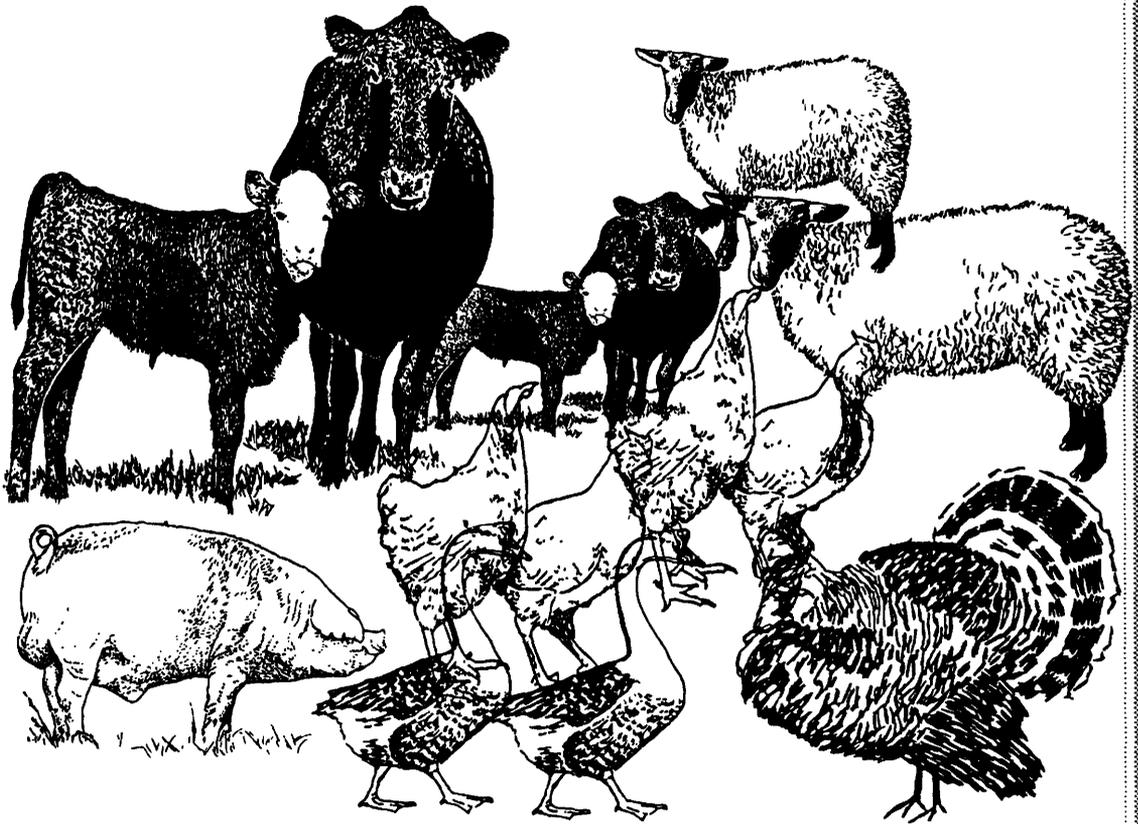


COMMISSION OF THE EUROPEAN COMMUNITIES  
DIRECTORATE-GENERAL FOR AGRICULTURE

# CAP WORKING NOTES 1993



**MEAT**

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I N T R O D U C T I O N

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The information in this document is arranged in three parts:

- the "analysis" part describes the market situation and the mechanisms of the market organization in the product;
- the "statistics" part gives most of the tables appearing for the product in the annual report on the agricultural situation in the Community;
- lastly, the "explanatory memorandum" of the Commission's annual agricultural price proposals provides an indispensable illustration of the Community policy.

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**DESCRIPTION OF THE MECHANISMS**  
**OF THE COMMON MARKET ORGANIZATION**  
**FOR BEEF/VEAL (\*)**

The common organization is governed by Regulation (EEC) No 805/68, as last amended by Regulation (EEC) No 1628/91.

It covers the following products:

- live animals: bovine animals of less than 300 kg and adult bovine animals, whether pure-bred breeding animals or not,
- meat: meat, fresh, chilled or frozen, other,
- processed products: other preparations and preserves of meat or offal, cooked or uncooked,
- offal.

The marketing year runs from the first Monday in April to the end of the previous day of the following year.

In 1991, expenditure on beef/veal accounted for 13,5% of total EAGGF Guarantee spending.

**1. ECONOMIC BACKGROUND**

The Community ranks second behind the United States in the production of beef/veal, which accounts for some 14% of the value of final production. In the years 1984 to 1987, the production of beef/veal held steady at about 8 million, mainly as a result of the slaughterings attendant on the application of the system of milk quotas. Production then declined by 5,5% in 1988 and 2,9% in 1989. 1990 saw a cyclical upturn in beef/veal production, and the slaughter of dairy cows in the former GDR increased supply by 4,4%. This increase continued in 1991, reaching 5,1%, partly as a result of substantial imports of calves from East European countries. With the turn in the production cycle in 1992 and following the decision to limit Community imports of calves drastically, a marked decline in production - of the order of 5% - is to be expected in 1992.

The economic situation, having improved somewhat from 1983 onwards, beef/veal consumption showed a rise of about 5% until 1988. After some stabilization in 1989, consumption of beef/veal fell by 4,9% in 1990 as a result of the BSE scare. A slight increase occurred in 1991 and is expected to continue in 1992.

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(\*) Translated from "Avant-projet de budget général des Communautés européennes pour l'exercice 1993".

The rate of self-sufficiency, which exceeded 100% up to 1988, was below 100% in 1989; in 1990 it rose again to 109,6% and 113,9% in 1991. With the slowdown in production, it is likely to be around 106% in 1992.

As regards trade, the EEC imported 500 000 t of beef/veal in 1990 and exported 816 000 t, giving a surplus of 316 000 t. As a result of strong demand, principally from East European countries, exports rose to 1 325 000 t in 1991. With imports totalling 535 000 t, the net export surplus in 1991 came to 790 000 t.

## **2. OPERATION OF THE MARKET**

### **2.1. Price arrangements**

Every year the Council fixes two categories of prices:

- (a) The guide price: The guide price is fixed for adult bovine animals in the light of the outlook for production and consumption, of the situation of the milk and milk products market and of past experience. It is the desired average price on the Community market for all quantities marketed during the marketing year. The guide price and the Community market price are used as a reference to determine the relevant import levies.
- (b) The intervention price: This is the price (ECU 343/100 kg carcass weight for R3 adult male bovine animals) which determines support for the market in beef/veal.

### **2.2. Specific market instruments**

#### **2.2.1. Import and export arrangements**

Imports are governed by very specific rules according to product. The principle is that a customs duty and a levy are charged related to the guide price and the market price. There are two exemptions:

- the scarcity clause, which restricts or abolishes customs duties and levies;
- the protective clause, which provides for restrictions on imports.

There are also special schemes in certain fields.

Community exports may attract a refund - which may be varied according to intended use/destination - offsetting the difference between world prices and Community prices.

### 2.2.2. Storage

Under the intervention system, intervention agencies can buy in categories and qualities of meat the market price of which fails to reach a certain percentage of the derived intervention price for these categories.

The Council decided that intervention would be opened, generally speaking, by reference to the following criteria:

- (a) the average market price in the Community for the quality or group of qualities concerned must be below 84% of the corresponding intervention price;
- (b) the average market price nationally for the quality or group of qualities concerned must be below 80% of the corresponding intervention price.

The buying-in price is determined by tendering procedure. Nonetheless, a buying-in scheme may be established as a safety net, relating to all tenders submitted, when the Community market price falls below 78% of the intervention price and when the market price falls below 75% of the intervention price in three Member States or regions of the Community representing at least 60% of Community production of young bovines or bullocks or below 72% of the market price in a single Member State or region.

Private storage aid permits more flexible intervention according to the quantities and qualities meeting market requirements and may be paid when the market price falls below a certain percentage of the guide price.

### 2.2.3. Premium system

#### (a) Premium for suckler cows

The aim of this premium is to ensure a reasonable income for stockfarmers. To claim the premium, each farmer must show that he delivers no milk or milk products. This measure was extended in 1990 to small milk producers (reference quantity 60 000 kg/year). The premium for 1990/91 is ECU 40/head, chargeable to the EAGGF Guarantee Section. The Member States may pay an additional premium, not exceeding ECU 25/cow, of which ECU 20 is chargeable to the EAGGF Guarantee Section when paid in Ireland, Northern Ireland and Greece. For 1991/92, exceptionally, the premium was raised to ECU 50, the amounts ECU 25 and ECU 20 above being replaced by ECU 35 and ECU 28 respectively.

(b) Special premium

This premium is fixed at ECU 40 per head and may be paid for male animals reared to adulthood, once during the life of the animal or at slaughter. It is paid for a maximum of 90 head per holding.

2.2.4. Community scale for the classification of carcasses of adult bovine animals

This Regulation, which was made generally applicable by Regulation (EEC) No 1186/90, standardizes the classification of carcasses in the Community. Market prices are recorded on the basis of carcass weight at the slaughterhouse and expressed according to the reference presentation established by the Regulation.

By Regulation (EEC) No 869/84 the Council decided that intervention measures for carcasses of adult bovine animals were to be applied on the basis of the Community scale from 9 April 1984. It has enabled a single buying-in price to be fixed for each quality of fresh or chilled meat eligible for intervention.

2.2.5. Proposals in connection with the reform of the common agricultural policy

With a view to the implementation of the CAP reform, the Commission has put proposals to the Council to:

- cut the intervention price by 15%, 10% corresponding to the fall in prices of inputs (proposals for cereals) and the other 5% being regarded as necessary to maintain the competitive position of beef;
- raise the special premium to ECU 180 per animal (in the form of three annual payments of ECU 60 each) and the suckler cow premium to ECU 75 per cow per year. Criteria regarding extensification would be introduced for the two premiums;
- introduce a special programme for the elimination of young male cattle from dairy herds, in order to prevent surpluses at the earliest possible stage;
- establish a programme for the promotion and marketing of quality beef. A programme of checks would also be introduced to ensure that no prohibited substances were being used in beef production.

**DESCRIPTION OF THE MECHANISMS**  
**OF THE COMMON MARKET ORGANIZATION**  
**FOR SHEEPMEAT AND GOATMEAT (\*)**

The market organization for sheepmeat and goatmeat is governed by Regulation (EEC) No 3013/89, as amended by Regulation (EEC) No 1741/91.

The products covered are the following:

- live animals: sheep and goats whether or not pure-bred,
- meat: fresh, chilled or frozen,
- processed products: meat and offal of sheep and goats, salted, dried or smoked, preserved, other,
- offal.

The marketing year runs from the first Monday in January to the end of the previous day of the following year.

Expenditure in this sector accounted in 1991 for 5,8% of total EAGGF Guarantee expenditure.

**1. ECONOMIC BACKGROUND**

The gross Community production of sheep and goatmeat in 1991 was 1 233 000 t (EUR 12), i.e. an increase of 3,4% on the 1990 figure. The long-term trend has been upward since 1970. Production is expected to rise by about 2,0% in 1991. The number of sheep is about 100 million (EUR 12). The Community is the world's second largest producer, the largest being the States comprising the former USSR.

In 1991 Community consumption was 1 430 000 t (EUR 12). The long-term trend is upward in all Member states at a slightly slower rate than the increase in production.

The degree of self-sufficiency is at present about 85% (EUR 12).

As regards trade, in 1991, the EEC imported 258 000 t of sheepmeat, in particular from New Zealand; its exports totalled 20 000 t (including, exceptionally, 13 000 t from the former GDR).

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(\*) Translated from "Avant-projet de budget général des Communautés européennes pour l'exercice 1993".

## 2. OPERATION OF THE MARKET IN SHEEPMEAT

### 2.1. Price arrangements

Every year the Council fixes the basic price for fresh or chilled sheep carcasses. It is the same for the entire Community.

The basic price is seasonally adjusted by the Council on a proposal from the Commission, to take account of seasonal variations on this market.

### 2.2. Specific market instruments

#### 2.2.1. Import and export arrangements

The arrangements for imports vary according to the product imported. For some products, i.e. offal, the Common Customs Tariff duties are chargeable.

For others, i.e. live animals other than pure-bred breeding animals, and meat, chilled or frozen, imports attract a levy. The levy matches the difference between the basic price, seasonally adjusted, and the Community free-at-frontier price established on the basis of the most representative purchasing possibilities, as regards quality and quantity, recorded during a period to be fixed, preceding the determination of the levy.

However, for products bound under GATT, i.e. fresh and frozen meat, the levies may not exceed the amount bound (20% ad valorem).

A special levy may be fixed for products originating in or coming from one or more non-member countries, if such exports are effected at abnormally low prices. In practice, however, under voluntary restraint arrangements concluded with the main non-member supplier countries, the import levies are currently suspended.

Exports of sheepmeat may, where necessary, attract a refund matching the difference between the prices of the products on the world market and those in the Community. It may be varied according to intended use/destination. Thus far, the instrument in question has not been applied.

#### 2.2.2. Private storage

When the Community market price and the market price of a given quotation area are less than 90% of the seasonally adjusted basic price and likely to remain so, private storage aids may be decided on for the quotation area in question; if the two above-mentioned prices are below 85% of the seasonally adjusted basic price, the private storage aids which may be decided on must be based on a tendering procedure.

Where the market price for a quotation area is less than 70% of the seasonally adjusted basic price for two consecutive weeks, the Commission must decide to initiate a tendering procedure for the granting of private storage aids in the quotation area in question.

### 2.2.3. Premiums

#### (a) Ewe and goat premium

The loss of income, which represents the difference between the basic price and the arithmetical mean of the market prices recorded during the marketing year, is calculated at the end of the marketing year. The amount of the premium payable per ewe is obtained by multiplying the loss of income by the average annual production of lamb per ewe.

The premium is paid in full on the first 1 000 animals per producer in less-favoured areas and the first 500 per producer in other areas. Beyond these limits, the premium is reduced by 50%.

The Member States are authorized to pay all their producers two six-monthly advances of 30% of the foreseeable amount of the premium. The amount of the final premium is fixed at the end of the marketing year, and the balance is paid accordingly.

In some clearly defined regions of the Community, eligibility for the premium has been extended to two categories of animal, namely she-goats and certain female sheep other than ewes. In these cases, the unit amount corresponds to 70% of the ewe premium.

A distinction is made between ewes producing heavy lambs and those producing light lambs. The calculation of the loss of income and the productivity coefficient are limited to the production of heavy lambs. The resulting amount is granted on ewes producing heavy lambs, while for ewes producing light lambs the amount is reduced by 30%.

#### (b) Variable slaughter premium

Up to the end of the 1991 marketing year, the United Kingdom could grant a sheep slaughter premium in the region of Great Britain. The ewe premium payable in Great Britain was reduced to take account of the variable premiums actually granted.

The variable slaughter premium was abolished at the end of the 1991 marketing year.

### 2.3. Stabilizer

From 23 May 1988, where the ewe headage for a marketing year exceeds the maximum guaranteed quantity, the premiums are reduced by the impact on the basic price of a coefficient representing a 1% cut in the basic price for each 1% tranche by which the maximum guaranteed quantity is exceeded.

### 2.4. Proposals in connection with the reform of the common agricultural policy

In view of the increase in expenditure in this sector, the Commission has proposed that the Council:

- apply an individual limit on guarantees, each producer being able to receive the ewe (or she-goat) premium only within the limit of the quantities received for the 1991 marketing year (after deduction of 1% to resource a national reserve). Also, where the ewe headage in a Member State increased between 1990 and 1991 the increase would be deducted from the individual limits of each producer;
- lower the limits: 750 animals per producer in less-favoured areas and 350 animals per producer in other areas.

DESCRIPTION OF THE MECHANISMS

OF THE COMMON MARKET ORGANIZATION FOR PIGMEAT (\*)

The pigmeat market organization is governed by Regulation (EEC) No 2759/75, as last amended by Regulation (EEC) No 1249/89.

The products covered are:

- live animals
- meat, offal, bacon and fats,
- processed products: preserves, sausages, etc.

The marketing year runs from 1 July to 30 June.

Expenditure in this sector varies around 1% of total EAGGF Guarantee expenditure.

**1. ECONOMIC BACKGROUND**

In 1991, about 14,3 million t of pigmeat was produced in the Community (EUR-12, including the former GDR), an increase of 2,3% on the previous year.

The situation on the market in pigs in the Community was favourable in 1991. The rise in prices resulted from a substantial reduction in pig production in the new German Länder, a shortage of piglets, especially in the Netherlands and Germany on account of animal health problems and good export performance.

Production in 1992 is expected to fall by 2,6%.

During the first quarter of 1992, pig carcass prices remained stable at a fairly high level.

Overall self-sufficiency in 1991 was between 104 and 105%.

As for trade with non-member countries, imports are estimated at 43 000 t in 1991 and exports at 595 000 t, excluding offal and lard. The increase in exports over 1990 (510 000 t) was due to exceptionally large exports to the former USSR.

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(\*) Translated from "Avant-projet de budget général des Communautés européennes pour l'exercice 1993".

## 2. OPERATION OF THE MARKET

### 2.1. Price arrangements

The pigmeat market organization has three prices:

- (a) The basic price: this price is fixed every year by the Council, in the light of the sluice-gate price and the levy applicable in the three-month period beginning on 1 July of each year and of the need for a price at a level such as to help ensure stable prices on the markets without engendering structural surpluses in the Community.
- (b) The buying-in price: This price is derived directly from the basic price (between 78 and 92% of the latter for carcasses of standard quality). When intervention purchasing is in operation the intervention agencies buy in at this price. It is fixed by the Commission by the management committee procedure. There has been no intervention purchasing since 1971.
- (c) The sluice-gate price: This price is calculated for each three-month period by the Commission and corresponds to cost prices in non-member countries. It is based on world market feed prices and on the other costs of production.

The sluice-gate price is used for the calculation of the additional amount which may be charged on imports.

### 2.2. Specific market instruments

#### 2.2.1. Import and export arrangements

Imports attract a levy which depends primarily on the difference between the world market price and the Community market price of the quantity of feed grain necessary for the production of 1 kg of pigmeat in the EEC.

For products bound under GATT, the levies may not exceed the limit agreed.

Whenever imports from non-member countries are offered at a price below the sluice-gate price, an additional amount may be added to the levy. The increased levy is applicable to the relevant product and to the non-member country concerned.

Exports qualify for a refund fixed, for each product, uniformly throughout the Community but which may be varied according to intended use/destination. The refund is based on the difference between the world market price and the Community price.

### 2.2.2. Storage

Buying-in - Public storage: Pigmeat may be bought in whenever the Community market price for carcasses, established on the basis of prices recorded in each Member State on the EEC representative markets and weighted by coefficients expressing the relative size of the pig herds of each Member State, is below 103% of the basic price and is likely to remain at this level.

When intervention purchasing is in operation the intervention agencies buy in at the buying-in price referred to under 2.1.

Private storage aid: This is the commonest kind of intervention, because of its greater flexibility.

The aid is fixed:

- either by tendering procedure,
- or at a flat rate in advance, (the method actually used).

Normally it may not exceed an amount corresponding to the costs which would be involved in storage under public intervention arrangements. It always allows for storage costs, normal quality loss and, as far as possible, the foreseeable increase in the price of the product.

**DESCRIPTION OF THE MECHANISMS**

**OF THE COMMON MARKET ORGANIZATION FOR POULTRY (\*)**

The poultry market organization is governed by Regulation (EEC) No 2777/75, as last amended by Regulation (EEC) No 1235/89.

The products covered are as follows:

- poultry: live, dead and offal, poultry liver, poultry fat, other preparations.

There is no marketing year for poultry.

In the past, expenditure on poultry has remained below 1% of total EAGGF Guarantee spending.

**1. ECONOMIC BACKGROUND**

In 1991, the Community of Twelve's gross internal production of poultrymeat was 6,62 million t (+2,4% compared with 1990).

Consumption increased by 2,1% to an average of 18 kg per person.

The degree of self-sufficiency in 1991 was 105,7% (+0,6%).

As regards trade, imports in 1991 rose by 11,6% (154 000 t). Exports were also up 11,4% on 1990, to a tonnage of 479 000 t.

**2. OPERATION OF THE MARKET**

**2.1. Price arrangements**

The common organization for poultry is very flexible. There are no guaranteed prices but only a set of measures designed to improve the organization of production, processing and outlets and to achieve an improvement in quality and forecasts. There are no arrangements for intervention.

There is, however, a sluice-gate price, fixed in advance for each quarter by the Commission by the management committee procedure. The sluice-gate price corresponds to the cost of production in non-member countries and is made up of:

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(\*) Translated from "Avant-projet de budget général des Communautés européennes pour l'exercice 1993".

- an amount equal to the world market price of the quantity of feed grain needed for the production in non-member countries of 1 kg of the relevant product;
- a standard amount expressing the other feed costs and general production and marketing overheads.

## 2.2. Specific market instruments

### 2.2.1. Import and export arrangements

Imports of poultry attract a levy fixed in advance for each quarter. The levy is made up of:

- a component matching the difference between Community prices and world prices of the quantity of feed grain needed to produce 1 kg of the relevant product;
- a component of 7% of the average sluice-gate prices for the four quarters preceding 1 April of each year.

Where, for a given product, the free-at-frontier offer price falls below the sluice-gate price, the levy may be increased by an additional amount equal to the difference between the sluice-gate price and the offer price.

Exports may qualify for refunds, which may be varied according to intended use/destination.

## Reform of the common agricultural policy (\*)

The market organizations for animal products have already undergone considerable changes in recent years, particularly in 1984, when milk quotas were introduced, and in 1988, when far-reaching changes were made to the intervention system for beef and the premiums for sheep and bovine animals.

As part of the reform, the Council confirmed the main changes already made and took some of them further.

### 1. Beef/veal

The reform affects beef prices, premiums and intervention, as well as meeting environmental concerns.

To avoid excessive concentration of livestock, the Council decided to restrict support through premiums to a maximum density of livestock per hectare of forage area.

The new maximum densities, to be introduced gradually, are:

- 1993: 3.5 LU per hectare of forage area
- 1994: 3 LU per hectare of forage area
- 1995: 2.5 LU per hectare of forage area
- from 1996: 2 LU per hectare of forage area.

The number of animals will include all those for which applications for premiums have been made and the dairy cows required to produce the reference quantity of milk allocated to the holding.

Forage areas will be calculated according to Community-wide rules and will include both areas exclusively allocated to forage production and, in proportion to the amount of fodder they produce, those used both for animal fodder and the production of crops not intended for animals. Areas producing ensilage maize or other ensilage crops which receive compensatory payment under the arrangements for arable land will not be included in the forage area.

The restriction on the maximum number of animals does not apply to small holdings with less than 15 LU.

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(\*) The text which follows is made up mainly of long extracts from "The Reform of the Common Agricultural Policy" - CAP Working Notes 1992

### Prices

The intervention price for beef will be reduced by 15% over three years as shown below:

	Intervention price for beef per 100 kg carcass weight
1 July 1993	325.85
1 July 1994	308.70
1 July 1995	291.55

### Premiums

Beef producers may qualify for four premiums:

- special premiums
- suckler cow premiums
- processing premiums
- extensive breeding premiums.

The existing special premium for male animals, payable for up to 90 animals per producer, will continue at the rate of 60 and 75 ECU respectively for 1993 and 1994 and 90 ECU from 1995 onwards. It is payable no more than twice in the life of each animal, at the ages of 10 and 22 months. Each Member State must lay down a regional reference herd equal to the number of premiums paid in one of the years 1990, 1991 and 1992. If this regional reference figure is exceeded, the number of animals eligible per producer is reduced proportionately. Individual reference figures may also be established if the Member States so desire.

In order to make slaughter less seasonal when, in a Member State, the percentage of male animals slaughtered between September and November exceeds 40% of the total number of that category slaughtered during the year, an additional premium of ECU 60 per animal is payable if, and only if, those animals are slaughtered between 1 January and 30 April. A report on this system, which is being introduced as an experiment, will be made to the Council and may be accompanied by proposals on its effects.

The suckler cow premium will also be continued, at a rate of 70 and 95 ECU per cow for the 1993 and 1994 calendar years respectively and 120 ECU from 1995 onwards, but will now be limited for each producer to the number of premiums paid in 1990, 1991 or 1992.

A national reserve and the possibility of transferring premium rights in the same way as for sheep have been introduced.

Depending on their structures of production, the Member States may introduce either a calf processing premium or an intervention scheme for light animals.

These measures are intended to reduce the production of beef, which has been in surplus in recent years, by granting a premium of ECU 100 for each male dairy-breed calf slaughtered before the age of 10 days or, alternatively, by introducing intervention, under rules to be laid down and for a transition period of three years, for animals with a carcass weight between 150 and 200 kg.

As a further contribution towards encouraging extensive production paying attention to environmental considerations, the premiums payable for male animals and suckler cows will be increased by ECU 30 per head on holdings where producers can demonstrate that the number of animals over the year has been less than 1.4 LU per hectare of forage.

#### Intervention

There will also be changes to the arrangements for intervention in the beef sector. These consist of:

- the imposition of ceilings for buying into intervention:

1993:	750 000 tonnes
1994:	650 000 tonnes
1995:	550 000 tonnes
1996:	400 000 tonnes
1997:	350 000 tonnes.

- the provision of a safety net in any Member State where over a reference period the market price is less than 60% of the intervention price. Purchases made under the safety net system would be not be counted against the quantities set out above;
- restricting intervention to good quality meat, so excluding, from 1993, young male category 0 calves. In those Member States where this category currently accounts for more than 60% of male bovine animals slaughtered, this provision will not apply immediately. Intervention will be spread over the period 1993-97 through application of a degressive ceiling on the maximum quantity which can be delivered into intervention following each tender.

## **2. Sheepmeat**

The current system of premiums will continue with ceilings for producers fixed at 1 000 head in less-favoured areas and 500 head elsewhere. For animals in excess of those ceilings, only 50% of the premium per head will be paid.

There will be an individual limit per producer based on the number of premiums paid for 1991 multiplied by a coefficient determined on the basis of the reference figures calculated by each Member State for 1989, 1990 or 1991. That limit constitutes a right to the premium subject to the following considerations.

To deal with producers submitting an application for the first time and any exceptional circumstances which may arise, a national reserve of between 1% and 3% of the total of the individual limits for each producer will be set up. The quantities in this reserve will be deducted from the premium rights of individual producers.

There will also be an additional reserve of 1% of the individual rights of producers in the less-favoured regions of each Member State, to be used exclusively for those regions on the basis of criteria to be determined by each Member State.

Premium rights will accrue to producers registered during the reference period who continue production.

The premium for light animals and goats will be 80% of the standard premium instead of 70%.

Transfers of rights between producers and between regions will be regulated. The Member States will have to take the steps required to ensure that premium rights are not transferred out of sensitive areas or regions where sheep production is of particular importance for the local economy. The Member States may stipulate that transfers are to be made freely between producers or through a national reserve mechanism.

When a producer sells or transfers his holding in some other way, he may transfer all his premium rights to his successor. He may also transfer his rights to other producers without transferring his holding but, if he does so, a proportion of his rights, not exceeding 15%, will revert without payment to the national reserve. The rights acquired by the national reserve will be distributed free of charge to new farmers or other priority producers. Detailed implementing rules have still to be laid down at Community level.

### **3. *Other animal products***

There are no changes to the market rules for other animal products: pigmeat, poultry and eggs. The reduction in cereals prices will have a positive impact on the economics of production by reducing the price of animal feed and this will be taken into account in the trade mechanisms.

**Trend of appropriations (\*)**

(ECU)

Article	Heading	Appropriations 1993	Appropriations 1992
B1-210	Refunds on beef/veal	1.535.000.000	1.117.000.000
B1-211	Intervention storage of beef	1.438.000.000	2.352.000.000
B1-212	Intervention other than storage of beef	838.000.000	1.000.000.000
<b>TOTAL OF CHAPTER B1-21 (BEEF/VEAL)</b>		<b>3.811.000.000</b>	<b>4.469.000.000</b>
B1-220	Export refunds for sheepmeat and goatmeat	p.m.	p.m.
B1-221	Intervention in the form of storage of sheepmeat and goatmeat	9.000.000	9.000.000
B1-222	Intervention other than storage of sheepmeat and goatmeat	1.824.000.000	1.813.000.000
<b>TOTAL OF CHAPTER B1-22 (SHEEPMEAT AND GOATMEAT)</b>		<b>1.833.000.000</b>	<b>1.822.000.000</b>
B1-230	Refunds on pigmeat	197.000.000	179.000.000
B1-231	Intervention for pigmeat	34.000.000	10.000.000
B1-239	Other intervention	25.000.000	p.m.
<b>TOTAL OF CHAPTER B1-23 (PIGMEAT)</b>		<b>256.000.000</b>	<b>189.000.000</b>
B1-241	Refunds on poultrymeat	199.000.000	165.000.000
B1-249	Other intervention	p.m.	p.m.
<b>TOTAL OF CHAPTER B1-24 (EGGS AND POULTRY-MEAT) FOR WHAT CONCERNS POULTRYMEAT</b>		<b>199.000.000</b>	<b>165.000.000</b>

(\*) Extracted from "Final adoption of the general budget of the European Communities for the financial year 1993"  
- OJ L 31, 8.2.1993.

THE SITUATION OF THE MARKETS (\*)

## Beef and veal

Despite the relatively depressed state of the international economy and a fall-off in domestic demand, particularly in the countries of Central and Eastern Europe as a result of the changes in economic and political direction, world prices for beef and veal remained relatively firm at the beginning of the 1990s due to a world-wide drop in supply. This drop in production is due essentially to two factors:

- (i) a pronounced fall-off in the countries of Central and Eastern Europe; and
- (ii) a reduction in supply in the producer countries of the southern hemisphere linked to the development phase of their production potential.

In North America, where the beef herd is currently making a slow recovery, efforts are being made to increase both domestic production and the supply available for export, particularly to Japan, and to impose voluntary restraint agreements on the principal foreign suppliers, especially those in Oceania.

The European Community produces about 16 % of total world production of beef and veal and is now second in the ranking of producers, behind the United States (20 %) and ahead of the CIS (13 to 14 %).

Cattle rearing in the European Community accounts for about 30 % of total farm production (meat: 13 %; milk: 17 %) and involves approximately one out of every two holdings. The number of cattle farmers fell on average by around 4 % a year since the 1980s and stood at approximately 2.4 million at the beginning of 1990. The average number of cattle on each holding is about 33 head, increasing at an average rate of 3.5 % a year.

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(\*) Extract from "The agricultural situation in the Community. 1992 report."

**Production of beef and veal**

(1 000 t carcass weight)

	1990	1991	% change	1992	% change
USA	10 465	10 531	+0.7	10 759	+2.2
USSR/CIS	8 700	8 090	-7.0	7 600	-6.1
Argentina	2 690	2 580	-4.0	2 647	+2.6
Brazil	2 835	2 884	+1.8	3 000	+4.0
Australia	1 724	1 724	±0.0	1 708	-0.1
Japan	551	574	+4.2	580	+1.0
EUR 12 <sup>1</sup>	7 790	8 725	(-5.1)	8 275	-5.1
World	53 745	52 830	-1.7	53 400	+1.1

<sup>1</sup> EUR 12, including the new *Länder* of eastern Germany, from 1991 on.

Market prices for beef and veal in the Community fell very sharply in 1990 and 1991 as a result of various factors such as the constant increase in supply which underwent a cyclical upturn during the period, the slaughter of part of the dairy herd in the five new German *Länder*, and a change in attitude on the part of consumers who are turning more readily to lower priced white meats. Market prices steadied somewhat in the Community in 1992.

Massive buying into intervention at ever lower prices, some of which was undertaken as part of the 'security net' mechanism, produced very high stocks even though exports increased considerably from 1990 to 1992.

Despite the reduction in the thresholds for intervention measures, buying-in increased significantly, reaching 900 000 tonnes in 1991/92 as against 800 000 tonnes in 1990/91.

The level of buying-in prices is now effectively 25 % lower than the intervention price and withdrawals during the autumn off-grass period were around 20 000 tonnes a week.

Community production entered a cyclical downturn in 1992. Supply was also held back by the restructuring of stockfarming in the five new *Länder* as well as by the relative capitalization currently involving some holdings, notably those involving suckler cows. The result should be better price stability and a reduction in intervention from early 1993 onwards.

Exports of beef and veal (including live animals) to non-member countries benefited from a favourable, less competitive environment and increased to 1.3 million tonnes in 1991. Imports also increased, rising to 535 000 tonnes, and resulting in a positive trade balance of 790 000 tonnes.

On the basis of the development of cattle numbers on the one hand and general long-term market trends on the other, the cyclical downturn in beef and veal production can be expected to continue during the second half of 1992 and in 1993.

## Sheepmeat and goatmeat

The Community's position as the world's leading producer, importer and consumer of sheepmeat is firmly established. Production at 1.2 million tonnes represents about 16 % of the world total while consumption now has reached 1.45 million tonnes. Community exports, however, are negligible. World exports are dominated by New Zealand with up to 400 000 tonnes annually and Australia which, in addition to approximately 200 000 tonnes of meat, also exports up to 5 million live animals annually. With the exception of the Community, wool production is often the more important element in sheep production world-wide as evidenced by flock size in China (210 million), Australia (170 million) and the former USSR (130 million). However, continuing difficulties on the world wool market and stocks, notably in Australia, may lead to a decrease in sheep numbers in coming years. Additionally, severe weather at lambing time in New Zealand in 1992 may result in a decrease in production there in the 1992/93 season with knock-on effects on exports.

### Production of sheepmeat

(1 000 t)

	1990	1991	% variation	1992 (estimate)	% variation
EUR 12	1 182	1 222	+3.4	1 191	-2.5
Australia	632	682	+7.9	660	-3.2
New Zealand <sup>1</sup>	534	570	-6.7		

<sup>1</sup> Year ended 30 September.

On the Community market, production is forecast to fall by 2.5 % to 1 191 000 tonnes in 1992, due mainly to falls of approximately 20 000 tonnes in both UK and German production. These falls are related principally to the ending of the variable slaughter premium scheme at the end of 1991 in Great Britain and the destocking of wool-producing sheep in the new *Länder* of Germany following unification. Irish production is set to rise by 7 000 tonnes. Community sheep numbers are set to remain at 98 million head, unchanged from 1991. Consumption is set to rise by just 0.3 % to 1 447 000 tonnes balancing a decline of 5.2 % in the UK with increases of 5.4 % in Germany, 4.8 % in Italy and 2.8 % in Ireland.

Intra-Community trade is forecast to rise by 7 % in 1992 to 245 000 tonnes. An increase of 12 % is forecast in UK exports as trade reacts to the ending of clawback on exports. In France, imports are forecast to reach 165 000 tonnes, up 9 % on 1991.

Market prices to date, in 1992, have varied considerably from the traditional pattern. The strong market early in the year, notably in the UK where supplies were scarce, gave way to a particularly poor Easter trade, especially in the north of the Community, with prices well down on 1991. Since June, however, prices in several markets, and particularly the UK and Spain, have improved substantially. At Community level the 1992 market price is forecast at ECU 279 per 100 kg lamb—a rise of 5% on 1991.

In 1992, imports into the Community should be slightly above the levels of 1991, reaching approximately 270 000 tonnes. Imports from New Zealand and Australia will reach 205 000 tonnes and 17 000 tonnes respectively while imports from Eastern Europe should reach 30 000 tonnes. Community exports are likely to be down very significantly on the exceptional quantity of 19 000 tonnes achieved in 1991 due to the export of 14 000 tonnes from the new German *Länder*.

The reform of the sheep regime, agreed in September 1989 (Council Regulation 3013/89), took full effect in 1992 following the transition years of 1990 and 1991. The main achievement of this reform is a unified regime with a common premium throughout the Community differentiated only in so far as ewes are kept for meat or milk production purposes. In 1992, the Council increased the premium for milk-producing ewes from 70 to 80% of that paid on ewes kept for meat production.

In addition to the 1989 internal reform, adaptations agreed by the Community with its trading partners under the voluntary restraint agreements for the period up to the end of 1992 have had the effect of reducing possible imports under these arrangements by approximately 45 000 tonnes and of reducing the levy on imports from 10 to 0%. Discussions on import arrangements under these agreements in 1993 are currently in progress.

In 1991, the three mechanisms available for market support were each in use. The variable premium, in its final year of application, averaged ECU 81 per 100 kg which represents 42.5% of the market price in Great Britain. Ewe premiums were set for all regions for 1991. The stabilizer mechanism which applies to the basic price for premium calculation purposes was set at 5.9% for the Great Britain and 7% for the remainder of the Community. Private storage, operated under a tendering procedure each month, throughout the year attracted only 2 100 tonnes of lamb, mainly in Great Britain.

In 1992, two advances on the ewe premium were fixed totalling ECU 11.186/head. Private storage tendering has been in use throughout the year and so far 2 100 tonnes of lamb, mainly in Great Britain, has been aided by this mechanism.

The outlook for 1993 is for stability or a slight rise in production due to the influence of the stabilizer mechanism and the premium quota regime introduced in the recent reform of the common agricultural policy. Consumption is forecast to rise by 0.3%. Sheep numbers should remain stable at 98 million head. Intra-Community trade should continue to grow but at a considerably slower rate than heretofore.

## Pigmeat

World production of pigmeat, which is around 60 million tonnes, fell slightly between 1990 and 1992 due primarily to a drop in production in the Community, the countries of Eastern Europe and the countries of the former Soviet Union. China remains the world's major pigmeat producer, followed by the Community. In the United States, the pigmeat sector is in a strong period of expansion, with production increasing by 11 % between 1990 and 1992.

### World pigmeat production

(1 000 t)

	1990	1991	1992 (estimate)
China	22 811	23 009	23 100
USA	6 936	7 234	7 730
Eastern Europe	5 623	5 592	5 554
USSR/CIS	6 646	6 150	5 550
Japan	1 555	1 483	1 438
Taiwan	1 009	1 115	1 200
Canada	1 203	1 200	1 230
EUR 12 <sup>1</sup>	14 698	14 338	14 200
<b>Total</b>	<b>60 481</b>	<b>60 121</b>	<b>60 002</b>

Sources: USDA, Eurostat, OECD.

<sup>1</sup> Including the five new German *Länder*.

For some 16 months now the market for pigmeat in the Community has been quite favourable. The reduction in the pig supply since the spring of 1991 has resulted in satisfactory prices for producers, reaching between ECU 140 and 160/100 kg dead-weight for much of the period in question. Even if prices did not reach the levels of 1989 and 1990, the prices achieved on the markets in 1991 and 1992 did not fall heavily as in previous years but showed remarkable stability.

The fall-off in the supply of pigs in the Community is mainly due to a significant reduction in the pig herd in the new German *Länder* as well as the appearance of a new porcine disease which caused severe losses in piglet production, particularly in the Netherlands and Germany.

The Community pigfeed index remained well above 100 for the whole year, so overall profitability in the pig fattening sector was satisfactory.

A tougher time for the pigmeat sector is expected in the near future because the pig herd had increased throughout the Community by autumn 1992. A marked increase in production is therefore to be expected, with a consequent drop in prices.

Community production of pigmeat is running at about 14.3 million tonnes. The sector represents in value terms 10.3 % of final agricultural production. European consumption currently stands at around 40 kg per year per person. This average disguises significant variations, however, as consumption varies from 23 kg in Greece to 57 kg in Germany. It should be stressed that the consumption figures are the result of an overall calculation based on the supply balance and include the parts of the carcass which are not used for human consumption. Expert opinion is that actual human consumption is around 20 to 30 % lower than the calculated figures.

External trade in pigmeat is important for supply and balance on the Community market. Intra-Community trade involves some 3 million tonnes each year. Exports to non-member countries amounted to 677 000 tonnes in 1991. Imports, primarily from the countries of Eastern Europe, amounted to 115 000 tonnes. The level of imports is modest, therefore, but should increase in the coming years as a result of the various international agreements concluded by the Community.

## Poultrymeat

During the last six years world production of poultrymeat has increased steadily by an average of 4.4 % a year. In the United States (25 % of world production), the rate of increase has been even higher (5.4 %). Poultrymeat is the meat that Americans now prefer and per capita consumption in the last five years has exceeded that of beef and veal. In the case of the other main producer regions, production is increasing in Brazil but is falling in Eastern Europe, including the former USSR, and in Japan.

Poultrymeat production

(1 000 t)

	1987	1988	1989	1990	1991	1992
USA	9 105	9 428	10 032	10 844	11 426	11 262
Brazil	1 865	1 997	2 139	2 400	2 643	2 780
Japan	1 465	1 471	1 482	1 467	1 455	1 446
USSR/CIS	3 126	3 184	3 300	3 350	3 480	3 200
Eastern Europe	2 068	2 062	1 999	1 939	1 985	1 856
EUR 12 <sup>1</sup>	5 783	5 995	6 108	6 336	6 712	6 878

Sources: USDA; DG VI.

<sup>1</sup> Includes the five new German *Länder* from 1991 onwards.

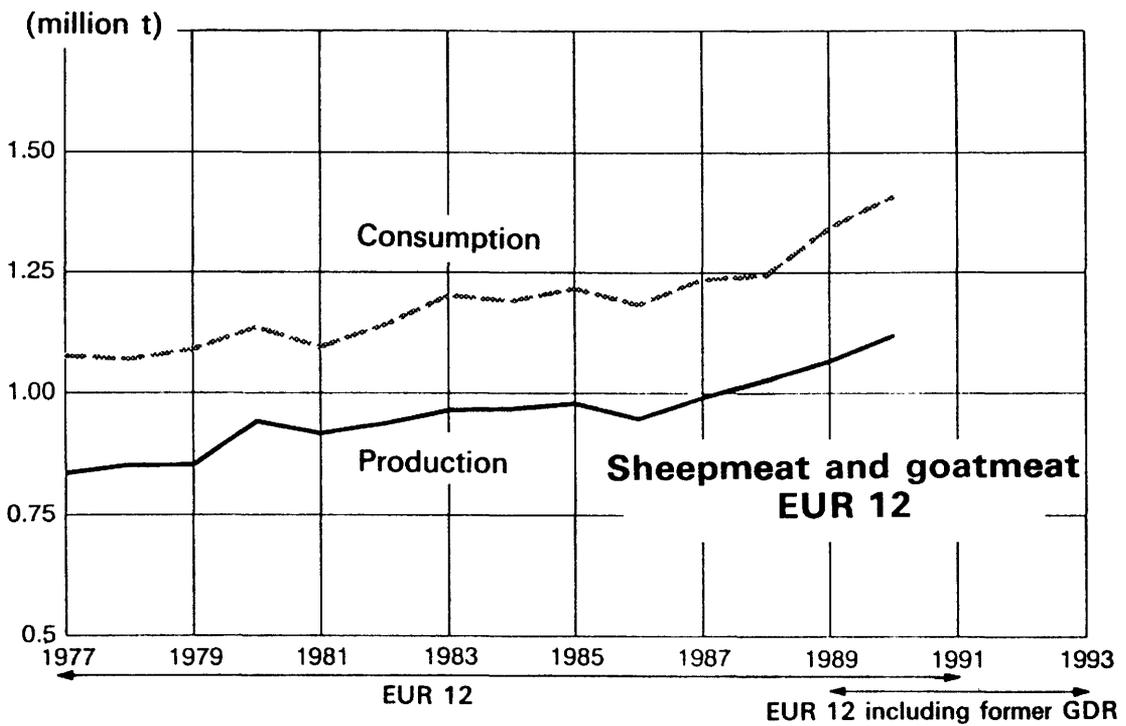
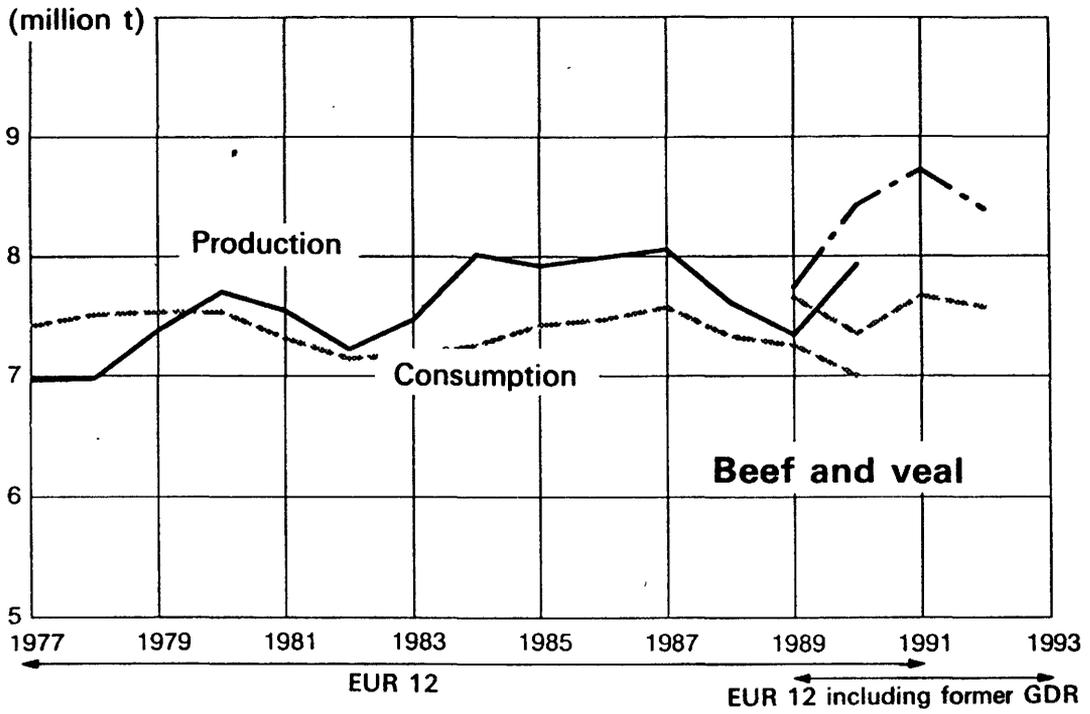
The world market expanded slightly in 1992, thanks in particular to growing demand from the Far East and renewed demand in the Middle East. The USA retained first place in the league of exporting countries due in particular to its various promotional programmes. For the first half of 1992, Community exports of poultrymeat remained stable at 1991 levels.

In 1992, total production of poultrymeat on the Community market increased by 2.5 %. The chicken sector (70 % of total production) had a difficult year, so large stocks of frozen chickens still exist in several Member States. The situation in the turkey and duck sectors improved at the end of 1991 and the beginning of 1992, as can be seen from the high rates of placings of turkey poults and ducklings.

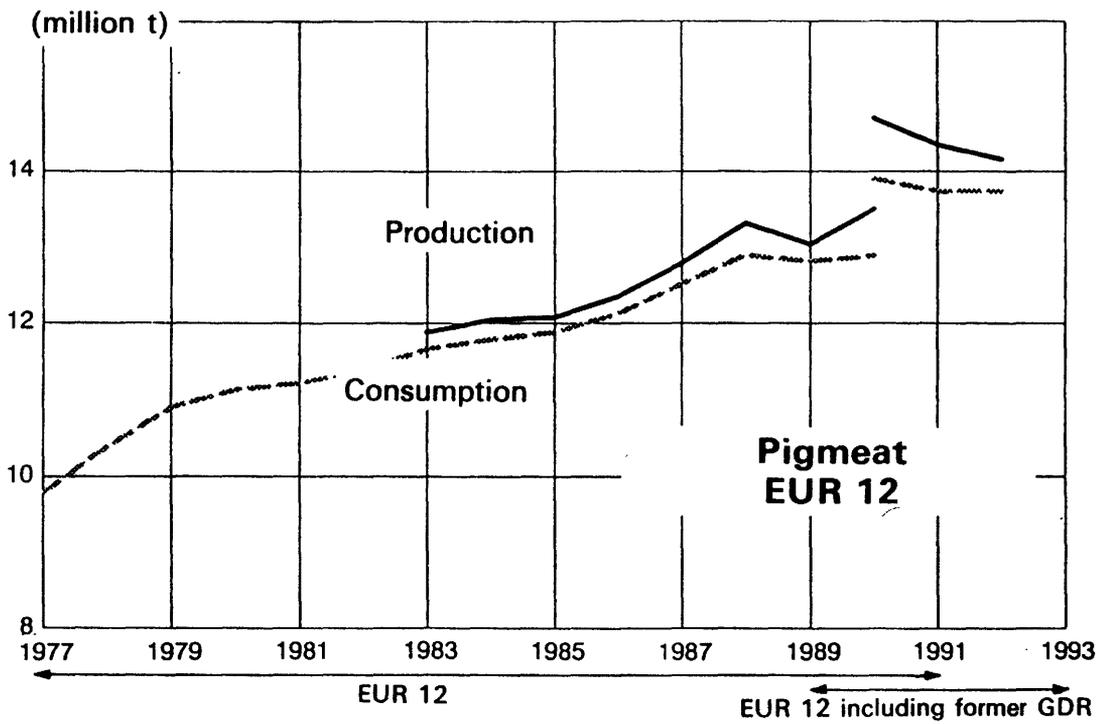
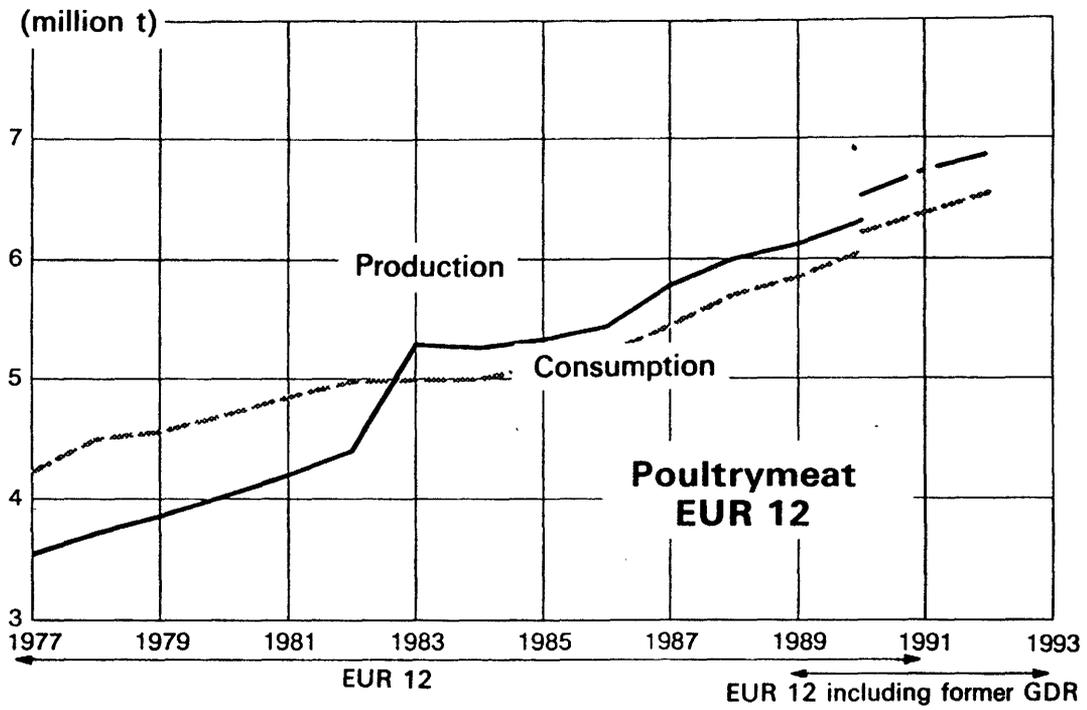
There is no internal market support for poultrymeat. The rules governing trade with non-member countries have been adapted to the world market situation by differentiating export refunds according to destination so as not to lose traditional markets.

In 1992 the concessions granted by the Community under the generalized system of preferences to developing and ACP countries continued. The association agreements concluded with Hungary, Poland and the Czech and Slovak Federal Republic involve a 50 % reduction in the levies on certain quantities of goose and duck and 20 % for other poultry products, within certain quota limits. For the latter products, the levy reduction will be increased to 40 % on 1 January 1993, with a 10 % rise in quotas.

## Meat



# Meat



COMMISSION PRICE PROPOSALS (\*)

BEEF AND VEAL

It is proposed to extend the 1992/93 marketing year to 1 July to maintain the present intervention and guide prices until that date, when the new reform prices come into operation.

SHEEPMEAT AND GOATMEAT

The basic price for the 1993 marketing year was set in the 1992/93 prices package. The Commission proposes no change for 1994.

PIGMEAT

The basic Regulation for pigmeat provides for the fixing of a basic price. Its level is meant to signal the level of prices at which the market will be in balance and to reflect the level of the sluicgate price plus levy. Its only operational purpose is to provide a trigger for possible private storage measures. Such measures may be initiated when the average market price in the Community falls below 103% of the basic price. The basic price is in force from 1 July to 30 June.

For the period July 1990 to June 1993 the basic price for pig carcasses of standard quality stands at ECU 1897.00 per tonne.

Over the years the basic price has been allowed to drift away from its intended level and it has become operationally irrelevant. It is therefore appropriate to propose a significant reduction in the price to bring it back to its original purpose and to take account of the effect on levies and the sluicgate price of the reduction in cereal prices.

This cut does not involve any reduction in market prices beyond what can be expected to arise in any event from the reduction in feed costs arising from the reform but it may serve as a warning against an excessive expansion of production.

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(\*) Extracted from "Commission proposals on the prices for agricultural products and on related measures 1993/94 - Explanatory memoranda [COM(93) 36 final - Vol. 1]

It is proposed to fix the level of the basic price for the 1993/94 marketing year at 1450.00 ECU/tonne.

The definition of standard quality of pig carcasses should remain at:

- (a) carcass weighing 60 kg to less than 120 kg: grade U,
- (b) carcass weighing 120 kg to 180 kg: grade R.

**Price proposals in ECUs**

Product and type of price or amount (Period of application)	Decisions 1992/93		Proposals 1993/94	
	Amounts ECU/T	% change	Amounts ECU/T	% change
1.7.93-30.6.94 Beef/veal - Guide price for adult bovine animals (1) (2)	2 000	0	2 000	0
4.1.93-2.1.94 Sheepmeat - Basic price (carcass weight)	4 229,5	- 2	4 185,3 (3)	0
1.7.93-30.6.94 Pigmeat - Basic price (carcass weight)	1 897	0	1 450	- 24

(1) Price per tonne (liveweight).

(2) The intervention prices were fixed under the reform (see p. 18).

(3) With agrimonetary correction.

**STATISTICAL TABLES (\*)**

**Cattle numbers (December of previous year)**

	1 000 head			% of EUR 12	% TAV	
	» 1987 «	1991	1992	1992	» 1990 « » 1987 «	1992 1991
1	2	3	4	5	6	7
EUR 12	80351	84603	81235	100,0	2,0	- 3,9
Belgique/België	2961	3146	3109	3,8	1,0	- 1,2
Danmark	2348	2241	2222	2,7	- 1,7	- 0,9
BR Deutschland	14950	19488	17134	21,1	10,3	- 12,1
Ellada	733	687	631	0,8	- 2,0	- 8,2
España	5018	5104	4924	6,1	0,6	- 3,5
France	21521	21446	20970	25,8	- 0,2	- 2,2
Ireland	5614	6029	6073	7,5	1,4	1,0
Italia	8887	8235	8087	9,9	- 0,9	- 1,8
Luxembourg	210	215	205	0,3	0,0	- 4,7
Nederland	4692	4830	4876	6,0	0,2	0,9
Portugal	1340	1340	1381	1,7	0,1	3,1
United Kingdom	12077	11843	11623	14,3	- 0,5	- 1,9

**Supply balance — beef/veal**

EUR 12

	1 000 t (2)			% TAV	
	» 1987 «	1990	1991	» 1990 « » 1987 «	1991 1990
1	2	3	4	5	6
Gross internal production	7889	7700	8707	0,1	13,1
Net production	7962	7790	8725	0,1	9,5
Changes in stocks	x	361	258	x	- 28,5
Imports (1)	412	399	447	0,4	12,0
Exports (1)	912	782	1244	3,4	59,1
Intra-Community trade (2)	1640	1821	2035	4,6	11,8
Internal use (total)	7557	7046	7670	- 0,8	8,8
Gross consumption (kg/head/year)	23,4	21,6	22,2	- 1,7	2,8
Self-sufficiency (%)	104,4	109,6	113,6	1,0	3,6

Source: Eurostat and EC Commission, Directorate-General for Agriculture.

(1) Total trade, with the exception of live animals.

(2) All trade, including live animals (figures based on imports).

(3) Carcass weight.

(\*) Extract from "The agricultural situation in the Community. 1992 report".

Sheep and goat numbers (preceding December)

1	1 000 head			% of EUR 12	% TAV	
	» 1987 «	1990	1991	1991	$\frac{\text{» 1990 «}}{\text{» 1987 «}}$	$\frac{1991}{1990}$
2	3	4	5	6	7	
<i>Sheep</i>						
EUR 12	89023	98161	99506	100,0	3,3	1,4
Belgique/België	128	132	136	0,1	1,0	3,3
Danmark	65	97	111	0,1	14,7	14,4
BR Deutschland	1364	1533	1784	1,8	5,3	16,4
Ellada	10612	10353	10150	10,2	- 1,0	- 2,0
España	19267	22730	24022	24,1	6,5	5,7
France	12140	11208	11071	11,1	- 2,5	- 1,2
Ireland	3759	5782	6001	6,0	14,2	3,8
Italia	11400	11569	10848	10,9	- 0,2	- 6,2
Luxembourg	5	7	7	0,0	11,9	0,0
Nederland	1140	1725	1870	1,9	13,5	8,4
Portugal	3012	3347	3360	3,4	3,1	0,4
United Kingdom	26130	29678	30147	30,3	4,3	1,6
<i>Goats</i>						
EUR 12	12136	13938	14518	100,0	5,1	4,2
Belgique/België	7	8	8	0,1	4,0	0,0
Danmark	0	0	0	0,0	×	×
BR Deutschland	46	58	70	0,5	9,3	20,7
Ellada	6057	5904	5918	40,8	- 0,7	0,2
España	2934	4451	5014	34,5	16,1	12,7
France	996	1226	1162	8,0	6,4	- 5,2
Ireland	0	0	0	0,0	×	×
Italia	1192	1246	1298	8,9	1,7	4,2
Luxembourg	1	1	1	0,0	0,0	0,0
Nederland	45	72	77	0,5	15,9	6,9
Portugal	803	857	857	5,9	2,0	0,0
United Kingdom	55	114	113	0,8	×	- 0,9

Source: Eurostat.

Supply balance — sheepmeat and goatmeat

EUR 12

	1 000 t			% TAV	
	» 1987 «	1990	1991	$\frac{1990}{1987}$	$\frac{1991}{1990}$
1	2	3	4	5	6
Gross internal production	993	1182	1222	5,6	3,4
Imports — live animals <sup>(1)</sup>	21	25	22	3,1	- 12,4
Exports — live animals <sup>(1)</sup>	1	1	6	40,9	321,4
Intra-Community trade <sup>(1)</sup>	29	58	65	23,0	12,1
Net production	1007	1206	1238	5,7	2,7
Changes in stocks	- 9	:	:	x	x
Imports <sup>(2)</sup>	229	259	236	1,9	- 8,7
Exports <sup>(2)</sup>	5	6	13	18,4	116,7
Intra-Community trade <sup>(3)</sup>	114	157	164	11,3	4,5
Internal use	1222	1459	1461	5,2	0,1
Gross consumption (kg/head/year)	3,8	4,3	4,3	3,4	0,0
Self-sufficiency (%)	81,3	81,0	83,6	0,4	3,2

Source: Eurostat and EC Commission, Directorate-General for Agriculture.

<sup>(1)</sup> Carcass weight.

<sup>(2)</sup> Carcass weight — All trade with the exception of live animals.

<sup>(3)</sup> All trade in carcass weight, with the exception of live animals (figures based on imports).

**Pig numbers (December of previous year)**

	1 000 head			% of EUR 12	% TAV	
	» 1987 «	1991	1992	1992	» 1990 « » 1987 «	1992 1991
1	2	3	4	5	6	7
EUR 12	102071	100656	101349	100,0	- 0,3	0,7
Belgique/België	5989	6425	6501	6,4	1,8	1,2
Danmark	9192	9282	9767	9,6	0,2	5,2
BR Deutschland	23480	22035	21361	21,1	- 1,6	- 3,1
Ellada	1165	1143	974	1,0	- 0,5	- 14,8
España	16507	15949	17130	16,9	- 0,9	7,4
France	11895	12013	12063	11,9	0,2	0,4
Ireland	967	1069	1134	1,1	2,5	6,1
Italia	9340	8837	8549	8,4	- 1,4	- 3,3
Luxembourg	74	70	64	0,1	- 1,5	- 8,6
Nederland	14036	13788	13727	13,5	- 0,4	- 0,4
Portugal	2392	2664	2560	2,5	2,7	- 3,9
United Kingdom	7832	7380	7519	7,4	- 1,5	1,9

Source: Eurostat.

**Supply balance — pigmeat**

**EUR 12**

	1 000 t <sup>(1)</sup>			% TAV	
	» 1987 «	1990	1991	» 1990 « » 1987 «	1991 1990
1	2	3	4	5	6
Gross internal production	12869	13534	13434	1,7	- 0,7
Imports — Live animals	33,6	214,1	21,8	85,3	- 89,8
Exports — Live animals	1,0	18,2	8,8	166,0	- 51,6
Intra-Community trade	441	372	370	- 5,5	0,5
Net production	12836	13338	13421	1,3	0,6
Changes in stocks	10	24	- 9	36,2	- 137,5
Imports	84	52	78	- 14,7	50,0
Exports	440	679	580	15,6	14,6
Intra-Community trade	2101	2379	2548	4,2	7,1
Internal use	12510	12883	12932	1,0	0,4
Gross consumption in kg/head/year	38,7	39,3	39,5	0,5	0,5
Self-sufficiency (%)	102,6	103,5	103,8	0,3	0,3

Source: Eurostat.

(<sup>1</sup>) Carcass weight.

Number of utility chicks of table strains hatched

	1 000 head				% TAV	
	» 1987 «	1989	1990	1991	» 1990 « » 1987 «	1991 1990
1	2	3	4	5	6	7
EUR 12	3054790	3156483	3398164	3591732	3,7	5,7
BLEU/UEBL	91869	101590	109746	116991	6,1	6,6
Danmark	87458	96542	99457	104808	4,4	5,4
BR Deutschland	218993	231076	237439	269343	2,7	13,4
Ellada	68700	77169	78011	80315	4,3	3,0
España	498383	521769	522127	548846	1,9	5,1
France	658344	688247	804121	824012	6,9	2,5
Ireland	38326	37197	44109	48766	4,8	10,6
Italia	373922	406106	399571	413211	2,2	3,4
Nederland	300876	303358	323199	357632	2,4	10,7
Portugal	118109	104869	110558	178340	- 2,2	61,4
United Kingdom	599815	588950	669833	649378	3,7	- 3,1

Source: Eurostat.

Supply balance — poultrymeat

EUR 12

	1 000 t (1)				% TAV	
	» 1987 «	1989	1990	1991	» 1990 « » 1987 «	1991 1990
1	2	3	4	5	6	7
Gross internal production	5784	6108	6336	6722	3,1	6,1
Imports — live birds	3	1	3	3	0,0	0,0
Exports — live birds	7	4	3	3	- 24,6	0,0
Intra-Community trade	83	93	105	130	18,8	- 6,5
Net production	5780	6105	6336	6722	3,1	6,1
Changes in stocks	41	- 63	22	35	×	×
Imports	81	114	135	151	18,6	11,9
Exports	367	445	425	474	5,0	11,5
Intra-Community trade	467	573	678	782	13,2	15,3
Internal use (total)	5452	5837	6024	6364	3,4	5,6
Human consumption (kg/head/year)	16,8	18,0	18,6	18,2	3,5	- 2,2
Self-sufficiency (%)	106,1	104,6	105,2	105,6	- 0,3	0,4

Source: Eurostat.

(1) Slaughter weight.

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