

GENERAL AGREEMENT ON TARIFFS AND TRADE

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Situation and Trends in Poland's Bovine Sector

(Information furnished by Poland)

The Polish delegation presents information on the present situation in the meat market and estimates for 1979, in regard to production and trade.

In 1978, the livestock population increased in comparison with the low level recorded in 1976. The relevant figures are as follows:

(million head)

	June 1976	June 1977	June 1978	% 1978:76
Cattle	12,879	13,019	13,097	101.7
of which cows	5,989	6,008	6,080	101.5
Swine	18,847	20,051	21,675	115.0
of which sows	1,760	2,224	2,253	128.0
Sheep	3,430	3,934	4,237	123.5
Horses	2,150	2,062	.	.

In 1978 the individual sector of agriculture had approximately 73 per cent of the total cattle and swine and approximately 67 per cent of the sheep.

Purchases of live animals in the past two years were as follows:

('000 tons)

	1977	8 months 1977	8 months 1978
Total carcass weight	<u>2,269</u>	<u>1,504</u>	<u>1,659</u>
of which (live weight):			
- Cattle for slaughter	1,270	830	794
- Calves	48	39	40
- Swine	1,629	1,079	1,279

Slaughterings were as follows (live weight in 1977, carcass weight in 1978 because of unavailability of official statistics):

('000 tons)

	1977	8 months 1978
Cattle for slaughter and calves	1,378	600
Swine	1,983	998
Sheep	48	.
Poultry	459	.

Per capita consumption of meat was as follows:

(kilograms)

	1977	1978 (estimates)
Total	<u>68.5</u>	<u>70.0</u>
of which:		
- Pork	32.4	33.5
- Beef and Veal	22.5	17.1
- Poultry	9.3	12.4

Imports were resumed this year at the beginning of the third quarter, but for the year as a whole will not exceed 60,000 tons (product weight). The relevant figures are as follows:

('000 tons, US\$ million)

	1977		1978 (9 months)	
	Quantity	Value	Quantity	Value
Beef and Veal	76.9	89.4	8.8	10.8
Pork	21.5	27.1	4.3	4.7
Live swine	-	-	13.5	13.4

Exports were as follows in the past two years:

	1977		9 months 1978	
	Quantity	Value	Quantity	Value
Cattle and calves (thousand head)	150.5	39.1	153.9	45.9
Sheep for slaughter and for fattening (thousand head)	229.3	9.7	170.2	8.3
Beef and veal (thousand tons)	17.8	31.7	17.8	30.8
Pork (thousand tons)	2.9	6.6	1.2	3.8
Poultry	17.8	33.6	6.6	11.0
Bacon	13.5	23.2	11.0	19.8
Tinned hams	37.6	115.7	30.7	104.6
Meat preserves	21.3	37.0	15.2	30.0
Horsemeat	15.7	21.5	11.6	19.5
Horses for slaughter	31.9	53.3	23.3	44.1

Exports are stable and no increase is expected in 1979.

In the bovine sector, which is of particular interest to us, we see no possibility of increasing our cattle and meat sales, because of weak demand in Europe which is likely to continue next year. Indeed, there has been an appreciable deterioration in the market and in demand for preserves, whether of beef or pork.

Our country intends to further intensify livestock production, but it must be underlined that this is a difficult and costly task in view of the very difficult conditions that agriculture is encountering after a fifth consecutive year of poor harvests.

Assessment of the world meat market

It seems to us that the brief assessment made of the international market in April was correct, particularly as regards barriers to trade which are still maintained without any spectacular change. The only positive signs, though not in the nature of trade liberalization, are the recent increases in quotas for the United States and Japan.

Nevertheless, we are awaiting with impatience the results of the Tokyo Round negotiations and the conclusion of a meat arrangement which might help to achieve free and orderly trade in the years to come.