GROUP ON MEAT

Note by secretariat		L/1772
Redraft of concluding Section (E & F)		Spec(62)134
Statistics		Spec(63)193
Note on developments in trade		Spec(63)200
Estimated volume of exports from non members countries		Spec(63)207
Points for discussion (E & F)		Spec(63)208/Rev.1
Draft summary record - discussion 1-5 July 1963		Spec(63)224
Elements for consideration in negotiations		Spec(63)308
List of products		Spec(64)84
Draft report		Spec(64)87
Idem - alternative text by UK and New Zealand		Spec(64)87/Add.1
Redraft of Draft report		Spec(64)89
List of products		Spec(64)84
Data on trade flows and trade measures		Spec(64)131/Rev.1
Questions for examination (F only)		--
Note on agricultural policies in selected countries		Spec(65)121
Statistics		Spec(65)123
Programme of work		Spec(65)128
Draft working document		INT(66)471/Rev.1
Proposals for a general arrangement (1966)	(SECRET)	--
Proposals for a general arrangement (final)	(SECRET)	INT(66)576
Proposals for a general arrangement (suppl.)	(SECRET)	INT(66)577
Draft - elements to be considered for inclusion in general arrangement (E & F)	(SECRET)	--
Note by Director-General (E & F)	(SECRET)	INT(66)627

GENERAL AGREEMENT ON
TARIFFS AND TRADE

RESTRICTED

L/1772
21 May 1962

Limited Distribution

GROUP ON MEAT

Note by the Secretariat

The Council at its session from 22 to 28 February 1962 agreed to establish a Group on Meat composed of Argentina, Australia, EEC, New Zealand, United Kingdom, United States and Uruguay.

The terms of reference of the Group are those set down by the Ministers in their recommendations in respect of trade in agricultural products: "to establish the basis for the negotiation of practical measures for the creation of acceptable conditions of access to world markets". The Council agreed that in the first instance the problems to be studied by the Group would relate to trade in meat of cattle and sheep. It was, however, understood that during the course of the work of the Group it might be found desirable to vary somewhat the scope of the study, for example by examining also the market situation in some related products, in which case other countries principally interested in the trade in those products might be asked to join the Group.

The Council agreed that the secretariat should prepare for distribution a factual paper on international trade in cattle and sheep meat, including appropriate references to the findings of Committee II. It was also agreed that governments should be asked to study the paper and submit to the Executive Secretary any suggestions for overcoming any short or long term problems affecting the marketing of such meat.

TROPICAL PRODUCTS

International Trade in Cattle and Beef and Veal

I. Introduction

The present paper has been drawn up to provide a factual background, in outline rather than in detail, of the trends and most recent developments in the production, trade and consumption of beef and veal, and mutton and lamb in the countries principally concerned as importers or exporters of these products.

In considering these developments the paper draws attention to the government policies, including tariff and non-tariff measures, which may influence the direction and magnitude of such developments. The methods through which government policies are implemented are also described in a general manner. The information given is derived mainly from data provided in Committee II consultations, brought up to date by reference to published sources of information.

The paper, while not attempting to draw specific conclusions as to the effects of the agricultural policies described, draws attention to the possible impact of these policies on the level of prices, production and consumption in certain countries; the possibility of such policies influencing shifts in production from one agricultural sector to another; and finally their impact on the economics of countries highly dependent on the export of the products covered by the paper and hence the indirect effects on world trade as a whole.

Attention is drawn to the limits within which this paper has been prepared. Thus, only two sectors of the meat market have been dealt with and trends in trade and developments in agricultural policies affecting competitive meat products have been touched on only very indirectly. In addition, it will be recognized that government policies in relation to the production of such commodities as coarse grains and dairy products can have a very important effect on meat production incentives. The paper does not attempt to assess the degree to which resources have, or have not, been diverted from other sectors of production to the production of meat.

II. Consumption and Supplies of Beef and Veal in the Main Importing European Countries

Domestic production provides the major part of total beef and veal supplies in most countries. Less than 5 per cent of total beef production enters into world trade. While the United States accounts for a considerable share of world imports, the trade is mainly directed towards Western European countries. Of these countries, the United Kingdom is by far the most important importer, but Germany and Italy also provide valuable markets for the exports of Argentina, Uruguay, Australia and New Zealand, the principal non-European suppliers.

Fresh meat represents an important item in consumers' expenses for food products in high income countries. The demand for meat is more responsive to increases in incomes than for most other foodstuffs. In particular, for countries like Italy, where the level of consumption is still relatively low, and Germany, the expenditure on meat tends to increase as fast as total private expenditure.

However, the effects upon the consumption levels of increases in incomes may be offset by an adverse movement in retail prices. The levelling off in per capita consumption of beef and veal which took place in 1958 and 1959 in several European countries, for instance in Germany and France, seem to have been linked with the large increases in beef prices experienced by these countries. Similarly, the relative prices of beef and veal compared with those of mutton and lamb or pork, and more recently of poultry, have had a significant influence on the development of beef and veal consumption during the last decade.

Situation in the United Kingdom

In the United Kingdom, the total consumption of meat increased by about 7 per cent between 1954, the last year during which meat was rationed, and 1957. During this period, the consumption of pig meat, mutton and lamb remained practically unchanged, whereas consumption of beef and veal rose by more than 20 per cent.

Contrary to what happened immediately after the end of food rationing, the total consumption of meat declined slightly between 1957 and 1959 and recovered in 1960 to a level exceeding by only 1 per cent that of 1957. Developments during this period illustrate the influence of prices on consumption especially as regards the meat consumed as unprocessed carcase meat[1] (i.e. excluding bacon and ham, sausages, other prepared meat, canned meat and offals). A substantial rise in retail prices (more than 10 per cent) for beef and veal was accompanied by a decline by about 8 per cent in consumption. By contrast, for mutton and lamb stable prices were accompanied by a rise of about 10 per cent in demand, and for poultry a substantial decline in prices was correlated with a large increase in consumption.

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[1] The information given in this paragraph is taken from the calculations made regularly by the National Food Survey Committee.

In 1961, in spite of a significant decline in wholesale prices, there are indications that the retail prices of beef and veal did not change much, nor did the quantities consumed.

Production of beef (see Table 1) fell by 6 per cent between 1954 and 1955, but thereafter showed no substantial variation until 1961, except for 1959 when production fell sharply owing to a number of factors of which the most significant was a sharp fall in imports of cattle for fattening from the Irish Republic. The latter was a consequence of the health regulations imposed on imports of such cattle following the completion of the tuberculosis eradication campaign in the United Kingdom. There was, however, a heavy fall in imports from the traditional exporting countries from 1958 onwards, as a result of the emergence of the United States as a market for beef and of the fall in the exportable surplus of chilled beef in the Argentine. The lower quantities available for consumption as a result of these movements led to the increase in wholesale, and retail prices referred to earlier.

In 1961 home production increased substantially (by 10 per cent) due partly to increased shipments of live cattle for fattening from the Irish Republic. Wholesale prices fell substantially, due partly to the increased level of supplies of beef and also, among other factors, to the heavy supplies both of lamb and poultry which were available. The low level of prices was no doubt one of the factors which led to a further reduction in imports from the traditional suppliers.

In 1961 the proportion of total beef consumption represented by fresh beef increased considerably as a result of the higher home production and higher imports of fat cattle and fresh beef from the Irish Republic. As a result wholesale prices of fresh meat fell by about 15 per cent compared to 4 per cent for chilled and 15 per cent for frozen beef. The share of frozen and chilled beef in the United Kingdom market continued to decline also as a result of the continued fall in the Argentine exports of chilled beef and the continued trend of Australian and New Zealand beef exports to be diverted to the United States market.

Situation in Germany and Italy

Largely due to the rapid rise in incomes and to a high income elasticity for meat, the consumption of beef and veal (see Table 1) increased rapidly in both countries during the last decade, especially in Italy where consumption rose faster than gross national product during recent years (between 1955 and 1960 consumption rose by 43 per cent, gross national product by 33 per cent). In Germany consumption continued to rise fast in Germany, where the rate of 4 per cent per year experienced since 1955 seems to have been [illegible]. In Italy where consumption had for several years been rising at [illegible] annual rate of 8 per cent, an increase of 4 per cent was experienced in [illegible].

German imports of beef and veal show large year to year variations depending on quotas allowed in connexion with the development of domestic production. Imports of live cattle, mainly from Denmark, have increased considerably over the past few years and this trade, which has been subject to only minor variations, has now reached substantial proportions. In 1960, for example, Germany imported 473,000 head of cattle. In Italy imports rose steadily during the fifties to reach a level of 137,000 tons in 1960, (210,000 tons including 73,000 tons of meat from slaughter of imported cattle), which represents more than 20 per cent of total supplies. In 1961, imports declined sharply in Italy to the level of about 55,000 tons (114,000 tons including 59,000 tons from slaughtering of imported cattle). Italian production which had remained stable in 1959 and 1960 rose by about one-fifth in 1961, no doubt as a result of the reconversion of the cultivation methods of agricultural undertaking which have had to re-orientate themselves towards an increase in the production of feed crops and therefore in the direction of an increase in the meat production. There is no doubt that the adoption of a minimum price system has facilitated such a reconversion.

III. Situation in the Main Overseas Exporting Countries

After a substantial increase which reached a peak in 1957 or 1958 the production in the four main overseas exporting countries - Argentina, Australia, New Zealand and Uruguay - declined sharply, especially in Argentina and Australia where the 1960 levels were respectively 25 per cent and 29 per cent lower than in 1958 (see Table 2). This movement seems to be mainly the result of excessive slaughterings during the period 1956-58. This led to a reduction in exports and simultaneously to a decrease in domestic consumption following rising consumer prices.

Traditional markets for the exports of the four main exporting countries were affected not only by the reduction in supply, but also by the emergence since 1957 of the United States as a large importer. While the United States was a net exporter of about 20,000 tons in 1956, net imports reached an average level of nearly 200,000 tons in the period 1959-61. The demand for imports existing in the United States was met mainly by shipments of boneless frozen beef for manufacturing purposes from New Zealand and Australia (see Table 4). This new trade flow led to a diversion of the limited supplies available for export in these two countries from the United Kingdom to the American market where much higher prices could be obtained. Import prices of frozen beef increased by more than 50 per cent, in the United States as well as in the United Kingdom, during the period 1956-60 (see Table 5).

Argentina and Uruguay, for which health regulations practically prevent exports of carcass meat to the United States market, continued to export mainly to European destinations. The price of chilled beef exported by these countries increased by 30 per cent between 1956 and 1960, i.e. significantly less than prices of frozen meat exported from Oceania (see Table 5).

TROPICAL PRODUCTS
With no emphasis barred

From information available it seems that increases in production have occurred recently in Australia[1] and New Zealand, and exports in 1961 have risen by at least 10 per cent (see Table 3). In Argentina, cattle marketings increased by nearly 15 per cent during 1961, but there was an important decline in the average slaughter weight because of drought and there are indications that domestic consumption is again increasing, so that export supplies were further reduced by nearly 15 per cent. Uruguayan exports declined from the high level achieved in 1960.

It may be noted that during the period of short supplies which started around 1957, new exporters were able to enter the main import markets and to take a significant share of these markets (see Table 6). Overseas countries, such as South Africa and Rhodesia were able to start supplying the United Kingdom market in 1958, and their exports reached 12,000 tons in 1960 and 15.6 thousand tons in 1961. Similarly, European countries like Yugoslavia and particularly France, with the aid of export subsidies, expanded considerably their exports to the United Kingdom, Germany and Italy.

Among these new exporting countries special mention of France seems to be necessary. As was the case for the main exporting countries, French production has been subject to cyclical fluctuations (see Table 2). After a peak reached in 1955 - when net exports amounted to 50,000 tons - French production declined to a level about 10 per cent lower in 1958, and the net exports were replaced by net imports of nearly 20,000 tons. Since 1958, production has again been rising and the 1955 level was exceeded in 1960, between 1960 and 1961 a further increase by one tenth took place.[2] This led to the reappearance of an export surplus of 35,000 tons in 1960 and about 30,000 tons in 1961 (see Table 3).

IV. Brief Notes on the Trade in Mutton and Lamb

World trade in mutton and lamb is dominated by the imports of the United Kingdom originating in New Zealand and to some extent in Australia and Argentina. New Zealand exports rose by 20 per cent between 1958 and 1960 to reach the level of 345,000 tons while those from Australia and Argentina remained stable. Prices of imported mutton and lamb in the United Kingdom did not fluctuate widely between 1954 and 1960 except for a rise in 1957 due largely to short supplies in New Zealand and for a fall in 1959 as a result of a large increase (by about 30 per cent) in United Kingdom production between 1958 and 1959 following three years of stable production.

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[1] The Australian delegation has indicated that exports increased by 13 per cent in 1961 and for the eight months ended February 1962, were 132,000 tons compared with 82,000 tons for the eight months to February 1961. Production, in Australia, for the seven months ended January 1962, was 468,000 tons compared with 341,000 tons for the seven months to January 1961.

[2] During recent years the Government's agricultural policy tended to favour beef production.

After some decline in 1960, United Kingdom production in 1961 reached a record level. According to the 1962 Price Review there was a 10 per cent increase of production in the year ending March, 1962, over that in the year ending March, 1961. In 1959 imports were also higher, those of New Zealand being 40,000 tons more than in 1958. The major factor which led to the marked increase in United Kingdom production in 1959 was drought conditions which resulted in large numbers of sheep having to be marketed earlier than usual owing to lack of feed. This had a severe effect on prices. This drought also incidentally resulted in United Kingdom production being lower and price levels higher in 1960.

In 1961 prices of New Zealand mutton fell again to a level similar to that of 1959 in conjunction with a further increase in United Kingdom production. Contrary to what happened in 1959, the volume of exports from New Zealand failed to expand. Imports into the United States and Japan[1], which started to become significant after 1959, did not rise sufficiently in 1961 to compensate for the decline in United Kingdom imports.

V. Principal Barriers to Trade

Many of the developments in the production of meat and to some extent changes in trading patterns, which have been described in the foregoing paragraphs, can be related to government policy measures designed either to protect the domestic producer from external competition, to stabilize or support producers' incomes, or to stimulate domestic production. These policy measures generally involve the maintenance of direct barriers to trade in meat, but in addition, their effects on production and consumption can have far-reaching consequences for the meat trade of exporting countries.

The Group on Meat will, no doubt, wish to refer to the information supplied by consulting countries during Committee II consultations. As the Committee II reports were prepared some time ago later information on policies employed in some of the more important importing countries is given below.

United Kingdom

Meat production is supported primarily through the deficiency payments system which ensures a certain level of return to producers. In addition there are special production grants: the cattle subsidy scheme (which is designed to encourage retention for breeding of the right type of calf) and hill cattle and hill sheep subsidies which give special assistance to producers in hill areas. The Government's policy has been to encourage production of the quantity and quality of fat stock demanded by the market.

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[1] Imports into these two countries were as follows (in thousand metric tons):

	1957	1958	1959	1960	1961
United States	1.6	10.5	25.0	21.9	(25)
Japan	-	-	3.2	18.1	(22)

Under the deficiency payments system the United Kingdom does not apply quantitative restrictions on imports of cattle and sheep meat. The relevant United Kingdom customs duties are shown in Table 11. Imports under the British preferential system are admitted free from duty.

The hill cattle and hill sheep subsidy scheme aims at facilitating the rehabilitation of the hill farming industry by improving rough grazing land and at the same time encouraging the production of store livestock. The subsidy payments made under this scheme amounted in 1959-60 to £4.1 million, in 1960-61 to an estimated £5.3 million and in 1961-62 to an estimate of £5.7 million.

Under the calf subsidy scheme, subsidies payable on calf rearing amounted to £16.5 million in 1959-60 and increased to £17.6 million in 1960-61 and to an estimated £18.2 million in 1961-62.

The guaranteed price for fat cattle was raised from 157/- per live cwt. in 1960-61 to 167/- in 1961-62. For 1962-63 the guaranteed price will remain unchanged, but its application will be modified to encourage the sale of cattle at strict quality standards. The guaranteed prices relate to domestic cattle and are also paid at reduced rates to cattle imported from Ireland and fattened in the United Kingdom for not less than three months.

The guaranteed price for fat sheep and lamb was decreased in 1960-61 from 3/5½d. per lb. to 3/3d. per lb. Under the 1962-63 Price Review the guarantee will be decreased to 3/2d. per lb. and here again the maximum weights on which guarantees will be paid have been reduced. It was noted in the 1962-63 Review that the unit rate of subsidy on mutton and lamb is running at about 60 per cent of market value, the highest rate for any guaranteed commodity.

Price developments on the United Kingdom market have caused substantial increases in the total deficiency payments granted. The expenditure for fat cattle and fat sheep in recent years were the following:

	1957-58	1958-59	1959-60	1960-61	1961-62
			(£'s million)		
Cattle	34.1	12.5	3.4	12.3	46.3
Sheep	11.7	11.7	25.3	11.6	30.6

It is understood that the United Kingdom Government has requested the principal supplying countries to pay special regard to the state of the United Kingdom market in 1962 in view of the high degree of instability for all kinds of meat in that market.

United States

The United States, which is the second largest importer of meat, as well as being the largest producer, does not apply a price support system for meat, nor does it employ quantitative restrictions. Tariff rates on beef and veal, but not on mutton and lamb, are bound in GATT. The relevant customs duties applied by the United States are set out in Table 11.

Federal Republic of Germany

In the Federal Republic of Germany there are no direct price guarantees for meat. Prices on the domestic market are established freely, but in order to keep producer prices stable and at a remunerative level, imports are regulated by the Livestock and Meat Import Storage Agency. Imports are allowed in accordance with the annual supply programme. When domestic supplies are scarce and prices decline unduly, the Storage Agency intervenes on the market and stores the excess quantities at government expense.

Imports of poultry meat are not subject to the import agency.

Italy

Until 1959 the tariff level provided the only protection and no special support measures were taken for meat. In March 1959 the Italian Government changed the import regime with a view to promoting domestic cattle raising. Minimum price arrangements are applicable to imports of certain types of beef and veal and live cattle. Imports are suspended when the average domestic price of certain types of beef and veal on a number of representative markets is lower than 30,500 lires per 100 kgs., or when the average price of certain types of live cattle on a number of representative markets is lower than 13,500 lires per 100 kgs. In September 1961 the borders were closed for imports of beef and live cattle. According to recent information, the Italian Government has decided to abandon the system of minimum prices and to apply a quota system on imports of beef.

A quota of 9.5 thousand tons has been opened, but it is not clear whether it is intended that this should be the only quota to be opened before the end of the year.

France

In France target prices are established together with floor and ceiling prices. When the floor prices are reached market interventions are effected by a Government agency - SIBEV - which purchases and stores meat. Target prices for beef have been increased considerably since 1957 as part of an agricultural plan aimed at improving net farm income and the expansion of livestock production. The target prices for first quality beef increased from NF.3.01 per kg. in 1956-57 to NF.4.65 per kg. in 1961. When the internal market in recent years could not fully absorb the increased output of beef, sales for export of Government held stocks were effected at prices lower than the domestic target price. Imports of meat which had been liberalized in January 1959 have since August 1960 again been subject to import restrictions. Imports from the EEC countries are subject to minimum price arrangements.

Belgium

In Belgium target prices as well as ceiling and floor prices are established. The ceiling price for bovine cattle varies quarterly and averaged in 1960, B.Frs.26.81 per kg. on the hoof. The floor price for cows killing out at 50 per cent amounted to B.Frs.16 per kg. on the hoof. For sheep the target price in 1960 amounted to B.Frs.20 per kg. on the hoof, the ceiling and floor prices were respectively B.Frs.22 and B.Frs.16. To ensure that these target prices are reached, the Government, through an agency - OCmA - intervenes on the market through buying and selling operations. In the period from May to August 1960 it was necessary to export calves and veal with the help of export subsidies averaging B.Frs.566 per calf and B.Frs.8.38 per kg. of veal. Except for foals and foal meat, imports of meat are liberalized but some products are subject to an import licensing tax which is determined

on the basis of the difference existing between the price level prevailing on the international market and the internal target price of the product concerned. The licensing tax for beef and veal at present amounts to B.Frs.7.50 per kg., for heifers to B.Frs.5.50, for bulls to B.Frs.3.00 and for live calves to B.Frs.2.50. It should be mentioned however that such imports of fresh meat from bovine cattle are nil and that Belgium is only interested in imports of frozen meat from bovine cattle intended for processing and such imports which are not subject to licensing taxes amounted to 7,000 tons in 1960.

Sweden

In Sweden there are no guaranteed prices for meat, but certain price limits have been established. As long as the domestic price remains within these limits, imports are in principle free and the import levy, some examples of which are mentioned in Table 11, is unchanged. If the price falls below the lower limit, the import levy is increased or quantitative restrictions are applied. If the upper limit is exceeded the import levy may be reduced or other appropriate measures may be taken.

The price limits fixed are the following:

Beef	396 - 504	Sw.Crs./100 kgs.
Veal	454 - 614	" "
Mutton	453 - 613	" "

Switzerland

In Switzerland indicative prices are fixed for the various categories of cattle for slaughter. For example, the average indicative price (live weight) for first quality heifers and steers was Sw.Frs.3.175 per kg. in 1956 with upward or downward variations of 10 centimes per kg. Imports of cattle for slaughter and imports of meat are both subject to quantitative restrictions. Import licenses are granted to the extent necessary to prevent prices from exceeding the upper limit of the indicative price. When prices fall below the lower limit, importers are required, under certain conditions, to participate to a "reasonable extent" in the disposal of the surplus.

EEC

In conformity with the decision made by the Council of the EEC in respect of the common agricultural policy, on 14 January 1962, the Commission is called upon to submit to the Council in the near future a proposal relating to a common organization of the market for meat from bovine cattle. The Council proposes subsequently to reach a final decision prior to 31 July 1962. No proposal has yet been made in respect of a common policy concerning mutton and lamb, and no such proposal is to be made in the near future.

VI. General Review of Barriers to Trade

All important importing countries apply customs duties on imports of meat. Examples of tariffs applied in selected importing countries are given in Table II. Tariffs on imports of meat and meat products are, in most instances, higher than the duties on live cattle and sheep, thus allowing for a somewhat higher protection for domestic slaughtering and meat manufacture. Although most exporting countries will probably not regard tariffs as the major obstacles to their trade, it is to be noted that few of the important meat importing countries have undertaken tariff bindings in respect of meat. In this connexion it may be noted also that the EEC member States in establishing their Common External Tariff withdrew their previous concessions on meat.

Of the forty countries examined by Committee II, all but seven apply some form of non-tariff measures in respect of beef or mutton. Of the countries which rely solely on tariff measures, six are under-developed countries which for various reasons are not important meat markets and which seem to apply a tariff on meat mainly for revenue purposes.

The various systems which are designed to stabilize or support producers' incomes vary from country to country and are generally of a complex nature. These systems either directly support the income of producers or indirectly assist them by measures affecting prices, either aiming at a certain guaranteed price level or some unspecified target price.

Some countries apply over and above, in place of customs duties, variable import levies with a view to stabilizing or maintaining prices at a desired level. Examples are the variable import levy in Sweden, the equalization levy in Austria and the Netherlands, and the licensing tax in Belgium.

Quantitative import restrictions are, however, the most widely used device for the direct support of prices. In twenty-eight of the countries which have consulted in Committee II, imports of meat or some types of meat, are subject to quantitative restrictions; in some countries these are applied by means of state-trading or monopolistic agencies and they are sometimes applied in a discriminatory manner. In some of the countries concerned, imports are permitted only when domestic prices reach a certain ceiling or when an annual supply programme shows that domestic production may fall short of anticipated consumption. In other countries import restrictions are supplemented by direct government intervention on the market through purchases and storage operations effected through the intermediary of a governmental or monopolistic agency, when prices fall below a certain level. The financial implications of such purchase and storage operations may be considerable and constitute themselves a substantial indirect aid to producers' incomes.

It was found further that roughly one-third of the countries which consulted in Committee II provide government subsidies or some other form of government support. In some cases governments also intervene in the market to assist the promotion of exports either by means of direct export subsidies or through sales for export of government-held stocks at prices lower than the domestic support price.

AGRICULTURAL PRODUCTS
Work no longer under GATT

Government subsidy schemes need not be supplemented by restrictions on imports. For instance, the deficiency payments system in the United Kingdom is not supplemented by import restrictions. One of the consequences of such a system, however, is that a decline in prices can cost the government a substantial sum in meeting the wider gap between market prices and guaranteed prices.

It should finally be noted that the government support systems are applied in some instances in such a way as to promote a shift from the production of other commodities to the production of beef or mutton.

VII. Conclusions

Beef and Veal

In reviewing the development of the world beef and veal situation since the early 1950's, it seems apparent that cyclical fluctuations in production have played an important role in the development of the world beef and veal situation. It would require, however, a much more detailed analysis to establish to what extent cyclical movements have been themselves influenced by government support policies, especially in relation to the recent upward movement of production in Western Europe.

With this reservation noted, it may be useful to consider the cyclical movements in three different areas, namely Western Europe, the United States and the four main overseas exporters (see Table 7). In Western Europe, national cyclical movements, out of phase with one another, in combination resulted in a total production which remained practically constant during the period 1954/55 to 1959/60, but started to increase rapidly in 1960/61. Here again, more study would be needed to predict what the duration of the present ascendant tendency will be. In the United States a peak in production was reached in 1956 and, after a trough in 1958 and 1959, production in 1961 exceeded the preceding peak. Finally, the production of the four main exporters began to decline in 1958 and started to recover only in 1961. As a result of these divergent movements in importing and exporting areas, some imbalance in the world meat situation appeared in 1957 with the reduction of domestic production in the United States, and became more serious in 1958 when production of overseas exporters started to decline. In 1961, however, the balance began to swing in the opposite direction with the simultaneous trend toward increased production in the United States, Western Europe and major exporting countries in the Southern hemisphere.

As has been noted, prices of beef and, particularly, of frozen beef, increased considerably between 1957 and 1960. It seems probable that the general increase in production which has occurred in European countries since 1960 and 1961 is at least partly related to the shortage of world supplies and to the corresponding rise in world prices experienced during the immediately preceding years. In other words it has been found desirable to transfer farm resources to the production of livestock and in some countries governments have deliberately fostered such a transfer, in view of unfavourable developments, in particular in the dairy sector and to a lesser extent in respect of cereals. It is difficult to foresee what the duration and amplitude of the present upward movement will be since this depends to some extent on how farmers and governments will react to the recent decline in

price levels. The nature of the reaction is obviously of great importance to the main exporting countries whose economies may be severely affected if production in some of their major markets continues to expand under the shelter of protective policies. Thus, taking the average of the years 1958-60, exports of chilled and frozen beef and veal represented respectively 14.0, 10.9, 8.4 and 5.3 per cent of the total value of exports of Argentina, Uruguay, New Zealand and Australia.

Due to the general rise in retail prices which occurred during the period of short supply, consumption declined correspondingly in importing as well as in exporting countries. In view of the price elasticity of demand for meat it would seem, therefore, that important increases in consumption would now occur in practically all countries if retail prices of beef and veal could be lowered and kept more in line with the prices of poultry and other competing kinds of meat. In some countries it would also seem that a reduction in the margins between producer, wholesale and retail prices would contribute to this end. As with production, the policies of governments may have a decisive influence on the trend of consumption and thus on the total level of world demand and world trade.

From this brief analysis it will be seen that attempts to make positive forecasts of future developments are handicapped by the existence of a number of very uncertain factors. The degree of uncertainty is, of course, heightened by the fact that the policies to be applied by the European Economic Community (and perhaps an enlarged Community) have still to be decided. Thus, neither the level of prices which will be aimed at in Europe nor the conditions of access which will be imposed at the frontiers are known. These factors, with others, will have an important bearing on future production, consumption and trade patterns.

Mutton and Lamb

The policies of the United Kingdom, by far the largest importer of mutton and lamb, are of paramount importance to exporting countries. The United Kingdom Government itself has drawn attention to the high support level in operation in that country and has taken steps to reduce it. In many other countries, the United States being a notable exception, imports of mutton and lamb are adversely affected by quantitative restrictions, import levies, or other policies designed to support domestic producers. The opening of a new market in Japan has been an event of considerable significance, but development of demand there may take time as a change of dietary habits is involved. Moreover, efforts to increase Japanese home production and the foreign exchange policy which may restrict the foreign currencies allocated for importing meat, may prevent a substantial further rise in Japan's imports of mutton above 1961 levels. In Europe, there is a widespread preference for beef, veal and pigmeats and demand for mutton and lamb is limited. It is possible that demand could be stimulated by trade promotion techniques, but because of the current, often severe restrictions on imports, there is no incentive to undertake trade promotion activities. Attempts are made to sell more mutton in the Mediterranean area and the Near East and these areas may well provide an expanding market in the future, although there are obvious limits.

Table 1

PRODUCTION, NET IMPORTS AND APPARENT CONSUMPTION OF BEEF AND VEAL IN THE UNITED KINGDOM, GERMANY AND ITALY
1954 to 1961
(thousand long tons)

	UNITED KINGDOM			GERMANY			ITALY		
	Production[a]	Net imports	Apparent consumption[b]	Production	Net imports[c]	Apparent consumption[b]	Production	Net imports	Apparent consumption[b]
1954 . . .	752	266	1018	(785)	(57)	(771)	403	26	429
1955 . . .	704	345	1048	802	(17)	810	411	(45)	456
1956 . . .	806	430	1236	808	93	883	428	68	495
1957 . . .	822	442	1264	884	54	903	435	95	527
1958 . . .	813	385	1197	934	23	934	456	120	573
1959 . . .	718	349	1067	937	53	944	514	100	620
1960 . . .	820	350	1170	981	65	1128	515	137	650
1961 . . .	091	288	1179	(1030)	84	(1100)	(620)	54	(675)

[a] Incl. production from imported fat cattle.

[b] Total supplies, excl. changes in stocks.

[c] Total imports.

Source: Commonwealth Economic Committee, Intelligence Bulletin and Meat for production and consumption; national statistics for net imports.

Table 2

PRODUCTION AND CONSUMPTION OF BEEF AND VEAL IN AUSTRALIA, NEW ZEALAND, ARGENTINA, URUGUAY AND FRANCE 1954-61
(thousand long tons, carcase weight)

	Production					Apparent Consumption				
	Australia[a]	N.Zealand[b]	Argentina	Uruguay	France	Australia[a]	N.Zealand[b]	Argentina	Uruguay	France
1954 . . .	720	200	1785	265	1320	470	100	1560	155	1270
1955 . . .	750	225	2115	255	1310	495	100	1705	230	1240
1956 . . .	815	260	2440	270	1280	550	110	1845	230	1270
1957 . . .	790	265	2420	275	1270	545	110	1845	230	1270
1958 . . .	905	270	2500	230	1220	520	115	1865	(200)	1220
1959 . . .	750	235	1915	255	1330	445	100	1405	(220)	1260
1960 . . .	640	235	1870	..	1460	400	105	1490	..	1360
1961 . . .	..	..	..	..	1600	..	..	..	..	1430

Source: Commonwealth Economic Committee, Meat and Intelligence Bulletin.

[a] Twelve months starting 1 July of the year stated.

[b] Twelve months ending 30 September of the year stated.

genre "capsicum" ou "pim

TROPICAL PRODUCTS

Table 3

EXPORTS OF BEEF AND VEAL FROM AUSTRALIA, NEW ZEALAND, ARGENTINA, URUGUAY AND FRANCE, 1954-1961

(thousand long tons, carcass weight)

	Australia	New Zealand	Argentina	Uruguay	France
1954	112	60	106	44	46
1955	147	94	192	4	52
1956	122	118	361	26	5
1957	159	116	360	32	11
1958	165	116	425	20	5
1959	225	89	366	24	30
1960	145	99	278	52	62
1961	164	(115)	(240)	(40)	103

Source: Commonwealth Economic Committee Meat and Intelligence Bulletin.

Table 4

IMPORTS OF BEEF AND VEAL (FRESH, CHILLED OR FROZEN) INTO THE UNITED KINGDOM AND THE UNITED STATES FROM SELECTED COUNTRIES 1956-61

(thousand metric tons, actual weight)

	Total		Australia		New Zealand		Argentina		Uruguay		Ireland		Other	
	UK	US	UK	US	UK	US	UK	US	UK	US	UK	US	UK	US
1956 . . .	446.1	14.0	101.7	1.3	80.2	1.2	252.3	-	2.7	-	7.6	1.9	1.6	8.9
1957 . . .	467.4	57.4	134.2	2.5	57.1	22.1	263.7	-	7.3	-	2.8	5.0	2.3	29.2
1958 . . .	408.9	162.6	127.2	7.6	14.1	82.1	259.9	-	1.5	-	3.0	16.8	3.2	61.6
1959 . . .	361.6	238.1	111.0	111.6	7.4	73.4	215.2	-	6.6	-	7.0	19.1	14.4	44.4
1960 . . .	358.4	187.9	65.7	65.4	26.9	59.9	266.7	-	33.1	-	15.0	19.8	17.7	43.4
1961 . . .	292.6	282	32.7	101	12.2	68	155.1	-	20.5	-	33.5	31	32.6	52

Sources: Trade returns of the United Kingdom and the United States.

TROPICAL PRODUCTS
genre "caoutchouc" ou "pr

Table 5

PRICES OF IMPORTED CHILLED AND FROZEN BEEF IN THE UNITED KINGDOM AND THE UNITED STATES 1956-1961

(indices 1956 = 100)

	1957	1958	1959	1960	1961
Frozen beef from Australia and New Zealand					
United Kingdom[1]	99	..	144	151	128
United States[2]	108	147	159	154	148
Chilled beef from Argentina					
United Kingdom[1]	104	120	127	131	120

[1] Quotations on the Smithfield market.

[2] Unit value index for boneless frozen beef imported from Australia and New Zealand.

Table 6

SUPPLIES OF SELECTED "NEW EXPORTERS" ON THE GERMAN, ITALIAN AND UNITED KINGDOM MARKETS, 1956-1961

(thousand metric tons)

	1956	1957	1958	1959	1960	1961
France to Germany	7.4	-	-	11.3	30.3	37.3
Italy	1.5	1.2	-	3.3	8.9	8.5
Netherlands to Germany	0.2	0.3	0.5	1.1	3.3	8.9
Italy	1.3	6.6	8.5	6.6	14.8	-
Yugoslavia to Italy	3.0	2.5	3.1	1.9	8.9	2.2
United Kingdom	-	-	-	1.3	2.1	19.4
South Africa and Rhodesia and Nyasaland to United Kingdom	-	-	0.6	9.7	12.3	15.6

Note: The data above are taken from national trade returns of the importing countries. The figures relating to Yugoslav supplies to the United Kingdom include small quantities imported by the United Kingdom from other origins as the United Kingdom monthly trade returns do not distinguish minor origins of imports.

Source: National trade returns.

Table 7

DEVELOPMENT OF PRODUCTION OF BEEF AND VEAL IN THREE AREAS, 1955-1961

(thousand long tons, carcass weight)

	1955	1956	1957	1958	1959	1960	1961
Argentina, Australia, New Zealand[a]	3090	3513	3480	3675	2900	2744	..
Western Europe (10 countries[b])	4050	4120	4250	4290	4340	4700	(5100)
United States	6760	7185	7020	6480	6510	7070	(7350)

[a] Data for Argentina relate to calendar years while those for Australia cover twelve months starting 1 July of the year stated and those for New Zealand twelve months ending 30 September of the year stated.

[b] Austria, Belgium, Denmark, France, Germany, F.R., Ireland, Italy, Netherlands, Sweden and United Kingdom.

Source: Commonwealth Economic Committee, Meat and Intelligence Bulletin; estimates for 1961 are based on national sources.

Table 8

PRODUCTION AND TRADE OF MUTTON AND LAMB IN SELECTED COUNTRIES 1954-61
(thousand long tons and indices)

	Production		Exports			Imports	Import prices
	New Zealand[1]	United Kingdom	New Zealand	Australia	Argentina	United Kingdom	United Kingdom
			(thousand long tons)				(Index 1954=100)
1954	328	205	277	59	57	324	100
1955	346	174	267	56	70	354	104
1956	352	194	272	34	55	344	101
1957	335	199	251	43	46	335	111
1958	353	190	270	64	39	340	104
1959	424	246	322	61	30	364	85
1960	441	224	345	66	37	375	102
1961	..	264	(330)	65	(35)	347	85

[1] Twelve months ending 30 September of the year stated.

Source: Commonwealth Economic Committee, Meat and Intelligence Bulletin.

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Table 9

IMPORTS OF BEEF AND VEAL (FRESH, CHILLED AND FROZEN) INTO FOUR MAIN IMPORTING COUNTRIES IN 1958-61
('000 metric tons)

Imports by / From	UNITED STATES				UNITED KINGDOM				GERMANY, F.R.				ITALY			
	1958	1959	1960	1961	1958	1959	1960	1961	1958	1959	1960	1961	1958	1959	1960	1961
Argentina	-	-	-	-	260	219	207	155	19	29	9	14	29	27	33	35
Uruguay	-	-	-	-	1	7	33	21	-	7	10	9	2	1	3	..
Brazil	35	22	18	24									17	13	2	..
Mexico	8	101	66	101	127	111	66	33								
Australia	83	73	49	68	14	7	21	12								
New Zealand																
Denmark									-	1	4	-	1	-	-	..
Netherlands									-	0.5	4	6	44	38	49	3
France					3	7	15	..	0.5	1	3	16	9	7	15	..
Ireland									-	11	33	41	-	3	9	8
									0.5	0.5	3	4	0.5	0.5	1	..
Total imports	163	238	188	252	409	362	360	293	23	53	65	84	117	100	137	54

Source: Intelligence Bulletin, Commonwealth Economic Committee and national trade returns.

Table 10

TRADE IN CARCASE BEEF AND VEAL IN THE EUROPEAN ECONOMIC COMMUNITY, 1954 to 1960
(thousand tons)

	1954-56	1957	1958	1959	1960
Trade among the Six	27	31	33	58	93
Imports from selected countries:					
Denmark	23	46	46	41	53
Ireland	2	6	1	1	3
Yugoslavia	1	3	3	2	9
Argentina	25	65	62	65	52
Brazil	1	9	20	16	4
Uruguay	5	16	4	9	14
Australia	2	2	1	-	1
New Zealand	13	13	4	1	4
Total	72	160	141	135	140
Imports from other countries	17	12	12	11	18
Total imports by EEC	116	203	186	204	251
Total exports	54	45	51	80	124
Net imports	62	158	135	124	127
EEC intra-trade as per cent of all imports	23	15	18	28	37

Source: Commonwealth Economic Committee, Meat 1961, and 1962.

Table 11 CUSTOMS DUTIES APPLIED IN CERTAIN COUNTRIES

1 January 1962

Canada		m.f.n.	British preferential
Cattle for slaughter	per lb.	1½ cts.*	Free
Sheep for slaughter	per head	$2.00	Free
Beef and veal	per lb.	3 cts.*	3 cts.
Mutton and lamb	per lb.	6 cts.	4 cts. Australia New Zealand ½ ct.
Canned beef	ad valorem	30%*	15% Australia, New Zealand Free

Federal Republic of Germany	m.f.n.	EEC Members
Cattle for slaughter:		
Calves	11.8%	7 %
Cows	16 %	10.5%
Sheep for slaughter	15 %	10.5%
Beef and veal:		
Fresh or chilled	20 %	14 %
Frozen	13 %	7 %
Mutton and lamb fresh chilled or frozen	20 %	14 %
Canned beef	19 %	11 %

France	m.f.n.	EEC Members
Cattle for slaughter		
Bulls	16 %	Free
Other	16 %	Free
Sheep for slaughter	22 %	17.5%
Beef and veal:		
fresh, chilled or frozen	20 %	Free
Mutton and lamb	23.5%	17.5%
Canned beef non-truffled	31.5%	24.5%

Italy	m.f.n.	EEC Members
Cattle for slaughter	16 %	11.2%
Sheep for slaughter:		
of domestic type	16 %	11.2%
Beef and veal:		
Fresh, chilled	20 %	12.5%
Frozen	20 %	12.5%
Mutton and lamb:		
of domestic type animals	20 %	12.6%

Benelux	m.f.n.	EEC Members
Cattle for slaughter:	11.1%	6.3%
Sheep for slaughter:		
of domestic type	8.7%	4.2%

*Tariff bound in GATT.

Benelux continued	m.f.n.	EEC Members
Beef and veal:		
Fresh, chilled or frozen	14.4%	8.4%
Mutton and lamb	14.4%	8.4%
Canned beef	28.8%	21 %

Switzerland	m.f.n.	
Cattle for slaughter	Sw.Fr.10.- per head	
Sheep for slaughter	5.- per head	
Beef and veal:		
Fresh, chilled or frozen	10.- per 100 kgs.	Binding at 35.-
Mutton and lamb	10.- - " -	
Canned beef	50.- - " -	

United Kingdom	m.f.n.	British preferential
Cattle and calves	Free	Free
Sheep and lambs	Free	Free
Beef and veal:		
Boned or boneless	20 %	Free
Other:		
Chilled	3/4d per lb.	Free
Fresh or frozen	2/3d per lb.	Free
Mutton and lamb	Free	Free
Canned beef (excluding tongues and jellied veal)	20 %	Free

United States	m.f.n.
Cattle for slaughter:	
(1) Weighing under 200 pounds each	
(a) within a quota of 200,000 head a year	1½ cents per lb.*
(b) above quota of 200,000 head a year	2½ cents per lb.*
(2) Weighing over 700 pounds each	
(a) within a quota of 400,000 head a year	1½ cents per lb.*
(b) above quota of 400,000 head a year	2½ cents per lb.*
(3) Weighing 200-700 lbs. each	2½ cents per lb.
Sheep and lambs	75 cents per head*
Beef and veal:	
Fresh, chilled, frozen	3 cents per lb.*
Mutton	2½ cents per lb.
Lamb	3½ cents per lb.
Canned beef valued per pound:	
Not over 20 cents	3 cents per lb.*
Over 20 cents	15% ad valorem *

*Tariff bound in GATT

AGRICULTURAL PRODUCTS
Tariff and trade barriers

	Import levy Sw.Cr./100 kgs.
Sweden	
Cattle, with an age of not more than one year	50.-
Other	50.-
Sheep	70.-
Beef, fresh, chilled and frozen	95.-
Veal, fresh, chilled and frozen	89.-
Mutton and lamb	140.-
Canned beef	124.-

GENERAL AGREEMENT ON TARIFFS AND TRADE

RESTRICTED

23 May 1962

GROUP ON MEAT

Redraft of Concluding Section

VII. Developments in Production and Consumption

In reviewing development of world beef and veal production since the early 1950's, it is necessary to consider particularly developments in Western Europe, the United States and in the main overseas exporting countries (see Table 7). In Western Europe, in the period 1954/55 to 1959/60, national movements in production were out of phase with one another. Production in France, for example, decreased from 1955/58 and increased again notably since 1959; production in Germany shows a continuously increasing trend with only a small decrease in 1958; production in the United Kingdom shows no substantial variation except for a fall in 1959, and Italian production continuously increased over this period. While it is difficult to discern a definite trend on a country-by-country basis, it can be seen that total production in Western Europe, during the period 1954/55 to 1959/60, had only a slightly increasing tendency, but started to increase rapidly in 1960 and 1961. In the United States, which is the largest producer of beef, a peak in production was reached in 1956 and, after a trough in 1958 and 1959, production increased in 1960 and exceeded in 1961 the preceding peak.

In the main overseas exporting countries Argentinian production increased from 1954 to 1958, but then declined considerably until the recovery in 1961. The trend in production in New Zealand and Uruguay over the period 1954 to 1960 was comparatively stable. Australia on the other hand had a peak production in 1958/59, but because of drought conditions in the beef export producing areas in 1959/60 1960/61, production declined considerably. An appreciable recovery is noted in Australian production for the current year 1961/62.

TROPICAL PRODUCTS

As a result of these divergent movements in importing and exporting areas, some imbalance in the world meat situation appeared in 1957 with the reduction of domestic production in the United States, and became more serious in 1958 when production of overseas exporters started to decline. In 1961, however, the balance began to swing in the opposite direction, with the simultaneous trend towards increased production in the United States, Western Europe and the major exporting countries in the Southern hemisphere. According to information given to the Group this trend continued in 1962.

The general trend of increasing production, while due in part to technical improvements in cattle breeding, is in some instances the result of deliberate government action to expand beef production as part of their agricultural policies. Production has also been affected by climatic factors, for example in the United Kingdom where conditions were particularly favourable in 1961. On the other hand the decreases in production referred to, notably in Australia and the Argentine, were to a large extent the result of serious drought conditions.

In respect of beef consumption it was noted that over the period 1954/61 total consumption in Western Europe increased, particularly in Italy, Germany and France. While part of this rise in consumption is in line with the increase of population, it seems largely due to a rise in income levels and relatively high income elasticity for meat. Per capita consumption in the United States fell from 43 kilos in 1956 to 39 kgs. in 1958 and 1959, but increased again in 1960. In the overseas exporting countries total beef consumption in Argentina and Australia dropped appreciably in 1959 and 1960. In New Zealand per capita consumption of beef also showed a decrease in those years.

Prices

It was noted that prices received by exporters of beef, and particularly such prices for frozen beef, had increased considerably between 1957 and 1960. Since that time these prices have tended to fall in the major import markets. This tendency has great importance for exporters, for although the proportion of total meat production entering world trade is relatively small, that proportion is concentrated in a few countries and contributes a significant proportion to their export incomes. Thus, taking the average of the years 1958/60, exports of chilled and frozen beef and veal represented respectively 14.0, 10.9, 8.4 and 5.8 per cent of the total value of exports of Argentina, Uruguay, New Zealand and Australia.

The effects on production of changes in prices to producers raises fundamental issues. In many importing countries farm resources have been transferred to the production of livestock and in some countries governments have deliberately fostered such a transfer by measures aiming at increasing the level of prices paid to producers or at maintaining prices at a level considered sufficiently remunerative. The extent to which these measures have been instrumental in bringing about increased production is a difficult question to answer with complete accuracy as the effect of price changes in other sectors of farm production and the effects of technological progress would also have to be taken into account.

So far as exporting countries are concerned, price policies which have led to increased production in importing countries have had a prejudicial effect on the degree of access to such of those countries as have regulated imports in accordance either with domestic production or internal producer prices. Furthermore, in so far as these changes in production patterns in importing countries have contributed to instability in export prices, exporters have had difficulty in planning future production which in the nature of the industry requires a long-term basis. For similar reasons, when prices fall, producers must accept the market price even if losses are involved as production trends cannot be reversed in the short-term.

Similarly, the relationship between the level of retail prices and the level of consumption at a given income level is a matter of considerable importance for the future of trade in meat and warrants careful consideration. This relationship is a complex one as adjustment of demand to any given change in retail prices may be affected by the existence of substitutes or by other factors, such as consumer preferences of one kind or another. Nevertheless, the link is important and needs further study in its application to internal and external markets for meat. It was noted, for example, that when prices have fallen such falls do not appear always to have been reflected in consumer prices.

In the view of exporting members of the Group the demand for beef shows a positive response to significant price decreases and consequently government price support policies as they affect prices at the retail level can have an important bearing on demand and hence trade. The predominant factor in many countries has been the disparity between internal and external prices.

The Group expressed a desire to pursue at a later stage a closer examination of the relationship between wholesale and retail prices. It is hoped that additional information, on which to base such an examination, will become available.

Access to Markets

The Group noted that trade was affected not only by tariffs, which were not regarded by exporters as the primary obstacle to their trade, but also by the existence of non-tariff measures such as deficiency payments, variable import levies, quantitative restrictions and certain other measures. Although it was recognized that such non-tariff measures were employed for a number of reasons, it was noted that their employment affected access to markets, in many cases seriously. For example, the representatives of Argentina and Uruguay stated that the lack of outlets for chilled and frozen beef had forced their exporters to export their cattle on the hoof at a real economic loss. Furthermore, denial of access affected not only the quantities of meat that could be exported, but such denial had a serious effect on price levels.

It was agreed by the Group that, in meat consuming countries, an increase in income levels tends to lead to an expansion of meat consumption. It was the strong desire of exporting countries that, in conducting their policies importing countries should ensure that exporters should be assured of the opportunity to compete for a share of any significant expansion of consumption which may take place as income levels rise.

MULTILATERAL TRADE NEGOTIATIONS
Group "Meat"

ACCORD GENERAL SUR LES TARIFS DOUANIERS
ET LE COMMERCE

RESTRICTED

23 mai 1962

GROUPE DE LA VIANDE

VII.

L'évolution de la production et de la consommation

En examinant l'évolution de la production mondiale de viande de boeuf et de veau depuis les premières années 50, il importe de prendre en considération l'évolution qui s'est produite en particulier en Europe occidentale, aux Etats-Unis et dans les principaux pays exportateurs d'outre-mer (voir tableau 7). En Europe occidentale, durant la période 1954/55 - 1960/61, les mouvements de la production dans les différents pays étaient déphasés entre eux. En France, par exemple, la production a fléchi de 1955 à 1958 et a connu un redressement marqué à partir de 1959. En Allemagne, elle a suivi une courbe ascendante régulière qui n'a marqué qu'un léger fléchissement en 1958. Au Royaume-Uni elle n'a pratiquement enregistré aucune variation, si ce n'est un recul qui s'est produit en 1959. En 1961, toutefois, la production du Royaume-Uni a augmenté considérablement. En Italie, elle n'a cessé d'augmenter sur tout l'ensemble de la période. S'il est malaisé de discerner une tendance nette pour chacun des pays considérés, ainsi qu'il ressort du tableau 7 pour les pays auxquels il se rapporte, la production totale de l'Europe occidentale dans la période 1954/55 - 1959/60 n'a augmenté que modérément puis s'est mise à progresser rapidement en 1960 et en 1961 au point de satisfaire une part substantielle de l'accroissement de la consommation apparente de la région et, dans certains cas, de dépasser cet accroissement. Aux Etats-Unis, pays qui est le plus gros producteur de viande de boeuf, la courbe a marqué une pointe en 1956 puis un mouvement de repli en 1958 et en 1959, pour atteindre de nouveaux sommets en 1960 et en 1961.

Si l'on considère les principaux pays exportateurs d'outre-mer, on constate qu'en Argentine la production a augmenté de 1954 à 1958, puis a fléchi considérablement pour se redresser en 1961 sans toutefois retrouver le niveau atteint antérieurement. En Nouvelle-Zélande et en Uruguay, la tendance de la production s'est caractérisée par une stabilité relative de 1954 à 1960. En revanche, une production record a été enregistrée en Australie en 1958/59, mais du fait de la sécheresse dont ont souffert les régions productrices de viande de boeuf pour l'exportation en 1959/60 et en 1960/61, la production a fortement fléchi. L'année 1961/62 se distingue par un redressement notable de la production australienne. Durant cette même période, l'élevage uruguayen a produit un nombre exceptionnellement élevé de bovins pour l'exportation.

TROPICAL PRODUCTS
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Ces mouvements divergents de la production constatés dans les régions importatrices et dans les régions exportatrices, se sont accompagnés d'une poussée de la demande alors même que la production fléchissait aux Etats-Unis. La situation de l'offre s'est aggravée en 1959 lorsque la production a commencé de fléchir dans les pays exportateurs d'outre-mer. En 1961, cependant, la production s'est orientée à la hausse à la fois aux Etats-Unis, en Europe occidentale et dans les grands pays exportateurs de l'hémisphère austral. Les renseignements dont le groupe dispose à l'heure actuelle indiquent que cette tendance se maintient en 1962.

L'orientation générale de la production dans le sens de la hausse qui est due en partie à l'amélioration des techniques d'élevage est parfois imputable à l'action délibérée des gouvernements qui visent, dans le cadre des politiques agricoles nationales, à développer la production de viande de boeuf. La production a subi également le contrecoup des conditions climatiques, au Royaume-Uni par exemple où le printemps très propice de 1961 a causé la mise sur le marché de bétail gros en quantités anormales. En revanche, les fléchissements de production susmentionnés, en Australie et en Argentine notamment, sont imputables dans une large mesure à une grave sécheresse.

Les effets sur la production des variations du prix payé aux producteurs posent des problèmes fondamentaux. Dans de nombreux pays importateurs, les ressources des exploitations agricoles ont été affectées à la production de viande, souvent par suite de difficultés de la commercialisation d'autres produits agricoles, et, dans certains pays, les gouvernements ont délibérément favorisé cette réorientation de l'activité agricole par des mesures visant à accroître les prix payés aux producteurs ou en maintenant ces prix à un niveau considéré comme suffisamment rémunérateur. Ces mesures ont contribué à causer un accroissement de la production. Il est difficile de répondre avec une absolue précision à la question de savoir dans quelle mesure elles y ont contribué, car il convient également de tenir compte des conséquences des variations de prix dans les autres secteurs de l'agriculture ainsi que des effets du progrès technique. Le groupe a considéré que l'étude de ce problème devrait être poursuivie.

GENERAL AGREEMENT ON TARIFFS AND TRADE
ACCORD GENERAL SUR LES TARIFS DOUANIERS ET LE COMMERCE

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Spec(63)193
27 June 1963

GROUP ON MEAT - GROUPE DE LA VIANDE

Statistics on Meat
Statistiques concernant la viande

Page

(1) Production, net imports and apparent consumption of beef and veal in the United Kingdom, Germany, Italy and United States, 1954-1962 2
Production, importations nettes et consommation apparente de viande de boeuf et de veau au Royaume-Uni, en Allemagne, en Italie et aux Etats-Unis, 1954-1962

(2) Production and apparent consumption of beef and veal in Australia, New Zealand, Argentina, Uruguay, France and Denmark, 1954-1962 3
Production et consommation apparente de viande de boeuf et de veau en Australie, Nouvelle-Zélande, Argentine, Uruguay, France et Danemark, 1954-1962

(3) Exports of beef and veal from Australia, New Zealand, Argentina, Uruguay, France and Denmark, 1954-1962 4
Exportations de viande de boeuf et de veau en provenance de l'Australie, de la Nouvelle-Zélande, de l'Argentine, de l'Uruguay, de la France et du Danemark, 1954-1962

(4) Imports of beef and veal into four main importing countries by origin, 1956-1962 5
Importations de viande de boeuf et de veau dans quatre des principaux pays importateurs par origine, 1956-1962

(5) Development of prices of imported chilled and frozen beef in the United Kingdom and the United States, 1956-1962 6
Evolution du prix de la viande de boeuf réfrigérée et congelée importée au Royaume-Uni et aux Etats-Unis entre 1956 et 1962

(6) Production and trade of mutton and lamb in New Zealand, Australia, Argentina and the United Kingdom, and prices of imported lamb in the United Kingdom, 1954-1962 7
Production et commerce de viande de mouton et d'agneau en Nouvelle-Zélande, Australie, Argentine et au Royaume-Uni, et prix de la viande d'agneau importée au Royaume-Uni, 1954-1962

TROPICAL PRODUCTS
genre "capsicum" ou "pim

Table 1 - Tableau 1

Production, Net imports and Apparent Consumption of Beef and Veal in the United Kingdom, Germany, Italy and United States, 1954 - 1962

Production, importations nettes et consommation apparente de viande de boeuf et de veau au Royaume-Uni, en Allemagne, en Italie et aux Etats-Unis, 1954 - 1962

(thousand tons - milliers de tonnes)

	1954	1955	1956	1957	1958	1959	1960	1961	1962
United Kingdom - Royaume-Uni									
Production	764	715	819	835	826	729	833	905	919
Net imports - Importations nettes	270	351	437	449	391	355	356	292	333
Apparent consumption - Consommation apparente	1034	1066	1256	1284	1217	1084	1189	1198	1252
Germany, F.R. - Allemagne, R.F.									
Production	(782)	815	837	913	955	973	1019	1065	(1140)
Net imports - Importations nettes	1	12	89	47	7	38	45	73	93
Apparent consumption - Consommation apparente	(783)	827	926	960	962	1011	1064	1138	(1233)
Italy - Italie									
Production	409	418	431	439	461	518	521	627	..
Net imports - Importations nettes	26	46	68	93	117	100	137	54	95
Apparent consumption - Consommation apparente	435	464	499	532	578	618	658	681	..
United States - Etats-Unis									
Production	6627	6870	7299	7134	6584	6617	7182	7412	(7398)
Net imports - Importations nettes	2	10	- 14	25	159	234	182	253	387
Apparent consumption - Consommation apparente	6629	6880	7285	7159	6743	6851	7364	7665	(7785)

Note: The production data relate to meat from slaughtered animals including imported cattle and calves. In 1960, imported live animals accounted for about 1 % of the United States beef and veal output and for about 10-11% of that in the United Kingdom, Germany and Italy.

Les chiffres de production se réfèrent à la viande provenant d'animaux abattus y compris les animaux importés. En 1960, les animaux importés représentaient environ 1 % de la production totale de viande de boeuf et de veau aux Etats-Unis et entre 10 et 11 % au Royaume-Uni, en Allemagne et en Italie.

Sources: Commonwealth Economic Committee, Intelligence Bulletin and Meat for production and consumption; national statistics for net imports - Statistiques nationales pour les importations nettes.

Table 2 - Tableau 2

Production and Apparent Consumption of Beef and Veal in Australia, New Zealand, Argentina, Uruguay, France and Denmark, 1954-1962

Production et consommation apparente de viande de boeuf et de veau en Australie, Nouvelle-Zélande, Argentine, Uruguay, France et Danemark, 1954-1962

(thousand tons - milliers de tonnes)

	1954	1955	1956	1957	1958	1959	1960	1961	1962
Australia[a] - Australie[a]									
Production	732	763	828	805	920	764	643	800	..
Apparent consumption - Consommation apparente	480	503	558	553	531	450	402	443	..
New Zealand[b] - Nouvelle-Zélande[b]									
Production	202	230	265	271	272	238	240	241	285
Apparent consumption - Consommation apparente	103	103	109	114	117	104	105	106	..
Argentina - Argentine									
Production	1815	2147	2475	2460	2541	1945	1913	2112	..
Apparent consumption - Consommation apparente	1583	1732	1873	1873	1894	1427	1522	1712	..
Uruguay									
Production	271	259	272	278	215	218	263	..	..
Apparent consumption - Consommation apparente	158	235	237	233	..	..	..	..	..
France									
Production	1360	1390	1301	1288	1239	1305	1426	1573	1695
Apparent consumption - Consommation apparente	1310	1345	1292	1292	1237	1280	1377	1456	1542
Denmark - Danemark									
Production	(134)	124	134	161	152	147	153	143	(185)
Apparent consumption - Consommation apparente	68	76	78	73	74	81	79	83	102

[a] Twelve months starting 1st July of the year stated - Période de 12 mois commençant le 1er juillet de l'année indiquée.
[b] Twelve months ending 30th September of the year stated - Période de 12 mois finissant le 30 septembre de l'année indiquée.

Note: The production data relate to output from slaughtered animals i.e. excluding exported live cattle and calves; those for apparent consumption are based on the production data already described and net exports of both fresh chilled and frozen meat and canned meat.

Les chiffres de production représentent la production de viande provenant d'animaux abattus à l'exclusion des boeufs et des veaux exportés sur pied; les chiffres de consommation apparente ont été obtenus à partir de la production comme elle est définie ci-dessus, et des exportations nettes de viande fraîche, congelée, réfrigérée, et de viande en conserve.

Source: Commonwealth Economic Committee, Meat and Intelligence Bulletin.

MEAT AND MEAT PRODUCTS
genre de viande et produits à base de viande

Table 3 - Tableau 3

Exports of Beef and Veal from Australia, New Zealand, Argentina, Uruguay, France and Denmark, 1954-1962

Exportations de viande de boeuf et de veau en provenance de l'Australie, de la Nouvelle-Zélande, de l'Argentine, de l'Uruguay, de la France et du Danemark, 1954-1962

(thousand tons - milliers de tonnes)

	1954	1955	1956	1957	1958	1959	1960	1961	1962
Australia - Australie	114	149	124	162	168	229	146	164	250
New Zealand - Nouvelle-Zélande	61	96	120	118	118	90	101	97	118
Argentina - Argentine	108	195	367	366	432	372	282	275	(350)
Uruguay	45	4	26	33	20	24	55	40	57
France	47	53	15	11	5	30	63	104	154
Denmark - Danemark	56	42	47	83	72	60	71	50	73

Source: Commonwealth Economic Committee, Meat and Intelligence Bulletin.

Note: Exports of live animals from Argentina, Australia, New Zealand and Uruguay are very small; from France and Denmark they may be roughly estimated at:
Les exportations d'animaux sur pieds d'Argentine, d'Australie, de Nouvelle-Zélande et d'Uruguay sont très faibles; pour la France et le Danemark, on peut les estimer approximativement à:

	1954	1955	1956	1957	1958	1959	1960	1961	1962
(in thousand tons, carcass weight - en milliers de tonnes, poids carcasse)									
France	14	33	6	5	4	24	45	34	25
Denmark - Danemark	46	70	66	55	78	84	85	90	71

Table 4 - Tableau 4

Imports of Beef and Veal (fresh, chilled and frozen) into Four Main Importing Countries, 1956-1962

Importations de viande de boeuf et de veau (fraîche, réfrigérée et congelée) dans quatre des principaux pays importateurs, 1956-1962

(thousand tons - milliers de tonnes)

Importing countries / Pays importateurs	Year / Année	Exporting countries / Pays exportateurs: Argentina / Argentine	Uruguay	Mexico / Mexique	Australia / Australie	New Zealand / Nouvelle-Zélande	Denmark / Danemark	Netherlands / Pays-Bas	France	Ireland / Irlande	Yugoslavia / Yougoslavie	Other exporting countries / Autres pays exportateurs	Total Imports / Importations totales
United States - Etats-Unis	1956	-	-	3	.1	2	-	-	-	2	-	6	14
	1957	0.5	-	6	2	23	-	-	-	3	-	22	57
	1958	0.5	-	28	8	83	-	-	-	13	-	30	163
	1959	-	-	22	101	73	-	-	-	19	-	23	238
	1960	-	-	18	65	60	-	-	-	24	-	23	190
	1961	-	-	24	101	66	-	-	-	31	-	31	255
	1962	-	-	27	204	96	-	-	-	31	-	32	390
United Kingdom - Royaume-Uni	1956	252	3	-	102	80	-	1	-	8	-	-	446
	1957	263	7	-	134	57	..	1	-	3	-	2	467
	1958	260	2	-	127	14	..	2	-	3	-	1	409
	1959	215	7	-	111	7	..	3	-	7	-	12[a]	362
	1960	207	33	-	66	20	..	3	-	15	1	13[a]	358
	1961	155	21	-	33	12	0.5	3	-	34	19	19[a]	293
	1962	184	17	-	36	8	..	3	..	22	35	28[a]	333
Germany, F.R. - Allemagne, R.F.	1956	52	10	-	-	15	1	-	7	1	-	7	93
	1957	33	9	-	-	4	3	0.5	-	4	-	-	54
	1958	20	-	-	-	1	1	0.5	-	0.5	..	1	23
	1959	29	7	-	..	1	0.5	1	11	0.5	..	3	53
	1960	9	9	-	..	4	4	3	30	3	-	2	65
	1961	14	9	-	..	-	6	10	41	4	-	-	84
	1962	21	7	-	..	0.5	12	10	50	2	..	2	105
Italy - Italie	1956	17	2	-	1	9	27	1	2	..	..	9[b]	68
	1957	21	..	-	..	6	38	7	..	..	..	21[b]	93
	1958	27	2	-	4	4	44	9	-	0.5	..	30[b]	117
	1959	27	1	-	..	-	38	7	3	0.5	..	23[b]	100
	1960	33	3	-	..	-	49	15	9	-	9	19[b]	137
	1961	35	1	-	..	-	3	-	8	-	2	5[b]	54
	1962	45	..	-	..	..	17	10	3	..	6	14[b]	95

[a] Of which - dont: Rhodesia, Fed. - Rhodésie, féd. 1957: - 1; 1958: 6; 1959: 6; 1960: 5
South Africa - Afrique du Sud 1957: -; 1958: -; 1959: 3; 1960: 7
[b] Of which - dont: Brazil - Brésil 1957: 6; 1958: 16; 1959: 13; 1960: 2

Source: Commonwealth Economic Committee, Intelligence Bulletin and Meat.

Cette page ne peut être reproduite sans la mention "Conseil international des céréales" ou "IGC"

Table 5 - Tableau 5

Development of Prices of Imported Chilled and Frozen Beef in the United Kingdom and the United States 1956-1962

Evolution du prix de la viande de boeuf réfrigérée et congelée importée au Royaume-Uni et aux Etats-Unis entre 1956 et 1962

(indices 1956 = 100)

	1957	1958	1959	1960	1961	1962
Frozen beef from Australia and New Zealand Viande de boeuf congelée en provenance d'Australie et de Nouvelle-Zélande						
United Kingdom[a] - Royaume-Uni[a]	99	..	144	151	133	140
United States[b] - Etats-Unis[b]	110	146	159	153	146	133
Chilled beef from Argentina Viande de boeuf réfrigérée en provenance d'Argentine						
United Kingdom[c] - Royaume-Uni[c]	104	120	127	131	120	126

[a] Quotations on the Smithfield market for frozen beef imported from Australia.
Prix de gros de la viande de boeuf congelée d'origine australienne au marché de Smithfield.

[b] Unit value for boneless frozen beef imported from Australia and New Zealand.
Valeur unitaire de la viande de boeuf désossée et congelée importée d'Australie et de Nouvelle-Zélande.

[c] Quotations on the Smithfield market for chilled beef imported from Argentina.
Prix de gros de la viande de boeuf réfrigérée d'origine argentine au marché de Smithfield.

Source: Commonwealth Economic Committee, Meat.
National trade returns - Statistiques nationales du commerce extérieur.

Table 6 - Tableau 6

Production and Trade of Mutton and Lamb in New Zealand, Australia, Argentina and the United Kingdom, and Prices of Imported Lamb in the United Kingdom, 1954-1962

Production et commerce de viande de mouton et d'agneau en Nouvelle-Zélande, Australie, Argentine, et au Royaume-Uni, et prix de la viande d'agneau importée au Royaume-Uni, 1954-1962

(thousand tons - milliers de tonnes)

Production and Trade - Production et commerce	1954	1955	1956	1957	1958	1959	1960	1961	1962
New Zealand - Nouvelle-Zélande									
Production[a]	333	351	358	340	359	431	449	457	472
Exports - Exportations	281	271	276	255	274	327	351	347	334
Australia - Australie									
Production[b]	394	386	373	428	500	582	583	596	..
Exports - Exportations	60	57	35	44	65	62	66	67	80
Argentina - Argentine									
Production	205	198	185	163	172	165	178	175	..
Exports - Exportations	58	71	56	47	40	30	38	31	(42)
United Kingdom - Royaume-Uni									
Production	208	177	197	202	193	250	228	267	(254)
Imports - Importations	329	360	350	340	345	370	381	353	358
Prices of imported lamb in the United Kingdom[c] Prix de la viande d'agneau importée au Royaume-Uni[c] (index 1954 = 100)	100	104	101	111	104	85	102	85	94

[a] Twelve months ending 30th September of the year stated - Période de douze mois finissant le 30 septembre de l'année indiquée.

[b] Twelve months starting 1st July of the year stated - Période de 12 mois commençant le 1er juillet de l'année indiquée.

[c] Wholesale price of New Zealand lamb in the United Kingdom (Smithfield market) - Prix de gros de la viande d'agneau d'origine néo-zélandaise au Royaume-Uni (marché de Smithfield).

Source: Commonwealth Economic Committee, Meat and Intelligence Bulletin and ational trade returns for 1962 - et statistiques nationales du commerce extérieur pour 1962.

AGRICULTURAL PRODUCTS
Limited circulation
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GENERAL AGREEMENT ON
TARIFFS AND TRADE

RESTRICTED

Spec(63)200
1 July 1963

BRIEF NOTE ON RECENT DEVELOPMENTS IN TRADE IN BEEF AND VEAL AND IN MUTTON AND LAMB

I. Trade in beef and veal

World trade in carcass beef and veal expanded during 1962 for the second consecutive year. Whereas in 1961 the expansion was almost exclusively accounted for by the strong rise in exports from European countries, in 1962 larger quantities were exported both by the European and the overseas exporting countries. In particular, exports from the latter group of countries, which declined continuously, by about one fifth, between 1958 and 1961, recovered in 1962 from their low level of the previous year, reflecting inter alia the higher levels of production, stagnant domestic supplies in the United States and a slowing down in the rate of growth of production in Western Europe.

A main feature of the world market in 1962 was the continued strong expansion of imports, consisting mainly of frozen boneless beef, into the United States, which became the most important market for carcass beef and veal. As domestic production remained at about the previous year's level while demand, especially for manufacturing beef, continued to expand greatly, imports of beef and veal rose by about 50 per cent above their previous peak of 1961[1] to a level only slightly below the 400,000 tons mark, absorbing more than half of world exports from non-European countries. The great bulk of the United States increased beef requirements were supplied by Australia, imports from that country being about twice as great as in 1961 and accounting for more than half of the total. Imports from New Zealand also expanded substantially, by about 40 per cent, and their share in total imports rose to nearly one quarter. Among the smaller suppliers, imports from Mexico were also heavier than in 1961, while those from Ireland did not show any increase and those from Canada declined.

During the first three months of 1963 imports of beef and veal into the United States continued to rise and, largely due to heavy shipments from Australia, were by 18 per cent above the corresponding period of 1962.

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[1] At the same time imports of live cattle also reached a record level of nearly 1,300,000 head, an increase of more than one fifth over 1961. The increase was entirely accounted for by larger imports from Mexico, which accounted for about 60 per cent of the total, while those from Canada remained at about their 1961 level.

TROPICAL PRODUCTS
Mfn: no summary cables

In the United Kingdom domestic production, which had increased by as much as 10 per cent in each of the two preceding years, showed only a slight further expansion, of about 2 per cent, in 1962, when imports of carcass beef and veal, which were continuously declining between 1957 and 1961, recovered to a level of about 330,000 tons, an increase of 14 per cent over 1961[1], but still well below the average of earlier years. The increase in imports was essentially due to larger supplies - especially of chilled beef - from Argentina which recovered from their very low level of 1961, their share of total imports rising to about 54 per cent, and from Yugoslavia which in 1962 increased its share in this market to 11 per cent, about the same as that of shipments from Australia. Among suppliers of minor importance, imports from Ireland, Uruguay and New Zealand declined in 1962.

In January-April of this year imports of beef and veal were considerably, by about 35 per cent, above the corresponding 1962 figure, due especially to a large increase in supplies - mainly chilled beef - from Argentina which amounted to nearly 100,000 tons, about two thirds of the total, while imports from Yugoslavia were only slightly, and those from Australia substantially, below the corresponding period of 1962.

In Western Germany demand for beef continued to rise substantially in 1962 and although domestic supplies were by some 8 per cent larger than in 1961, imports of carcass beef and veal continued their upward movement and exceeded 100,000 tons, an increase of nearly one quarter as compared with 1961.[2] The most pronounced increases were in receipts from France and Argentina, the two main suppliers, which in 1962 accounted for 47 and 20 per cent, respectively, of total imports. Another 20 per cent were accounted for by the combined imports from Denmark, which rose sharply, and those of Netherlands, which showed only a slight increase, while shipments from Uruguay and Ireland were below their 1961 level.

In Italy, where in 1961 domestic production had increased by as much as 20 per cent and imports of beef and veal fallen by 60 per cent as compared with the previous year, the rise in demand in 1962 exceeded that of domestic supplies and imports of beef rose substantially[3] above their exceptionally low level of the previous year, but were still below the average of 1958-1960. The most pronounced increases were in receipts from Argentina, the chief source, which accounted for 47 per cent, and from Denmark, which accounted for nearly one fifth, of the total.

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[1] By contrast, live cattle imports, mostly from Ireland, declined by some 18 per cent to about 570,000 head. The whole decline was accounted for by smaller entries of fat cattle, while imports of store cattle were maintained at about their 1961 level.

[2] Imports of cattle and calves, however, declined, for the second consecutive year, to 375,000 head, their lowest level since 1957.

[3] Imports of live cattle, which were constantly increasing in recent years, declined in 1962 to a level slightly below 295,000 head.

Imports of beef of Eastern European countries, which in the preceding years did not exceed 20,000 tons per year, showed a sudden sharp rise in 1962, when they amounted to about 100,000 tons, of which nearly three quarters were imported by the Soviet Union.

In Australia, where production increased by about one quarter in 1961/62 as compared with the previous season, exports of carcass beef and veal increased substantially during 1962 when they were more than 50 per cent higher than in the preceding year. This increase was exclusively due to the rapid rise in shipments to the United States, which were twice as high as in 1961, while those to most other markets declined. During July-March of the current season 80 per cent of exports from Australia went to the United States, as against 50 per cent in the corresponding period of 1960/61.

The increase of about one fifth in New Zealand's exports of carcass beef and veal was also exclusively due to the strong expansion of supplies to the United States, which absorbed in 1962 more than three quarters of the total, while exports to the smaller markets, including the United Kingdom, were below their 1961 level.

In Argentina, where production had declined sharply, by about one quarter, between 1958 and 1960, for the second consecutive year slaughterings increased in 1962, partly as a result of a severe drought during the second half of the year. After a continuous decline between 1958 and 1961, exports of beef and veal were in 1962 substantially above their low level of the previous year. The increase was due to heavier shipments both to the main market, the United Kingdom, which took about 60 per cent of the total, and to Italy, Western Germany and other Western European countries.

Exports of beef and veal from Uruguay increased by more than 40 per cent over 1961, but were only slightly above the level of 1960. This increase was mainly due to the development of exports to the Soviet Union which accounted for nearly 30 per cent of the total export. By contrast, exports to the main two markets of the previous years, the United Kingdom and Western Germany, were smaller than in 1961.

A salient feature of developments in the main net exporting countries of Western Europe during 1962 was the large increase of about 50 per cent in exports of carcass beef from France[1], which became for the first time the most important exporter of beef (including live cattle) in Europe. The bulk of the increase was accounted for by exports to the Soviet Union, which exceeded 40,000 tons (only slightly less than exports to the main market, Western Germany), to other Eastern European countries and to Spain. In Denmark the increase in exports of carcass beef and veal during 1962 was to a large extent offset by smaller deliveries of live cattle, while in Ireland exports of both carcass beef and live cattle declined.

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[1] Exports of live cattle, however, declined from 122,000 to 90,000 head between 1961 and 1962.

TROPICAL PRODUCTS
genre "capsicum" ou "pim

From the fragmentary information available on price movements it appears that prices of chilled and frozen beef for the second consecutive year declined in 1962 in the main importing countries, with the exception of the United Kingdom, where there was a slight recovery from the depressed level of the previous year.

In the United States average unit values of frozen boneless beef from Australia and New Zealand, which had increased by about 50 per cent between 1956-57 and 1959-60, and were declining since then, were in 1962 nearly 10 per cent below their 1961 level, but still about 30 per cent higher than in 1956-57.

Price quotations for chilled beef from Argentina, in the United Kingdom which in 1961 declined by nearly 10 per cent as compared with the previous year, recovered during 1962 when they were, on average, about one fifth higher than in 1956-57. By contrast, average unit values of beef imported from Argentina into Germany and Italy declined for the second consecutive year and were in 1962 not only about 15-20 per cent lower than in 1960, but also below their level of 1956-57.

II. Trade in mutton and lamb

In the United Kingdom, output of mutton and lamb, following a sharp rise in 1961, declined by 5 per cent in 1962. Imports into this country, which represent about 80 per cent of the world total, were some 2 per cent heavier than in the previous year, but remained considerably lower than their high 1960 level. Exports from New Zealand, for the second consecutive year, were slightly smaller due mainly to reduced exports to the United Kingdom, which takes more than 80 per cent of the total. Average prices of lamb on the Smithfield market recovered in 1962 from their low level of the previous year but were still below the average of 1960.

During the first four months of this year imports of mutton and lamb into the United Kingdom were by about 10 per cent higher than in the corresponding period of 1962, due mainly to larger receipts from New Zealand. Exports from Australia have also been increasing in recent months on account of larger shipments both to the United Kingdom and the United States.

GENERAL AGREEMENT ON TARIFFS AND TRADE

ACCORD GENERAL SUR LES TARIFS DOUANIERS ET LE COMMERCE

RESTRICTED

Spec(63)207
1 July 1963

GROUP ON MEAT - GROUPE DE LA VIANDE

ESTIMATED VOLUME OF EXPORTS OF MEAT FROM SELECTED COUNTRIES NON MEMBERS OF THE MEAT GROUP IN 1960 AND 1961
ESTIMATION DU VOLUME DES EXPORTATIONS DE VIANDE EN PROVENANCE DE CERTAINS PAYS NON-MEMBRES DU GROUPE DE LA VIANDE, 1960 ET 1961

(thousand tons - milliers de tonnes)

Country - Pays	Year Année	Live cattle Bovins	Beef & veal Viande de boeuf et de veau	Mutton & lamb Viande de mouton et d'agneau	Live pigs[a] Porcins[a]	Pork Viande de porc	Prepared and canned meat Viandes préparées et en conserve	Total
Yugoslavia - Yougoslavie	1960	17	16	2	3	19	30	87
	1961	26	30	3	1	19	35	114
Canada	1960	63	8	-	-	23	21	115
	1961	115	13	-	-	16	15	159
Ireland - Irlande	1960	140	48	10	-	2	8	208
	1961	185	75	7	-	3	7	277
Poland - Pologne	1960	6	2	-	24	2	84	118
	1961	3	22	1	52	32	87	197

Note: The data in the table above refer to carcass weight. As regards live animals, national statistics generally report numbers of animals exported which had to be converted into meat equivalent. Due to the lack of exact information as regards the weight of exported animals, these conversions may not always be very precise.
Les chiffres du présent tableau sont exprimés en poids de viande en carcasse. Dans le cas des animaux vivants, les statistiques nationales enregistrent en général le nombre d'animaux exportés et une conversion en équivalent de viande a dû être faite. Etant donné le manque d'informations précises sur le poids des animaux exportés vivants, cette conversion est assez imprécise.
Source: FAO Trade Yearbook 1962 - Annuaire du commerce 1962.

HISTORICAL RECORDS
Genre "capsicum" ou "pim

GENERAL AGREEMENT ON
TARIFFS AND TRADE

CONFIDENTIAL

Spec(63)208/Rev.1
3 July 1963

Group on Meat

POINTS FOR DISCUSSION SUGGESTED BY THE SECRETARIAT

1. Products included in discussion

The discussion would centre on meats of cattle and sheep, it being understood that live cattle and other types of meat might be brought into consideration at a later stage.

2. Agricultural policies

The discussion should cover the whole range of agricultural policies in importing and exporting countries, in particular production policies including internal measures and measures at the frontier, where appropriate.

Internal measures

The discussion should include questions of

- restraint on price and/or income support, so as not to unduly encourage domestic production nor discourage increases in consumption,

- disparities of consumption levels in different countries.

Measures at the frontier

The discussion should include questions of

- negotiability of variable levies, quantitative restrictions, minimum import prices and other import barriers,

- veterinary restrictions.

3. International trade

The discussion should include questions of international prices and the creation of acceptable conditions of access.

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SECRETARIAT DOCUMENT
genre "capsicum" ou "pim"

Access

The discussion should include questions of

- maintaining a balance between domestic production and imports,
- opportunities for exporting countries to compete for participation in meeting market demand,
- elimination of discrimination in opportunities for access,
- market sharing arrangements, including provisions for co-ordinated access for traditional suppliers and participation of new suppliers,
- assurances of supply.

International prices

The discussion should include questions of

- stabilization of international prices through measures aiming at a co-ordinated balance between world supplies and demand, or through measures directly affecting international prices, such as minimum prices, price ranges, etc.,
- a gradual elimination of export subsidies.

4. Other matters for discussion

- procedures for confrontation on production, import and export policies,
- other procedural questions,
- the possibility of concluding local agreements between the States principally concerned with a particular market,
- the necessity for interim arrangements,
- surplus disposal and market development,
- methods of formalizing within the framework of the Trade Negotiations the eventual results of the Group's discussions.

ACCORD GENERAL SUR LES TARIFS DOUANIERS ET LE COMMERCE

CONFIDENTIEL

Spec(63)208/Rev.1
3 juillet 1963

Groupe de la viande

POINTS A EXAMINER - SUGGESTIONS DU SECRETARIAT

1. Produits à examiner

L'examen porterait essentiellement sur les viandes de boeuf et de mouton; toutefois, la discussion pourrait être étendue par la suite au bétail sur pied et à d'autres types de viandes.

2. Politiques agricoles

L'examen devrait porter sur toute la gamme des politiques agricoles des pays importateurs et exportateurs, et en particulier sur les politiques de production, y compris les mesures d'ordre intérieur et les mesures appliquées à la frontière, le cas échéant.

Mesures d'ordre intérieur

L'examen devrait porter sur les questions suivantes:

- limitation du soutien des prix ou des revenus, afin de ne pas encourager indûment la production intérieure ni décourager les accroissements de la consommation,
- disparités entre les niveaux de consommation des différents pays.

Mesures appliquées à la frontière

L'examen devrait porter sur les questions suivantes:

- négociabilité des prélèvements variables, des restrictions quantitatives, des prix minimaux à l'importation et des autres obstacles à l'importation,
- restrictions d'ordre vétérinaire.

3. Commerce international

L'examen devrait porter sur les questions de prix internationaux et sur celles qui sont liées à la création de conditions acceptables d'accès.

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TROPICAL PRODUCTS
genre "capsicum" ou "pim

Accès

L'examen devrait porter sur les questions suivantes:

- maintien d'un équilibre entre la production intérieure et les importations,
- possibilités offertes aux pays exportateurs de faire acte de concurrence en vue de bénéficier pour une part de la demande du marché,
- suppression de la discrimination en matière de possibilités d'accès,
- arrangements pour le partage des marchés, y compris dispositions en vue d'un accès coordonné pour les fournisseurs traditionnels et d'une participation de fournisseurs nouveaux,
- garanties d'approvisionnement.

Prix internationaux

L'examen devrait porter sur les questions suivantes:

- stabilisation des prix internationaux au moyen de mesures qui viseraient à établir un équilibre coordonné entre l'offre et la demande mondiales, ou de mesures qui agiraient directement sur les prix internationaux, comme la fixation de prix minimaux, d'éventails de prix, etc.,
- élimination progressive des subventions à l'exportation.

4. Autres questions à examiner

- procédures de confrontation des politiques de production, d'importation et d'exportation,
- autres questions de procédure,
- possibilité de conclusion d'accords locaux entre les Etats principalement intéressés à un marché particulier,
- nécessité de conclure des arrangements intérimaires,
- écoulement des excédents et développement du marché,
- méthodes à appliquer pour donner un caractère formel aux résultats finals des débats du Groupe dans le cadre des négociations commerciales.

GENERAL AGREEMENT ON TARIFFS AND TRADE

CONFIDENTIAL

Spec(63)224
22 July 1963

Group on Meat

The Group on Meat, after its discussion at the meeting of 1-5 July 1963, requested the secretariat to prepare a summary record of the discussions. A draft summary record is hereby circulated to the members of the Group. Comments by delegations on the statements attributed to them are invited before the end of August 1963.

DRAFT

Summary Record of the Discussion 1-5 July 1963

Introduction

1. The Group met in Geneva from 1-5 July 1963 in order to initiate its work on the basis of the instructions by the Ministers. Papers had been submitted to the Group by the Governments of Argentina (Spec(63)206), Australia (Spec(63)197), New Zealand (Spec(63)203), and the United Kingdom (Spec(63)190). A list of points for discussion was suggested by the secretariat and amended in the light of the comments made at the meeting (Spec(63)208/Rev.1).

Introductory statements

2. The representative of the United Kingdom introduced the paper submitted by his delegation. His statement has been circulated to the Group as document Spec(63)195.

3. The representative of the EEC explained the position of his delegation. While the EEC was in principle prepared to study all aspects of the meat problems, his delegation was not in a position to take part substantively in the present discussion, since no common policy for beef and veal had as yet been established. A communication by the EEC had been circulated as document Spec(63)191.

4. The representative of Australia in introducing the paper submitted by his delegation described the importance to exporting countries of trade in meat. He stressed that vast areas in his country relied solely on cattle raising, so that it would not be practicable to restrain production in such cases. In relation to access, the problems of internal assistance in the major importing areas and of protective barriers at the frontier would have to be considered. The question of international prices at a level remunerative for efficient producers was also part of the problem. He expressed doubt as to the practicability of a system of minimum import prices as suggested by the United Kingdom, but this needed to be explored further. Other issues, such as the implications of veterinary regulations, were also important and should be considered. He felt that participating countries should undertake not to take action which would aggravate the international trade problems for meat.

5. The representative of New Zealand introduced the New Zealand paper and stated that, in his view, the aim of the work of the Group should be to provide opportunities for the efficient exporting countries to increase their export earnings to the maximum extent consistent with their ability to provide meat at competitive prices. Although he considered that it was not unreasonable to expect the normal application of the rules of GATT, he realized that the modification of internal meat policies was a politically sensitive matter. Conditions of access had to be created in such a way that they were acceptable to all parties concerned. He went on to say that, because of the great variety in type, price and quality of meat products, there was not one international meat market but a series of different markets which were more or less related. The specific problems of each market had to be considered. The differences in levels of consumption as between various countries and the factors which led to these disparities also required consideration. He expressed concern about the present trend in production, particularly in importing countries. Such production increases would certainly have an impact on the position of traditional exporters. The Group at this stage was not in a position to start substantive discussions on an international meat agreement, but in any case a market sharing arrangement as suggested by the United Kingdom would not be acceptable to his delegation since this would mean a standstill instead of a development of the market.

6. The representative of Argentina briefly summarized the paper presented by his delegation. He stressed the fact that there were three main import markets for meat. These had very differing characteristics, which would make it impossible to establish a single set of criteria for the development of international trade in meat. As regards the objectives of any arrangements, a distinction should be made between long-term, medium and short-term objectives. The Argentinian suggestions in this respect were spelt out in document Spec(63)206. While agreement would have to be reached on any long-term objectives, particular arrangements could be designed in order to reach the medium or short-term objectives for specific meats for which there were special problems.

7. The representative of Uruguay also felt that for exporting countries, the essential aim was to receive treatment which was in conformity with the provisions of GATT. Nevertheless, his delegation was prepared to consider other solutions which would lead to acceptable conditions of access; it was obvious that this meant an expansion of the market and of trade in meat. The question whether the problems of international trade in meat could be solved by the conclusion of an international meat agreement would have to be carefully considered.

8. The representative of the United States made a statement which was circulated to the Group as document Spec(63)211.

9. The Group proceeded with its discussions on the basis of a list of points suggested by the secretariat and circulated as document Spec(63)208/Rev.1.

Products included in the discussions

10. The discussion concentrated on meat of cattle and sheep. It was understood that live animals and other types of meat would be borne in mind and might, as appropriate, be brought into discussion at a later stage.

Agricultural policies

Internal measures

11. The representative of New Zealand drew attention to the statement made in the paper submitted by his delegation that, unless the tendency towards self-sufficiency in some major import markets was checked, a serious situation could be foreseen for meat exporting countries. The objective of achieving an improvement in the conditions in access to the world's major existing or potential meat import markets implied a reduction or limitation of present and prospective levels of protection.

12. The representative of the United Kingdom recalled that the paper submitted by his delegation included the concept of restraint on price support.

13. The representative of Australia regarded the question of internal measures as part of the conditions of access. He pointed out that the volume of meat entering into international trade was only small in relation to meat production

in the large importing countries, so that, even taking into account possible increases in consumption, a relatively small increase in production in the large importing countries could have a disproportionately large adverse effect on international trade. He stressed that, at an appropriate stage, all aspects of national policies affecting meat production would have to be considered.

14. The representative of New Zealand, commenting on the existing disparities in consumption levels as between different countries, expressed the view that many of such disparities were the consequence of import policies of the importing countries. He would expect importing countries eventually to undertake certain commitments as regards the height of the domestic support price level; the height of production subsidies; a limitation of their price or income support to a certain negotiated standard quantity; and as regards any other measures affecting production or price policies.

15. The representative of the United Kingdom stated that the per capita beef consumption in his country since the abolition of rationing had not shown such an increase as was expected and it was still below the pre-war average. Consumption of mutton was fairly stable; on the other hand consumption of pig meat and poultry had increased substantially. The present situation was such that relatively small increases in meat supplies led to a quite disproportionate fall in prices.

16. The representative of Uruguay stressed the importance of examining, during the Group's further work, the relationship between domestic consumption and availabilities and prices.

17. The representative of the United States explained that beef imports into his country consisted predominantly of frozen boneless meat for manufacturing, a type of meat for which there was a strong demand inadequately covered by domestic supplies.

18. The representative of Argentina drew attention to the fact that the disparities in consumption as between the various countries were not in keeping with disparities in income levels. Other factors such as availabilities of animal proteins from various sources and problems of distribution and marketing

also affected meat consumption. He expressed the hope that importing countries would supply information regarding these aspects for the benefit of the further work of the Group.

19. The representative of the EEC gave some details about projections of consumption, production and imports of beef for the Community in 1970. These projections were based on the assumption inter alia of an average increase in population in the whole Community of 8.7 per cent over the period 1958-1970, and a development in income of 4 per cent annually. The projections showed an estimated increase in total beef consumption in the Community during this period of 1,736,000 tons from 3,285,000 tons in 1958 to 5,021,000 tons in 1970. There were, however, appreciable variations in the increase per member State, ranging from 4 per cent in Belgium and Luxemburg to 38 per cent in Italy. The projection for the average per caput consumption in 1970 was 19.5 kilogrammes per year, which was still less than the per caput consumption in countries like Denmark and the United Kingdom. It was estimated that total beef production during this period would increase from 3,032,000 tons in 1958 to 4,682,000 tons in 1970, an increase of some 55 per cent. These figures would leave room for total net imports into the Community to increase to 339,000 tons, which meant an increase of 81,000 tons as compared to total beef imports of 258,000 tons in 1958. Imports would however vary greatly between the member States. He stressed that such figures should be used only with great caution. Beef production, for example, was closely related to dairy production and would, therefore, depend not only on developments in the meat sector but also on the dairy situation. Furthermore, the projections were based on certain price assumptions. Variations in price would have an appreciable bearing on the figure for consumption and it was impossible to make any predictions about the price level in the Community in 1970.

International trade

Access

20. The representative of Denmark stressed the close relationship between the problem of reducing the great variety of protective measures and the problem of the establishment of a fair and stable price level in international trade in meat.

TROPICAL PRODUCTS
Withdrawn
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All countries, both importers and exporters, endeavoured to secure a more fair and stable income for their producers. It was for consideration whether there was a possibility of co-ordinating the various systems in such a way as to provide a fair balance in the rights and obligations of the participating countries. Another question was whether importing countries were prepared to adapt their systems of protection so as to bring the degrees of protection in these countries more in line with one another.

21. The representative of New Zealand stated that the extent to which his country received improved terms of access would determine its participation in the Trade Negotiations as a whole. It was essential, in his view, for importing countries to modify the internal policies which encouraged high cost production, so as to leave room for trade to expand on a more satisfactory basis. He recognized, however, that this could only be achieved as a long-term objective. In the meantime, it was essential that present trade conditions should not deteriorate and that importing countries should gradually bring the terms of access more in line with their obligations under the GATT. In this connexion, he referred to the findings of Committee II which stated in its third report that world meat trade conditions were favourable for the relaxation, indeed for the removal, of barriers to trade. In particular, as regards trade in mutton and lamb, it was found that the removal of restrictions on imports was unlikely to result in a sudden or large increase in imports. He pointed out that there were no important stocks of meat, nor would it be possible to increase production so rapidly that markets might be disrupted. He further stated that his delegation opposed the concept of a balance between domestic production and imports, whereby domestic producers would have a pre-emptive right to market their products within the country. The question of price was important in this connexion and he felt that prices should be set at a level remunerative for efficient producers; the level should not be such as to leave high cost production unchecked. As regards the question of opportunities for exporting countries to compete for participation in meeting market demand, this question would not arise if import barriers were sufficiently relaxed.

22. The representative of Australia expressed the view that where countries only afforded protection by means of a tariff, the level of these tariffs could be subject to negotiations. Similarly, where protection was afforded by various measures, such as internal measures and measures at the frontier, negotiations would only be meaningful if countries were prepared to undertake commitments as regards these measures, to the extent that they had implications for international trade. The conditions of entry had to be predictable and the degree of protection had to be known in advance. Furthermore, the negotiations should not just aim at maintaining the current situation but should lead to increasing shares for exporting countries. It would not be acceptable if imports were regulated only in accordance with fluctuations in internal demand or production. Obligations undertaken by industrialized importing countries in this field should be comparable to the kind of concessions these countries expected to receive in the trade negotiations for their industrial exports. As regards the question of the elimination of discrimination in opportunities for access, he emphasized that this should apply not only to discrimination in quantitative terms and in the capacity to compete, but also to the situation whereby there was discrimination between different meat products. He further expressed the view that future discussions, after agreement had been reached on certain principles, should deal with the means by which these principles were to be implemented and also with the level of prices, namely the international prices in the absolute sense and the relationship between internal producer and consumer prices. The exporting countries, on the other hand, should be prepared to consider undertakings in respect of assuring regular supplies and avoiding disruption of the major import markets.

23. The representative of Uruguay stressed the importance of eliminating the uncertainty about measures at the frontier. Any solution should give producer countries the possibility of carrying out reasonable production planning. This would facilitate the maintenance of a fairly stable level of production, which would be beneficial both to exporters and importing countries. As regards measures which were currently maintained inconsistly with the GATT, he expressed his understanding that such measures would be included in the negotiations but that exporting countries would not be expected to grant concessions in return

for commitments in regard to such measures undertaken by the importing countries concerned. As regards the maintenance of veterinary restrictions, he did not contest the legitimacy of such restrictions but in the work of the Group consideration should be given to ways and means of ensuring that such regulations in their operation would not have unduly restrictive effects.

24. The representative of the United Kingdom stated that his Government wanted to see trade preserved with its traditional suppliers. On the other hand domestic meat production constituted a very important part of meat supplies in the United Kingdom, while, furthermore, assurances against deficiencies in supply were necessary. He pointed out that, by its nature, it was not possible to change the level of meat production suddenly. Neither would it be desirable to have sudden changes in imported supplies; these would bring about quite disproportionate changes in prices. For these reasons the United Kingdom suggested the maintenance of a certain balance between domestic and imported supplies. As regards deficiency payments he stated that, while the United Kingdom wished to see a reduction in the total amount of its deficiency payments, it was not in favour of doing so by means of forcing prices upwards. This would have quite considerable implications in other economic sectors. The new policy the United Kingdom Government now had under consideration would provide for some restraint on home production, some guarantee as to the level of access and assurances as regards the participation of exporters in any expansion in the market.

25. The representative of the United States expressed the view that arrangements should be worked out which were sufficiently flexible to meet the specific requirements of different markets. In the interim period, importers should refrain from any action which would adversely affect trading opportunities. Any arrangement, however, should apply equally to all countries concerned and there should be no question of formalizing a distinction between countries which strictly abide by the rules of GATT and those to which more relaxed standards would apply. His Government's policy of free access for meat imports into the United States would greatly depend on whether other markets remained open or were being opened so as to afford room for expansion of trade, and secondly, on exporting countries conducting careful marketing policies.

26. The representative of Argentina repeated the long-term objectives on which, in his view, agreement should be reached. Among these objectives were the establishment of competitive marketing and the elimination of trade restrictions contrary to GATT; the promotion of efficient meat production and the discouragement of high cost production, having regard to a reasonable balance between world supply and demand; and a fair and equitable participation in import markets. He felt that a major contribution should be expected from countries where, through the maintenance of high producer prices, domestic demand was discouraged and the entry of imports was impeded. He expressed some doubt whether a limitation of the guarantee to a certain quantity would allow sufficiently for the entry of imports from efficient suppliers. Exporting countries might also be expected to contribute to the final objectives. If the conditions of access were in line with the long-term objectives, exporting countries would have to undertake commitments regarding assurances of a regular and orderly supply.

27. The representative of New Zealand enumerated various ways by which importing countries discriminated against other countries, groups of countries or against particular types of meat. He stressed the importance of eliminating such practices. He opposed the principles of market sharing and co-ordinated access and expressed the view that new suppliers should compete for a share in the market without distorting their competitive position by means of export subsidies. It was premature to consider a proposal for market sharing in isolation. Such proposals needed much more examination. He emphasized that conditions of trade should be known and predictable. This applied to such devices as tariffs, variable import levies, minimum import prices, etc. He pointed out that even with a fixed and negotiated minimum import price, it could happen that domestic prices fell below this price so that imports could no longer compete. He also stressed the desirability of examining veterinary regulations so that such regulations would not be used as restrictive or discriminatory devices.

TROPICAL PRODUCTS
Film no. microfiche cases
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28. The representative of the United Kingdom recognized that a system of market sharing as suggested by his delegation might not be applicable to all markets. His Government wanted to keep any arrangement as flexible as possible but, in the present situation of free access and unchecked domestic production, the United Kingdom felt obliged to take action. His delegation would like to see an arrangement which brought stability to the trade in meat and afforded the United Kingdom an opportunity to meet its domestic difficulties.

International prices

29. The representative of Australia, addressing himself to the question of international prices, pointed out that in the present situation where there were only a few residual markets, world prices fluctuated widely and were not remunerative for efficient producers over a sufficiently long period. This was partly because of increasing quantities of subsidized domestic supplies coming on the market and because of imports from countries granting export subsidies. Any arrangement should be such that the burden of low prices would not simply be put on efficient exporters. He also pointed out that currently there was a great disparity in prices on different markets. Therefore, there should be a closer relationship between various markets in order to avoid diversion of trade to the more remunerative markets and in order to achieve a more stable world price.

30. The representative of Argentina expressed the view that any arrangement should be based on realistic and remunerative prices for all countries, so that, while the interests of domestic producers were protected at a reasonable but not artificial level, the interests of exporters were safeguarded at the same time. Such an equalization of interests implied a limitation of the overall volume of subsidized production. Exporting countries should be prepared to exercise a certain discipline as regards their exports and should undertake to eliminate export subsidies. Importers, on the other hand, should accept a commitment not to purchase subsidized meat.

31. The representative of Uruguay stressed the necessity of eliminating the present uncertainty regarding conditions of access on the major markets. This situation gave rise to particular difficulties for the exporting countries.

He supported the ideas expressed concerning the improvement of relations between the various markets by removing restrictive practices and equalizing import conditions. He also supported the principle of the removal of export subsidies.

32. The representative of the United Kingdom felt that it would not be possible to have a uniform international price for meat. Too many factors had an influence on the price. Changes in price would have an immediate effect on consumption and a rapid increase in prices would bring about a decline in consumption and consequently reduce access opportunities. Furthermore, costs of production in efficient producing countries depended on differences in price and cost levels. He agreed with the principle of stable prices. In the United Kingdom, prices had been highly unstable because of unexpected arrivals. Exporting countries should undertake commitments as regards phasing of supplies to import markets so as to avoid sudden peaks. The establishment by exporters of an efficient marketing intelligence service might be considered in this connexion.

33. The representative of Australia, while agreeing that a rapid price increase would adversely affect consumption, pointed out that present prices were unsatisfactory for efficient producers. In his view prices would not necessarily have to be the same in all countries. While recognizing the need for an arrangement to phase supplies in an orderly manner, he pointed out that the present situation did not result only from fluctuations in imports.

Other matters for discussion

34. The representative of New Zealand favoured the establishment of confrontation procedures. Several commitments undertaken both by importers and exporters, arising from the trade negotiations as a whole, could be dealt with in such procedures. Also questions of disorderly supplies and assurances for regular supplies could be discussed during such confrontations.

35. The representative of Australia also supported the establishment of confrontation procedures. If obligations were sufficiently specific, appropriate confrontation procedures could be of much value.

TROPICAL PRODUCTS

36. The representative of the United Kingdom doubted whether a single agreement was appropriate for dealing with the various aspects of different markets. He felt that at a later stage the possibility of having some sub-agreements within the framework of an overall agreement should be considered.

37. The representative of Argentina supported the establishment of confrontation procedures through which, in the light of developments, the need for any corrective measures should be considered.

38. The representative of the United Kingdom stated that in the period before any arrangement was finalized, his country would be unable to avoid taking measures of the kind suggested in the United Kingdom paper. His Government, in taking such interim measures, would take into account the views expressed by members of the Group and would like to see these measures eventually incorporated in, or replaced by, an international arrangement.

39. The representative of Australia, supported by some other members of the Group, emphasized the desirability of countries not taking any action which would involve new elements of a restrictive character in advance of a substantive discussion by the Group. Such action could have a prejudicial effect as regards the kind of arrangement which might come out of the Group.

40. The representative of Australia, in addressing himself to the question of surplus disposal and market development, expressed the view that currently there seemed to be little scope for developing new markets. The low level of income in many countries and dietary habits were great impediments and it had to be recognized that any development of new markets would be in line with the economic and industrial development of these countries.

41. The representative of Argentina stated that surpluses in the meat trade were only temporary and of a short-term character. If access opportunities were improved, there would be no structural surpluses.

Membership of the Group

42. The Group received an application by the Government of Yugoslavia for membership of the Group and invited the representative of Yugoslavia to present its case. The Group welcomed the application and accepted it on the grounds

that from the outset Yugoslavia had shown a keen interest in the work of the Group, as evidenced by the fact that prior to the first meeting of the Group on Meat, it had presented a request to the Trade Negotiations Committee to participate in that work. In addition, it was apparent from the statement by the Yugoslav representative and from that country's foreign trade statistics that Yugoslavia had a substantial interest in trade in meat.

Programme of work

43. It was agreed that the aim should be to advance the work of the Group to the stage where early in 1964, substantive negotiations might be begun in accordance with the terms of reference of the Group.

44. Although the EEC did not take part in the substantive discussion, its position was clarified in regard to the programme of work, the EEC representative expressing the hope that the Group would not meet again except to the extent that the Community regulations on meat of the bovine species had been drawn up in final form.

45. Most members of the Group made it clear that they attached great importance to the next meeting of the Group being held in the autumn and it was essential for the successful prosecution of the work of the Group that all members should then be in a position to discuss the relevant questions of substance.

46. It was agreed that the actual date of the next meeting should be determined by the Chairman in consultation with the members of the Group but that the aim should be as mentioned above, for the next meeting to take place in the coming autumn.

GENERAL AGREEMENT ON TARIFFS AND TRADE

CONFIDENTIAL

Spec(63)308
27 November 1963

Group on Meat

DRAFT

ELEMENTS FOR CONSIDERATION IN THE NEGOTIATIONS

1. The Group had a meeting on 26 November 1963 in which it listed elements to which consideration should be given in negotiations for a general arrangement on meat. It was generally accepted that in agreeing on this list, no member of the Group prejudiced its position on a particular point and the Group noted the position of the European Economic Community which had not yet defined a common policy for some of the products considered.

2. It was agreed that at the next meeting of the Group, all members would be prepared to participate fully in the negotiations, in line with the Decisions taken by Ministers in May 1963 to create acceptable conditions of access to world markets for meat in furtherance of a significant development and expansion of world trade in meat. It was agreed that all relevant elements in the following list would be taken into consideration in the negotiations.

(a) Products included in the negotiations

The negotiations would relate initially to meats of cattle and sheep, it being understood that live cattle and other types of meat would be brought into consideration as appropriate and necessary.

(b) Agricultural policies

All relevant elements of national policies relating to meat in importing and exporting countries, in particular production policies, including:

(i) Internal measures

- internal support policies and other organization measures as they affect levels of domestic production and consumption.

AGRICULTURAL PRODUCTS
Annexe "Capsicum" ou "genre Capsicum"

(ii) Measures at the frontier

- import duties and charges including variable levies; where appropriate quantitative restrictions; minimum import prices and other import barriers.

(c) International trade

(i) Access

- relationship between domestic production and imports,
- opportunities to compete for participation in meeting market demand,
- reduction and elimination of discrimination in opportunities for access.

(ii) International prices

- levels of international prices,
- stabilization of international prices through measures aiming at a co-ordinated balance between world supplies and demand, or through measures directly affecting international prices, such as minimum prices, price ranges, etc.,
- elimination of export subsidies.

(iii) Assurances of supply by exporting countries

(d) Other matters

- procedures for confrontation on production, import and export policies,
- other procedural questions,
- the possibility of concluding between the States principally concerned with a particular market local agreements, including for example, provisions for co-ordinated access for traditional suppliers and for domestic producers and participation of new suppliers,
- interim arrangements,
- surplus disposal and market development,
- disparities of consumption levels in different countries,
- veterinary, health and similar regulations.

3. The Group recognized that the negotiations were an integral part of the trade negotiations as a whole, which were due to commence on 4 May 1964. In order to fit in with the time-table for the general trade negotiations and in view of the fact that negotiations in the Group would necessarily be lengthy and complicated, it was agreed that a negotiating meeting should begin as early as practicable in 1964. A precise date would be left to the Executive Secretary to determine, in consultation with the members of the Group, but it was hoped that this meeting would be scheduled to commence in late February.

TROPICAL PRODUCTS

GENERAL AGREEMENT ON
TARIFFS AND TRADE

RESTRICTED
Spec(64)84
16 April 1964

Group on Meat

LIST OF PRODUCTS

This draft list is submitted to the members of the Group on Meat for their assistance in selecting and identifying products which they might consider it desirable to include in the negotiation of world arrangements.

01.02	Live animals of the bovine species
01.03	Live swine
01.04	Live sheep and goats
01.05	Live poultry, that is to say, fowls, ducks, geese, turkeys and guinea fowls
02.01	Meat and edible offals of the animals falling within heading No. 01.01, 01.02, 01.03 or 01.04, fresh, chilled or frozen
02.02	Dead poultry (that is to say fowls, ducks, geese, turkeys and guinea fowls) and edible offals thereof (except liver), fresh, chilled or frozen
02.06	Meat and edible meat offals (except poultry liver), salted, in brine, dried or smoked
16.01	Sausages and the like, of meat, meat offal or animal blood
16.02	Other prepared or preserved meat or meat offal

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ARTIFICIAL PRODUCTS
Animaux [illegible] genre "capsicum" ou "pim

ACCORD GENERAL SUR LES TARIFS DOUANIERS ET LE COMMERCE

RESTRICTED
Spec(64)84
1er avril 1964

Groupe de la viande

LISTE DE PRODUITS

Ce projet de liste est soumis aux membres du Groupe de la viande aux fins de sélection et d'identification des produits que le groupe estimerait souhaitable d'inclure dans la négociation d'arrangements mondiaux.

01.02	Animaux vivants de l'espèce bovine
01.03	Animaux vivants de l'espèce porcine
01.04	Animaux vivants des espèces ovines et caprines
01.05	Volailles vivantes de basse-cour
02.01	Viandes et abats comestibles des animaux repris aux nº 01.01 à 01.04 inclus, frais, réfrigérés ou congelés
02.02	Volailles mortes de basse-cour et leurs abats comestibles (à l'exclusion des foies) frais, réfrigérés ou congelés
02.06	Viandes et abats comestibles de toutes espèces (à l'exclusion des foies de volaille) salés ou en saumure, séchés ou fumés
16.01	Saucisses, saucissons et similaires, de viandes, d'abats ou de sang
16.02	Autres préparations et conserves de viandes ou d'abats

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GENERAL AGREEMENT ON TARIFFS AND TRADE

RESTRICTED
Spec(64)87
16 April 1964

Group on Meat

DRAFT REPORT

1. In the Resolution adopted on 21 May 1963, the Ministers gave directives with a view to the formulation of the rules to govern, and the methods to be employed in, the creation of acceptable conditions of access to world markets for agricultural products in furtherance of a significant development and expansion of world trade in such products. The Ministers considered that in the case of meat, general arrangements might be required and they instructed the Group on Meat to negotiate appropriate arrangements.

2. The Group has held three meetings, from 1 to 5 July 1963, on 26 November 1963, and from 9 to April 1964. Before it were documents presented by the Governments of Argentina (Spec(63)206), Australia (Spec(63)197 and Spec(64)76), the United States (Spec(63)305), New Zealand (Spec(63)203 and Spec(64)78), the Federation of Rhodesia and Nyasaland (Spec(63)285) and the United Kingdom (Spec(63)190).

Objectives

3. The exporting countries declared that arrangements which would not result in a significant expansion of world trade in meat would not satisfy the objective of the Kennedy Round. Furthermore, they pointed out that since the negotiations constituted a whole, there need not necessarily be a balance of advantages between the participating countries and for each of them within the meat arrangements.

TROPICAL PRODUCTS
Working Party on Tropical Products

4. Many countries emphasized that there were several markets for meat with characteristics so different that it would be difficult to establish a uniform set of criteria for the development of international trade in that product. In their view, the Group should examine the particular situation of each import market and each type of meat, with a view to identifying the elements suitable for negotiation and to co-ordinating, where appropriate, the different arrangements between them. The representative of the EEC stated that, in accordance with the Ministerial Resolution, the Community intended to make all agricultural products subject to the same negotiating rules and that it was a matter of priority to determine those rules. With respect to the balance of obligations regarding trade in meat, the Community would wish to see such balance over the whole agricultural sector.

5. The Group has considered in the first instance meats of cattle and sheep; at an early date the Group intends to recommend a more precise definition of the products which it believes should come within its cover. In the light of these discussions, the Group has identified and agreed upon the elements which should enter into the negotiations (TN.64/Me/3).

Agricultural policies and access

6. In accordance with the ministerial directive, the Group has directed its attention primarily to the means of achieving the objective of acceptable conditions of access. The Group was unanimous in recognizing that questions relating to national production policies and to market access were closely related and therefore the negotiations should cover all elements of the question as thus defined.

7. While there was agreement on the broad objectives, it was recognized by the Group that the nature of the trade and the measures of protection and/or support varied significantly from market to market; and that the precise nature of the commitments undertaken may well have to vary from country to country. There is an agreement that the Group seek harmonization of the ends to be achieved while allowing a measure of flexibility as to the means to be adopted in each country for the achievement of these agreed ends. In the view of some members of the Group the objective is in respect to those countries which support their domestic industry to adjust existing levels of support over the whole range of internal support measures affecting trade in order to restrain

production. No attempt has yet been made to determine the precise nature of the commitments which would be undertaken by countries operating such measures. It is accepted, however, that the effectiveness of these commitments might be judged by the resulting level of production. The representative of the EEC expressed the view that the various protective measures in the agricultural sector were indissociable and that the fundamental element of the negotiations lay in the negotiation and binding of the support margin.

8. There is a broad measure of agreement that achievement of the objective of the arrangement will require importing countries to undertake commitments which assure efficient exporting countries access to markets on predictable terms and in meaningful quantities. Such commitments should include the opportunity to share in the growth of consumption.

9. There is a broad measure of agreement on the opinion that frontier barriers to trade of meat importing countries should be open to negotiation. As in the case of internal support measures, the nature and significance of these barriers varies from country to country, and again a pragmatic approach will be necessary.

10. The United Kingdom and the United States representatives stated that their Governments had concluded bilateral agreements with suppliers which would be suitable for incorporation in a world agreement.

11. The EEC representative stated that, in his view, the support margin adequately defined possibilities for access to markets.

International prices

12. It is the general view that the arrangements which emerge from the work of the Group should aim at ensuring stable and remunerative prices for efficient producers whilst being fair to the consumer. The representative of the Community emphasized the importance of the reference price as a stabilizing factor and expressed the view that in negotiating that price, account would have to be taken of the peculiar features of the meat market. Some delegations pointed out that practical difficulties would arise in determining minimum prices for meat entering into international trade.

INTERNATIONAL PEPPERS
Piments (capsicum or pim
genre capsicum ou pim

Assurances of supply

13. For their part, exporters have expressed, in relation to the access commitments undertaken by importing countries, their willingness to consider undertakings in regard to assurances of supply as part of an acceptable arrangement.

Market development

14. While all members of the Group recognized the need to develop new markets as rapidly as possible, they recognized the possibilities in this field as being in most instances of a rather long-term character.

Future procedures

15. It has been proposed that the Group might best proceed by examining each of the products within its terms of reference with a view to negotiating specific arrangements incorporating the elements listed above.

16. In order to carry out this work it will be necessary for the Group to have additional information in regard to conditions in a number of markets. In particular, the Group has noted that the European Economic Community will be submitting for examination by the CONTRACTING PARTIES its regulations on beef and veal. The Group was of the view that an examination of these regulations jointly with Committee II at an early date would be of considerable assistance to the Group in its further work. In addition, the Group has asked the secretariat to prepare an analysis of existing support measures and barriers to trade in the various meat importing countries.

GENERAL AGREEMENT ON TARIFFS AND TRADE

RESTRICTED

Spec(64)87/Add.1
16 April 1964

Group on Meat

DRAFT REPORT

Alternative Text by the Delegations of the United Kingdom and New Zealand to Replace the Present Paragraphs 7 and 8

7. While there was agreement on the broad objectives, it was recognized by the Group that the nature of the trade and the measures of protection and/or support varied significantly from market to market; and that the precise nature of the commitments undertaken may well have to vary from country to country. There is an agreement that the Group seek harmonization of the end to be achieved while allowing a measure of flexibility as to the means to be adopted in each country for the achievement of these agreed ends. In the view of most members of the Group, the objective is in respect to those countries which support their domestic industry to adjust the totality of their policies affecting trade or production so as to provide acceptable conditions of access to their markets for meat exporters. There is a broad measure of agreement that the achievement of the objective of the arrangement will require importing countries to undertake commitments which assure efficient exporting countries access to markets on predictable terms and in meaningful quantities. Such commitments should include the opportunity to share in the growth of consumption. No attempt has yet been made to determine the precise nature of the commitments which will be undertaken by importing countries operating such measures. It is accepted, however, that the effectiveness of these commitments might be judged by the resulting level of trade.

(Then statement on the EEC position).

TROPICAL PRODUCTS

GENERAL AGREEMENT ON TARIFFS AND TRADE

RESTRICTED

Spec(64)89
17 April 1964

Group on Meat

REDRAFT OF THE DRAFT REPORT SUBMITTED BY SOME DELEGATIONS

Objectives

1. In the Resolution adopted on 21 May 1963, the Ministers gave directives with a view to the formulation of the rules to govern, and the methods to be employed in, the creation of acceptable conditions of access to world markets for agricultural products in furtherance of a significant development and expansion of world trade in such products. The Ministers considered that in the case of meat, general arrangements might be required and they instructed the Group on Meat to negotiate appropriate arrangements.

2. The Group has held three meetings, from 1-5 July 1963, on 26 November 1963, and from 9- April 1964. Before it were documents presented by the Governments of Argentina (Spec(63)206), Australia (Spec(63)197 and Spec(64)76), the United States (Spec(63)305), New Zealand (Spec(63)203 and Spec(64)78), the Federation of Rhodesia and Nyasaland (Spec(63)285) and the United Kingdom (Spec(63)190).

Nature of arrangements

3. Many countries emphasized that there were several markets for meat with characteristics so different that it would be difficult to establish a uniform set of criteria for the development of international trade in that product. In

their view, the Group should examine the particular situation of each import market and each type of meat, with a view to negotiating appropriate arrangements. The general arrangement could take the form of a statement of objectives, guidelines and procedures which would be supplemented by more specific arrangements concerning the different markets. The representative of the EEC stated that, in accordance with the Community's interpretation of the Ministerial Resolution, the Community intended to make all agricultural products subject to the same negotiating rules and that it was a matter of priority to determine those rules. Others challenged this interpretation and pointed out that the directive of the Ministers to the Meat Group was to negotiate "appropriate arrangements".

4. The Group has considered in the first instance meats of cattle and sheep; at an early date the Group intends to recommend a more precise definition of the products which it believes should come within its cover. In the light of these discussions, the Group has identified and agreed upon the elements which should enter into the negotiations (TN.64/Me/3).

Agricultural policies and access

5. In accordance with the ministerial directive, the Group has directed its attention primarily to the means of achieving the objective of acceptable conditions of access. The Group was unanimous in recognizing that questions relating to national production policies and to market access were closely related and therefore the negotiations should cover all relevant elements of the question as thus defined.

6. In the view of most members of the Group, those countries which support their domestic industry should adjust the totality of their policies affecting trade and production so as to provide acceptable conditions of access to their markets for meat exporters. There was a broad measure of agreement that to this end importing countries will be required to undertake commitments which assure efficient exporting countries access to markets on predictable terms and for acceptable quantities in accordance with the objectives stated in paragraph 1. Such commitments should include the opportunity to share in the growth of consumption. No attempt has yet been made to determine the precise nature of the commitments which would be undertaken by importing countries. It is accepted, however, that the effectiveness of these commitments would be judged by the resulting level of trade.

7. There was a broad measure of agreement that frontier barriers to trade of meat-importing countries should be open to negotiation. As in the case of internal support measures, the nature and significance of these barriers varies from country to country, and again a pragmatic approach will be necessary.

8. The United States representative stated that his Government had concluded bilateral agreements with its major suppliers, which could be considered for incorporation in a general arrangement. The understanding which the Government of the United Kingdom had already reached with its suppliers of bacon and the further understanding which it expected to seek with its major suppliers of meats of cattle and sheep could also be considered for such incorporation.

9. The representative of the EEC expressed the view that the various protective measures in the agricultural sector were indissociable and that the fundamental element of the negotiations lay in the negotiation and binding of the support margin. In his view, the support margin adequately defined possibilities for access to markets.

International prices

10. It is the general view that the arrangements which emerge from the work of the Group should aim at ensuring stable and remunerative prices for efficient producers whilst being fair to the consumer. The representative of the Community emphasized the importance of the reference price as a stabilizing factor and expressed the view that in negotiating that price, account would have to be taken of the peculiar features of the meat market.

Assurances of supply

11. For their part, exporters have expressed, in relation to the access commitments undertaken by importing countries, their willingness to consider undertakings in regard to assurances of supply as part of an acceptable arrangement.

Market development

12. While all members of the Group acknowledged the need to develop new markets as rapidly as possible, they recognized the possibilities in this field as being in most instances of a rather long-term character.

Future procedures

13. It has been proposed that the Group might best proceed at its next meeting by examining each of the products within its terms of reference with a view to negotiating specific arrangements incorporating the elements listed above.

14. In order to carry out this work it will be necessary for the Group to have additional information in regard to conditions in a number of markets. In particular, the Group has noted that the European Economic Community will be submitting for examination by the CONTRACTING PARTIES its regulations on beef and veal. The Group was of the view that an examination of these regulations jointly with Committee II at an early date would be of considerable assistance to the Group in its further work. In addition, the Group has asked the secretariat to prepare an analysis of existing support measures and barriers to trade in the various meat importing countries.

TROPICAL PRODUCTS

GENERAL AGREEMENT ON
TARIFFS AND TRADE

RESTRICTED
Spec(64)84
16 April 1964

Group on Meat

LIST OF PRODUCTS

This draft list is submitted to the members of the Group on Meat for their assistance in selecting and identifying products which they might consider it desirable to include in the negotiation of world arrangements.

01.02	Live animals of the bovine species
01.03	Live swine
01.04	Live sheep and goats
01.05	Live poultry, that is to say, fowls, ducks, geese, turkeys and guinea fowls
02.01	Meat and edible offals of the animals falling within heading No. 01.01, 01.02, 01.03 or 01.04, fresh, chilled or frozen
02.02	Dead poultry (that is to say fowls, ducks, geese, turkeys and guinea fowls) and edible offals thereof (except liver), fresh, chilled or frozen
02.06	Meat and edible meat offals (except poultry liver), salted, in brine, dried or smoked
16.01	Sausages and the like, of meat, meat offal or animal blood
16.02	Other prepared or preserved meat or meat offal

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AGRICULTURAL PRODUCTS

Unrestricted
Limited circulation
Limited or restricted circulation

ACCORD GENERAL SUR LES TARIFS DOUANIERS ET LE COMMERCE

RESTRICTED

Spec(64)84
16 avril 1964

Groupe de la viande

LISTE DE PRODUITS

Ce projet de liste est soumis aux membres du Groupe de la viande aux fins de sélection et d'identification des produits que le groupe estimerait souhaitable d'inclure dans la négociation d'arrangements mondiaux.

01.02	Animaux vivants de l'espèce bovine
01.03	Animaux vivants de l'espèce porcine
01.04	Animaux vivants des espèces ovines et caprines
01.05	Volailles vivantes de basse-cour
02.01	Viandes et abats comestibles des animaux repris aux n° 01.01 à 01.04 inclus, frais, réfrigérés ou congelés
02.02	Volailles mortes de basse-cour et leurs abats comestibles (à l'exclusion des foies) frais, réfrigérés ou congelés
02.05	Viandes et abats comestibles de toutes espèces (à l'exclusion des foies de volaille) salés ou en saumure, séchés ou fumés
16.01	Saucisses, saucissons et similaires, de viandes, d'abats ou de sang
16.02	Autres préparations et conserves de viandes ou d'abats

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GENERAL AGREEMENT ON TARIFFS AND TRADE

RESTRICTED

Spec(64)131/Rev.1
30 September 1964

Group on Meat

DATA ON TRADE FLOWS AND TRADE MEASURES ON PRODUCTS STUDIES BY THE GROUP ON MEAT

Revision

Explanatory note

1. Under each entry information is provided on six lines. The top line indicates the value of imports, the second line indicates the value of exports; the data are in United States million dollars and relate in general to the average for the years 1960-1962.

2. The third line indicates the level of tariff protection. For items subject to a duty of more than 5 per cent ad valorem the symbol T has been inserted; duties of 5 per cent or less are shown by the symbol t; for zero duties 0 has been inserted. Bound duties are shown by underlining; where the binding applies only to part of the position appearing in the product description, a dotted line has been used. Specific duties, regardless of their level, are shown by the letter S. In cases where either an ad valorem or a specific duty applies, the symbol T/S has been used.

3. The subsequent lines show various non-tariff measures which may be presumed to affect trade. The fourth line shows import restrictions (including quota restrictions and minimum import prices). The fifth line shows subsidies, and the sixth line other non-tariff measures. The following symbols have been used:

R	=	import restrictions
Sp	=	subsidy on production
Se	=	subsidy on exports
Sc	=	subsidy on consumption
Mo	=	State trading
Mb	=	production and/or trade is subject to regulation by a marketing board
Ml	=	product is subject to regulation under "market law"
Lv	=	imports are subject to variable or fixed levy
Dp	=	deficiency payments

02. Dp

TROPICAL PRODUCTS
World no umbrella cereal world or multilateral

Where the initial letter is not capitalized it means either that only part of the item or items concerned benefit from the non-tariff measure mentioned (for example, "r" in the case of import restrictions), or that the measure in question only applies under certain conditions (for example, "lv" in the case of a levy).

4. The asterisks refer to explanatory notes in the Appendix. For example, the symbol "dp*" in the sixth line of the column under "Australia", relating to sub-heading 02.01 A, refers to the note listed in the Appendix under the number 2/3 (where 2 stands for Australia, and 3 for item 3, as indicated in the table).

5. The statistical data in the first and second lines relate to the value of imports from all origins and exports to all destinations; they refer to the average for the years 1960-1962, with the exception of Australia (1960/61 to 1962/63), Israel (1960 and 1962), New Zealand and Uruguay (1960 and 1961). The statistical data for the United Kingdom relating to exports under BTN sub-heading 02.01 A relate to all meat (fresh, chilled and frozen). The statistical data for Austria, Denmark, Norway, Sweden and the EEC relating to BTN items 01.04 and 02.01 B also include live goats and goat meat. Imports are in general at c.i.f. values and exports at f.o.b. values. It should, however, be noted that in the case of Australia, Canada, South Africa and the United States imports are valued f.o.b.; Portuguese figures do not include trade with the Portuguese Overseas Departments. The figures are based on the data published by the United Nations (Yearbook of International Trade Statistics) and national trade returns, and for the European Economic Community, on the compilations by the Statistical Office of the European Communities.

STATISTIQUES DES COURANTS D'ECHANGES ET DES MESURES D'ORDRE COMMERCIAL CONCERNANT LES PRODUITS ETUDIES PAR LE GROUPE DE LA VIANDE/
DATA ON TRADE FLOWS AND TRADE MEASURES ON PRODUCTS STUDIED BY THE GROUP ON MEAT

Positions et sous-positions statistiques de la NB/ Tariff items and statistical sub-headings from the BTN	Produits/ Product Description	Argentine/ Argentina	Australie/ Australia	Autriche/ Austria	Canada	Danemark/Denmark	Commerce intracommunautaire compris/ Including intra-community trade: Belgique-Luxembourg/ Belgium-Luxemburg	France	Rép. féd. d'Allemagne/ Fed. Rep. of Germany	Italie/Italy	Pays-Bas/ Netherlands	Commerce intracommunautaire non compris/ Not including intra-community trade: CEE/EEC ***	Finlande/Finland	Israël/Israel	Japon/Japan	Nouvelle-Zélande/ New Zealand	Norvège/Norway	Pologne/Poland	Portugal	Afrique du Sud/ South Africa	Espagne/ Spain	Suède/Sweden	Suisse/ Switzerland	Turquie/Turkey	Royaume-Uni/ United Kingdom	Etats-Unis/ United States	Uruguay***	Yougoslavie/ Yugoslavia
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27
1) 01.02	Animaux vivants de l'espèce bovine/ Live animals of the bovine species	- 23,2	- 0,7 0	1,9 24,2 0*,S R Ml,Lv	1,8 53,7 S	0,1 63,7 0 r* Sp	1,4 1,4	2,9 19,8	86,9 0,7	54,5 -	7,6 15,3	129,6 12,3 0*,T se lv	- 0,11 0 R lv*	0,8 - 0 R	0,5 0,3 0 r*	0,1 - 0 R	- - 0*,S R	- 5,0 Mo	0,1 - S	0,2 0,7 0**,S r* Mb	0,4 0,2 t*,T/S Mo**	0,1 0,2 0 Se* Lv*	2,3* 3,7* S R sp, se*	- 3,8 0**,T r* Sp	101,1 19,7 0 Sp	88,9 9,1 0*,S	0,4 0,6	1,9 18,7 0 r* sp
2) ex 01.04	Animaux vivants de l'espèce ovine/ Live sheep	- 0,3	- 1,5 0	- - 0*,S	0,5 0,2 S	- - 0 r*	0,1 - se	0,3 1,9 r* se	- 0,3 r* Ml*	0,3 -	- 0,1 Mb	0,6 2,2 0*,T	- - 0 R Lv	0,1 - S R	- - 0	- 0,1 0 R	- - 0*,S R	- 0,1 Mo	- - S	- 0,1 0**,S r* Mb	- 0,4 t*,T Mo**	- - 0 Lv*	- - S R	- 8,7 0**,T r*	4,8 .. 0 sp	0,2 0,8 0*,S	.. ..	0,1 3,7 0 r*
3) 02.01 A	Viandes de l'espèce bovine/ Meats of cattle	- 123,2 r*	.. 133,1 S dp*	2,1 1,2 S,T/S R Ml,Lv	7,0 8,4 S,T/S	0,1 45,5 0 R* Sp	7,5 1,4	16,1 56,2	48,5 12,1	58,1 0,1	8,4 33,4	76,9 37,1 T se,se* lv	2,41 - 0 R Lv	3,2 - S R	2,9 0,1 T r*	- 62,2 T Dp	0,7 1,0 S R	1,2 7,9 Mo	3,6 - S R	- 4,0 S R Mb	9,6 0,1 T Mo	6,9 1,3 0 Se Lv	15,1 - S R	- - T R	201,6 3,2 S,T Dp	204,7 6,5 T/S r*	.. 25,9	- 20,0 T R
4) ex 02.01 B	Viandes de l'espèce ovine/ Meats of sheep	- 11,5 r* dp*	.. 30,5 S	- - S,T/S	6,4 0,1 S sp dp*	0,1 - 0 R	1,5 -	4,4 1,4 r* se	0,4 0,2 R Ml	1,4 -	0,1 4,8 Mb	2,8 1,5 T Lv	- - 0 R	- - S R	6,3 - T	- 131,0 T Dp	0,1 - S R	0,2 0,2 Mo	.. .. S R	- 0,3 S R Mb	0,1 0,2 T Mo	0,3 - 0 Lv	0,5 - S R	- - T R	196,6 .. 0 Dp	13,5 0,7 T/S r*	.. -	- 1,7 T R

ANNEX

1/3,4	Meat other than fresh or chilled
2/3,4	Under the agreement with the United Kingdom, if the average price on the market of that country is lower than the price on the list of minimum prices, the United Kingdom Government is bound to make up the difference by paying a lump sum to the Australian Government, which in turn makes deficiency payments to producers.
3/1,2	Applicable to animals intended for breeding
4/4	Applicable to lamb carcasses
5/1,2	Exception animals intended for breeding
5/3	According to legislation from 1962, fixed minimum prices have been established for sales of beef and veal on the Danish home-market. As, however, prices in the free market since August 1963 have exceeded these minimum prices, the home-market scheme has in fact been suspended from that date as far as beef and veal is concerned.
7/2	Domestic species excluding pure-bred animals for breeding
7/4	Domestic
8/2	Except animals intended for breeding
11/1,2	Applicable to animals intended for breeding
11/3	EEC permit applicable to Luxemburg and valid until 31 March 1967.
12/1	Except buffalo
14/1	Except buffalo
14/3	Except viscera and tongues
16/1,2	Applicable to animals intended for breeding
19/1,2	Relating to the minimum price guarantee
20/1,2	Applicable to animals intended for breeding
21/1	Except buffalo and animals intended for breeding
21/2	Except animals intended for breeding
22/1	Imports consist only of animals for slaughter, while exports relate only to dairy cattle and breeding
23/1,2	Except animals intended for breeding
25/1,2	Applicable to animals intended for breeding

TROPICAL PRODUCTS
Withdrawn from "Minimum" to "Maximum" Agreement

	25/3,4	Agreements concluded between the United States and its principal meat suppliers provide for the voluntary limitation of exports from the latter countries. Also, new legislation provides for the possibility of quotas in certain contingencies
	27/1,2	Relating to the minimum price guarantee
**	19/1,2	Applicable to animals intended for breeding
	20/1	Applicable to bovine animals except for breeding or fighting
	22/1	Applicable to beef cattle
	23/1,2	Applicable to animals intended for breeding
***	26	This column does not contain data relating to tariff and non-tariff measures
	11	This column takes into account regulation No. 14/64/EEC on "the progressive establishment of a common organization of the market in beef and veal" which will come into effect on 1 November 1964.

CONFIDENTIEL

11 octobre 1965

QUESTIONS DONT L'EXAMEN EST PROPOSE AUX GROUPES DE LA VIANDE ET DES PRODUITS LAITIERS

Dès les débuts des négociations sur la viande et les produits laitiers, il faudra probablement procéder à des études sur un certain nombre de points techniques intéressant ces négociations. Le Groupe de la viande et celui des produits laitiers se sont accordés sur certains éléments dont il conviendrait de tenir compte dans les négociations. Dans la mesure où il sera possible de délimiter certains ensembles de questions à étudier, il y aurait apparemment intérêt à entamer ce travail avant que les négociations ne commencent véritablement une fois les propositions déposées. A cet effet, les groupes pourraient se réunir pendant une semaine dans le courant de novembre.

S'agissant du Groupe de la viande, il conviendrait d'entreprendre une étude en commun portant sur la viande de boeuf, d'après les documents présentés par chaque délégation et concernant les points suivants:

1. Eléments pertinents des politiques nationales appliquées à la viande de boeuf, en particulier les politiques de production, au cours d'une période représentative.

2. Chiffres et projections permettant à chaque participant de se faire une opinion sur les tendances probables de la production, des offres à la vente et des besoins d'importation.

   a) les chiffres (en tonnes métriques) devraient concerner la production, la consommation, les exportations et les importations des quinze dernières années; il conviendrait d'y inclure, dans les cas appropriés, une moyenne pour cinq années d'avant-guerre;

   b) il y aurait lieu de joindre à ces chiffres un exposé descriptif et un commentaire des tendances et des évolutions qu'ils dénotent;

   c) il y aurait lieu de donner des indications sur les tendances probables de la production, de la consommation, des importations et des exportations jusqu'en 1970; dans la mesure du possible, ces indications devraient être complétées par d'autres concernant les plans à venir.

S'agissant du Groupe des produits laitiers, il conviendrait d'entreprendre une étude en commun portant sur le beurre, d'après les documents présentés par chaque délégation et concernant les points suivants:

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1. Eléments pertinents des politiques nationales, notamment les niveaux des recettes des producteurs laitiers dans les pays exportateurs et importateurs principaux, et prix effectifs du beurre dans le commerce international durant une période représentative, moyens de résoudre le problème des offres faites à des prix artificiellement bas sur le marché international.

2. Chiffres et projections permettant à chaque participant de se faire une opinion sur les tendances probables de la production, des offres à la vente et des besoins d'importation.

   a) les chiffres (en tonnes métriques) devraient concerner la production, la consommation, les exportations et les importations des quinze dernières années; il conviendrait d'y inclure, dans les cas appropriés, une moyenne pour cinq années d'avant guerre;

   b) il y aurait lieu de joindre à ces chiffres un exposé descriptif et un commentaire des tendances et des évolutions qu'ils dénotent;

   c) il y aurait lieu de donner des indications sur les tendances probables de la production, de la consommation, des importations et des exportations jusqu'en 1970; dans la mesure du possible, ces indications devraient être complétées par d'autres concernant les plans à venir.

Th. v. Tuyll

GENERAL AGREEMENT ON TARIFFS AND TRADE

CONFIDENTIAL

Spec(65)121
15 November 1965

Group on Meat

NOTE ON AGRICULTURAL POLICIES IN RESPECT OF BEEF AND VEAL IN SELECTED COUNTRIES

The present note prepared by the secretariat intends to give an outline of the agricultural policy systems in respect of beef and veal, and of the main elements of these policies in the countries members of the Group on Meat and some other selected countries. The documentation used and other published material which may be relevant to the discussion is given in an annex to this note.

Argentina

In Argentina no support or protection measures are applied to beef and veal. The National Meat Board is empowered to make proposals to the Government on prices, suggest maxima for cattle and meat exports and for home consumption, and suspend the export of meat and livestock should the supply for domestic consumption be affected. In July 1964 the Government introduced a series of tax reforms designed to improve efficiency and to enhance the attractiveness of cattle raising.

Australia

There is no domestic support for beef and veal in Australia and there are no quantitative import restrictions. There is an import duty of 3d. (m.f.n.) per lb. for beef and veal, preserved by cold process, increased by a primage duty of 10 per cent ad valorem. Imports and exports take place by private traders. The Australian Meat Board, however, among its functions regulates exports of certain types of meat in the interest of the trade as a whole. The Australian Meat Board collects certain levies from producers for the purpose of market promotion and development. The Board also acts as the government agent to distribute to producers any deficiency payments received from the United Kingdom under the Long-Term Meat Agreement. The Agreement which expires at the end of 1967 provides for payments by the United Kingdom Government if the realization prices of Australian meat for the United Kingdom market fall below an agreed schedule of minimum prices. The following are the minimum prices under the Long-Term Agreement for certain grades of meat:

1 October 1961 to 30 September 1967

Frozen beef	(f.o.b. Australia)	
First quality	d. per lb.	US$ per ton
Ox hinds	16.28	335.00
Ox crops	12.69	261.12
Cow hinds	13.41	275.94
Cow crops	11.81	243.01

bring the price at importation increased by the customs duty to the level of the guide price. However, if the "internal market price", determined by the Commission exceeds the guide price by more than 5 per cent no levy is imposed; if it exceeds the guide price by not more than 5 per cent only half of the levy is charged.

The import levy therefore is not necessarily charged always. The normal measure of protection at the frontier is the customs duty. Under the Common External Tariff, which will apply in full as from 1 January 1970, the customs duty will be 16 per cent for live cattle and 20 per cent for beef and veal, fresh, chilled or frozen.

As regards live cattle the duty has been bound at 6 per cent for certain quantities of certain breeds of cattle. Italy has been authorized, until 31 March 1966, to suspend totally the duty on imports of live calves. As regards frozen meat the duty of 20 per cent has been bound for a quota of 22,000 tons. The EEC regulation also provides for the possibility of opening an additional tariff quota at a reduced rate for frozen meat for manufacturing purposes. For the months of November/December 1964 such an additional tariff quota has been opened for 33,000 tons of frozen beef at a duty of 12 per cent. Subsequently, for the period February/September 1965 the duty on frozen beef for manufacturing has been partially suspended to 10 per cent (for Germany 5 per cent up to 6,000 tons). Finally, for the months of October/December 1965 the duty has been reduced to 10 per cent for a quota of 33,000 tons of frozen beef.

In the case of exports, a refund is granted subject to certain maximum limits.

Ireland

With the object of encouraging the planned expansion in cattle output from some 1,126,000 head in 1963 to 1,500,000 head in 1970, a Calved Heifer Subsidy Scheme was introduced in January 1964. Under the scheme a subsidy of £15 ($42) is paid for each calved heifer put into the herd of cows in addition to normal replacement. In the long run, this system should result in an increase in the number of exportable animals, although in the short term, the intention and effect are to encourage producers to keep animals for calving which would otherwise be exported.

A subsidy, equivalent to the payment on cattle under the British Fatstock Guarantee Scheme, was introduced on 1 February 1965, for a six-month period, on exports of carcasses of good quality bullocks and heifers exported to the United Kingdom. This intervention was intended to avoid excessive exports of store cattle and to encourage fattening on the spot.

From the outbreak of war until the end of Government purchase of meat and livestock in the United Kingdom, the price paid by the United Kingdom Government for Irish cattle bore a fixed relationship to that paid for domestic cattle. This has continued since decontrol in the United Kingdom as, under the guaranteed price structure, since 18 April 1960, cattle imported from Ireland and fattened in the United Kingdom for not less than three months are eligible for guarantee payments.

Japan

In Japan meats of cattle are subject to global import quotas and a 25 per cent tariff. There is presently no domestic price support system in force. However, previously there was a livestock price-stabilization programme under which the Government purchased, stored and resold livestock products.

New Zealand

In New Zealand there are no price guarantees or subsidies to beef and veal producers. However, there is a minimum export price scheme. The scheme, which is authorized under the Meat Export Prices Act of 1955, is designed to protect the New Zealand producer from the full effects of any sustained falls in the value of export meat and is financed from the Meat Industry Reserve Account which has been built up by the producers themselves. The scheme is administered by the New Zealand Meat Producers Board on behalf of the Meat Export Price Committee, which comprises a Chairman, nominated by agreement among the interested parties, the Secretary of the Treasury, the Director-General of Agriculture, and two members of the Meat Producers Board nominated by the Board. The Committee has the responsibility of determining, in accordance with the Act, minimum prices for meat exported from New Zealand and has to publish before the beginning of each meat export season a table of minimum prices payable in that season. For ease of administration, deficiency payments are based on the assessed f.o.b. value of meat of a predominant weight grade in each class of meat. If in any week the assessed f.o.b. value of any of the eleven basic weight grades of meat falls below the floor price, a deficiency payment equal to the difference is paid; the deficiency payment on the weight grade used as the base is applied over all grades of that class of meat. The following are the minimum prices for the basic grades of export beef and veal in New Zealand:

Minimum prices for export meat

	pence per lb.				dollars per ton			
	1961-2	1962-3	1963-4	1964-5	1961-2	1962-3	1963-4	1964-5
Chilled beef: 680 lb. and under	14 3/4	14 3/4	14½	15	376.82	376.82	370.43	383.21
Quarter beef: Ox and heifer, G.A.Q., Ox, 680 lb. and under	13	13	14	14½	332.11	332.11	357.66	370.43
Quarter beef: Cow, G.A.Q. 600 lb. and under	10	10	11	11	255.47	255.47	281.02	281.02
Boneless beef: Cow, ox and heifer	12	12	14	14	306.56	306.56	357.66	357.66
Boneless beef: Bull	12	12	14	14	306.56	306.56	357.66	357.66
Veal (sides or quarters): under 220 lb.	11	11	11	11 1/4	281.02	281.02	281.02	287.40

The New Zealand Meat Producers Board does not itself market meat; this is done by private companies. Imports are not subject to licensing but only to a most-favoured-nation tariff of 40 per cent.

Sweden

There are no guaranteed prices for beef and veal in Sweden. The price support system, initiated in 1959, provides for the free fluctuation of domestic prices in accordance with the market situation, but within pre-determined limits. These limits are set from 10-15 per cent on either side of certain "middle prices", which are fixed at a level calculated to provide farmers with the desired level of income. The gap between middle prices and world prices is bridged by import levies and, when actual prices on the home market move outside the pre-determined limits, the amount of the levies is adjusted in the appropriate direction.

To protect producers against cost increases, two additional safeguards were initiated in 1959. The first of these is known as the "3 per cent rule" and depends for its application on the relationship between an index of world agricultural prices and an index of costs of production (other than labour costs) in Swedish agriculture. When the difference between these two indices exceeds 3 per cent for three successive months, the levies are automatically revised. The amount of the revision is such as to modify an index of prices paid to producers over the three months in question by one half of the above-mentioned difference (that is, by a minimum of 1.5 per cent). The second new provision initiated in 1959, the "income rule", was designed to link gross incomes of farmers with holdings of 10-20 hectares with industrial wage rates by the adjustment of import levies. When variations in the cost level lead, under either of these measures, to a change in the levies exceeding 3 per cent of the middle price of the product concerned, the middle prices themselves are changed by the same amount as the levies, and the price limits are re-established at a new level. The following are the price limits and import levies for beef and veal in Sweden.

Price limits and import levies

	öre per kg.				dollars per ton			
	1 Aug. 1963		1 Aug.1964		1 Aug. 1963		1 Aug. 1964	
	Price limits	Levies	Price limits	Levies	Price limits	Levies	Price limits	Levies
Whole and half carcasses:								
Fresh, chilled or frozen:								
of cattle:	483-615	226	524-666	211	993.6-1,188.8	436.9	1,012.9-1,287.4	407.9
of calves:	551-744	230	586-792	205	1,065.1-1,438.2	444.6	1,132.7-1,530.9	396.3

The levy on imported live cattle on 1 August 1964 was 118 öre per kg. ($228), and that on calves 136 öre ($263). In addition to these levies, there is a system of compensatory payments which are equal to the domestic slaughtering or marketing fees on the same or similar produce, or its derivatives. The rates of whole and half carcass meat on 1 August 1964 were 8 per cent of the import value for cattle and 14 per cent of the import value for calves.

There are no quantitative import restrictions. The government price support policy is administered through the Swedish Meat Trades Association. This body, acting under the supervision of the State Agricultural Marketing Board, operates a compensation fund, into which are paid the levies and compensatory fees on imports of livestock and meat, part of the import levies on feedstuffs, and fees charged on the slaughtering of animals. No budgeting contribution is involved. The fund is used to cover the costs of market regulation activities and to meet losses on exports.

Switzerland

Swiss authorities, with the aim of stabilizing prices, fix target prices for beef and veal around which, within given limits, seasonal fluctuations can take place. A global quota system is applied according to the needs of the market. If prices fall below the permitted margin, importers are required to co-operate within the framework of the provisions. There are no production subsidies. Tariffs amount to 1.6 per cent on cattle for slaughter and 3.6 per cent on meat.

Exports of breeding cattle, mainly from the mountain regions, are subsidized. These subsidies are financed out of duties on imported fodder cereals, supplemented if necessary by the Budget. Apart from these subsidies, the Government pays the transport charges from the exporter's domicile to the Swiss frontier for any category of animal entitled to a subsidy. In 1964, these transport charges totalled Sw. Frs. 525,470, i.e. Sw. Frs. 47 ($10.88), for each animal exported. The Government also grants subsidies in order to promote sales of cattle on the domestic market and to reduce the surpluses which lead to the implementation of export subsidies.

United Kingdom

The United Kingdom tariffs of beef and veal are 20 per cent in the case of boned or boneless meat; as regards other beef and veal the duty is 3/4d. per pound for chilled meat and 2/3d. per pound for fresh or frozen meat. Imports under the British Preferential System are admitted free of duty.

There are no quotas or other restrictions on imports but the Government has been seeking the co-operation of overseas suppliers in co-ordinating and phasing of supplies to the United Kingdom market.

B Piments (capsicum or pim
genre "capsicum" ou "pim

Internal support measures consist of deficiency payments i.e. for each type of fatstock producers are paid the difference between a guaranteed price (determined each year under the Agriculture Acts, 1947 and 1957) and the average market price. Producers receive a deficiency payment on fat cattle which have been sold and which have been certified as eligible under the Fatstock Guarantee Scheme. Eligibility is based on certain standards of weight and conformation. The guarantee is varied according to a seasonal scale of standard prices. Payments for cattle are calculated weekly and are, in broad terms, the difference between the average market price and the standard price for that week, but these payments are reduced when the market price is low and increased when it is high.

The guaranteed prices for the years 1961-1965 for fat cattle (steers and heifers) are the following:

	Liveweight	
	Shs. per cwt.	$ per ton
1961/62	167	460.24
62/63	167	460.24
63/64	167	460.24
64/65	170	468.50

The total amounts of deficiency payments made under the Scheme for the financial years 1961-1965 are:

	Million £	Million $
1961/62	46.4	129.9
62/63	30.5	85.4
63/64*	40.8	114.2
64/65*	43.0	120.4

*Estimated

In addition to the deficiency payment scheme there are special production grants. The Hill Cattle Subsidy Scheme is designed to give special assistance to producers in hill areas. A subsidy payment of £12 ($33.60) is made on breeding cows and in-calf heifers kept on eligible hill land. The Calf Subsidy Scheme is intended to encourage retention for breeding of the right type of calf. For eligible steer calves the subsidy amounted to £9:5 ($25.90) in the years 1961-1963 and was raised to £9:15 ($27.30) in 1964. The subsidy on heifer calves in these years was £7:10 ($21.00). Total payments under these schemes in the years 1961-1965 were the following:

	Calf Subsidy		Hill Cattle Subsidy	
	Million £	Million $	Million £	Million $
1961/62	17.8	49.8	5.0	14.0
62/63	17.7	49.6	5.4	15.1
63/64*	18.9	52.9	5.5	15.4
64/65*	19.4	54.3	5.6	15.7

*Estimated

United States

There are no internal price support measures and no export aids for beef and veal in the United States. The Government is empowered, however, to remove excess production for the strengthening of production prices under Section 32 of the 1935 Agricultural Act (Public Law No. 320). The Government has also purchased meat for distribution to needy families and school lunch programmes in the United States, and small quantities of frozen beef have been included in Public Law No. 480 sales. There is a specific duty on imports of about 10 per cent.

In early 1964 the United States Government concluded agreements with Australia, New Zealand, Ireland and Mexico under the terms of which these countries agreed to limit certain of their meat exports to the United States.

Maximum Allowable Exports
(thousand metric tons)

	1964	1965	1966
Australia: beef, veal and mutton (in all forms except canned, cured or cooked meat and live animals)	246	255	264
New Zealand: beef and veal (in all forms except canned, cured and cooked meat and live animals)	105	109	113
Ireland: beef and veal (in all forms except canned, cured and cooked meat and live animals)	34.5	35.9	37.2
Mexico: beef	30.1	31.2	32.2

AGRICULTURAL PRODUCTS
Animals (except horses) and meat or prim
genre espèces" ou "prim

The quantities indicated for 1965 and 1966 are calculated at an annual growth rate of 3.7 per cent (the expected rate of increase in the total United States market for these meats) based on the agreed maximum 1964 exports. The purpose of the growth factor is to secure exporters a fair and reasonable share in the growth of the United States market. The agreements provide for triennial review of this factor and adjustment as appropriate, for each succeeding period. In order to terminate the arrangement, either government must give 180 days prior notice.

In August 1964 legislation was enacted which provides for the imposition of quotas on fresh, chilled and frozen beef, veal, mutton and goat meat if imports would otherwise exceed certain levels.

The permitted level of imports is computed by a formula which allows imports to grow proportionate to domestic production. Quotas, if imposed, would equal the 1959-63 average imports (specified as 725.4 million pounds (329,000 tons)) adjusted up or down by the same percentage as the estimated average annual domestic production during that year and the two preceding years is above or below average domestic production for the 1959-63 period. Only if the estimated imports during a calendar year in the absence of quota limits exceed the contingency quota for that year by at least 10 per cent would quotas be applied.

Uruguay

In Uruguay there are no direct subsidies or support measures for cattle raising. However, the Government encourages the use of more fertilizer for pasture improvement and better methods of eradicating animal disease, and provides technical and financial assistance for livestock improvement. There are export taxes on beef and veal. In mid-1962 the export tax was reduced from 5 per cent ad valorem to .01 per cent in order to increase meat exports.

Yugoslavia

In Yugoslavia there is a price guarantee system aimed at improving the quality of beef and cattle. It thus applies only to certain breeds and to production of baby beef and of fattening calves of selected breeds. The guaranteed prices are below market prices and aim at securing to the producer costs of production and a minimum profit. If market prices fall below the guaranteed prices, the Directorate of Food, a State body, is obliged to purchase at the guaranteed prices. Beef imports are subject to a 10 per cent tariff, a 3 per cent tax and a 2 per cent turnover tax. Beef imports destined for further processing are subject to a general licensing system, while those for consumption are subject to a global quota applied to all agricultural products. Exports are not subsidized, but certain enterprises are exempted from the accumulation tax.

ANNEX

List of Selected Background Material of Possible Interest to the Group on Meat

GATT

Subsidies: Notifications pursuant to Article XVI:1; L/1948 and Addenda
Notifications of changes in subsidy measures; L/2326 and Addenda

Consultations on agricultural policies:

EEC: Text of the EEC regulation on beef and veal; L/2245
Description of the common agricultural policy in respect of beef; COM.II/137
Report of Committee II; L/2389

US: Text of the Meat Import Law; COM.II/136
Report of Committee II; L/2384

FAO

The World Meat Economy No. 40 Commodity Bulletin Series

This is a comprehensive study which deals with recent trends and the present pattern of world meat markets and with national meat policies; it gives an analysis of some basic economic factors and interrelationships; on the basis of the FAO projections for 1970 an evaluation is made of possible developments in world meat markets during the sixties; statistics and graphs are included.

Commonwealth Economic Committee

Meat; an annual review of production, trade, consumption and prices relating to beef, live cattle and other meats.

CHANGEMENT DE PRODUCTION
B Piments (capsicum or pimenta genre "capsicum" ou "pim

GENERAL AGREEMENT ON TARIFFS AND TRADE

ACCORD GENERAL SUR LES TARIFS DOUANIERS ET LE COMMERCE

RESTRICTED

Spec(65)123
16 November 1965

Group on Meat
Groupe de la viande

STATISTICS ON MEAT/ STATISTIQUES CONCERNANT LA VIANDE

Table 1 - Production, net trade and estimated consumption of beef and veal, 1954 to 1964.
Tableau 1 - Production, commerce net et consommation estimée de viande de boeuf et de veau, 1954 à 1964.

Table 2 - Trade in cattle, 1954 to 1964.
Tableau 2 - Commerce du bétail, 1954 à 1964.

Table 3 - Imports of beef and veal (fresh, chilled and frozen) into the United States and the EEC by main countries of origin, 1958-1964.
Tableau 3 - Importations de viande de boeuf et de veau (fraîche, réfrigérée et congelée) aux Etats-Unis et dans la CEE par principaux pays de provenance, 1958-1964.

GA
SECRETARIAT REGISTRY
B Piments (capsicum or pim genre capsicum" ou "pim

Table 1 - Tableau 1

PRODUCTION[a], NET TRADE[b] AND ESTIMATED CONSUMPTION OF BEEF AND VEAL, 1954 TO 1964

PRODUCTION[a], COMMERCE NET[b] ET CONSOMMATION ESTIMEE DE VIANDE DE BOEUF ET DE VEAU, 1954 A 1964

(thousand tons - milliers de tonnes)

	1954	1955	1956	1957	1958	1959	1960	1961	1962	1963	1964
United Kingdom - Royaume-Uni											
Production	764	715	819	826	812	719	821	905	918	944	878
Net trade - Commerce net	+270	+351	+436	+449	+391	+355	+354	+288	+329	+361	+340
Consumption - Consommation	1034	1065	1252	1273	1213	1081	1165	1201	1259	1313	1188
EEC - CEE											
Production	2959	3013	2995	3077	3117	3272	3468	3792	4027	4091	(3825)
Net trade - Commerce net	-4	+12	+172	+156	+135	+126	+128	+45	+43	+219	+375
Consumption - Consommation	2941	3010	3156	3230	3247	3391	3588	3829	4068	4309	(4200)
of which - dont:											
Belgium - Belgique											
Production	175	184	173	172	195	201	201	197	208	258	230
Net trade - Commerce net	+2	-	+8	+10	-	-1	+5	+12	+15	+9	(+20)
Consumption[c] - Consommation[c]	177	184	181	182	195	200	206	209	223	267	(250)
France											
Production	1342	1354	1328	1314	1265	1332	1455	1605	1666	1639	(1600)
Net trade - Commerce net	-44	-51	+1	+ 22	+18	-2	-36	-92	-145	-83	+3
Consumption[c] - Consommation[c]	1298	1303	1329	1336	1283	1330	1419	1513	1521	1556	(1603)
Germany, F.R. - Allemagne, R.F.											
Production	843	849	857	936	979	997	1044	1091	1169	1217	(1165)
Net trade - Commerce net	+1	+12	+89	+47	+7	+39	+45	+73	+93	+79	+107
Consumption[c] - Consommation[c]	844	861	946	983	986	1036	1089	1164	1262	1296	(1272)
Italy - Italie											
Production	410	418	435	442	464	523	525	659	704	653	(575)
Net trade - Commerce net	+26	+46	+68	+93	+120	+100	+137	+54	+95	+258	+284
Consumption[c] - Consommation[c]	436	464	503	535	584	623	662	713	799	911	(859)
Netherlands - Pays-Bas											
Production	189	208	202	213	214	219	243	240	280	324	(255)
Net trade - Commerce net	+11	+5	+6	-16	-10	-10	-23	-2	-15	-44	-39
Consumption - Consommation	(186)	198	197	194	199	202	212	230	263	279	..
United States - Etats-Unis											
Production	6627	6870	7300	7134	6584	6617	7182	7412	7398	7869	8815
Net trade - Commerce net	+2	+4	-17	+25	+159	+234	+182	+253	+387	+443	+305
Consumption - Consommation	6501	6733	7118	7131	6775	6891	7354	7663	7947	8382	..
Canada											
Production	549	561	600	653	610	578	631	647	643	697	768
Net trade - Commerce net	-2	+4	+1	-13	-14	+4	+4	-1	+7	+7	-7
Consumption - Consommation	546	552	588	631	584	574	623	633	638	740	..
Sweden - Suède											
Production	125	147	124	119	132	140	129	130	156	166	..
Net trade - Commerce net	+14	+3	+1	+1	+12	+6	+7	+17	-	-15	-3
Consumption[cc] - Consommation[c]	139	150	125	120	144	146	136	147	156	151	..
Poland - Pologne											
Production	201	224	253	250	309	336	305	340	395	437	(456)
Net trade - Commerce net	+1	-	-	-	+3	+16	+1	-18	-30	-4	-4
Consumption[c] - Consommation[c]	202	224	253	250	312	352	306	322	365	433	(452)
Yugoslavia - Yougoslavie											
Production	90	114	123	138	132	129	156	182	226	208	(200)
Net trade - Commerce net	-5	-9	-13	-10	-10	-8	-16	-30	-64	-69	-63
Consumption[c] - Consommation[c]	85	105	110	128	122	121	140	152	162	139	(137)
Ireland - Irlande											
Production	94	72	70	80	78	86	100	129	112	116	..
Net trade - Commerce net	-44	-17	-16	-27	-27	-35	-48	-76	-60	-62	-54
Consumption - Consommation	39	42	43	44	42	41	42	43	45	48	..
Denmark - Danemark											
Production	(134)	124	134	161	151	146	153	141	177	180	(150)
Net trade - Commerce net	-56	-42	-46	-83	-72	-60	-71	-50	-77	-95	-70
Consumption - Consommation	(72)	76	83	74	74	81	79	83	95	..	..
Argentina - Argentine											
Production	1815	2147	2475	2459	2541	1944	1883	2145	2379	2453	..
Net trade - Commerce net	-108	-194	-361	-365	-432	-371	-282	-275	-393	-537	(-391)
Consumption - Consommation	1583	1732	1873	1873	1894	1427	1498	1749	1833	1685	..
Uruguay											
Production	271	259	272	278	215	218	263	..	..	..	..
Net trade - Commerce net	-45	-5	-27	-32	-19	-22	-52	-43	-55	-65	-122
Consumption - Consommation	144	158	235	233	..	..	..	..	..	..	..
Australia - Australie											
Production [d]	731	763	828	805	921	764	643	804	929	1001	(1022)
Net trade - Commerce net	-114	-149	-124	-162	-168	-228	-146	-164	-251	-275	-299
Consumption - Consommation	480	503	558	553	531	449	402	448	493	503	..
New Zealand - Nouvelle-Zélande											
Production[e]	202	229	265	271	273	238	240	240	286	298	292
Net trade - Commerce net	-60	-96	-119	-118	-118	-90	-100	-97	-118	-123	-128
Consumption - Consommation	103	103	109	114	117	104	105	106	119	128	124

[a] Production from slaughtered animals (carcass weight) - Production des animaux abattus (poids en carcasse).

[b] (+) = net imports, (-) = net exports of beef and veal fresh, chilled and frozen - (+) = importations nettes, (-) = exportations nettes de viande de boeuf et de veau fraîche, réfrigérée et congelée.

[c] Apparent consumption i.e. production plus net trade of beef and veal fresh, chilled and frozen - Consommation apparente, c'est-à-dire production plus commerce net de viande de boeuf et de veau fraîche, réfrigérée et congelée.

[d] Twelve months ending 30 June of following year - Douze mois finissant le 30 juin de l'année suivante.

[e] Twelve months ending 30 September of year stated - Douze mois finissant le 30 septembre de l'année indiquée.

Sources: Statistical Office of the European Communities, Statistique Agricole - Office Statistique des Communautés Européennes, Statistique Agricole;
Commonwealth Economic Committee, Meat and Intelligence Bulletin;
FAO, Production and Trade Yearbooks and national statistics - FAO, Annuaires de la Production et du Commerce et statistiques nationales.

TRADE IN CATTLE, 1954 TO 1964
COMMERCE DU DETAIL, 1954 A 1964

(thousand heads - milliers de têtes)

		1954	1955	1956	1957	1958	1959	1960	1961	1962	1963	1964
United Kingdom - Royaume-Uni	Imports - Importations	603	611	605	815	642	474	508	691	567	639	707
	Exports - Exportations	2	2	(86)	(207)	151	161	60	189	122	164	306
EEC[a] - CEE[a]	Imports - Importations	322	468	615	593	597	689	844	875	755	1190[b]	1118[b]
	Exports - Exportations	80	174	57	49	58	133	225	273	174	403[b]	356[b]
of which - dont:												
Germany, F.R. Allemagne, R.F.	Imports - Importations	216	318	364	295	383	448	473	449	375	366	324
Italy - Italie	Imports - Importations	81	132	103	168	136	197	342	353	295	751	575
Netherlands - Pays-Bas	Imports - Importations	10	8	55	64	43	35	21	50	47	31	117
	Exports - Exportations	25	47	30	28	29	32	53	142	69	78	48
France	Imports - Importations	2	2	79	53	25	5	4	11	31	36	19
	Exports - Exportations	53	122	23	17	15	88	163	123	90	197	156
Ireland - Irlande	Imports - Importations	1	1	13	113	94	75	45	159	102	140	148
	Exports - Exportations	617	619	675	831	653	488	542	722	575	663	794
Yugoslavia - Yougoslavie	Exports - Exportations	82	52	88	116	70	88	96	150	91	104	..
United States - Etats-Unis	Imports - Importations	83	314	159	728	1152	709	663	1043	1250	851	547
	Exports - Exportations	21	35	37	44	26	51	32	24	19	23	62
Canada	Exports - Exportations	89	68	57	388	670	343	273	503	492	279	223
Denmark - Danemark	Exports - Exportations	205	314	284	231	321	349	353	371	294	340	267
Argentina - Argentine	Exports - Exportations	38	41	134	120	70	89	152	171	250	292	(180)

Note: The carcass weight equivalent of the animals traded is available for the EEC countries only and is shown below :
L'estimation du poids en carcasse des animaux mentionnés n'est disponible que pour les pays de la Communauté et est indiquée ci-dessous:

(thousand tons - milliers de tonnes)

		1954	1955	1956	1957	1958	1959	1960	1961	1962	1963
Total EEC Ensemble de la CEE	Imports - Importations	75	113	153	150	146	166	187	187	168	262
	Exports - Exportations	19	43	14	11	13	25	37	35	24	55
	Net imports Importations nettes	56	70	139	139	133	141	150	152	144	207
of which - dont:											
France Germany, F.R. Allemagne, R.F.	Net imports - Import.nettes	-18	-36	13	7	-	-18	-30	-21	-10	-22
Italy - Italie	Net imports - Import.nettes	56	79	86	78	92	107	107	110	90	87
Netherlands Pays-Bas	Net imports - Import.nettes	13	27	20	36	30	44	69	56	57	154
	Net imports - Import.nettes	3	-1	19	17	13	10	4	5	8	4

[a] Including EEC intra-trade - Y compris le commerce intra-communautaire.
[b] Of which Germany, F.R. and Belgium: 45 and 63 thousand heads in 1963, 126 and 26 thousand heads in 1964 respectively.
Dont la R.F. d'Allemagne et la Belgique: 45 et 63 milliers de têtes en 1963, 126 et 26 milliers de têtes en 1964 respectivement.

Sources: Commonwealth Economic Committee, Meat and Intelligence Bulletin;
Statistical Office of the European Communities, Statistique Agricole - Office Statistique des Communautés Européennes, Statistique Agricole.

JAPAN
AGRICULTURAL PRODUCTS
Import or transfer of "primary products"

IMPORTS OF BEEF AND VEAL (FRESH, CHILLED AND FROZEN) INTO THE UNITED STATES, THE UNITED KINGDOM AND THE EEC BY MAIN COUNTRIES OF ORIGIN, 1958-1964
IMPORTATIONS DE VIANDE DE BOEUF ET DE VEAU (FRAICHE, REFRIGEREE ET CONGELEE) AUX ETATS-UNIS, AU ROYAUME-UNI ET DANS LA CEE PAR PRINCIPAUX PAYS DE PROVENANCE, 1958-1964

(thousand tons - milliers de tonnes)

Origin - Provenance / Importing country - Pays importateur	UNITED STATES - ETATS-UNIS						
	1958	1959	1960	1961	1962	1963	1964
Argentina - Argentine	1	-	-	-	-	-	-
Brazil - Brésil	-	-	-	-	-	1	-
Uruguay	-	-	-	-	-	-	-
Mexico - Mexique	28	22	18	24	27	33	22
Australia - Australie	8	101	65	101	204	234	171
New Zealand - Nouvelle-Zélande	83	73	60	68	96	107	76
Denmark - Danemark	-	-	-	-	-	-	-
Ireland - Irlande	13	19	24	31	31	33	9
EEC - CEE	-	-	-	-	-	-	-
of which - dont: France	-	-	-	-	-	-	-
Netherlands - Pays-Bas	-	-	-	-	-	-	-
Yugoslavia - Yougoslavie	-	-	-	-	-	-	-
Other countries - Autres pays	30	23	21	34	34	40[a]	43[a]
Total Imports - Importations totales	163	238	188	258	392	448	321

Origin - Provenance / Importing country - Pays importateur	UNITED KINGDOM - ROYAUME-UNI						
	1958	1959	1960	1961	1962	1963	1964
Argentina - Argentine	260	215	207	155	184	240	152
Brazil - Brésil	-	-	-	-	1	3	1
Uruguay	2	7	33	21	17	41	32
Mexico - Mexique	-	-	-	-	-	-	-
Australia - Australie	127	111	66	33	36	19	86
New Zealand - Nouvelle-Zélande	14	7	20	12	8	2	27
Denmark - Danemark	..	..	..	0.5	-	-	0.5
Ireland - Irlande	3	7	15	34	22	18	20
EEC - CEE	2	3	3	3	4	3	4
of which - dont: France	-	-	-	-	-	-	1
Netherlands - Pays-Bas	2	3	3	3	4	3	3
Yugoslavia - Yougoslavie	-	-	1	15	40	15	14
Other countries - Autres pays	1[b]	12[b]	13[b]	19[b]	21[b]	23[b]	13[b]
Total Imports - Importations totales	409	362	358	293	333	364	350

Origin - Provenance / Importing country - Pays importateur	EEC - CEE						
	1958	1959	1960	1961	1962	1963	1964
Argentina - Argentine	62	65	52	67	88	130	193
Brazil - Brésil	20	16	3	3	5	5	10
Uruguay	4	9	15	11	9	3	29
Mexico - Mexique	-	-	-	-	-	-	-
Australia - Australie	1	-	1	-	-	-	11
New Zealand - Nouvelle-Zélande	4	1	4	-	0.6	-	4
Denmark - Danemark	47	41	53	9	29	66	51
Ireland - Irlande	1	1	4	4	2	6	21
EEC - CEE							
of which - dont: France							
Netherlands - Pays-Bas							
Yugoslavia - Yougoslavie	3	2	9	3	9	37	37
Other countries - Autres pays	11	11	16	5	7	34[c]	43[c]
Total Imports - Importations totales	153	146	157	102	150	281	399

Origin - Provenance / Importing country - Pays importateur	GERMANY, F.R. - ALLEMAGNE, R.F.						
	1958	1959	1960	1961	1962	1963	1964
Argentina - Argentine	20	29	9	14	21	21	41
Brazil - Brésil	-	1	1	1	-	-	1
Uruguay	-	7	9	9	7	1	10
Mexico - Mexique	-	-	-	-	-	-	-
Australia - Australie	-	-	1	-	-	-	-
New Zealand - Nouvelle-Zélande	-	1	4	-	-	-	-
Denmark - Danemark	1	-	4	6	12	11	1
Ireland - Irlande	1	-	3	4	2	2	7
EEC - CEE	0.5	12	34	51	60	54	55
of which - dont: France	-	11	30	41	50	49	53
Netherlands - Pays-Bas	0.5	1	3	10	10	5	2
Yugoslavia - Yougoslavie	-	-	-	-	2	-	-
Other countries - Autres pays	-	3	-	-	1	1	2
Total Imports - Importations totales	23	53	65	85	106	91	118

Origin - Provenance / Importing country - Pays importateur	ITALY - ITALIE						
	1958	1959	1960	1961	1962	1963	1964
Argentina - Argentine	29	27	33	35	45	84	99
Brazil - Brésil	17	13	2	1	3	3	2
Uruguay	2	1	3	1	2	2	11
Mexico - Mexique	-	-	-	-	-	-	-
Australia - Australie	-	-	-	-	-	-	5
New Zealand - Nouvelle-Zélande	4	-	-	-	-	-	2
Denmark - Danemark	44	38	48	3	17	55	49
Ireland - Irlande	-	-	1	-	-	3	8
EEC - CEE	16	14	29	9	16	44	42
of which - dont: France	-	3	9	8	3	3	3
Netherlands - Pays-Bas	9	7	15	-	10	32	36
Yugoslavia - Yougoslavie	3	2	9	2	6	37	34
Other countries - Autres pays	5	5	12	3	6	30[c]	32[c]
Total Imports - Importations totales	120	100	137	54	95	258	284

Note: Data for the EEC exclude intra-EEC trade; on the other hand imports of Germany and Italy include shipments from the other EEC countries.
Les données concernant l'ensemble de la Communauté ne comprennent pas les échanges intra-communautaires; par contre ces échanges sont inclus dans les chiffres relatifs à la République fédérale d'Allemagne et à l'Italie.

[a] Of which: 30 thousand tons from other Latin American Republics - Dont 30 milliers de tonnes en provenance des autres Républiques d'Amérique latine.

[b] Of which - dont:

	1958	1959	1960	1961	1962	1963	1964
Rhodesia - Rhodésie	1	6	5	7	8	8	5
South Africa - Afrique du Sud	-	3	7	9	7	10	8

[c] Of which: 18 and 16 thousand tons from Eastern Europe for 1963 and 1964 respectively. - Dont 18 et 16 milliers de tonnes en provenance de l'Europe de l'Est pour 1963 et 1964 respectivement.

Sources: Commonwealth Economic Committee, Meat and Intelligence Bulletin;
Statistical Office of the European Communities: Analytical tables - Office Statistique des Communautés Européennes: Tableaux Analytiques;
UN, Commodity Trade Statistics, and national trade returns - et statistiques nationales du commerce extérieur.

GENERAL AGREEMENT ON TARIFFS AND TRADE

RESTRICTED

Spec(65)128
26 November 1965

Group on Meat

PROGRAMME OF WORK
(Revised Draft)

The Group on Meat, noting the views of most members that the collection of information would be useful in the evaluation of offers when made, unanimously invites members of the Group and other countries significant in world production of and/or trade in meat to assemble [and examine] the following information. This information should relate to fat cattle, beef and veal. Where information relates to past performance it should cover, if possible, a period of five years. This information should be rendered in United States cents and kilogrammes or United States dollars and metric tons.

I. Existing beef policies:

(i) Support prices: guaranteed prices, guide prices, intervention prices (indicating differences according to type of meat or cattle).

(ii) Market prices for cattle; yearly average.

(iii) Prices fixed for support purchases by the State.

(iv) Total producer's return per kilogramme live weight, including assistance and subsidies directly related to this return.

(v) Inventory and costs of the main aids and subsidies of every type which may directly influence production and returns to producers.

(vi) Total value of production.

(vii) Analysis of measures at the frontier: customs duties; specific and ad valorem charges on imports; variable lines; quotas and quantitative import restrictions; other restrictions to imports or to the sale of imported goods; fees paid on account of administrative import formalities.

II. Incidence on meat production of policies on cereals and dairy products.

(i) Estimated volumes of cereals used for intensive fattening of cattle with a breakdown showing type of cereal and origin.

(ii) Prices of fattening cereals paid by the cattle producer.

(iii) Evolution of ratio between cereal prices and fat cattle prices.

(iv) Total producers' returns for milk, including all types of assistance and direct and indirect subsidies.

(v) Evolution of ratio between meat prices of fat cattle, liveweight basis, and milk prices.

(vi) Estimated quantity and value of beef and veal production from dairy herds.

(vii) Comparative evolution of dairy cattle herd and fat beef herd in relation to total cattle herd.

III. Internal prices

Information on the levels of internal prices for beef and veal per kilogramme of carcass, in the most representative markets or cities:

(i) wholesale prices,

(ii) retail prices or consumer prices,

(iii) comparative analysis of marketing costs,

(iv) charges on wholesale and retail sales of meat, at the national, provincial and municipal level, as recorded at the most representative commercial centres.

IV. International prices

(i) Information on the levels of international prices prevailing during the last five seasons in the various markets for the defined qualities and modes of presentation of meats: f.o.b., c.i.f., free-at-frontier prices etc.

(ii) data on the conditions of price formation in international markets; comments on the economic or legal conditions of the operation of prices applicable to international trade;

(iii) concrete data on export subsidies and export aids; global values and quantities, and values per unit;

(iv) information on stocking capacities in the various countries.

V. Bilateral agreements affecting imports.

VI. Trends in production, imports, exports and consumption of beef over the five-year period 1961-65 and estimates until 1970, on a standardized statistical basis.

VII. Trends in total per caput consumption of all types of meat for the same periods mentioned above, in relation to available income, retail price and percentage of consumer expenditure devoted to meat.

VIII. Sanitary or veterinary regulations affecting the level of beef imports.

IX. Import policies for live cattle.

GENERAL AGREEMENT ON TARIFFS AND TRADE

CONFIDENTIAL

INT(66)471/Rev.1
17 June 1966

Group on Meat

DRAFT WORKING DOCUMENT

Revision

B	Piments (capsicum or pimenta genre "capsicum" ou "pimenta"	CH/ex0904	JA

		SWITZERLAND	NEW ZEALAND Year ending September	JAPAN US$/kg. per liveweight Year ending 31 March	UNITED KINGDOM Year ending 31 March	NORWAY Year ending 30 June
Support price	1965	75-79* (1964)	- (Minimum price supported by industry's reserves)	-	46.85 (Guaranteed price for fat cattle (steers and heifers) which conform to certain standards of weight and conformation.)	98.4*
Market price	1965	79* (1964)	25.0-20.0*	57.75 (1964)	46.85	100.0* (Bulls, grade I)
Producers return	1965	79* (1964) *(Heifers and steers Ia)	25.0-20.0* *(Ox and cow beef respectively)	57.75 (1964)	49.05 (Total return to the producer from the market and from the deficiency payments in respect of all fat cattle certified under the Fatstock Guarantee Scheme)	100.0* *(deadweight)
Wholesale price	1965	155 (1964) (deadweight)	48.0* *(Average yearly) (deadweight)	96.4 (1964) (Carcass weight - good quality steers Tokyo)	81.99 (Average calender year) (carcass weight)	..
Tariff		Live animals: $2.32 per head Meat: $2.32/100 kgs.	(i) Meat, fresh, chilled or frozen: 40% (ii) Canned meat/meat preparations: 45-55%	(i) Beef and processed meat: 25% (ii) Meat extracts: 30%	Live animals: Free Beef and veal and offals: 0-20%	Various specific duties up to 48% ad valorem equivalent (1964).
Non-tariff measures		QR	(ii) QR	(i) QR	-	QR

		AUSTRALIA	ARGENTINA	SWEDEN	UNITED STATES	DENMARK
		Year ending 30 June		US$ per kg. liveweight		
Support price	1965	-	-	106.4-118.2 (deadweight) (target price)	-	76.0 (home market price - deadweight)
Market price	1965	28.1 (Melbourne 1st and 2nd quality ox beef liveweight)	30.6 (steers)		52.38 (choice steers Chicago)	49.4-40.8 (heifers and cows 1st grade)
Producer's return	1965	28.1	30.6	117.2-134.2-159.8 (cows, steers, heifers, calves respectively) (carcass weight)	52.38 (choice steers Chicago)	49.3-40.7 (heifers and cows)
Wholesale price	1965	50.0 (1st quality ox beef Brisbane - carcass weight)	54.41 (carcass weight)	122.8-195.6(Oct.1965) (beef and veal respectively) (carcass weight)	94.07 (choice steers Chicago) (carcass weight)	86.3 (bullocks and heifers and young cows, 1st grade, carcass weight)
Tariff		Beef and veal, fresh chilled, from 6 US¢/kg. + 10 per cent Live animals: free	Beef, fresh, chilled or frozen: 220 per cent	Import levy	Cattle: 1.5-2.5¢/lb. Beef and veal, fresh chilled, frozen: 3¢/lb.	Live cattle, beef, veal: free
Non-tariff measures		-	-	-	-	QR

		CANADA	YUGOSLAVIA	POLAND	AUSTRIA	EEC	BELGIUM	FRANCE	GERMANY	ITALY	LUXEMBURG	NETHERLANDS
		Year ending 31 March					US¢ per kilogramme liveweight				*year ending 31 March	
Support price	1965	36.5 (live steers delivered Toronto)	48.0* (only applies to 30% of production)	( )	34.6-53.8 (target price cows, bulls and oxen)		60.00*	58.13*	60.00*	60.00*	60.00*	58.70*
Market price	1965	37.7 (average all sales public stockyards) 46.4 (good steers delivered Toronto)	52.0*	( )	60.2 (bulls)		65.00	62.25	67.50	68.75	63.50	60.00
Producer's return	1965	37.7 (average all sales public stockyards)	52.0* *(bull calves/heifers)	( )	60.2 (bulls)		65.00	62.25	67.50	68.75	63.50	60.00
Wholesale price	1965	83.3 (1964) (wholesale dressed beef prices Toronto) (good quality steers)	..	( )	108.1 (calves dead-weight)		123.1 (dead-weight)	114.5- (dead-weight)	131.0 (dead-weight)	129.3 (dead-weight)	121.C (dead-weight)	111.5 (dead-weight)
Tariff		Live cattle: free - 1 1/2¢/lb. Beef and veal, fresh or frozen: 3¢/lb. Beef, canned: 30%	Live animals: free - 3% Meat and edible offals: 6-7%	-	Import levies		Live animals: 6-16% Meat, fresh, chilled, or frozen: 20% Import levy					
Non-tariff measures		-	QR	State-trading	QR		-					

GENERAL AGREEMENT ON TARIFFS AND TRADE

S E C R E T

No. 3

Group on Meat

October 1966

PROPOSALS FOR A GENERAL ARRANGEMENT

The attached tabular sheets contain the texts of comparable provisions in the proposals for a general arrangement on meat, submitted by members of the Group. These texts are presented under the following headings.

Products Included

Agricultural Policies

Access

International Prices

Assurance of Supply

Other Matters

Proposals dealing with institutional arrangement, administration, etc. have not been included in this tabular presentation and it would be advisable to read it in conjunction with the proposals themselves.

ARGENTINA	AUSTRALIA	DENMARK	EUROPEAN ECONOMIC COMMUNITY	NORWAY	UNITED KINGDOM	UNITED STATES
			Products Included			
	The proposals relate to meats of cattle, it being understood that live cattle and other types of meat could be brought under consideration as appropriate and necessary. (Ex paragraph 1) It is envisaged that separate arrangements would need to apply to frozen and chilled meats. (Paragraph 9)	ex 01.02 Live animals of the bovine species, except breeding animals ex 02.01 Meat and edible meat offals of the animals of the bovine species, fresh, chilled or frozen ex 02.06 Meat and edible meat offals of the animals of the bovine species, salted, in brine, dried or smoked ex 15.02 Unrendered fats of bovine cattle; tallow (including "premier jus") produced from those fats, except for technical purposes	... it has appeared opportune to limit the provisions of the Arrangement, at the outset, to frozen meat of animals of the bovine species (ex 02.01 A II). Provisions of the General Arrangement could subsequently be extended to products other than frozen bovine meat. Furthermore, specific provisions could be adopted within the framework of the Arrangement between the parties directly concerned in respect of products such as live bovine animals, trade in which are subject to geographical limitations. (Paragraph 3) Specific measures must be provided within the framework of the General Arrangement in order to establish or maintain normal conditions of competition in international trade in processed products of bovine meat. (Paragraph 13)	The offer relates to "cattle meat, mutton and pork".	... deals primarily with beef and veal (BN 02.01 (A)(1)). (Ex paragraph 1) See also paragraph 5 under "Access" below.	Beef, veal, mutton (fresh, frozen, chilled). (Paragraph 2)
			Agricultural Policies			
Concerning production, all countries regardless of their situation in the market should undertake to apply reasonable internal policies which take into account not only their own market but also probable trends in overall supply and demand from the qualitative and quantitative points of view, as well as in prices. These countries might bear in mind the structure of the different markets and should aim at stabilizing equitable levels for both producers and exporters in such a way as to ensure reasonable earnings for efficient producers without discouraging consumption. (Ex paragraph 4)	Acceptance of the trading arrangements as proposed by Australia might require some modification of the protective policies and techniques currently employed by certain major importing countries but generally they would not involve a radical change of current practices and in fact could be accomodated within existing protective régimes. However, it is the Australian view that national support policies in some net importing countries would need to be reoriented particularly in any periods when reserve quotas (see paragraph 10 under "Access") were in operation. (Paragraph 12)	Each contracting party undertakes to reduce or consolidate the amount of support given to national producers or the individual elements of such support (tariffs, import levies, direct subsidies, etc.). Contracting parties maintaining high levels of support must reduce that level or the individual elements of such support. In other cases, a particular level of support or of the individual elements of support may be consolidated. Commitments undertaken by contracting parties in respect of the level of support or its individual elements must aim at approximating national producer prices to a level which will give efficient producers a reasonable remuneration. The commitments of contracting parties should be formulated in a way which takes account of the form in which support is given to national producers. The commitments may be taken up for periodical review having regard especially to increases in costs involved in the production of beef and veal (including live cattle). (Paragraph 1)	The parties to the Arrangement shall enter into commitments with respect to the aggregate support granted to production of animals yielding meat of qualities comparable to or competitive with frozen bovine meat. The binding of the support margin shall constitute an identical commitment basis for all the parties to the Arrangement. (Paragraph 14) So far as the EEC is concerned, it shall bind the support margin resulting from the difference between, on the one hand, the international reference price, and on the other hand, the "price derived from the Community guide price" fixed for qualities of Community meat comparable to or competitive with those of frozen meat imported into the Community. (Paragraph 15) Taking into account the diversity of agricultural policies and support systems, and the various stages of economic development of the parties to the Arrangement, the commitment with respect to the aggregate effect of the system of protection and support shall allow for some differentiation in obligations, pursuant to the provisions hereunder: - developed countries with a State-trading system shall enter into commitments appropriate to their economies and equivalent to the commitments of market-economy countries; - less-developed countries shall, in principle, enter into commitments equivalent to those of developed countries. (Paragraph 16)	The Norwegian Government will continue to take measures in order to limit and adapt production to the needs of the domestic market. (Paragraph 1)	In the context of its domestic support policies the United Kingdom will aim to relate the expansion of home production to the expected growth of demand in the market. In the event of the world supply position changing so that some form of import regulation became necessary, the United Kingdom would adopt domestic support policies consistent with the implementation of any agreement arrived at as a result of the consultations envisaged ... (see under "Access" below). (Paragraph 4)	

ARGENTINA	AUSTRALIA	DENMARK	EUROPEAN ECONOMIC COMMUNITY	NORWAY	UNITED KINGDOM	UNITED STATES
			The binding of the support margin shall leave each party ... free to select the instruments to be used within the framework of its support system. ... each party shall notify the Council of the list of instruments which are related to the support margin. (Paragraph 17) Furthermore, since the support margin may hinge directly on the use of certain instruments, the parties ... may request that commitments be undertaken with respect to one or more specific instruments. (Paragraph 18) Subject to compensation being offered, each party to the Arrangement may make an upward revision in the bound support margin if such action proves necessary for reasons of overriding interest. (Paragraph 20)			

Access

INT(66)577

ARGENTINA	AUSTRALIA	DENMARK	EUROPEAN ECONOMIC COMMUNITY	NORWAY	UNITED KINGDOM	UNITED STATES
[illegible]	[illegible]				The United Kingdom operates no quantitative restrictions on the entry of the products dealt with in this paper, except for imports from the Eastern Area; and these are not at present operative for beef and veal. The United Kingdom Government does not at present foresee the need to restrict the quantity of beef and veal coming onto its market. The United Kingdom is moreover prepared to give an assurance about the level at which restrictions might be applied if changes in the position in the United Kingdom market appeared to make this necessary. In such circumstances, the United Kingdom would be ready: (i) to consult with the exporting countries concerned on the character and level of any restrictions to be applied and of any assurances of supply to be given; and (ii) to provide the opportunity of continued access for imports at a level which had regard to the actual level achieved during a recent representative period prior to the changes in question and to the likely trend of demand. (Paragraph 3)	The United States [would be] prepared within the [course] of the Kennedy Round, [and] subject to the conditions set forth in paragraph [1] /of its offers/, to undertake commitments respecting the meats concerned to permit imports to share in the United States' market and to share in any growth in that market, as follows: the annual aggregate quantity which will be admitted will not be less than the average quantity imported during the period 1959-63 adjusted by the same percentage that domestic production of these articles has increased or decreased in comparison with the average annual production during the base period 1959-63. (Paragraph [3])

ARGENTINA	AUSTRALIA	DENMARK	EUROPEAN ECONOMIC COMMUNITY	NORWAY	UNITED KINGDOM	UNITED ST
					Some items to be covered by the Meat Group are the subject of contractual preferences. The United Kingdom does not exclude offers on these items subject to the agreement of the countries concerned, and would on this basis be prepared to consider making tariff concessions including reducing its tariffs on [certain listed products]. (Paragraph 5)	

International Prices

See paragraphs 8, 10 and 11 under "Access".

The international reference price for frozen bovine meat is at the same time an instrument for determining the support granted to producers and an instrument for stabilizing prices in international trade. (Paragraph 5)

The international reference price, conceived as being a minimum price applicable in international trade, shall be fixed f.o.b. in units of account per metric ton, for a specified type and quality of meat considered as being representative in the world market. (Paragraph 6)

The geographical situation of the various exporting countries may justify a differentiation in the prices ruling in international trade. (Paragraph 8)

The level of the international reference price for frozen meat shall be negotiated between all the parties to the General Arrangement.

Acceptable conditions of international competition and procedures which make it possible to correct the effects of national policies should make possible sufficiently stable international prices which will help to balance world supply and demand in the long run. Other elements could act to moderate fluctuations due to seasonal changes in the international market. (Paragraph 6)

In so doing, the parties shall take account of the need to fix an equitable and remunerative price level satisfactory to their producers as well as their consumers and such as will facilitate a better market equilibrium. (Paragraph 9)

Efforts should be made to reach agreement on international or regional minimum prices for beef and veal. In the Danish view, such minimum prices should be fixed at a level which will ensure a reasonable remuneration to efficient producers. The contracting parties should undertake to refrain from exporting or importing beef and veal at prices below the international minimum price. Observance of this obligation should be ensured by means of levies on exports or, failing this, levies on imports. (Paragraph 2(b))

Exporting countries shall take all appropriate measures within their power to ensure, as far as they are concerned, that the international reference price is observed. To this end, these countries shall apply the specific instruments of their agricultural and commercial policies in an appropriate manner. (Paragraph 10)

Where supplies are offered at prices below the level of the international reference price, importing countries which are parties to the Arrangement shall levy a compensatory amount. Countries which have observed the international reference price shall be exempt from the compensatory levy requirement. In practice, each importing country shall be responsible for determining the method of levying the compensatory amount. (Paragraph 11)

In the administration of the compensatory amount, importing countries shall take account of the measures provided by exporting countries which are parties to the General Arrangement to ensure observance of the international reference price. (Paragraph 12)

[illegible]	[illegible]	[illegible]	[illegible] ECONOMIC COMMUNITY	NORWAY	UNITED KINGDOM	UNITED STATES
... [illegible] ... [illegible] (See paragraph [illegible]).		[illegible]				
[illegible]						
[illegible] supply to [illegible] ... [illegible] in view of [illegible] changing [illegible] frozen meat, [illegible] supplies. (Paragraph [illegible])			[illegible] (Paragraph [illegible])		See paragraph 3(i) under "Access".	
[illegible]						
[illegible] Argentina [illegible] any [illegible] that [illegible] possible [illegible] (P[illegible])		[illegible]	[illegible]			
[illegible] particular [illegible] effects [illegible]			[illegible] Arrangement shall [illegible] production and international trade. (Paragraph 11)	The Norwegian Government will encourage a bigger consumption of meat and pork on the domestic market. (Paragraph 2)		

GENERAL AGREEMENT ON TARIFFS AND TRADE

S E C R E T

INT(66)576
26 October 1966

Group on Meat

PROPOSALS FOR A GENERAL ARRANGEMENT

At the meeting of the Group on 25 October, nine members, which had not yet submitted formal written proposals for a general arrangement, commented verbally on the attitudes of their governments towards a general arrangement and on the possible content of such an arrangement. These verbal comments are summarized in the attached tabular sheets. General observations appear under the heading "General" whilst comments on particular aspects of a possible arrangement are listed under the following headings:

Products Included

Agricultural Policies

Access

International Prices

Assurance of Supply

Other Matters

AUSTRIA	CANADA	IRELAND	JAPAN	NEW ZEALAND	POLAND	SWEDEN	SWITZERLAND	YUGOSLAVIA
				General				
	The existing proposals contain adequate material for the formulation of a draft arrangement. Canada cannot contribute importantly at this stage but it will participate in the negotiation of the final text of the arrangement.			Meat presents fairly significant difficulties when it comes to formulating a general arrangement. New Zealand has genuine doubts as to whether a comprehensive approach is necessary for the beef trade. A general arrangement does not need to go beyond (a) improved access through more liberal quantitative arrangements, (b) tariff or levy reductions where this would be the appropriate form of concession and (c) the establishment of a set of principles to govern trade in beef.		Sweden attaches great importance to the conclusion of a world arrangement on meat, and is prepared to contribute to the objectives of stabilization of prices and expansion of trade.	Switzerland is of the view that access is the key to fulfilling the objectives of the Ministerial Resolution. Switzerland is ready to participate in the formulation of a general arrangement.	
				Products Included				
ex 01.02 Live animals of the bovine species except breeding animals. ex 02.01 Meat and edible meat offals of the animals of the bovine species, fresh, chilled or frozen. ex 02.06 Meat and edible meat offals of the animals of the bovine species, salted in brine, dried or smoked.		Fresh, frozen and chilled beef.	Beef, veal and mutton, whether fresh, frozen or chilled.		A general arrangement should, above all, cover frozen bovine meat. Regional arrangements (in particular one for Europe) should cover live cattle, and fresh and chilled beef and veal.			Live bovine animals, fresh, chilled, frozen, dried and smoked bovine meat. It might prove necessary for an arrangement to contain different provisions for different types of meat.
				Agricultural Policies				
Austria is prepared to maintain its present agricultural policies in respect of the slaughter cattle production, which is characterized by price stabilization measures and the absence of direct aids aiming to encourage production.		Apart from arrangements for the United Kingdom market, the meat trade in Ireland is completely free and prices are determined by conditions on the world market.	Japan has no internal support system for meat. Protection is only at the frontier.	In response to the reasonably satisfactory market demand and on the basis of projections of the likely supply/demand position in the future, New Zealand has plans for a further expansion in beef production.	Poland is ready to continue its present policy aiming to maintain a certain balance between dairy and beef production and thereby to avoid unduly strong increases in the production of either. It is also ready to continue its policy of encouraging beef consumption. Poland is also ready to undertake commitments that are appropriate to its economic system and equivalent to those taken by other participants to the arrangement.	Sweden's agricultural policy is presently being worked out. Sweden wishes to continue participating in the elaboration of a general arrangement on meat, and to do so more fully, in line with the progress made in establishing its own agricultural policy.	By undertaking commitments on access, participating countries will thereby implicitly assume obligations as regards local production to ensure that access is not impaired. Switzerland cannot undertake any definite commitments in relation to its agricultural policy.	All countries should undertake not to encourage inefficient production by high internal support measures or frontier restrictions.

AUSTRIA	CANADA	IRELAND	JAPAN	NEW ZEALAND	POLAND	SWEDEN	SWITZERLAND	YUGOSLAVIA
				Access				
Austria is prepared to undertake commitments affording opportunities of access to its market depending on the facilities given for its own exports of cattle and beef.		Ireland is very interested in the question of improved access to the EEC market, particularly in respect of live cattle and chilled beef. As regards the United States market, Ireland is interested in any measures which would have the effect of providing improved opportunity for her trade in frozen beef.	Japan has offered to expand present quotas on imports of beef and veal. It intends to set up annual quotas, incorporating an annual increase. For ovine meat, tariff is the only barrier; Japan is offering to reduce it from 10 per cent to 7 1/2 per cent.	The solution for trade in beef lies in improving access where this is restricted quantitatively. In other cases a lower level of protection through tariff reduction or adjustments to internal prices, plus possibly some extension of quantitative commitments would go a long way towards meeting the problem.	Access is of the utmost importance. Conditions must be created to allow steady access and to permit exporters to share at least in part in any increase in demand in the importing countries. Poland does not believe that in principle quantitative rules are necessary, in view of the general tendency for demand to outpace supply. Should it however be decided that the arrangement is to be based *inter alia* on a quantitative system applied in a non-discriminatory manner, Poland would be ready to participate in such a system. Poland envisages the possibility of increasing its imports of frozen bovine meat; it therefore considers its abstention from discussions on the level of an international reference price (see below) as a positive offer.		Switzerland offers the assurance to import a minimum global percentage of its total requirements in conditions to be determined. Access provisions could be expressed in ways other than direct quantitative undertakings but these are not of course as precise.	Exporters should be assured of a normal access to the markets of importing countries and of a share in any increase in consumption. In cases of over supply, importers should give priority to imports from exporting countries participating in the Arrangement.
				International Prices				
In order to avoid excessive price fluctuations, Austria is in favour of negotiating minimum prices on an international or regional basis. Austria is prepared to ensure the observance of such prices by appropriate administrative and legal measures.		Ireland has reservations as regards international reference prices particularly in connexion with the possibility of establishing representative scales of prices for the different qualities and grades of meat and especially about the feasibility of maintaining such prices and ensuring their observance.	It may not be easy to establish an international price or price range. One difficulty is the variability of prices among different import markets. If a price range is agreed upon, the levels should be reasonable, and should be accompanied by assurance of supply by exporters within the agreed price range.	Trade in beef falls roughly into four main classes: live cattle, fresh and chilled beef, frozen carcass beef and boned-out frozen beef for processing. Within each of these categories there are a number of grades and qualities and the prices of these do vary from day to day and not in any even pattern of movement. There could be some danger that some of the approaches suggested could result in distortion of trade patterns.	Poland shares the view that an international reference price for frozen meat can contribute towards a stabilization of world prices. It possesses all the means necessary for observing a price discipline arising out of such a system. In view of the difference between the Polish price system and that of other countries, Poland is ready to abstain from participation in the work aimed at fixing such a price. Consumption should not be hampered by a price level that is too high. If an international reference price is agreed upon for frozen meat there will be need for at least some conversion coefficient with respect to other types of meat.		Fixed international price levels might have advantages but this is a matter that should be considered initially by the exporting countries. The Swiss authorities are not empowered legally to impose compensatory levies to ensure the observance of minimum prices.	Price levels established should be stable, equitable and remunerative. A fixed minimum price, on an international or regional basis, could be one of the elements ensuring a more stable world market for meat.

AUSTRIA	YUGOSLAVIA
Austria would be in a position to ensure a reasonable continuity of supply to import markets.	In cases of short supply, the international arrangement could make provision *inter alia*, for priority to be given by exporting participants to deliveries to importing participan
Owing to the major interest of Austria in this field it is essential that live cattle be treated in the prospective international arrangement on the same footing as bovine meat and veal. Regional arrangements will probably be necessary in this respect.	t a nt e to ns, s f ts that re r n c based

AUSTRIA	CANADA	IRELAND	JAPAN	NEW ZEALAND	POLAND	SWEDEN	SWITZERLAND	YUGOSLAVIA
				Assurance of Supply				
Austria would be in a position to ensure a reasonable continuity of supply to import markets.			See under "International Prices".	See under "Agricultural Policies".	The solution to this important problem should be found jointly by the main importing and exporting countries. Poland is ready to possibly participate in any system agreed upon but is not willing to take any initiative with respect to this question.			In cases of short supply, the international arrangement could make provision, inter alia, for priority to be given by exporting participants to deliveries to importing participants.
				Other Matters				
Owing to the major interest of Austria in this field it is essential that live cattle be treated in the prospective international arrangement on the same footing as bovine meat and veal. Regional arrangements will probably be necessary in this respect.								It has to be recognized that a general world-wide arrangement would give rise to certain problems. One of these is the position of non-participants and another is that it would be more appropriate for arrangements in respect of live animals to be based on a regional rather than an international approach.

INT(66)577

GENERAL AGREEMENT ON TARIFFS AND TRADE

SECRET
INT(66)577
2 November 1966

Group on Meat

PROPOSALS FOR A GENERAL ARRANGEMENT

The present document supplements and modifies the information given in the documents of 18 October 1966 (unnumbered) and 26 October (INT(66)576).

Texts pertaining to "Objectives", derived from the proposals made, or, in the case of Japan, supplied by the delegation, are presented in tabular form.

Additional or modified texts are given in respect of the European Economic Community and Poland.

TROPICAL PRODUCTS
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ARGENTINA	AUSTRALIA	DENMARK	EUROPEAN ECONOMIC COMMUNITY	JAPAN	NORWAY	UNITED KINGDOM	UNITED STATES	URUGUAY
			OBJECTIVES					
This General Arrangement and the special agreements concluded pursuant to it between the principal importing and exporting countries shall contribute to: 1. a significant development and expansion of world trade in bovine meat; 2. a better balance between aggregate supply and demand for this commodity in international markets; 3. guarantee international prices at levels remunerative to producers and equitable to consumers, as well as the stabilization of those prices in dynamic terms; 4. the creation of acceptable conditions of access to world markets, compatible with the commitments to be entered into by the parties to the General Arrangement; 5. the stabilization of national support prices at levels that do not imply any discouragement of consumption or incentive to marginal production; 6. the equitable participation of efficient producers in consumption increases; 7. the forecasting of probable trends in international supply and demand, so as to assure exporting countries of adequate disposal levels and importing countries of adequate supplies at the appropriate time; 8. to eliminate distortions in prices and supplies caused by factors of a seasonal character. 9. in general, to establish the fullest possible co-operation between the participating countries with respect to international problems relating to beef and veal, with a view to ensuring the efficient operation of the General Arrangement.	Consistent with the general intention of the Kennedy Round trade negotiations the ultimate objective of the meat negotiations should be to obtain a significant reduction in existing barriers to trade in beef and veal and to ensure "acceptable conditions of access to world markets in furtherance of a significant development and expansion of world trade".		1. The GATT Ministerial Resolution of May 1963 constitutes a starting point for the implementation of a General Arrangement in the bovine meat sector. 2. The General Arrangement on bovine meat should make it possible: - to achieve and maintain a better balance between aggregate supply and demand; - to attain stable world prices at levels remunerative for producers and equitable for consumers; - to create acceptable conditions of access to world markets in furtherance of a significant development and expansion of world trade. The General Arrangement on bovine meat constitutes an appropriate framework for commitments with respect to elements of internal policy likely to affect equilibrium of the marketfor bovine meat as well as with respect to the introduction of new measures concerning international trade.	The negotiations shall provide for acceptable conditions of access to world markets for meat.			The central aim of the United States is to create acceptable conditions of access for meat exporters.	... The Uruguayan delegation reaffirms statements made at the Ministerial Meeting in May 1963.

European Economic Community

The following changes are made in the document of 18 October 1966 (unnumbered):

Under "Access", insert:

> For EEC, creation of acceptable conditions of access must result from combination of appropriate measures, such as:
>
> (i) binding of support margin in relation to elements of internal agricultural policy, including producer's return and all support and protective measures instituted at the frontier;
>
> (ii) concept and mechanisms of reference price in relation to export and import policies applied.

Under "Assurance of Supply": delete text, which is transferred to "Other Matters".

Under "Other Matters": Delete paragraph beginning "In paragraph 3 ...".

"Other Matters" now reads:

> In order to permit a better adjustment of supply to demand in the world market, the parties to the Arrangement shall consult together each year and shall examine the situation and prospects for production and international trade. (Paragraph 21)
>
> In the event of special difficulties in the world market, the Council of the Arrangement may recommend the introduction of specific measures to stabilize supplies in the more or less long term, in particular by concerted restraint in marketing. (Paragraph 22)

TROPICAL PRODUCTS
Text to be modified as a result of changes in paragraph 3

Poland

Under "Other Matters" in document INT(66)576, insert:

The Polish delegation considers that provisions on live cattle and fresh meat in particular should be different from those on frozen meat, for the following reasons:

- there is no world trade in live cattle and fresh meat, such exchanges being limited to specific regions;
- prices and access to markets for live cattle and fresh meat are closely dependent on internal situation in a few import markets situated in vicinity of exporting country concerned;
- as a result prices of live cattle and fresh meat are subject to short-term fluctuations and seasonal variations which are not apparent to the same extent in formation of prices of frozen bovine meat;
- demand for the two types of meat is different in character. In case of fresh meat, demand is for direct consumption; as regards frozen meat, demand by processing industry possibly replaces demand for direct consumption;
- having regard to this situation, it would not seem that one could provide the same stabilizing mechanisms for live cattle and fresh meat as for frozen meat. By definition, fresh meat cannot be held in stock, for it would change in character. For the same reason, it cannot be sold outside the region;
- since prices of live cattle and fresh meat progress at a different rate from prices of frozen bovine meat, it would seem that value coefficient for fresh meat in relation to frozen meat can be considered solely as an indicator of a general character. It goes without saying that it should be possible to establish minimum prices for fresh meat according to region, taking into account the situation of markets constituting a specific region.

S E C R E T

23 November 1966

DRAFT

ELEMENTS TO BE CONSIDERED FOR INCLUSION IN A GENERAL ARRANGEMENT ON MEAT

PART I - GENERAL

Article 1 - Objectives

Article 2 - Coverage

PART II - RIGHTS AND OBLIGATIONS

Article 3 - International reference price

1. The international reference prices for frozen and chilled beef meats are respectively the c.i.f. prices laid down in Annex A for each country of destination indicated in that annex, established for the types of meat specified in that annex, on the basis of the arithmetic average of the c.i.f. prices prevailing in that country of destination during a representative period preceding the entry into effect of this Arrangement.

2. The Committee on price equivalents provided for under Article of the Arrangement shall determine, where appropriate, the reference prices for the countries or types of frozen or chilled bovine meat not listed in Annex A.

Article 4 - Stabilization of the market

1. (a) Participating countries listed in Annex B shall accord unrestricted entry into their market for any offering of meat by another participating country at a c.i.f. price at or above the relevant reference price as defined in Article 3 above. The provisions of this paragraph shall not apply to customs duties in force in terms of the tariff of the participating country, nor to normal customs clearance charges.

(b) When the c.i.f. prices in its market of imports of a type of meat, originating in any country having a substantial interest in exports of meat to that market, are below the relevant reference price for a period of twenty-eight days, each participating country listed in Annex B shall be entitled to introduce a quantitative limitation on imports of that type of meat from all sources, in accordance with the quota provisions laid down in Annex B or in accordance with the provisions of sub-paragraph (c) of this Article.

(c) In the circumstances referred to in sub-paragraph (b) above, the participating importing countries concerned shall consult with the exporting countries concerned on the character and level of any restrictions to be applied and of any assurances of supply to be given. The participating importing countries shall provide opportunity for continued access for imports at a level which has regard to the actual level achieved during a recent representative period prior to the changes in question and to the likely trend of demand.

./.

(d) Participating countries listed in Annex B undertake, with respect to the instruments of their national agricultural or commercial policy, identified for each of them in that annex, such specific commitments as are laid down in that annex.

2. (a) Participating countries listed in Annex C to this Arrangement undertake:

(i) not to increase their support so as to raise the return of the meat producers beyond the level existing on the date of this Arrangement as specified in Annex C or, alternatively,

(ii) not to increase the margin of difference between, on the one hand, the national support or target price for meat and, on the other, the international reference price, established for the participating country concerned in accordance with the provisions of Article 3, made comparable to the national support or target price.

(b) In addition to the commitments undertaken under sub-paragraph (a) of this paragraph, participating countries listed in Annex C undertake such specific commitments as are laid down in that annex.

3. (a) The participating countries listed in Annex D to this Arrangement undertake, with respect to the instruments of their national agricultural or commercial policy, identified for each of them in that annex, commitments specified in that annex equivalent in their effect to the commitments undertaken under paragraphs 1 and 2 above.

(b) In particular, when the instruments identified under sub-paragraph (a) above, include quota restrictions on meat imports, such quotas shall be fixed in agreement with the participating exporting countries having a substantial interest in exports of meat to the market of the participating country concerned. Furthermore, such quotas shall be revised annually so as to permit imports to share in any growth in the market.

Article 5 - Assurances of supply

Exporting countries shall undertake to adopt the internal measures that they consider necessary and appropriate in order to ensure continuous supplies meeting the requirements of world demand, and shall likewise undertake to regulate consignments so as not to cause any disruption in import markets. They shall periodically notify to the organ of the Council responsible for supervising the operation of the Arrangement the exportable volumes for each annual period and the probable phasing of shipments during the year.

SECRET

23 Novembre 1966

PROJET

ELEMENTS A PRENDRE EN CONSIDERATION EN VUE DE LEUR INCLUSION DANS UN ARRANGEMENT GENERAL SUR LA VIANDE

PREMIERE PARTIE - DISPOSITIONS GENERALES

Article 1 - Objet

Article 2 - Champ d'application

DEUXIEME PARTIE - DROITS ET OBLIGATIONS

Article 3 - Prix de référence international

1. Les prix de référence internationaux des viandes bovines ~~congelées et réfrigérées~~ sont, pour les pays de destination nommés à l'annexe A, les prix c.a.f. correspondants indiqués à ladite annexe, établis pour les types de viande spécifiés dans cette annexe sur la base de la moyenne arithmétique des prix c.a.f. pratiqués dans le pays de destination pendant une période représentative antérieure à l'entrée en vigueur du présent Arrangement.

2. a) Le Comité des équivalences de prix prévu à l'article de l'Arrangement détermine, s'il y a lieu, les prix de référence pour les pays ou les types de viandes bovines ~~congelées ou réfrigérées~~ non mentionnés à l'annexe A.

Article 4 - Stabilisation du marché

1. a) Les pays participants énumérés à l'annexe B s'accordent mutuellement le libre accès à leur marché pour toute offre de viande faite à un prix c.a.f. égal ou supérieur au prix de référence correspondant défini à l'article 3 ci-dessus. Les dispositions du présent paragraphe ne s'appliquent pas aux droits de douane en vigueur d'après le tarif du pays participant ni aux impositions douanières normales auxquelles donne lieu le dédouanement.

b) Si, à l'importation sur le marché d'un pays participant nommé à l'annexe B les prix c.a.f. d'un type de viande originaire d'un pays quelconque ayant un intérêt substantiel dans les exportations de viande vers ce marché restent inférieurs au prix de référence pendant une période de 28 jours, ledit pays participant a le droit de limiter en quantité les importations de toutes provenances de ce type de viande conformément aux dispositions contingentaires de l'annexe B ou aux dispositions de l'alinéa c) du présent article.

c) Dans les circonstances visées à l'alinéa b) ci-dessus, les pays participants importateurs concernés engagent avec les pays exportateurs concernés des consultations sur la nature et le niveau des restrictions à appliquer et sur les garanties d'approvisionnement à donner. Les pays participants importateurs maintiennent l'accès pour les importations à un niveau en rapport à la fois avec le niveau effectivement atteint pendant une période représentative récente antérieure aux changements en question, et avec la tendance probable de la demande.

d) Les pays participants nommés à l'annexe B s'engagent à prendre, pour ce qui est des instruments de politique agricole ou commerciale identifiés pour chacun d'entre eux à cette annexe, les engagements spécifiques énoncés dans ladite annexe.

2. a) Les pays participants nommés à l'annexe C du présent Arrangement s'engagent:

i) soit à ne pas accroître le soutien d'une manière qui aurait pour effet de porter la rémunération des producteurs de viande à un niveau supérieur au niveau existant à la date du présent Arrangement, tel qu'il est spécifié à l'annexe C,

ii) soit à ne pas accroître la marge existant entre d'une part le prix de soutien ou le prix indicatif national de la viande et d'autre part le prix de référence international établi pour le pays participant concerné conformément aux dispositions de l'article 3, rendu comparable au prix de soutien ou au prix indicatif national.

b) En plus des engagements souscrits conformément à l'alinéa a) du présent paragraphe, les pays participants nommés à l'annexe C souscrivent les engagements spécifiques énoncés dans ladite annexe.

3. a) Les pays participants nommés à l'annexe D du présent Arrangement souscrivent, pour ce qui est des instruments de leur politique agricole ou commerciale nationale identifiés pour chacun d'entre eux dans cette annexe, des engagements, spécifiés dans ladite annexe, d'un effet équivalant à celui des engagements souscrits en vertu des paragraphes 1 et 2 ci-dessus.

b) En particulier, quand les instruments identifiés en vertu de l'alinéa a) ci-dessus comprennent des restrictions contingentaires à l'importation de la viande, les contingents en question sont fixés avec l'accord des pays participants exportateurs pour qui les exportations de viande vers le marché du pays participant concerné présentent un intérêt substantiel. En outre, ces contingents sont revisés chaque année de façon à permettre aux importations de participer aux avantages de la croissance du marché.

Article 5 - Garanties d'approvisionnement

Les pays exportateurs s'engagent à adopter les mesures intérieures qu'ils estiment nécessaires et appropriées pour assurer un approvisionnement continu répondant aux besoins de la demande mondiale; ils s'engagent pareillement à régulariser leurs envois de façon à ne causer aucune désorganisation des marchés d'importation. Ils notifient périodiquement à l'organe du Conseil chargé de surveiller l'application de l'Arrangement les quantités exportables pour chaque période annuelle et l'échelonnement probable des livraisons au cours de l'année.

GENERAL AGREEMENT ON TARIFFS AND TRADE

No. 41

SECRET

INT(66)627
19 December 1966

GROUP ON MEAT

Note by the Director-General

From informal consultations with some of the participants in the Group on Meat, I have arrived at the conclusion that at this juncture it is not possible to draw up a draft outline for a multilateral arrangement in which the countries belonging to the Group could concur.

I thought that it might be useful, however, to submit to the members of the Group some elements that might, in a first stage, facilitate further negotiations.

In the light of the progress of these negotiations, the Group would then need to meet to decide how an acceptable multilateral arrangement could be negotiated.

Elements that Might Facilitate further Negotiations

International reference prices

1. The international reference prices for bovine meats are respectively the c.i.f. prices laid down in Annex A for each country of destination indicated in that annex, established for the types of meat specified in that annex, on the basis of the arithmetic average of the c.i.f. prices prevailing in that country of destination during a representative period preceding the entry into effect of this Arrangement.

2. (a) The Committee on Price Equivalents provided for under Article ... of the Arrangement shall determine, where appropriate, the reference prices for the countries or types of bovine meats not listed in Annex A.

(b) Each participating country may, if necessary, consult the Committee on Price Equivalents in order to examine whether the prices prevailing for other qualities and types of meats effectively correspond to the international reference prices.

3. Participating importing and exporting countries undertake to apply the specific instruments of their agricultural and commercial policy in such a way as to ensure that the international prices are stabilized, in particular, participating countries undertake, when exporting, to regulate consignments in such a way as to stabilize international prices.

4. If a participating country considers that the situation of prices on a particular market so requires, it may request the Council to consult with participating countries in order to remedy the situation.

Stabilization of the market

1. (a) The participating countries listed in Annex B shall accord unrestricted entry into their market for any offering of meat by another participating country at a c.i.f. price at or above the relevant reference price as defined in

Article 3 above. The provisions of this paragraph shall not apply to customs duties in force in terms of the tariff of the participating country, nor to normal customs clearance charges.

(b) When the c.i.f. prices in its market of imports of a type of meat, originating in any country having a substantial interest in exports of meat to that market, are below the relevant reference price for a period of twenty-eight days, each participating country listed in Annex B shall be entitled to introduce a limitation on imports of that type of meat from all sources, in accordance with the provisions laid down in Annex B or in accordance with the provisions of sub-paragraph (c) of this Article.

(c) In the circumstances referred to in sub-paragraph (b) above, the participating importing countries concerned shall consult with the exporting countries concerned on the character and level of any restrictions to be applied and of any assurances of supply to be given. The participating importing countries shall provide opportunity for continued access for imports at a level which has regard to the actual level achieved during a recent representative period prior to the changes in question and to the likely trend of demand.

2. The participating countries listed in Annex C to this Arrangement shall accord unrestricted entry into their market for any offering of meat by another participating country at a c.i.f. price at or above the relevant reference price as defined in Article 3 above, as long as the price of its internal market is at or above (- %) of the support or target price. The provisions of this paragraph shall not apply to customs duties in force in terms of the tariff of the participating country, nor to normal customs clearance charges.

3. The participating countries listed in Annex D to this Arrangement shall provide opportunity for continued access for imports at a level, specified in that Annex, which has regard to the actual level achieved during a recent representative period and which shall be revised annually in such a way as to permit imports to share in any growth in the market.

Internal price and support policies

1. The participating countries listed in Annexes B, C and D to this Arrangement undertake in respect of their national policy on bovine meats commitments as described in paragraph 2 hereafter, relating to the total effect of the various elements of support of protection, and/or commitments as described in paragraph 3 hereafter, relating to all relevant elements of support or protection.

TROPICAL PRODUCTS
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2. Participating countries listed in Annex C to this Arrangement undertake either not to increase their support so as to raise the return of the meat producers beyond the level existing on the date of this Arrangement as specified in Annex C, or alternatively to bind the support such as results from the difference between the international reference price and the return of the meat producers in the country concerned.

3. The participating countries listed in Annexes B, C and D to this Arrangement undertake, with respect to the instruments of their national agricultural or commercial policy, identified for each of them in those annexes, such specific commitments as are laid down in those annexes.

Assurance of supply

Exporting countries undertake to adopt the internal measures that they consider necessary and appropriate in order to ensure continuous supplies meeting the requirements of world demand.

ACCORD GENERAL SUR LES TARIFS DOUANIERS
ET LE COMMERCE

No. 27

SECRET

INT(66)627
19 décembre 1966

GROUPE DE LA VIANDE

Note du Directeur général

Au cours des consultations officieuses que j'ai été amené à tenir avec nombre de participants au Groupe de la viande, je suis arrivé à la conclusion qu'il n'était pas actuellement possible d'établir un projet d'esquisse d'accord multilatéral, susceptible de recueillir l'approbation des pays membres du Groupe.

Toutefois il m'a paru utile de soumettre dès maintenant aux membres du Groupe quelques éléments qui pourraient, dans un premier stade, faciliter leurs négociations ultérieures.

Il appartiendra au Groupe ultérieurement, au vu des progrès enregistrés dans ces négociations, de se réunir pour décider de quelle manière un arrangement multilatéral acceptable pourrait être négocié.

UNOFFICIAL PRODUCTS
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Eléments qui pourraient faciliter les négociations ultérieures

Prix de référence internationaux

1. Les prix de référence internationaux des viandes bovines sont, pour les pays de destination nommés à l'annexe A, les prix c.a.f. correspondants indiqués à ladite annexe, établis pour les types de viande spécifiés dans cette annexe sur la base de la moyenne arithmétique des prix c.a.f. pratiqués dans le pays de destination pendant une période représentative antérieure à l'entrée en vigueur du présent Arrangement.

2. a) Le Comité des équivalences de prix prévu à l'article ... de l'Arrangement détermine, s'il y a lieu, les prix de référence pour les pays ou les types de viandes bovines non mentionnés à l'annexe A.

b) En cas de besoin, le Comité des équivalences de prix peut être consulté par une quelconque partie à l'Arrangement pour examiner si les prix pratiqués pour d'autres qualités et présentations de viandes correspondent effectivement aux prix internationaux de référence.

3. Les pays participants importateurs et exportateurs s'engagent à faire des instruments spécifiques de leur politique agricole et commerciale un usage propre à assurer que les prix internationaux soient stabilisés. En particulier, les pays participants qui exportent s'engagent à régulariser leurs envois de façon à stabiliser les prix internationaux.

4. Si un pays participant considère que la situation des prix sur un marché particulier l'exige, il peut demander au Conseil d'engager des consultations avec les pays participants en vue de remédier à cette situation.

Stabilisation du marché

1. a) Les pays participants énumérés à l'annexe B accordent le libre accès à leur marché pour toute offre de viande faite par un pays participant à un prix c.a.f. égal ou supérieur au prix de référence correspondant défini à l'article 3 ci-dessus. Les dispositions du présent paragraphe ne s'appliquent pas aux droits de douane en vigueur d'après le tarif du pays participant ni aux impositions douanières normales auxquelles donne lieu le dédouanement.

b) Si, à l'importation sur le marché d'un pays participant nommé à l'annexe B les prix c.a.f. d'un type de viande originaire d'un pays quelconque ayant un intérêt substantiel dans les exportations de viande vers ce marché restent inférieurs au prix de référence pendant une période de 28 jours, ledit pays participant a le droit de limiter les importations de toutes provenances de ce type de viande conformément aux dispositions de l'annexe B ou aux dispositions de l'alinéa c) du présent article.

c) Dans les circonstances visées à l'alinéa b) ci-dessus, les pays participants importateurs concernés procèdent avec les pays exportateurs concernés à des consultations sur la nature et le niveau des restrictions à appliquer et sur les garanties d'approvisionnement à donner. Les pays participants importateurs maintiennent une possibilité d'accès au marché pour les importations à un niveau en rapport à la fois avec le niveau effectivement atteint pendant une période représentative récente, antérieure aux changements en question, et avec la tendance probable de la demande.

2. Les pays participants nommés à l'annexe C du présent Arrangement accordent le libre accès à leur marché pour toute offre de viande faite par un pays participant à un prix c.a.f. égal ou supérieur au prix de référence correspondant défini à l'article 3 ci-dessus, tant que le prix sur le marché intérieur est égal ou supérieur à (-%) du prix de soutien ou du prix indicatif. Les dispositions du présent paragraphe ne s'appliquent pas aux droits de douane en vigueur d'après le tarif du pays participant ni aux impositions douanières normales auxquelles donne lieu le dédouanement.

3. Les pays participants nommés à l'annexe D du présent Arrangement maintiennent une possibilité d'accès au marché pour les importations à un niveau, précisé dans ladite annexe, en rapport avec le niveau effectivement atteint pendant une période représentative récente et qui sera revisé chaque année de façon à permettre aux importateurs de participer aux avantages de la croissance du marché.

TROPICAL PRODUCTS IDN, SFM, UGA
B Piments (capsicum or pimenta)/Pimenta (du genre "capsicum" ou "pimenta")

Politiques internes de prix et de soutien

1. Les pays participants nommés aux annexes B, C et D du présent Arrangement souscrivent, en ce qui concerne leur politique nationale relative à la viande bovine, les engagements qui sont énoncés au paragraphe 2 ci-après au sujet de l'effet global des divers éléments de soutien ou de protection, et/ou les engagements énoncés au paragraphe 3 ci-après au sujet de tous les éléments pertinents de soutien ou de protection.

2. Les pays participants nommés à l'annexe C du présent Arrangement s'engagent soit à ne pas accroître le soutien d'une manière qui aurait pour effet de porter la rémunération des producteurs de viande à un niveau supérieur au niveau existant à la date du présent Arrangement tel qu'il est spécifié à l'annexe C, soit à consolider le soutien tel qu'il résulte de la différence entre le prix international de référence et la rémunération des producteurs de viande du pays considéré.

3. Les pays participants nommés aux annexes B, C et D du présent Arrangement souscrivent, pour ce qui est des instruments de politique agricole ou commerciale identifiés pour chacun d'entre eux dans ces annexes, les engagements spécifiques énoncés dans lesdites annexes.

Garanties d'approvisionnement

Les pays exportateurs s'engagent à adopter les mesures intérieures qu'ils estiment nécessaires et appropriées pour assurer un approvisionnement continu répondant aux besoins de la demande mondiale.