

**GENERAL AGREEMENT  
ON TARIFFS AND TRADE**

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**Arrangement Regarding Bovine Meat**

**MEAT CONSUMPTION TRENDS**

**Note by the Secretariat**

1. At the twenty-seventh meeting of the Meat Market Analysis Group, held on 15-16 June 1994, participants agreed to reply to the following questionnaire on a voluntary basis.

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2. In recent years, meat consumption trends in industrialized countries, and more recently in some developing countries, have been characterized by a move away from red meat consumption, in particular beef and veal, to white meats, especially poultry meat. In the last two meetings of the MMAG, several participants expressed their interest to initiate a discussion regarding meat consumption trends in some detail. The Secretariat has accordingly prepared the following set of questions to serve as the basis for discussion, possibly at the next December meeting.

3. It is suggested that participants reply to the questions to the best of their ability and forward the reply to the Secretariat by 30 September 1994, at the latest. The Secretariat will then try to compile the answers for circulation before the December meeting.

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**Questions**

1. Is meat the major source of animal proteins in your country? How does it compare with other animal protein sources such as fish? Have there been any changes in the relation of the consumption of meat and other animal proteins? Why?

2. Which type of meat has traditionally the consumers' preference in your country? Why?

3. Do meat consumption *trends* in your country correspond to the general trend described above, i.e. a shift away from red meat consumption to white meat, in particular poultry meat? Please provide evidence.

4. Which factors among those cited above (and/or others) affected beef and veal consumption the most in your country? Please elaborate. For example, the following factors and their changes are frequently identified as significantly affecting beef and veal consumption: beef prices; disposable household income; relative prices of other meats; population growth; age structure of the population;

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health considerations (including those related with production methods); product image; animal welfare concerns. What is the role of those factors? What other factors are relevant?

5. Is there any relationship between beef trade and domestic beef consumption in your country? Please elaborate.

6. Are there any policies or other measures in force directed at affecting beef consumption and/or retail beef prices in your country? In the affirmative, please describe the type of measures and the rationale behind them.

7. Are there other types of measures designed to stimulating meat consumption (promotion campaigns in fairs, audiovisual promotion, particular marketing techniques)? For all types of meat or for a particular type of meat? Please specify.

8. Retail trade practices are changing fast in a rising number of countries. Butcheries are being affected by competition from supermarkets and hypermarkets. Is this the case in your country? How is it affecting meat consumption in general, and beef and veal in particular? Is meat quality being affected?

10. Is the catering market an area of expansion in your domestic market? How does it affect the consumption of the different types of meat?

11. Could you forward to the Secretariat any study/document, official or non-official, which your authorities believe might be helpful for a better assessment and understanding of meat consumption trends in your country?