cent (against 2.2 per cent in 1990). The process of decreasing divergence in growth among developing countries, those in Asia and the others, which started in 1989, practically came to a halt in 1990, due to a slowdown of economic growth in Asian countries, but in 1991 it is expected to recommence. Inflation is estimated to have increased in 1990 in both developed and developing countries, with inflation of consumer prices in developed countries reaching 4.3 per cent in 1989. In 1991 it could increase to 4.9 per cent. The rate of inflation in developing countries in 1991 should decrease, but again this forecast is based on the success of the macroeconomic reform programmes. Unemployment in 1990 reached 6.2 per cent in industrial countries, with some acceleration foreseen for the current year (6.7 per cent). As regards trade (according to GATT experts³), the volume of world trade in merchandise in 1990 is estimated not to have been seriously affected by the Gulf crisis and to have grown by about 6 per cent, against 8 per cent in 1989, the third largest gain in volume during the 1980s. Once again, the volume of world merchandise trade expanded at a significantly faster pace than world production.

¹IMF World Economic Outlook, October 1990

²OECD Economic Outlook, December 1990

³GATT International Trade 89-90, Volume I, 1990

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

Situation

2. In 1990, and once again, the bovine meat sector reserved its lot of surprises. Although for the moment the international markets evolution does not appear to be critical, a number of more or less unexpected factors clearly disturbed a relatively healthy situation. Moreover, an outlook, which only a few months ago seemed to remain rather promising, seems now somewhat compromised. Once more, those factors affected unevenly the market situation and outlook in the foot-and-mouth disease free area and in the infected area.

3. Among the major factors which had a significant impact on the situation and outlook, there were at least three extraneous to the meat sector. The general economic slowdown, developments in the USSR and other Eastern European countries and the Gulf crisis.

4. The general economic slowdown affected demand for bovine meat, at a moment when sanitary problems in some countries and more generally large supplies of poultrymeat, were already having a depressing influence in consumption. Developments in the USSR, where production was affected by shortages of fodder and feed and the distribution system disrupted, pressured for higher meat imports. However, these were tempered by deteriorated terms of trade and food-aid was needed. Developments in other Eastern European countries have led to rather unstable and contrasted situations. In some cases production seems to have increased and consumption fallen. In others, production fell but was accompanied by stronger consumption drops. Resulting increased availabilities of live cattle or meat, have partly ended up as increased exports to Western Europe and in particular the European Community. The Gulf crisis and the resulting ban on trade to Iraq and Kuwait (3-4 per cent of world beef imports in 1989) had a direct impact on bovine meat trade, but also meant higher oil prices and resulting higher production and transport costs in most countries.

Cattle numbers and production

5. Cattle herd rebuilding continued in major producing countries. But increased yields and improved efficiency in most of them generally, linked with increased feedgrain use and lower feedgrain prices, allowed for limited beef production falls. In some cases (European Community, Australia) increased cattle numbers resulted also in higher slaughter and increased output. As a result, in 1990, total estimated bovine meat production in participating countries increased by 1 per cent to 31.4 million tons. However, the production rise in the European Community was stronger than expected and was responsible for most of the total output increase for participating countries. Following improved returns in 1989, EC producers retained more cattle and in particular calves for fattening. Fed cattle in the Community now represents more than one third of the total slaughter mix. This, along with growing numbers of beef cows, allowed for increased slaughter and carcass weights, last year, the whole resulting in a 4.0 per cent output growth in the EC.

6. The other major producing country where a significant beef production rise (+8 per cent) occurred was Australia. The drought conditions, which began to be felt in the last quarter of 1989, continued through the beginning of last year and resulted in increased cattle slaughter. The slaughter structure now indicates that herd rebuilding is slowing down and will continue at a much slower pace than in previous years. In New Zealand production continued to decline due to herd rebuilding, supported by improved seasonal conditions and higher producer returns.

7. In North America firm cattle prices were also the reason for herd expansion. In the United States, where slaughter cattle prices have now been rising since mid-1986, producers seem to have finally decided to withhold their cattle. After a timid rise in the last July census, cattle numbers are estimated to have increased by 1.9 per cent last year.

8. In South America, the meat industry was once again faced with extremely difficult economic situations in both Argentina and Brazil. Cattle numbers and production should fall in the former but in Brazil, while cattle numbers were estimated to have continued their long-running rise, production could increase despite lower slaughter, due to higher weights. In Uruguay estimated production fell significantly in line with herd rebuilding.

Consumption

9. The long-term decline of beef and veal consumption in participating countries continued and was even accentuated in 1990. Low supplies and resulting increased retail prices are only part of the reasons behind the decline. Although the situation differed among the various countries, the general slowdown of economic growth may also have affected demand. Continuously rising availabilities of cheaper poultry meat undoubtedly accounted once again for a large part of the decrease. Estimated per capita consumption of poultry meat has decreased only in Egypt and Poland where difficult economic situations affected the consumption of all meats. In all other countries per capita poultry intake was up.

10. But in 1990, beef and veal consumption was also affected by sanitary problems. This was particularly the case in the European Community, where consumption fell by almost 4 per cent. The BSE outbreak in the United Kingdom resulted in a significant intake drop there and consumers' lack of confidence also affected demand in other EC countries. Efforts for the production of less bone and fat products, as well as consumption advertising campaigns, especially in North America, seem to have shown some success, but not enough to eradicate the general consumption fall.

Trade and international prices

11. In 1990, estimated bovine meat exports fell by some 3 per cent, to around 3.9 million tons, i.e., 120 thousand tons below in 1989. Although at this stage these figures can only be considered as indicative, they are illustrative of last year's market uncertainties. However, they also hide large discrepancies in the performance of major exporting countries. Among

these countries, only Australia, the United States, Argentina and Uruguay increased their exports. But although all the other major countries have seen their exports decline more or less significantly, the EC export decrease alone reached 284 thousand tons largely offsetting the export rise of all other participating countries.

12. Despite higher availabilities and increased export restitutions in August 1990, the decrease in the European Community exports seems due to relatively low export prices (exacerbated by a lower dollar value) but also to the loss of the Iraqi and Kuwaiti markets. A large sale to Brazil never materialized and sales (at least commercial) to Eastern Europe may have declined. Added to higher production and a declining consumption, the result could only be the resurgence of stocks estimated at 600 thousand tons by the year end. Last November the EC Commission decided to allow intervention purchases to continue beyond the 220-thousand-ton annual limit implemented in April 1989.

13. The Gulf crisis and developments in Eastern Europe have also affected South American exporters which, like the Community, operate mostly in the foot-and-mouth disease area. Argentina, which in the first half of the year increased exports to Iraq, Romania and the USSR, saw them reduced to nil or falling sharply in the second half. However, Argentina benefited from the sharp drop of Brazilian exports, especially canned product to the United States but also to the European Community. Strong demand for canned meat and also for high-quality beef allowed for increased export prices in Argentina. Cattle herd rebuilding in Uruguay resulted in lower production, but strongly reduced consumption allowed for somewhat increased exports. Brazil was relatively absent from the export scene last year due to a difficult economic situation, insufficient supply and deficient sanitary controls on canned meat exported to the United States. Imports from its neighbouring countries increased. In Australia, higher output was virtually all directed to the export market, particularly in response to strong demand and attractive, even if declining, import prices in the United States. Exports to Japan increased more moderately than expected in the first months of the year, reflecting market adjustment difficulties in this country. Herd rebuilding in New Zealand resulted in lower exports to all major markets and in particular to Japan. Export prices remained firm but seemed to be levelling off in the last quarter.

14. Estimated beef and veal exports, and especially live cattle exports, rose in some Eastern European countries, particularly in Poland. A large part of the exports went to the European Community. The unification of Germany has been pointed out as a further element at the origin of the EC market instability last year. Expected large sales from former East Germany to the USSR and Romania should have helped to alleviate the pressure.

TABLE I
SELECTED COUNTRIES' TRADE IN BEEF AND VEAL^{1/}

A. EXPORTS

	1989	Estimates 1990	% Change 1990/89	Forecast 1991	% Change 1991/90
ARGENTINA	360	450	25.0	450	0.0
AUSTRALIA	872	1,050	20.4	990	-5.7
BRAZIL	323	230	-28.8	460	100.0
CANADA	107	98	-8.4	105	7.1
EC	994	710	-28.6	725	30.3
NEW ZEALAND	436	380	-12.8	415	9.2
UNITED STATES	464	476	2.6	508	6.7
URUGUAY	177	181	2.3	126	-30.4
OTHERS ^{3/}	294	331	12.6	260	-21.5
TOTAL	4,027	3,906	-3.0	4,239	8.5

B. IMPORTS

	1989	Estimates 1990	% Change 1990/89	Forecast 1991	% Change 1991/90
BRAZIL	192	190	-1.0	152	-20.0
CANADA	158	173	9.5	170	-1.7
EC	406	412 ^{2/}	1.5	425 ^{2/}	3.2
JAPAN	502	562 ^{2/}	12.0	622 ^{2/}	10.7
UNITED STATES	987	1,021	3.4	998	-2.3
USSR ^{4/}	150	200	66.7	250 ^{2/}	0.0
AFRICA ^{4/}	461	400	-13.2	400	0.0
OTHER ASIA ^{4/}	238	268	12.6	290	8.2
MIDDLE EAST ^{4/}	59	66	11.9	78	18.2
EASTERN EUROPE ^{3/}	258	240	-7.0	270	12.5
OTHER EUROPE ^{3/}	26	20	-23.1	18	-10.0
TOTAL	3,437	3,602	4.8	3,673	2.0

^{1/} 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 estimates.

^{3/} Includes other exporting/importing countries participating in the Arrangement Regarding Bovine Meat. Estimates by the Secretariat.

^{4/} Source: USDA, World Livestock Situation, FL&P 4-90, October 1990

Outlook

15. The international bovine meat market situation of the last few months should temper the optimism of only some months ago, about the near future. Although the situation seems far from being critical, a number of developments invariably lead analysts to comparisons with the crisis in the early 1970s, which led some major countries to close their borders. Some elements of that crisis are present: rising oil prices, decelerating economic growth and even fears of economic recession in some cases, signs of inflation resurgence and increased unemployment. As at the beginning of the seventies, most countries are rebuilding cattle herds in response to relatively firm prices and production potential continues to grow.

16. However, the situation today differs significantly. Political and macro-economic co-operation and co-ordination increased among leading developed countries rendering major crisis if not inevitable, at least more predictable. The increase in oil prices was less significant than in the early 1970s and, at least during a short period, seems to be having a lesser effect than in the past. Cattle numbers are, in most cases, much lower in absolute terms. Also, cattle herd rebuilding occurs at a much slower pace in an increasing number of countries. Thus, although beef and veal potential production continues to grow, it now increasingly depends more on higher yields and improved efficiency than on increased cattle numbers. In other words, an excess of supply may have less devastating effects than in the past, and may well be more rapidly controlled as well.

17. In 1991, beef production is expected to rise in some major producing countries: in the European Community, reflecting increased slaughter and higher carcass weights; in the United States, where an increased percentage of fed cattle in the total slaughter mix should more than offset lower cattle cull; and in New Zealand, due to increased slaughter after the fluctuations which followed the drought. Production may also rise in Japan, stabilize or decline marginally in Australia, but should fall in other major countries. However, total beef and veal output of participating countries should rise next year. Underlying the expected production growth are also, in many cases, lower feed costs.

18. Consumption is projected to rise in a number of countries - the United States, the European Community, New Zealand and Japan being among the major ones. However, in the United States the rise is only due to the population growth. Although for specific reasons, per capita intake is projected to rise in the three other countries, there are no reasons to believe that, in most other cases, this will happen. On the contrary, the downward trend of per capita beef and veal consumption in a less favourable economic environment could continue and even accentuate in 1991, especially as lower feedgrain prices will once more allow for higher poultry meat (but also pigmeat) production, expected to rise in most countries.

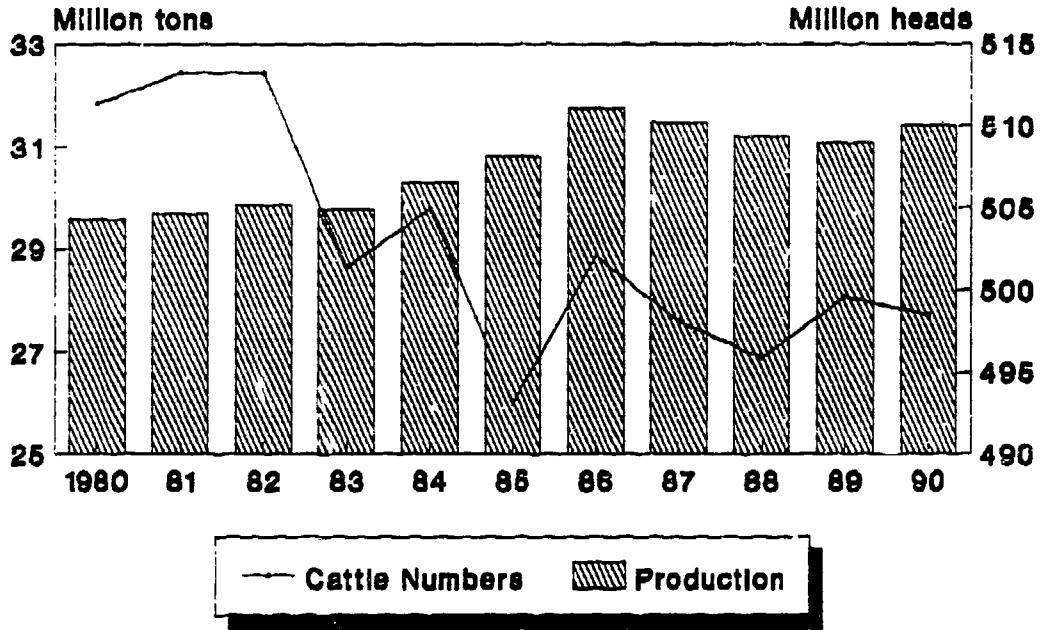
19. International demand for beef may shrink somewhat in 1991. Developments in the foot-and-mouth disease-free area remain more reasonably predictable, partly linked as they are to increased access commitments by Japan and Korea. In accordance with its access commitment, the Japanese import allocation system will be terminated next April. Although it will

be replaced by a 70 per cent ad valorem tariff (during the Japanese Fiscal Year 1991), Japanese imports are expected to continue their upward trend in response to strong domestic demand for imported beef. Other East Asian countries, and especially Hong Kong, could also import more beef this year. Increased supplies in both the United States and Canada should result in slightly lower beef imports. Increased Japanese imports are at the origin of continuously rising United States exports which this year, at slightly above 500 thousand tons, will reach a new record level. Despite an expected export rise also in New Zealand, availabilities in this area will nevertheless remain relatively tight, as an expected small rise in Canadian exports should be largely offset by a decline in Australia. International prices in this area could consequently remain firm.

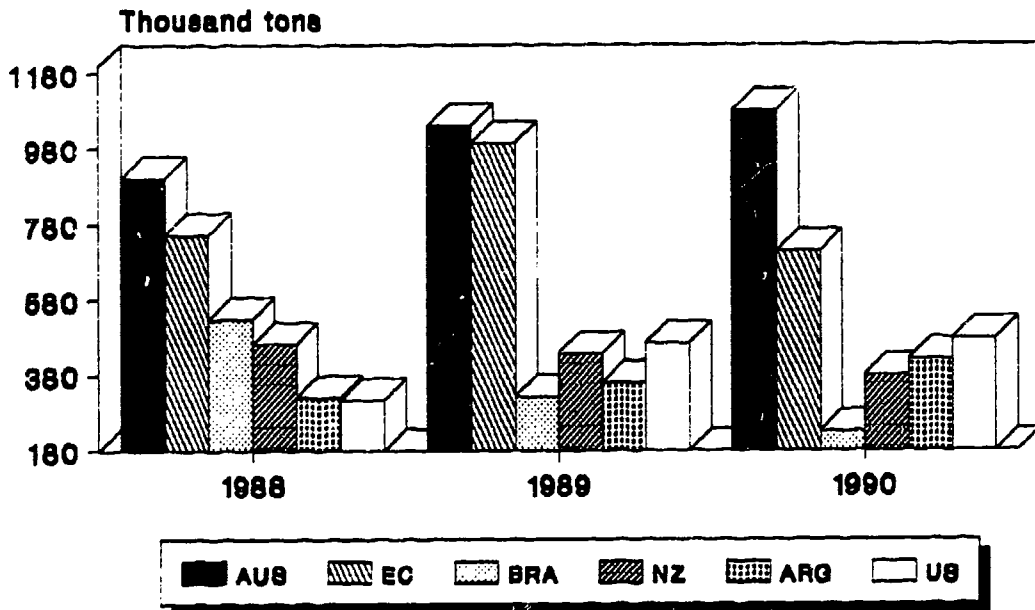
20. The outlook in the foot-and-mouth disease area is less clear and less promising. Import demand is dependent to a large extent on more or less unpredictable factors. These include developments in the Iraq/Kuwait crisis, the domestic market situation in Brazil and the situation in the USSR and some countries in Central and Eastern Europe. On the supply side, last year's accumulation of beef stocks in the European Community, along with an expected production rise there, will have a major impact on international trade in the area. In figures this means another EC export rise to close to 1 million tons. The rise will largely offset the expected decline in exports by Uruguay and maybe Argentina (and indeed of the totality of other participating countries) and may further add to the foreseen return of Brazil to the export scene. In these conditions, there does not seem to be much room for improved international prices in this area.

21. In summary, the international bovine meat market situation and outlook is certainly one which deserves close monitoring. Furthermore, the international bovine meat trade is still affected by a number of policy measures which restrict its expansion, liberalization and stability. It also remains a relatively compartmentalized trade. Recent bilateral agreements (Japan, Korea) have shown the advantages of a more open trade. However, a multilateral agreement remains necessary. In the Mid-Term Review of the Uruguay Round negotiations in April 1989, a consensus was reached regarding agricultural policies. Such policies should be more responsive to international market signals in order to meet the objective of international trade liberalization. Support and protection should be progressively reduced and provided in a less trade-distorting manner. An agreement was also reached on arrangements on sanitary and phytosanitary regulations. A successful outcome in the negotiations would represent the best opportunity for the creation of a healthier environment for bovine meat trade.

BEEF INDUSTRY IMC - COUNTRIES



BEEF AND VEAL EXPORTS SELECTED COUNTRIES



EXPORTER	AUSTRALIA 2)			EEC 3)			NEW ZEALAND 4)			UNITED STATES 5)			ARGENTINA 6)			URUGUAY 7)			BRAZIL 8)		
	1988	1989	1990	1988	1989	1990	1988	1989	1990	1988	1989	1990	1988	1989	1990	1988	1989	1990	1988	1989	1990
MIDDLE EAST	2.6	1.1	0.4	282.8	330.0	38.7	0.0	0.0	0.0	0.0	1.6	0.0	33.1	8.0	40.5	40.3	14.4	22.6			
of which	0.4	0.2	0.1	46.1	38.7		0.0	0.0	0.0	0.0	0.4	0.0	29.4	11.4	53.7	38.1	29.0	36.7			
EGYPT	0.0	0.0	0.0	83.5	103.0		0.0	0.0	0.0	0.0	0.1	0.0	11.0	0.0	10.1	5.4	4.4	5.4			
%	0.0	0.0	0.0	13.6	12.1		0.0	0.0	0.0	0.0	0.0	0.0	9.8	0.0	13.4	5.1	8.9	8.8			
ISRAEL	0.0	0.0	0.0	1.4	0.5		0.0	0.0	0.0	0.0	0.0	0.0	9.7	8.0	13.8	12.0	6.0	8.4			
%	0.0	0.0	0.0	0.2	0.1		0.0	0.0	0.0	0.0	0.0	0.0	8.6	11.4	18.3	11.3	12.1	13.7			
SAUDI ARABIA	0.5	0.3	0.1	20.9	21.6		0.0	0.0	0.0	0.0	0.9	0.0	5.8	0.0	4.0	5.3	2.4	2.0			
%	0.1	0.1	0.0	3.4	2.5		0.0	0.0	0.0	0.2	0.0	0.0	5.1	0.0	5.3	5.0	4.8	3.3			
IRAN	0.6	0.0	0.0	90.3	121.1		0.0	0.0	0.0	0.0	0.0	0.0	6.5	0.0	6.2	9.9	0.0	0.0			
%	0.1	0.0	0.0	14.7	14.2		0.0	0.0	0.0	0.0	0.0	0.0	5.8	0.0	8.2	5.4	0.0	0.0			
IRAQ	0.0	0.0	0.0	62.4	62.9		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.3	7.5	1.3	6.8			
%	0.0	0.0	0.0	10.2	7.4		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.4	7.1	2.6	11.1			
GULF (exc. Iran and S. Arabia)	1.5	0.8	0.3	12.0	12.9		0.0	0.0	0.0	0.0	0.6	0.0	0.1	0.0	0.0	0.2	0.2	0.0			
%	0.3	0.1	0.1	2.0	1.5		0.0	0.0	0.0	0.2	0.0	0.1	0.1	0.0	0.0	0.2	0.4	0.0			
OTHER	0.0	0.0	0.0	12.3	8.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.1	0.0			
%	0.0	0.0	0.0	2.0	0.9		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.2	0.0			
FAR EAST	185.3	270.3	167.2	5.6	9.0		23.6	28.3	15.7	158.3	303.7	105.7	8.2	5.7	2.3	3.9	2.6	4.4			
of which	31.6	45.7	40.9	0.9	1.1		8.0	10.2	7.6	73.8	80.1	66.1	7.3	8.1	3.1	3.7	5.2	7.2			
JAPAN	135.9	176.5	109.9	1.1	1.1		12.2	17.2	9.6	158.3	270.2	93.9	0.0	0.0	0.0	0.0	0.0	0.0			
%	23.2	29.8	26.9	0.2	0.2		4.2	6.2	4.6	73.8	71.3	58.7	0.0	0.0	0.0	0.0	0.0	0.0			
HONG KONG	4.1	3.3	2.2	0.8	0.6		3.3	2.8	2.9	0.0	2.8	4.0	5.5	4.0	1.6	1.1	1.0	3.2			
%	0.7	0.6	0.5	0.1	0.1		1.1	1.0	1.4	0.0	0.7	0.0	4.9	5.7	2.1	1.0	2.0	5.2			
REP. OF KOREA	10.1	58.9	35.3	0.0	0.0		0.0	0.0	0.0	0.0	21.5	11.8	0.0	0.0	0.0	0.0	0.0	0.0			
%	1.7	10.0	8.6	0.0	0.0		0.0	0.0	0.0	0.0	5.7	7.4	0.0	0.0	0.0	0.0	0.0	0.0			
TAIWAN	29.6	26.1	16.6	0.0	0.0		5.1	5.7	1.3	0.0	7.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
%	5.1	4.4	4.1	0.0	0.0		1.7	2.1	0.6	0.0	2.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
SINGAPORE	5.1	1.4	0.7	0.2	0.1		3.0	2.6	1.9	0.0	1.0	0.0	2.7	1.7	0.7	2.8	1.6	1.2			
%	0.9	0.2	0.2	0.0	0.0		1.0	0.9	0.9	0.0	0.3	0.0	2.4	2.4	0.9	2.6	3.2	2.0			
OTHER	4.3	4.1	2.5	3.5	7.0		0.0	0.0	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
%	0.7	0.7	0.6	0.6	0.8		0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
OCEANIA	12.1	12.8	7.4	2.1	3.3		6.0	6.2	2.9	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
%	2.1	2.2	1.8	0.3	0.4		2.0	2.2	1.4	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
OTHER	0.5	0.0	0.2	17.3	15.4		11.6	11.6	12.6	18.6	1.2	9.9	2.6	0.0	0.8	1.6	1.1	1.1			
%	0.1	0.0	0.0	2.8	1.8		3.9	4.2	6.1	8.7	0.3	6.2	2.3	0.0	1.1	1.5	2.2	1.8			
TOTAL	585.5	591.4	408.7	614.0	682.0		293.8	276.7	206.7	214.5	379.0	160.0	112.7	70.0	75.4	105.8	49.7	61.5			
%	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	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 AEC "In Brief", 1990: January-July.
 3) Source: Analytical tables, Nimex 1988 and 1989 - External Trade, Eurostat.
 4) Source: Replies to questionnaires, 1990: January-September.
 5) Source: USDA - Dairy Livestock and Poultry - Trade and Prospects, various issues, 1990: January-June.
 6) Source: Various issues of the Weekly Bulletin, Junta Nacional de Carnes, Argent ina.
 7) Source: Estadísticas - Instituto Nacional de Carnes, 1989: January-July.
 8) Source: Replies to questionnaires.
 9) For statistical purposes includes Morocco, Tunisia, Cote d'Ivoire, Togo, Ghana, Nigeria, Gabon and Congo.

III. COUNTRY-BY-COUNTRY ANALYSIS

European Community

Production rises, consumption and exports fall, stocks buildup again

22. Estimated cattle and calf numbers in the European Community increased by 1.1 per cent in 1989 for the first time since the implementation of the dairy quotas. The rise continued last year and by the year end the estimated cattle herd reached about 81.2 million head. Increased beef cow numbers, +355 thousand head, more than offset the fall in numbers of dairy cows in 1989. A similar evolution is estimated to have occurred last year (beef cows +5 per cent, dairy cows -1.8 per cent). Heifers, steers and calf numbers are also estimated to have increased in 1989 and last year. Estimates including the new German federal states show, for 1990, total EC cattle herd at 86.2 million head, with the number of dairy cows rising to 24.6 million head and beef cow numbers rising to 9 million head.

23. Reflecting improved market conditions, cattle and calf slaughter declined in 1989. The decline of calf slaughter (-8.8 per cent) was particularly accentuated and illustrates the increasing importance of feedlot operations in the Community. Female cattle and adult male cattle slaughter were also down and, as a result, beef and veal production fell, despite increased slaughter weights.

24. Growing cattle numbers allowed for increased slaughter in 1990. This, and a larger share of fed cattle (more than a third), in the total slaughter mix resulted in a production growth last year. The growth was stronger than expected and is currently estimated at 4 per cent (+300 thousand tons). Increased production was one of the factors which contributed to a relatively unexpected downturn of the Community bovine meat market last year. Signs of weakening cattle prices could be detected by the end of 1989, but it was last year and more significantly since the summer, that the price fall became evident.

25. The decline in demand at a moment of increasing output was another reason for weak market conditions. A less optimistic economic environment than earlier expected, due among other reasons to higher oil prices, may partly explain declining beef and veal consumption (estimated at -4 per cent, to 21.8 kg. per capita). Large availabilities of poultrymeat, whose intake continues to rise, are another reason. However, the major reason was probably the BSE outbreak in the United Kingdom. Consumers' lack of confidence affected demand there, but also, albeit to a lesser extent, in other EC countries.

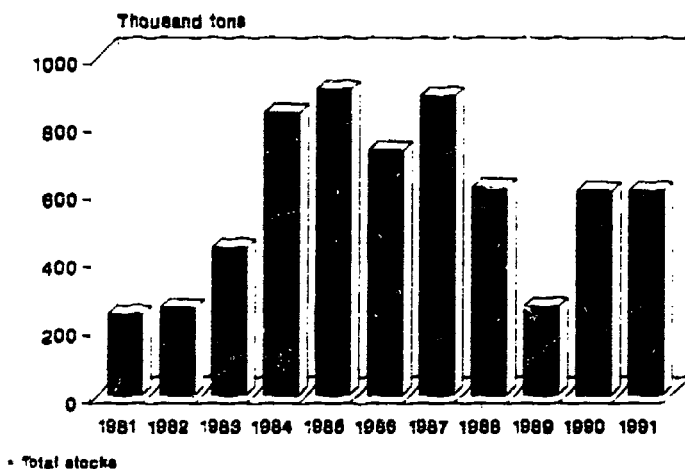
26. Depressed cattle prices were also due to continuing dry weather conditions, increased live cattle and meat imports from Eastern Europe and, since August, the trade ban on Iraq and Kuwait. Increased imports from Eastern Europe meant important entries of live cattle coming mostly from former East Germany, Poland and Hungary. (About 800 thousand head of young cattle would have entered the EC through former East Germany, but originating also in Poland and Hungary.) This also meant, maybe more importantly, very low prices for imported meat. The trade ban on Iraq and

Kuwait represented the loss of two markets which in 1989 had absorbed about 100 thousand tons of the EC product.

27. The cumulative effect of these factors was the acceptance of massive quantities of beef into intervention. At the beginning of November, 214 thousand tons would have been bought under the normal tendering system (6 thousand tons below the maximum authorized in normal circumstances - see policy developments below) and 240 thousand tons under the "safety net" arrangements. Estimated intervention purchases by the year end reached 650-660 thousand tons, up from 171 thousand tons in 1989. In the meantime, estimated sales totalled only 260 thousand tons. Intervention stocks, which in 1989 fell by 70 per cent, consequently rose sharply again to some 600 thousand tons. In 1991, beef and veal production are expected to increase further, not so much as the result of higher cattle slaughter, but especially due to increased weight, not taking into account the rise due to the new German states.

28. The difficult market situation in the European Community was exacerbated last year by falling export levels. Despite significantly increased export restitutions in August, in response to the falling dollar value, beef exports were estimated to drop by some 284 thousand tons. The decrease seems due to relatively lower export prices (independently of the dollar fall) but also, as indicated, to the loss of the Iraqi and Kuwaiti markets, as well as lower imports from certain markets due to fears of BSE. To help to relieve the pressure in the internal market, the EC continued social sales of meat in its territory and intensified food aid operations (corned beef) to third countries.

EC - STOCK LEVELS *
(on 31 December)



In September it agreed on a sale of 80,000 tons of intervention beef to Brazil. However, the sale did not materialize. Exports to some Eastern European countries last year were estimated to reach some 150 thousand tons, part of which would be as food aid. In 1991 beef and veal exports are forecast to rise by 30 per cent, to 925 thousand tons, approaching historical record levels again.

29. In 1990, beef and veal estimated imports reached 412 thousand tons (+1.5 per cent) in line with a higher balance sheet import quota, and a 3 thousand tons autonomous quota of high-quality beef. Live cattle imports had been forecast to fall but taking into account the strong imports from Eastern Europe described above, they were up by almost 5 per cent. The 1991 import quotas that the EC Commission has proposed so far, do not differ from those of last year: 34.3 thousand tons of high-quality beef

("Hilton beef"); 53 thousand tons of low-grade frozen beef ("GATT quota"); 2.25 thousand tons of buffalo meat; and 1.5 thousand tons of frozen thin skirt. Live cattle import quotas and balance sheet quotas have not yet been proposed.

30. It could be noted that the unification of Germany represents an additional 5 million head of cattle in the Community and an additional beef production of more than 350 thousand tons. Some 2.3 million cattle could have been marketed in former East Germany last year and dairy cow numbers would have to be reduced sharply (by an estimated 20 per cent) to be brought in line with EC dairy quotas. Exports of 140 thousand tons of beef to the USSR and of 30 thousand tons of beef and the equivalent to 10 thousand tons of live cattle to Romania was expected to absorb most of the excess supply (these quantities were agreed to by former East Germany, before the unification of Germany).

Policy developments

31. On 1 August 1990, beef and veal export restitutions were raised by between 17 and 25 per cent. Last November, the European Commission decided to allow intervention purchases to continue under the normal tendering system, beyond the 220 thousand tons annual limit implemented in April 1989. This decision is possible under the present legislation in "exceptional circumstances" or in the case of a significant decline in market prices. Last October, the European Commission decided to suspend pigmeat imports from the United States as from 1 November 1990 (but entry into the EC of all United States pork arriving in the Community before 23 November was permitted) and beef as from 1 January 1991. The ban is imposed on sanitary grounds, and will apply to meat originating in abattoirs failing to meet the EC health and hygiene standards. The United States requested consultations with the Community under Article XXIII:1 of the GATT.

	1989	Estimates 1990	% Change 1990/89	Forecast 1991 ^{1/}	% Change 1991/90
Cattle and calf numbers: ^{2/}	79,355.0	80,220.0	1.1	81,200.0 (86,200.0)	1.2
Beef and veal: ^{3/}					
Production	7,460.0	7,760.0	4.0	7,850.0 (8,205.0)	1.2
Consumption	7,400.0	7,120.0	-3.8	7,350.0 (7,705.0)	3.2
Imports	406.0	412.0	1.5	425.0 (425.0)	3.2
Exports	994.0	710.0	-28.6	925.0 (925.0)	30.3
Stocks ^{4/} of which intervention	258.0 131.0	600.0 600.0	132.6 358.0	600.0 600.0	0.0 0.0

^{1/} Figures in brackets include the new German Federal States

^{2/} '000 head, December of preceding year

^{3/} '000 tons

^{4/} Total stocks, 31 December

Finland

Limited shifting from dairy to beef cattle

32. According to the last June cattle census, herd reduction in Finland continued in 1990. It is well known that this reduction is due to efforts to curb milk production made since the beginning of the 1980s. Data show that last year's drop in dairy cow and calf numbers was, once again, accompanied by increasing beef cattle numbers. Even if the latter have increased by about 40 per cent since the beginning of the 1980s, they still represent a mere 4 per cent of total cattle numbers. Prospects for the replacement of meat produced as a by-product of dairy farming by specialized beef production remain very limited. This seems to be due to the comparatively low profitability of beef cattle and adverse climatic conditions in Finland.

33. Cattle slaughter grew during the first nine months of 1990. The rise, due to increased dairy cow cull, should have reached about 2.3 per cent by the year end. The implementation of certain milk levies this year may partly explain such an evolution. Indeed, the levies led to dairy farmers' lower net prices in the second half of the year, even if they remain at higher levels than year earlier. Furthermore, a dairy cessation scheme (the "milk bonus system") applying to some 70 thousand cows was introduced last November, also leading to higher dairy cow slaughter. Increasing

yields per cow resulted in higher slaughter weights, which in the first nine months of the year grew by 8 per cent. Higher cattle slaughter and increased weights resulted in an estimated 5.4 per cent production growth, to 113 thousand tons in 1990. Per capita consumption remained relatively unchanged, despite increased production and stable real retail prices.

34. Finnish self-sufficiency in beef and veal exceeds 100 per cent. Yet, estimated imports totalled 1 thousand tons last year, reflecting consumer preferences for high quality cuts. In the meantime higher production and a relatively stagnant consumption allowed for an increased surplus. Beef and veal exports, mostly canned and cooked, were consequently estimated to increase by two thirds this year in 1990. However, in the long run, Finland is expected to change from a net beef exporter into a net beef importer. Average carcass weights should not rise much more and the cattle herd should continue to contract rapidly due to the dairy policy measures.

	1989	Estimates 1990	% Change 1990/89	Forecast 1991	% Change 1991/90
Cattle and calf numbers	1,363.4 ^{1/}	1,357.4 ^{2/}	-0.4	1,243.0 ^{2/}	-8.4
Beef and veal ^{3/}					
Production	107.2	116.0 ^{4/}	8.2	118.0	-5.2
Consumption	104.6	109.0 ^{4/}	4.2	110.0	0.9
Exports	4.9	8.0	63.3	10.0	25.0

^{1/},000 head, 1 December ^{2/},000 head, 1 June ^{3/},000 tons

^{4/} Since 1990, a new data basis is used. The effective production and consumption rises 1990/89 would have been 5.4 per cent and 0.7 per cent, respectively.

Policy developments

35. Some product-specific marketing levies, which directly reduce the price received by producers, have been increased. Since 1 January 1990 dairies have been liable to a levy of FIM 0.04 per litre of milk received. Since 1 July 1990, a levy of a similar amount based on the fat content of milk produced was also implemented. Target producer prices for livestock products were increased as of 1 March 1990. The rise for milk prices was FIM 0.08/litre and the rise for beef was FIM 1.25/kg.

36. The export subsidy system was modified in 1990. Subsidies were reduced by the implementation of fixed export subsidies to all agricultural commodities, except eggs. For beef, and since 11 September 1990, the reduction was 12 per cent, to FIM 5 million/year. In an effort to further

divert production from milk to beef, the Finnish authorities raised the beef cow premium to FIM 1,700/head, covering some 17 thousand head.

Sweden

Phase-out of export subsidies as from July 1991 and sharp export fall in 1992

37. The effects of the termination of the two-price system for milk as of 1 January 1989 continued to be felt through 1990 and probably 1991. With a rise of close to 3 per cent last year, cattle numbers totalled 1.7 million head in June. After three years of significant falls, dairy cow numbers were up by 2.9 per cent, accounting for 33.6 per cent of the total cattle herd. However, they should fall back again by close to 9 per cent this year. Indeed, despite the cattle herd increase in 1990, it can be expected that sharp decreases will occur at least in the next two years, due to the new food policy which will enter into force on 1 July 1991.

38. After declining since 1986, cattle and calf slaughter resumed in 1989. The increase was of an estimated 7 per cent, due to higher dairy cow and calf slaughter. Cattle slaughter in 1990 and 1991 should rise by a further annual 2-3 per cent. Estimated beef and veal production increased by 6.5 per cent last year, to 147 thousand tons, reflecting again higher numbers of beef cows, increased cattle slaughter and carcass weights and a growing utilization of calves for beef production. A further rise is expected to occur next year in line with increased cattle slaughter. Thereafter production should fall back again.

39. With the exclusion of sheepmeat, where a decline was foreseen in response to the abolishment of consumer subsidies, consumption of all meats was expected to increase: pigmeat, reflecting lower retail prices; poultry meat, due to lower domestic feed prices which should also allow for lower retail prices; and beef and veal, reflecting increased production. Per capita consumption of the latter grew marginally to some 17.2 kg. in 1990 (+0.6 per cent). Consumption of all types of meat could grow further in the future as the result of the new agricultural policy.

40. In 1989, bovine meat imports reached 14.3 thousand tons, compared to 21 thousand tons in 1988, reflecting the production rise. In 1990, the market was relatively well balanced again, and estimated imports totalled 15 thousand tons. Frozen beef account on average for 60-80 per cent of total imports and Poland, Australia and Yugoslavia have been the major suppliers in the last few years. In 1989, exports of frozen meat totalled 4.6 thousand tons, 53 per cent of which went to Mexico and 21 per cent to the United States. Canned and cooked meat exports totalled 4 thousand tons, 65 per cent of which went to the Federal Republic of Germany. At an estimated 13 thousand tons, exports last year increased by 49 per cent, but remained far below the record levels (around 35 thousand tons) of the first half of the eighties. One of the aspects of the new agricultural policy to be implemented next July, is the discontinuation of export subsidies.

41. However, taking into account other aspects of the new policy in the dairy sector (which should lead to the liquidation of 60 to 100 thousand

dairy cows) and foreseen difficulties in limiting surplus production in the pigmeat sector, exports will still be granted some support. This support, will be lower than current subsidies and will be totally phased out in three years. Current estimates are still for an export rise this year, followed by a significant export decrease in 1992, to some 7 thousand tons.

Policy developments

42. A new agricultural policy will be introduced on 1 July 1991 and will be fully implemented after a five-year transitional period. It is based on the principle that agriculture should be subject to the same conditions as other sectors. Producers should only be paid for goods and services for which there is a demand. The main elements of the new policy concern border protection, mainly variable import levies, which will remain unchanged pending the outcome of the Uruguay Round negotiations, and the phase out of internal market regulations starting on 1 July 1991. As a result, collective financing of agricultural exports will, by and large, be discontinued. Thus, in the meat sector, internal support measures and export subsidies, will be abolished on 1 July 1991. However, due to parallel adjustment measures in the dairy sector and the foreseen difficulties in reducing pigmeat production, public means to assist exports will still be granted during a transitional period of three years (1991/1992 - SEK 200 million; 1992/93 - SEK 150 million; 1993/94 - SEK 100 million).

	1989	Estimates 1990	% Change 1990/89	Forecast 1991	% Change 1991/90
Cattle and calf numbers: ^{1/}	1,672.0	1,716.0	2.6	1,635.0	-4.7
Beef and veal: ^{2/}					
Production	138.0	147.0	6.5	152.0	3.4
Consumption	144.0	147.0	2.1	148.0	0.7
Imports	14.3	15.0	4.9	10.0	-33.3
Exports	8.7	13.0	49.4	15.0	15.4
	^{1/} ,000 head, June	^{2/} ,000 tons			

Norway

Surplus production in the export market

43. Contrary to earlier estimates for a significant decrease, estimated cattle herd in Norway declined only marginally in 1990, remaining close to 1 million head and reflecting lower cattle slaughter in the last two years. Declining numbers of dairy cows were partly compensated by increased bull figures. Although no separate data are available, it is possible that beef cow numbers are also rising somewhat. While in 1973 82 per cent of the cattle stocks were dairy cows, this percentage has gradually declined.

44. Beef production rose by almost 9 per cent, while veal output is seen 5 per cent below 1989. The rise was largely due to increased slaughtering of dairy cattle aimed at reducing dairy products surpluses. However, this also seems to signify that, like in other countries, calves are kept longer for feeding purposes. Calf slaughter fell from 57.6 thousand head in 1985, to only 19.4 thousand for 1989. Meanwhile average dressed carcass weights rose from 39.3 to 67.3 kg. Furthermore, last year calf slaughter is estimated to have risen due to the unusually large number of calves born in 1988, which are now ready for slaughter. Even if partly offset by a higher veal production, total bovine meat production this year is expected to decline slightly due to a 2 per cent drop in beef output.

45. Estimated bovine meat consumption grew by 2.3 per cent (1.7 per cent on a per capita basis, to 17.4 kg.) as a result of increased production. There are no prices available, but per capita consumption of other meats, with the exception of sheepmeat, was also up last year, suggesting a recovery in general private consumption which had slowed down in 1989. With an 19.4 kg. intake, pigmeat continued to be the preferred meat despite a slight production drop. While the consumption of sheepmeat should remain stable, for other meats it is expected to increase further next year.

46. The 1990 beef surplus production went to the export market. In absolute terms, the estimated 8 thousand tons exported are a relatively small quantity, but they constitute a record for Norway. Unfortunately there is no breakdown on the type of product exported, nor information on the destinations. Other Nordic countries have been among the major markets for the small quantities exported in the past. This year exports should decline to some 5 thousand tons. Surplus production also meant virtually no imports last year and the same should occur in 1991.

	1989	Estimates 1990	% Change 1990/89	Forecast 1991	% Change 1991/90
Cattle and calf numbers: ^{1/}	985.3	995.0	1.0	989.0	-0.6
Beef and veal: ^{2/}					
Production	75.3	81.8	8.6	81.4	-0.5
Consumption	73.3	75.0	2.3	75.4	0.5
Imports	1.5	0.0	-100.0	0.0	-
Exports	0.6	8.0	1,233.3	5.0	-37.5

^{1/},000 head, 1 January

^{2/},000 tons

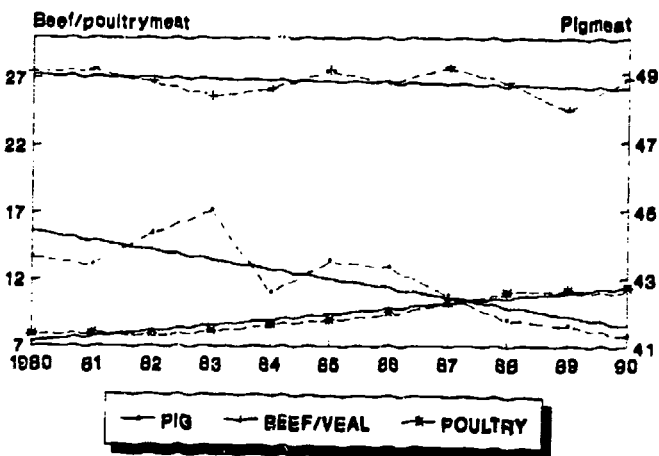
Switzerland

Climbing pigmeat prices, favour per capita beef consumption

47. After a surge in numbers in 1988 due to increased cow and, in particular, calf numbers, the Swiss cattle herd stabilized in 1989. This stability hides the decline in dairy cow numbers and almost unchanged calf figures, but a rise in beef cattle. A 9 per cent increase in real producer prices was at the origin of the herd growth in 1988. Conversely, a price drop of close to 6 per cent in 1989 seems to have discouraged producers. As the price decline trend accentuated during the first nine months of last year (-9.4 per cent), it can be assumed that cattle numbers fell in 1990.

48. Confirming cattle herd evolution, slaughter fell by 11 per cent in 1988, remained almost unchanged in 1989 and, during the first nine months of 1990, was up again. It was estimated at 780 thousand head, +3.4 per cent by the year end. During the first three quarters of the year, the average slaughter weight rose by more than 4 per cent, due to increased adult cattle cull and lower calf kill. Higher adult cattle slaughter resulted in a beef production rise during this period, while veal output was down. Estimated total beef and veal production by the year end reached 160 thousand tons, 3 per cent above 1989.

SWITZERLAND - MEAT CONSUMPTION PER CAPITA TRENDS (KG.)



49. Bovine meat consumption increased by almost 4 per cent from January to September 1990. The rise was due to increased output and consequent lower beef retail prices. It also reflects higher pigmeat retail prices resulting from falling pigmeat production. Beef and veal consumption was estimated to reach some 27 kg. per capita (+9 per cent) last year. Lower production levels this year could result in a consumption drop.

50. From January to September 1990, live cattle imports fell to 3 thousand head (-1 thousand head). At 7 thousand tons, beef and veal imports remained unchanged. Almost 60 per cent were fresh and chilled and although the import origin is not yet available, most of this product traditionally comes from Argentina, the European Community and Brazil. Frozen beef (20 per cent of total imports) originates mostly in Argentina and Brazil, while canned products (27 per cent) come mostly from the EC.

	1989	Estimates 1990	% Change 1990/89	Forecast 1991 ^{3/}	% Change 1992/91
Cattle and calf numbers: ^{1/}	1,850.3	1,850.0	0.0	1,840.0	-0.5
Beef and veal: ^{2/}					
Production	155.2	160.0	3.1	157.0	-1.9
Consumption	173.9	170.0	-2.2	168.0	-1.2
Imports	10.5	8.0	-23.8	12.0	50.0
	^{1/} ,000 head, 21 April	^{2/} ,000 tons		^{3/} Source: OECD	

Policy developments

51. Target prices for certain categories of cattle were increased as from 1 February 1990. Fat bull prices increased from Sw F 640 to Sw F 650 and calf prices from Sw F 975 to Sw F 1,005. Cows, heifers and oxen target prices remained unchanged.

Austria

Live cattle exports down, beef up

52. Cattle herd liquidation seemed to have come to an end in 1989. At 2.6 million head, cattle numbers increased by almost 1 per cent. The end of the liquidation phase seems confirmed by a 5.4 per cent drop in cattle slaughter and especially a 9 per cent reduction in both calf and female cattle cull. Although there is no data available, historical trends suggest that after four years of herd reduction, a new herd rebuilding

phase is on its way. It is estimated that cattle numbers continued to rise in 1990.

53. In 1989, estimated beef and veal production fell by around 5 per cent, to some 215 thousand tons, reflecting lower cattle slaughter. Some recovery is expected to have occurred last year. Per capita consumption, currently estimated at 21.5 kg., has fallen since 1987/88 by 1-2 per cent per year. During the same period pigmeat consumption went up by almost 5 per cent, and poultrymeat by 2.5 per cent. This is due to a clear consumers' preference for pigmeat, but as in many other countries, also to more competitive prices of both pigmeat and poultrymeat.

54. Until the 1980s, Austria exported 40 to 50 thousand heads annually and 3-10 thousand tons of beef and veal. Since then, the trade pattern has gradually changed and, since 1985, bovine meat exports have turned around 50-60 thousand tons and live cattle 10-20 thousand heads. In 1989, live cattle exports fell to 7 thousand head, due to a sharp drop in sales to Lybia (-62 per cent) traditionally, and by far, Austria's major market. Italy usually absorbs about 90 per cent of the meat and 43 thousand tons, product weight, were sold for a value of US\$ 1.666 million in 1989. Increased production in 1990 could have lead to increased exports.

	1989	Estimates 1990 ^{3/}	% Change 1990/89	Forecast 1991 ^{3/}	% Change 1991/90
Cattle and calf numbers: ^{1/}	2,562.0	2,650.0	3.4	2,659.0	0.3
Beef and veal: ^{2/}					
Production	215.0	218.0	1.4	221	1.4
Consumption	166.0	165.0	-0.6	164	-0.6
Exports	49.0	52.0	6.1	550	5.8
^{1/} ,000 head		^{2/} ,000 tons		^{3/} Secretariat estimates	

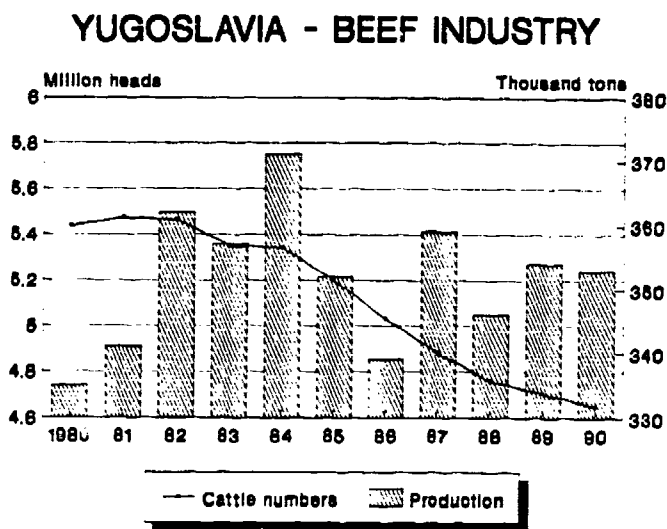
Yugoslavia

Cattle numbers down again ...

55. Cattle and calf numbers in Yugoslavia have been falling without interruption since 1982 and reached a new historical low record in 1989, totalling 4.7 million head. As in the last two years, the fall was due to a decline in numbers of all categories of cattle, with particular emphasis on dairy cows whose numbers dropped by 1.5 per cent.

56. In 1989, cattle slaughter declined reflecting improved feed availabilities and possibly also sharply increased producer prices. Since the State price control came to an end in 1988, producer prices have carried on increasing. Although the rise largely reflects extremely high inflation rates, it appears from the supplied official data that real prices increased by as much as 282 per cent in 1989. Such an increase should encourage producers to withhold their cattle but, in a country where inflation rates reach record levels, this is difficult to predict.

57. Despite lower cattle slaughter, beef and veal production increased by 2.3 per cent in 1989, to 354 thousand tons, reflecting increased weight. Although no official forecast is available concerning 1990, the secretariat has foreseen only a marginal decline in output to some 365 thousand tons, based again on possible higher slaughter weights following improved pasture conditions and increased corn production as a result of better crops in 1989/90. Reflecting the sharp rise in producer prices, beef and veal average retail prices were up by 185 per cent, in real terms, between 1988 and 1989. Such an increase, at a moment of major social and economic difficulties, might have implied a significant drop in



consumption both in 1989 and last year. However, official data for 1989 show an unchanged 14.1 kg per capita consumption compared to year earlier, while the USDA estimated total consumption shows an increase in 1990.⁴

58. Due to the production rise, Yugoslavia was able to increase somewhat its bovine meat exports in 1989. This was also possible thanks to a stagnant consumption and especially to increased imports. Indeed, the bovine meat trade deficit increased in volume terms: 21.2 thousand tons in 1988 and 28.6 thousand tons in 1989. (In 1989, beef and veal exports increased by 2.9 thousand tons, while imports rose by 10.3 thousand tons.) However, in value terms, and as a result of the high average value of the "baby-beef" sold to the European Community (Italy and Greece, especially), the total value of exports still overcame the import value by some US\$21 million. As is traditionally the case, the bulk of Yugoslavia's bovine meat exports went to the European Community (about 80 per cent), while imports from the EC amounted to 60 per cent of the total, the rest

⁴USDA - World Livestock Situation, FL&P 2-90, October 1990.

coming by and large from neighbouring Eastern European countries (Czechoslovakia, Hungary and Poland).

59. In 1989, while live cattle imports increased, exports declined somewhat (-2.3 per cent). In recent years the pattern of Yugoslav exports has been changing and declining quantities of exported bovine meat have corresponded to higher levels of live cattle sales abroad. The decline in live cattle export in 1989 was the first one since 1984, but it continued last year.

60. During the first nine months of 1990, beef and veal imports totalled close to 50 thousand tons, while exports reached 25.4 thousand tons. In the meantime, live cattle imports had already nearly doubled compared to the twelve months of 1989, and exports were clearly down. It is expected that an almost unchanged consumption this year will lead to lower beef and veal import levels and a certain stabilization of current export levels.

	1989	Estimates 1990 ^{3/}	%Change 1990/89	Forecast 1991 ^{2/}	%Change 1991/90
Cattle and calf numbers ^{1/} :	4,705.0	4,650.0	-1.2	4,630.0	-0.4
Beef and veal ^{2/} :					
Production	354.0	353.0	-0.3	350	-0.8
Consumption	321.0	325.0	1.2	326	0.3
Imports	63.7	65.0	2.0	60.0	-7.7
Exports	35.1	30.0	-14.5	30.0	0.0

^{1/} '000 head, 15 January

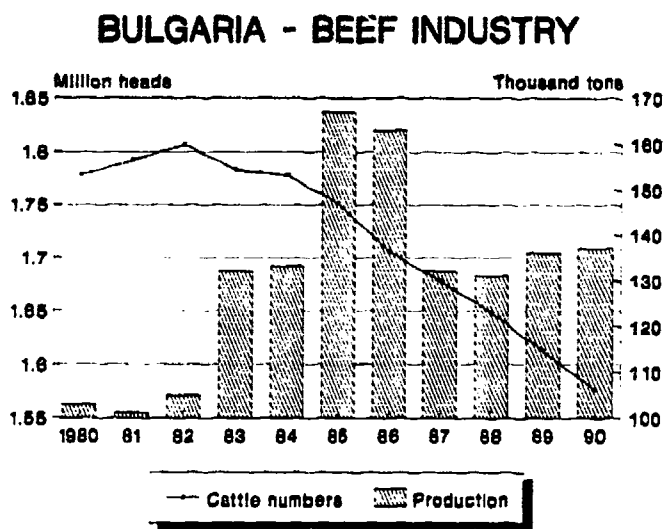
^{2/} '000 tons

^{3/} Secretariat estimates

Bulgaria

Cattle herd depletion continues

61. At 1.58 million head, estimated cattle numbers by January 1990 were down by 2.2 per cent, suggesting that the cattle herd decline continued, reaching its lowest level in the last fifteen years. This decrease, added to reported cattle feeding difficulties, led to a continuous bovine meat production fall over the last five years. The decline between 1985 and 1989 was close to 40 thousand tons, or 28 per cent. (In 1985 production reached the historical record level of 167 thousand tons.) Current estimates for 1990 put beef and veal production at 137 thousand tons, up by 0.7 per cent compared to 1989, assumingly due to improved feeding conditions and consequent increased weight.



62. The USDA estimates Bulgarian bovine meat consumption to have fallen again last year by some 1.5 per cent, to 131 thousand tons, or an approximate 12.8 kg. per capita. At 4.5 thousand tons during the first half of the year, imports were 70 per cent below the 1989 level during the same period. Supplying sources were the Democratic Republic of Germany, the European Community (Germany, Fed. Rep. and Ireland) and Poland. In 1988, after ten years of trade surplus, Bulgaria again became a net importer of bovine meat. Current trends do not suggest that this pattern might change this year. During the first six months of 1990, exports amounted to only 900 tons. Of these, 800 tons went to Jordan. During the same period, live cattle exports dropped from 11.7 thousand head in 1989, to 3.4 thousand head last year.

Policy developments

63. Bulgaria abolished all forms of agricultural planning in the beginning of 1990. Changes in the economic legislation have been implemented in order to bring about equal conditions for the operation of public and private enterprises. The dismantling of monopolies which affected the production and trade of agricultural products (including meat) has started. A draft law on land reform, which would encourage private farming is currently under discussion in the Parliament. Prices of fruit and vegetables were liberalized and further price liberalization should intervene soon. However, it is not expected that they concern the meat sector for the time being. Nevertheless, subsidies cuts should also apply to meat.

explain the total meat consumption decline of the last few years. Nutritional preferences in Hungary have always been for pigmeat and the demand for beef is relatively small and has declined. Increased prices divert demand for cheaper meat and poultry meat has recently seen its share in total meat intake increase significantly. Per capita beef consumption is currently estimated at about 7.5 kg. compared to 8.9 kg. in the mid-80s.

66. Exports of live cattle and beef have continuously decreased in recent years, in line with falling cattle numbers and production. Live cattle and beef export markets are traditionally the European Community, the Middle East (chilled beef) and the USSR (frozen beef). Things changed somewhat since last year. In 1987-88 the USSR was still the major market, but the Middle East played a more important rôle. Sales to the EC remained relatively low. In 1989 sales of beef and live cattle to the Community were up and beef exports to the USSR declined somewhat. In 1990, estimated cattle and beef exports reached the lowest levels of the last few years. Live cattle exports are estimated to have fallen to some 100 thousand head, from 140 thousand head in 1989. According to official data, Hungarian sales of young cattle to the EC concerned only a small share of total EC imports. Also, sales to the USSR fell sharply, reflecting deteriorated terms of trade in this country (and the end of oil barter deals) as well as the Hungarian quest for hard currencies. Sales to the Middle East were reduced reflecting low prices there. Beef and veal export are also estimated to have fallen substantially (-24 per cent) due to similar reasons. The USSR, Yugoslavia and Romania were the major markets, and small quantities of high quality cuts went to a number of European countries. Imports of both live cattle and bovine meat were down sharply. Bovine meat exports to the Middle East should have been somewhat affected by the import ban on Iraq and Kuwait, as this last country was a growing market for Hungarian chilled beef.

	1989	Estimates 1990	% Change 1990/89	Forecast 1991 ^{3/}	% Change 1991/90
Cattle and calf numbers ^{1/} :	1,598.0	1,550.0	-3.0	1,540	-0.5
Beef and veal ^{2/} :					
Production	98.2	95.0	-3.3	94.0	-1.1
Consumption	84.5	83.0	-1.8	82.0	-1.2
Exports	33.7	25.0	-25.8	23.0	-8.0
Imports	11.9	5.0 ^{3/}	-58.0	4.5	-10.0

^{1/},000 head, 1 January

^{2/},000 tons

^{3/} Secretariat estimates

Poland

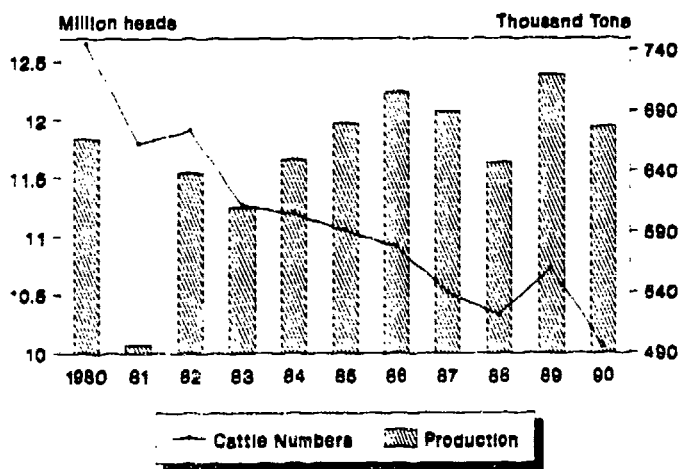
Low profitability leads again to falling cattle numbers

67. After a surge in 1989, due to good harvests and a 30 per cent rise in real producer prices following the introduction of market mechanisms, cattle numbers fell again. The last June census showed a significant drop, -6.4 per cent, to 10 million head. This was the result of a 10.2 per cent fall in breeding and slaughter cattle numbers and is a return to the one decade long decline of the Polish cattle herd. Current forecasts are for a continuing cattle herd decline until at least 1992 (although the decline this year could be marginal), when it should fall below 10 million head.

68. Lower cattle producers' profitability is the cause for falling cattle numbers. Among the reasons for reduced profitability are the weak demand for agricultural products due to increased food prices; an unfavorable relation between cattle and milk purchasing prices in comparison with soaring costs of production; and the unfavorable relation between cattle purchasing prices and those of pig. Reflecting the weak demand for cattle due to Polish consumer preference for pigmeat, cattle prices (which under the price control system approached pig prices) fell to less than half pigmeat prices.

69. The sharp decline in cattle prices led to increased cattle slaughter during the first months of 1990. Although no data are available, the increase was significant enough to lead the government to implement an intervention buying-in scheme for meat (see Policy developments, below). During the first quarter of the year, 36 thousand tons were bought in. However, estimates are that slaughter diminished in the course of the year and projections for beef and veal production were for a 6 per cent drop, to around 680 thousand tons in 1990. Due to the evolution of the cattle herd, it is expected that beef and veal production will fall in the next two years.

POLAND - BEEF INDUSTRY



70. Declining real incomes and soaring retail prices (more than 400 per cent during the first six months) along with inflation, are at the origin of an estimated 5-10 per cent consumption drop last year. In these conditions, per capita consumption would, at 15 kg., fall back to levels of fifteen years ago. Expected production trends and the continuing difficult economic situation in the country are a clear indication that the consumption declining trend will continue through 1991/92.

71. Import data for 1990 are not available. Poland did nevertheless import bovine meat in the first months of the year to meet periodic shortages of meat. It also received EC-originated beef as food aid. But, as a result of the declining trend of consumption, imports are believed to have fallen significantly last year. A similar trend could occur this year. Along with the intervention buying-in scheme, beef and veal exports were the other outlet for the excess of beef supply in the internal market.

72. During the first quarter 1990, exports of bovine meat doubled. This means that during that quarter alone, beef and veal exports amounted to 59 thousand tons against only 70 thousand tons in 1989 as a whole. Current estimates put 1990 bovine meat exports at about 150 thousand tons, more than twice as much as in 1989. Reasons for such rises in both meat and live cattle exports seem to be due to the sharply higher production costs and an increasingly difficult competition with pigmeat in the internal market. Poland is also a major live cattle exporter. In 1990 estimated live sales abroad increased by as much as 5.5 per cent, reaching some 1.34 million heads. Exports of slaughter cattle for fattening rose by some 80 per cent which went mostly to the European Community, while slaughter cattle went to the Middle East. The level of exports this year may, more than in the past, depend on the price relation between the internal market and the international markets.

Policy developments

73. Poland has, since 1988, introduced an extensive reform of the agricultural policy. The general lines of this reform have been reflected in "The international markets for meat, 1989/90". Since then new changes have occurred and will continue to occur in the near future. Agriculture support currently takes, among others, the following forms: Fertilizers and exterminant subsidies; suspension of import duties on agricultural machinery including animal production mechanization; preferential credits for agriculture; detaxation of agricultural machinery firms. Furthermore, a new "Agency for the Agricultural Market" was set up which, among tasks of a general nature (market analysis, price monitoring, etc.) has the specific rôle of an intervention body, with intervention buying-in and selling power, as well as the possibility of importing food stuffs.

	1989	Estimates 1990	% Change 1990/89	Forecast 1991	% Change 1991/90
Cattle and calf numbers: ^{1/}	10,733.0	10,049.0	-6.4	10,000.0	-0.5
Beef and veal: ^{2/}					
Production	720.0	677.0	-6.0	626.0	-7.5
Consumption	620.0	573.0	-7.6	544.0	-5.1
Imports	113.0	20.0 ^{3/}	-82.3	20.0 ^{3/}	0.0
Exports	70.1	150.0	114.0	68.0	-54.7

^{1/},000 head, June ^{2/},000 tons ^{3/}Secretariat estimates

South Africa

Beef retail prices up, despite falling wholesale prices

74. After a 5 per cent rise in 1989, cattle and calf numbers in South Africa remained stable, (up by a marginal 0.1 per cent) at an estimated 8.6 million head. Yet this slowdown is not announcing the end of the herd rebuilding initiated in 1986. Cattle numbers should increase further, and faster, in the next months to reach 8.9 million head in 1992. The South African cattle herd is thus approaching its historical record levels of the second half of the seventies.

75. During the first half of 1990, cattle and calf slaughter was up by 22.2 per cent. By the year end the rise was estimated at 10.4 per cent. This follows a 5 per cent increase in 1989, while in 1991 a further 8 per cent growth is forecast. Meanwhile, female cattle slaughter, varying between 33 to 35 per cent of total slaughter, is somewhat high. This evolution seems somewhat contradictory to a cattle herd rebuilding phase. The explanation for this discrepancy is that it seems that slaughter data only relate to the so-called "controlled meat areas" in South Africa. (Bovine meat production in these areas, calculated by cattle slaughter, represents almost 70 per cent of the official total production figure.)

76. Beef and veal production (about 63 per cent of total meat output) increased by 11 per cent during the first six months of last year. The rise reflects higher slaughter levels (even if the rise occurred only in the "controlled areas"). By the year end, estimated beef and veal output was 642 thousand tons, up by 6.6 per cent. Slaughter weights should have decreased slightly, reflecting less adult male cattle in the total response to expected lower producer returns.

slaughter mix. This trend is expected to continue in the next two years, but production is forecast to rise until 1994-95. This reflects the current (and government subsidized) switch from maize to livestock production and the continuing growth of feedlot operations.

77. Revised data suggest that the decline in per capita bovine meat consumption initiated in 1982 came to a halt in 1989 (+3.6 per cent, to 16.7 kg.). This rise was due to an 8.5 per cent drop in real retail prices. Current estimates are for a 1 per cent growth last year, followed by further increases in the next two. The more modest consumption rise of last year was the result of increasing retail prices. During the first six months, real retail prices were up by 7.4 per cent. During the same period, producer and wholesale prices have fallen by around 8 per cent. The reason for this anomaly seems to be a very restrictive registration scheme for butchers for retail outlets operated by the South African Meat Board. The scheme had the effect of limiting competition among butchers. However, it was liberalized in the last few months of 1990, and price competition among butchers is now expected to play a better rôle than in the past. Consumption of other types of meats should also increase this year.

78. Because beef and veal consumption is growing at a much slower rate than production, South Africa is approaching a situation of self-sufficiency. The ratio reached some 96 per cent last year and is seen at some 98.3 per cent in 1991. As a result, imports already down in 1989 fell again by as much as 74.5 per cent during the first half of last year. By the year end imports amounted to an estimated 34.1 thousand tons, against 57.9 thousand tons in 1989. Another 47 per cent drop should occur in 1991. Live cattle imports are going through a similar evolution: 158 thousand head in 1990 (-8 per cent) and a further 5 per cent drop in 1991.

	1989	Estimates 1990	% Change 1990/89	Forecast 1991	% Change 1991/90
Cattle and calf numbers: ^{1/}	8,611.0	8,620.0	0.1	8,816.0	2.3
Beef and veal: ^{2/}					
Production	602.7	642.3	6.6	645.0	0.4
Consumption	653.3	668.7	2.4	656.0	-1.9
Imports	57.9	34.1	-41.1	18.0	-47.2

^{1/} 000 head, 31 August

^{2/} 000 tons

Argentina

Sharp exports rise due to declining consumption ... and the Brazilian absence

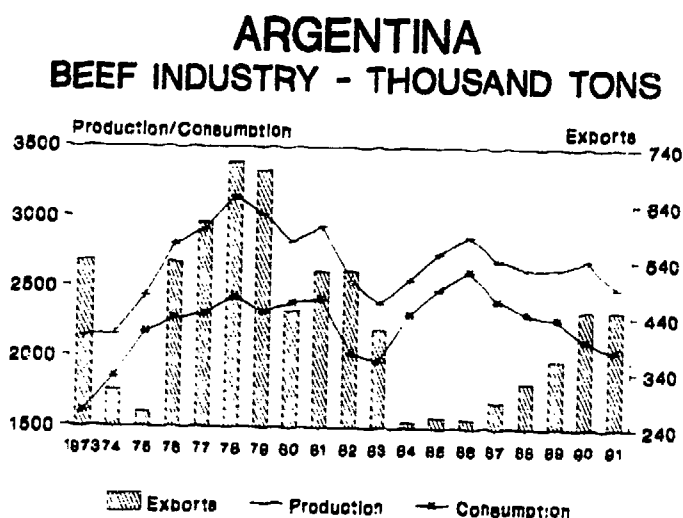
79. Estimated cattle numbers in Argentina continued to decline in 1989 and last year and are currently below 50 million head. The decrease, almost uninterrupted in the last twenty years, is linked to the international trade crisis of the seventies and the beginning of the eighties, but is also due to erroneous and frequently changing internal policies (both sectorial and general economic orientations) through the years. Such policies lead to an increasing disinvestment in the sector. Efforts are currently being made in Argentina to streamline the sector. However, in an extremely difficult domestic economic environment, this is certainly not an easy task.

80. In 1990 estimated cattle slaughter increased slightly to 12.5 million head, but remained some 3 per cent below the 1980s average. Steer slaughter represented a higher than usual 30 per cent of total slaughter, but was partly compensated by a decline in calf slaughter. Inspected cow slaughter fell to about 41 per cent (from 44 per cent last year) of inspected slaughter.

81. Despite the forecast released last June for an output decline in 1990, higher slaughter should have led to an estimated 2.3 per cent growth, pushing beef production to 2.7 million tons. Moreover, the cattle slaughter mix included a larger percentage of heavier steers. The supply of replacement steers has been relatively low and consequently producers are tending to prolong the retention periods which result in heavier weights.

82. The rise in production was entirely absorbed by the exporting sector. The June forecast showed an 8.6 per cent drop in per capita consumption, to 64 kg. last year. This would practically be the lowest level of the last twenty years. Even if the decline may be less accentuated than expected in June, it is obvious that Argentinian per capita beef consumption is now well below the 85-90 kg. level of the second half of the seventies. This seems due to declining incomes and generally deteriorated economic conditions in the country.

But it is also linked to the lower cattle herd and production levels which, at that time, turned around 3 million tons.



83. Exports by the year end were expected to reach 430-450 thousand tons, more than 20-25 per cent up on 1989. Strong demand for canned beef and high quality cuts seems to explain the strong rise. Estimated export prices averaged 10-15 per cent above 1989. Argentinian exports have largely benefited from the relative absence of Brazil from the international markets. Adding to the difficult domestic economic situation and insufficient beef supplies, Brazil has been faced last year with sanitary problems which affected its exports of canned meat to the United States. Argentina was the first beneficiary of such a situation, not only because it sold more beef to the United States, but also because it increased sales to Brazil itself. Exports have also been sustained by a declining United States dollar value. During the first half of the year, and apart from sales to its major markets (the EC and the United States), Argentina exported beef to Iraq, Angola, Romania, the Soviet Union, etc. But it seems that during the second half exports to these markets practically stopped. In 1991, beef exports are expected to decrease somewhat (or, at best remain stable) and prices for cooked meat and Hilton beef are expected to remain firm, while those for canned and frozen meat could fall.

	1989	Estimates 1990	% Change 1990/89	Forecast 1991	% Change 1991/90
Cattle and calf numbers: ^{1/}	49,500.0	49,000.0	-1.0	49,000.0	0.0
Beef and veal: ^{2/}					
Production	2,636.0	2,700.0 ^{3/}	-2.4	2,500.0	-7.4
Consumption	2,276.0	2,120.0	-6.9	2,050.0	-3.3
Exports	360.0	450.0	25.0	450.0	0.0

^{1/},000 head, 30 June

^{2/},000 tons

^{3/} Secretariat estimate

Brazil

Cattle and bovine meat industry again under the influence of economic turmoil

84. Estimated cattle and calf numbers in Brazil were up by 2 per cent last year to 139.6 million head. The economic instability in Brazil was partly responsible for the decline in the cattle herd growth rate from 3.5 per cent in the 1970s to the current 1.5 to 2 per cent. Last year, and like in 1986 and 1989, the Brazilian cattle industry was once more heavily affected by the general economic situation. Following his election, the Brazilian president introduced a new economic plan, the "New Brazil Plan" on 16 March 1990. The plan imposed an eighteen-month freeze on saving

accounts, introduced a new currency (the "Cruzeiro"), and thus sharply reduced the availability of money. In the same time, it imposed a price freeze, including meat prices.

85. The meat price freeze inhibited cattle commercialization in the first half of the year (the normal production period in Brazil). Producers retained cattle from slaughter and the value of replacement and breeding cattle increased. Subsequently, internal prices increased rendering exports less attractive and favouring imports and the consumption of poultry meat. In September 1990 slaughter cattle price had jumped to Cr\$3,000, from Cr\$500 in January. Only the importation of meat and the abundant offer of poultry meat, along with the deterioration of consumer's purchasing power, was able to force prices down again since then.

86. From January to September 1990 cattle slaughter decreased by 9 per cent, largely reflecting a 17 per cent fall in female cattle slaughter. Average weight was thus 4 per cent higher than year earlier and, as a result, beef and veal production remained at 2.1 million tons. Estimated production for the year as a whole is 2.85 million tons almost 4 per cent up from 1989. Despite declining incomes, beef and veal consumption is believed to have increased last year by around 4.5 per cent, to 18.7 kg. This seems to be due to higher spending of consumer savings.

87. The situation in the internal market had serious implications for Brazilian bovine meat exports. The uncertainties which preceded the March elections were at the basis of the relative absence of Brazil in the export market. Since the elections, and despite the liberalization of both imports and exports, the domestic supply/demand and price scenario described above was responsible for a similar absence: domestic prices were more attractive than those in the international market and Brazilian exports fell by almost 30 per cent. Furthermore, the Cruzeiro re-evaluated sharply with the implementation of the Plan, and, even if it declined again since then, it did not favour exports.

88. Thus, export contracts (under negotiation for more than a year and a half) for a total 40 thousand tons to Iran and Iraq were cancelled. And so were export contracts to Israel. However, rising herd retention by producers also meant higher availabilities meaning that, should conditions in the domestic market change and the value of the United States dollar become attractive (which is now the case), Brazil may be back on the market again. Current forecast for 1991 exports are for 460 thousand tons, the double of last year. Brazil will nevertheless have to solve the sanitary problems with which its sales of canned meat to the United States were also affected last year, if it wants to fulfil this target.

Policy developments

89. The government in place since March 1990 implemented profound economic and administrative reforms which, as indicated, had a major impact on the bovine meat sector. The reform was aimed, in priority, to control inflation (at 80 per cent/month in the beginning 1990). A very stringent monetary policy was put in place, which reduced currencies availability, froze financial assets, high interest rates and prices. Simultaneously,

the administration aimed at the limitation of government expending, limitation of its interference in production and trade, and deregulation of economic activities. Most trade barriers were dismantled and tariffs were sharply reduced while taxes and pre-existing trade controls were enacted.

	1989	Estimates 1990	%Change 1990/89	Forecast 1991	%Change 1991/90
Cattle and calf numbers ^{1/} :	136,814.0	139,550.0	2.0	142,000.0	1.8
Beef and veal ^{2/} :					
Production	2,748.0	2,850.0	3.7	3,000.0	5.3
Consumption	2,641.0	2,810.0	6.4	2,700.0	-3.9
Imports	192.0	190.0	-1.0	152.0	-20.0
Exports	323.0	230.0	-28.8	460.0	100.0
^{1/} ,000 head		^{2/} ,000 tons			

Uruguay

After two years of strong rebuilding, cattle herd down to lowest level in twenty years

90. After having experienced two years of strong herd rebuilding (1986 and 1987), cattle numbers in Uruguay fell sharply in both 1988 and 1989. The decline was primarily related to a long and serious drought in 1988-89, but also to strong internal, and especially, external demand. Thus, the cattle inventory fell from 10,331,000 head by June 1988 to an estimated 8,723 head by June 1990. That is to say that in two years, Uruguay's cattle herd declined by 1.6 million head. Current projections are for a further 1-2 per cent fall in 1991 (-125 thousand head), to the lowest level in the last twenty years.

91. And yet, the structure of cattle slaughter is still indicative of the beginning of herd rebuilding. Not only are slaughterings expected to be down in both 1990 and 1991 (by 15 and 16.5 per cent, respectively), but also the participation of female cattle in the slaughter mix is expected to fall from an abnormal and drought-induced level of almost 55 per cent in 1989, to 50 and 35 per cent last year and this year. Although last year female cattle slaughter remained at a much too high level, to allow for herd rebuilding, calf slaughter declined sharply, and a similar evolution is expected this year. Nevertheless, any change in current declining herd trends should not occur before 1992/93.

92. High cattle slaughter in 1988 and 1989 resulted in strongly increased production which in 1989 totalled 383 thousand tons, the highest level

since 1983. The return to improved weather conditions and the consequent decline in slaughterings last year lead to lower beef and veal production. However, as a result of early killings due to the drought, average slaughter weights in 1989 were particularly low (205 kg. compared to a "normal" 218-220 kg.). Last year improved pasture conditions and a larger percentage of adult male cattle in the slaughter mix offset the slaughter decline and estimated production fell by "only" 8 per cent. Lower slaughter will result in a further production drop this year, currently forecast at 13 per cent, to 306 thousand tons.

93. Despite 3-digit inflation, which almost doubled in 1989 compared to 1988, Uruguay's consumers of beef kept consumption at a relatively stable and high level: 63 kg. per capita (2 kg. less than in 1988). This was due to relatively stable real prices. Indeed, it appears that if it had not been for the strong export demand, the consumption of beef might have evolved in parallel with production, as is most often the case, and increase. Last year, however, per capita consumption fell by 9 per cent in response to lower production and increased exports and prices.

94. In 1990, beef and veal exports rose by some 4 thousand tons, despite a production drop of about 30 thousand tons. This was possible thanks to the consumption decline. Indeed, the production fall coincided with a moment of strong import demand. Undoubtedly, the difficult situation in Brazil was, for the second consecutive year, a real bonus for Uruguay, which not only benefited from Brazil's reduced presence in the export market, but also boosted sales of beef to the Brazilian market (49 thousand tons, during the first nine months of the year, against 32 thousand year earlier) at higher prices. The EC, Israel, and Egypt were its major markets last year and the average export value for deboned frozen meat during the first nine months was US\$1,810 per ton f.o.b., up by 4 per cent on year earlier.

95. With what seems to be an approaching herd rebuilding phase with lower slaughterings and reduced production, exports should continue to decrease. A 30 per cent decline is projected for 1991, when, at 126 thousand tons, beef exports should reach their second lowest level of the last 10 years.

	1989	Estimates 1990	%Change 1990/89	Forecast 1991	%Change 1991/90
Cattle and calf numbers ^{1/} :	9,446.0	8,723.0	-7.7	8,598.0	-1.4
Beef and veal ^{2/} :					
Production	383.0	353.0	-7.8	306.0	-13.3
Consumption	200.0	184.0	-8.0	180.0	-2.2
Exports	177.0	181.0	2.3	126.0	-30.4

^{1/},000 head, 30 June

^{2/},000 tons

United States

Cattle herd rebuilds slowly, as fewer cattle produce more beef

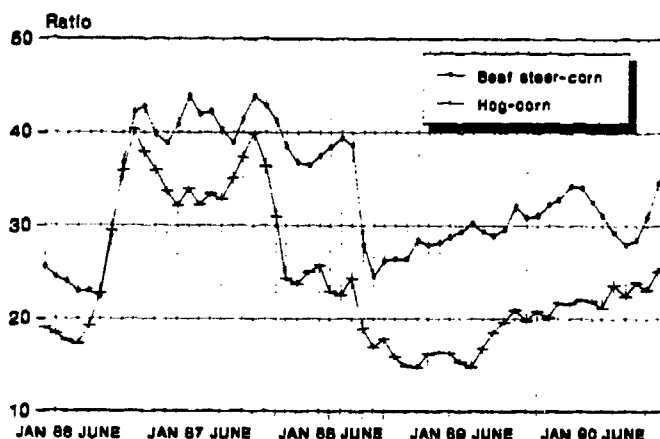
96. The 1 July 1990 cattle inventory, showed once more that the cattle herd in the United States is rising at a very slow pace. Total cattle numbers were, at 108.9 million head, only 0.2 per cent above year earlier. With slaughter cattle prices rising since mid-1986, this evolution seems somewhat surprising.

However, it can be explained by two major reasons.

Firstly, producers seem to have initially preferred to pay off debts and improve their financial basis after years of depressed prices; secondly, today they can produce more meat with less cattle, due to increased yields and improved efficiency. During the first three quarters of 1990, fed-cattle prices remained good. Thus, feeder cattle and calf prices were firm and continued to increase.

Steers on feed and beef heifers retention was higher than year earlier pointing to the continuation of herd rebuilding and showing that despite improved yields and efficiency, strong prices are still the incentive for herd expansion. Current estimates are for a 1.9 per cent rise in cattle numbers in January 1991.

U.S. - LIVESTOCK/FEED PRICE RATIOS
(Omaha)



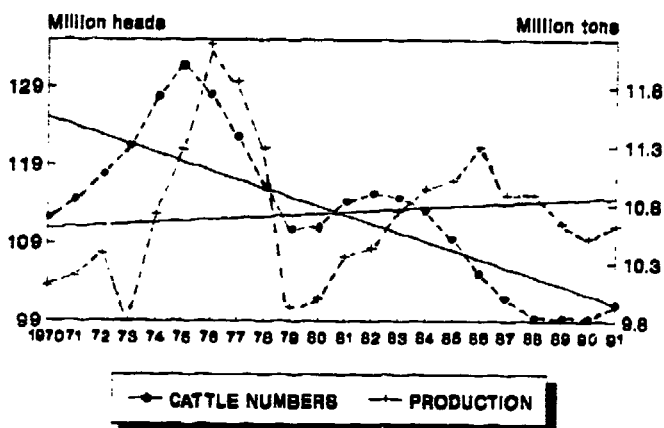
97. Although rising slightly, feeder cattle supply has remained tight last year due to reduced calf crops. Non-fed steers and heifer slaughter declined significantly and estimated calf slaughter fell by more than 17 per cent (commercial cattle slaughter was the lowest one in many years). Calf numbers on feed increased significantly. During the first half of 1990, feedlot placements and fed cattle marketings ran 1 per cent below year earlier. However, during the summer, placements increased (+6 per cent last August) and marketings continued to decline (-2 per cent in August) On 10 October cattle on feed was up by 10 per cent from year earlier.

98. In 1990, estimated beef and veal production fell by 1 per cent, to 10.5 million tons. The fall reflects a 9 per cent drop in veal production due to the sharp decline in calf slaughter. Beef production decreased by "only" 0.5 per cent (50 thousand tons) also because of lower adult cattle slaughter. However, fed cattle represented about 80 per cent of total cattle cull and dressed slaughter weights partly offset the slaughter decrease. In 1991, tight cattle supply and herd rebuilding should result in relatively unchanged slaughter levels and a 1 per cent production rise.

99. As indicated, during the first three quarters of 1990, fed cattle prices remained firm. By the end of September prices approached a record US\$80 per cwt. With such prices and tight supplies of feeder cattle, non-fed cattle prices were also up. They averaged US\$5-10 per cwt higher than year earlier. Lower cow slaughter also led prices to average US\$ 1-3 per cwt higher. Cattle prices were expected to level off somewhat in the last quarter, but to remain close to record levels in 1991, especially during the first half of the year. This forecast assumes continuing tight cow and feeder cattle supplies and increased heifer retention. However, the economic slowdown and possible fall in consumer demand, the possible increased production costs due to higher oil prices (and despite prospects for cheaper feedstuffs) and close to record total meat supplies, are factors of uncertainty.

100. Estimated bovine meat consumption decreased by close to 1.8 per cent per capita, to 44.2 kg. Slower economic growth, a continuously growing production of cheaper poultrymeat (whose estimated per capita consumption rose by 6 per cent, to 41.2 kg.) and increased retail beef prices are the main reasons for the erosion of beef and veal intake. Economic prospects for 1991 and continuing large availabilities of all meats do not leave much room for an improved performance this year, despite current efforts for less bone and fat products.

UNITED STATES INDUSTRY TRENDS



101. Lower supplies of feeder cattle boosted imports of live cattle last year which, at an estimated 1.8 million head, +23 per cent, reached a record level. Mexico remained the major supplier with exports to the United States expected to surpass 1 million head (+21 per cent) and benefiting from declining export taxes. Imports from Canada increased more rapidly (+30 per cent) and could total 740 thousand head, reflecting attractive cattle prices in the United States and despite a strengthening Canadian dollar against the American currency. Estimated exports of live cattle fell from 35 thousand head last year to 76 thousand in 1990. As is traditionally the case, the major suppliers, Mexico and Canada, were also the major buyers. However, this year Canada bought more cattle from the United States than from Mexico. Both live cattle imports and exports could decline in 1991.

102. Contrary to earlier downward estimates, estimated beef and veal imports showed a 3.4 per cent rise, to above 1 million tons. The rise was due to increased beef supplies from Australia, reflecting high cattle

slaughter there, attractive import prices in the United States and a slowdown in Japanese imports. The rise in imports from Australia more than offset a 10 per cent decline in imports from New Zealand. This country is going through a cattle herd rebuilding phase, which reduces export availabilities. Estimated beef and veal exports showed a 2.6 per cent growth by the year end, to 476 thousand tons. The rise was due to increased beef exports to certain countries, such as Korea, but especially to Canada which, estimated at more than 60 thousand tons, represented double the 1989 total and a record level in the last few years. The increase more than offset a 30 per cent drop in exports to Japan, to 188 thousand tons. The decline was due to accumulating stocks in Japan, reflecting slower than expected decreases in market prices there. However, it did not prevent the United States, with a 44.6 per cent share, from equalling, for the first time, the Australian share of the Japanese market. Total United States exports are expected to rise above 500 thousand tons this year.

	1989	Estimates 1990	% Change 1990/89	Forecast 1991	% Change 1991/90
Cattle and calf numbers: ^{1/}	99,180.0	99,337.0	0.2	101,238.0	1.9
Beef and veal: ^{2/}					
Production	10,633.0	10,512.0	-1.1	10,621.0	1.0
Consumption	11,196.0	11,092.0	-0.9	11,177.0	0.8
Imports	987.0	1,021.0	3.4	998.0	-2.3
Exports	464.0	476.0	2.6	508.0	6.7

^{1/},000 head, 1 January

^{2/},000 tons

Canada

Herd rebuilding continues, and cattle exports to the United States grow sharply

103. Cattle herd rebuilding initiated in 1988 continued last year. The last 1 July inventory showed a 1 per cent rise in numbers. The general evolution reported by the July cattle census was expected to continue for the rest of the year. Beef cow numbers should show a 3 per cent increase, while dairy cow numbers should fall by 2 per cent. Current estimates for the January 1991 census are for a 1 per cent increase, compared to year earlier, to close to 11.4 million head.

104. Regarding slaughter cattle, different trends were reported⁵ during the first half 1990 in Eastern and Western Canada. Beef heifer and steer inventories were down by 3 per cent and 1 per cent respectively in Eastern Canada, while they remained unchanged in Western Canada. Slaughter cattle marketings were down by 15 per cent in the East, reflecting lower inventories and a decline in West-East feeder cattle movements. In the West, slaughter cattle marketings were up by 8 per cent due to increasing numbers of beef cattle in the region.

105. During the same period, total cattle slaughter decreased by 5.7 per cent, due to lower cull of all categories of cattle and in particular female cattle (-8.5 per cent) and calves (-9.3 per cent). This declining trend levelled off somewhat in the second half of the year and, by the year end, estimated total slaughter was 4 per cent below 1989. Low female cattle and calf slaughter was supportive of continuing herd rebuilding and reflected attractive producer returns.

106. Canadian cattle prices in 1990 averaged above year earlier. Although A1, A2 steers in Toronto increased only marginally (+0.1 per cent), D3 cow prices were 8.4 per cent higher. Even if the stronger Canadian slaughter cattle prices reflect the sharp increases in the United States slaughter cattle market, price evolution also differed somewhat between Western and Eastern Canada, due to a relatively weak demand for fed cattle in Ontario.

107. However, cattle prices in Canada were affected by a strong Canadian dollar compared to the United States dollar. Feeder cattle prices remained strong in 1990. Contributing to the strong feeder cattle prices was a sharp rise in live cattle exports to the United States (+111 per cent from June to July). In the East, feeder cattle prices were negatively affected by higher feedgrain costs in this region which added to the weak demand for fed cattle. As the result of the sharp increase of feeder cattle exports, total cattle marketings should decline by 1 per cent this year. This is despite expanding inventories. Expectations are for continuing significant cattle exports to the United States. Lower North American beef supplies and steady demand conditions which are expected to result in relatively attractive prices in the United States, are good premises for sustained cattle prices in Canada next year.

108. Lower cattle slaughter last year is estimated to have resulted in an output decrease. However, higher slaughter weights compensated for part of the decline and estimated production fell by only 2.6 per cent, to 954 thousand tons. Current projections put this year's output up by 1 per cent, but this is subject to a number of imponderables and in particular live cattle exports to the United States. Beef and veal consumption last year averaged 38.8 kg. per capita, 1.3 per cent below year earlier and should fall by a further 1 per cent in 1991.

⁵Market Commentary, Agriculture Canada, September 1990

109. Imports of bovine meat increased by 19 per cent from January to June 1990, to 96.2 thousand tons. Frozen boneless beef accounted for 58 per cent of the total and was imported at the average import price of US\$ 2,585 per ton c.i.f. The major suppliers continued to be Australia (47.5 per cent market share) and New Zealand (30 per cent). Australia, which doubled its exports to Canada, benefited from low availabilities in New Zealand where exports to this market fell by 20 per cent. The United States, virtually sole supplier of fresh and chilled beef, also increased its sales by 43 per cent. For the year as a whole, estimated imports were up by 9-15 per cent.

110. As indicated, during the first six months of 1990 live cattle exports rose sharply (111 per cent, to 352 thousand head) and went entirely to the United States. By the year end they should have totalled 400 thousand head (+21.6 per cent) and decline to 350 thousand head this year. Beef and veal exports increased by 3 per cent, to 52.2 thousand tons, during the first half of 1990. The rise was by and large due to a 7 per cent increase in sales of fresh meat to the United States. Exports to Japan fell by 36 per cent, to a mere 1.7 thousand tons. Average export price for frozen boneless beef was US\$ 2,182 per ton f.o.b. Year-end beef and veal exports are currently estimated at 98 thousand tons, 8 per cent below 1989. However, 1989 data are subject to revision and exports (as well as imports) last year may well end up having been higher than in 1989. In 1991, exports are expected to reach 105 thousand tons.

	1989	Estimates 1990	% Change 1990/89	Forecast 1991	% Change 1991/90
Cattle and calf numbers: ^{1/}	11,016.1	11,200.6 ^{3/}	1.7	11,366.0	1.5
Beef and veal: ^{2/}					
Production	979.6	954.0	-2.6	960.0	0.6
Consumption	1,031.2	1,029.0	-0.2	1,025.0	-0.4
Imports	158.3	173.0	9.3	170.0	-1.7
Exports	106.5	98.0	-8.0	105.0	7.1
	^{1/} ,000 head, 1 January	^{2/} ,000 tons		^{3/} Actual	

Australia

Strong cattle slaughter boosts exports to North America

111. According to the March 1990 census, at 24.2 million head (+1 per cent), cattle herd expanded much more slowly than earlier anticipated. This was due to a 3 and 2.4 per cent drop in dairy cattle and steer numbers, respectively. Beef cattle numbers were up by 1.7 per cent.

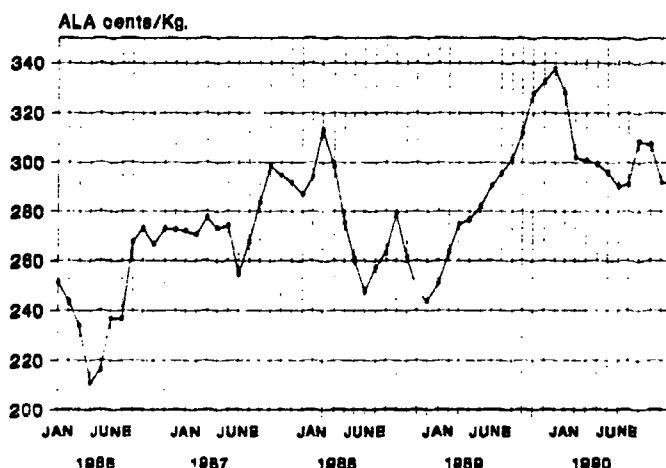
112. In the last quarter of 1989, cattle slaughter began to increase reflecting dry conditions. These conditions continued through the first months of last year and, by the end of June, slaughter was up by 14 per cent, compared to year earlier. Female cattle cull was 19 per cent higher and its percentage of total slaughter moved from 35 per cent in January-June 1989 to 37 per cent last year. Total year end slaughter was estimated to be 9 per cent higher than in 1989, and remain at similar levels in the current year.

113. Despite this evolution, herd rebuilding should continue to expand, albeit at a slower rate than in previous years. If this is the case, the average growth of the cattle herd, +1.5 per cent/year until last year in this cycle, remained far behind previous cattle cycles (6.5 per cent in the last cycle). This would mean that Australian cattle numbers will remain well below the record levels reached in the mid-seventies. This would also imply that any significant production growth in the next few years would result from improved productivity.

114. Between January and June 1990, beef and veal production increased by almost 15 per cent, along with cattle slaughter. The estimated year end increase was of about 8 per cent, to 1.7 million tons.

Lower slaughter weights should result in a slight decline this year. Compared to year earlier, producer prices increased by 2.8 per cent during the first half of the year. This limited rise seems due to lower export prices of certain types of meat than year earlier and reflects the increasing value of the Australian dollar since the second quarter. (The AMLC publishes monthly export prices of boneless cow 90 CL to the United States which show that, although they fell from January to June 1990, these prices still averaged 11 per cent higher than year earlier. After increasing seasonally again in July and August, export prices to the United States declined again since then but still remained from January to November, 3 per cent above year earlier.)

AUSTRALIAN EXPORT PRICE TO USA (Boneless cow, fas)



115. The increase in beef and veal production from January to June last year seems to have all gone to the export market. While consumption fell by close to 4 per cent (-5.5 per cent per capita), exports were up by 34 per cent. Consumption has been diverted to cheaper sheepmeat (+19 per cent) and pigmeat (+16.4 per cent), while poultrymeat consumption was also down by 22.5 per cent. The increase in exports was due to a 62 per cent rise in sales to the United States, Korea (+8 per cent) and Canada (+79 per cent). During this period, exports to Japan remained relatively stable (all qualities included) due to some market adjustment difficulties there, following liberalization. However, Australian sales to this market seem to have increased significantly afterwards (unofficial data show a 13.6 per cent rise for the year as a whole) and indeed, the rise would be related to significantly increased quantities of chilled and grain-fed beef. Frozen beef sales declined.

116. Reasons for increased exports to the United States (and to some extent to Canada) were the unexpectedly high level of Australian cattle slaughter and continuing attractive (albeit declining) import prices in the American market. The AMLC seems confident in relation to the short-term evolution of Australian exports to the United States. However, in the longer term, the risk of an economic recession there, the competition of poultry meat in the American market and the imponderables of the events in the Middle East are seen as factors causing serious uncertainty. Exports to Korea are rising in response to the market liberalization measures introduced there. Unless there was a major decline in the final months, the evolution of the first seven months of 1990 suggests that a 10 per cent increase in total exports occurred last year. Reflecting the production decrease, exports should decline in 1991.

	1989	Estimates 1990	% Change 1990/89	Forecast 1991	% Change 1991/90
Cattle and calf numbers: ^{1/}	23,953.0	24,159.0	0.9	24,300.0	0.6
Beef and veal: ^{2/}					
Production	1,565.0	1,695.0	8.3	1,690.0	-0.3
Consumption	700.2	660.0	-5.7	685.0	3.8
Exports	872.0	1,050.0	20.4	990.0	-5.7

^{1/},000 head, 31 March

^{2/},000 tons

New Zealand

Improved seasonal conditions and higher prices favour herd rebuilding

117. Estimated cattle numbers by June 1990 were, at 8.1 million head, up by 3.1 per cent from year earlier. Dairy cows increased by 2.1 per cent and beef cows by 2.6 per cent. The rise was related to improved seasonal conditions after two years of severe drought, a relatively favourable dairy market outlook in 1989 and higher returns for beef. The result was significantly lower cattle slaughter in 1989 (-7 per cent) as well as in 1990, when total slaughter fell by about 11 per cent to close to 2.7 million head. In the meantime, farmers have also retained higher numbers of dairy calves for beef production.

118. Improved seasonal conditions resulted in more plentiful feed supplies supportive of longer feeding periods and higher slaughter weights (+2.6 per cent). This year cattle slaughter is seen to rise significantly in response to expected price levelling-off and as slaughterings adjust to a more normal level of offtake, albeit allowing for some herd rebuilding. Cattle numbers should consequently stabilize, but current projections are for a moderate herd rebuilding phase to continue over the next few years. However, last year's downturn in dairy and wool prices render all forecasts rather uncertain.

119. In 1990 lower cattle slaughter and the return to cattle herd rebuilding were partly compensated by increased weights. Thus, year end estimated production fell by only 4.4 per cent, to 495.5 thousand tons. The average price received by producers increased by about 14 per cent during the first three quarters of the year. However, producer prices seem to have levelled off since then and the year-end average increase would be below 10 per cent. As indicated, current estimates are for the continuation of lower prices this year and a possible stabilization afterwards. A return to more normal rates of slaughter and associated higher cattle slaughter along with higher dairy cattle finishing for beef production, will lead to increased production in 1991. Next year, production could fall again by some 10 thousand tons.

120. Bovine meat consumption, which in 1989 fell by 15 per cent due to sharply increased retail prices, fell again last year. The fall, -2 per cent, to 33.4 kg. per capita, reflects an approximate 10 per cent retail price rise. Increased production this year is expected to result in larger availabilities both for the export and domestic markets. Retail prices should consequently decrease somewhat and consumption could rise to close to 35 kg. per capita, in 1991 and stabilize at that level in 1992.

121. Estimated beef and veal exports fell again in 1990 for the second consecutive year because of the return to cattle herd rebuilding. The drop should be some 13 per cent to 380 thousand tons, reflecting a fall to all major markets. During the first three quarters of the year, exports to the United States fell by 13 per cent, to 155.8 thousand tons, product weight. However, the average export value to the United States, US\$2,459 per ton f.o.b., increased by about 9 per cent. Exports to Canada declined by less than 1 thousand tons, but sales to Japan declined by as much as 10 thousand tons. Export average price (to all markets) during this period increased

by 6 per cent. However, in the last quarter export prices to the United States declined. The decline in exports to Japan comes somewhat as a surprise. New Zealand, with exports of grass-fed beef to countries such as the United States and Canada, was expected to see its sales to Japan grow steadily following improved market access. The decline, primarily due to the New Zealand production fall, is also related to the fact that New Zealand grain fed beef production, the type of beef exported to Japan, seems not to have developed as did, for instance, the Australian product. Furthermore, the decline also reflects the uncertainty of the Japanese market associated with the liberalization and the build-up in stocks of imported beef in Japan. It can be expected that New Zealand sales to Japan (and possibly also Korea) will recover as from this year when total bovine meat exports are projected to increase along with production and stabilize in 1992.

	1989	Estimates 1990	% Change 1990/89	Forecast 1991	% Change 1991/90
Cattle and calf numbers: ^{1/}	7,828.4	8,073.0	3.1	8,050.0	-0.3
Beef and veal: ^{2/}					
Production	518.4	495.5	-4.4	544.5	9.9
Consumption	119.0	112.4	-5.5	117.5	4.5
Exports	436.4	380.0	-12.9	415.0	9.2
	^{1/} ,000 head, 30 June	^{2/} ,000 tons, calendar year			

Japan

Beef retail prices increase, despite a significant drop of wholesale prices

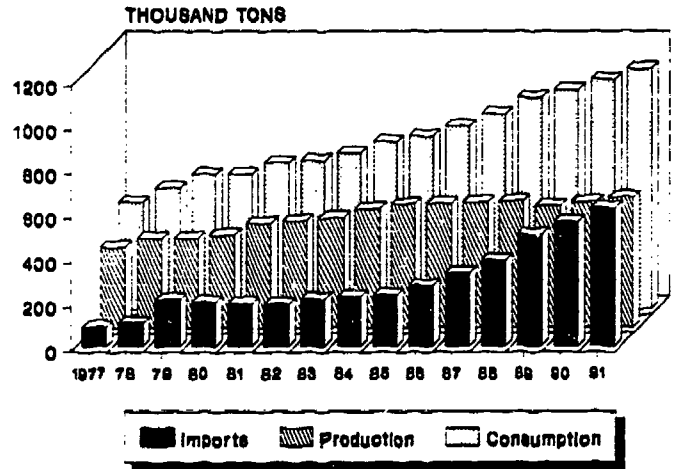
122. Estimated cattle numbers in Japan approached 4.8 million head by February 1990, a close to 2 per cent rise on year earlier. Beef cattle totalled 2.7 million head. Although the number of households has diminished through the years, the number of beef cattle raised per farm, in particular cattle for fattening, has increased steadily to reach an average of 11.6 head this year. The rise in cattle numbers in 1989 was due to two major factors: falling cattle slaughter in response to rising producer prices and increased retention of dairy cows because of a strong demand for milk products.

123. In the second quarter of 1990, cattle prices fell by almost 5 per cent compared to year earlier, but cattle slaughter continued to decrease. The price fall seems partly due to increased stock levels, which reached 153 thousand tons by the end of June. Stockpiling was due to the rapid expansion of imports which exceeded consumption growth. After the peak reached in September 1989 (168 thousand tons) beef and veal stocks have not fallen below 150 thousand tons.

124. In Fiscal Year (April-March) 1989, consumption of imported beef had increased by 15 per cent. The Japanese authorities estimated that should this consumption growth continue in Fiscal Years 1990 and 1991, stock levels of frozen beef would not increase significantly.

However, more recently estimated data show that per capita consumption reached only 4 kg. during the first six months of 1990, against 3.8 kg. year earlier. This slow rise when real disposable incomes grew on average by 9 per cent, seems due to increased retail prices (+6 per cent) despite falling cattle and wholesale prices (manufacturing grade -12 per cent, table grade -1 per cent). The Japanese authorities believe that the Japanese consumers now prefer high quality beef and a leaner one, which would explain the relative stability of retail prices. Technical reasons would also limit the possibility of retail prices to reflect wholesale prices.

JAPAN - BEEF INDUSTRY



125. Beef and veal production (-3.8 per cent) fell along with slaughter during the first half of 1990. However, declining trends for cattle prices suggested that cattle cull may have increased in the last half of the year. The secretariat consequently estimates production to reach close to 590 thousand tons by the year end. In recently published data, the OECD sees Japanese beef and veal output rising steadily in the next five years, reaching some 669 thousand tons by 1995.

126. From January to June 1990, beef and veal imports totalled 245 thousand tons, only 2 per cent more than year earlier (when, following the implementation of liberalization measures, imports had increased by almost 45 per cent). Major suppliers were of course Australia and the United States. However, according to the official Japanese data, it seems that with a 44.6 per cent market share (including canned product), the United States equalized Australia (44.4 per cent).

127. Following the 1988 liberalization measures, the beef import quota for the Japanese Fiscal Year 1990 ought to increase to 354 thousand tons, product weight. At the end of this Fiscal Year, that is, by April 1991, the import allocation system will be terminated. In Fiscal Year 1991 it will be replaced by a 70 per cent ad-valorem tariff.

	1989	Estimates 1990	% Change 1990/89	Forecast 1991	% Change 1991/90
Cattle and calf numbers: ^{1/}	4,682.0	4,760.0 ^{3/}	1.7	4,890.0 ^{3/}	2.5
Beef and veal: ^{2/}					
Production	548.0	567.0 ^{4/}	3.5	586.0 ^{4/}	3.4
Consumption	994.0	1,039.0 ^{4/}	4.5	1,087.0 ^{4/}	4.6
Imports	502.0	562.0 ^{4/}	12.0	622.0 ^{4/}	10.7
^{1/} ,000 head, 1 February		^{2/} ,000 tons		^{3/} USDA estimate	
^{4/} Secretariat estimates					

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

Soviet Union

Disruption of distribution system and development of local markets

128. According to the USDA, estimated cattle and calf numbers in the Soviet Union have decreased by at least 1 per cent last year, to 118.3 million head. According to the Economic Commission for Europe/FAO estimates, the decline in collective farms (about 80 per cent of the total) was even stronger (-2 to 3 per cent). The production rise which occurred in 1989 was due to some productivity improvements and consistent feed imports, but was also related to the cattle herd reduction. This decline in livestock numbers (which included also reduced numbers of pigs, sheep and poultry), is weakening the production base for the nineties. Last year, from January to September, the state meat plants output fell by 4 per cent. Beef and veal production for the year as a whole may have declined by at least 100 thousand tons.

129. The decline in output does not however seem to have been the sole responsible for the heavily deteriorated meat supply situation in major urban areas in the Soviet Union last year. A disruption of the national distribution system played a major role in the food shortages in those areas. In the meantime, and according to the ECE/FAO, local and regional markets developed, and a real demand for meat exists. This meant less livestock for state procurement which declined, and consequently lower availabilities to the state meat industry. Furthermore, the supply of energy, machine parts and industrial consumer goods to rural areas also deteriorated and a number of collective and small scale farms have switched from direct sales for roubles, to barter trade deals. In summary, the disruption of the union-wide market broke down into regional markets. The result was the deteriorated situation in major urban and industrial areas.

130. This situation boosted meat imports dramatically last year. From January to September overall meat imports grew by 71 per cent (the USDA estimates beef and veal imports to have risen by 67 per cent to some 250 thousand tons). As was the case in 1989, imports have increasingly been diverted from the central and eastern European countries to western suppliers. Taking into account the development of local and regional markets, and should it continue, meat import requirements could remain high in the short run. Overall meat production is seen by the ECE/FAO as to fall by some 3 per cent in 1991 and 1992, due not only to reduced herds but also to lower feed supplies.

	1989	Estimates 1990	% Change 1990/89	Forecast 1991	% Change 1991/90
Cattle and calf numbers: ^{1/}	119,580.0	118,300.0	-1.1	117,500.0	-0.7
Beef and veal: ^{2/}					
Production	8,800.0	8,700.0	1.1	8,700.0	0.0
Consumption	8,945.0	8,945.0	0.0	8,895.0	-0.6
Imports	150.0	250.0	66.7	250.0 ^{3/}	0.0
^{1/} ,000 head		^{2/} ,000 tcns		^{3/} Secretariat estimate	

Source: USDA, World Livestock Situation, FL&P 4-90, October 1990

South Korea

131. As indicated in "The International Markets for Meat, 1989/90", on 7 November 1989, the GATT adopted three panel reports which recommended that "Korea eliminate or otherwise bring into conformity with the provisions of the General Agreement the import measures on beef introduced in 1984/85 and amended in 1988 (...)". Korea subsequently agreed to an annual access growth factor during an initial transitional period (50 thousand tons in 1990, 62 thousand tons in 1991 and 66 thousand tons in 1992) and higher amounts afterwards, depending on further negotiations.

132. Reportedly, and following significant income growth, beef consumption last year grew steadily (+10 per cent, according to the USDA, 10-20 per cent according to other sources), and beef imports are reported at 80-90 thousand tons. The consumption growth, and consequent higher imports, seem also related with a general consumer's preference for beef compared to other meats, and a growing practice of "eating-out". In the meantime, beef and veal production may have declined last year. If the current trend of consumption continues in the near future, it appears that import levels could continue to largely exceed the above agreed import quotas.

	1989	Estimates 1990	% Change 1990/89	Forecast 1991	% Change 1991/90
Cattle and calf numbers: ^{1/}	2,039.0	2,051.0	0.7	2,088.0	1.8
Beef and veal: ^{2/}					
Production	124.0	115.0	-7.3	118.0	2.6
Consumption	198.0	218.0	10.1	120.0	14.3
Imports	83.0	105.0	26.5	120.0	14.3
	^{1/} ,000 head, 1 February			^{2/} ,000 tons	

Source: USDA, World Livestock Situation, FL&P 4-90, October 1990

V. SITUATION AND OUTLOOK IN THE INTERNATIONAL PIGMEAT, POULTRY MEAT AND SHEEPMEAT SECTORS

The pigmeat sector

133. Countries participating in the Arrangement Regarding Bovine Meat represent about 45-50 per cent of the world pigmeat production. The two major producing countries not signatories to the Arrangement are China, which ranks as first leading producer (more than 30 per cent of world production) and the USSR (about 10 per cent). At 30 million tons, estimated production in member countries last year showed little change from 1989. In China production was estimated to increase by 1 per cent, despite lower pig numbers due to increased slaughtering in 1989.

134. In the European Community the pig herd expanded in response to increased prices in 1989 and during the first half of 1990 (last July prices averaged 30 per cent higher than year earlier) and lower feed costs. However, prices have declined steadily since August partly because of large domestic supplies, but also because of large imports from former East Germany and in one case (Belgium) due to the outbreak of swine fever. Declining prices and increased sow numbers could result in higher slaughtering and production this year.

135. In the United States, the third major world producing country, increased prices and generally favourable returns to hog producers led to some expansion of breeding herds, despite somewhat higher corn prices. Pigmeat production last year is seen at 3.3 per cent below that in 1989 and the lowest level since 1987. In 1991 an increased pig crop should result in a production recovery. In Canada estimated pigmeat output fell by approximately 4 per cent and should decline further this year following the cyclical trend. Prices strengthened in line with prices in the United States, but the countervailing duties imposed by the United States on pigmeat imports from Canada continue to be a major cause for uncertainty in the Canadian market. Last September a GATT panel on this issue concluded that "...the United States countervailing duties on fresh, chilled and frozen pork from Canada are being levied inconsistently with Article VI:3 of the General Agreement...".

136. In Japan, as expected, production was up by only 0.6 per cent, as the pigmeat sector was affected by rising feed costs, falls in prices and competing imports. In Poland, where increased pig slaughtering in the last quarter 1989 had allowed for some production rise last year, breeding sow figures increased and resulted in a higher piglet population. Pigmeat production, earlier expected to decline, seems to have remained stable in response to high domestic prices. This year production is expected to rise due to increased pig numbers.

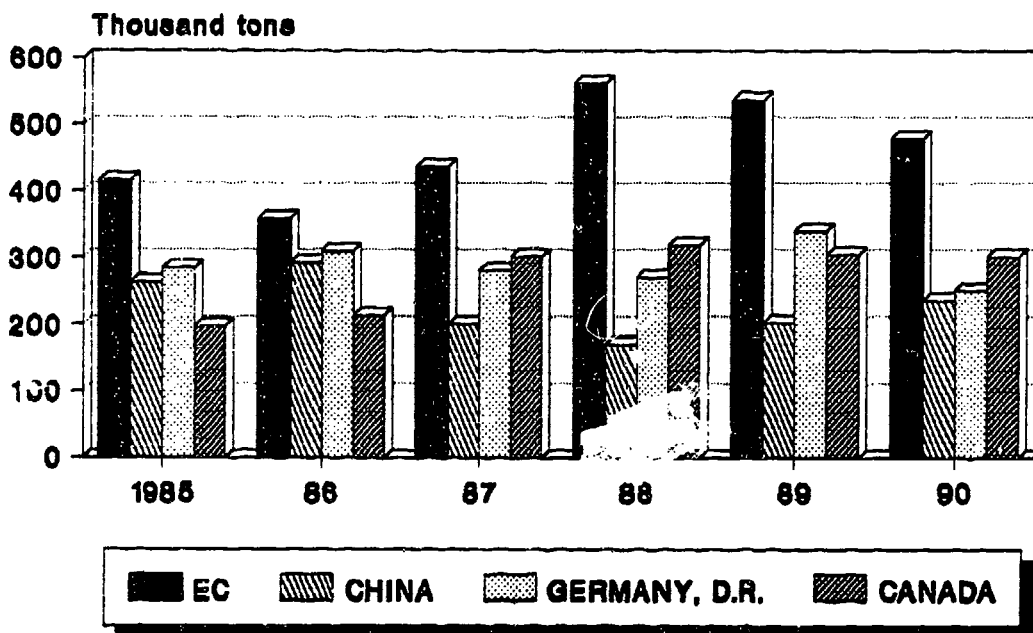
137. Estimated pigmeat consumption in 1990 in the countries members of the Arrangement totalled 29.2 million tons, a decrease of 0.5 per cent on year earlier. However, with the exception of the United States and Canada, it was up in all major consumer countries. In Japan, demand continued to rise as did imports. In Central and Eastern Europe, consumption is estimated to

have fallen at least in Hungary due to reduced incomes and to the continuation of moves towards cheaper poultry meat which have occurred in the last few years.

138. In 1990, and after years of uninterrupted growth, pigmeat exports of participating countries, estimated at 1.45 million tons (-2.2 per cent), fell for the second consecutive year. The fall was primarily due to reduced exports of the EC, but reflects also lower exports by Sweden, Poland, the United States and Canada. The export decline in the EC was related to the herd expansion and the attractive internal prices during the first half of the year. Due to the depreciation of both the United States dollar and the yen, lower export returns seem to have affected Danish sales to the United States and Japan, despite significantly increased export refunds (Danish exports to Japan in the first quarter of the year ran to almost 60 per cent above year earlier, but fell sharply afterwards and by the mid-1990, they were at the same level than in 1989).

139. The Canadian exports decline reflected lower supplies and higher domestic prices. This country's sales to the United States were down, reflecting the effects of the countervailing duties. Canada is diversifying its export markets and sales to all other countries, including Mexico, were up. Chinese exports were estimated to increase, reflecting this country's efforts to earn more hard foreign currency. However, larger sales of Chinese pigmeat are also dependent on barter deals with the USSR. Former East Germany, the third world exporter of pigmeat, was expected to be faced with a 200 thousand ton oversupply situation. Part of the problem would have been solved by pigmeat sales to the USSR (100 thousand tons) and 800 thousand pigs to other countries. Reportedly, these sales benefited from high EC export refunds.

PIGMEAT EXPORTS SELECTED COUNTRIES



PIGMEAT SITUATION IN SELECTED COUNTRIES^{1/}

PRODUCTION

	1989	Estimates 1990	%Change 1990/89	Forecast 1991	%Change 1991/90
CHINA ^{2/}	21,375.0	21,600.0	1.1	22,000.0	1.9
EC	13,044.0	13,103.0	0.5	13,300.0 (14,500.0) ^{3/}	1.5
UNITED STATES	7,173.0	6,935.4	-3.3	7,089.9	2.2
USSR ^{2/}	6,700.0	6,800.0	1.5	6,800.0	0.0
JAPAN	1,596.0	1,606.0	0.6	1,625.0 ^{4/}	1.2

CONSUMPTION

	1989	Estimates 1990	%Change 1990/89	Forecast 1991	%Change 1991/90
CHINA ^{2/}	21,172.0	21,365.0	0.9	21,750.0 (21,750.0) ^{3/}	1.8
EC	12,665.0	12,736.0	0.6	12,950.0	1.7
UNITED STATES	7,647.0	7,302.0	-4.5	7,645.0	4.7
USSR ^{2/}	6,915.0	6,075.0	2.3	7,095.0	0.3
JAPAN	2,076.0	2,115.0	1.9	2,000.0	-5.4

EXPORTS

	1989	Estimates 1990	%Change 1990/89	Forecast 1991	%Change 1991/90
EC	537.0	478.0	-11.0	500.0	4.6
GERMANY, D.R. ^{2/}	340.0	250.0	-26.5	300.0	20.0
CANADA	304.1	301.8	-0.8	309.3	2.5
CHINA ^{2/}	203.0	235.0	15.8	250.0	6.4
TAIWAN ^{2/}	160.0	190.0	18.8	180.0	-5.3

IMPORTS

	1989	Estimates 1990	%Change 1990/89	Forecast 1991	%Change 1991/90
UNITED STATES	406.0	414.0	2.0	442.0	6.8
JAPAN	492.0	535.0	8.7	580.0	8.4
USSR ^{2/}	220.0	280.0	27.3	300.0	7.1
HONG KONG ^{2/}	217.0	220.0	1.4	220.0	0.0
EC	120.0	111.0	-7.5	90.0	-18.9

^{1/} 1,000 tons carcass weight, includes fresh, frozen and canned product but excludes live animals.

^{2/} Source: USDA, World Livestock Situation, FL&P 4-90, October 1990 .

^{3/} Including the new German Federal States.

^{4/} Secretariat estimates.

The poultry meat sector

140. In 1990, estimated poultry meat production in countries participating in the Arrangement Regarding Bovine Meat reached 25.4 million tons, a 4.7 per cent rise compared to 1989. The USDA estimated a 4 per cent rise in world production last year, to 35.7 million tons, followed by another 4.6 per cent increase in 1991. Among participating countries estimated poultry meat output in 1990 fell only in Egypt, New Zealand, Poland and Yugoslavia. In all other countries it increased or remained unchanged. The estimated world production rise reflects a particularly higher output in the five major producing countries: United States, European Community, USSR, Brazil and Japan.

141. In the United States, which account for a third of world production, the growth was due to an output rise of both turkey (+9 per cent) and broiler (+6 per cent). As a result of such increases in supply, prices last year averaged somewhat lower than in 1989. In the EC, poultry meat production growth was more moderate (although it increased by a non negligible 3.0 per cent), due to the limited expansion of domestic consumption but probably also, as in 1989, to the limited new marketing opportunities. Taking into account disturbed feeding and marketing conditions, as well as lower poultry numbers, a reported 3 per cent output rise in the USSR last year, seems over estimated and production seems indeed to have decreased. However, the poultry meat sector remains the most dynamic one of the meat economy in this country and production could indeed show some rise in 1991.

142. In Brazil, last year's output growth appears related to increased domestic demand and higher exports. In Japan production fell slightly during the first half of the year. Although increased domestic demand should have acted as a production incentive for the rest of the year, higher imports reflecting the April 1989 tariff cuts for most chicken meat, may have limited the output rise. In the Middle East the rise in oil prices might have, as in the past, a positive impact on poultry meat production. However, the present cause for the oil price increase, the Iraq/Kuwait crisis, is also the cause for major uncertainties. In Saudi Arabia production should have grown, while in Egypt, where the poultry industry is estimated to operate at about 50 per cent of its capacity, it may at best have stabilized.

143. In 1990, estimated poultry meat consumption in member countries was, at 24.2 million tons, up by 4.5 per cent compared to 1989. Despite repeated assumptions that per capita consumption may have reached a saturation point in many countries (and especially developed countries), the only countries where a decrease was registered last year were Egypt, Poland and possibly Yugoslavia.

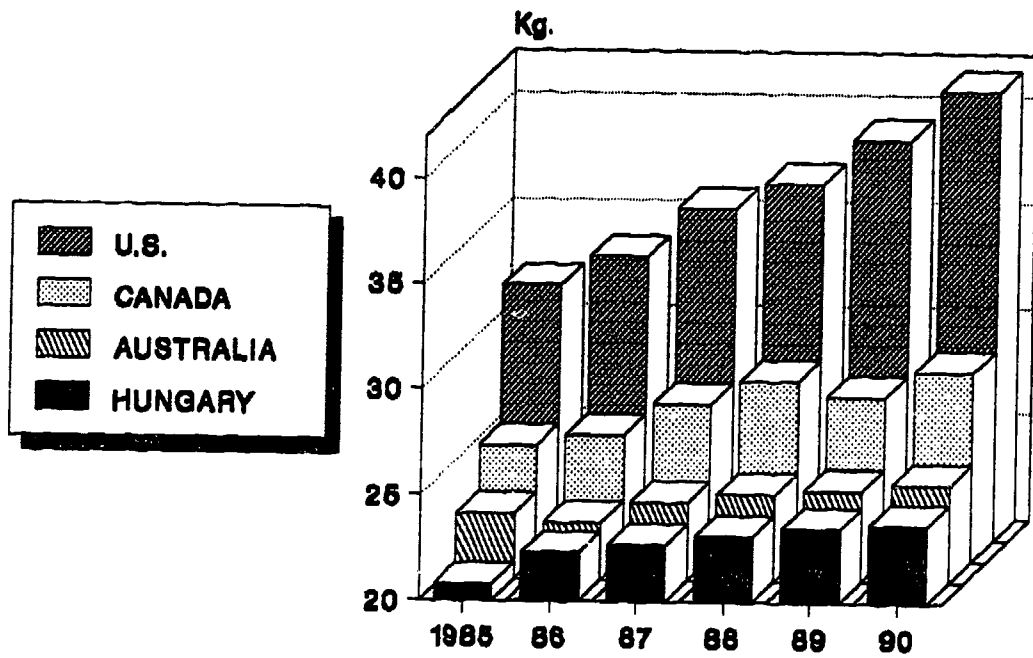
144. The largest producer, the United States, is also and by far, the largest consuming country of poultry. Per capita consumption is estimated

to have increased by another 6 per cent in 1990, to 41.2 kg. Far behind, the second major consumer is Canada with "only" 28.9 kg. and the third world major consumer country is Australia with 24.5 kg. per capita. In the European Community the annual growth is one of the lowest among participants, at approximately one per cent and with 17.9 kg., remaining relatively low compared to the United States, Canada and Australia. Undoubtedly poultry meat intake still has good days ahead, particularly among developing countries. An illustration of this is the evolution of consumption in Brazil where, from 9 kg. in 1980, it now reaches 12-13 kg., coming close to beef consumption levels. Poultry meat industry in this country grew by an estimated 800 per cent in the last twenty years and now offers more than 200 different cuts to consumers. With a drastic economic plan affecting day-by-day life, cheaper poultry meat seems to have been, even more than in the recent past, the best alternative for a consumer frustrated by a deficient supply of beef. Another example of the good perspectives ahead for this industry is the USSR, where the authorities stated their will to double per capita consumption of poultry meat (estimated at 12.6 kg. last year) in the next ten years.

145. The USDA estimates world exports in 1990 to be at 2 million tons, an increase of 11.4 per cent. Participating countries with 1.5 million tons account for approximately 74 per cent of the total. The United States this year should replace the European Community as the major world exporter. Its major market is by far Japan (36 per cent of US broiler exports) followed by the USSR, Hong Kong, Mexico and the Caribbean. EC exports are estimated to fall by 8-9 per cent. France is the major EC exporter (and indeed ranking second or third in the world, depending on the Brazilian performance) and traditionally sells broilers to the Middle East markets (especially Saudi Arabia, the United Arab Emirates, Oman and also Egypt).

146. In Brazil, despite a resurgence of inflation in recent months and an economic recession, the poultry meat sector, unlike other agricultural sectors, continues to grow allowing for expanded exports this year. Reportedly, Brazil is now looking for new markets such as Cuba, the USSR and Japan, thus reducing its dependence on Middle Eastern countries. The weak point of the industry would be the supply of corn. Import tariffs for corn could be reduced, and there would also be moves from the production of soya to corn, which could sustain poultry meat production. Thailand which now emerges as the fifth largest world exporter, with Japan absorbing 84 per cent of the total increased shipments by 12.6 per cent last year. Official data suggest unchanged export levels in Hungary in 1990. However, the USDA indicates a 9.4 per cent rise, largely due to the resurgence of sales to the USSR after a sharp drop in 1989. On the import side, the major event of the last eighteen months was the emergence of the USSR as a major importer of poultry meat from western countries and primarily from the United States. More than 130 thousand tons were imported from this country since September 1989.

POULTRYMEAT - PER CAPITA CONSUMPTION - SELECTED COUNTRIES



POULTRY MEAT SITUATION IN SELECTED COUNTRIES^{1/}

PRODUCTION

	1989	Estimates 1990	%Change 1990/89	Forecast 1991	%Change 1991/90
UNITED STATES	10,091.0	10,772.0	6.7	11,310.6	5.0
EC	6,121.0	6,307.0	3.0	6,192.0 ^{3/}	1.8
USSR ^{2/}	3,300.0	3,400.0	3.0	(5,556) ^{3/}	2.4
BRAZIL	2,080.0	2,300.0	10.6	3,480.0	4.3
JAPAN	1,442.0	1,479.0	2.6	2,400.0	4.3
				1,518.0	2.6

CONSUMPTION

	1989	Estimates 1990	%Change 1990/89	Forecast 1991	%Change 1991/90
UNITED STATES	9,663.0	10,328.0	6.9	10,751.0	4.1
EC	5,849.0	5,987.0	2.4	6,070.8	1.4
USSR ^{2/}	3,510.0	3,670.0	4.6	(6,236.0) ^{3/}	2.5
BRAZIL	1,832.0	1,950.0	6.4	3,760.0	7.7
JAPAN	1,717.0	1,751.0	2.0	2,100.0 ^{4/}	0.7
				1,763.0 ^{4/}	0.7

EXPORTS

	1989	Estimates 1990	%Change 1990/89	Forecast 1991	%Change 1991/90
EC	449.0	430.0	-4.2	430.0	0.0
UNITED STATES	419.1	458.1	9.3	446.0	-2.6
HUNGARY	180.0	180.0	0.0	180.0	0.0
BRAZIL	260.0	300.0	15.4	269.0 ^{3/}	-10.3
THAILAND ^{2/}	111.0	125.0	12.6	140.0	12.0

IMPORTS

	1989	Estimates 1990	%Change 1990/89	Forecast 1991	%Change 1991/90
JAPAN	267.0	296.0	10.9	315.0 ^{4/}	6.4
SAUDI ARABIA ^{2/}	196.0	196.0	0.0	199.0	1.5
USSR ^{2/}	210.0	270.0	28.6	280.0	3.7
HONG KONG ^{2/}	198.0	210.0	6.1	213.0	1.4
EC	116.0	125.0	7.8	130.0	4.0

^{1/} '000 tons, ready-to-cook basis.

^{2/} Source: USDA, Dairy Livestock and Poultry, FL&P 3-90, August 1990.

^{3/} Including the new German Federal States.

^{4/} Secretariat estimates.

The sheepmeat sector

147. While 1989 world production of sheepmeat (including goatmeat) is estimated by the FAO to have totalled 9.06 million tons (+2.5 per cent on year earlier), production in the twenty-one countries participating in the Arrangement Regarding Bovine Meat totalled 3.17 million tons, an increase of 0.2 per cent since 1988. Estimates for 1990 put production in participating countries at 3.3 million tons. The wool market continued to be a dominant factor in the sheepmeat sector. World wool stocks reached record levels, reflecting continuing increased production and falling demand. This fall resulted from the situation in China where the sheep flock and sheepmeat production have been in constant expansion in recent years. Another factor affecting the wool market would have been the fall in the USSR imports due to the shortage of hard currencies. These developments led to strongly weakening wool prices.

148. Australia, which represents 30-35 per cent of world exports, was particularly hit by this situation, especially during the second half of the year. Further affected by a strong Australian dollar and rising oil prices, Australian producers were faced with depressed wool prices and finally a number of measures to discourage wool production. All this led to the supplementary slaughter of 15 to 30 million old sheep (unsuitable for sale) last year. Normal sheep slaughter was already more than 30 per cent above 1989 figures and, despite lower lamb slaughtering, the Australian sheepmeat production was consequently estimated to rise by close to 20 per cent in 1990.

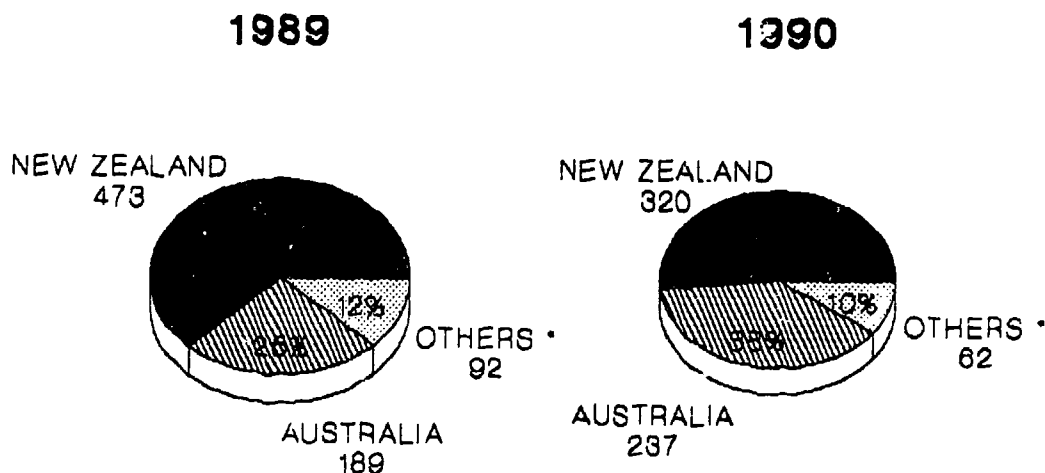
149. The rise in the Australian output was partly offset by a decline in New Zealand sheepmeat production, reflecting lower sheep numbers and emphasis being put on breeding to rebuild flock numbers following the drought. In the European Community production continued to expand, despite the reductions in the EC market support following the implementation of the new sheepmeat régime on 1 January 1990.

150. Following its relatively strong rise in 1989 (estimated at 5.5 per cent, and the first rise in the last few years), estimated total consumption in participating countries continued to increase in 1990, although at a more moderate growth rate (2-3 per cent). The growth slowdown seems due to a significant consumption drop in New Zealand. Sheepmeat intake is now well below a continuously rising poultry meat consumption in most participating countries. However, larger sheepmeat supplies and falling prices in line with the shrinking demand for wool, may well act as a consumption incentive in the short term. In Australia, for instance, per capita consumption is estimated to rise, reflecting increased production and lower prices. On the contrary, the estimated consumption fall in New Zealand was due to lower production and increased retail prices and may recover this year. In the European Community consumption is relatively balanced with production and increased last year and probably through 1991.

151. A 32 per cent drop in New Zealand resulted in an estimated 15 per cent fall of participating countries' exports last year. In line with lower sheep numbers and sheepmeat production, New Zealand sheepmeat exports have been falling in the last few years. Producer returns in 1989-90 were up on the previous season. In the 1990-91 season export lamb slaughtering is expected to rise by around 5 per cent, reflecting an increased lamb crop, but producer returns are nevertheless expected to fall somewhat. Export mutton slaughtering is forecast to fall by 19 per cent, and export mutton returns are expected to be down sharply (-30 to -40 per cent) provoked by increased world supplies.

152. Australia, the second major world exporter, has seen its sales increase by more than 25 per cent last year. Boosted by increasing wool prices since the mid-1980s, the Australian sheep flock grew fast in response to increased profitability. This allowed for large export availabilities. Last year lower New Zealand output left room for increased Australian sales abroad. However, higher sales abroad do not necessarily mean increased profitability and the high slaughtering level in Australia may well be one of the factors affecting world sheepmeat prices in 1990-91. Live sheep exports to Saudi Arabia resumed, but the Iraq/Kuwait crisis throws a new uncertainty on markets in the Middle East.

SHEEPMEAT EXPORTS SELECTED COUNTRIES



• Romania, Korea, Turkey

Thousand tons

SHEEPMEAT SITUATION IN SELECTED COUNTRIES^{1/}

PRODUCTION

	1989	Estimates 1990	%Change 1990/89	Forecast 1991	%Change 1991/90
EC	1,095.0	1,145.0	4.6	1,170.0 (1,182.0) ^{3/}	2.2
USSR ^{2/}	1,000.0	1,000.0	0.0	1,000.0	0.0
CHINA ^{2/}	880.0	990.0	12.5	1,050.0	6.1
NEW ZEALAND	572.0	520.0	-9.1	540.0	3.8
AUSTRALIA	582.5	694.4	19.2	704.1	1.4

CONSUMPTION

	1989	Estimates 1990	%Change 1990/89	Forecast 1991	%Change 1991/90
EC	1,326.0	1,389.0	4.8	1,408.0 (1,430.0) ^{3/}	1.4
USSR	964.0	969.0	0.5	969.0	0.0
CHINA ^{2/}	879.0	989.0	12.5	1,048.0	6.0
INDIA ^{2/}	542.0	563.0	3.9	577.0	2.5
TURKEY ^{2/}	369.0	340.0	-7.9	320.0	-5.9

EXPORTS

	1989	Estimates 1990	%Change 1990/89	Forecast 1991	%Change 1991/90
NEW ZEALAND	472.7	320.0	-32.3	330.0	3.1
AUSTRALIA	188.5	237.0	25.7	234.0	19.8
ROMANIA ^{2/}	50.0	20.0	-60.0	30.0	50.0
KOREA, Rep. of ^{2/}	26.0	27.0	3.8	28.0	3.7
TURKEY ^{2/}	16.0	15.0	-6.3	15.0	0.0

IMPORTS

	1989	Estimates 1990	%Change 1990/89	Forecast 1991	%Change 1991/90
EC	258.0	256.0	-0.8	254.0 ^{4/}	-0.8
JAPAN	117.0	113.0	-3.4	110.0 ^{4/}	2.7
UNITED STATES	25.0	20.0 ^{4/}	-20.0	22.0 ^{4/}	10.0
KOREA, Rep. of ^{2/}	26.0	27.0	3.8	29.0	7.4
USSR ^{2/}	15.0	15.0	0.0	10.0	-33.3

^{1/} '000 tons carcass weight, includes fresh, frozen and canned product but excludes live animals

^{2/} Source: USDA, World Livestock Situation, FL&P 4-90, October 1990

^{3/} Including the new German Federal States

^{4/} Secretariat estimates

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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	1986	1987	1988	1989	% CHANGE 1989 /1988	1990	% CHANGE 1990 /1989	1991	FORECAST 1992
ARGENTINA (30 JUNE) OF WHICH COWS	52,500 20,300	51,000	50,300	49,500	-1.59	49,000	-1.01	49,000	.
AUSTRALIA (31/3) OF WHICH COWS	23,436 9,705	23,667 9,675	23,521 9,686	23,953 9,857	1.84 1.77	24,159 9,944	0.86 0.88	24,300	.
AUSTRIA (3/12) OF WHICH COWS	2,637 1,243	2,586 1,212	2,541 1,200	2,562 1,208	0.83 0.67	2,650	3.43	2,659	.
BRAZIL (1) 1 OF WHICH COWS	128,925 42,027	131,503 42,868	134,133 43,725	136,814 44,599	2.00 2.00	139,550 45,490	2.00 2.00	142,000	.
BULGARIA (1/1) OF WHICH COWS	1,706 670	1,678 653	1,649 646	1,613 648	-2.18 0.31	1,577	-2.23	1,540	.
CANADA (1/1) OF WHICH COWS	10,956 4,727	10,802 4,673	10,863 4,743	11,016 4,817	1.41 1.56	11,201 4,875	1.68 1.20	11,366 4,949	.
COLOMBIA (11) 1,2 OF WHICH COWS	23,510 8,558	23,030 8,383	23,267 8,469	23,267	0.00	23,267	0.00	.	.
EEC (01/12) 1 OF WHICH COWS	84,200 33,725	82,750 33,380	80,325 32,310	79,355 32,000	-1.21 -0.96	80,220 32,005	1.09 0.02	81,200 33,650	.
FINLAND (1/12) 1,3 OF WHICH COWS	1,485 608	1,434 581	1,379 528	1,363 520	-1.16 -1.52	1,357 508	-0.44 -2.31	1,243 452	.
HUNGARY (1/1) OF WHICH COWS	1,766 688	1,664 673	1,690 663	1,598 646	-5.44 -2.56	1,550 635	-3.00 -1.70	1,540	.
JAPAN (1/2) 6 OF WHICH COWS	4,742 2,139	4,694 2,075	4,667 2,038	4,682 2,057	0.32 0.93	4,760	1.67	4,880	.
NEW ZEALAND (30/6) 1 OF WHICH COWS	8,279 3,814	7,999 3,807	8,058 3,714	7,828 3,646	-2.85 -1.83	8,073 3,730	3.13 2.30	8,050 3,650	.

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

COUNTRY	1986	1987	1988	1989	% CHANGE		1990	% CHANGE		FORECAST	
					1989 / 1988	1988 / 1987		1990 / 1989	1990 / 1989	1991	1992
NORWAY (1/1) 4 OF WHICH COWS	1,000 381	995 367	979 354	985 352	0.64 -0.56		995 355	0.98 0.85		989 345	
PARAGUAY (1) OF WHICH COWS	7,151 2,513	7,374 2,589	7,780 2,729	8,074 2,825	3.78 3.52		8,074 .	0.00 .		. .	
POLAND (30/6) OF WHICH COWS	10,919 5,207	10,523 4,936	10,322 4,806	10,733 4,994	3.98 3.91		10,049 4,919	-6.37 -1.50		10,000 4,900	9,900 4,800
ROMANIA (31/1) 6 OF WHICH COWS	7,077 .	7,225 .	7,182 .	7,170 .	-0.17 .		7,167 .	-0.04.		..	..
SOUTH AFRICA (31/8) 1 OF WHICH COWS	7,827 3,975	7,909 3,982	8,198 4,038	8,611 4,191	5.04 3.79		8,620 .	0.10 .		8,816 .	8,934 .
SWEDEN (30/6) OF WHICH COWS	1,715 656	1,655 629	1,662 625	1,672 623	0.60 -0.32		1,716 650	2.63 4.33		1,635 610	1,525 555
SWITZERLAND (21/4) 1 OF WHICH COWS	1,902 970	1,858 959	1,837 951	1,850 957	0.71 0.63		1,850 953	0.00 -0.42		1,840 .	. .
TUNISIA (1) OF WHICH COWS	624 334	666 355	670 358	696 372	3.88 3.91		696 .	0.00.		..	..
UNITED STATES (1/1) 1 OF WHICH COWS	105,378 44,869	102,118 44,411	99,622 43,494	99,180 43,727	-0.44 0.54		99,337 43,854	0.16 0.29		101,238 .	. .
URUGUAY (30/6) 1 OF WHICH COWS	9,300 3,601	9,945 3,804	10,331 3,889	9,446 3,282	-8.57 -15.61		8,723 3,177	-7.65 -3.20		8,598 3,284	. .
YUGOSLAVIA (15/1) OF WHICH COWS	5,034 2,915	5,030 2,893	4,881 2,903	4,759 2,858	-2.50 -1.55		4,693 2,781	-1.39 -2.69		. .	. .

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

COUNTRY		1986	1987	1988	1989	% CHANGE		% CHANGE		FORECAST	
						1989 / 1988	1990 / 1989	1990	1991	1991	1992
ARGENTINA	- ADULT CATTLE 1,4	12,400	11,700	11,300	11,600	2.65	-4.38	12,000	11,500	.	.
	- CALVES	1,600	1,110	900	950	5.56	.	.	.	.	.
AUSTRALIA	- ADULT CATTLE	6,599	6,861	6,695	6,513	-2.72	7.92	7,029	7,025	.	.
	- CALVES	1,261	1,188	1,026	973	-5.17	2.77	1,000	1,080	.	.
AUSTRIA	- ADULT CATTLE 2,4	671	673	639	611	-4.38	3.07	805	.	.	.
	- CALVES	199	193	187	170	-9.09	.	.	.	.	.
BRAZIL	- ADULT CATTLE 1	8,700	9,949	11,872	13,427	13.10	-18.45	10,950	.	.	.
	- CALVES	33	47	35	33	-5.71	51.52	50	.	.	.
BULGARIA	- ADULT CATTLE 1,2,4	590	516	514	499	-2.92	-0.40	497	.	.	.
	- CALVES	.	.	.	.	.	.	.	.	.	.
CANADA	- ADULT CATTLE 1,3	3,235	2,991	2,892	2,943	1.76	-3.81	2,831	2,842	.	.
	- CALVES	620	565	545	561	2.94	-26.92	410	398	.	.
COLOMBIA	- ADULT CATTLE 4,5	3,185	3,077	3,160	3,327	5.28	1.02	3,361	.	.	.
	- CALVES	.	.	.	.	.	.	.	.	.	.
EEC	- ADULT CATTLE 1	24,524	24,475	22,684	21,953	-3.22	3.84	22,795	24,470	.	.
	- CALVES	7,236	7,272	6,658	6,069	-8.85	-13.41	5,255	5,965	.	.
FINLAND	- ADULT CATTLE	577	569	514	474	-7.78	3.38	490	.	.	.
	- CALVES	42	46	29	20	-31.03	-20.00	16	.	.	.
GUATEMALA	- ADULT CATTLE 4	34	.	.	.	.	.	.	.	.	.
	- CALVES	.	.	.	.	.	.	.	.	.	.
HUNGARY	- ADULT CATTLE 3	367	382	314	.	.	.	.	.	.	.
	- CALVES	6	5	5	.	.	.	.	.	.	.
JAPAN	- ADULT CATTLE 2,4	1,524	1,486	1,443	1,376	-4.64	2.01	1,420	.	.	.
	- CALVES	30	22	18	16	-11.11	.	.	.	.	.

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

COUNTRY		1986	1987	1988	1989	% CHANGE		1990	% CHANGE		FORECAST	
						1989 / 1988	1990 / 1989		1990 / 1989	1991	1992	
ARGENTINA	- BEEF 3,5	2,690.0	2,570.0	2,527.0	2,509.0	-0.71	2,700.0	2.43	.	.	.	.
	- VEAL	180.0	130.0	108.0	127.0	17.59	.	.	.	.	.	.
AUSTRALIA	- BEEF 2	1,434.6	1,526.4	1,515.8	1,532.0	1.07	1,659.0	8.29	1,654.0	.	.	.
	- VEAL	41.7	38.0	34.8	33.0	-5.17	36.0	9.09	36.0	.	.	.
AUSTRIA	- BEEF 3	221.3	220.0	211.0	215.0	-5.41	218.0	1.39	221.0	.	.	.
	- VEAL	17.3	17.4	16.3	.	.	.	.	.	.	.	.
BRAZIL	- BEEF 2	1,864.0	2,133.0	2,443.0	2,746.0	12.40	2,846.0	3.64	2,996.0	.	.	.
	- VEAL	4.0	3.0	3.0	2.0	-33.33	4.0	0.00	4.0	.	.	.
BULGARIA	- BEEF 1,4	163.0	132.0	131.0	125.0	-4.58	152.0	21.60	.	.	.	.
	- VEAL	.	.	.	.	.	.	.	.	.	.	.
CANADA	- BEEF	990.5	932.4	927.7	931.0	0.35	907.0	-2.57	914.0	.	.	.
	- VEAL	45.2	44.8	45.0	48.5	7.77	47.0	-3.09	46.0	.	.	.
COLOMBIA	- BEEF 1,3	206.2	194.5	201.3	616.0	5.23	623.0	1.13	.	.	.	.
	- VEAL	386.3	378.6	384.1	.	.	.	.	.	.	.	.
EEC	- BEEF	7,170.0	7,213.0	6,823.0	6,670.0	-2.24	6,980.0	4.64	7,030.0	.	.	.
	- VEAL	894.0	920.0	860.0	790.0	-8.13	780.0	-1.26	775.0	.	.	.
FINLAND	- BEEF 2	124.3	122.7	111.1	106.9	-3.78	116.0	8.51	118.0	.	.	.
	- VEAL	0.6	0.7	0.4	0.3	-25.00	0.3	0.00	0.3	.	.	.
HUNGARY	- BEEF 3	123.9	125.0	94.7	98.0	3.48	95.0	-3.06	94.0	.	.	.
	- VEAL	0.3	.	.	0.2	.	.	.	.	.	.	.
JAPAN	- BEEF 1,3	557.0	563.0	568.0	547.0	-3.69	567.0	3.45	586.0	.	.	.
	- VEAL	1.9	1.6	1.3	1.1	-15.38	.	.	.	.	.	.
NEW ZEALAND	- BEEF 2	487.8	529.4	584.1	502.5	-13.97	480.0	-4.47	530.0	.	.	520.0
	- VEAL	16.2	15.1	16.5	15.9	-3.63	15.5	-2.51	14.5	.	.	14.5

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

COUNTRY		1986	1987	1988	1989	% CHANGE		1990	% CHANGE		1991	1992
						1989 / 1988	1990 / 1989		1990 / 1989	1991	1992	
NORWAY	- BEEF	72.7	74.0	73.7	73.9	0.27	8.93	80.5		79.9		
	- VEAL	2.1	2.5	1.8	1.4	-22.22	-7.14	1.3		1.5		
PARAGUAY	- BEEF 2	174.9	189.0	200.6	192.3	-4.13	-3.53	185.5		192.0		
	- VEAL	.	.	.	.	.	.	.		.
POLAND	- BEEF 1,3	674.0	663.0	625.0	675.0	8.00	-5.97	677.0		626.0		
	- VEAL	32.0	27.0	22.0	45.0	4.54	.	.		.		
ROMANIA	- BEEF 1,4	195.0	240.0	230.0	235.0	2.17	-2.12	230.0		.		
	- VEAL	.	.	.	.	.	.	.		.
SOUTH AFRICA	- BEEF 2	631.8	594.0	570.9	600.6	5.20	6.56	640.0		642.7		647.7
	- VEAL	4.3	3.1	2.1	2.1	0.00	9.52	2.3		2.3		2.5
SWEDEN	- BEEF	136.0	127.0	121.0	131.0	8.26	6.87	140.0		146.0		145.0
	- VEAL	11.0	8.0	5.0	7.0	40.00	0.00	7.0		6.0		6.0
SWITZERLAND	- BEEF	133.8	134.9	118.4	120.7	1.94	3.56	125.0		122.0		.
	- VEAL	35.6	38.7	35.3	34.5	-2.26	1.44	35.0		35.0		.
TUNISIA	- BEEF	33.3	32.0	34.3	36.4	6.12	0.00	36.4		.		.
	- VEAL	.	.	.	.	.	.	.		.		.
UNITED STATES	- BEEF	11,054.0	10,690.0	10,700.0	10,472.0	-2.13	-1.01	10,366.0		10,484.0		.
	- VEAL	238.0	194.0	180.0	161.0	-10.55	-9.31	146.0		137.0		.
URUGUAY	- BEEF 2	345.0	268.0	313.0	373.0	19.16	-7.23	346.0		299.0		.
	- VEAL	9.0	8.0	8.0	10.0	25.00	-30.00	7.0		7.0		.
YUGOSLAVIA	- BEEF 1,3	339.0	359.0	346.0	333.0	-3.75	6.00	353.0		350.0		.
	- VEAL	.	.	.	.	.	.	.		.		.
TOTAL	- BEEF	29,822.1	29,632.3	29,470.6	29,841.3	1.26	2.28	30,522.4		27,084.6		1,312.7
	- VEAL	1,919.5	1,830.5	1,723.6	1,279.0	-25.79	-15.45	1,061.4		1,064.6		23.0

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

COUNTRY	1986	1987	1988	1989	% CHANGE		% CHANGE		FORECAST	
					1989 / 1988	1990 / 1989	1990 / 1989	1991	1992	
AUSTRALIA 1	33.1	34.6	33.2	30.4	-8.43	33.0	8.55	34.5	.	.
AUSTRIA	4.0	4.0	2.0	3.0	50.00	.	.	.	.	.
BRAZIL 2	195.0	90.0	23.0	7.0	-69.56	7.0	0.00	.	.	.
CANADA 2	16.6	17.9	18.7	15.6	-16.57	15.6	0.00	15.6	15.6	16.5
EEC 3	720.0	878.0	611.0	258.0	-57.77	600.0	132.55	600.0	600.0	.
FINLAND	5.3	3.7	5.1	6.9	35.29	7.0	1.44	.	.	.
HUNGARY	7.6	7.4	6.6	.	.	.	.	.	.	.
NORWAY	2.1	3.3	0.8	3.7	362.50	2.5	-32.43	3.5	3.5	.
SOUTH AFRICA 2	0.5	-	-	-	.	0.3	.	0.0	0.0	0.0
SWEDEN 2	4.0	3.0	4.0	5.0	25.00	3.0	-40.00	0.0	0.0	0.0
SWITZERLAND	9.0	3.2	1.0	1.3	30.00	4.0	207.69	.	.	.
TUNISIA	1.2	1.3	1.0	-	.	.	.	.	.	.
UNITED STATES	178.0	175.0	187.0	141.0	-24.59	150.0	6.38	.	.	.
URUGUAY 2	10.0	20.0	16.0	22.0	37.50	10.0	-54.54	10.0	10.0	.
TOTAL	1,186.4	1,241.4	909.4	493.9	-45.68	832.4	68.53	663.6	663.6	16.5

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

COUNTRY		1986	1987	1988	1989	% CHANGE		% CHANGE		FORECAST	
						1989 / 1988	1990	1990 / 1989	1991	1992	
ARGENTINA	-TOTAL2	2,620.0	2,413.0	2,315.0	2,276.0	-1.68	2,120.0	-6.85	2,050.0	.	
	-PER CAPITA	85.1	77.4	73.0	70.0	-4.10	64.0	-8.57	62.0	.	
AUSTRALIA	-TOTAL2	663.0	654.5	663.5	700.0	5.50	660.0	-5.71	685.0	.	
	-PER CAPITA	41.4	40.2	40.0	41.5	3.75	38.7	-6.75	39.3	.	
AUSTRIA	-TOTAL1	169.0	171.0	168.5	166.5	-1.18	165.5	-0.60	164.0	.	
	-PER CAPITA	22.4	22.6	22.2	21.9	-1.35	.	.	.	.
BRAZIL	-TOTAL2	1,997.0	1,983.0	1,936.0	2,641.0	36.41	2,810.0	6.39	2,700.0	.	
	-PER CAPITA	14.4	14.0	13.4	17.9	33.58	18.7	4.46	17.6	.	
BULGARIA	-TOTAL3	97.0	120.0	119.0	133.0	11.76	131.0	-1.50	120.0	.	
	-PER CAPITA	11.0	.	.	.	.	.	.	.	.
CANADA	-TOTAL2	1,047.1	1,021.6	1,033.1	1,031.2	-0.18	1,029.0	-0.21	1,025.0	.	
	-PER CAPITA	41.3	39.8	39.8	39.3	-1.25	38.8	-1.27	38.4	.	
COLOMBIA	-TOTAL1	582.5	561.9	573.3	603.0	5.18	609.0	0.99	.	.	
	-PER CAPITA	20.6	19.5	19.6	.	.	.	.	.	.
EEC	-TOTAL2	7,530.0	7,520.0	7,440.0	7,400.0	-0.53	7,120.0	-3.78	7,350.0	.	
	-PER CAPITA	23.4	23.3	22.9	22.7	-0.87	21.8	-3.96	22.3	.	
FINLAND	-TOTAL2	102.6	102.9	105.7	104.6	-1.04	109.0	4.20	110.0	.	
	-PER CAPITA	20.9	20.9	21.4	21.1	-1.40	21.0	-0.47	21.0	.	
HUNGARY	-TOTAL1	88.5	87.6	87.6	84.5	-3.53	83.0	-1.77	82.0	.	
	-PER CAPITA	8.9	8.6	.	.	.	.	.	.	.
JAPAN	-TOTAL1	829.0	884.0	957.0	994.0	3.86	1,039.0	4.52	1,087.0	.	
	-PER CAPITA	6.8	7.2	7.8	7.8	0.00	.	.	.	.
NEW ZEALAND	-TOTAL2	120.8	131.3	133.5	119.0	-10.86	112.4	-5.54	117.5	117.5	
	-PER CAPITA	36.8	39.7	39.9	34.1	-14.53	33.4	-2.05	34.7	34.6	

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

COUNTRY		1986	1987	1988 ^a	1989	% CHANGE		1990	% CHANGE		FORECAST	
						1989 / 1988	1990 / 1989		1990 / 1989	1991	1992	
NORWAY	-TOTAL	79.5	76.1	78.8	73.3	-6.97		75.0	2.31	75.4		
	-PER CAPITA	19.1	18.2	18.7	17.4	-6.95		17.7	1.72	17.7		
PARAGUAY	-TOTAL2	129.1	172.1	184.7	122.5	-33.67		135.5	10.61	132.0		
	-PER CAPITA	35.0	45.0	46.0	30.6	-33.47		32.0	4.57	31.0		
POLAND	-TOTAL	633.0	628.0	657.0	620.0	-5.63		573.0	-7.58	544.0		
	-PER CAPITA	16.9	16.7	17.4	16.3	-6.32		.	.	.		
SOUTH AFRICA	-TOTAL2	650.2	653.8	628.8	653.3	3.89		668.7	2.35	656.0	663.5	
	-PER CAPITA	18.3	17.7	16.1	16.7	3.72		16.9	1.19	17.0	17.7	
SWEDEN	-TOTAL2	135.0	145.0	141.0	144.0	2.12		147.0	2.08	148.0	149.0	
	-PER CAPITA	16.1	17.3	17.0	17.1	0.58		17.2	0.58	17.3	17.3	
SWITZERLAND	-TOTAL	177.6	187.0	173.5	173.9	0.23		170.0	-2.24	168.0		
	-PER CAPITA	26.7	27.9	26.7	24.7	-7.49		27.0	9.31	.		
TUNISIA	-TOTAL	50.2	48.5	50.2	50.7	0.99		50.7	0.00	.		
	-PER CAPITA	6.7	6.3	6.4	6.3	-1.56		6.3	0.00	.		
UNITED STATES	-TOTAL	12,036.0	11,660.0	11,641.0	11,196.0	-3.82		11,092.0	-0.92	11,177.0		
	-PER CAPITA	49.8	47.8	47.3	45.0	-4.86		44.2	-1.77	44.2		
URUGUAY	-TOTAL2	178.0	173.0	194.0	200.0	3.09		184.0	-8.00	180.0		
	-PER CAPITA	60.0	58.0	65.0	67.0	3.07		61.0	-8.95	60.0		
YUGOSLAVIA	-TOTAL1	301.0	321.0	319.0	307.0	-3.76		280.0	-8.79	.		
	-PER CAPITA	13.4	14.2	14.1	.	.		.	.	.
TOTAL	-TOTAL	30,216.1	29,715.3	29,600.2	29,793.5	0.65		29,363.8	-1.44	28,570.9	930.0	

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

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

COUNTRY	1986	1987	1988	1989	% CHANGE		1990	% CHANGE		FORECAST	
					1989 / 1988	1990 / 1989		1991	1992		
BRAZIL 2	(8.4)	(7.0)	-	110.0 (25.0)	:	:	50.0 (10.0)	-54.54 (-60.00)	30.0 (8.0)	:	:
BULGARIA	5.2	2.3	2.0	2.1	5.00	:	:	:	:	:	:
CANADA	59.0 (16.1)	84.1 (23.5)	38.3 (10.7)	39.5 (10.3)	3.13 (-3.73)	:	12.0 (3.5)	-69.62 (-66.01)	18.0 (5.3)	:	:
COLOMBIA 1	3.3	6.6	-	-	:	:	:	:	:	:	:
EEC 2	480.0 (63.0)	667.0 (86.0)	570.0 (87.0)	907.0 (101.0)	59.12 (16.09)	:	950.0 (95.0)	4.74 (-5.94)	800.0 (80.0)	:	:
HUNGARY 4	31.8 (4.9)	-	21.3 (3.3)	25.0	17.37	:	25.0	0.00	:	:	:
JAPAN 5	35.1 (15.0)	39.6 (17.0)	35.0 (15.0)	35.2 (15.0)	0.57 (0.00)	:	35.0	-0.56	:	:	:
SOUTH AFRICA 2	147.0 (29.3)	190.0 (39.2)	165.0 (35.5)	172.0 (37.5)	4.24 (5.63)	:	158.0 (33.8)	-8.13 (-9.86)	150.0 (30.0)	147.0 (29.0)	:
SWITZERLAND	4.0 (0.7)	3.7 (0.6)	13.5 (2.1)	5.3 (0.8)	-60.74 (-61.90)	:	4.0	-24.52	:	:	:

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

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

COUNTRY	1986	1987	1988	1989	% CHANGE		% CHANGE		FORECAST	
					1989 / 1988	1990 / 1989	1990 / 1989	1991	1992	
TUNISIA	16.7 (4.0)	12.0 (2.9)	12.0 (2.9)	.	.	.	.	.	.	.
UNITED STATES	1,385.0	1,180.0	1,319.0	1,448.0	9.78	22.58	1,775.0	1,675.0	.	.
YUGOSLAVIA	(2.3)	(6.9)	(12.1)	(34.6)	(185.95)	.	.	.	.	.
TOTAL	2,167.1 (143.7)	2,185.3 (183.1)	2,176.1 (168.6)	2,744.1 (224.2)	26.10 (32.97)	9.65 (-36.52)	3,009.0 (142.3)	2,673.0 (123.3)	147.0 (29.0)	

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

('000 METRIC TONS, CARCASS WEIGHT EQUIVALENT)

COUNTRY	1986	1987	1988	1989	% CHANGE		1990	% CHANGE		FORECAST	
					1989 / 1988	1989 / 1988		1990 / 1989	1990 / 1989	1991	1992
AUSTRALIA	3.1	2.9	3.6	7.8	16.66	.	.	.	.	.	.
AUSTRIA	2.0	2.0	3.0	3.0	0.00	.	.	.	.	.	.
BRAZIL 2	474.0	136.0	16.0	192.0	0.00	190.0	-1.04	152.0	.	.	.
BULGARIA	10.0	4.6	13.2	23.2	75.75	.	.	.	.	.	.
CANADA	103.3	126.4	150.1	153.9	2.53	173.0	12.41	170.0	.	.	.
EEC 2	246.0	260.0	243.0	234.0	-3.70	237.0	1.28	250.0	.	.	.
FINLAND	-	-	2.5	1.5	-40.00	1.0	-33.33	.	.	.	.
HUNGARY	16.7	12.0	14.4	11.9	-17.36	10.0	-15.96	.	.	.	.
JAPAN 3	254.0	310.0	370.0	484.0	30.81	562.0	11.95	622.0	.	.	.
NEW ZEALAND 4	0.1	0.2	0.3	0.9	0.00	1.1	22.22	0.9	0.9	0.9	0.9
NORWAY	5.4	-	1.2	1.1	-8.33	.	.	.	.	.	.
POLAND 1,3	1.2	-	45.9	113.0	46.18	90.0	-20.35	77.0	.	.	.
SOUTH AFRICA 2	23.9	43.2	62.9	57.9	-7.94	34.1	-41.10	18.0	18.0	21.0	21.0

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

('000 METRIC TONS, CARCASS WEIGHT EQUIVALENT)

COUNTRY	1986	1987	1988	1989	% CHANGE 1989 /1988	1990	% CHANGE 1990 /1989	1991	FORECAST 1992
SWEDEN	7.5	14.6	19.1	12.0	-37.17	13.0	8.33	8.0	3.0
SWITZERLAND	7.6	10.3	10.6	8.3	-21.69	6.0	-27.71	.	.
TUNISIA	10.5	11.1	10.9	.	.	.	.	.	.
UNITED STATES	949.0	1,008.0	1,058.0	957.0	-9.54	990.0	3.44	998.0	.
YUGOSLAVIA	30.3	40.9	52.7	61.5	16.69	.	.	.	.
TOTAL	2,144.6	1,982.2	2,077.4	2,323.0	11.82	2,307.2	-0.68	2,295.9	24.9

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

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

COUNTRY	1986	1987	1988	1989	% CHANGE		1990	% CHANGE 1990 / 1989	1991	FORECAST 1992
					1989 / 1988	1990 / 1989				
AUSTRALIA	0.6	0.8	0.3	0.4	33.33	.	.	.	.	.
BULGARIA	-	0.1	0.1	0.2	0.00	.	.	.	.	.
CANADA	8.2	9.1	4.2	4.4	4.76	4.0	4.0	-9.09	4.0	.
EEC	156.0	151.0	178.0	172.0	-3.37	175.0	175.0	1.74	175.0	.
HUNGARY	0.4	-	-	.	.	.	.	.	.	.
JAPAN	18.0	19.0	17.0	18.0	5.88	.	.	.	.	.
NORWAY	0.5	-	0.4	0.4	0.00	.	.	.	.	.
POLAND	0.2	0.2	0.2	-	.	.	.	.	.	.
SWEDEN	0.6	1.1	1.9	2.2	15.78	2.0	2.0	-9.09	2.0	2.0
SWITZERLAND	3.2	3.4	2.2	2.2	0.00	2.0	2.0	-9.09	.	.
UNITED STATES	29.0	32.0	33.0	30.0	-9.09	31.0	31.0	3.33	.	.
TOTAL	216.7	216.7	237.3	229.8	-3.16	214.0	214.0	-6.87	181.0	2.0

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

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

COUNTRY	1986	1987	1988	1989	% CHANGE		1990	% CHANGE		FORECAST	
					1989 / 1988	1989 / 1989		1990 / 1989	1991	1992	
AUSTRALIA	73.1 (13.8)	92.7 (17.6)	83.4 (16.7)	104.4 (22.0)	25.17 (31.73)	95.0 (17.0)	-9.00 (-22.72)	.	.	.	.
AUSTRIA	19.0 (12.0)	20.0 (12.0)	17.0 (10.0)	7.0 (4.0)	-58.82 (-60.00)	.	.	.	.	.	.
BULGARIA 4	13.7	17.8	28.9	23.5	-18.68	23.5	0.00	.	.	.	.
CANADA 1,2	178.0 (48.9)	194.0 (54.2)	403.0 (110.1)	329.0 (93.6)	-18.36 (-14.98)	400.0 (117.6)	21.58 (25.64)	350.0 (103.0)	.	.	.
COLOMBIA 1	0.1	-	-	-	.	.	.	.	.	.	.
EEC 2	187.0 (50.0)	168.0 (43.0)	125.0 (31.0)	115.0 (31.0)	-8.00 (0.00)	125.0 (35.0)	8.69 (12.90)	105.0 (25.0)	.	.	.
HUNGARY	182.7 (49.5)	156.0 (39.2)	148.3 (43.0)	142.0 (42.2)	-4.24 (-1.86)	75.0 (22.0)	-47.18 (-47.86)	.	.	.	.
NEW ZEALAND 2,4	-	-	5.9 (1.5)	5.9 (1.4)	0.00 (-6.66)	0.8 (0.2)	-86.44 (-85.71)	1.0 (0.2)	1.0 (0.2)	1.0 (0.2)	.
POLAND 1,2	299.0 (35.8)	414.0 (52.0)	561.0 (76.5)	667.0 (80.9)	18.89 (5.75)	667.0	0.00	.	.	.	.

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

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

COUNTRY	1986	1987	1988	1989	% CHANGE 1989 / 1988	1990	% CHANGE 1990 / 1989	1991	FORECAST 1992
ROMANIA	25.0	-	-	-	.	.	.	.	.
UNITED STATES 2	42.0	62.0	235.0	85.0	-63.82	76.0	-10.58	.	.
URUGUAY 2	-	-	-	114.0 (16.0)	.	.	.	.	.
YUGOSLAVIA	(42.9)	(76.1)	(87.8)	(85.8)	(-2.27)	.	.	.	.
TOTAL	1,019.6 (252.9)	1,124.5 (294.1)	1,607.5 (376.6)	1,592.8 (376.9)	-0.91 (0.07)	1,462.3 (191.8)	-8.19 (-49.11)	456.0 (128.2)	1.0 (0.2)

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

('000 METRIC TONS CARCASS WEIGHT EQUIVALENT)

COUNTRY	1986	1987	1988	1989	% CHANGE		1990	% CHANGE		FORECAST	
					1989 / 1988	1990 / 1989		1991	1992		
ARGENTINA 1,2	112.0	99.0	113.0	145.0	28.31	25.00	450.0	450.0	450.0	.	
AUSTRALIA	795.0	893.0	879.6	854.0	-2.91	20.37	1,028.0	969.0	969.0	.	
AUSTRIA 5	62.0	63.0	58.0	49.0	-15.51	6.12	52.0	.	.	.	
BRAZIL 1,3	107.0	87.0	221.0	81.0	-63.34	39.31	450.0	210.0	210.0	.	
BULGARIA	15.8	9.5	5.4	7.6	40.74	.	.	.	.	.
CANADA 2	101.7	89.7	85.2	105.3	23.59	-6.93	98.0	105.0	105.0	.	
COLOMBIA	11.0	11.6	15.5	.	.	.	.	.	.	.
EEC 2	1,074.0	830.0	724.0	965.0	33.28	-29.01	685.0	895.0	895.0	.	
FINLAND	9.5	5.3	-	-	.	.	.	.	.	.
GUATEMALA	3.9	.	.	.	.	.	.	.	.	.
HUNGARY	36.5	40.3	29.4	33.7	14.62	-25.81	25.0	.	.	.	
NEW ZEALAND 2,4	358.0	432.3	482.1	453.3	-5.97	-13.08	394.0	435.0	435.0	425.0	
NORWAY 1	0.2	1.1	0.2	0.1	-50.00	816.66	5.5	.	.	.	

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

('000 METRIC TONS CARCASS WEIGHT EQUIVALENT)

COUNTRY	1986	1987	1988	1989	% CHANGE		% CHANGE		FORECAST	
					1989 / 1988	1990	1990 / 1989	1991	1992	
PARAGUAY 2	45.4	16.9	15.8	69.5	339.87	74.4	7.05	69.3	.	.
POLAND 1,2	46.3	57.3	61.2	59.3	-3.10	80.6	14.98	52.0	.	.
SOUTH AFRICA 2	2.4	0.9	0.8	0.7	-12.50	0.9	28.57	0.7	1.0	1.0
SWEDEN 2	22.0	5.8	2.8	4.6	64.28	11.0	139.13	14.0	7.0	7.0
SWITZERLAND	3.0	4.6	-	-	.	.	.	.	.	.
UNITED STATES 2	216.0	252.0	281.0	443.0	57.65	458.0	3.38	485.0	.	.
URUGUAY 2	161.0	78.0	117.0	156.0	33.33	156.0	0.00	108.0	.	.
YUGOSLAVIA	27.2	24.8	27.6	28.5	3.26	26.0	-8.77	.	.	.
TOTAL	3,209.9	3,002.1	3,119.6	3,455.6	10.77	3,544.4	2.57	3,793.0	433.0	

TABLE 11 - EXPORTS OF BEEF AND VEAL OTHER THAN FRESH, CHILLED AND/OR FROZEN
(CANNED, COOKED, ETC.)
('000 METRIC TONS CARCASS WEIGHT EQUIVALENT)

COUNTRY	1986	1987	1988	1989	% CHANGE		1990	% CHANGE		FORECAST	
					1989 / 1988	1989 / 1988		1990 / 1989	1990 / 1989	1991	1992
ARGENTINA	144.0	192.0	208.0	215.0	3.36						
AUSTRALIA	34.0	18.0	22.0	18.0	-18.18	22.0	22.22			21.0	
BRAZIL	257.0	209.0	308.0	242.0	-21.42						
BULGARIA	-	-	-	1.4							
CANADA	1.7	1.5	3.6	1.2	-66.66	1.0	-16.66			1.5	
EEC	43.0	36.0	30.0	29.0	-3.33	25.0	-13.79			30.0	
FINLAND	12.8	16.7	9.9	4.9	-50.50	8.0	63.26				
HUNGARY	3.6	-	4.7	5.0	6.38	5.0	0.00				
NORWAY	0.1	0.2	0.5	0.5	0.00						
PARAGUAY	0.5	-	0.2	0.3	50.00	0.6	100.00			0.7	
POLAND	6.4	8.3	7.7	10.8	40.25						
SWEDEN	1.9	1.4	3.4	4.0	17.64	2.0	-50.00			1.0	0.0
SWITZERLAND	0.7	0.7	0.7	0.9	28.57	0.9	0.00				
UNITED STATES	23.0	25.3	32.0	21.0	-34.37	18.0	-14.28			23.0	
URUGUAY	25.0	15.0	14.0	21.0	50.00	25.0	19.04			18.0	
YUGOSLAVIA	1.8	2.7	-	-							
TOTAL	555.5	526.5	644.7	575.6	-10.72	107.5	-81.32			95.2	0.0

TABLE 12 - BEEF PRICE - AVERAGE PRICE RECEIVED BY PRODUCERS

COUNTRY	1986	1987	1988	1989	% CHANGE	
					1989 /1988	1990 /1989
ARGENTINA (\$a/100 KG.)	53.80	141.40	609.00	19,036.00	3025.78	.
AUSTRALIA (\$a/100 KG.)	174.30	187.00	204.00	213.00	4.41	.
AUSTRIA (Cz\$/100 KG.)	2,346.00	2,380.00	2,542.00	.	.	.
BRAZIL (NCz\$/100 KG.)	191.00	172.00	135.00	.	.	.
CANADA (Can\$/100 KG.)	134.70	155.00	151.00	169.00	11.92	.
COLOMBIA (Col\$/100 KG.)	18,147.00	25,829.00	.	.	.	.
EEC (ECU/100 KG.)	305.30	289.00	292.00	301.00	3.08	281.00 -6.64
FINLAND (FIM/100 KG.)	2,511.00	2,554.00	2,735.00	2,799.00	2.34	.
HUNGARY (Ft/100 KG.)	4,570.00	4,950.00	5,000.00	.	.	.
JAPAN (Y/100 KG.)	479.00	462.00	438.00	457.00	4.34	.
NEW ZEALAND (\$NZ/100 KG.)	141.00	157.00	151.00	210.00	39.07	230.00 9.52
NORWAY (NOK/100 KG.)	3,382.00	3,577.00	3,594.00	3,704.00	3.06	.
PARAGUAY (\$p/100 KG.)	583.00	722.00	765.00	994.00	29.93	.

TABLE 12 - BEEF PRICE - AVERAGE PRICE RECEIVED BY PRODUCERS

COUNTRY	1986	1987	1988	1989	% CHANGE 1989 /1988	1990	% CHANGE 1990 /1989
POLAND (Zl/100 KG.)	15,000.00	17,610.00	34,240.00	101,020.00	195.04	.	.
SOUTH AFRICA (R/100 KG.)	289.20	402.00	471.00	472.00	0.21	.	.
SWEDEN (SEK/100 KG.)	2,054.00	2,356.00	2,715.00	2,803.00	3.24	.	.
SWITZERLAND (Sw F/100 KG.)	544.00	565.00	628.00	612.00	-2.55	.	.
TUNISIA (D/100 KG.)	245.00	250.00	.	.	.	.	.
UNITED STATES (US\$/100 KG.)	52.90	61.00	67.00	70.00	4.48	.	.
URUGUAY (NUr\$/100 KG.)	13,205.00	27,258.00	34,980.00	58,447.00	67.09	129,818.00	122.11
YUGOSLAVIA (Din/100 KG.)	70,600.00	126,300.00	410,800.00	7196100.00	1651.73	.	.

TABLE 13 - AVERAGE RETAIL PRICE FOR BEEF

COUNTRY	1986	1987	1988	1989	% CHANGE 1989 / 1988	1990	% CHANGE 1990 / 1989
ARGENTINA (\$a/KG.)	1.86	4.94	18.68	524.05	2705.41	.	.
AUSTRALIA (\$a/KG.)	8.37	8.59	9.28	10.04	8.19	10.43	3.88
AUSTRIA (Cz\$/KG.)	157.00	16.00	16.20	.	.	.	.
BRAZIL (NCz\$/KG.)	3.22	3.72	2.76	.	.	.	.
CANADA (Can\$/KG.)	10.05	10.88	11.33	11.54	1.85	.	.
COLOMBIA (Col\$/KG.)	475.32	667.45	.	.	.	.	.
FINLAND (FIM/KG.)	45.71	45.63	49.32	53.28	8.03	.	.
HUNGARY (Ft/KG.)	78.00	91.50	113.00	.	.	.	.
JAPAN (Y/KG.)	3.53	3.55	3.55	3.65	2.82	.	.
NEW ZEALAND (\$NZ/KG.)	5.18	5.78	5.91	7.28	23.18	8.00	9.89
NORWAY (NOK/KG.)	66.14	73.72	.	.	.	.	.
PARAGUAY (\$P/KG.)	.	1,400.00	1,450.00	1,600.00	10.34	.	.
POLAND (Zl/KG.)	368.00	404.00	585.00	37.16	-93.65	.	.

TABLE 13 - AVERAGE RETAIL PRICE FOR BEEF

COUNTRY	1986	1987	1988	1989	% CHANGE 1989 / 1988	1990	% CHANGE 1990 / 1989
SOUTH AFRICA (R/KG.)	7.59	10.18	13.32	13.34	0.15	.	.
SWEDEN (SEK/KG.)	88.88	94.01	100.86	.	.	.	.
SWITZERLAND (Sw F/KG.)	17.86	18.17	18.05	17.66	-2.16	.	.
TUNISIA (D/KG.)	3.20	3.20	.	.	.	.	.
UNITED STATES (US\$/KG.)	1.05	1.10	1.16	1.22	5.17	.	.
URUGUAY (NUR\$/KG.)	167.98	314.38	457.00	800.61	75.19	1,705.22	112.99
YUGOSLAVIA (Din/KG.)	1,003.00	2,414.00	7,579.00	99,104.00	1207.61	.	.

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

COUNTRY		AVERAGE OR REPRESENTATIVE IMPORT PRICES (C.I.F.)					% CHANGE	
		1986	1987	1988	1989	1989 / 1988	1990	1990 / 1989
ARGENTINA	- EXPORT(F.O.B.)	975	1,317	1,147	1,200	4.62	.	.
	- IMPORT(C.I.F.)	.	.	.	.	.	.	.
AUSTRALIA	- EXPORT(F.O.B.)	1,932	2,262	2,531	2,669	5.45	.	.
	- IMPORT(C.I.F.)	2,087	1,745	2,827	3,181	12.52	3,317	4.28
AUSTRIA	- EXPORT(F.O.B.)	2,863	2,798	3,047	.	.	.	.
	- IMPORT(C.I.F.)	10,259	11,966	9,097	.	.	.	.
BRAZIL	- EXPORT(F.O.B.)	2,060	3,000	2,260	2,190	-3.10	.	.
	- IMPORT(C.I.F.)	1,090	1,370	1,160	1,390	19.83	.	.
CANADA	- EXPORT(F.O.B.)	1,831	2,095	2,151	2,643	22.87	.	.
	- IMPORT(C.I.F.)	2,010	2,135	2,437	2,555	4.84	.	.
COLOMBIA	- EXPORT(F.O.B.)	1,997	2,563	.	.	.	.	.
	- IMPORT(C.I.F.)	.	.	.	.	.	.	.
FINLAND	- EXPORT(F.O.B.)	940	1,050	.	252	.	.	.
	- IMPORT(C.I.F.)	6,000	.	910	396	-56.48	.	.
HUNGARY	- EXPORT(F.O.B.)	868	1,094	1,478	.	.	.	.
	- IMPORT(C.I.F.)	632	.	.	.	.	.	.
JAPAN	- EXPORT(F.O.B.)	3,110	3,630	3,200	4,800	50.00	.	.
	- IMPORT(C.I.F.)	.	.	.	.	.	.	.
NEW ZEALAND	- EXPORT(F.O.B.)	1,852	2,153	2,360	2,680	13.56	.	.
	- IMPORT(C.I.F.)	.	.	.	.	.	.	.
NORWAY	- EXPORT(F.O.B.)	2,800	2,590	5,050	4,250	-15.84	.	.
	- IMPORT(C.I.F.)	2,090	4,350	4,310	4,190	-2.78	.	.

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

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

COUNTRY		1986	1987	1988	1989	% CHANGE		1990	% CHANGE 1990 / 1989
						1989 / 1988	1989 / 1989		
PARAGUAY	- EXPORT(F.O.B.)	811	1,362	1,444	1,180		-18.28	.	.
	- IMPORT(C.I.F.)	.	.	.	.	.	.	.	.
POLAND	- EXPORT(F.O.B.)	1,198	1,113	1,190	1,680		41.18	.	.
	- IMPORT(C.I.F.)	849	.	.	1,242		.	.	.
SWEDEN	- EXPORT(F.O.B.)	1,270	1,740	1,960	2,060		5.10	.	.
	- IMPORT(C.I.F.)	4,160	4,080	4,810	5,350		11.23	.	.
SWITZERLAND	- EXPORT(F.O.B.)	600	860	930	983		5.70	.	.
	- IMPORT(C.I.F.)	6,810	5,410	5,520	6,310		14.31	.	.
TUNISIA	- EXPORT(F.O.B.)	.	.	.	.		.	.	.
	- IMPORT(C.I.F.)	1,830	.	.	.		.	.	.
UNITED STATES	- EXPORT(F.O.B.)	.	.	.	1,660		.	.	.
	- IMPORT(C.I.F.)	950	1,080	1,140	1,070		-6.14	.	.
URUGUAY	- EXPORT(F.O.B.)	999	1,392	1,047	1,152		10.03	.	.
	- IMPORT(C.I.F.)	.	.	.	.		.	.	.

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-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	1985: cow, 145.5-170 kg, North Island. From 1986 on, all cows, all New Zealand.	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, "pistoła" 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	1986	1987	1988	1989	% CHANGE		FORECAST		
					1989 / 1988	1990 / 1989	1991	1992	
ARGENTINA 3	200.0	210.0	210.0	180.0	-14.28	150.0	-16.66	180.0	.
AUSTRALIA 3	275.5	288.3	301.4	310.0	2.85	318.0	2.58	325.0	.
AUSTRIA 2	445.6	444.3	462.0	450.0	-2.59	459.0	2.00	.	.
BRAZIL 3	1,020.0	1,200.0	1,100.0	1,050.0	-4.54	1,150.0	9.52	1,160.0	.
BULGARIA 2	265.0	268.4	278.0	287.6	3.45	288.3	0.24	.	.
CANADA 3	1,097.3	1,130.8	1,190.4	1,184.1	-0.52	1,137.0	-3.97	1,160.0	.
COLOMBIA 2	93.2	93.4	96.9	101.0	4.23	103.0	1.98	.	.
EEC 3	12,399.0	12,789.0	13,314.0	13,044.0	-2.02	13,103.0	0.45	14,500.0	.
FINLAND 3	174.1	176.0	169.2	174.3	3.01	187.0	7.28	188.0	.
GUATEMALA 1	14.0	14.0	14.0	15.0	7.14	15.0	0.00	.	.
HUNGARY 2	590.7	598.0	597.0	575.0	-3.68	572.0	-0.52	.	.
JAPAN 2	1,552.0	1,582.0	1,578.0	1,596.0	1.14	1,606.0	0.62	.	.
NEW ZEALAND 3	46.4	44.5	45.5	44.4	-2.41	42.0	-5.40	45.0	48.0

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

COUNTRY	1986	1987	1988	1989	% CHANGE		% CHANGE		FORECAST	
					1989 / 1988	1990	1990 / 1989	1991	1992	
NORWAY	85.1	92.3	89.6	83.6	-6.69	83.1	-0.59	83.4	.	.
PARAGUAY 3	60.0	85.0	101.0	109.0	7.92	112.0	2.75	115.0	.	.
POLAND 2	1,401.0	1,398.0	1,478.0	1,498.0	1.35	.	.	.	.	.
ROMANIA 1	840.0	900.0	840.0	875.0	4.16	920.0	5.14	.	.	.
SOUTH AFRICA 3	111.3	107.5	112.2	120.6	7.48	122.8	1.82	124.0	127.0	127.0
SWEDEN 3	309.0	288.0	298.0	307.0	3.02	295.0	-3.90	280.0	270.0	270.0
SWITZERLAND	277.0	272.6	276.2	271.4	-1.73	270.0	-0.51	.	.	.
UNITED STATES	6,379.0	6,520.0	7,114.0	7,173.0	0.82	6,957.8	-3.00	.	.	.
URUGUAY 3	19.0	19.0	20.0	21.0	5.00	21.0	0.00	21.0	.	.
YUGOSLAVIA 2	795.0	871.0	819.0	760.0	-7.20	730.0	-3.94	.	.	.
TOTAL	28,449.2	29,392.1	30,504.4	30,230.0	-0.89	28,642.0	-5.25	18,181.4	445.0	445.0

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

COUNTRY		1986	1987	1988	1989	% CHANGE		1990	% CHANGE	1991	1992
						1989 /1988	1990 /1989		1990 /1989		FORECAST
ARGENTINA	- TOTAL 3	200.0	210.0	210.0	176.3	-16.04		146.0	-17.18	176.0	
	- PER CAPITA	6.5	6.7	6.6	5.4	-18.18		4.4	-18.51	5.3	
AUSTRALIA	- TOTAL 3	272.3	281.5	291.4	300.5	3.12		311.0	3.49	320.0	
	- PER CAPITA	17.0	17.3	17.6	17.8	1.13		18.2	2.24	18.5	
AUSTRIA	- TOTAL 2	361.5	364.5	398.5	388.0	-2.63		392.0	1.03		
	- PER CAPITA	47.8	48.1	52.4	51.1	-2.48		51.6	0.97		
BRAZIL	- TOTAL 3,4	1,051.0	1,227.0	1,081.0	1,091.0	0.92		1,165.0	6.78	1,170.0	
	- PER CAPITA	7.6	8.7	7.5	7.4	-1.33		7.8	5.40	7.6	
CANADA	- TOTAL 3	731.2	735.1	759.4	770.3	1.43		735.0	-4.58	748.0	
	- PER CAPITA	28.8	28.7	29.3	29.3	0.00		27.7	-5.46	28.0	
COLOMBIA	- TOTAL 2	90.3	95.0	96.9	101.0	4.23		103.0	1.98		
	- PER CAPITA	3.1	3.3	3.3	3.2	-3.03					
EEC	- TOTAL	12,144.0	12,429.0	12,846.0	12,665.0	-1.40		12,736.0	0.56	13,750.0	
	- PER CAPITA	37.6	38.4	39.6	38.9	-1.76		39.0	0.25	40.0	
FINLAND	- TOTAL 3	161.3	160.7	161.7	158.2	-2.16		165.0	4.29	168.0	
	- PER CAPITA	32.8	32.6	32.7	31.9	-2.44		33.2	4.07	33.6	
GUATEMALA	- TOTAL 1	14.0	14.0	14.0	15.0	7.14		15.0	0.00		
	- PER CAPITA	1.6	1.6	1.5	1.6	6.66					
HUNGARY	- TOTAL 2	213.1	201.6	194.5	186.0	-4.37		184.0	-1.07		
	- PER CAPITA	42.2	42.3								
JAPAN	- TOTAL 2	1,847.0	1,981.0	2,022.0	2,076.0	2.67		2,115.0	1.87	2,000.0	
	- PER CAPITA	15.2	16.2	16.4	16.9	3.04					

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

COUNTRY	1986		1987		1988		1989		% CHANGE 1989 /1988		1990		% CHANGE 1990 /1989		FORECAST	
	TOTAL	PER CAPITA	TOTAL	PER CAPITA	TOTAL	PER CAPITA	TOTAL	PER CAPITA	TOTAL	PER CAPITA	TOTAL	PER CAPITA	TOTAL	PER CAPITA	1991	1992
NEW ZEALAND	48.0	14.7	44.4	13.5	46.0	13.9	48.0	14.4	4.34	3.59	50.0	14.5	4.16	0.69	.	.
	86.5	20.8	87.6	20.9	84.8	20.2	80.5	19.1	-5.07	-5.44	82.2	19.4	2.11	1.57	84.6	19.9
NORWAY	60.0	16.0	85.0	22.0	101.0	25.0	109.0	26.0	7.92	4.00	112.0	26.0	2.75	0.00	115.0	27.0
	1,116.0	30.0	1,282.0	34.2	1,325.0	35.2	1,433.0	37.7	8.15	7.10	1,476.0	.	3.00	.	.	.
POLAND	700.0	30.7	750.0	32.7	710.0	30.8	715.0	30.8	0.70	0.00	740.0	.	3.49	.	.	.
	108.8	3.0	106.4	3.0	110.9	3.1	118.1	3.2	6.49	3.22	122.8	3.4	3.97	6.25	121.0	124.3
SOUTH AFRICA	263.0	31.6	266.0	31.7	279.0	33.0	267.0	31.5	-4.30	-4.54	264.0	.	-1.12	.	266.0	268.0
	287.7	43.3	284.3	42.5	282.2	41.8	283.2	41.6	0.35	-0.47	278.0	.	-1.83	.	.	.
SWEDEN	6,868.0	28.4	6,968.0	28.6	7,512.0	30.5	7,647.0	30.2	1.79	-0.98	7,302.0	29.1	-4.51	-3.64	.	.
	19.0	6.3	19.0	6.4	20.0	6.6	20.0	6.8	0.00	3.03	21.0	7.1	5.00	4.41	21.0	7.0
SWITZERLAND	848.0	37.7	858.0	37.9	829.0	36.6	721.0	.	-13.02	.	721.0	.	0.00	.	.	.
	27,490.7	28,450.1	29,375.3	29,369.1	29,375.3	29,369.1	29,369.1	29,369.1	-0.02	-0.02	29,236.0	29,236.0	-0.45	-0.45	18,939.6	.
UNITED STATES	6,968.0	28.6	6,968.0	28.6	7,512.0	30.5	7,647.0	30.2	1.79	-0.98	7,302.0	29.1	-4.51	-3.64	.	.
	19.0	6.3	19.0	6.4	20.0	6.6	20.0	6.8	0.00	3.03	21.0	7.1	5.00	4.41	21.0	7.0
URUGUAY	848.0	37.7	858.0	37.9	829.0	36.6	721.0	.	-13.02	.	721.0	.	0.00	.	.	.
	27,490.7	28,450.1	29,375.3	29,369.1	29,375.3	29,369.1	29,369.1	29,369.1	-0.02	-0.02	29,236.0	29,236.0	-0.45	-0.45	18,939.6	.
YUGOSLAVIA	27,490.7	28,450.1	29,375.3	29,369.1	29,375.3	29,369.1	29,369.1	29,369.1	-0.02	-0.02	29,236.0	29,236.0	-0.45	-0.45	18,939.6	.
	19.0	6.3	19.0	6.4	20.0	6.6	20.0	6.8	0.00	3.03	21.0	7.1	5.00	4.41	21.0	7.0
TOTAL	848.0	37.7	858.0	37.9	829.0	36.6	721.0	.	-13.02	.	721.0	.	0.00	.	.	.
	27,490.7	28,450.1	29,375.3	29,369.1	29,375.3	29,369.1	29,369.1	29,369.1	-0.02	-0.02	29,236.0	29,236.0	-0.45	-0.45	18,939.6	.

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

COUNTRY	1986	1987	1988	1989	% CHANGE 1989 /1988	1990	% CHANGE 1990 /1989	FORECAST	
								1991	1992
AUSTRALIA	0.6	0.4	-	-	.	.	.	.	.
AUSTRIA	0.3	0.7	0.8	1.1	37.50	.	.	.	.
BRAZIL 2	38.0	35.0	1.0	52.3	130.00	50.0	-4.39	.	.
BULGARIA	0.5	0.8	8.4	0.6	-92.85	.	.	.	.
CANADA 2	13.4	22.1	14.4	12.1	-15.97	11.7	-3.30	11.0	.
EEC 2	131.0	92.0	127.0	120.0	-5.51	111.0	-7.50	90.0	.
FINLAND 2	-	-	0.6	0.5	-16.66	.	.	.	.
HUNGARY	8.5	-	8.4	-	.	.	.	.	.
JAPAN 1	295.0	400.0	461.0	492.0	6.72	535.0	8.73	.	.
NORWAY	2.0	2.0	1.7	0.5	-70.58	1.4	180.00	1.1	.
POLAND 1	16.3	28.6	27.0	50.5	87.03	50.0	-0.99	.	.
SOUTH AFRICA	0.6	1.5	1.6	0.3	-81.25	1.0	233.33	0.2	1.2
SWEDEN	9.1	14.8	18.8	19.6	4.25	22.0	12.24	15.0	8.0
SWITZERLAND	5.4	5.7	3.6	3.6	0.00	3.5	-2.77	3.5	.
UNITED STATES	509.0	542.0	516.0	406.0	-21.31	414.0	1.97	442.0	.
YUGOSLAVIA 3	26.7	14.0	42.4	43.3	2.12	61.0	40.87	.	.
TOTAL	1,056.4	1,159.6	1,232.7	1,202.4	-2.45	1,260.6	4.84	562.8	9.2

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

COUNTRY	1986	1987	1988	1989	% CHANGE		1990	% CHANGE		FORECAST	
					1989 / 1988	1989 / 1988		1990 / 1989	1991	1992	
ARGENTINA	0.4	0.3	3.4	3.7	8.82		3.7	0.00			
AUSTRALIA 3	3.8	7.1	9.9	9.5	-4.04		9.5	0.00			
AUSTRIA	1.4	0.4	4.6	6.3	36.95		6.7	6.34			
BRAZIL 2	7.3	8.0	19.8	10.7	-45.95		20.0	86.91			
BULGARIA	3.6	4.1	9.9	2.6	-73.73		2.6	0.00			
CANADA 2	213.4	301.1	318.8	304.1	-4.61		301.8	-0.75	309.3		
EEC 2	358.0	436.0	562.0	537.0	-4.44		478.0	-10.98	500.0		
FINLAND 2	10.2	17.3	9.2	14.0	52.17		22.0	57.14	20.0		
HUNGARY 3	131.1	146.1	165.0	173.0	4.84		173.0	0.00			
NORWAY	0.6	4.2	10.4	5.6	-46.15		2.2	-60.71	0.0		
POLAND 3	106.0	115.7	109.8	97.7	-11.02		98.0	0.30			
ROMANIA 1	135.0	150.0	140.0	150.0	7.14		175.0	16.66			
SOUTH AFRICA	2.0	1.5	1.8	1.7	-5.55		4.0	135.29	2.0	2.7	
SWEDEN	52.7	36.4	41.0	47.6	16.09		43.0	-9.66	19.0	0.0	
SWITZERLAND	1.0	0.8	0.4	0.7	75.00		0.5	-28.57	0.5		
UNITED STATES	39.0	49.0	88.0	119.0	35.22		110.0	-7.56	120.0		
YUGOSLAVIA 3	1.2	1.4	2.4	3.3	37.50		3.0	-9.09			
TOTAL	1,066.7	1,279.4	1,496.4	1,486.5	-0.66		1,453.0	-2.25	970.8	2.7	

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

COUNTRY	1986	1987	1988	1989	% CHANGE		% CHANGE		FORECAST	
					1989 / 1988	1990 / 1989	1990	1991	1991	1992
ARGENTINA 3	350.0	400.0	400.0	360.0	-10.00	400.0	11.11	400.0	400.0	.
AUSTRALIA 3	370.1	393.5	401.7	411.0	2.31	422.0	2.67	432.0	432.0	.
AUSTRIA 2	81.6	84.1	84.2	85.3	1.30	86.0	0.82	.	.	.
BRAZIL 3	1,700.0	1,970.0	1,950.0	2,080.0	6.66	2,300.0	10.57	2,400.0	2,400.0	.
BULGARIA 2	120.4	116.5	127.9	144.8	13.21	145.0	0.13	.	.	.
CANADA 3	618.0	675.9	684.9	685.7	0.11	728.3	6.21	749.5	749.5	.
COLOMBIA 2	186.3	214.7	236.2	236.2	0.00	236.2	0.00	.	.	.
EEC	5,443.0	5,783.0	5,995.0	6,121.0	2.10	6,307.0	3.03	6,556.0	6,556.0	.
EGYPT 1	160.0	150.0	135.0	110.0	-18.51	100.0	-9.09	.	.	.
FINLAND 3	22.1	26.7	27.8	30.3	8.99	33.0	8.91	34.0	34.0	.
GUATEMALA 1	52.0	74.0	78.0	83.0	6.41	88.0	6.02	.	.	.
HUNGARY 2	439.7	470.0	503.0	508.0	0.99	521.0	2.55	.	.	.
JAPAN 2	1,377.0	1,432.0	1,443.0	1,442.0	-0.06	1,442.0	0.00	.	.	.
NEW ZEALAND	46.0	47.7	52.7	58.7	11.36	56.0	-4.59	58.0	58.0	60.0
NORWAY	13.2	14.6	17.7	19.7	11.29	20.4	3.55	20.5	20.5	.

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

COUNTRY	1986	1987	1988	1989	% CHANGE		1990	% CHANGE		FORECAST	
					1989 / 1988	1989 / 1988		1990 / 1989	1991	1992	
PARAGUAY 3	12.0	15.0	17.0	18.0	5.88	19.0	19.0	5.55	20.0	.	.
POLAND 2	307.0	314.0	331.0	340.0	2.71	300.0	300.0	-11.76	.	.	.
ROMANIA 1	455.0	425.0	370.0	365.0	-1.35	365.0	365.0	0.00	.	.	.
SOUTH AFRICA 3	510.1	535.2	546.8	548.8	0.36	552.0	552.0	0.58	555.0	558.5	558.5
SWEDEN 3	45.0	42.9	41.1	48.6	18.24	50.0	50.0	2.88	50.0	50.0	50.0
SWITZERLAND	27.5	28.7	31.4	33.1	5.41	33.0	33.0	-0.30	.	.	.
TUNISIA	40.4	41.4	46.6	47.8	2.57	47.8	47.8	0.00	.	.	.
UNITED STATES	8,263.0	9,105.0	9,428.0	10,091.0	7.03	10,772.0	10,772.0	6.74	.	.	.
URUGUAY 3	19.0	22.0	25.0	26.0	4.00	26.0	26.0	0.00	25.0	25.0	25.0
YUGOSLAVIA 1	329.0	323.0	329.0	315.0	-4.25	310.0	310.0	-1.58	.	.	.
TOTAL	20,987.4	22,704.9	23,303.0	24,209.0	3.68	25,359.7	25,359.7	4.75	11,300.0	668.5	668.5

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

COUNTRY		1986	1987	1988	1989	% CHANGE		1990	% CHANGE		FORECAST	
						1989 / 1988	1990 / 1988	1990	1990 / 1989	1991	1992	
ARGENTINA	- TOTAL 3	355.0	410.0	400.0	360.0	-10.00		400.0	11.11	400.0		
	- PER CAPITA	11.5	13.0	12.5	11.1	-11.20		12.0	8.10	12.0		
AUSTRALIA	- TOTAL 3	367.9	391.0	400.3	409.5	2.29		421.0	2.80	431.0		
	- PER CAPITA	22.7	23.7	24.1	24.3	0.82		24.6	1.23	24.9		
AUSTRIA	- TOTAL 2	93.1	102.0	101.5	105.0	3.44		108.0	2.85			
	- PER CAPITA	12.3	13.2	12.9	13.8	6.97		14.2	2.89			
BRAZIL	- TOTAL 3,4	1,464.0	1,755.0	1,701.0	1,832.0	7.70		1,950.0	6.44	2,100.0		
	- PER CAPITA	10.6	12.4	11.8	12.4	5.08		13.0	4.83	13.7		
BULGARIA	- TOTAL 2	120.0	147.0	132.0	132.0	0.00		132.0	0.00			
	- PER CAPITA	13.2	14.4	14.1								
CANADA	- TOTAL 3	654.6	701.7	735.4	726.6	-1.19		766.6	5.50	788.5		
	- PER CAPITA	25.8	27.3	28.4	27.7	-2.46		28.9	4.33	29.4		
COLOMBIA	- TOTAL 2	186.3	214.7	236.2	236.2	0.00		236.2	0.00			
	- PER CAPITA	6.6	7.8	8.5								
EEC	- TOTAL	5,229.0	5,441.0	5,706.0	5,849.0	2.50		5,987.0	2.35	6,236.0		
	- PER CAPITA	16.2	16.8	17.6	18.0	2.27		18.4	2.22	18.1		
EGYPT	- TOTAL 1	210.0	215.0	160.0	118.0	-26.25		115.0	-2.54			
	- PER CAPITA	4.3	4.4	3.0	2.2	-26.66		2.1	-4.54			
FINLAND	- TOTAL 3	22.1	26.7	27.8	30.3	8.99		32.0	5.61	35.0		
	- PER CAPITA	4.5	5.4	5.6	6.1	8.92		6.4	4.91	6.7		
GUATEMALA	- TOTAL 1	52.0	74.0	78.0	83.0	6.41		88.0	6.02			
	- PER CAPITA	6.0	8.4	8.5	8.8	3.52						

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

COUNTRY	1986		1987		1988		1989		% CHANGE 1989 / 1988		% CHANGE 1990 / 1989		FORECAST	
	TOTAL	PER CAPITA	TOTAL	PER CAPITA	TOTAL	PER CAPITA	TOTAL	PER CAPITA	TOTAL	PER CAPITA	TOTAL	PER CAPITA	1991	1992
HUNGARY	- TOTAL 2	135.2	140.0	145.0	150.0	155.0	155.0	155.0	3.44	3.33	.	.	.	.
	- PER CAPITA	22.3	22.7	.	.	.	.	.	.	.	.	.	.	.
JAPAN	- TOTAL 2	1,549.0	1,627.0	1,703.0	1,717.0	1,751.0	1,751.0	1,763.0	0.82	1.98	1.98	1,763.0	.	.
	- PER CAPITA	12.7	13.3	14.0	13.9	.	.	.	-0.71	.	.	.	.	.
NEW ZEALAND	- TOTAL 3	45.2	47.8	50.0	52.5	52.5	52.5	52.5	5.00	0.00	0.00	.	.	.
	- PER CAPITA	13.8	14.5	15.1	15.8	.	.	.	4.63	.	.	.	.	.
NORWAY	- TOTAL	14.8	15.5	17.6	18.1	20.6	20.6	21.7	2.84	13.81	13.81	21.7	.	.
	- PER CAPITA	3.6	3.7	4.2	4.3	4.9	4.9	5.1	2.38	13.95	13.95	5.1	.	.
PARAGUAY	- TOTAL	12.0	15.0	17.0	18.0	19.0	19.0	20.0	5.88	5.55	5.55	20.0	.	.
	- PER CAPITA	3.2	3.9	4.3	4.3	4.4	4.4	4.6	0.00	2.32	2.32	4.6	.	.
POLAND	- TOTAL 2	262.0	286.0	307.0	320.0	288.0	288.0	288.0	4.23	-10.00	-10.00	.	.	.
	- PER CAPITA	7.1	7.6	8.1	8.4	7.5	7.5	7.5	3.70	-10.71	-10.71	.	.	.
ROMANIA	- TOTAL 1	385.0	319.0	253.0	250.0	264.0	264.0	264.0	-1.18	5.60	5.60	.	.	.
	- PER CAPITA	16.7	13.6	11.0	10.8	11.4	11.4	11.4	-1.81	5.55	5.55	.	.	.
SOUTH AFRICA	- TOTAL 3	513.2	550.9	563.0	563.8	560.8	560.8	563.8	0.14	-0.53	-0.53	563.8	566.8	.
	- PER CAPITA	14.8	15.2	15.4	15.7	15.8	15.8	16.1	1.94	0.63	0.63	16.1	15.9	.
SWEDEN	- TOTAL 3	44.0	38.0	43.5	49.3	51.0	51.0	51.0	13.33	3.44	3.44	51.0	51.0	.
	- PER CAPITA	5.2	4.5	5.2	.	.	.	.	.	.	.	.	.	.
SWITZERLAND	- TOTAL	63.2	68.6	75.2	76.0	78.0	78.0	78.0	1.06	2.63	2.63	.	.	.
	- PER CAPITA	9.5	10.3	11.1	11.2	.	.	.	0.90	.	.	.	.	.
TUNISIA	- TOTAL	40.4	41.4	46.6	47.8	47.8	47.8	47.8	2.57	0.00	0.00	.	.	.
	- PER CAPITA	5.4	5.4	5.9	5.9	.	.	.	0.00	.	.	.	.	.

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

COUNTRY	1986		1987		1988		1989		% CHANGE 1989 / 1988		% CHANGE 1990 / 1989		FORECAST	
	TOTAL	PER CAPITA	TOTAL	PER CAPITA	TOTAL	PER CAPITA	TOTAL	PER CAPITA	TOTAL	PER CAPITA	TOTAL	PER CAPITA	1991	1992
UNITED STATES	7,966.0	33.0	8,683.0	35.6	9,063.0	36.8	9,663.0	38.9	6.62	5.70	10,328.0	41.2	6.88	5.91
	TOTAL 3	15.0	20.0	6.6	22.0	7.4	23.0	7.7	4.54	4.05	22.0	7.4	-4.34	-3.89
URUGUAY	308.0	13.7	310.0	13.7	323.0	14.3	314.0	.	-2.78	.	306.0	.	-2.54	.
	TOTAL 2	13.7	13.7	13.7	13.7	14.3	.	.	.	.	.	.	.	.
YUGOSLAVIA	20,107.0	21,640.3	21,640.3	22,307.1	22,307.1	23,144.1	23,144.1	23,144.1	3.75	3.75	24,179.5	4.47	4.47	12,432.0
	TOTAL	20,107.0	21,640.3	22,307.1	22,307.1	23,144.1	23,144.1	23,144.1	3.75	3.75	24,179.5	4.47	4.47	12,432.0

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

COUNTRY	1986	1987	1988	1989	% CHANGE		% CHANGE		FORECAST	
					1989 / 1988	1990	1990 / 1989	1991	1992	
ARGENTINA	40.0	-	-	-	.	.	.	.	.	.
AUSTRIA 1	13.6	17.9	15.1	16.9	11.92	19.0	12.42	.	.	.
BULGARIA	-	2.4	1.2	0.3	-75.00	.	.	.	.	.
CANADA 2	24.0	45.2	46.9	42.9	-8.52	48.0	11.88	49.0	.	.
EEC 2	72.0	84.0	100.0	116.0	16.00	125.0	7.75	130.0	.	.
EGYPT 1	50.0	65.0	25.0	8.0	-68.00	15.0	87.50	.	.	.
JAPAN 3	104.0	195.0	261.0	267.0	2.29	296.0	10.86	.	.	.
NORWAY	1.7	1.9	0.7	0.1	-85.71	0.2	100.00	0.0	.	.
POLAND	-	-	-	1.0	.	.	.	.	.	.
ROMANIA 1	-	10.0	7.0	7.0	0.00	10.0	42.85	.	.	.
SOUTH AFRICA 2	10.3	23.3	25.9	21.6	-16.60	18.0	-16.66	.	.	.
SWEDEN 2	1.0	0.9	1.2	1.3	8.33	1.5	15.38	1.0	1.0	1.0
SWITZERLAND 2	36.1	40.4	43.2	41.3	-4.39	46.0	11.38	45.0	.	.
UNITED STATES	3.3	3.5	3.4	5.9	73.52	6.0	1.69	.	.	.
YUGOSLAVIA	-	-	-	0.8	.	.	.	.	.	.
TOTAL	356.0	489.5	530.6	530.1	-0.09	584.7	10.29	225.0	1.0	1.0

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

COUNTRY	1986	1987	1988	1989	% CHANGE		% CHANGE		FORECAST	
					1989 / 1988	1990 / 1989	1990 / 1989	1991	1992	
ARGENTINA	-	2.8	-	-	.	.	.	.	.	.
AUSTRALIA	2.5	2.5	1.4	1.2	-14.28	.	.	.	.	.
BRAZIL 2	236.0	215.0	249.3	248.6	-0.28	300.0	20.67	.	.	.
BULGARIA	28.5	23.6	36.5	35.3	-3.28	.	.	.	.	.
CANADA 2	6.1	5.9	6.3	7.3	15.87	6.3	-13.69	5.5	.	.
EEC 2	334.0	375.0	401.0	449.0	11.97	430.0	-4.23	430.0	.	.
HUNGARY 2	155.8	196.0	240.6	180.0	-25.18	180.0	0.00	.	.	.
JAPAN	2.0	3.0	5.0	6.0	20.00	.	.	.	.	.
NORWAY	-	0.8	-	-	.	0.1	.	0.0	.	.
POLAND	12.2	15.2	15.9	17.2	8.17	14.5	-15.69	.	.	.
ROMANIA 1	60.0	110.0	125.0	120.0	-4.00	105.0	-12.50	.	.	.
SOUTH AFRICA 2	2.1	2.0	4.0	1.0	-75.00	3.5	250.00	.	.	.
SWEDEN 2	1.2	1.6	0.4	0.2	-50.00	0.5	150.00	0.5	0.5	0.5
SWITZERLAND 2	0.2	0.2	1.1	-	.	.	.	.	.	.
UNITED STATES	276.2	362.9	381.9	419.1	9.74	458.1	9.30	.	.	.
URUGUAY 2	3.6	2.1	3.0	3.0	0.00	4.0	33.33	3.0	.	.
YUGOSLAVIA 1	11.5	17.1	14.3	11.9	-16.78	10.0	-15.96	.	.	.
TOTAL	1,131.9	1,335.7	1,485.7	1,499.8	0.94	1,512.0	0.81	439.0	0.5	0.5

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

COUNTRY	1986	1987	1988	1989	% CHANGE		% CHANGE		FORECAST	
					1989 / 1988	1990 / 1989	1990 / 1989	1991	1992	
ARGENTINA 3	90.0	90.0	90.0	95.0	5.55	0.00	95.0	95.0	.	.
AUSTRALIA 3	585.0	597.0	551.3	582.5	5.65	19.21	694.4	704.1	.	.
AUSTRIA 2	3.7	4.2	4.5	4.5	0.00	0.00	4.5	.	.	.
BRAZIL 3	8.7	10.0	10.0	12.0	20.00	0.00	12.0	12.0	.	.
BULGARIA 2	116.0	115.0	115.0	115.0	0.00	0.00	115.0	.	.	.
CANADA 3	8.0	7.6	7.8	8.1	3.84	3.70	8.4	8.6	.	.
EEC 3	962.0	1,016.0	1,042.0	1,095.0	5.08	4.56	1,145.0	1,182.0	.	.
EGYPT 1	61.0	50.0	52.0	53.0	1.92	1.88	54.0	.	.	.
FINLAND 3	1.4	1.3	1.0	1.0	0.00	0.00	1.0	1.0	.	.
HUNGARY 2	8.3	7.4	3.1	3.0	-3.22	0.00	3.0	.	.	.
NEW ZEALAND 3	647.1	618.1	621.2	572.0	-7.92	-9.09	520.0	540.0	510.0	.
NORWAY	24.8	25.2	23.8	24.1	1.26	0.00	24.1	24.0	.	.
POLAND 2	30.0	29.0	26.0	22.0	-15.38	0.00	22.0	.	.	.
ROMANIA 1	67.0	63.0	60.0	65.0	8.33	0.00	65.0	.	.	.
SOUTH AFRICA 3	195.7	192.6	180.0	183.0	1.66	-2.73	178.0	173.2	176.0	.

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

COUNTRY	1986	1987	1988	1989	% CHANGE		% CHANGE		FORECAST	
					1989	1989 / 1988	1990	1990 / 1989	1991	1992
SWEDEN 3	5.0	4.8	4.7	5.3	5.3	12.76	5.5	3.77	5.0	4.5
SWITZERLAND	3.3	3.5	3.6	3.4	3.4	-5.55	3.5	2.94	.	.
TUNISIA	31.5	33.1	34.7	36.4	36.4	4.89	36.4	0.00	.	.
UNITED STATES	153.0	143.0	152.0	157.0	157.0	3.28	163.0	3.82	.	.
URUGUAY 3	70.0	53.0	50.0	70.0	70.0	40.00	77.0	10.00	69.0	.
YUGOSLAVIA 1	63.0	65.0	70.0	66.0	66.0	-5.71	63.0	-4.54	.	.
TOTAL	3,134.5	3,128.8	3,102.7	3,173.3	3,173.3	2.27	3,289.8	3.67	2,813.9	690.5

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

COUNTRY	1986		1987		1988		1989		% CHANGE 1989 / 1988		% CHANGE 1990 / 1989		FORECAST	
	TOTAL	PER CAPITA	TOTAL	PER CAPITA	TOTAL	PER CAPITA	TOTAL	PER CAPITA	%	%	1990	%	1991	1992
ARGENTINA	80.0	2.6	80.0	2.5	80.0	2.5	81.0	2.5	1.25	0.00	79.0	-2.46	79.0	2.4
	363.1	22.6	376.0	23.1	352.7	21.2	391.0	23.2	10.85	9.43	424.2	8.49	412.1	23.8
BRAZIL	26.0	0.2	12.0	0.1	12.0	0.1	12.0	0.1	0.00	0.00	12.0	0.00	12.0	0.1
	23.4	0.9	23.1	0.9	22.1	0.9	20.7	0.8	-6.33	-11.11	22.5	8.69	22.1	0.8
EEC	1,182.7	3.7	1,235.0	3.8	1,243.0	3.8	1,326.0	4.1	6.67	7.89	1,389.0	4.75	1,430.0	4.2
	67.0	1.3	57.0	1.1	56.0	1.0	58.0	1.0	3.57	0.00	61.0	5.17	.	.
FINLAND	1.4	0.3	1.3	0.3	1.0	0.2	1.4	0.3	40.00	50.00	1.4	0.00	1.4	0.3
	0.5	0.3	0.4	0.3	0.4	.	0.4	.	0.00	.	0.4	0.00	.	.
JAPAN	159.0	1.3	154.0	1.3	128.0	1.0	124.0	1.0	-3.12	0.00	120.0	-3.22	.	.
	151.8	46.3	126.3	38.3	140.0	42.3	140.0	42.1	0.00	-0.47	130.0	-7.14	.	.
NORWAY	22.5	5.4	24.5	5.9	22.0	5.2	25.8	6.1	17.27	17.30	23.8	-7.75	23.4	5.5
	5.4	5.4	5.9	5.9	5.2	5.2	6.1	6.1	17.30	17.30	5.6	-8.19	5.5	5.5

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

COUNTRY		1986	1987	1988	1989	% CHANGE		1990	% CHANGE		FORECAST	
						1989 / 1988	1990 / 1989		1991	1992		
POLAND	- TOTAL 2	38.0	36.0	29.0	22.0	-24.13		21.0	-4.54			
	- PER CAPITA	1.0	0.9	0.8	0.6	-25.00						
ROMANIA	- TOTAL 1	22.0	18.0	16.0	20.0	25.00		20.0	0.00			
	- PER CAPITA	1.0	0.8	0.7	0.9	28.57						
SOUTH AFRICA	- TOTAL 3	202.5	202.0	180.7	195.2	8.02		181.9	-6.81		186.1	190.0
	- PER CAPITA	5.6	5.4	4.8	4.7	-2.08		4.9	4.25		4.6	4.8
SWEDEN	- TOTAL 3	6.5	6.9	6.1	5.8	-4.91		6.0	3.44		6.5	6.5
	- PER CAPITA	0.8	0.8	0.7	0.7	0.00						
SWITZERLAND	- TOTAL	9.7	9.5	10.6	10.4	-1.88		11.0	5.76			
	- PER CAPITA	1.5	1.4	1.6	1.5	-6.25						
TUNISIA	- TOTAL	31.5	33.1	34.7	36.4	4.89		36.4	0.00			
	- PER CAPITA	4.2	4.2	4.4	4.5	2.27						
UNITED STATES	- TOTAL	171.0	165.0	175.0	184.0	5.14		191.0	3.80			
	- PER CAPITA	0.7	0.7	0.7	0.7	0.00		0.8	14.28			
URUGUAY	- TOTAL 3	48.0	47.0	40.0	47.0	17.50		52.0	10.63		53.0	
	- PER CAPITA	16.2	15.7	13.6	15.6	14.70		17.3	10.89		17.6	
YUGOSLAVIA	- TOTAL 2	57.0	59.0	63.0	63.0	0.00		60.0	-4.76			
	- PER CAPITA	2.5	2.6	2.8	2.7	-3.57						
TOTAL		2,666.6	2,666.1	2,612.3	2,764.1	5.81		2,842.6	2.83		2,225.6	

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

COUNTRY	1986	1987	1988	1989	% CHANGE 1989 /1988	1990	% CHANGE 1990 /1989	FORECAST	
								1991	1992
AUSTRALIA	2.0	2.0	-	2.0	.	.	.	.	.
BRAZIL	17.0	2.0	2.0	1.5	-25.00	.	.	.	.
BULGARIA	0.6	0.2	7.5	12.2	62.66	.	.	.	.
CANADA 2	16.3	15.1	7.0	12.3	75.71	13.5	9.75	13.0	.
EEC 2	249.0	259.0	248.0	258.0	4.03	256.0	-0.77	254.0	.
EGYPT 1	6.0	7.0	4.0	5.0	25.00	7.0	40.00	.	.
FINLAND 2	-	0.1	0.4	0.4	0.00	0.4	0.00	0.4	.
JAPAN 3	159.0	153.0	128.0	117.0	-8.59	113.0	-3.41	.	.
NORWAY	0.8	0.4	0.3	0.3	0.00	.	.	.	.
POLAND	0.2	-	-	-	.	.	.	.	.
SOUTH AFRICA 2	9.1	11.7	14.3	14.3	0.00	12.5	-12.58	15.0	16.0
SWEDEN 2	1.1	2.1	2.3	1.7	-26.08	1.7	0.00	1.2	1.2
SWITZERLAND 2	5.6	5.5	5.9	6.7	13.55	8.0	19.40	7.5	.
UNITED STATES	25.6	20.0	23.0	25.0	8.69	25.0	0.00	.	.
YUGOSLAVIA	-	-	-	0.1	.	.	.	.	.
TOTAL	492.3	478.1	442.7	456.5	3.11	437.1	-4.24	291.1	17.2

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

COUNTRY	1986	1987	1988	1989	% CHANGE		% CHANGE		FORECAST	
					1989 / 1988	1990	1990 / 1989	1991	1992	
ARGENTINA 2	10.0	10.0	10.0	14.0	40.00	16.0	14.28	16.0	16.0	.
AUSTRALIA 1	215.8	215.4	200.2	188.5	-5.84	237.0	25.72	.	.	.
BRAZIL	0.1	0.2	0.6	0.2	-66.66	.	.	.	.	.
BULGARIA	2.0	1.2	1.3	20.8	500.00	.	.	.	.	.
CANADA	0.1	-	-	-	.	.	.	.	.	.
COLOMBIA	0.1	0.2	0.3	.	.	.	.	.	.	.
EEC 2	5.0	6.0	6.0	7.0	16.66	8.0	14.28	19.0	19.0	.
HUNGARY	16.6	15.3	16.5	.	.	.	.	.	.	.
NEW ZEALAND 2,3	538.0	518.5	479.7	472.7	-1.45	320.0	-32.30	330.0	320.0	320.0
NORWAY	-	0.3	0.1	2.0	900.00	2.0	0.00	.	.	.
POLAND	7.9	10.3	12.7	12.4	-2.36	12.1	-2.41	.	.	.
ROMANIA 1	45.0	45.0	45.0	45.0	0.00	45.0	0.00	.	.	.
SOUTH AFRICA 2	0.3	0.2	0.2	0.1	-50.00	0.2	100.00	0.2	0.2	0.2
SWEDEN 2	-	0.1	0.1	0.1	0.00	0.1	0.00	0.1	0.1	0.1
UNITED STATES	0.8	1.0	1.0	1.0	0.00	1.0	0.00	.	.	.
URUGUAY 2	22.3	5.7	10.0	23.0	130.00	25.0	8.69	16.0	16.0	.
YUGOSLAVIA 1	3.8	6.2	5.1	4.9	-3.92	5.0	2.04	.	.	.
TOTAL	867.8	835.6	788.8	791.7	0.36	671.4	-15.19	381.3	320.3	320.3

FOOTNOTES

Table 1

- 1 1990: estimates
- 2 1990: secretariat estimates
- 3 1990-91: 1 June
- 4 1986: 1 June
- 5 In brackets: census date
- 6 Source: USDA, World Livestock Situation, March 1990

Table 2

- 1 Estimates: Bulgaria all years, others 1990
- 2 Source: USDA, World Livestock Situation, March 1990: Yugoslavia 1989-90; Austria, Japan 1990; others all years
- 3 Inspected only: Switzerland 1990; others all years
- 4 Total slaughter: Bulgaria, Colombia, Romania all years; Yugoslavia 1989-90; Argentina 1990-91; others 1990
- 5 1989-90: secretariat estimates

Table 3

- 1 Only industrial meat production
- 2 1990: estimates
- 3 Secretariat estimates: Argentina, Hungary 1990; Japan, Poland 1990-91; others 1989-90
- 4 Source: USDA, World Livestock Situation, March 1990
- 5 Total production, beef and veal: Austria, Colombia, Yugoslavia 1989-90; Argentina 1990; EEC, Japan, Poland 1990-91; others all years

Table 4

- 1 Stocks at last Saturday of last month of quarter. Stocks are largely in boneless form and figures refer only to those held in cold stores registered to handle meat for export
 - 2 1990: estimate
 - 3 Includes intervention and private stocks
- Note: stocks at the end of the year, unless otherwise specified

Table 5

- 1 Secretariat estimates: Yugoslavia, Colombia, Hungary 1989-90; Austria 1990; Switzerland 1991; others 1990-91
- 2 1990: estimate
- 3 Source: USDA, World Livestock Situation, March 1990

Table 6

- 1 Including buffaloes also
- 2 Estimate: for EEC 1989-90, all others only 1990
- 3 Excluding breeding cattle
- 4 Source (1989-90): USDA, World Livestock Situation, March 1990
- 5 1990: secretariat estimates

Table 7

- 1 Secretariat estimates: Hungary 1989-90; others 1990
- 2 Estimate: for EEC 1989-90, all others only 1990
- 3 Including also canned beef: Hungary 1989; others 1990-91
- 4 Product weight

Table 9

- 1 Including buffaloes also
- 2 Estimate: for EEC 1989-90, all others only 1990
- 3 Excluding breeding cattle
- 4 1990: secretariat estimates

Table 10

- 1 Including also canned beef: Brazil, Norway 1990; others 1990-91
- 2 Estimate: for EEC 1989-90, Poland 1990-91; all others only 1990
- 3 1990: secretariat estimates
- 4 Product weight
- 5 Source (1990): USDA, World Livestock Situation, March 1990

Tables 12, 13 and 14

- 1 See notes on pages 96-97

Table 15

- 1 Source: USDA, World Livestock Situation, March 1990
- 2 Secretariat estimates: Japan, Poland 1990; others 1989-90
- 3 1990: estimate

Table 16

- 1 Source: USDA, World Livestock Situation, March 1990
- 2 Secretariat estimates: Japan, Poland 1990; others 1989-90
- 3 1990: estimate
- 4 Total apparent consumption

Table 17

- 1 Source (1990): USDA, World Livestock Situation, March 1990
- 2 1990: estimate
- 3 1990: secretariat estimates

Table 18

- 1 Source: USDA, World Livestock Situation, March 1990
- 2 1990: estimate
- 3 Secretariat estimates: Hungary 1989-90; others 1990

Table 19

- 1 Source: USDA, World Poultry Situation, January 1990: Yugoslavia 1990; others all years
- 2 Secretariat estimates: Austria, Hungary 1989-90; others 1990
- 3 1990: estimate

Table 20

- 1 Source: USDA, World Poultry Situation, January 1990
- 2 Secretariat estimates: Japan, Poland 1990; others 1989-90
- 3 1990: estimate
- 4 Total apparent consumption

Table 21

- 1 Source: USDA, World Poultry Situation, January 1990: Austria 1990; others all years
- 2 1990: estimate
- 3 1990: secretariat estimates

Table 22

- 1 Source: USDA, World Poultry Situation, January 1990: Yugoslavia 1990; Romania all years
- 2 1990: estimate

Table 23

- 1 Source: USDA, World Livestock Situation, March 1990: Yugoslavia 1989-90; others all years
- 2 Secretariat estimates: Hungary 1989-90; others 1990
- 3 1990: estimate

Table 24

- 1 Source: USDA, World Livestock Situation, March 1990: Yugoslavia 1989-90; Poland 1990; others all years
- 2 Secretariat estimates: Hungary 1989-90; Japan 1990
- 3 1990: estimate
- 4 Total apparent consumption

Table 25

- 1 Source: USDA, World Livestock Situation, March 1990
- 2 1990: estimate
- 3 1990: secretariat estimates

Table 26

- 1 Source: USDA, World Livestock Situation, March 1990: Romania all years; others 1990
- 2 1990: estimate
- 3 Product weight