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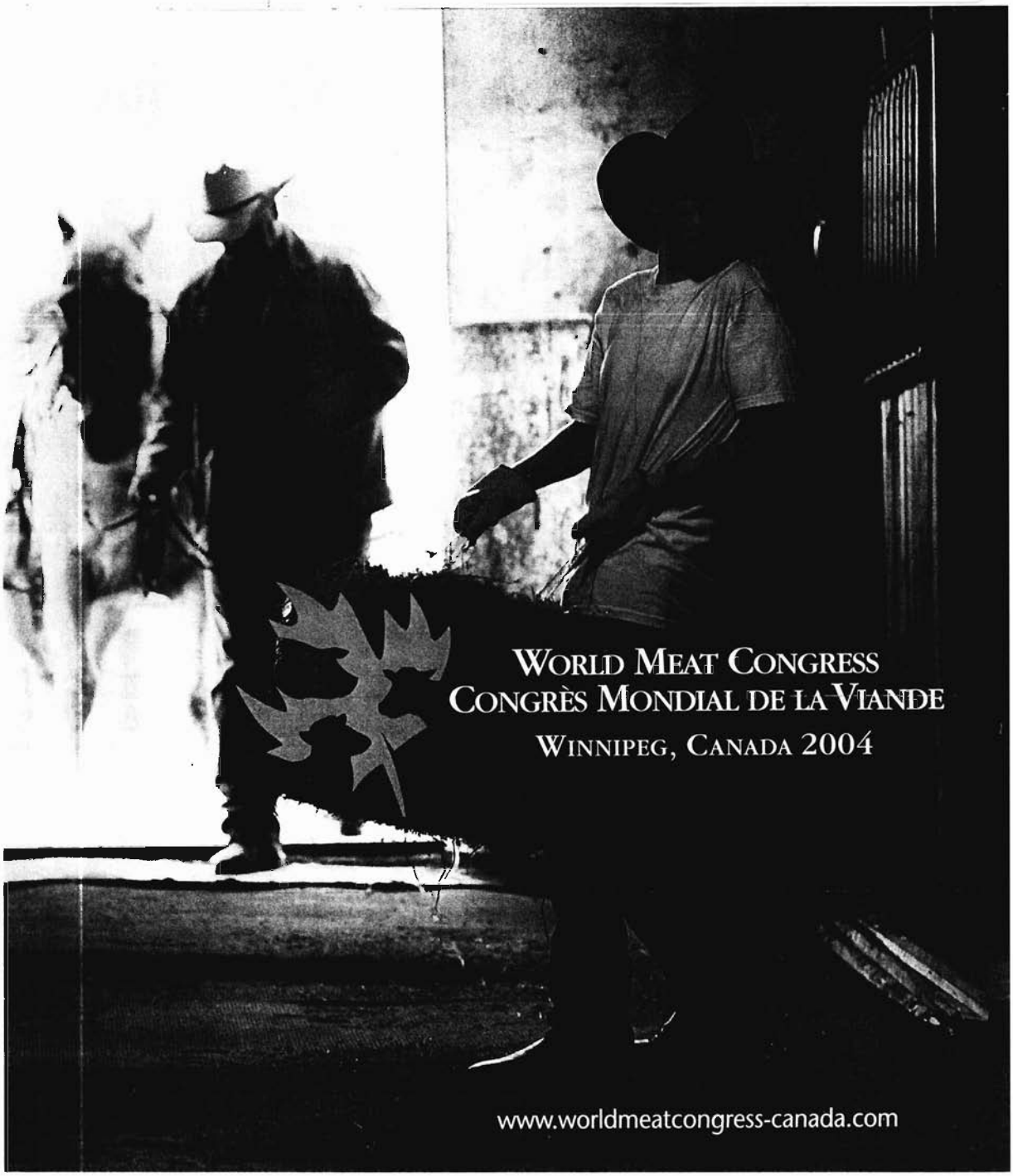
WORLD MEAT CONGRESS
CONGRÈS MONDIAL DE LA VIANDE
WINNIPEG, CANADA 2004
www.worldmeatcongress-canada.com

ANTECEDENTES PREPARADOS COMO ANEXO AL INFORME DE ASISTENCIA AL CONGRESO MUNDIAL DE CARNE 2004 (WINNIPEG, CANADA. JUNIO 2004)

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Depto. Producción Animal
INIA Carillanca

Temuco, Agosto 10 de 2004.

INTERNATIONAL MEAT SECRETARIAT

Report of IMS Beef Committee Meeting
Berlin, 27 May 2002

One hundred and twenty three delegates attended the meeting of the IMS Beef Committee, which was held on 27 May just prior to the fourteenth World Meat Congress in Berlin.

The report of the previous meeting held in Belo Horizonte on 18 September 2000 was approved.

Nancy Morgan, Meat Specialist with FAO gave an overview of the world beef situation, making particular reference to the drought conditions (especially in Australia) which were having the effect of bringing forward more cattle in the short term but which would have an effect on longer term availability. World prices had been generally weaker and declining in 2001/2002 , especially in South America, and this development could, in turn could lead to higher prices in 2003.

John Houston, retired vice-president of the National Cattlemen's Beef Association presented a paper on meat demand reporting principally on the IMS's third Marketing/Communications Workshop which was held in February 2002 in Houston, Texas. The workshop focussed on building the demand for red meat and looked at examples from USA, Australia, UK, Canada, France, Germany, New Zealand, and Ireland. The subject areas covered included communication on eating quality and consistency, competing with poultry meat, the marketing of 'value cuts', labelling, food safety, the challenge of vegetarianism, nutrition, and convenience.

Peter Hardwick, International Manager at MLC gave an update on the FMD and BSE situation in the UK and world-wide. On FMD he reported that UK had been declared FMD free by OIE in March 2002, there having been no cases since September 2001. With regard to BSE, the downward trend in UK continues and UK accounted for just under 50% of all cases in the EU in 2002. Looking at the global situation, he reported that cases were now being reported outside the EU both in Eastern Europe and notably in Japan.

Philip Seng, USMEF gave a short summary of the BSE situation in Japan, noting that the first cases had dealt a severe blow to consumer confidence and had also cast some doubt and suspicion on imports. There was concern over what route BSE had taken, as it did not appear to be clearly linked to the use of meat and bonemeal.

Dr. Klaus-Dieter Baehrfeld, Director of Artland Fleischwaren gave a brief overview of the importance of traceability in Germany and the automated systems in place to provide rapid and detailed information to buyers and consumers.

Nomination of a new Chairman. Owen Brooks was nominated as the new Chairman of the Beef Committee to be put forward for appointment by the General Assembly. (The appointment was subsequently confirmed by the General Assembly) Mr. Brooks took the opportunity to thank the outgoing Chairman, Arturo Llavallol for his enthusiasm and essential role in the success of the Committee.

Election of Vice-Chairman and Secretary. Roberto Vasquez Platero was elected Vice Chairman and Peter Hardwick was re-elected as Secretary.

Peter Hardwick
Secretary to the Beef Committee

Agenda of Beef Committee Meeting
Winnipeg Convention Centre
13.30 – 16.00 Monday 14 June 2004

Chairman : Owen Brooks, Bord Bia

1. Approval of Report of Meeting of 27 May 2002 in Berlin **2 minutes**

2. World Overview of Beef Situation, Nancy Morgan, Meat Specialist, FAO. **15 minutes**

3. WTO Update. Fiona Boal, Senior Manager, Food & Agribusiness Research, Rabobank Current position relating to beef. Likely shape of final outcome and obstacles to be overcome. **15 minutes**

4. Animal Diseases Overview
   (i) FMD – Roberto Vazquez Platero – Vice Chairman, Beef Committee **10 minutes**

   (ii) Proposal (attached) concerning the regionalisation of safeguard provisions with particular reference to Foot and Mouth Disease - Anne-Birgitte Lundholt, Managing Director of Danske–Slagterier. **10 minutes**

   (iii) BSE – Ted Haney, Canadian Beef Export Federation **10 minutes**

   Discussion **10 minutes**

5. Short term market prospects (Next 12-24 months. Key market developments, production, trade, consumption, policy.

EU	Jean-Luc Meriaux, UECBV	**10 minutes**
North America	Barry Carpenter, USDA	**10 minutes**
South America	Arturo Llavallol, Sociedad Rural	**10 minutes**
Africa	Ove Nielsen, Botswana Meat Commission	**10 minutes**
Asia/Pacific	Joel Haggard, USMEF	**10 minutes**
Oceania	Mark Spurr, MLA	**10 minutes**

7. Nomination of Chairman to be put forward for appointment by General Assembly (Chairman must be Member of IMS Board of Directors) **5 minutes**

8. Election of Vice-Chairman and election of Secretary. **5 minutes**

9. Chairman's Summing Up **3 minutes**

The Global Meat Economy: Outlook and Issues for the Beef and Pork Industries

World Meat Congress, Winnipeg, Canada, 14 June, 2004

Nancy Morgan, ESCB/FAO

The global livestock economy over the past decade has been characterized by one of the fastest consumption and trade growth of all major agricultural commodities. Growing numbers of quality-conscious urban consumers in developing countries have spurred global demand for meat and dairy products which, increasingly, has shifted from bulk meat trade to more specific value-added products and specialised cuts. Much of this demand has been met by increased output in developing countries themselves, where relatively low feed prices, technology transfers, and increasing vertical integration and concentration have combined to keep prices relatively low for consumers.

Among the major factors that have influenced the global livestock sector over the past few decades, the following were of particular relevance. Many of these factors are expected to continue to shape and influence markets over the next decade.

- Structural changes in the livestock industries, including improved genetics, animal housing, and enhanced management: In part these changes are a result of growing cross-border technology and investment flows into meat industries around the globe, particularly in strong growth markets or low-cost production regions. This trend is likely to continue in the future, leading to changing cost structures in industries in developing countries.
- Changes in policy environment: Implementation of WTO provisions for meat products have led to a reduction in the use of export subsidies and expanding access to various markets. These developments have stimulated trade flows and led to increasing participation of developing countries in international markets as exporters. Continued progress toward freer trade on international markets is projected over the next decade, assuming continuation of existing or announced national agricultural policies affecting these sectors.
- Increased instability in global meat markets as a result of animal disease outbreaks and escalating human health concerns related to BSE and antibiotics in feed. World-wide import bans on meat from infected areas and heightened border inspections and testing have had distorting effects on the patterns of livestock and meat trade, inducing trade diversion and shifting relative prices among meats. Human and animal health issues, as well as those related to product quality, are expected to increase in complexity over the next decade and influence consumption patterns.

This presentation will review the general trends underpinning growth in the global livestock sector, identify some of the factors affecting the global meat outlook for 2004, take a look at the issue of trade and animal diseases, and finally, summarize some of the challenges which face livestock producers, traders, researchers, consumers, and certainly policy makers.

The Livestock Revolution

The rapid growth in livestock production and trade over the past decade has been characterised as a revolution. Certainly growing incomes, urbanisation and changing life styles and consumption choices have prompted strong demand for meat products, mainly in developing countries. In fact, nearly three-quarters of the growth in global meat production and consumption over the past decade has been housed in developing countries. Consumer preferences and the changing cost structures of livestock production and processing industries have led to strong production gains for poultry and pork products, both of which are lower-priced than beef cuts. These changes in industry structure, lower prices and a evolving international policy environment which, through the World Trade Organisation (WTO), has increased market acccess, has led to a trade gains of over 7 percent annually in meat trade over the 1990s. Both health and economic factors, such as lower relative prices, have benefitted poultry share of global meat trade, which rose from 22 percent in 1990 to over 41 percent by 2003.

The total value of livestock and meat trade in 2002 is estimated at US$54 billion, or 12 percent of total agricultural trade. The Western Hemishere, exporting 10.4 million tonnes of meat products in 2002, accounted for over 50 percent of world meat trade. The total agregate value of meat and live animals from the region is estimated at US$ 13.5 billion and and US$ 2.6 billion respectively.

The list of major issues on concern to market participants in the livestock sector continues to grow as markets become more complex and integrated. Disease outbreak and food safety concerns predominant in 2004 but policy developments influence markets as do structural change/competitivenss in industries due to new technologies, improved management, environment regulations, animal welfare concerns. All of these, including policy developments/liberalisation prospects as a result of WTO and regional trade agreements, will influence long term market propsects for livestock market participants.

The Meat Outlook for 2004

Animal disease outbreak have been disrupting international markets periodically over the past three years. The impact of alternating disease outbreaks and recovery results in rapid increases in exportable meat supplies and considerably increase price volatility at international levels. In 2004, animal disease outbreaks are substantially affecting the outlook for the global meat market with approximately one-third of global meat exports, or 6 million tonnes, being presently affected by outbreaks of avian flu or by identified cases of BSE. While bans on imports may be temporary, global meat trade, originally forecast to rise in 2004, is likely to slide four percent. Import bans on poultry and beef exports from disease-affected markets are leading to higher international meat prices for product originated from disease-free zones as well as putting upward pressure on other animal protein product prices. Considerably trade diversion is expected to occur, with importers turning to disease-free meat suppliers, particularly those in Latin America and Oceania, to supply their markets.

The Beef Sector: Limited supplies and high prices depress bovine meat trade prospects

Global bovine meat production is forecast to reach 61.9 million tonnes in 2004, up marginally from the previous year. Low cattle inventories in Oceania, BSE concerns in North America, and reduced sector support in the EU are constraining slaughtering, leading to an expected 2 percent drop in bovine meat production in developed countries. By contrast, output in developing regions is anticipated to rise by 3 percent, with continued strong gains foreseen in China, India, the Republic of Korea, and Mexico. Per capita beef consumption in both developed and developing regions is set to drop by 1 percent to 22.7 and 6.4 kg/caput, respectively.

Higher prices and import bans on product originating from North America are expected to drop global beef trade by 8 percent to 5.6 million tons. North American exports, totalling 1.5 million tonnes in 2003 and valued at US$ 4 billion, are expected to plummet by 50 percent. While exports from Canada will recover as the US lifts import restrictions on Canadian product, US exports are estimated to decline 82 percent. Meanwhile, as demand for beef from disease-free suppliers surges, shipments from South America might expand by 17 percent, with Brazil's share of global beef shipments rising to 22 percent. However, the gap left by beef trade restrictions on North American product is unlikely to be filled by product from South American or Oceania. Consequently, purchases by the major importing countries of Japan, Mexico, and the Republic of Korea are projected to fall by 35 percent, 30 percent, and 40 percent respectively. While Indian beef exports are likely to rise 14 percent, a marginal decline in Australian shipments is anticipated, on account of limited inventories and an appreciating currency. Meanwhile, the EU is set to register their second year as a net beef importer as exports decline for the fifth consecutive year.

The Pigmeat Sector: Despite limited pigmeat output gains and higher prices, trade expected to expand

Low returns to hog producers in the context of higher feed prices in 2004 are expected to limit pigmeat output to 97.7 million tones, up less than 2 percent from 2003. In many countries, production costs are exceeding market prices as international maize and soybean meal prices have soared 20 percent and 65 percent respectively compared with last year. Lower profitability facing many of the producers in Europe and Brazil, combined with reduced prospects for imports by Russia, are dampening major

exporters' production outlook. By contrast, in the United States, output is expected to rise by 3 percent supported by strong consumer demand. US producer and retail pigmeat prices remain unusually high given the glut of meat available in the context of export restrictions facing the beef and poultry sector. Overall, however, developed countries are set to experience a slight decline in pigmeat production this year. Meanwhile in Asia, which accounts for 56 percent of global output, and where the AI has bolstered pigmeat prices, output is set to increase by 3 percent. While per capita consumption is moving up in Asia and developing countries by 2 percent in 2004 to nearly 15.0 kg/caput and 11.8 respectively, it remains significantly below the level in developed countries, where consumption is expected to drop 1 percent to 29.2 kg/caput.

Trade prospects for pigmeat in 2004 are stronger than for poultry and bovine meats, with exports estimated at 4.3 million tonnes, or 2 percent higher than last year. Much of the increase is expected to be sourced in North America, which typically exports high valued cuts to lucrative Asian markets. Shipments by other traditional exporters are expected to hampered by trade restrictions in Russia, which was the world's largest meat importer until its imposition of tariff rate quotas in 2003. Limited access to the Russian market, where imports are forecast down 12 percent, is set to reduce Brazilian shipments by 40 percent while the elimination of EU export subsidies early this year is forecast to reduce EC exports by 4 percent. By contrast, shipments from Mexico and Chile are anticipated to rise as a result of a trade agreement with Japan where strong consumer demand is bringing about an estimated 12 percent rise in imports, a new record. This is despite expectations that the strong import pace might retrigger the pigmeat safeguard, leading to higher tariffs in August.

Meat Price Implications: International meat prices are surging in 2004, as animal disease outbreaks in major meat exporting countries and bans on imports from disease afflicted areas are reducing exportable supplies. Expectations of higher prices for meat from disease-free zones in 2004 come on the heels of rising prices during the previous year. In 2003, the FAO trade-weighted meat price index rose 16 percent, as limited meat production gains lifted price by 42 percent for poultry, 19 percent for beef and 8 percent for pigmeat.

Policy Issues of Concern in 2004:

The accession of 10 new countries into the EU raises a element of uncertainty into the outlook. It is generally felt, however, that accession will only have a limited impact on global meat trade flows. Certainly, accession offers an opportunity to all countries involved to increase trade. The immediate impact will be likely increased product flow, both pork and high quality beef cuts, moving into the acceeding countries. Similar to the US and Canada, hogs may move from Poland and other countries into Germany, be slaughtered and exported back as products. In the long term, increased investment flows into Eastern European countries and improved hygiene standards in existing plants will generate a more equitably flow of trade.

Trade policy developments in 2004 included reduced its use of export subsidies by the EU for both pork and beef, the continuation of restrictive TRQs in Russia, and in Japan, a reduction in the beef tariffs in April and the elimination of the pork safeguard. However, the safeguard may be reimposed by August due to the strong pace of imports. Protection for livestock industries in OECD continues to be high. OECD figures indicate that support for all agricultural products in 2003 is estimated at US$312 billion, this compares to US$637 billion total value of agricultural production. Estimated support to the livestock sector (excluding wool) is 104 billion, or 16 percent of the total support. The estimates for the various meats are:

Beef/Veal: 34 billion (32 percent of total support)

Sheepmeat: 5 billion (.5 percent of total support)

Pigmeat: 11 billion (10 percent of total support)

Poultry: 7 billion (7 percent of total support).

Meat Trade and Animal Diseases

Animal disease outbreaks hold high costs for economies around the globe, result in considerable market disruptions and price volatity as countries import barriers to trade and raise concern about increased cross-boundary risks of disease transmission and effective disease control.

A recent study by FAO measured the costs of selected disease outbreaks[1]. These ranged from US$ 9.2 billion for the FMD outbreak in the UK in 2001 to US$ 6.6 billion for the FMD outbreak in Taiwan in 1997. The latter case led to significant and permanent changes in the pattern of trade, with the Republic of Korea replacing Taiwan as the major supplier of pork to Japan. The FMD outbreak in the Republic of Korea in 2000 then resulted in other suppliers filling the vacuum. Obviously FMD outbreaks were not limited to the EU in 2001; the South America countries of Argentina and Uruguay lost considerable export earnings, estimated at US$ 440 million for Argentina and US$ 178 million. These direct trade losses do not include the costs of public disease control measures, losses to producers and consumers through destabilized markets and fluctuating prices, and the general costs to the industry.

The increasing prevalence of policy measures imposed to ensure human and animal health are revealed by a proliferation since 1995 of notifications to the SPS committee at the WTO. Meat notifications have been rising quickly and constituted about 30 percent of total notifications. A preliminary assessment of notifications to the WTO in the first four months of 2004 reveal that the notifications have already surpassed 200, and accounted for more than 60 percent of total notifications. Certain, they are on track to considerably exceed the record level of 250 received in 2001. To-date, since 1995, out of the more than 4,700 notifications submitted to the SPS committee, 1,371 related to meat products.

The Challenges:

The complexity of the global trading system of meat products is expected to increase further in response to consumers' preoccupation about the ways in which meat is produced and sold. While long term prospects for meat industries are robust with meat demand expected to witness gains high than most other agricultural commodities, annual consumption gains are projected to slow to 2.2 percent annually through 2010. Similarly, growth in meat trade is expected to slow to 2.4 percent annually from the 7 percent gains witnessed over the 1990s. Trade growth for all meats is expected to range between 2.4-3.1 percent over the time period.

However, increased trade in meat product and greater intensification of production systems increase the risk of interantional spread of animal diseases, zoonose and food-borne infections. With greater scrutiny of meat production systems and the "hoof to plate" approach to food safety and quality, there is a risk of proliferation of divergent food standards, sanitary assurances and certification procedures. In addition, social concerns related to the environmental impact of intensive livestock production systems and the way of treating, raising livestock (animal welfare) will result in increasing legislation affecting the cost structure of industries.

It is increasingly clear that product quality and safety are passwords to success. In this increasingly complex marketplace, transparency, appropriate legislation, and greater collaboration between producers, consumers, policy makers, and international organisations is critical to enhancing participation in global livestock and meat markets.

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[1] See FAO website for 2002 IGG document entitled "Animal Diseases: Implications for International Meat Trade" on http://www.fao.org/Unfao/bodies/ccp/me/02/.

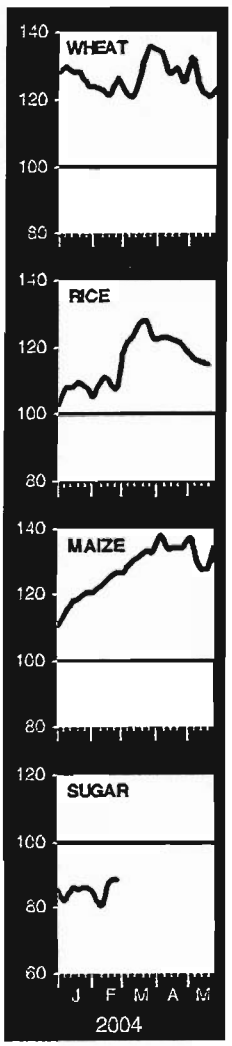
global information and early warning system on food and agriculture

food outlook

No. 2 June 2004

highlights

EXPORT PRICES
(July 2003=100)



FAO's latest forecast of global cereal production in 2004 is 1 956 million tonnes, a substantial increase from the previous year. However, despite a modest expected rise in utilization, the new 2004/05 marketing season may lead to a fifth consecutive annual drawdown of global cereal stocks.

FAO's first forecast of global cereal trade in 2004/05 stands at 229.7 million tonnes, 3 percent down from the previous year. The decline mostly reflects, good crop prospects in traditional importing countries, as well as a strong production recovery in Europe. In the case of rice, trade is also expected to be limited by tight supplies in major exporting countries.

After rising for several months, international prices of most cereals eased back somewhat in recent weeks reflecting generally favourable prospects for the 2004 crops and, for rice, also the release of government stocks onto domestic markets in China and Thailand.

Global cassava production is forecast to expand in 2004, alongside a sharp increase in trade. A tightening of feed grain supplies in China could stimulate cassava imports to the country and could further strengthen international prices.

International meat prices are surging in 2004 as animal disease outbreaks in major meat exporting countries and resulting bans on imports from these areas are reducing exportable supplies.

International prices for dairy products were well above average during the first-half of 2004, as a result of sustained import demand and limited availability of export supplies. For the remainder of the year, prices are expected to remain at or near their current high levels.

International prices in the oilcrop complex have continued to rise strongly in the past few months, being strongly influenced by tight soybean supplies and by slower growth in palm oil production.

World pulse production is forecast to reach a record 60 million tonnes in 2004, which could lead to increased consumption and trade during the year.

FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

Meat and Meat Products

Meat and meat product prices continue to rise

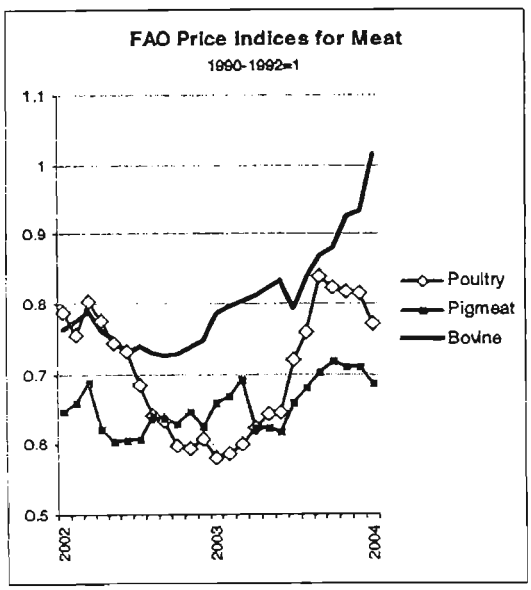
International meat prices are surging in 2004, as animal disease outbreaks in major meat exporting countries and bans on imports from disease afflicted areas are reducing exportable supplies. Expectations of higher international prices for meat came on the heels of rising prices in the previous year. In 2003, the FAO trade-weighted meat price index rose already by 16 percent, as limited meat production gains lifted prices by 42 percent for poultry, 19 percent for beef and 8 percent for pigmeat.

Animal diseases, rising feed prices and considerable uncertainty about consumer demand for meat products are slowing the expansion in global meat output in 2004. Production is expected to rise by 1 percent to 253.6 million tonnes, one of the slowest growths registered in FAO's database. Meat markets have been disrupted by the impact of the avian influenza (AI) which led to increased poultry mortality/culling throughout Asia and parts of North America, and the finding of Bovine Spongiform Encephalopathy (BSE) in North America. In Asia, meat output is expected to increase less than 2 percent, half the average rate of the past five years. Output gains in developed countries are expected to remain stable with a slight increase in North America offset by a decline in Europe. At the world level, per caput meat consumption is expected to remain at 39.9 kg/caput, constrained by high overall meat prices and consumer concerns about the safety of eating poultry, particularly in Asia.

Import bans on meat produced in disease-afflicted countries in early 2004 affected approximately one-third of global meat exports, or 6 million tonnes. While the bans have been temporary, global meat trade, originally forecast to rise in 2004, is now anticipated to slide by 4 percent to 18.4 million tonnes. If confirmed, this would be the first drop in meat trade since the mid-1980s. Over the past four years, alternating disease outbreaks and recoveries have resulted in rapid shortages/increases in exportable meat supplies and considerable international meat price variability. The resulting shift in trading patterns is expected to favour those disease-free meat suppliers in Latin America and Oceania. Exports from Oceania, however, are likely to be constrained in 2004 by low animal inventories and stronger currencies in the region. By contrast, meat exports from South America, which have surged over the past three years, might increase further by about 6 percent in 2004, taking the region's share of meat exports to 27 percent, up from just 16 percent in the early 1990's. Moving into the position as the world's largest meat exporter, Brazil is expected to ship over 3.8 million tonnes of meat in 2004, or 21 percent of global trade.

Limited supplies and high prices depress bovine meat trade prospects

Global bovine meat production is forecast to reach 61.9 million tonnes in 2004, up marginally from the previous year. Low cattle inventories in Oceania, BSE concerns in North America and reduced sector support in the EU are constraining slaughtering, leading to an expected 2 percent drop in bovine meat production in developed countries. By contrast, output in developing regions is anticipated to rise by 3 percent, with continued strong gains foreseen in China, India, the Republic of Korea and Mexico. Per caput beef consumption is set to drop by 1 percent in both developed and developing regions to 22.7 and 6.4 kg/caput, respectively.



Higher prices and import bans on products originating from North America are expected to reduce global beef trade by 8 percent to 5.6 million tonnes. North American exports, totalling 1.5 million tonnes in 2003 and valued at US$4 billion, are expected to plummet by 50 percent. While exports from Canada will recover as the United States lifts import restrictions on Canadian products, United States exports are estimated to decline by 82 percent. As demand for beef from disease-free suppliers surges, shipments from South America might expand by 17 percent, with Brazil's share of global beef shipments rising to 22 percent. However, the gap left by beef trade restrictions on North American products is unlikely to be entirely filled by South American or Oceania. Consequently, purchases by the major importing countries of Japan, Mexico, and the Republic of Korea are projected to fall by 35 percent, 30 percent, and 40 percent respectively. While Indian beef exports are likely to rise by 14 percent, a marginal decline in Australian shipments is anticipated, on account of limited inventories and an appreciating currency. The EU is set to register their second year as a net beef importer as exports decline for the fifth consecutive year.

World Meat Statistics[1/]

	2002	2003 estimate	2004 prelim.
	(. . . . million tonnes . . . .)		
PRODUCTION	**246.3**	**250.4**	**253.6**
Poultry meat	74.6	76.1	77.1
Pig meat	94.2	96.2	97.7
Bovine meat	61.3	61.7	61.9
Sheep & goat meat	11.8	12.0	12.4
Other meat	4.5	4.5	4.5
EXPORTS[2/]	**18.6**	**19.1**	**18.4**
Poultry meat	7.8	7.9	7.6
Pig meat	3.8	4.2	4.3
Bovine meat	5.9	6.1	5.6
Sheep & goat meat	0.7	0.7	0.7
Other meat	0.3	0.3	0.3
PER CAPITA CONSUMPTION	**39.8**	**39.9**	**39.9**
Poultry meat	12.0	12.1	12.2
Pig meat	15.2	15.3	15.4
Bovine meat	9.9	9.9	9.7
Sheep & goat meat	1.9	1.9	2.0
Other meat	0.7	0.7	0.7

Source: FAO Note: Total computed from unrounded data.
1/ For more detailed meat statistics, go to the following web site: http:/www.fao.org/es/ESC/en/20953/21014/index.html
2/ Includes meat (fresh, chilled, frozen prepared and canned) in carcass weight equivalent; excludes live animals, offals and EC (15) intra-trade.

Poultry output edges up but Avian Influenza (AI) cuts into trade prospects

Rising feed prices, AI induced bird mortality and slaughter, combined with consumer responses to the spread of AI is leading to a second year of slow growth in poultry meat output. Production in 2004 is forecast at 77.1 million tonnes, implying an increase of just 1 percent from the previous year, well below the average 5 percent growth of the past five years. Beset by AI outbreaks in early 2004, Asian poultry output is set to drop by 2 percent as disease-afflicted countries, i.e. Thailand, Viet Nam, Japan, the Republic of Korea, and Indonesia, among others, are estimated to have culled over 100 million birds. Recovery in many of these Asian countries, including those not affected by the disease, is constrained by lower prices in the wake of shaken consumer confidence in poultry and rising feed costs. Per caput consumption in the developing countries is forecast to decrease slightly to 8.2 kg/caput, mostly due to an estimated 2-percent decline in Asia. At the global level, per caput consumption, which grew 3 percent annually over the past five years, is expected to remain stable at 12 kg/caput.

Import bans on products originating from the 12 Asian and North American countries that were affected early in 2004 by AI are reducing supplies in world markets and causing international prices to rise. As a result, global trade in poultry products in 2004 is anticipated to contract by 4 percent to 7.6 million tonnes. Led by lower exports from the United States, developed country exports are expected to witness a third year of consecutive decline, sliding 5 percent to an estimated 3.8 million tonnes. Disease outbreaks are restricting Asian poultry exports, supplied by mainly Thailand and China, with shipments from the region forecast to be down by 21 percent. Non-traditional exporters in Asia, such as India, Malaysia, and the Philippines are increasing their exports while exports from Brazil, which have registered double-digit gains over the past 7 years, are expected to rise by a further 10 percent. High prices and consumer concerns are expected to reduce imports by major importers in Asia while trade barriers in the Russian Federation, will cause a further contraction in their imports.

Despite limited pigmeat output gains and higher prices, trade could expand

Low returns to hog producers in the context of higher feed prices are expected to limit growth in global pigmeat production to less than 2 percent in 2004, taking output to 97.7 million tonnes. In many countries, production costs are exceeding market prices as international maize and soybean meal prices have soared 20 percent and 65 percent respectively compared with last year. Lower profitability facing many of the producers in Europe and Brazil, combined with reduced prospects for exports to the Russian Federation, are negatively affecting the production outlook. Developed countries are set to experience a slight decline in output. This is despite, in the United States, a projected rise in output by 3 percent supported by strong consumer demand. In Asia, which accounts for 56 percent of global output, and where AI has bolstered pigmeat prices, output is set to increase by 3 percent. While per caput consumption is moving up in Asia and developing countries by 2 percent in 2004 to nearly 15 kg/caput and 11.8 kg/caput respectively, it remains significantly below the level of 29.2 kg/caput in developed countries.

Trade prospects for pigmeat in 2004 are stronger than for poultry and bovine meats, with exports estimated at 4.3 million tonnes, or 2 percent higher than last year. Much of the increase is expected to be sourced in North America, which typically exports high valued cuts to lucrative Asian markets. Shipments by other traditional exporters are expected to be hampered by trade restrictions in the Russian Federation, which was the world's

largest meat importer until its imposition of tariff rate quotas in 2003. Limited access to the Russian Federation market, where imports are forecast to be down by 12 percent, is set to reduce Brazilian shipments by 40 percent while the elimination of EU export subsidies early this year is forecast to reduce EU exports by 4 percent. By contrast, shipments from Mexico and Chile are anticipated to rise as a result of a trade agreement with Japan where strong consumer demand is bringing about an estimated 12 percent rise in imports, to a new record level. This is despite expectations that the strong import pace might retrigger the pigmeat safeguard, leading to higher tariffs in August.

Output and trade gains for ovine meat to exceed that of other meats

Global ovine meat production is expected to increase by 3 percent in 2004 to 12.4 million tonnes. Growth in Asia, which accounts for more than half of global production, is expected to rise 4 percent, supported by rising output in China. Despite a steady decline in United States output, growth in developed countries should be supported by a recovery of production in Australia, the EU and New Zealand. Global per caput consumption is forecast up 2 percent to 2 kg/caput.

A recovery in drought-affected exportable supplies from Australia and strong supply availability in New Zealand is leading to an estimated 3 percent increase in trade to 696 000 tonnes. Shipments from Oceania, which comprise 90 percent of global exports, are stimulated by higher import demand from the EU, North America, and Mexico.

BOVINE MEAT: PRODUCTION (000 mt - CWE)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
WORLD	46,696	59,858	59,205	61,284	61,687	61,886	100.0	100.0	100.0	100.0	100.0	100.0
Developed countries	23,625	30,063	29,515	30,197	29,728	29,088	50.6	50.2	49.9	49.3	48.2	47.0
Developing countries	23,071	29,795	29,690	31,087	31,959	32,810	49.4	49.8	50.1	50.7	51.8	53.0
UNITED STATES	10,584	12,296	11,963	12,427	12,042	11,510	22.7	20.5	20.2	20.3	19.5	18.6
EU (15)	0	7,437	7,363	7,541	7,440	7,290	0.0	12.4	12.4	12.3	12.1	11.8
BRAZIL	4,807	6,540	6,671	7,136	7,385	7,570	10.3	10.9	11.3	11.6	12.0	12.2
CHINA (MAINLAND)	2,336	5,328	5,468	5,846	6,130	6,500	5.0	8.9	9.3	9.5	9.9	10.5
C.I.S (12)	6,543	3,886	3,763	3,477	4,034	3,919	14.0	6.5	6.4	6.5	6.5	6.3
INDIA	2,632	2,863	2,881	2,906	2,961	3,060	5.6	4.8	4.9	4.7	4.8	4.9
ARGENTINA	2,806	2,718	2,452	2,700	2,800	2,850	6.0	4.5	4.1	4.4	4.5	4.3
AUSTRALIA	1,826	1,968	2,119	2,028	1,835	1,900	3.9	3.3	3.6	3.3	3.1	3.1
MEXICO	1,256	1,408	1,445	1,451	1,462	1,520	2.7	2.4	2.4	2.4	2.4	2.5
CANADA	860	1,264	1,250	1,272	1,245	1,450	1.8	2.1	2.1	2.1	2.0	2.3
OTHERS	13,044	14,125	13,792	14,000	14,262	14,529	27.9	23.6	23.3	22.8	23.1	23.5

BOVINE MEAT: IMPORT (000 mt - CWE)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
WORLD (excl. EU I-t)	4,665.2	5,475.0	5,430.5	5,833.9	5,956.4	5,485.7	100.0	100.0	100.0	100.0	100.0	100.0
Developed countries	3,377.4	3,547.1	3,715.0	3,720.5	3,754.9	3,622.9	72.4	64.8	68.4	63.8	62.8	65.9
Developing countries	1,287.9	1,926.0	1,715.5	2,113.5	2,229.5	1,872.7	27.8	35.2	31.6	36.2	37.2	34.1
UNITED STATES	1,006.0	1,306.1	1,352.5	1,376.5	1,281.0	1,412.0	21.6	23.9	24.9	23.6	21.4	25.7
C.I.S (12)	775.8	389.2	576.2	661.0	657.2	698.3	16.6	7.1	10.6	11.3	11.0	12.7
JAPAN	708.7	964.3	905.8	851.5	772.0	500.0	15.1	17.6	16.7	11.2	12.9	9.1
MEXICO	121.3	392.8	390.0	458.2	425.0	300.0	2.6	7.2	7.3	7.9	7.1	5.5
EU (15) (excl. intra-trade)	390.1	383.0	353.0	451.3	470.0	500.0	8.4	7.0	6.5	7.7	7.9	9.1
KOREA, REP.	131.3	277.2	209.6	370.6	367.0	220.0	2.8	5.1	3.9	6.4	6.1	4.0
CANADA	261.1	263.6	299.9	307.7	260.0	200.0	5.6	4.8	5.5	5.3	4.7	3.6
EGYPT	138.0	199.2	97.6	142.3	130.0	130.0	3.0	3.6	1.8	2.4	2.2	2.4
CHILE	45.7	121.0	115.0	132.8	170.0	180.0	1.0	2.2	2.1	2.3	2.8	3.3
MALAYSIA	67.1	120.7	122.5	127.3	135.0	140.0	1.4	2.2	2.3	2.2	2.3	2.5
OTHERS	1,022.5	1,055.8	999.4	1,159.6	1,299.2	1,215.4	21.9	19.3	18.4	19.9	21.7	22.1

BOVINE MEAT: EXPORT (000 mt - CWE)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
WORLD (excl. EU I-t)	4,776.5	5,728.4	5,536.9	5,947.8	6,062.3	5,809.0	100.0	100.0	100.0	100.0	100.0	100.0
Developed countries	3,654.0	4,218.2	4,085.3	4,139.2	3,767.3	3,000.6	76.5	73.6	73.8	69.6	62.5	53.5
Developing countries	1,122.5	1,510.1	1,451.6	1,808.5	2,275.0	2,808.4	23.5	26.4	26.2	30.4	37.5	46.5
AUSTRALIA	1,056.5	1,266.0	1,265.5	1,256.6	1,130.0	1,128.0	22.2	21.1	22.9	20.8	18.8	20.1
UNITED STATES	541.3	1,165.2	1,010.8	1,071.8	1,105.0	204.0	11.3	20.3	18.3	18.0	18.2	3.6
BRAZIL	302.8	410.8	845.0	757.8	1,050.0	1,230.0	6.3	7.2	11.7	12.7	17.3	21.9
CANADA	185.5	491.8	542.3	578.5	375.0	550.0	3.9	8.6	9.8	9.7	6.2	9.8
EU (15) (excl. intra-trade)	1,064.8	622.8	547.0	490.7	360.0	310.0	22.3	10.9	9.9	8.1	6.3	5.5
NEW ZEALAND	395.0	457.2	448.1	441.4	480.0	480.0	8.3	8.0	8.1	7.4	7.9	8.7
INDIA	101.8	288.2	243.8	288.8	350.0	400.0	2.1	5.0	4.4	5.0	5.8	7.1
ARGENTINA	213.8	301.8	134.8	296.5	320.0	360.0	4.5	5.3	2.4	5.0	5.3	6.4
URUGUAY	81.8	223.8	141.0	264.8	265.0	295.0	1.7	3.9	2.5	3.4	4.4	5.3
C.I.S (12)	233.0	190.4	157.1	190.5	212.6	218.8	4.9	3.2	2.8	3.2	3.5	3.8
OTHERS	596.5	378.9	400.8	369.8	394.7	423.4	12.5	6.6	7.2	6.6	6.5	7.5

BOVINE MEAT : APPAR. CONSUMPT. (000 mt - CWE)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
WORLD	46,620	59,975	58,903	61,201	61,813	61,786	100.0	100.0	100.0	100.0	100.0	100.0
Developed countries	23,362	29,737	28,834	29,983	30,010	29,765	50.2	49.6	49.0	48.8	48.5	48.2
Developing countries	23,239	30,238	30,067	31,338	31,803	32,021	49.8	50.4	51.0	51.2	51.5	51.8
UNITED STATES	11,152	12,369	12,266	12,688	12,296	12,715	23.9	20.7	20.9	20.7	19.9	20.6
EU (15)	-718	7,578	6,940	7,557	7,720	7,484	-1.5	12.6	11.8	12.3	12.5	12.1
BRAZIL	4,534	6,179	6,073	6,444	6,395	6,405	9.7	10.3	10.3	10.5	10.3	10.4
CHINA (MAINLAND)	2,188	5,291	5,441	5,822	6,111	6,469	4.7	8.8	9.2	9.5	9.9	10.5
C.I.S (12)	7,120	4,118	4,186	4,457	4,479	4,369	15.3	6.9	7.1	7.3	7.2	7.1
INDIA	2,531	2,575	2,637	2,698	2,812	2,960	5.4	4.3	4.5	4.3	4.2	4.3
ARGENTINA	2,602	2,431	2,357	2,411	2,492	2,300	5.6	4.1	4.0	3.9	4.0	3.7
MEXICO	1,377	1,791	1,833	1,901	1,885	1,810	3.0	3.0	3.1	3.1	3.0	2.9
JAPAN	1,308	1,482	1,322	1,256	1,328	972	2.8	2.5	2.2	2.1	2.1	1.6
CANADA	945	1,042	1,001	1,008	1,138	1,110	2.0	1.7	1.7	1.6	1.8	1.8
OTHERS	13,565	15,099	14,825	15,050	15,477	15,452	29.1	25.2	25.2	24.6	25.0	25.0

BOVINE MEAT : P/C CONSUMPT. (Kg / head -)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
							Bov.Meat P/C Cons. as a % of Tot.Meat P/C Consump.					
WORLD	8.5	9.5	9.6	9.9	9.9	9.7	29.6	25.7	24.8	24.8	24.7	24.4
Developed countries	18.5	23.0	22.2	22.8	23.0	22.7	35.9	29.0	27.7	27.8	27.9	27.5
Developing countries	5.5	6.4	6.2	6.4	6.4	6.3	25.2	23.1	22.5	22.5	22.3	22.0
ARGENTINA	76.8	65.7	62.9	63.5	64.9	59.2						
URUGUAY	64.1	77.8	52.4	62.6	52.5	49.2						
UNITED STATES	42.6	44.5	43.5	44.9	43.2	44.4						
AUSTRALIA	44.0	41.0	44.9	39.7	41.7	42.1						
NEW ZEALAND	61.2	39.6	46.0	38.5	47.1	43.5						
BRAZIL	29.3	36.3	35.3	37.0	36.2	35.9						
PARAGUAY	42.1	34.4	34.2	34.7	32.0	27.2						
CANADA	32.7	33.5	31.9	31.8	35.8	34.4						
SWAZILAND	24.6	15.7	20.9	21.7	22.8	22.8						
CHILE	19.6	22.8	21.8	21.3	22.7	23.2						
EU (15)	-1.9	20.2	18.5	20.1	20.5	19.9						

OVINE MEAT: PRODUCTION (000 mt - CWE)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
WORLD	8,796	11,312	11,437	11,767	12,017	12,399	100.0	100.0	100.0	100.0	100.0	100.0
Developed countries	2,665	3,348	3,277	3,217	3,194	3,249	30.3	29.6	28.6	27.3	26.6	26.2
Developing countries	6,131	7,964	8,160	8,550	8,823	9,150	69.7	70.4	71.4	72.7	73.4	73.8
CHINA (MAINLAND)	1,373	2,740	2,927	3,167	3,400	3,640	15.6	24.2	25.6	26.9	28.3	29.4
EU (15)	0	1,139	1,023	1,063	1,076	1,085	0.0	10.1	8.9	9.0	9.0	8.8
INDIA	635	696	699	703	707	710	7.2	6.2	6.1	6.0	5.9	5.7
AUSTRALIA	655	691	726	656	680	570	7.4	6.1	6.3	5.6	4.7	4.6
PAKISTAN	595	606	620	632	547	560	6.8	4.5	4.6	4.5	4.6	4.5
NEW ZEALAND	488	634	564	523	549	570	5.5	4.7	4.9	4.4	4.6	4.6
C.I.S (12)	935	509	500	511	515	522	10.6	4.5	4.4	4.3	4.3	4.2
IRAN ISLAMIC REP.	368	436	444	450	455	460	4.2	3.9	3.9	3.8	3.8	3.7
TURKEY	363	374	351	333	325	320	4.1	3.3	3.1	2.8	2.7	2.6
SUDAN	179	261	262	263	265	279	2.0	2.3	2.3	2.2	2.2	2.2
OTHERS	3,206	3,426	3,420	3,579	3,618	3,683	36.5	30.3	29.9	30.4	30.1	29.7

OVINE MEAT: IMPORT (000 mt - CWE)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
WORLD (excl. EC I.-t.)	621.2	721.9	689.0	696.6	711.9	742.9	100.0	100.0	100.0	100.0	100.0	100.0
Developed countries	334.2	401.0	386.2	376.1	375.1	384.3	53.8	55.6	56.0	54.6	52.7	51.7
Developing countries	287.0	320.8	302.9	311.6	336.9	358.6	46.2	44.4	44.0	45.4	47.3	48.3
EU (15) (excl. intra-trade)	198.6	222.0	222.4	223.6	226.0	230.0	32.0	30.8	32.3	32.6	31.7	31.0
UNITED STATES	24.3	60.4	66.8	74.1	78.0	80.0	3.9	8.4	9.7	10.8	11.0	10.8
MEXICO	21.0	44.7	48.9	47.0	55.0	60.0	3.4	6.2	7.1	6.8	7.7	8.1
SAUDI ARABIA	32.9	57.2	45.3	47.0	47.0	47.0	5.3	7.9	6.6	6.8	6.6	6.3
PAPUA NEW GUINEA	41.0	35.7	29.3	21.5	25.0	30.0	6.6	4.9	4.3	3.1	3.5	4.0
JAPAN	56.3	27.2	26.8	26.0	20.0	20.0	9.1	3.8	3.9	3.6	2.8	2.7
CHINA (TAIWAN PROV.)	15.3	21.6	21.8	27.3	30.0	30.0	2.5	3.0	3.2	4.0	4.2	4.0
CANADA	13.1	16.3	17.2	17.0	17.0	17.0	2.1	2.3	2.5	2.5	2.4	2.3
SOUTH AFRICA	5.9	53.2	34.2	16.4	13.0	15.0	0.9	7.4	5.0	2.2	1.8	2.0
UNIT. ARAB EMIR.	20.9	16.4	14.9	21.3	23.0	25.0	3.4	2.3	2.2	3.1	3.2	3.4
OTHERS	191.7	167.3	161.5	167.7	177.9	188.9	30.9	23.2	23.4	24.4	25.0	25.4

OVINE MEAT: EXPORT (000 mt - CWE)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
WORLD (excl. EC I.-t.)	677.3	765.3	715.5	699.3	677.2	696.1	100.0	100.0	100.0	100.0	100.0	100.0
Developed countries	612.0	710.0	675.5	657.2	625.8	642.2	90.4	92.8	94.4	94.0	92.4	92.3
Developing countries	65.3	55.3	40.3	42.0	51.4	53.9	9.6	7.2	5.6	6.0	7.6	7.7
NEW ZEALAND	359.1	380.1	346.4	341.7	356.0	370.0	53.0	49.7	48.4	48.8	52.6	53.2
AUSTRALIA	221.2	310.7	306.5	294.6	250.0	252.0	32.7	40.6	42.8	42.1	36.9	36.2
URUGUAY	10.9	16.6	9.0	6.8	6.5	7.2	1.6	2.2	1.3	0.8	1.0	1.0
INDIA	11.0	11.9	3.5	6.0	6.0	7.0	1.6	1.6	0.5	0.7	0.9	1.0
OTHERS	75.0	46.1	50.3	52.2	58.7	59.9	11.1	6.0	7.0	7.5	8.7	8.6

OVINE MEAT : APPAR. CONSUMPT. (000 mt - CWE)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
WORLD	8,750	11,263	11,427	11,754	12,057	12,446	100.0	100.0	100.0	100.0	100.0	100.0
Developed countries	2,390	3,034	3,004	2,936	2,948	2,991	27.3	26.9	26.3	25.0	24.4	24.0
Developing countries	6,360	8,229	8,423	8,818	9,109	9,455	72.7	73.1	73.7	75.0	75.6	76.0
CHINA (MAINLAND)	1,371	2,754	2,950	3,199	3,428	3,685	15.7	24.4	25.8	27.2	28.4	29.4
EU (15)	195	1,357	1,242	1,273	1,300	1,313	2.2	12.0	10.9	10.8	10.8	10.5
INDIA	624	684	696	698	701	703	7.1	6.1	6.1	5.9	5.8	5.6
PAKISTAN	595	603	619	631	546	559	6.8	4.5	4.5	4.5	4.5	4.5
C.I.S (12)	942	512	503	515	519	526	10.8	4.5	4.4	4.4	4.3	4.2
IRAN ISLAMIC REP.	391	436	444	450	455	461	4.5	3.9	3.9	3.8	3.8	3.7
AUSTRALIA	434	378	422	361	311	319	5.0	3.4	3.7	3.1	2.6	2.6
TURKEY	369	373	351	332	323	318	4.1	3.3	3.1	2.8	2.7	2.6
NIGERIA	178	234	229	239	241	242	2.0	2.1	2.0	2.0	2.0	1.9
ALGERIA	178	182	178	195	203	218	2.0	1.6	1.6	1.7	1.7	1.8
OTHERS	3,484	3,850	3,895	3,961	4,030	4,122	39.8	34.2	34.1	33.7	33.4	33.1

OVINE MEAT : P/C CONSUMPT. (Kg / head -)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
							Ov.Meat P/C Cons. as a % of Tot.Meat P/C Consump.					
WORLD	1.6	1.9	1.9	1.9	1.9	2.0	5.6	4.8	4.8	4.8	4.8	4.9
Developed countries	1.9	2.3	2.3	2.3	2.3	2.3	3.7	3.0	2.9	2.7	2.7	2.8
Developing countries	1.5	1.7	1.7	1.8	1.8	1.9	6.9	6.3	6.3	6.3	6.4	6.5
NEW ZEALAND	38.5	40.8	60.3	47.1	50.3	50.7						
ICELAND	29.7	29.9	25.1	25.1	24.3	24.1						
TONGA	35.1	29.6	26.6	25.0	21.3	20.2						
KUWAIT	16.1	20.3	17.9	18.7	18.8	18.6						
AUSTRALIA	24.7	20.0	22.2	18.7	18.0	16.3						
QATAR	19.5	15.8	19.6	21.4	22.3	22.0						
SAMOA	18.3	8.9	13.7	14.7	12.2	11.2						
UNIT. ARAB EMIR.	24.2	18.5	15.1	18.8	16.6	17.2						
FIJI	16.6	15.0	12.8	11.8	12.9	12.8						
URUGUAY	16.8	10.3	12.6	12.6	12.8	13.1						

PIG MEAT: PRODUCTION (000 mt - CWE)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
								%	%	%	%	%
WORLD	88,550	89,497	91,178	94,186	96,150	97,726	100.0	100.0	100.0	100.0	100.0	100.0
Developed countries	20,190	37,643	37,315	38,176	38,638	38,579	34.5	42.1	40.9	40.5	40.2	39.5
Developing countries	38,361	51,853	53,863	56,010	57,513	59,147	65.5	57.9	59.1	59.5	59.8	60.5
CHINA (MAINLAND)	28,544	40,314	41,846	43,266	44,600	45,940	48.8	45.0	45.9	45.9	46.4	47.0
EU (15)	0	17,676	17,676	18,004	17,996	17,800	0.0	19.8	19.4	19.1	18.7	18.2
UNITED STATES	7,751	8,597	8,691	8,930	9,076	9,302	13.2	9.6	9.5	9.5	9.4	9.5
C.I.S. (12)	4,113	2,816	2,703	2,758	2,853	2,917	7.0	3.1	3.0	2.9	3.0	3.0
BRAZIL	1,260	1,868	1,968	2,100	2,100	2,060	2.1	2.1	2.2	2.2	2.2	2.1
VIET NAM	878	1,409	1,515	1,664	1,795	1,900	1.5	1.6	1.7	1.8	1.9	1.9
POLAND	1,903	1,823	1,849	2,023	2,200	2,060	3.3	2.1	2.0	2.1	2.3	2.1
MEXICO	822	1,090	1,058	1,070	1,084	1,135	1.4	1.2	1.2	1.1	1.1	1.2
CANADA	1,194	1,841	1,729	1,854	1,910	1,920	2.0	1.8	1.9	2.0	2.0	2.0
JAPAN	1,440	1,271	1,242	1,244	1,260	1,270	2.6	1.4	1.4	1.3	1.3	1.3
OTHERS	10,656	10,930	10,903	11,281	11,286	11,442	18.2	12.2	12.0	12.0	11.7	11.7

PIG MEAT: IMPORT (000 mt - CWE)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
WORLD (excl. EC I-t)	1,807.4	3,282.0	3,476.4	4,107.7	4,186.3	4,273.3	100.0	100.0	100.0	100.0	100.0	100.0
Developed countries	1,434.8	2,075.8	2,349.2	2,860.1	2,712.7	2,730.8	79.4	63.2	67.6	69.4	64.8	63.9
Developing countries	372.6	1,206.2	1,126.2	1,247.8	1,472.6	1,542.5	20.6	36.8	32.4	30.6	35.2	36.1
JAPAN	496.1	889.8	961.4	1,046.0	890.0	1,000.0	27.5	27.1	27.7	25.5	21.3	23.4
C.I.S. (12)	373.7	267.8	437.2	670.6	588.7	522.8	20.7	8.2	12.6	16.3	14.1	12.2
UNITED STATES	326.2	435.6	428.0	490.2	532.0	507.0	18.1	13.3	12.3	11.7	12.7	11.9
MEXICO	92.9	245.5	262.6	288.9	340.0	345.0	5.1	7.5	7.6	7.0	8.1	8.1
HONG KONG	94.7	228.9	236.8	247.8	275.0	300.0	5.2	6.9	6.9	6.0	6.6	7.0
KOREA, REP.	8.0	172.3	128.3	166.4	153.0	170.0	0.3	5.2	3.6	3.8	3.7	4.0
CANADA	25.3	72.6	93.6	84.8	97.0	105.0	1.4	2.2	2.7	2.3	2.3	2.5
ARGENTINA	28.6	62.8	58.0	11.8	45.0	25.0	1.6	1.9	1.7	0.3	1.1	0.6
POLAND	58.3	40.6	22.4	50.0	35.0	35.0	3.3	1.2	0.6	1.2	0.8	0.8
SLOVENIA	24.9	16.7	24.9	28.8	30.0	20.0	1.4	0.5	0.7	0.6	0.7	0.5
OTHERS	279.7	853.6	823.1	1,036.5	1,199.6	1,243.6	15.5	26.0	23.7	25.2	28.7	29.1

PIG MEAT: EXPORT (000 mt - CWE)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
WORLD (excl. EC I-t)	1,894.8	3,226.5	3,293.6	3,808.2	4,186.5	4,271.3	100.0	100.0	100.0	100.0	100.0	100.0
Developed countries	1,373.1	2,748.3	2,547.9	2,744.4	3,003.2	3,162.1	72.5	85.2	77.4	72.1	71.7	74.0
Developing countries	521.7	478.1	745.9	1,062.8	1,183.3	1,109.1	27.5	14.8	22.6	27.9	28.3	26.0
EU (15) (excl. intra-trade)	690.9	1,187.8	910.7	890.7	985.0	950.0	36.5	36.8	27.6	23.4	23.5	22.2
CANADA	274.5	595.7	568.1	772.5	900.0	976.0	14.5	18.5	20.0	20.3	21.5	22.8
UNITED STATES	182.2	580.1	628.9	662.8	696.0	788.0	9.6	18.0	19.1	17.4	16.6	18.4
BRAZIL	47.8	153.3	297.2	511.4	530.0	320.0	2.5	4.8	9.0	13.4	12.7	7.5
CHINA (MAINLAND)	169.9	139.8	213.7	280.4	380.0	470.0	9.0	4.3	6.5	7.4	9.1	11.0
HUNGARY	72.2	150.8	128.9	114.3	115.0	120.0	3.8	4.7	3.9	3.0	2.7	2.8
AUSTRALIA	7.8	41.0	55.5	55.6	55.0	64.0	0.4	1.3	1.7	1.7	1.5	1.5
MEXICO	4.3	56.3	58.9	61.0	60.0	75.0	0.2	1.7	1.8	1.6	1.4	1.8
POLAND	13.2	117.9	74.9	64.9	140.0	140.0	0.7	3.7	2.3	1.4	3.3	3.3
KOREA, REP.	13.7	30.0	40.0	20.7	22.0	25.0	0.7	0.9	1.2	0.5	0.5	0.6
OTHERS	418.2	174.0	228.0	276.2	293.5	344.3	22.1	5.4	6.9	7.2	7.0	8.1

PIG MEAT : APPAR. CONSUMPT. (000 mt - CWE)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
WORLD	88,486	90,200	91,319	94,288	96,210	97,845	100.0	100.0	100.0	100.0	100.0	100.0
Developed countries	20,284	37,733	37,054	38,173	38,398	38,240	34.7	41.8	40.6	40.5	39.9	39.1
Developing countries	38,212	52,468	54,265	56,113	57,812	59,606	65.3	58.2	59.4	59.5	60.1	60.9
CHINA (MAINLAND)	28,374	40,340	41,746	43,151	44,400	45,656	48.5	44.7	45.7	45.8	46.1	46.7
EU (15)	-659	17,291	16,828	17,045	17,101	16,922	-1.0	19.2	18.4	18.1	17.8	17.3
UNITED STATES	7,884	8,457	8,464	8,759	8,912	9,053	13.6	9.4	9.3	9.3	9.3	9.3
C.I.S. (12)	4,448	3,061	3,107	3,393	3,406	3,401	7.6	3.4	3.4	3.6	3.5	3.5
JAPAN	1,935	2,124	2,158	2,269	2,129	2,289	3.3	2.4	2.4	2.4	2.2	2.3
POLAND	1,907	1,870	1,803	1,985	2,119	1,968	3.3	2.1	2.0	2.1	2.2	2.0
VIET NAM	858	1,397	1,488	1,642	1,790	1,890	1.5	1.5	1.6	1.7	1.9	1.9
BRAZIL	1,203	1,714	1,897	1,869	1,670	1,730	2.1	1.9	1.9	1.7	1.6	1.8
PHILIPPINES	731	1,047	1,093	1,372	1,186	1,214	1.2	1.2	1.2	1.5	1.2	1.2
CANADA	946	1,116	1,162	1,167	1,121	1,060	1.6	1.2	1.3	1.2	1.2	1.1
OTHERS	10,778	11,783	11,783	11,915	12,472	12,674	18.4	13.1	12.9	12.6	13.0	13.0

PIG MEAT : P/C CONSUMPT. (Kg / head -)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
							Pig Meat P/C Cons. as a % of Tot.Meat P/C Consump.					
WORLD	16.6	14.9	14.9	15.2	15.3	15.4	37.2	36.6	36.4	36.2	36.4	36.6
Developed countries	16.1	29.1	28.6	29.3	29.4	29.2	31.1	36.8	36.6	36.6	36.7	36.4
Developing countries	9.0	11.0	11.2	11.5	11.8	11.8	41.5	40.0	40.5	40.3	40.5	41.0
CYPRUS	63.8	63.7	62.1	62.9	63.4	64.0						
HONG KONG	39.2	50.1	51.2	51.7	52.3	54.5						
POLAND	49.6	48.2	46.5	51.1	54.5	50.6						
HUNGARY	52.0	50.8	43.7	49.9	45.9	44.5						
EU (15)	-1.5	46.1	44.8	45.3	45.5	45.0						
CHINA TAIWAN PROV.]	43.1	43.2	43.3	42.2	42.0	42.8						
CANADA	32.7	35.8	36.5	36.8	35.0	32.5						
SWITZERLAND	37.5	32.8	32.9	33.2	33.1	33.7						
SINGAPORE	33.0	28.4	28.1	28.7	29.8	32.0						
PARAGUAY	27.7	27.1	28.9	15.2	16.4	16.8						

POULTRY MEAT: PRODUCTION (000 mt - CWE)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
								%	%	%	%	%
WORLD	40,784	68,963	71,473	74,591	76,072	77,122	100.0	100.0	100.0	100.0	100.0	100.0
Developed countries	19,270	32,629	33,736	34,915	35,038	35,801	47.2	47.3	47.2	46.8	46.1	46.4
Developing countries	21,516	36,334	37,737	39,676	41,035	41,321	52.8	52.7	52.8	53.2	53.9	53.6
UNITED STATES	12,440	16,416	16,813	17,516	17,700	18,200	30.5	23.8	23.5	23.5	23.3	23.6
CHINA (MAINLAND)	5,736	12,076	12,103	12,620	13,150	13,150	14.1	17.5	16.9	16.9	17.3	17.1
EU (15)	0	8,901	9,018	9,027	8,616	8,700	0.0	12.8	12.6	12.0	11.3	11.3
BRAZIL	3,235	6,125	6,395	7,229	7,387	7,835	7.9	8.9	8.9	9.7	9.7	10.2
MEXICO	1,071	1,863	1,976	2,123	2,182	2,300	2.6	2.7	2.8	2.8	2.9	3.0
C.I.S (12)	1,996	1,134	1,300	1,463	1,521	1,723	4.9	1.6	1.8	2.0	2.1	2.2
THAILAND	1,056	1,194	1,336	1,413	1,413	1,000	2.6	1.7	1.9	1.9	1.9	1.3
JAPAN	1,318	1,195	1,216	1,229	1,218	1,200	3.2	1.7	1.7	1.6	1.6	1.6
CANADA	773	1,064	1,110	1,111	1,091	1,100	1.9	1.5	1.6	1.5	1.4	1.4
ARGENTINA	713	1,000	993	873	976	980	1.7	1.5	1.4	1.3	1.3	1.3
OTHERS	12,447	18,096	19,213	19,997	20,720	20,934	30.5	26.2	26.9	26.8	27.2	27.1

POULTRY MEAT: IMPORT (000 mt - CWE)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
WORLD (excl. EC I-t)	2,710.1	7,362.9	7,720.0	7,843.2	7,858.4	7,582.3	100.0	100.0	100.0	100.0	100.0	100.0
Developed countries	1,134.4	3,381.3	3,822.3	3,969.0	3,903.3	3,588.5	41.9	45.9	49.5	50.6	49.7	47.3
Developing countries	1,575.7	3,981.6	3,897.7	3,874.2	3,956.1	3,993.8	58.1	54.1	50.5	49.4	50.3	52.7
C.I.S (12)	196.2	1,439.3	1,646.9	1,671.0	1,485.4	1,371.5	7.2	19.5	21.3	21.3	18.9	18.1
JAPAN	436.3	807.3	807.3	856.7	810.0	660.0	16.1	11.0	10.5	11.0	10.3	8.6
HONG KONG	362.7	1,088.5	966.6	836.2	700.0	760.0	13.4	14.8	12.5	10.6	8.9	9.9
EU (15) (excl. intra-trade)	201.0	384.9	669.0	631.0	750.0	660.0	7.4	5.2	8.7	8.0	9.5	8.7
CHINA (MAINLAND)	99.7	850.3	707.2	574.5	570.0	430.0	3.7	11.5	9.2	7.3	7.3	5.7
MEXICO	192.4	362.0	388.4	396.3	436.0	450.0	7.1	4.9	5.0	5.1	5.5	5.9
SAUDI ARABIA	170.0	350.0	403.0	395.0	405.0	410.0	6.3	4.8	5.2	5.0	5.2	5.4
CANADA	68.6	127.8	132.0	147.3	150.0	155.0	2.5	1.7	1.7	1.9	1.9	2.0
UNIT. ARAB EMIR.	75.0	110.9	131.0	133.4	136.0	140.0	2.8	1.5	1.7	1.7	1.8	1.8
LATVIA	0.4	154.0	58.9	61.0	63.0	65.0	0.0	2.1	0.8	0.8	0.8	0.9
OTHERS	907.9	1,688.0	1,809.7	2,135.8	2,351.9	2,500.8	33.5	22.9	23.4	27.2	29.9	33.0

POULTRY MEAT: EXPORT (000 mt - CWE)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
WORLD (excl. EC I-t)	3,020.9	7,298.8	7,843.5	7,826.4	7,924.8	7,587.2	100.0	100.0	100.0	100.0	100.0	100.0
Developed countries	1,942.4	4,451.2	4,654.1	4,232.0	4,038.8	3,848.8	64.3	61.0	58.1	54.1	51.0	50.7
Developing countries	1,078.5	2,847.6	3,259.4	3,594.4	3,886.8	3,738.4	35.7	39.0	41.9	45.9	49.0	49.3
UNITED STATES	1,090.5	2,911.8	3,171.4	2,696.9	2,767.0	2,480.0	36.1	39.9	40.4	34.3	34.8	32.7
BRAZIL	526.2	964.6	1,343.6	1,728.3	2,100.0	2,300.0	17.4	13.2	17.1	22.1	26.5	30.3
EU (15) (excl. intra-trade)	643.2	1,019.6	961.3	1,088.8	800.0	850.0	21.3	14.0	12.3	13.9	10.1	11.2
HONG KONG	169.7	812.4	692.9	588.0	495.0	470.0	5.6	11.1	8.8	7.5	6.2	6.2
CHINA (MAINLAND)	113.8	548.9	580.8	580.3	500.0	425.0	3.8	7.5	7.4	7.2	6.3	5.6
THAILAND	177.6	395.6	511.3	562.0	555.0	325.0	5.9	5.4	6.5	7.1	7.4	4.3
HUNGARY	77.4	121.8	131.9	134.0	120.0	140.0	2.6	1.7	1.7	1.7	1.5	1.8
CANADA	14.8	84.3	97.5	114.5	100.0	105.0	0.5	1.2	1.2	1.5	1.3	1.4
POLAND	15.0	48.0	51.5	44.5	77.0	85.0	0.5	0.7	0.7	0.6	1.0	1.1
LATVIA	0.1	154.0	20.0	30.0	30.0	30.0	0.0	2.1	0.3	0.4	0.4	0.4
OTHERS	192.5	236.6	281.2	303.1	360.8	377.2	6.4	3.2	3.6	3.9	4.6	5.0

POULTRY MEAT : APPAR. CONSUMPT. (000 mt - CWE)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
WORLD	40,398	68,934	71,311	74,473	76,108	77,216	100.0	100.0	100.0	100.0	100.0	100.0
Developed countries	18,391	31,491	32,938	34,563	35,022	35,610	45.5	45.7	46.2	46.4	46.0	46.1
Developing countries	22,007	37,444	38,372	39,910	41,084	41,606	54.5	54.3	53.8	53.6	54.0	53.9
UNITED STATES	11,303	13,629	13,710	14,796	15,037	15,774	28.0	19.6	19.2	19.9	19.8	20.4
CHINA (MAINLAND)	5,722	12,376	12,229	12,634	13,220	13,165	14.2	18.0	17.1	17.0	17.4	17.0
EU (15)	-442	8,166	8,725	8,471	8,566	8,510	-1.1	11.8	12.2	11.4	11.3	11.0
BRAZIL	2,709	5,160	5,048	5,503	5,288	5,535	6.7	7.5	7.1	7.4	6.9	7.2
C.I.S (12)	2,191	2,541	2,821	3,117	3,125	3,132	5.4	3.7	4.0	4.2	4.1	4.1
MEXICO	1,261	2,214	2,364	2,516	2,612	2,744	3.1	3.2	3.3	3.4	3.4	3.6
JAPAN	1,749	1,977	2,037	2,068	2,043	1,846	4.3	2.9	2.9	2.8	2.7	2.4
CANADA	825	1,106	1,133	1,143	1,147	1,150	2.0	1.6	1.6	1.5	1.5	1.5
MALAYSIA	641	801	816	878	933	938	1.6	1.2	1.1	1.2	1.2	1.2
THAILAND	878	792	843	821	809	706	2.2	1.1	1.2	1.1	1.1	0.9
OTHERS	13,561	20,271	21,595	22,524	23,326	23,725	33.6	29.4	30.3	30.2	30.6	30.7

POULTRY MEAT : P/C CONSUMPT. (Kg / head -)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
							Poul.Meat P/C Cons. as a % of Tot.Meat P/C Consump.					
WORLD	7.3	11.4	11.6	12.0	12.1	12.2	25.7	29.5	30.0	30.2	30.4	30.4
Developed countries	14.6	24.3	25.4	26.5	26.8	27.2	28.2	30.7	31.7	32.2	32.6	33.0
Developing countries	5.2	7.9	7.9	8.1	8.3	8.2	23.9	28.6	28.7	28.7	28.8	28.6
QATAR	32.9	47.3	53.8	51.6	54.1	61.1						
ISRAEL	43.4	64.5	69.2	69.2	67.0	68.1						
UNIT. ARAB EMIR.	31.2	56.6	53.9	56.7	59.6	64.1						
KUWAIT	37.6	46.4	52.7	47.0	47.1	49.4						
UNITED STATES	43.2	48.8	48.9	52.4	52.9	55.1						
SINGAPORE	36.2	47.6	45.3	46.1	49.2	48.4						
HONG KONG	45.2	49.5	47.7	43.3	36.8	46.7						
CYPRUS	37.2	43.8	44.9	41.8	39.4	40.6						
VENEZUELA	17.8	27.8	36.5	36.1	35.5	35.3						
BRAZIL	17.5	30.3	29.3	31.6	30.0	31.0						

OTHER MEAT: PRODUCTION (000 mt - CWE)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
								%	%	%	%	%
WORLD	3,051	4,282	4,503	4,493	4,452	4,456	100.0	100.0	100.0	100.0	100.0	100.0
Developed countries	695	1,582	1,597	1,588	1,554	1,531	22.8	37.0	35.5	35.3	34.9	34.4
Developing countries	2,356	2,700	2,906	2,907	2,898	2,926	77.2	63.0	64.5	64.7	65.1	65.6
CHINA (MAINLAND)	573	797	976	971	965	960	18.8	18.6	21.7	21.6	21.7	21.5
EU (15)	0	927	947	921	900	880	0.0	21.6	21.0	20.5	20.2	19.7
UNITED STATES	257	237	234	234	222	220	8.4	5.5	5.2	5.2	5.0	4.9
CONGO, DEM. REP.	126	144	144	144	144	149	4.1	3.4	3.2	3.2	3.2	3.3
INDIA	131	138	140	140	140	140	4.3	3.2	3.1	3.1	3.2	3.1
ETHIOPIA	127	126	128	128	128	128	4.2	2.9	2.8	2.8	2.9	2.9
ARGENTINA	106	117	117	118	118	113	3.5	2.7	2.6	2.6	2.7	2.5
NIGERIA	100	100	100	100	100	100	3.3	2.3	2.2	2.2	2.2	2.2
GHANA	90	90	90	90	90	90	2.9	2.1	2.0	2.0	2.0	2.0
MEXICO	97	83	83	83	85	87	3.2	1.9	1.8	1.8	1.9	2.0
OTHERS	1,443	1,523	1,544	1,564	1,559	1,589	47.3	35.6	34.3	34.8	35.0	35.7

OTHER MEAT: IMPORT (000 mt - CWE)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
WORLD (excl. EC I-t-I.)	274.5	267.0	414.3	372.1	370.0	374.4	100.0	100.0	100.0	100.0	100.0	100.0
Developed countries	214.5	196.9	323.5	247.6	259.4	260.8	7.0	4.6	7.2	5.5	5.8	5.9
Developing countries	60.0	71.1	90.8	124.5	110.6	113.6	2.0	1.7	2.0	2.8	2.5	2.5
EU (15) (excl. intra-trade)	159.3	132.1	280.4	178.1	180.0	180.0	58.0	49.5	62.9	47.9	48.7	48.1
MEXICO	15.7	36.5	51.2	55.0	55.0	55.0	5.7	13.7	12.4	14.8	14.9	14.7
C.I.S (12)	1.2	25.0	22.5	30.0	39.8	40.7	0.4	9.4	5.4	8.1	10.8	10.9
SWITZERLAND	11.5	11.3	12.6	12.1	11.8	11.9	4.2	4.2	3.0	3.2	3.2	3.2
JAPAN	33.5	14.3	14.0	10.7	11.0	11.0	12.2	5.3	3.4	2.9	3.0	2.9
KOREA, REP	1.1	3.8	4.6	5.0	5.0	5.0	0.4	1.4	1.1	1.3	1.4	1.3
HONG KONG	6.7	5.6	4.7	4.0	4.0	4.0	2.5	2.1	1.1	1.1	1.1	1.1
CANADA	1.0	2.0	2.4	3.1	3.0	3.0	0.3	0.8	0.6	0.8	0.8	0.8
CZECK, REP	0.8	2.1	2.5	2.5	3.0	3.2	0.3	0.8	0.6	0.7	0.8	0.8
SAUDI ARABIA	1.0	2.9	1.0	1.5	1.5	1.5	0.4	1.1	0.2	0.4	0.4	0.4
OTHERS	42.7	31.5	38.3	70.1	55.9	59.1	15.5	11.8	9.3	18.8	15.1	15.8

OTHER MEAT: EXPORT (000 mt - CWE)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
WORLD (excl. EC I-t-I.)	261.6	236.3	270.0	290.1	272.2	278.5	100.0	100.0	100.0	100.0	100.0	100.0
Developed countries	146.1	123.5	132.4	110.1	108.1	108.9	4.8	2.9	2.9	2.4	2.4	2.4
Developing countries	115.5	112.8	137.6	180.0	164.1	169.5	3.5	2.6	3.1	4.0	3.7	3.8
CHINA (MAINLAND)	39.4	44.6	56.3	60.0	65.0	65.0	15.1	18.9	20.9	20.7	23.9	23.3
ARGENTINA	38.2	32.2	32.1	37.7	38.0	40.0	14.6	13.6	11.9	13.0	14.0	14.4
UNITED STATES	44.9	36.1	40.8	21.8	22.0	22.0	17.2	15.3	15.1	7.5	8.1	7.9
AUSTRALIA	10.6	18.4	20.0	20.0	20.0	20.0	4.1	7.8	7.4	6.9	7.3	7.2
NEW ZEALAND	15.2	17.5	19.1	19.0	19.0	19.0	5.8	7.4	7.1	6.5	7.0	6.8
BRAZIL	15.7	15.1	18.7	19.0	19.0	19.0	6.0	6.4	6.9	6.5	7.0	6.8
EU (15) (excl. intra-trade)	16.1	5.6	6.4	6.2	6.0	6.0	6.1	2.4	2.4	2.1	2.2	2.2
CANADA	16.6	16.1	16.7	13.3	13.0	13.0	7.2	6.4	5.8	4.6	4.8	4.7
POLAND	11.9	12.7	9.8	10.0	10.0	10.0	4.5	5.4	3.6	3.4	3.7	3.6
HUNGARY	16.6	5.3	7.3	7.3	7.0	7.0	6.3	2.2	2.7	2.5	2.6	2.5
OTHERS	34.2	33.7	43.8	75.8	53.2	57.5	13.1	14.3	16.2	26.1	19.6	20.6

OTHER MEAT : APPAR. CONSUMPT. (000 mt - CWE)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
WORLD	3,062	4,313	4,647	4,575	4,550	4,562	100.0	100.0	100.0	100.0	100.0	100.0
Developed countries	761	1,655	1,788	1,723	1,705	1,683	25.0	38.6	39.7	38.4	38.3	37.8
Developing countries	2,301	2,658	2,859	2,851	2,845	2,869	75.4	62.1	63.5	63.5	63.9	64.4
EU (15)	143	1,053	1,201	1,093	1,074	1,054	4.7	24.4	25.8	23.9	23.6	23.2
CHINA (MAINLAND)	534	763	920	911	900	895	17.4	17.5	19.8	19.9	19.8	19.7
C.I.S (12)	210	203	203	231	245	239	6.8	4.7	4.4	5.1	5.4	5.3
UNITED STATES	214	206	198	218	206	204	7.0	4.8	4.3	4.8	4.5	4.5
CONGO, DEM. REP.	126	144	144	144	144	149	4.1	3.3	3.1	3.1	3.2	3.3
INDIA	131	138	140	140	140	140	4.3	3.2	3.0	3.1	3.1	3.1
MEXICO	111	117	132	136	138	140	3.6	2.7	2.8	3.0	3.0	3.1
SAUDI ARAB.	52	52	51	51	51	48	1.7	1.2	1.1	1.1	1.1	1.1
CZECH, REP	31	38	39	39	40	42	1.0	0.9	0.8	0.9	0.9	0.9
PERU	37	32	32	33	34	32	1.2	0.7	0.7	0.7	0.8	0.7
OTHERS	1,474	1,576	1,667	1,578	1,576	1,606	48.1	36.5	34.1	34.5	34.6	35.3

OTHER MEAT : P/C CONSUMPT. (Kg / head -)	1993	2000	2001	2002	2003	2004	1993	2000	2001	2002	2003	2004
							Oth.Meat P/C Cons. as a % of Tot.Meat P/C Consump.					
WORLD	0.6	0.7	0.8	0.7	0.7	0.7	1.9	1.8	2.0	1.9	1.8	1.8
Developed countries	0.6	1.3	1.4	1.3	1.3	1.3	1.2	1.6	1.7	1.6	1.6	1.6
Developing countries	0.5	0.6	0.6	0.6	0.6	0.6	2.5	2.0	2.1	2.0	2.0	2.0
UNIT. ARAB EMIR.	7.7	6.4	6.3	6.1	6.0	6.6						
REUNION	6.0	5.9	6.0	6.1	6.0	6.1						
QATAR	2.7	2.7	2.5	3.6	3.0	3.0						
CYPRUS	1.2	1.7	1.9	1.7	1.8	1.8						
HONG KONG	1.9	1.6	1.5	1.4	1.3	1.3						
UNITED STATES	0.8	0.7	0.7	0.8	0.7	0.7						
SINGAPORE	0.0	0.3	0.9	0.8	0.8	0.9						
KUWAIT	0.4	0.4	0.4	0.2	0.2	0.2						

MEAT PRODUCTION

	Bovine Meat				Ovine Meat				Pig Meat				Poultry Meat				Total Meat 1/			
	2001	2002	2003	2004	2001	2002	2003	2004	2001	2002	2003	2004	2001	2002	2003	2004	2001	2002	2003	2004
	Million tons - CWE				Million tons - CWE				Million tons - CWE				Million tons - CWE				Million tons - CWE			
World	**59.2**	**61.3**	**61.7**	**61.9**	**11.4**	**11.8**	**12.0**	**12.4**	**91.2**	**94.2**	**96.2**	**97.7**	**71.5**	**74.6**	**76.1**	**77.1**	**237.8**	**246.3**	**250.4**	**253.6**
Africa	**4.4**	**4.5**	**4.5**	**4.6**	**1.9**	**1.9**	**1.9**	**2.0**	**0.7**	**0.7**	**0.7**	**0.8**	**3.2**	**3.3**	**3.3**	**3.4**	**11.5**	**11.6**	**11.7**	**12.0**
Egypt	0.6	0.6	0.6	0.6	0.1	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.6	0.7	0.7	0.7	1.4	1.5	1.5	1.5
Nigeria	0.4	0.4	0.4	0.4	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	1.0	1.1	1.1	1.1
South Africa	0.6	0.6	0.6	0.6	0.1	0.1	0.2	0.2	0.1	0.1	0.1	0.1	0.8	0.8	0.9	0.9	1.7	1.7	1.7	1.7
Others	2.9	3.0	3.0	3.1	1.4	1.4	1.4	1.5	0.4	0.5	0.5	0.5	1.8	1.8	1.8	1.7	7.3	7.4	7.5	7.7
North & Central America	**15.2**	**15.7**	**15.3**	**15.1**	**0.2**	**0.2**	**0.2**	**0.2**	**11.8**	**12.2**	**12.4**	**12.7**	**20.9**	**21.8**	**22.0**	**22.6**	**48.5**	**50.2**	**50.3**	**51.0**
Canada	1.2	1.3	1.2	1.5	0.0	0.0	0.0	0.0	1.7	1.9	1.9	1.9	1.1	1.1	1.1	1.1	4.1	4.3	4.3	4.5
Mexico	1.4	1.5	1.5	1.5	0.1	0.1	0.1	0.1	1.1	1.1	1.1	1.1	2.0	2.1	2.2	2.3	4.6	4.8	4.9	5.1
USA	12.0	12.4	12.0	11.6	0.1	0.1	0.1	0.1	8.7	8.9	9.1	9.3	16.8	17.5	17.7	18.2	37.8	39.2	39.1	39.3
Others	0.6	0.6	0.6	0.6	0.0	0.0	0.0	0.0	0.3	0.3	0.3	0.4	1.0	1.0	1.0	1.0	1.9	1.9	2.0	2.0
South America	**11.5**	**12.3**	**12.7**	**12.8**	**0.3**	**0.3**	**0.3**	**0.4**	**3.1**	**3.3**	**3.3**	**3.3**	**10.3**	**11.2**	**11.4**	**11.9**	**25.5**	**27.4**	**28.0**	**28.6**
Argentina	2.5	2.7	2.8	2.7	0.1	0.1	0.1	0.1	0.2	0.2	0.2	0.2	1.0	1.0	1.0	1.0	3.8	4.1	4.2	4.0
Brazil	6.7	7.1	7.4	7.6	0.1	0.1	0.1	0.1	2.0	2.1	2.1	2.1	6.4	7.2	7.4	7.8	16.2	16.6	17.0	17.6
Colombia	0.7	0.7	0.7	0.7	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1	0.6	0.6	0.6	0.6	1.4	1.4	1.4	1.4
Uruguay	0.3	0.4	0.4	0.5	0.1	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1	0.5	0.5	0.6	0.6
Others	1.4	1.4	1.4	1.4	0.1	0.1	0.1	0.1	0.8	0.8	0.9	0.9	2.3	2.3	2.4	2.4	4.6	4.7	4.8	5.0
Asia 2/	**13.8**	**14.4**	**14.8**	**15.4**	**6.3**	**6.7**	**6.9**	**7.2**	**50.2**	**52.2**	**53.6**	**55.2**	**23.8**	**24.7**	**25.7**	**25.2**	**95.5**	**99.3**	**102.4**	**104.4**
China, Mainland	5.5	5.8	6.1	6.5	2.9	3.2	3.4	3.6	41.8	43.3	44.6	45.9	12.1	12.6	13.2	13.2	63.3	66.9	68.2	70.2
India	2.9	2.9	3.0	3.1	0.7	0.7	0.7	0.7	0.6	0.6	0.6	0.6	1.3	1.4	1.6	1.8	5.6	5.8	6.0	6.3
Japan	0.5	0.5	0.5	0.5	0.0	0.0	0.0	0.0	1.2	1.2	1.3	1.3	1.2	1.2	1.2	1.2	2.9	3.0	3.0	3.0
Pakistan	0.9	0.9	1.0	1.0	0.5	0.5	0.5	0.6	0.0	0.0	0.0	0.0	0.3	0.4	0.4	0.4	1.8	1.8	1.9	1.9
Thailand	0.2	0.2	0.3	0.3	0.0	0.0	0.0	0.0	0.5	0.5	0.6	0.5	1.3	1.4	1.4	1.0	2.1	2.2	2.2	1.8
Others	3.8	3.9	4.0	4.0	2.1	2.3	2.2	2.3	6.1	6.5	6.6	6.8	7.6	7.8	7.9	7.8	19.9	20.7	21.0	21.2
Europe 3/	**11.5**	**11.7**	**11.7**	**11.4**	**1.4**	**1.4**	**1.5**	**1.5**	**24.5**	**25.3**	**25.5**	**25.2**	**12.5**	**12.8**	**12.8**	**13.0**	**51.3**	**52.4**	**52.6**	**52.3**
EU (15)	7.4	7.5	7.4	7.3	1.0	1.1	1.1	1.1	17.7	18.0	18.0	17.8	9.0	8.9	8.6	8.7	36.0	36.4	36.0	35.8
Other West Europe	0.2	0.2	0.2	0.2	0.0	0.0	0.0	0.0	0.4	0.4	0.4	0.4	0.1	0.1	0.1	0.1	0.7	0.8	0.8	0.8
Hungary	0.1	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.5	0.6	0.5	0.5	0.5	0.5	0.5	0.5	1.1	1.1	1.1	1.1
Poland	0.3	0.3	0.3	0.3	0.0	0.0	0.0	0.0	1.8	2.0	2.2	2.1	0.7	0.9	0.9	0.9	2.9	3.2	3.4	3.2
Romania	0.1	0.2	0.2	0.2	0.1	0.1	0.1	0.1	0.5	0.5	0.5	0.5	0.3	0.3	0.4	0.4	1.0	1.0	1.1	1.1
Other East Europe	0.5	0.4	0.4	0.4	0.1	0.1	0.1	0.1	1.4	1.2	1.2	1.2	0.6	0.7	0.8	0.8	2.6	2.5	2.6	2.6
Oceania	**2.7**	**2.6**	**2.6**	**2.6**	**1.3**	**1.2**	**1.1**	**1.1**	**0.5**	**0.5**	**0.5**	**0.5**	**0.8**	**0.8**	**0.9**	**0.9**	**5.4**	**5.2**	**5.2**	**5.2**
Australia	2.1	2.0	1.9	1.9	0.7	0.7	0.6	0.6	0.4	0.4	0.4	0.4	0.7	0.7	0.7	0.7	3.9	3.8	3.6	3.6
New Zealand	0.6	0.6	0.6	0.6	0.6	0.5	0.5	0.6	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1	1.3	1.3	1.4	1.4
CIS (12)	**3.8**	**4.0**	**4.0**	**3.9**	**0.5**	**0.5**	**0.5**	**0.5**	**2.7**	**2.8**	**2.9**	**2.9**	**1.3**	**1.5**	**1.6**	**1.7**	**8.4**	**8.9**	**9.2**	**9.3**
Developed countries	**29.5**	**30.2**	**29.7**	**29.1**	**3.3**	**3.2**	**3.2**	**3.2**	**37.3**	**38.2**	**38.6**	**38.6**	**33.7**	**34.9**	**35.0**	**35.8**	**105.4**	**108.1**	**108.2**	**108.2**
Developing countries	**29.7**	**31.1**	**32.0**	**32.8**	**8.2**	**8.6**	**8.8**	**9.2**	**53.9**	**56.0**	**57.5**	**59.1**	**37.7**	**39.7**	**41.0**	**41.3**	**132.4**	**138.2**	**142.2**	**145.4**

1/ Including Other Meat
2/ Including CIS countries in Asia
3/ Including Baltic States & CIS countries in Europe.

MEAT IMPORTS

	Bovine Meat				Ovine Meat				Pig Meat				Poultry Meat				Total Meat 1/			
	2001	2002	2003	2004	2001	2002	2003	2004	2001	2002	2003	2004	2001	2002	2003	2004	2001	2002	2003	2004
	Thousand tons - CWE				Thousand tons - CWE				Thousand tons - CWE				Thousand tons - CWE				Thousand tons - CWE			
World 2/	5430.5	5833.9	5986.4	5495.7	689.0	686.6	711.9	742.9	3475.4	4107.7	4185.3	4273.3	7720.0	7843.2	7859.4	7582.3	17729.2	18843.6	19113.0	18468.6
Africa	208.8	288.0	272.0	268.8	47.9	30.3	28.4	32.4	65.8	61.6	78.9	76.5	363.5	455.5	516.0	527.1	690.4	879.9	924.9	937.9
Angola	36.2	44.9	30.0	30.0	0.3	0.1	0.2	0.2	17.0	23.0	28.0	20.0	62.0	81.0	86.0	80.0	104.5	149.0	143.2	130.2
Egypt	97.6	142.3	130.0	130.0	2.0	0.7	1.0	1.0	0.0	0.1	0.1	0.1	4.4	5.4	7.0	7.0	104.1	148.8	138.5	138.5
South Africa	25.9	30.5	35.0	28.0	34.2	15.4	13.0	15.0	9.1	9.1	16.0	18.0	71.0	90.0	100.0	100.0	140.4	145.3	164.3	161.3
Others	50.1	70.3	77.0	80.8	11.5	14.1	14.2	16.2	29.7	29.3	34.8	38.4	236.1	279.2	324.0	340.1	341.4	436.7	479.0	508.0
North & Central America	2118.7	2208.1	2064.4	1993.1	146.1	149.8	162.7	170.6	863.9	937.9	1066.3	1059.2	820.3	913.7	997.5	1066.2	4011.7	4278.1	4359.5	4357.8
Canada	299.9	307.7	280.0	200.0	17.2	17.0	17.0	17.0	93.6	94.8	97.0	106.0	132.0	147.3	150.0	155.0	545.2	570.0	547.0	480.0
Mexico	399.0	459.2	425.0	300.0	48.9	47.0	55.0	60.0	262.6	288.9	340.0	345.0	388.4	399.3	436.0	450.0	1150.1	1249.3	1311.0	1210.0
USA	1352.5	1370.5	1261.0	1412.0	66.8	74.1	78.0	80.0	428.0	480.2	532.0	507.0	26.2	32.9	33.0	37.0	1880.0	1963.5	1930.0	2042.0
Others	67.4	70.7	78.4	81.1	13.1	11.7	12.7	13.6	79.7	74.0	97.3	102.2	271.6	334.2	378.5	424.2	436.4	496.3	571.5	625.8
South America	183.7	228.6	269.7	267.7	5.3	3.7	5.4	6.4	80.0	30.9	62.3	47.4	95.0	65.6	83.2	95.2	365.7	330.1	422.4	438.5
Argentina	13.6	7.1	12.0	10.0	1.1	1.0	1.0	1.0	68.0	11.8	46.0	26.0	26.7	1.2	10.0	15.0	99.6	21.2	68.2	51.2
Brazil	38.6	66.7	60.0	65.0	3.6	2.5	4.0	5.0	0.3	0.2	0.0	0.0	0.2	0.2	0.2	0.2	43.1	69.1	64.6	70.6
Chile	116.0	132.8	170.0	180.0	0.0	0.0	0.0	0.0	0.6	1.0	0.0	0.0	0.3	0.2	0.0	0.0	116.9	134.0	170.2	180.2
Others	16.6	23.0	27.7	32.7	0.6	0.2	0.4	0.4	21.2	17.8	17.3	22.4	67.8	64.0	73.0	80.0	107.1	105.8	119.4	136.5
Asia 3/	1867.5	1843.9	2092.4	1575.6	204.0	223.3	228.5	237.5	1624.1	1861.2	1808.4	1998.6	3753.3	3688.0	3584.9	3399.0	7483.4	7645.2	7744.6	7241.4
China , Mainland	5.6	16.0	18.0	8.0	26.4	34.9	32.0	30.0	116.1	176.1	180.0	186.0	707.2	574.5	570.0	430.0	853.7	799.9	800.4	653.4
China, Province of Taiwan	72.9	83.6	90.0	75.0	21.8	27.3	30.0	30.0	11.4	22.9	45.0	50.0	17.0	31.2	48.0	62.0	123.2	165.2	213.3	217.3
China, Hong Kong SAR	74.5	83.4	90.0	90.0	5.5	6.5	8.0	10.0	238.8	247.8	275.0	300.0	966.6	835.2	700.0	750.0	1290.1	1176.8	1077.0	1124.0
Japan	905.8	851.5	772.0	600.0	28.8	25.0	20.0	20.0	961.4	1046.0	890.0	1000.0	807.3	859.7	810.0	650.0	2715.2	2692.9	2503.0	2181.0
Korea, Rep. of	209.6	370.6	367.0	220.0	2.2	3.1	5.0	6.0	126.3	156.4	163.0	170.0	149.9	158.0	150.0	140.0	491.7	692.1	680.0	641.0
Saudi Arabia	36.8	66.0	80.0	50.0	46.3	47.0	47.0	47.0	2.8	3.0	3.0	3.0	403.0	395.0	405.0	410.0	488.9	511.4	536.5	511.5
Others	662.3	574.9	675.4	662.6	77.1	79.6	86.5	94.5	169.3	211.0	262.4	290.6	702.2	834.5	901.9	957.0	1620.6	1706.9	1934.5	2013.3
Europe 2/ 4/	1006.4	1216.9	1234.6	1320.5	235.6	238.1	241.3	245.6	785.5	1132.8	1070.0	994.0	2650.0	2682.6	2633.3	2449.3	4975.9	5497.1	5415.6	5247.0
EU (16) 2/	353.0	451.3	470.0	500.0	222.4	223.5	226.0	230.0	64.0	62.3	70.0	72.0	669.0	631.0	750.0	660.0	1568.8	1546.2	1696.0	1642.0
Other West Europe	19.5	25.8	29.0	33.0	8.5	8.9	9.0	9.0	14.6	16.3	20.0	26.0	49.6	48.4	52.3	57.3	106.3	111.7	123.4	136.5
Bulgaria	19.6	27.9	26.0	25.0	0.0	0.0	0.1	0.1	18.4	20.8	28.0	32.0	28.9	29.6	28.0	27.0	67.6	78.4	82.8	84.8
Poland	0.4	1.5	2.0	8.0	0.0	0.1	0.1	0.1	22.4	50.0	35.0	35.0	89.9	99.0	80.0	100.0	112.8	150.6	117.1	143.1
Romania	14.1	8.7	7.0	5.0	0.0	0.0	0.0	0.0	54.1	84.8	65.0	35.0	74.0	91.1	110.0	116.0	142.2	184.6	172.0	156.0
Other East Europe	50.4	73.8	87.2	96.0	1.0	1.3	1.6	1.9	160.0	203.6	244.0	239.0	125.7	157.1	190.0	201.0	341.3	440.6	527.3	542.7
Oceania	42.5	45.7	50.5	47.2	50.7	41.8	46.2	51.0	63.0	80.5	96.5	94.8	36.3	34.8	42.4	43.1	195.3	205.1	238.7	238.3
Australia	4.3	4.3	3.0	2.0	0.3	0.5	1.0	1.0	34.7	48.4	60.0	58.0	1.0	1.3	1.5	1.5	40.7	54.8	65.8	62.8
New Zealand	11.2	16.9	20.0	17.0	3.6	3.0	3.0	3.0	17.0	21.4	25.0	25.0	0.6	1.0	1.0	1.0	32.5	42.5	49.2	46.2
Papua New Guinea	10.7	7.7	10.0	10.0	29.3	21.5	25.0	30.0	1.1	1.0	1.0	1.0	0.1	0.4	0.4	0.4	41.3	31.2	37.1	41.4
CIS (12)	576.2	661.0	657.2	698.3	4.0	4.9	4.8	5.6	437.2	670.6	588.7	522.8	1646.9	1671.0	1485.4	1371.5	2686.8	3037.4	2775.7	2638.8
Russian Federation	535.7	614.8	600.0	640.0	3.4	4.3	4.0	4.0	405.7	640.0	560.0	480.0	1389.8	1380.8	1140.0	1050.0	2342.3	2668.8	2324.0	2204.0
Uzbekistan	5.0	6.0	7.0	8.0	0.0	0.0	0.0	0.0	1.0	1.0	1.0	1.0	22.0	30.0	40.0	50.0	31.0	37.0	49.9	61.2
Other CIS	35.6	40.2	50.2	50.3	0.6	0.6	0.8	1.6	30.5	29.5	37.7	41.8	235.1	260.2	305.4	271.5	313.4	331.6	401.8	373.7
Developed countries 2/	3715.9	3720.5	3756.9	3622.9	386.2	375.1	376.1	384.3	2349.2	2850.1	2712.7	2730.8	3822.3	3969.0	3903.3	3588.5	10596.2	11162.2	11007.3	10587.3
Developing countries	1715.5	2113.5	2229.5	1872.7	302.9	311.6	336.9	358.6	1126.2	1257.6	1472.6	1542.5	3897.7	3874.2	3956.1	3993.8	7133.0	7681.5	8105.6	7881.3

1/ Including Other Meat
2/ Excluding EU (16) intra-trade
3/ Including CIS countries in Asia
4/ Including Baltic States & CIS countries in Europe.

MEAT EXPORTS

	Bovine Meat				Ovine Meat				Pig Meat				Poultry Meat				Total Meat 1/			
	2001	2002	2003	2004	2001	2002	2003	2004	2001	2002	2003	2004	2001	2002	2003	2004	2001	2002	2003	2004
	Thousand tons - CWE				Thousand tons - CWE				Thousand tons - CWE				Thousand tons - CWE				Thousand tons - CWE			
World 2/	5536.9	5947.8	6062.3	5609.0	715.8	699.3	677.2	696.1	3293.8	3809.2	4186.5	4271.3	7843.5	7826.4	7924.8	7587.2	17659.9	18572.7	19123.1	18442.0
Africa	62.3	51.3	47.1	46.3	12.0	15.8	16.9	15.6	2.7	6.0	5.2	6.7	20.4	23.5	24.7	27.5	111.3	131.2	115.8	121.0
Botswana	27.3	13.2	9.0	9.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	27.4	13.3	9.2	9.0
Namibia	25.9	23.3	20.0	18.0	6.6	6.3	6.0	6.0	0.6	0.6	0.6	1.0	0.0	0.1	0.7	0.7	33.7	31.5	28.5	27.1
Others	9.0	14.8	18.1	19.3	5.4	9.5	10.9	9.6	2.1	5.4	4.6	5.7	20.4	23.4	24.0	26.8	50.2	86.4	78.1	84.9
North & Central America	1620.6	1739.5	1577.1	856.2	3.9	3.7	3.5	3.5	1352.2	1491.1	1661.9	1844.5	3285.3	2812.1	2869.4	2599.6	6321.2	6084.6	6149.8	5341.6
Canada	542.3	579.5	375.0	550.0	0.3	0.3	0.4	0.4	859.1	772.5	900.0	975.0	97.5	114.5	100.0	105.0	1314.9	1480.0	1388.4	1643.4
Nicaragua	31.7	46.4	50.0	50.0	0.0	0.0	0.0	0.0	0.2	0.1	0.4	0.5	0.0	0.2	0.5	1.0	32.2	47.4	51.4	52.0
USA	1010.6	1071.9	1105.0	204.0	3.6	3.4	3.0	3.0	628.9	652.6	696.0	788.0	3171.4	2686.9	2767.0	2480.0	4855.3	4436.7	4583.0	3497.0
Others	36.9	41.7	47.1	52.2	0.0	0.0	0.1	0.1	64.0	66.9	65.5	81.1	16.4	10.6	12.0	13.6	116.8	120.4	127.0	149.3
South America	987.6	1282.2	1692.8	1974.2	15.5	12.5	16.6	18.6	331.3	595.8	630.3	435.3	1414.4	1790.1	2196.6	2400.6	2808.7	3753.6	4604.0	4899.1
Argentina	134.6	298.5	320.0	360.0	1.0	2.0	4.7	5.0	0.1	0.1	0.1	0.1	21.1	30.5	60.0	60.0	188.9	366.8	422.8	465.1
Brazil	645.0	767.9	1050.0	1230.0	0.1	0.1	0.1	0.1	297.2	511.4	530.0	320.0	1343.6	1726.3	2100.0	2300.0	2304.6	3014.7	3699.1	3869.1
Uruguay	141.0	204.8	266.0	296.0	9.0	5.8	6.5	7.2	0.0	0.0	0.0	0.0	0.5	0.9	0.0	0.0	167.6	217.6	276.5	307.2
Others	66.9	23.0	57.8	89.2	5.4	4.6	5.3	6.3	34.0	84.3	100.2	115.2	49.2	32.4	36.6	40.6	157.7	154.6	206.6	257.7
Asia 3/	341.2	394.1	449.6	501.4	12.9	13.8	17.9	19.7	351.9	398.0	485.5	589.3	1858.9	1798.2	1685.0	1328.6	2632.2	2679.2	2715.3	2516.8
China, Mainland	52.4	39.0	37.0	39.0	2.9	3.0	4.0	5.0	213.7	290.4	380.0	470.0	580.8	560.3	500.0	425.0	906.0	952.7	986.0	1004.0
India	243.8	298.6	360.0	400.0	3.6	5.0	6.0	7.0	0.8	1.1	1.0	1.0	0.4	2.0	6.0	10.0	248.5	306.8	362.0	418.0
Thailand	4.1	3.4	3.0	3.0	0.0	0.0	0.0	0.0	14.0	16.1	14.0	16.0	511.3	552.0	585.0	326.0	529.4	571.5	602.0	344.0
Others	40.9	53.1	59.6	59.4	6.6	5.9	7.9	7.7	123.5	90.3	90.5	102.3	766.4	683.9	595.0	568.6	948.3	848.2	766.2	750.7
Europe 2/ 4/	809.3	800.8	683.8	611.0	18.6	17.1	16.3	16.6	1199.6	1252.2	1338.0	1330.9	1237.8	1377.1	1120.9	1201.7	3294.5	3476.8	3186.9	3188.0
EU (16) 2/	547.0	480.7	380.0	310.0	3.8	3.4	2.0	2.0	910.7	990.7	985.0	950.0	961.3	1086.8	800.0	850.0	2429.2	2567.8	2173.0	2118.0
Other West Europe	2.2	3.3	4.0	4.0	1.7	2.1	2.5	2.6	2.5	1.7	2.0	2.0	0.3	0.5	0.6	0.6	7.3	8.3	9.9	9.9
Hungary	8.9	9.2	10.0	10.0	1.3	0.2	0.0	0.0	126.9	114.3	115.0	120.0	131.9	134.0	120.0	140.0	274.4	265.0	252.0	277.0
Poland	52.3	88.9	60.0	45.0	0.0	0.1	0.1	0.1	74.9	54.9	140.0	140.0	51.5	44.6	77.0	85.0	188.6	196.5	287.1	280.1
Romania	0.6	0.6	1.0	1.0	0.0	0.0	0.0	0.0	0.9	0.6	1.0	1.0	6.8	5.4	12.0	15.0	9.2	7.6	16.0	16.0
Other East Europe	47.2	36.2	23.7	29.7	4.7	3.3	3.3	3.3	163.1	149.1	156.7	172.6	170.1	172.6	162.3	180.1	385.1	370.4	356.0	394.6
Oceania	1716.0	1679.9	1611.9	1619.9	652.9	636.3	606.0	622.0	56.2	66.1	65.5	64.6	26.7	25.3	28.1	29.1	2492.0	2447.5	2351.3	2375.5
Australia	1266.5	1236.0	1130.0	1128.0	306.5	294.6	250.0	252.0	65.5	65.6	65.0	64.0	25.9	24.2	27.0	28.0	1673.5	1640.4	1492.0	1492.0
New Zealand	449.1	441.4	480.0	490.0	346.4	341.7	356.0	370.0	0.4	0.3	0.3	0.3	0.6	1.0	1.0	1.0	815.6	803.4	856.3	880.3
CIS (12)	167.1	190.5	212.6	218.6	1.3	1.2	1.4	1.7	48.9	37.2	36.0	39.0	11.7	21.1	21.0	23.0	220.2	250.8	271.6	282.9
Russian Federation	6.4	6.6	7.0	7.0	0.4	0.4	0.4	0.4	7.8	7.4	7.0	7.0	3.7	1.3	1.0	1.0	19.0	16.0	15.4	15.4
Ukraine	116.3	142.4	160.0	165.0	0.2	0.3	0.3	0.3	2.9	3.0	7.0	10.0	0.7	3.6	1.0	1.0	120.4	149.6	168.5	176.5
Other CIS	34.4	41.6	45.6	46.6	0.7	0.6	0.7	1.0	38.2	26.8	22.0	22.0	7.3	16.1	19.0	21.0	80.9	85.2	87.7	91.0
Developed countries 2/	4085.3	4139.2	3787.3	3000.6	675.5	657.2	625.8	642.2	2547.9	2746.4	3003.2	3162.1	4554.1	4232.0	4038.9	3848.8	11995.1	11885.0	11563.4	10762.6
Developing countries	1451.6	1808.5	2275.0	2608.4	40.3	42.0	51.4	53.9	745.9	1062.8	1183.3	1109.1	3289.4	3594.4	3885.8	3738.4	5664.8	6687.8	7559.7	7679.5

1/ Including Other Meat
2/ Excluding EU (16) intra-trade
3/ Including CIS countries in Asia
4/ Including Baltic States & CIS countries in Europe.

MEAT CONSUMPTION

	Bovine Meat				Ovine Meat				Pig Meat				Poultry Meat				Total Meat 1/			
	2001	2002	2003	2004	2001	2002	2003	2004	2001	2002	2003	2004	2001	2002	2003	2004	2001	2002	2003	2004
	Million tons - CWE				Million tons - CWE				Million tons - CWE				Million tons - CWE				Million tons - CWE			
World	**58903**	**61201**	**61913**	**61786**	**11427**	**11754**	**12057**	**12446**	**91319**	**94286**	**96210**	**97845**	**71311**	**74473**	**76106**	**77215**	**237865**	**246591**	**250369**	**253626**
Africa	**4571**	**4695**	**4740**	**4817**	**1935**	**1932**	**1951**	**2004**	**780**	**802**	**820**	**829**	**3546**	**3705**	**3795**	**3902**	**12070**	**12390**	**12558**	**12827**
Egypt	647	698	686	696	110	110	109	107	3	3	3	3	647	657	671	686	1539	1598	1604	1629
Nigeria	373	379	383	393	229	239	241	242	165	173	176	180	198	213	220	226	1066	1127	1130	1152
South Africa	597	605	613	597	174	160	163	170	119	119	127	131	880	929	941	969	1781	1826	1857	1870
Others	2954	3018	3058	3133	1423	1422	1438	1485	492	506	514	515	1821	1907	1963	2032	7686	7839	7966	8177
North & Central America	**15692**	**16148**	**15868**	**16212**	**353**	**361**	**366**	**375**	**11259**	**11614**	**11831**	**11967**	**18471**	**19801**	**20198**	**21121**	**46186**	**48409**	**48490**	**49993**
Canada	1001	1008	1138	1110	30	31	32	33	1152	1167	1121	1050	1133	1143	1147	1150	3363	3360	3440	3343
Mexico	1833	1901	1866	1810	124	127	136	142	1262	1298	1364	1405	2354	2515	2612	2744	5704	5977	6118	6241
USA	12288	12688	12296	12715	166	172	167	167	8464	8759	8912	9063	13710	14798	15037	15774	34849	36736	36478	37867
Others	570	551	569	577	33	31	32	33	382	390	434	459	1275	1344	1401	1453	2280	2337	2457	2542
South America	**10750**	**11286**	**11283**	**11115**	**324**	**330**	**336**	**346**	**2695**	**2718**	**2765**	**2931**	**8965**	**9472**	**9301**	**9618**	**23023**	**23961**	**23847**	**24164**
Argentina	2367	2411	2492	2300	59	59	58	58	254	227	261	245	1001	943	924	935	3726	3719	3815	3611
Brazil	6073	6444	6396	6406	114	119	122	124	1697	1589	1570	1730	5048	5603	5288	5635	12906	13661	13384	13806
Colombia	696	676	678	663	13	12	13	13	104	114	113	113	620	664	670	672	1440	1475	1483	1490
Venezuela	426	496	466	476	11	11	12	13	121	127	127	127	874	905	908	918	1422	1541	1512	1536
Others	1199	1262	1253	1252	127	129	132	138	719	662	694	716	1422	1458	1512	1568	3528	3565	3653	3723
Asia 2/	**15381**	**15918**	**16529**	**16416**	**6516**	**6908**	**7158**	**7443**	**51445**	**53524**	**54914**	**56631**	**25761**	**26512**	**27606**	**27362**	**100494**	**104408**	**107549**	**109240**
China, Mainland	5441	5822	6111	6469	2950	3199	3428	3665	41746	43151	44400	45656	12229	12634	13220	13156	63287	66717	68069	69839
India	2637	2808	2812	2660	696	698	701	703	594	611	629	639	1251	1399	1595	1740	5318	5466	5677	5882
Japan	1322	1256	1328	972	27	25	20	20	2158	2269	2129	2289	2037	2068	2043	1846	5637	5607	5491	5167
Korea, Rep	495	565	545	474	5	6	8	9	1013	1047	1295	1348	570	592	572	536	2040	2330	2428	2312
Philippines	381	340	383	400	34	37	39	41	1093	1372	1188	1214	632	675	702	717	2135	2468	2324	2386
Viet Nam	195	201	207	210	5	5	5	5	1486	1642	1790	1890	385	430	470	400	2091	2297	2491	2524
Others	4909	5126	5344	5231	2800	2938	2958	2999	3362	3432	3482	3599	8858	8713	9003	8968	19986	20533	21080	21141
Europe 3/	**11425**	**12192**	**12448**	**12174**	**1594**	**1638**	**1692**	**1709**	**24442**	**25113**	**25327**	**24933**	**13767**	**14137**	**14316**	**14302**	**52903**	**54295**	**54717**	**54206**
EU (15)	6940	7557	7720	7494	1242	1273	1300	1313	16828	17046	17101	16922	8725	8471	8586	8510	35168	35424	35540	35279
Other West Europe	246	263	261	270	47	47	46	46	371	370	373	381	161	159	168	178	842	856	869	900
Hungary	53	47	60	60	8	9	10	10	437	497	455	440	377	388	388	343	888	946	901	862
Poland	239	201	232	263	1	1	1	1	1803	1985	2119	1968	789	909	864	887	2883	3124	3204	3092
Romania	158	164	156	156	52	54	56	58	496	561	636	528	351	426	448	470	1091	1221	1210	1226
Other East Europe	534	486	516	511	87	91	115	115	1503	1359	1420	1377	662	804	928	948	2835	2792	3033	3000
Oceania	**1082**	**959**	**1043**	**1049**	**706**	**586**	**554**	**570**	**494**	**512**	**549**	**551**	**799**	**844**	**888**	**908**	**3063**	**2991**	**3074**	**3067**
Australia	856	764	809	824	422	361	311	319	354	369	401	400	631	664	694	710	2253	2216	2222	2204
New Zealand	179	151	187	174	235	185	200	203	64	68	71	71	116	129	135	140	567	547	604	604
CIS (12)	**4166**	**4457**	**4479**	**4399**	**503**	**515**	**519**	**526**	**3107**	**3393**	**3406**	**3401**	**2821**	**3117**	**3125**	**3132**	**10915**	**11699**	**11734**	**11636**
Developed countries	**28836**	**29883**	**30010**	**29765**	**3004**	**2936**	**2948**	**2991**	**37054**	**38173**	**38398**	**38240**	**32938**	**34563**	**35022**	**35610**	**104041**	**107366**	**107595**	**108073**
Developing countries	**30067**	**31338**	**31903**	**32021**	**8423**	**8818**	**9109**	**9455**	**54265**	**56113**	**57812**	**59606**	**38372**	**39910**	**41084**	**41605**	**133824**	**139225**	**142774**	**145556**

1/ Including Other Meat
2/ Including CIS countries in Asia
3/ Including Baltic States & CIS countries in Europe.

P/C MEAT CONSUMPTION

	Bovine Meat				Ovine Meat				Pig Meat				Poultry Meat				Total Meat 1/			
	2001	2002	2003	2004	2001	2002	2003	2004	2001	2002	2003	2004	2001	2002	2003	2004	2001	2002	2003	2004
	kg per year				kg per year				kg per year				kg per year				kg per year			
World	9.6	9.9	9.9	9.7	1.9	1.9	1.9	2.0	14.9	15.2	15.3	15.4	11.6	12.0	12.1	12.2	38.6	39.8	39.9	39.9
Africa	5.7	5.8	5.7	5.6	2.4	2.4	2.3	2.3	1.0	1.0	1.0	1.0	4.4	4.5	4.5	4.6	15.1	15.2	15.0	15.0
Egypt	9.3	9.8	9.5	9.5	1.6	1.6	1.5	1.5	0.0	0.0	0.0	0.0	9.3	9.3	9.3	9.4	22.1	22.5	22.2	22.2
South Africa	14.6	14.7	14.8	14.3	4.3	3.9	3.9	4.1	2.9	2.9	3.1	3.1	21.6	22.6	22.7	23.0	43.7	44.4	44.9	44.9
Sudan	10.6	10.6	10.4	10.4	8.6	8.3	8.2	8.6	0.0	0.0	0.0	0.0	1.0	1.0	1.0	1.0	22.9	22.6	22.2	22.5
Tunisia	6.4	5.4	6.1	6.3	6.8	5.9	6.0	6.1	0.0	0.0	0.0	0.0	12.1	11.9	11.8	12.3	26.3	24.4	24.8	25.5
North America	42.6	43.6	42.4	43.4	0.6	0.6	0.6	0.6	30.8	31.6	31.7	31.7	47.6	50.7	51.1	53.1	122.5	127.6	126.1	129.3
Canada	31.9	31.6	35.6	34.4	1.0	1.0	1.0	1.0	36.6	36.6	35.0	32.5	36.0	36.1	35.9	35.6	106.7	105.9	107.5	103.6
USA	43.8	44.9	43.2	44.4	0.6	0.6	0.6	0.6	30.2	31.0	31.3	31.6	48.9	52.4	52.9	56.1	124.3	130.0	128.2	132.2
Central America and Carr.,,	13.6	13.7	13.4	12.9	0.9	0.9	0.9	0.9	9.3	9.4	9.9	10.1	20.8	21.6	22.1	22.8	45.3	46.5	47.2	47.7
Dominican Rep.	8.3	8.3	8.6	8.8	0.1	0.1	0.1	0.1	7.5	7.6	8.2	8.4	24.5	21.7	19.9	18.9	40.5	37.8	36.8	36.2
Mexico	18.3	18.7	18.1	17.3	1.2	1.2	1.3	1.4	12.6	12.7	13.2	13.4	23.4	24.7	25.3	26.2	56.8	58.7	59.2	59.6
South America	30.6	31.7	31.3	30.4	0.9	0.9	0.9	0.9	8.3	7.6	7.7	8.0	25.6	26.6	25.8	26.3	65.6	67.3	66.1	66.1
Argentina	62.9	63.5	64.9	59.2	1.6	1.5	1.5	1.5	6.8	6.0	6.6	6.3	26.7	24.8	24.1	24.1	99.4	98.0	99.4	92.9
Brazil	35.3	37.0	36.2	35.9	0.7	0.7	0.7	0.7	9.9	9.1	8.9	9.7	29.3	31.6	30.0	31.0	74.9	78.4	75.6	77.3
Chile	21.6	21.3	22.7	23.2	0.7	0.7	0.7	0.8	17.5	17.2	18.1	17.9	23.7	22.5	23.0	23.4	64.1	61.8	64.9	65.6
Uruguay	52.4	52.0	52.5	49.2	12.5	12.5	12.8	13.1	9.6	8.0	8.2	9.6	16.0	15.8	16.2	16.3	90.7	98.7	90.8	89.4
Asia 2/	3.9	4.0	4.1	4.0	1.7	1.8	1.8	1.9	13.9	14.3	14.5	14.8	7.0	7.1	7.3	7.1	26.8	27.5	28.0	28.1
China , Mainland	4.3	4.6	4.8	5.0	2.3	2.5	2.7	2.8	33.0	33.8	34.6	35.3	9.7	9.9	10.3	10.2	50.0	51.5	53.0	54.0
China, Province of Taiwan	3.6	4.0	4.2	3.5	1.1	1.3	1.5	1.6	43.3	42.2	42.0	42.8	31.9	32.5	32.7	32.3	79.8	80.0	80.4	80.1
Japan	10.4	9.9	10.4	7.6	0.2	0.2	0.2	0.2	17.0	17.9	16.7	18.0	16.0	16.3	16.1	14.5	44.4	44.1	43.2	40.5
Korea, Rep.	10.5	11.9	11.4	9.8	0.1	0.1	0.2	0.2	21.6	22.0	27.0	27.9	12.1	12.5	11.9	11.1	43.2	49.0	50.7	47.9
Malaysia	6.3	6.5	6.8	7.0	0.7	0.8	0.7	0.8	8.2	9.8	8.7	8.8	36.0	38.1	39.8	39.4	51.3	55.0	56.1	56.0
West Europe	18.5	20.1	20.5	20.0	3.3	3.4	3.5	3.5	44.3	44.8	44.9	44.5	22.9	22.2	22.5	22.3	92.7	93.4	93.6	93.0
EU (15)	18.5	20.1	20.5	19.9	3.3	3.4	3.5	3.5	44.8	45.3	45.5	45.0	23.2	22.5	22.8	22.6	93.6	94.2	94.5	93.7
East Europe	8.9	8.1	8.7	8.9	1.3	1.4	1.6	1.7	38.4	39.9	41.0	39.1	19.7	22.9	23.6	24.0	69.5	73.2	75.6	74.1
Czech, Rep.	7.3	9.3	10.4	9.3	0.1	0.1	0.1	0.2	41.2	41.7	42.1	40.8	23.7	32.1	31.8	31.1	76.7	86.7	88.1	86.0
Hungary	5.3	4.7	6.0	6.1	0.8	0.9	1.0	1.0	43.7	49.9	45.9	44.5	37.7	38.8	37.1	34.7	88.9	95.0	90.9	87.2
Poland	6.2	5.2	6.0	6.6	0.0	0.0	0.0	0.0	46.5	51.1	54.5	50.8	20.3	23.4	22.2	22.8	73.8	80.5	82.4	79.5
Romania	7.1	7.4	7.1	7.1	2.3	2.5	2.5	2.6	22.4	25.3	24.3	24.0	15.8	19.2	20.3	21.3	49.0	55.1	54.8	55.6
Oceania	35.5	31.1	33.5	33.3	23.2	19.0	17.8	18.1	16.2	16.6	17.6	17.5	26.3	27.4	28.5	28.8	100.6	97.1	98.6	97.2
Australia	44.9	39.7	41.7	42.1	22.2	18.7	16.0	16.3	16.6	19.2	20.7	20.4	33.1	34.5	35.8	36.2	118.2	115.2	114.4	112.5
New Zealand	46.0	38.5	47.1	43.5	60.3	47.1	50.3	50.7	16.3	17.2	17.8	17.7	29.7	32.8	34.0	35.0	145.4	139.1	152.4	150.9
CIS (12)	14.7	15.7	15.7	15.5	1.8	1.8	1.8	1.8	10.9	11.9	12.0	11.9	9.9	11.0	11.0	11.0	38.4	41.2	41.3	40.9
Developed countries	22.2	22.9	23.0	22.7	2.3	2.3	2.3	2.3	28.5	29.3	29.4	29.2	25.4	26.5	26.8	27.2	80.1	82.4	82.4	82.5
Developing countries	6.2	6.4	6.4	6.3	1.7	1.8	1.8	1.9	11.2	11.5	11.6	11.8	7.9	8.1	8.3	8.2	27.7	28.4	28.7	28.9

1/ Including Other Meat
2/ Excluding CIS countries in Asia

The IMS Beef Committee

The Short Term Market Prospects for African Beef (for the next 12-24 months) within the context of the point in the agenda dealing with beef prospects for the various regions of the world.

By: Ove Kjær Nielsen, Botswana Meat Commission.

The Short Term Market Prospects for African Beef is determined by a number of factors most of which are beyond our control. Major factors that affect the market prospects for beef from Southern Africa are availability that to a large extent is determined by rainfall or lack of it, the new EU trace-ability laws, the use or non-use of growth hormones and especially the rates of foreign exchange. Other factors are animal deceases, and here I must emphasise that in some areas there are large herds of African Buffalo's that are carrier of F&M. This makes vaccination of bovines in surrounding areas necessary with the result that large parts of the Beef production become un-acceptable for Export. These factors together with land reforms – lower production, and farms turned into game farms or catering for tourism are all major factors that has influence on the short Term Market Prospects for African beef and the ability to maintain export status.

Other factors that influence the prospects of marketing beef from Africa are nationalistic tendencies in the Importing countries. These initially emerged because of fears of BSE, but later in some countries have been used as an excuse for a policy of buying only locally produced beef claiming that the consumers do not trust beef produced outside own borders in spite of the facts that it is produced under strict veterinary control in conformity with the EU third country veterinary regulations.

One other factor is the general perception in Europe that Africa is a country NOT a Continent. This perception aided by the media can turn the buying public in Europe against buying beef from any country in Africa.

If for example starvation exist in some country in a far away corner of the Continent, then this would have a major impact on sales from Africa generally as the consumer feels that it would be wrong to buy beef from what is now seen as a starving Continent not an individual country without realizing that the distance from eg Ethiopia to Botswana or Namibia is some 5000 kilometres. The same adverse effect on sales are often caused by media attention is deceases such as Aids.

Finally what the effect will be of the opening up of world trade and reduction of farm subsidies if and when the World Trade Organisation enforces trade regulations that could have a major impact on sales. This could however also cause a potential negative impact on the exports of African beef – because of conception, even if wrong, that the reduction in farm subsidies will lower production in the EU and therefore create more opportunities for imports into the EU for beef including beef from Africa

In the Southern African region there are 5 Beef producing Countries, namely The Republic of South Africa, The Republic of Botswana, The Republic of Namibia, The Kingdom of Swaziland and the Republic of Zimbabwe.

Off these five The Republic of South Africa is a net importer of Beef whilst the other four are net exporters. I will therefore concentrate my remarks on the four net exporters and here leave out the Republic of Zimbabwe as this country for various reasons are not exporting Beef at present.

The cattle population in the other three countries are in total around 5 million and the off-take is between 11% - 14% meaning that a total of some 700,000 cattle are available for sale every year. Because of climatic conditions and different farming management the Cold Dressed Mass vary between the countries and in Namibia the CDM is the highest around 240 kilo and in Botswana the lowest with a CDM around 198 kilo.

In Botswana all cattle for export are processed by the Botswana Meat Commission,
In total app 175,000 cattle with a total de-boned mass of app. 25,000 tonnes.

In Namibia all cattle for export are processed by The Meat Corporation of Namibia,
In total app 150,000 cattle with a total de-boned mass of app 27,000 tonnes and

In Swaziland all cattle for export are processed by Swaziland Meat Industries,
In total app 45,000 cattle with a total de-boned mass of app 6,000 tonnes.

These tonnages viewed against huge production figures like in Brazil are of course small but the production of Cattle in all three countries has always been and remain an extremely important source of foreign exchange income for the countries and in particular is the mainstay of the income of a large part of the population and is the backbone of agricultural activities in Southern Africa besides being extremely important to job creation –

All sales in Europe are handled jointly through Allied Meat Importers a subsidiary Group of companies incorporating Cold Stores in UK and South Africa, Marketing offices in the UK, Germany and Holland and an in-house Captive Insurance Company, all fully owned by the Botswana Meat Commission.

With a human population in the three countries of a total of only app 5 million it is obvious that beef from cattle offered for sales has to find Export markets as the internal consumption is too small to consume what is produced, and in spite of the fact that all three countries are in a Custom Union with The Republic of South Africa, that is a net IMPORTER of Beef, and South Africa therefore so to speak is a local market, sales are low as the competition from Countries such as Brazil, Argentina and Australia with their low prices that are difficult to compete with makes sales difficult in the RSA market for Botswana, Namibia and Swaziland.

Other factors that makes sales into the Republic of South Africa difficult are that the South African Farmers continue to be allowed to use growth promoters/hormones in their production process, they have access to cheaper feed and their slaughterhouses/abattoirs do not need to be ISO/HACCP/export status and are therefore "cheaper" to operate.

The only viable alternative for the three countries therefore has for the last 30 years been and still is Exports under the ACP Beef protocol of the Lomé Agreement, succeeded by the Cotonou Agreement that continue to allow import into the EU from the ACP beef producing countries of a total of 52,100 tonne annually up until year 2008. These imports are allowed duty fee but with payment of 8% levy.

The ACP Beef Quota has never in its time of existence been fully utilised for various reasons like drought and the occasional outbreak in certain areas of F& M and lately also caused by delays and difficulties in implementing the EU trace-ability laws. For example in 2003 only a total of 19,000 tonnes or 37% of the quota was used with exports from Zimbabwe, Madagascar and Kenya (the other three ACP Beef producing countries) being NIL.

The prospect for the short term as well as the long term is therefore pretty bleak. The expenses of marketing beef in markets 10,000 kilometre away are high and ever increasing and the world market prices have stayed low and static for years and returns has only been helped by increases in rates of exchange from Sterling and Euro to the Botswana Pula, the Namibia Dollar and the Swaziland Lilangeni. In spite of the fact that there recently seem to be movements in the prices upwards for beef in the world we believe that this situation will continue.

The difficulties and the costs in implementing and adhering to veterinary conditions and trace-ability rules, that seems to act more as trade barriers than health assurance schemes, makes it extremely difficult for us to see even the slightest silver lining. It would be commendable if more workable rules and regulations were put in place. Some of the present regulations are made in such an academic and theoretical way that it will simply become financial impossible to adhere to these and in countries that produce more Beef than the population can consume this will spell both financial and political disaster.

All of this together with the uncertainty in regard to the future after 2008 does also not make beef ranching in Africa for Export attractive and many farmers will go out of business or be forced to look to alternative income from game farming and or tourism.

In conclusion therefore we in our region take a dim view of the future, we cannot see that beef prices, although rising, will rise enough to counter the production and marketing expenses and without a crystal ball that will predict the rates of exchange of the Sterling and the Euro to our local currencies. and in spite of the fact the world consumer wishes and likes to buy beef, the availability of funds from the consumers constantly shrinking budget will in my view continue to be a barrier against viability in the Beef Production Sector for years to come and in particular

The Short Term Market Prospects for African Beef.

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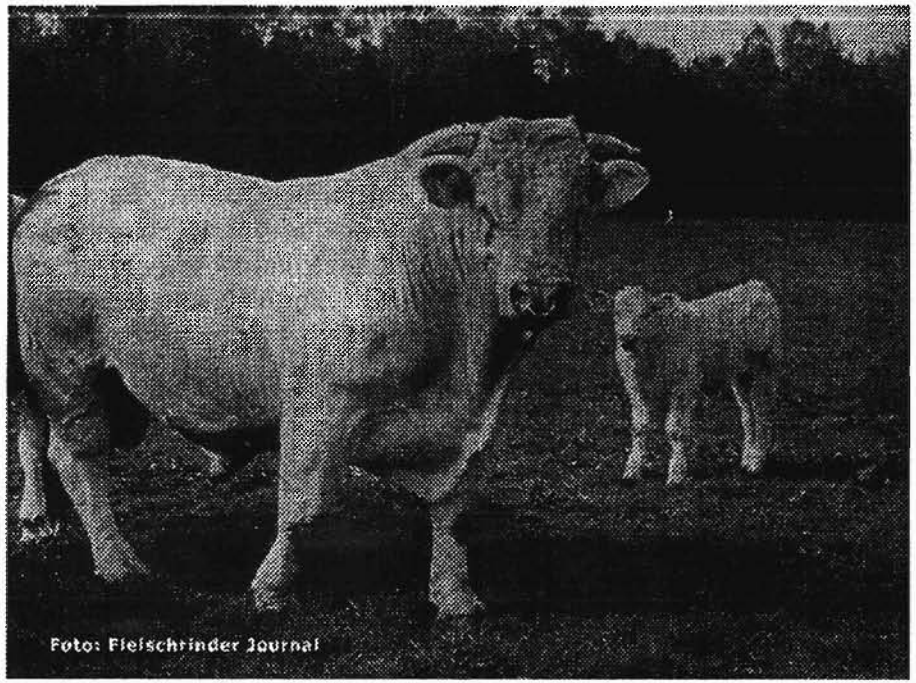


Beef Committee Meeting

Jean-Luc Mériaux

Winnipeg, 14 June 2004

IMS

Beef Committee Meeting

Jean-Luc Mériaux

Winnipeg, 14 June 2004

EU15 Beef Production

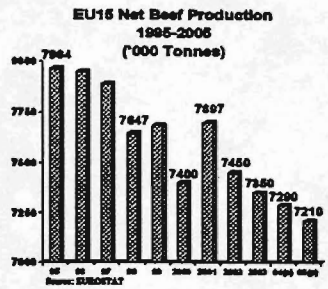
In 2004:

Production slightly lower (-0.8%)

France ⇩

Germany, Italy and Spain ⇧

In 2005: ?



Winnipeg, 2004

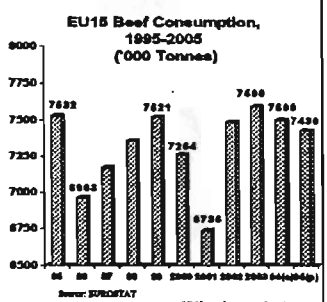
EU15 Beef Consumption

In 2003:

- ✓ good recovery
- ✓ Highest level since 1995

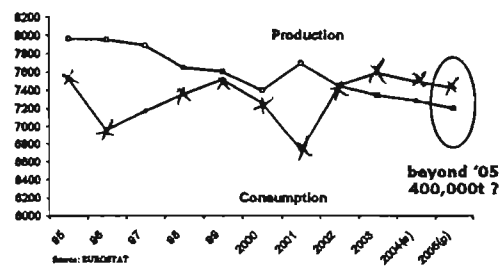
In 2004, a fall is expected:

- ✓ Weakness of the economy
- ✓ Decrease of production
- ✓ Increase in prices



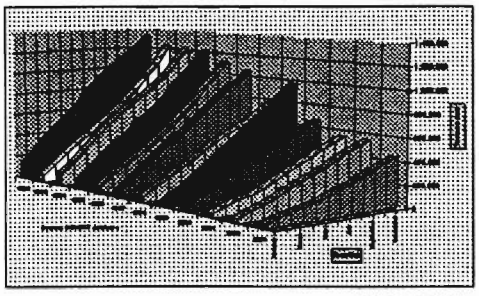
Winnipeg, 2004

Growing Deficit in EU15 Beef Production



Winnipeg, 2004

Result is falling EU15 Exports ... (1)



Winnipeg, 2004

Result is falling EU15 Exports ... (2)

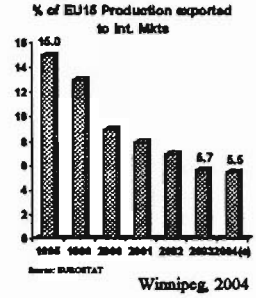
In 2003: fall by 20 %

In 2004: fall by 4 %

Livestock steady

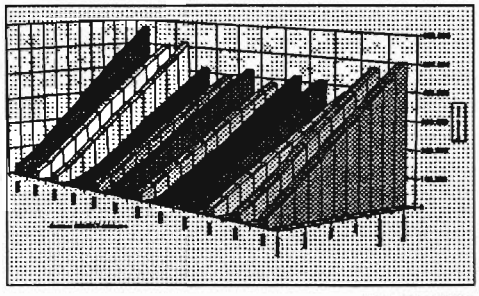
Beef exports affected by:

- ✓ South American competition
- ✓ Lower EU availability
- ✓ Stronger Euro



Winnipeg, 2004

... and rising EU15 Imports (1)



Winnipeg, 2004

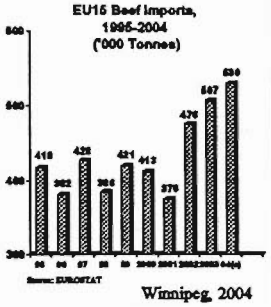
... and rising EU15 Imports (2)

Up 20% since 1999 to 507,000 t in 2003:

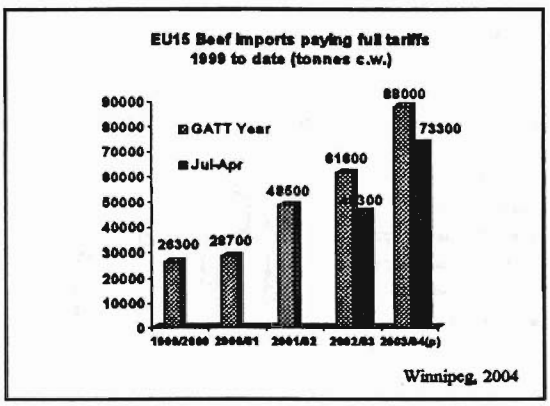
livestock up 18% beef up 5,5%

And up 4,5% in 2003/2004

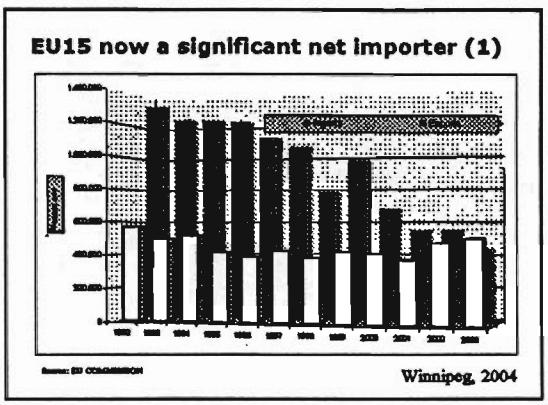
Strong rise in volumes paying full duties



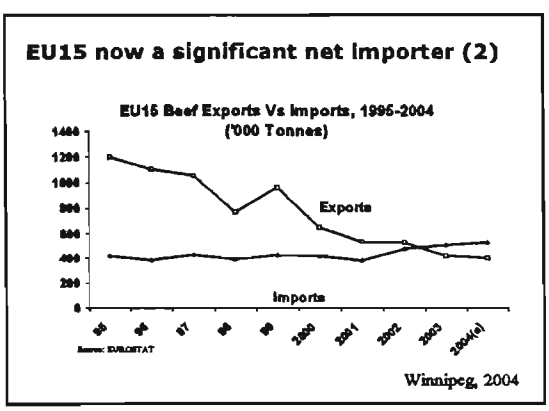
Winnipeg, 2004



Winnipeg, 2004



Winnipeg, 2004

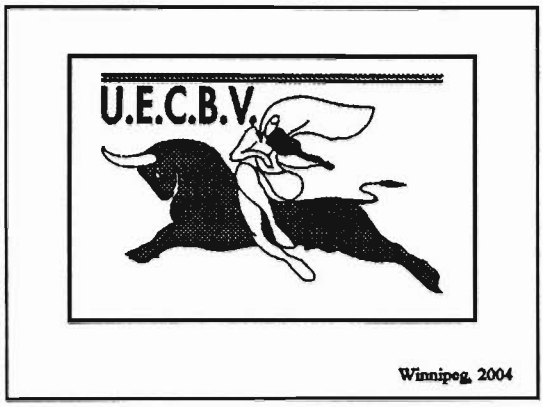


Winnipeg, 2004

Perspectives & Challenges

- EU ENLARGEMENT: 1st OF MAY 2004
- IMPLEMENTATION OF THE CAP REFORM, FROM 2005 ONWARDS
- CHANGE IN THE OVER THIRTY MONTHS SCHEME IN THE UK (2005?)
- NEGOTIATIONS ON THE MERCOSUR AGREEMENT (2006?)
- NEGOTIATIONS ON THE DOHA TRADE ROUND (?)

Winnipeg, 2004


U.E.C.B.V.
Winnipeg, 2004

North American Beef Market Outlook

Barry L. Carpenter

Deputy Administrator

Livestock & Seed Program

Agricultural Marketing Service

United States Department of Agriculture

North American Beef Market Outlook

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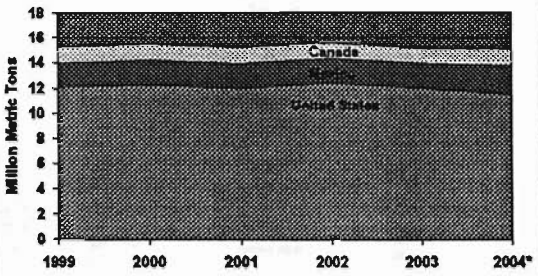
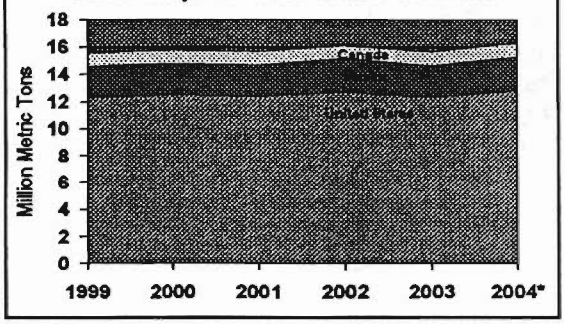
USDA

North American Beef Production Restrained...

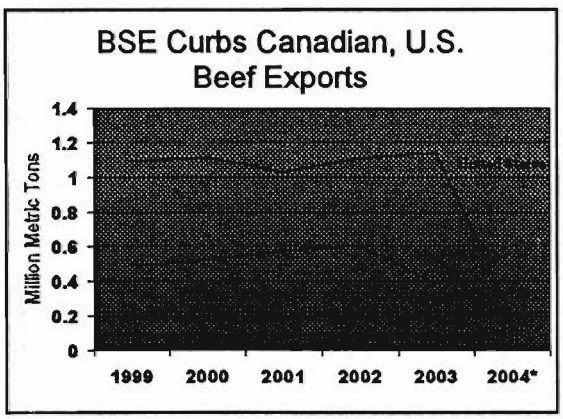


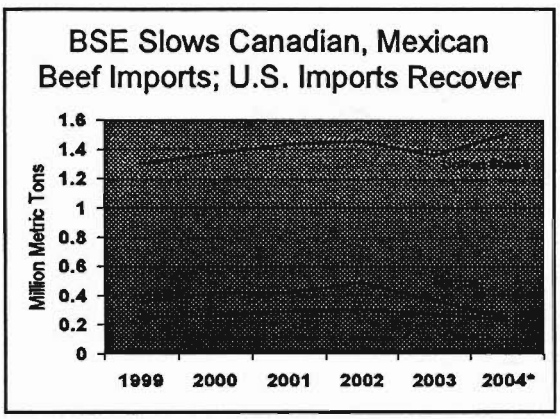
...While North American Beef Consumption Resumes Growth



Watershed Events of 2003 Continue to Shape North American Beef Markets

- *May 20, 2003* – Discovery of Bovine Spongiform Encephalopathy (BSE) in Alberta, Canada
- *December 23, 2003* – Discovery of BSE in Washington, U.S.A.



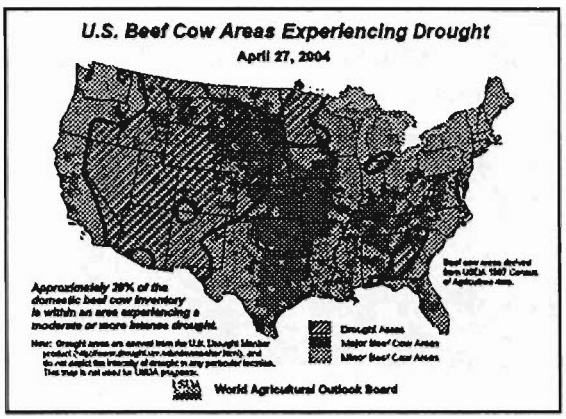


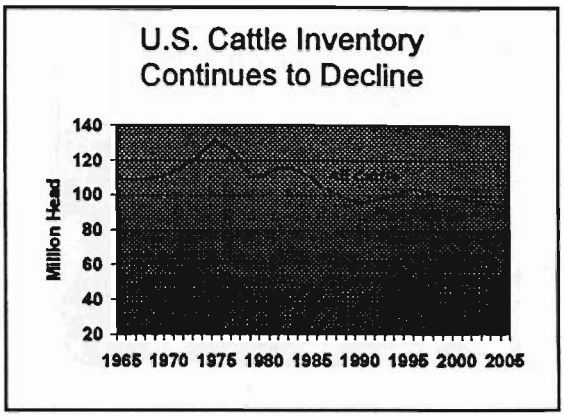
Policy Environment

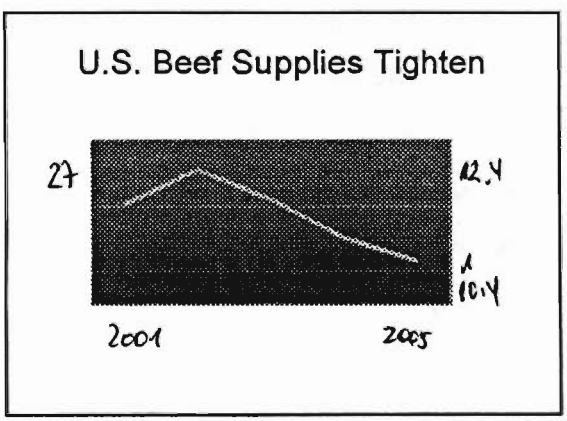
- Industry and policy adjusting to BSE
  - Additional steps to ensure food safety
  - Re-opening of international markets for Canada & U.S.
  - Accelerated development of National Animal Identification System in U.S.
- U.S. mandatory country-of-origin labeling
  - Begins September 30, 2006 for beef
  - Continues to be debated in Congress

U.S. Market Highlights

- Domestic supplies remain tight
- Beef cow herd rebuilding prolonged by persistent drought
- Feed grain prices high, but expected to moderate with good 2004/5 crop
- Domestic demand remains strong
- Prices remain strong
- Forecasts contingent on trade developments



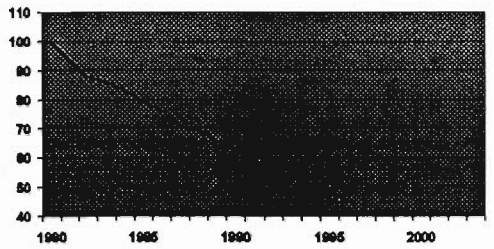




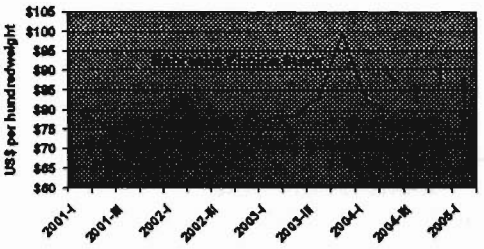
U.S. Beef Demand Remains Strong

- U.S. demand at a 10-year high
- Demand up 15% in the past 5 years
- 1,600 new products developed in the past 5 years
- Consumer confidence was at 89% on December 30, 2003
- High-protein, low-carbohydrate diets appear to be an important factor

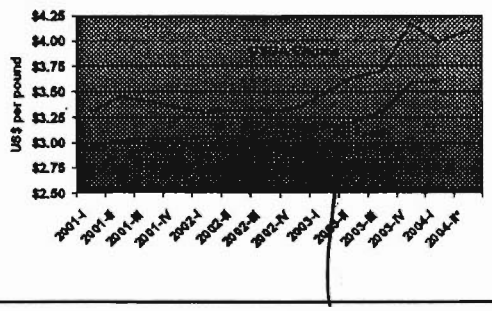
U.S. Beef Demand Index Continues Recovery



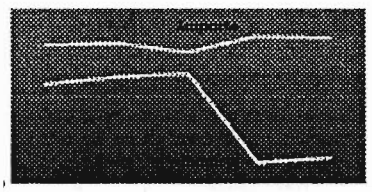
U.S. Cattle Prices Remain Historically High



U.S. Retail Beef Prices Remain High



U.S. Beef Trade Altered by BSE



U.S. Beef Exports

- Bovine Export Verification program provides assurance to importers
- Trade restrictions partially lifted with Canada and Mexico
- Negotiations with other countries continue

U.S. Beef Imports

- U.S. imports lean beef to blend with domestic trimmings for ground beef
- Australia, New Zealand and Canada continue as major sources

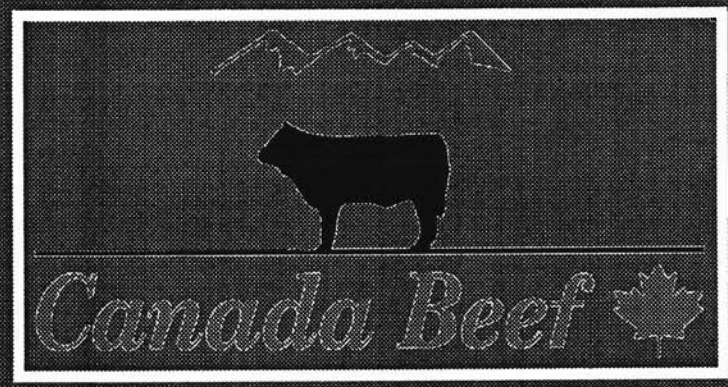
For More Information...

Barry.Carpenter@usda.gov

USDA Agricultural Marketing Service on the Web:
http://www.ams.usda.gov

Presentation to

2004 World Meat Congress



by

Ben Thorlakson
Chairman
Canada Beef Export Federation

Presentation to

2004 World Meat Congress

by
Ben Thorlakson
Chairman
Canada Beef Export Federation

The Devastating Impact of BSE

Canadian industry's dependence on trade:

- **Canada positioned as 3rd largest exporter of beef and cattle in the world**
- **2002 - nearly 60% of Canada's beef production went to exports**

May 20 – BSE
Immediate suspension of trade

Canada's dependency on trade

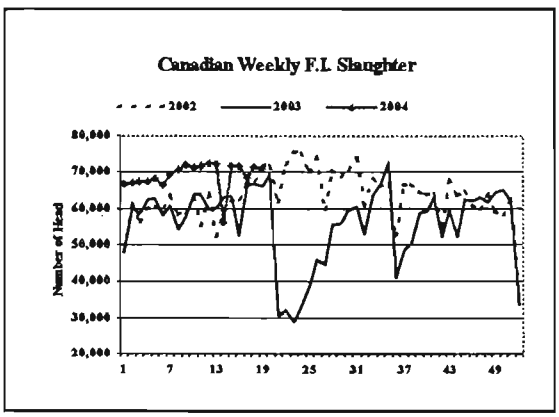
- Since mid-1980s, Canada has become increasingly dependent on slaughter capacity in US

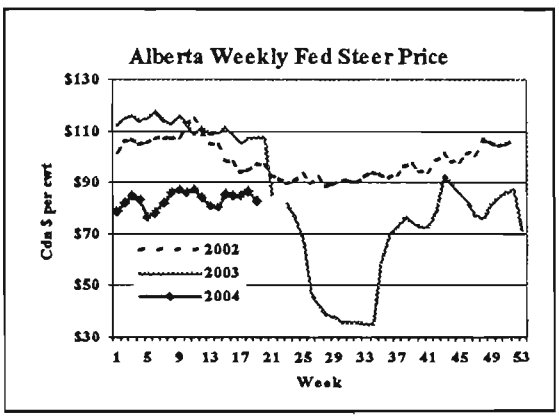
- Until May 20, surplus production was processed in the US
- Annual export of approx. 1 million live cattle to US
- Suspension of trade caused major imbalance
- Canada's cattle supply exceeded its slaughter capacity

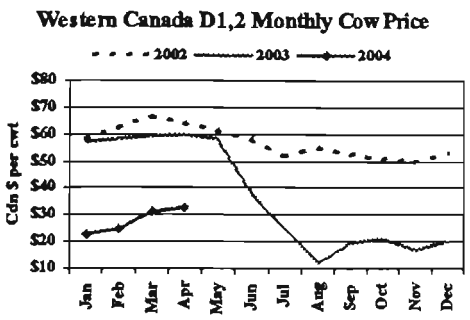
Economic Impact of BSE:

- Economists estimate current direct loss to Canadian cattle and beef industry is

$2.1 billion







Canada's BSE-Protection Actions

- 1978 - Ban importation of MBM from Europe
- 1989 - Ban importation of live breeding cattle from Europe
- 1990 - Classify BSE as official "Reportable Disease", begin Passive Surveillance on all European cattle living in Canada

Canada's BSE-Protection Actions

- 1992 – Active surveillance within the known risk population of cattle
- 1993 – Diagnosis of a BSE cow originally imported from UK
- 1994 – Removal of all remaining European cattle residing in Canada - and destroying and testing of all herd mates & offspring of the index animal

Canada's BSE-Protection Actions

- 1996 - Ban feeding of chicken litter & restaurant waste to cattle
- 1997 – Implemented Mandatory Ruminant Feed Ban
- 1998 – Submit to European (GBR) Risk Assessment Process: Minimal Class 2 Risk

Canada's BSE-Protection Actions

- ❖2000 – Submit to Canadian & American Risk Assessments: Minimal Risk
- ❖2001 – Ban air-injection stunning
- ❖2001 – Implement National Cattle Identification/Traceback System

Canada's BSE-Protection Actions

- ❖2003 – Diagnosis of BSE in a Canadian-born cow (born before the ruminant feed ban)
- ❖2003 – Mandatory CNS testing for mechanically deboned beef
- ❖2003 – SRM removal policy from the human food system

Canada's BSE-Protection Actions

- ❖2004 – Enhanced National Cattle Identification System
- ❖2004 – Enhanced BSE Surveillance with OIE Guidance

Possible route by which BSE came to Canada

- 182 live cattle imported from UK between 1981 and 1989
- Prior to 1993, 68 either slaughtered or died on farm
- 10 from farms in UK that had a case of BSE
- Total level of BSE risk was very small – was halted in 1989 – and was blocked in 1997

Despite:

➢Canada's Minimal Risk for BSE status

➢OIE guidelines which encourage continued trade in safe products

ALL MAJOR INTERNAIONAL MARKETS FOR CANADIAN BEEF CLOSED

OIE Developments

- **establishing criteria for Risk-Assessment-based approach to replace country classification based on incidences of BSE**
- **acknowledges countries' risk mitigation measures and levels of BSE surveillance**
- **categorizes risk levels associated with trade from countries with varying levels of BSE risk**

All countries espouse the principal that trade decisions should be based on science – but reality has proven otherwise.

Canadian Consumer Confidence

❖Canada is first country to see beef consumption increase following a BSE incident

❖Turning point for the world

Canadian Public Response

- Rallies in support of industry were held across the country
- Beef was consumed and purchased in significant quantities
- Public began to feel angry that Canadian beef was being banned on basis of political intervention

- Consumer confidence testament to transparency and professional communication by government and industry

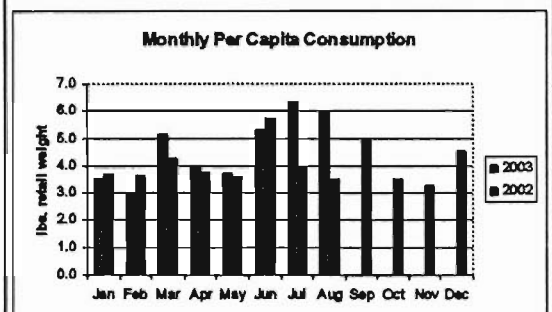
Canadian consumer confidence records highest levels in history of a country detecting BSE

- 88% trust CFIA
- 86% said Canadian Beef was safe to eat
- 85% trust CCA
- 84% trust cattle producers
- 65% stated they would buy more beef if it would help Canadian beef farmers

No other country in the history of BSE has experienced a subsequent increase in beef consumption.

Transparent and factual communications empower people to make appropriate decisions.

Canadian beef consumption jump 60% and 70% in July & August



- Jump in consumer consumption occurred following:
  - CFIA investigation
  - Implementation of Specified Risk Materials policy

With restored market access, we believe international consumers will openly receive Canadian beef

- **Mexico – a case in point: export volumes to Mexico recovered to pre-BSE levels – and reached new highs**
- **exports going to the Philippines and Macau**
- **approximately 23 international markets have resumed trade in Canadian beef**

"I look forward to the confident resumption in trade of safe Canadian beef products throughout the world."

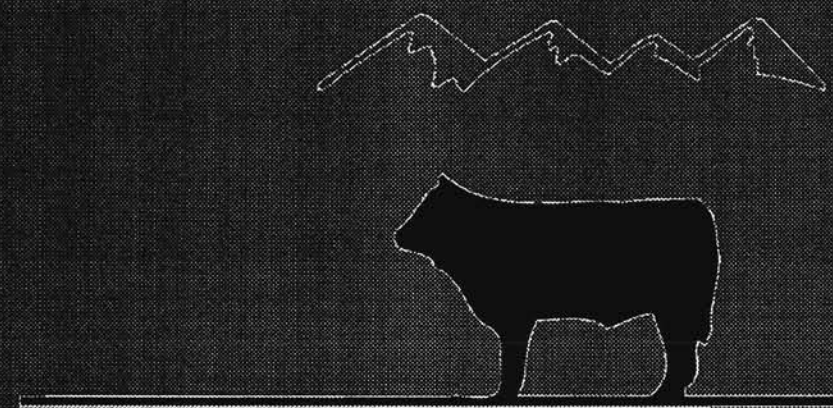
Ben Thorlakson
Chairman
Canada Beef Export Federation

Ben Thorlakson

Chairman

Canada Beef Export Federation

Canada Beef



Canada Beef

- End -

Short term market prospects

An Oceania perspective

International Meat Secretariat
Beef Committee Meeting
Winnipeg, Canada
14 June 2004

Mr Mark Spurr

Managing Director

MLA

Short term market prospects

An Oceania perspective

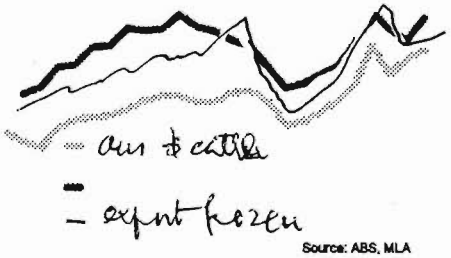
International Meat Secretariat
Beef Committee Meeting
Winnipeg, Canada
14 June 2004

Mr Mark Spurr
Managing Director
MLA

Short term Australian and global outlook

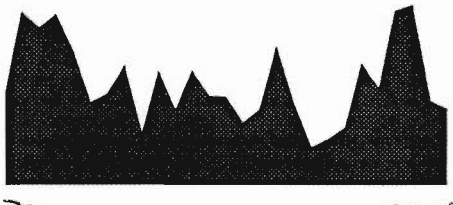
- High cattle and beef prices supported by resurgence in beef demand
- ... but trade suspensions on US beef to cause major short term trade volatility
- Australia's severe drought to impair supplies
- Need for global cooperation to expand beef consumers and trade

Australian and Pacific Basin beef trade prices high



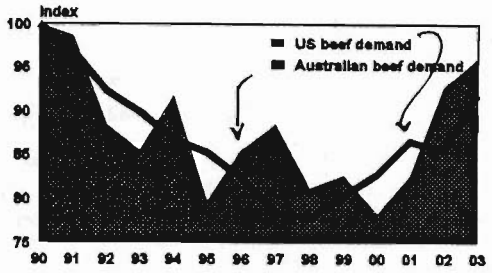
Source: ABS, MLA

Australian beef farm incomes high until drought



Source: ABARE

Extraordinary: Australians and Americans come back to beef



Source: MLA, USDA

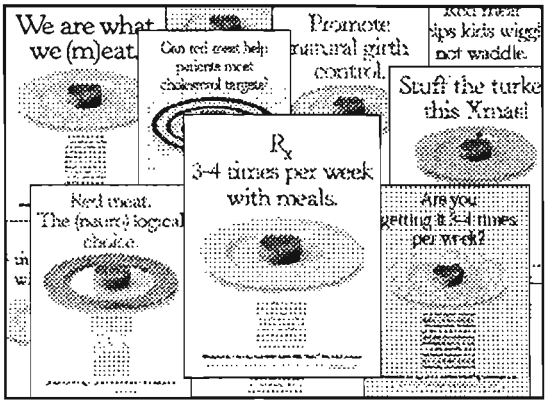
Scientific research has turned the tables

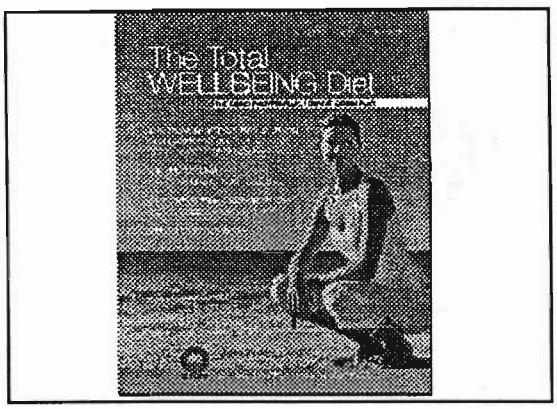
Endorsed or incorporated by

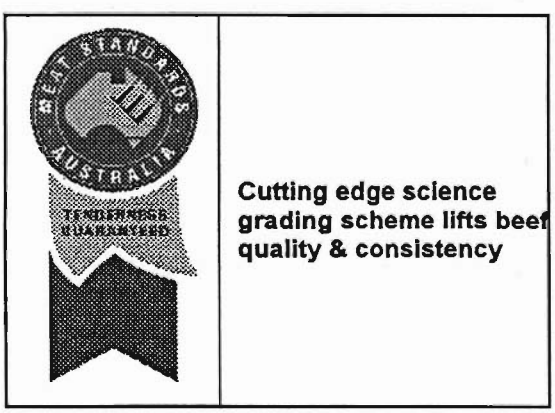
- C'wealth Dept of Health
- Heart Foundation
- Dietitians Association
- Australian Cancer Society
- National Health & Medical Research Council

www.meat4health.com.au

RED MEAT.
Feel good.

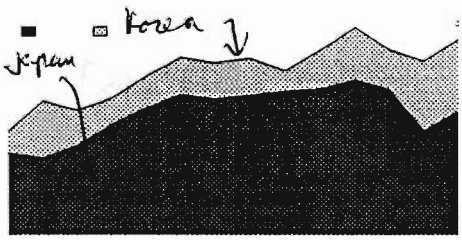




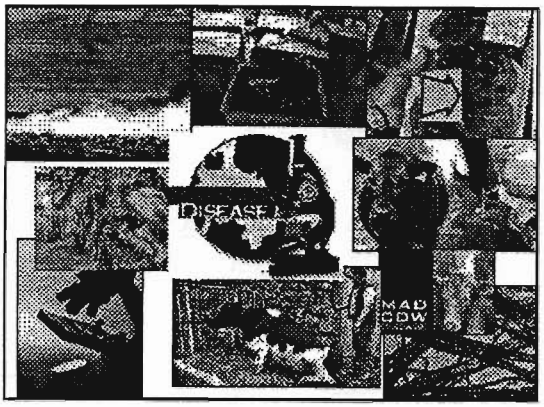


Cutting edge science grading scheme lifts beef quality & consistency

Rising North Asian beef import demand

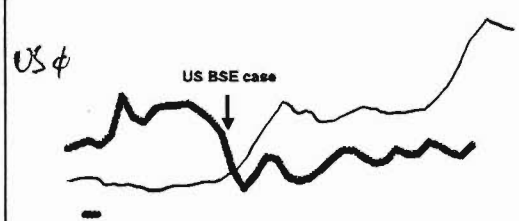


Source: Japan Ministry of Finance, KOTIS



US BSE:
The biggest shock to ever hit world beef markets

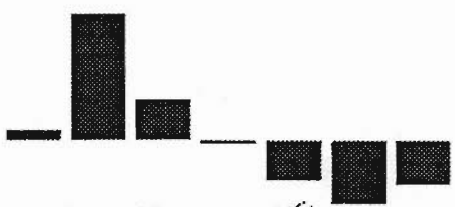
US BSE shocks world markets



Source: Chikusan Nippo, Steiner

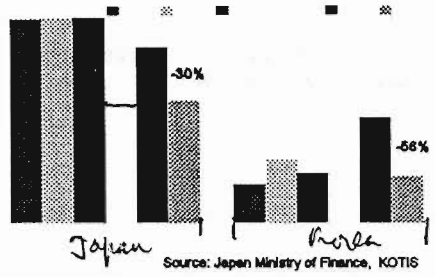
US absence shifts trade flows

Change in Australian beef exports



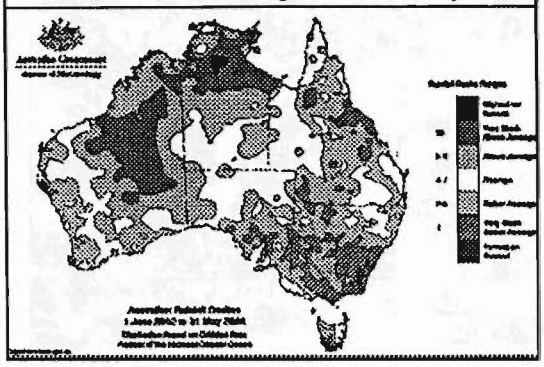
Source: DAFF

But ultimate impact is a loss of beef customers:
Japan and Korea beef imports fall sharply

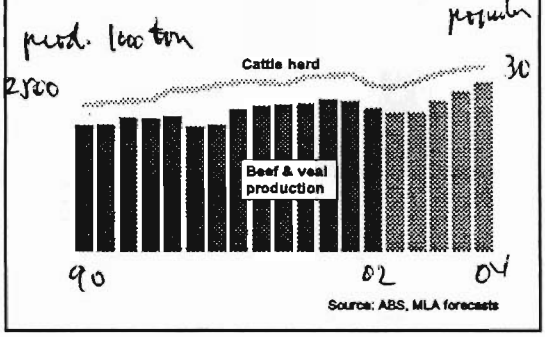


Source: Japan Ministry of Finance, KOTIS

Australia's severe drought enters third year



Drought impacts on Australian supply



Source: ABS, MLA forecasts

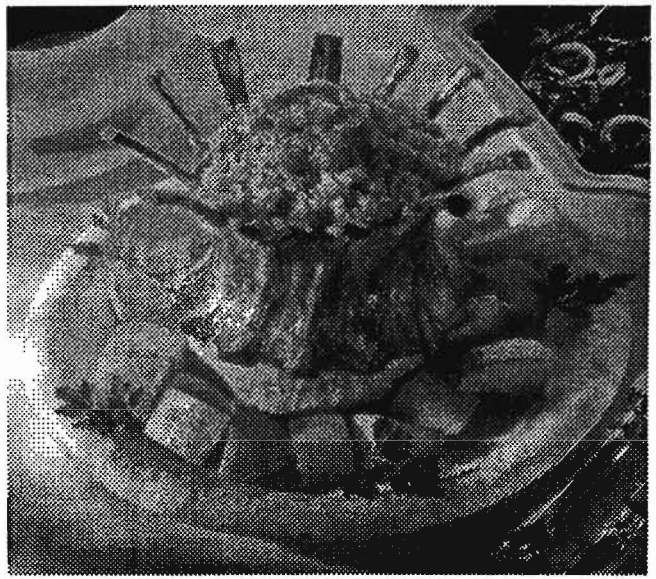
Need for global cooperation to expand beef consumers and trade

animal disease.

- Border controls to be based on science
- Successful outcome of WTO Round vital
- Japan snapback needs to be suspended for US re-entry
- Global nutritional health promotions

Bob Bansback

World Meat Congress
Winnipeg
2004



Bob Bansback

World Meat Congress
Winnipeg
2004

EBLEX Marketing Activity

Launched 23 April 2003

St Georges Day!!!!

Great Britain Lamb Promotion

- Impact of Devolution
- Separate Campaigns for England, Scotland and Wales
- Market Research, Consumer Education and other functions carried out centrally

What is the Tuck-in Campaign?

- The first EBLEX marketing activity
- Fully integrated campaign built around a strong consumer PR proposition
- Designed to drive media coverage of lamb
- Associate with "quintessentially" English qualities

How was it structured?

- Central component - the "Tuck-in" quarterly magazine underpinned by a celebrity driven PR activity
- Attractive Point of Sale material for independents
- Options for multiple retailers
- Driven into the trade using strong communications programme

Consumer PR Evaluation to date

• **Reach**	**102,557,737**
• **Coverage Value**	**£5,613,492**
• **Cost**	**£369,597**
• **Cost/Value Ratio**	**1:15**

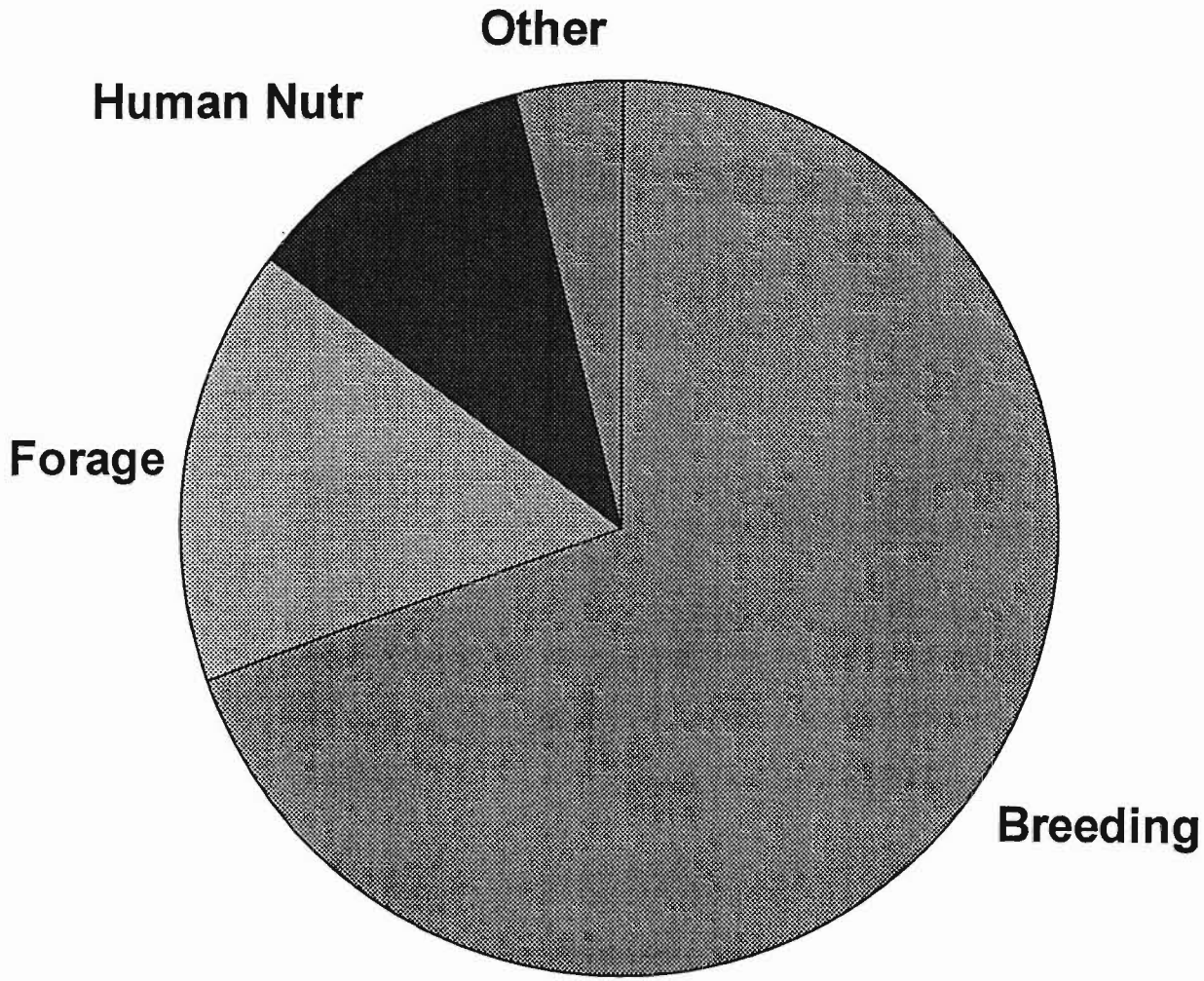
Why did we need it?

- To launch EBLEX marketing programme
- To position lamb at the heart of English cookery
- To encourage consideration of origin
- To build positive associations with English traditions
- To build a presence within key media

Current Research

- Breeding improvement of terminal sire breeds
- Connectedness measures in breed evaluations
- Improving Mules (An index for longwool breeds)
- Molecular Genetics in sheep breeding
- High Sugar Ryegrass
- VIA for lamb carcases
- Effects of MAP on maturation
- Iron Status and Meat consumption in women
- Meat protein to enhance satiety

£ Spend by subject area



Asia Pacific Beef Market Update

JUNE 2004

Joel Haggard
Vice President, Asia Pacific Region

U.S. Meat Export Federation

Asia Pacific Beef Market Update

JUNE 2004

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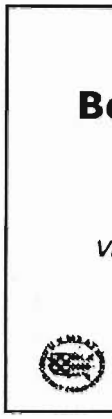
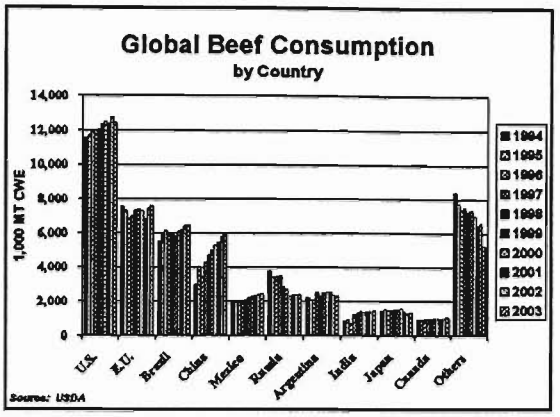
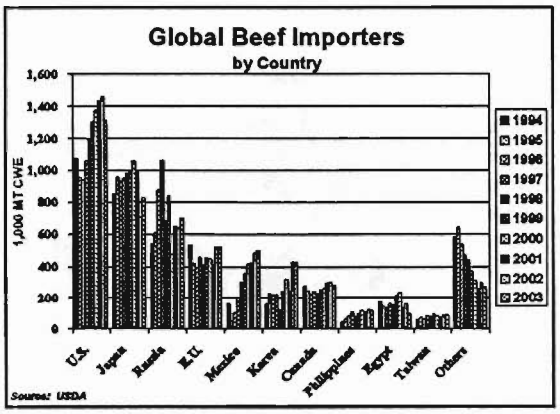
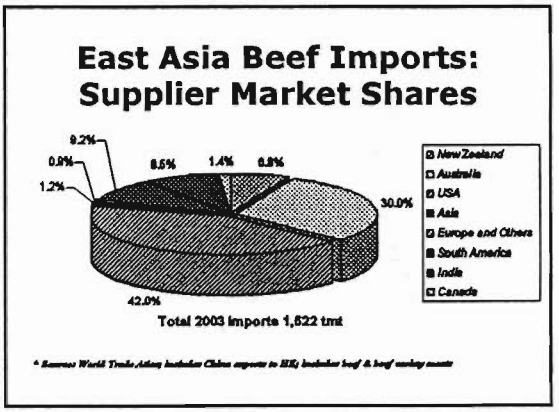
U.S. Meat Export Federation









Intra-Asia Live Cattle Trade

Australia	→	Indonesia, Pl, Malaysia	(584,000 hd.)
Myanmar	→	Thailand	(72,176 hd.)
China	→	Hong Kong	(50,635 hd.)
Thailand	→	Malaysia	(>100,000 hd.??)

Current Access Status of US Beef in East Asia

~~CLOSED~~

Japan
Korea
Taiwan
China
Hong Kong
Singapore
Thailand
Malaysia
Vietnam

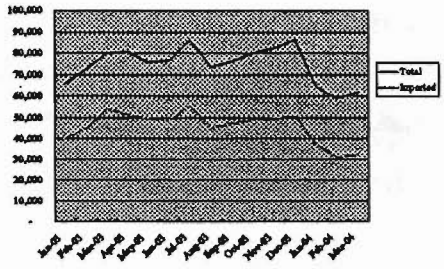
42% of total US Beef Export value (2003)

OPEN

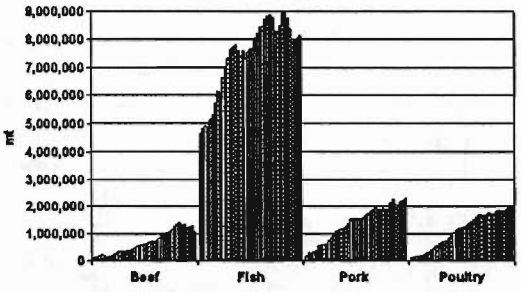
Philippines
Indonesia

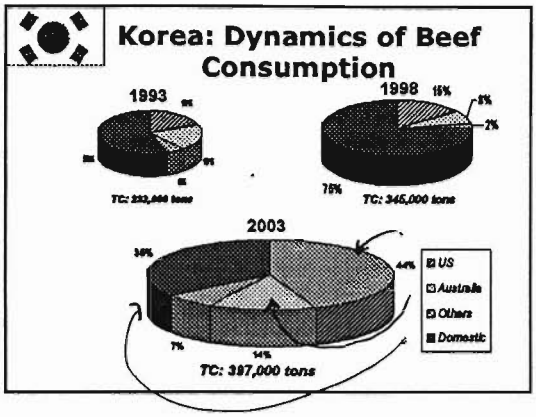
1%> total US beef export value

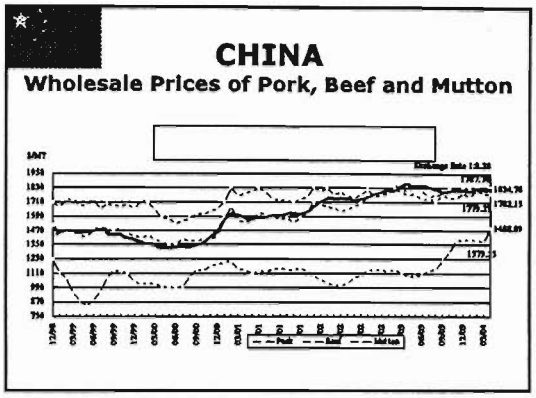
JAPAN: Post BSE Consumption Monthly Beef Marketings (metric tons)

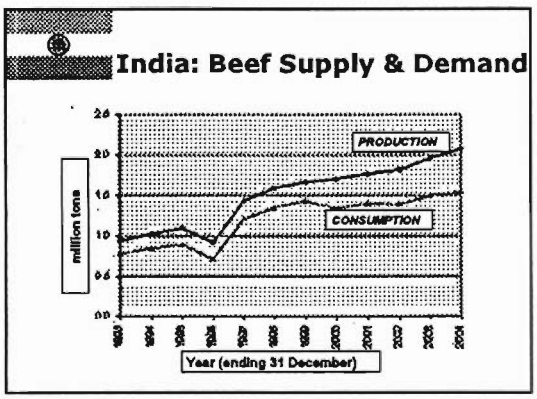


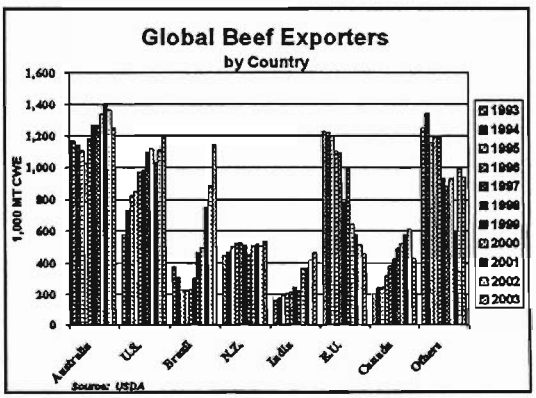
Japan Meat Consumption 1961-2001




Korea: Dynamics of Beef Consumption
1993
1998
2003
TC: 345,000 tons
TC: 387,000 tons
US
Australia
Others
Domestic


CHINA
Wholesale Prices of Pork, Beef and Mutton

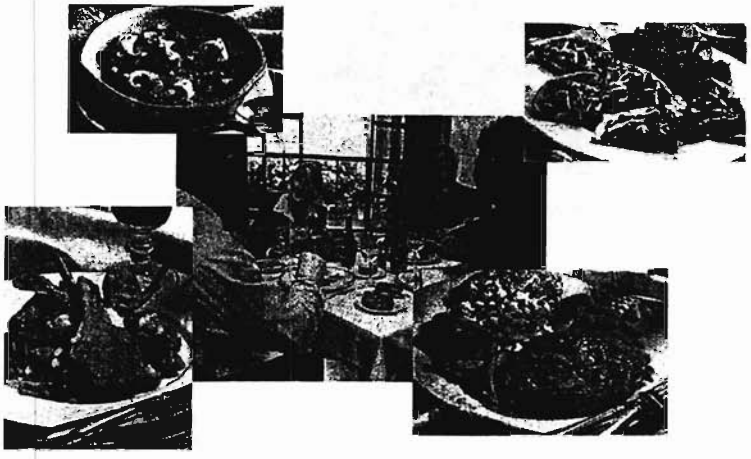

India: Beef Supply & Demand
PRODUCTION
CONSUMPTION
million tons
Year (ending 31 December)


Global Beef Exporters
by Country
1,000 MT CWE
1,600
1,400
1,200
1,000
800
600
400
200
0
Australia
U.S.
Brazil
N.Z.
India
E.U.
Canada
Others
1993
1994
1995
1996
1997
1998
1999
2000
2001
2002
2003
Source: USDA

Conclusions & Outlook

- *Lower imports and consumption based on U.S. absence and lack of alternative supplies.*
- *Resumption of U.S. access in 4th quarter 2004; new U.S. trade by early 1st quarter, 2005.*
- *Small but growing imports into China based on increased consumption; lingering access issues.*
- *Long term outlook: North American BSE issue fades and regional consumption expands.*

Bringing American Lamb to the Table

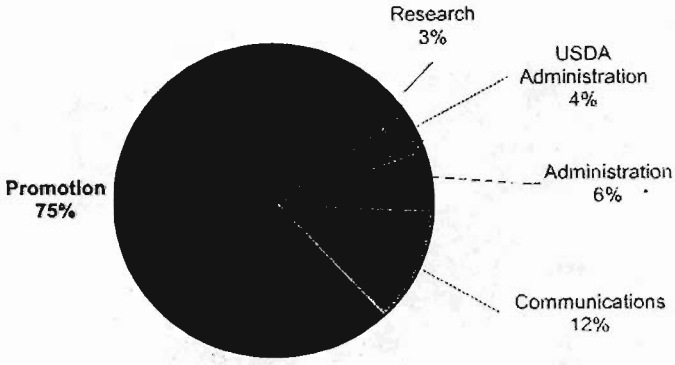


AMERICAN LAMB BOARD

ALB Strategy

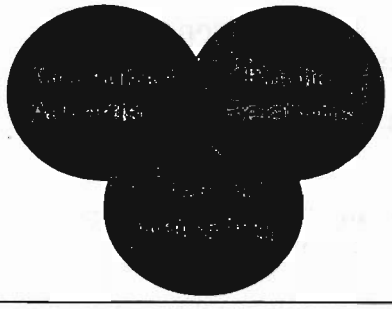
- Promote American Lamb to the best target groups as identified by existing research
- Minimize the volatility of seasonal product sales through targeted promotions
- Communicate openly and on a regular basis with ALB contributors
- Leverage and expand the ALB budget by developing cooperative partnerships
- Use research data to benchmark, measure and evaluate progress

ALB FY04 Budget – 2.4 million



ALB Marketing & Promotions

Through advertising, channel marketing and public relations, ALB wants to increase the demand for American Lamb in the marketplace throughout the year at a profitable price.

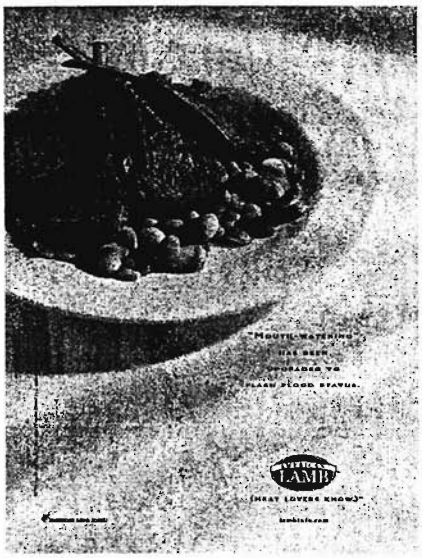


Consumer Marketing

- Goals
  - Increase domestic market's overall acceptance of lamb
  - Establish American Lamb as the preferred choice for lamb in the market place
- Target Market
  - Primary Audience – "Emerging Gourmets" who tend to be:
    - 40-60 years old
    - High HH income ($60,000+)
    - Married
    - Suburban
    - High lamb consumption
    - Dine out often
    - Enjoy cooking and entertaining
    - Attend and participate in cultural activities

Consumer Marketing

- Implementation
  - Full page, four-color ads in national epicurean magazines, utilizing current "(Meat Lovers Know)" print ads
    - *Bon Appetit*
    - *Cooking Light*
    - *Food and Wine*
    - *Gourmet*
  - Anticipated Results= 95,600,000 consumer impressions



Public Relations

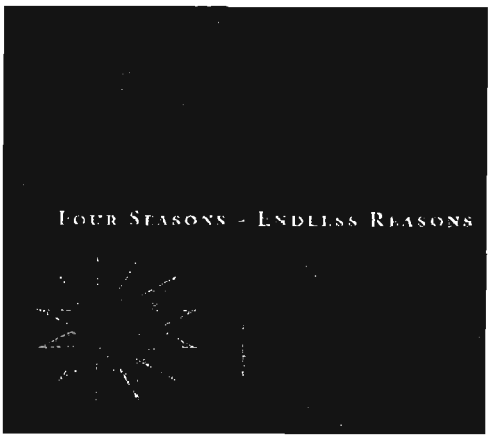
Goals:

- Minimize volatility of seasonal product sales
- Promote new uses and cuts of American Lamb

PR Approach:

- Leverage seasonal cooking trend
- Use as platform to introduce new cuts

Introducing...



Four Seasons • Endless Reasons Campaign

Promoting American Lamb for Every Season

Our Targets

Emerging Gourmets

Food & Lifestyle Magazines
Newspaper Food Sections
Feature TV News
Prominent Events

Culinary/Retail Food Professionals

Chef Events
Trade Media

Strategic Approach

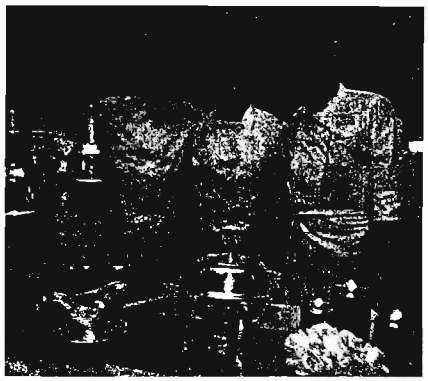
- Enlist Chefs as "American Lambassadors"
- Create Splashy National Magazine Media Event
- Conduct Consumer Media Relations
- Execute Culinary Marketing Campaign

Key Messages

1. Year-Round Availability
2. Wide Variety of Cuts and Many Value Options
3. Choose American Lamb for Mild and Fresh Flavor

Consumer Media Relations

- New York Event - American Lambassadors Team Up
- Nationwide Press Kit Distribution
- Eat American For Lamb Campaign
- Local T.V Interviews
- National T.V. Coverage



Culinary Marketing Campaign

- Secured American Lamb sponsorship and presence at 6 prominent food events
  - Ongoing culinary and foodservice/retail trade media relations

IACP
INTERNATIONAL ASSOCIATION OF CULINARY PROFESSIONALS

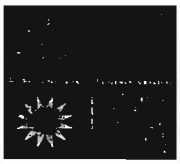
Epcot

Honor Society of the American Culinary Federation

The Culinary Institute of America 1946

What's Next?

Consumer Media Campaign



- Ongoing media relations
  - National media pitching
  - Color recipe pages for newspapers
  - Summer press kit for newspapers and TV

Culinary Marketing Campaign

- Chefs recipe contest
- Ongoing trade media relations

Channel Marketing

- Goals/Targets
  - Increase featuring and ensure availability of American lamb at top 25-50 leading supermarket chains
  - Encourage the menuing of American lamb with particular focus on casual dining and high-end restaurant chains
  - Educate the chef/student community on the features and benefits of American lamb vs. foreign competition

Culinary Education

- Educate the chefs of tomorrow
- Targeting culinary school educators and students
- Mailing of video and Instructor's Guide to leading culinary schools in February/March
- Available in VHS and DVD format

American Lamb Makes the Plate

Retail Marketing

- Focus on partnership programs to stretch the budget
- Select partners based on common customer base, financial resources and complimentary categories

Spring/Summer '04 Retail Program

- Continue partnership with Buena Vista Winery
- Kraft third partner
- Grill oriented cuts (loin chops)
- Present program to leading lamb suppliers in conjunction with BVW
- Program components include partner-funded coupons, wine, meat and grocery POP, recipes, wine-pairing suggestions and sweepstakes

Recipe Label Program 2003-04

- Key retailers including Albertson's, Kroger, Stop & Shop, Price Chopper, Acme, Roche Bros., Kash 'n Carry
- Over 10 million labels purchased by retailers to date

World Meat Congress
Winnipeg 2004
Beef Committee Meeting

South American FMD
Overview

Dr. Roberto Vázquez Platero
Uruguay

World Meat Congress Winnipeg 2004

Beef Committee Meeting

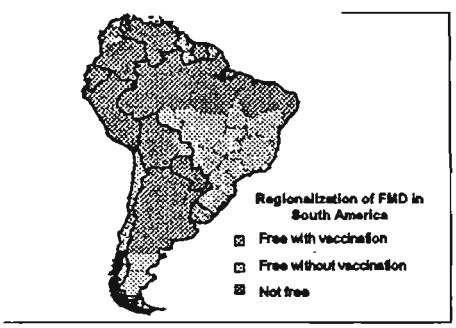
South American FMD Overview

Dr. Roberto Vázquez Platero
Uruguay

Presentation outline

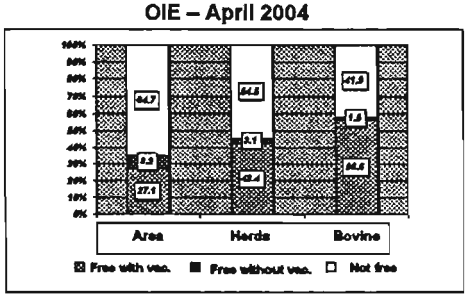
- SA FMD status according to OIE
- SA Epidemiological situation
- Impact of vaccination in Uruguay
- Hemispheric actions to eradicate FMD

FMD situation OIE March 2004

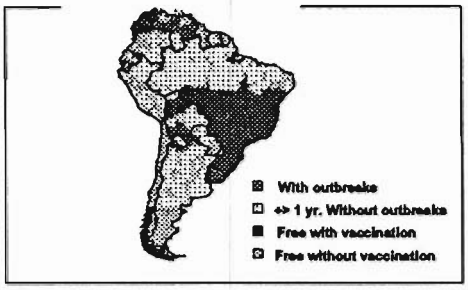


FMD Situation in South America according to sanitary condition

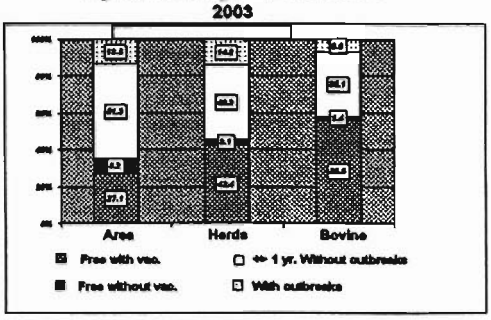
OIE – April 2004



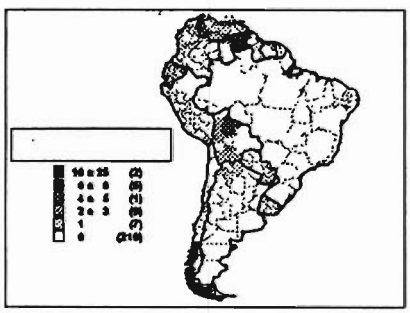
Sanitary Situation of FMD South America 2003



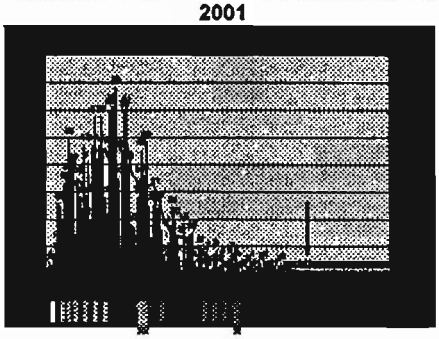
South American FMD Epidemiological Situation 2003



Outbreaks per Region in 2003



Impact of Vaccination in Uruguay 2001



Hemispheric actions to eradicate FMD

Houston Hemispheric Conference

- **Political, technical, financial and administrative commitment to eradicate FMD from the Americas**
- **Establishment of an interinstitutional private public eradication group to prepare supervise and execute a Regional Project for the Final Phase of Eradication of FMD from the Americas**
- **Development of a Plan of Action**

Eradication Plan of Action

Objective

"Eradicate FMD from the Americas in a 5 year period as of 2005, complementing country eradication efforts"

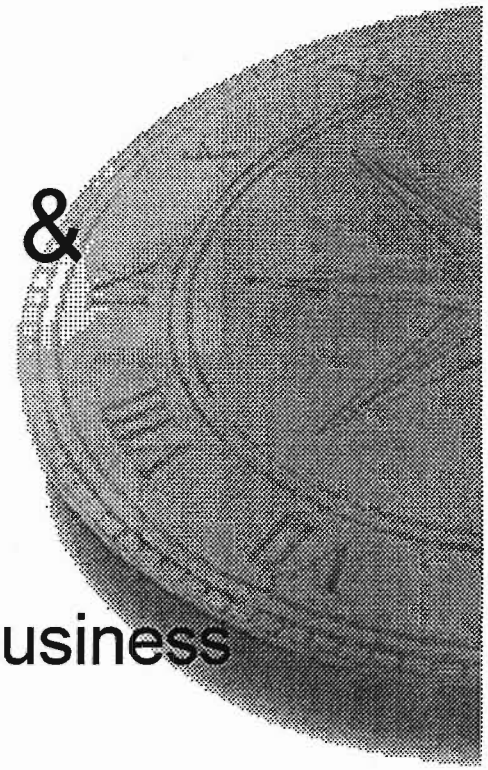
Prioritary actions

- Intervention in critical zones
- Bi or tri national border actions
- Strengthening of local level activities

Eradication Plan of Action II

- Protection of free countries and areas
- Continental implementation of SIVCONT
- Laboratories strengthening
- Quality of vaccines and vaccination procedures
- Auditing
- Communication and Sanitary training
- Interinstitutional cooperation

WTO developments & the beef industry



Fiona Boal

Associate Director, Food & Agribusiness Research

Rabobank International

WTO developments & the beef industry

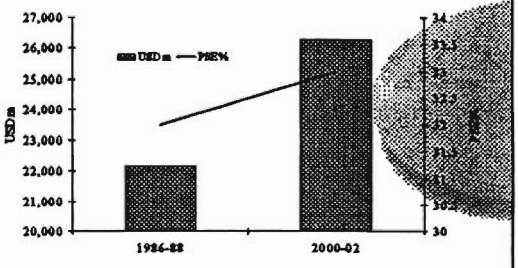
Fiona Boal
Associate Director, Food & Agribusiness Research
Rabobank International

Outline

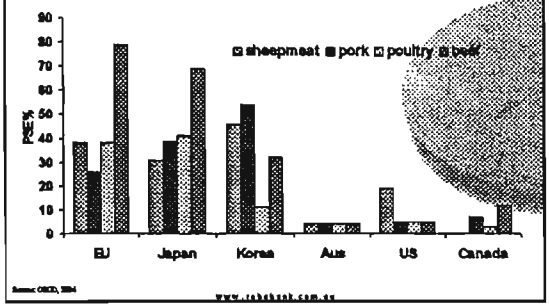
- Rabobank
- Current support levels
- Doha - July 2004 deadline
- Where do the key players stand?
- Stimulating change
- Sticking points

Rabobank's international network

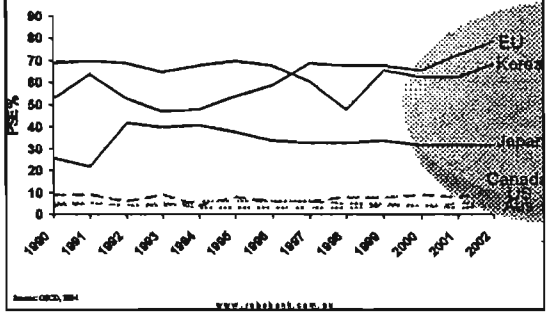
Total support to beef producers has risen not fallen



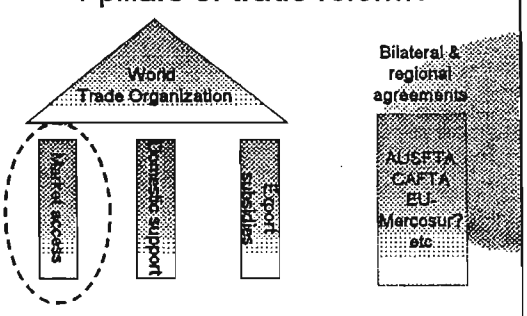
Beef is still more protected than other meats



EU, Korea & Japan continue to offer the highest levels of support



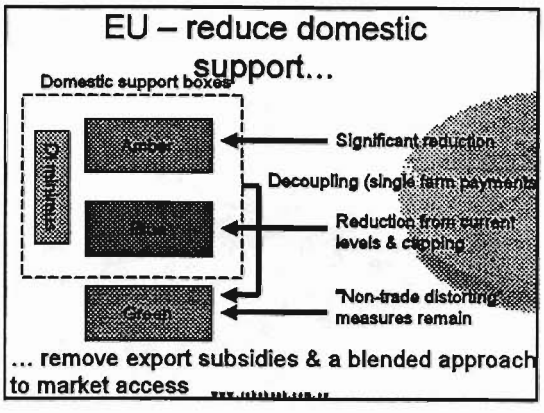
4 pillars of trade reform?

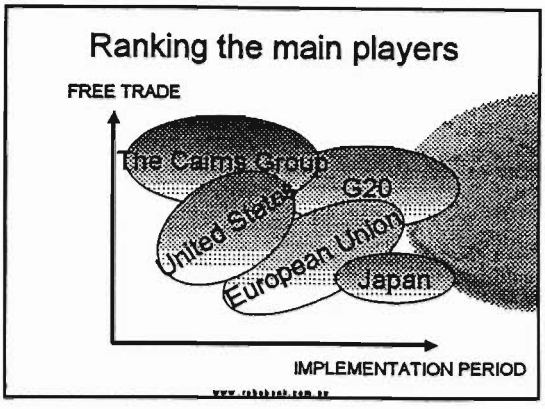


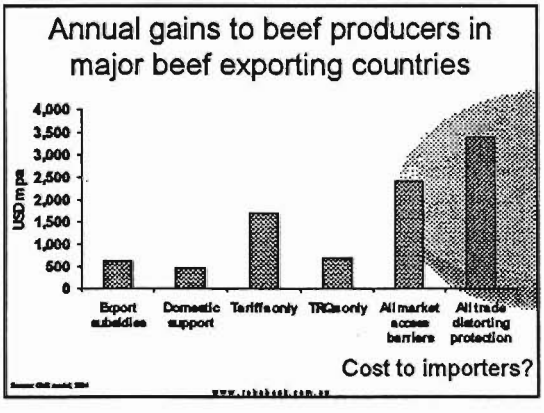
The best thing about Doha is that it's still alive

- July 2004 deadline for modalities (without numbers)
- Ag Committee has 2 meetings before July
- Encouraging noises
  - Agreement on export subsidies (just need to set a date)

but still can't agree on access
(Uruguay v Swiss v "Blended" approach)







Encouraging change

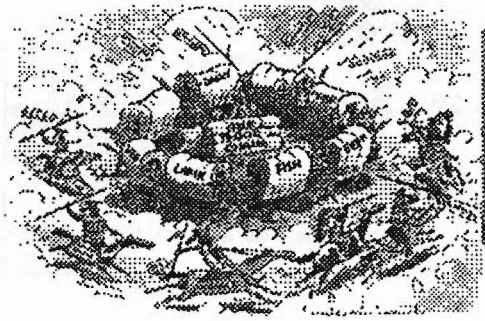
- Consumer & taxpayer awareness
- Commercialisation of agriculture
- Innovation & product differentiation
- Internationalisation of retailers & processors
- Non ag issues (eg Singapore issues)
- Leadership (EU, US, Japan, Cairns, China, G20)

Sticking points

- Technical barriers (eg SPS, labelling)
- Food safety
- Bilateral & regional agreements
- Effectiveness of the disputes panel
- Singapore issues
- EU enlargement
- US presidential elections
- New European commissioner

POLITICS

The battle continues



Short Term Market Prospects for MERCOSUR Beef

Arturo Llavallol

President of the Argentine Beef Promotion Institute

2nd. Vicepresident of the Sociedad Rural Argentina

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BEEF AND VEAL
Production - CWT 000

	1997	1998	1999	2000	2001	2002	2003
ARGENTINA	2712	2468	2720	2718	2461	2700	2800
BRASIL	6050	6140	6050	6300	6820	7240	7386
PARAGUAY	226	231	248	238	200	205	215
URUGUAY	468	454	420	450	371	412	424
MERCOSUR	9,456	9,294	9,436	9,706	9,852	10,557	10,824

Source: IER, SRA based on FAO and USDA

Per Capita Consumption
kgr./inhab /year

	1999	2000	2001	2002
ARGENTINA	67.8	66.5	63.9	59.6
BRASIL	35.5	36.9	35.2	34.9
PARAGUAY	41.0	42.7	43.7	42.0
URUGUAY	56.2	55	57.9	48.6

World average consumption = 9.1 kgr/inhab/year

Source: Argentine Rural Society

MERCOSUR Foreing Trade
in 000 CWT

	1993	1998	1999	2000	2001	2002	2003
• Brasil	448	370	541	554	789	929	1.194
• Argent.	283	291	339	343	150	329	338
• Uruguay	108	279	246	279	177	259	320

Source: IER - CERA

MERCOSUR Major destinations

• Fresh and Frozen	EU
•	South America
•	Middle East
•	the USA
• Processed	EU, USA

Source: IMS - GIRA

EU 2003 Beef Major Suppliers

Brazil	55.4 %
Argentina	18 %
Poland	8.6 %
Uruguay	5.3 %
MERCOSUR	78.7 %

Source: EU Beef Forecasting Group

EU BEEF SUPPLY AND DEMAND (CWE 000 tons)

YEAR	PRODUCTION	EXPORTS	CONSUMPTION	SURPLUS/DEFICIT
2002	7450	550	7400	(515)
2003	7350	440	7580	(676)
2004	7280	360	7520	(602)
2005	7100	300	7510	(711)

Source: EU Beef Forecasting Group

EU BEEF IMPORTS (CWE 000 tons) mil tons

YEAR	TONS
2001	375
2002	475
2003	500
2004	600*
2005	720*

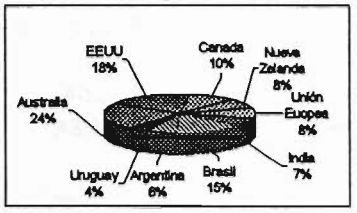
Source: SRA

* Estimates

Mercosur - EU
NEW BEEF AGREEMENT

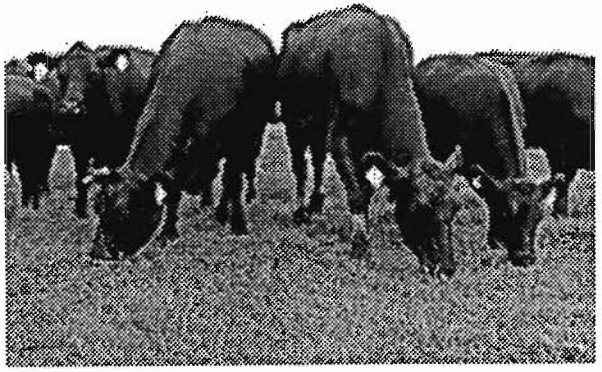
- It is a very important negotiation for MCS
- It is considered sensible by our sector
- EU would give us a new beef quota divided into two fases.
  - Mercosur wants more quota than EU is offering us in only one fase, with zero tariff
  - Negotiation is actually on course and will probably end by October, 2004.

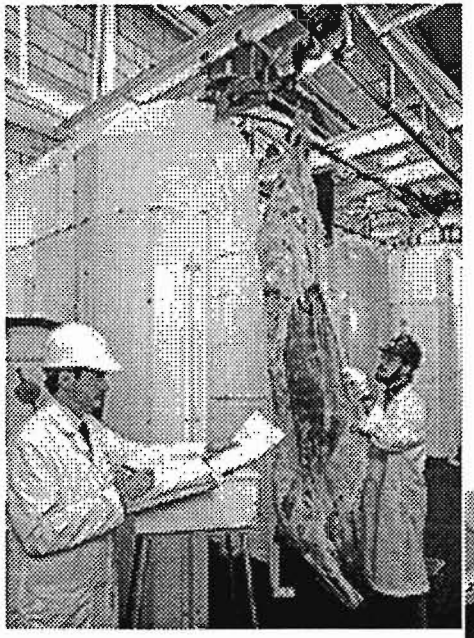
World Market Share
Beef Exports 2002

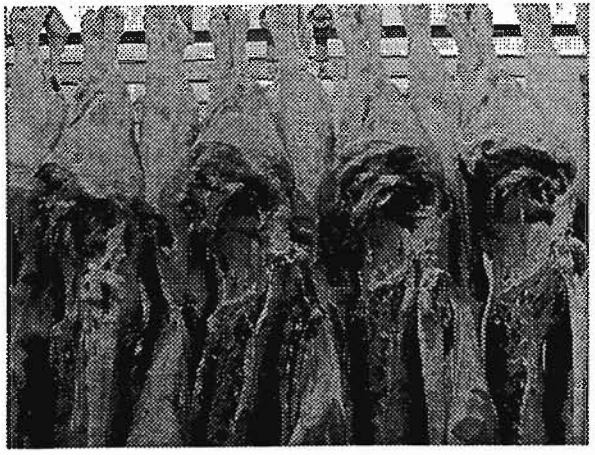


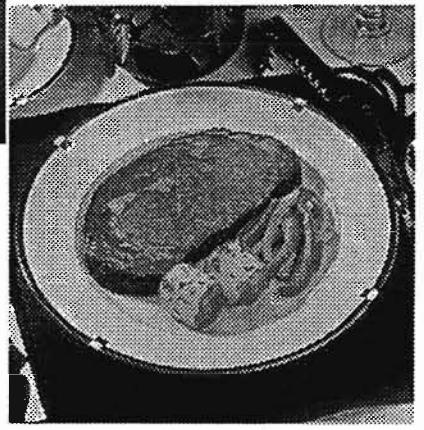
MERCOSUR : 25% of TOTAL

Let's MEAT the Market





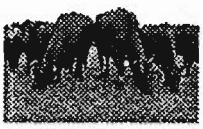




FAO, Commodity and Trade Division

WMC-Beef Mtg. Winnipeg, Canada 14 June, 2004

Let's MEAT the Market



FAO,
Commodity
and Trade
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WMC-Beef Mtg.
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Canada
14 June, 2004

Issues of Concern to Market Participants

Disease Outbreaks

Market Access

Protectionism

Policy Developments

Food Safety

Input Costs

Structural Change and Competitiveness

Liberalization

Exchange Rate Movements

Technical and Sanitary Standards

Long Term Market Prospects

An Overview of the Presentation

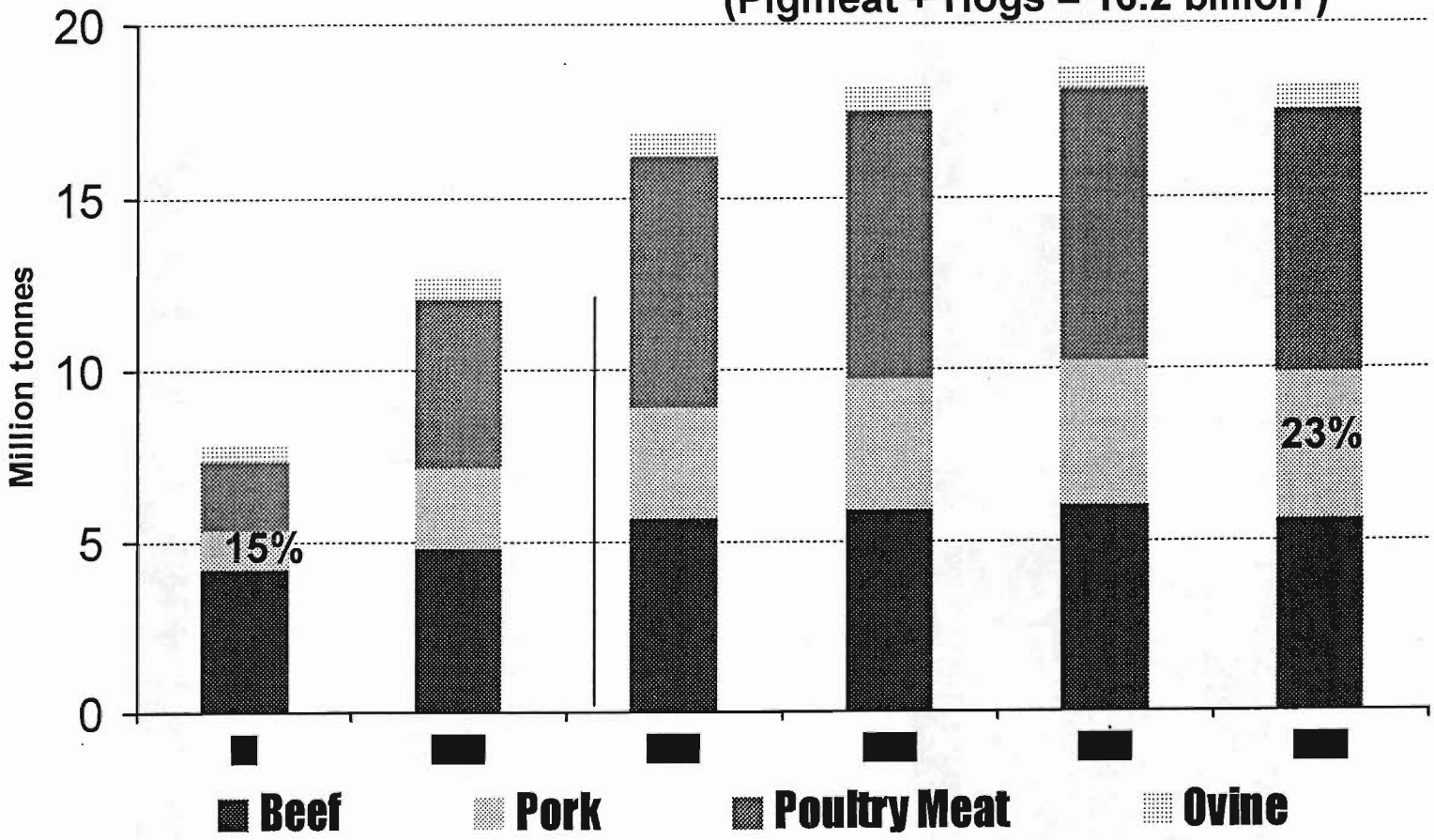
- Trends in the global livestock sector
- Outlook for 2004
- Trade and Animal Disease
- The Challenges for the Livestock Sector

World Meat Production,

a historical perspective, 1990-2004

Strong consumption gains prompts trade gains.... US$54 billion 1/

(Pigmeat + Hogs = 16.2 billion)

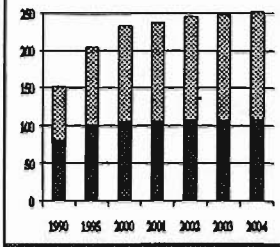


1/ including live animals and EU intra-trade

World Meat Production,

a historical perspective, 1990-2004

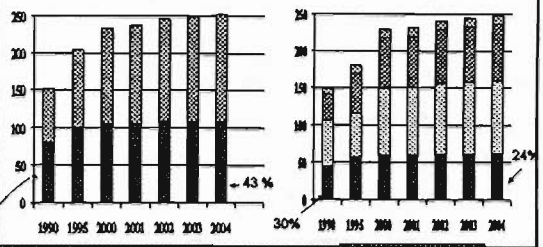
Growth in Developing Countries



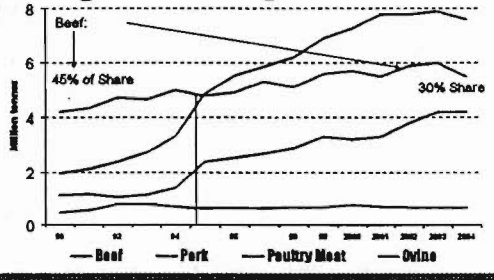
World Meat Production,

a historical perspective, 1990-2004

Growth in Developing Countries *...Driven by Gains in Poultry/Pork Sectors*



Strong consumption gains prompts trade gains.... composition shifts



Beef Markets going into 2004

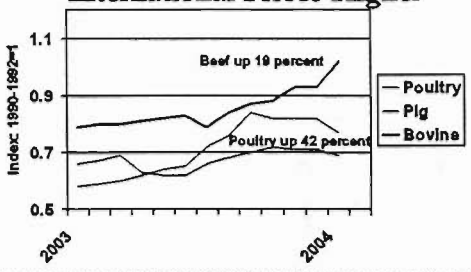
- Originally output up in response to rising prices in 2003,
- with trade and consumption forecast up as stronger economic growth strengthening demand
- BUT....BSE in Canada/US limit exports, AI throws markets into turmoil
- Feed prices rising rapidly

Results in:

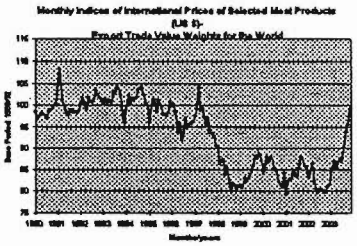
Outlook for 2004

- Beef production up only marginally
- A drop in per capita consumption 2%
- Reduced exportable supplies
- Rapidly rising international beef prices
- Significantly lower export prospects- down 8 percent (5.8 mill tm)

Reduced Meat Supplies Push International Prices Higher



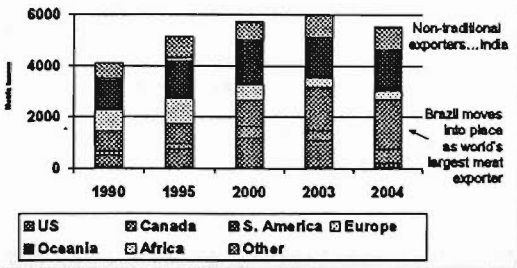
Meat Prices Extremely Volatile



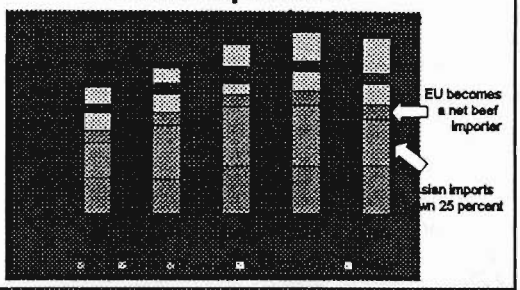
The World Beef Trade

Source: Rabobank International

Beef Exports to Drop 8 percent

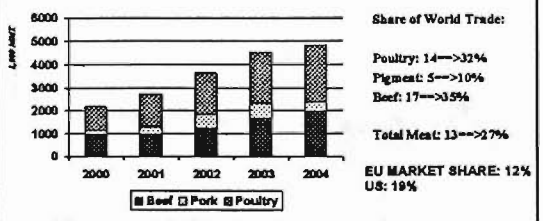


Due to dramatic decline in Asian imports.....



Animal disease/exchange rates==> increased competition among exporters

South America Meat Exports



Issues of Concern to Market Participants

Disease Outbreaks

Market Access

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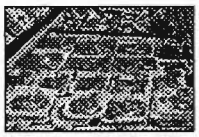


Exchange Rate Movements

Technical and Sanitary Standards

Long Term Market Prospects

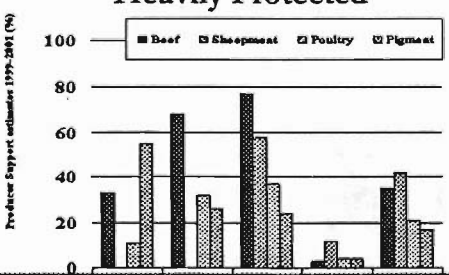
Policy Developments Affecting Markets

- EU Accession: more of an impact on hog/poultry sectors than beef
- EU limited use of export subsidies
- Russian continued use of TRQ to restrict imports
- Continued high support for meat products
- Changing standards at the OIE…..implications for trade?

Protectionism: Some Facts of Interest—in the OECD ….(2002)

- Total Value of Production (at farm gate)=637 billion
- Total Support Estimates: 312 billion
- Estimated Support to Livestock Sector (excl. wool):
  104 billion (16%)
  - Beef/Veal: 34 billion (32%)
  - Sheepmeat: 5 billion (.5%)
  - Pigmeat: 11 billion (10 %)
  - Poultry: 7 billion (7%)
  - Milk: 47 billion (46%)

Livestock Sectors: Heavily Protected



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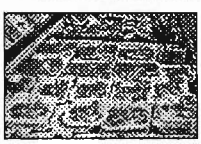
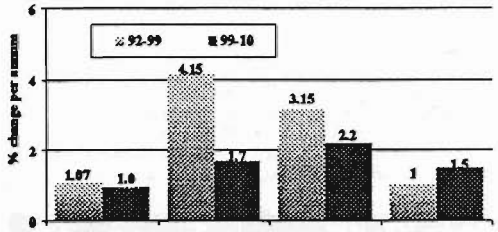
Technical and Sanitary Standards
Long Term Market Prospects

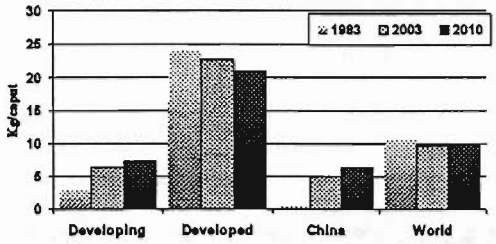


Medium Term Outlook: Meat Demand Outpaces All Others

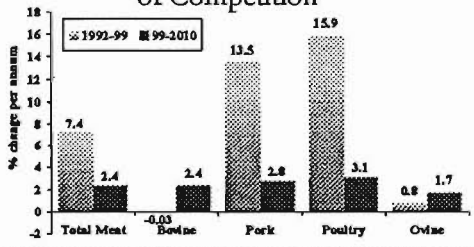


Who will be consuming beef?

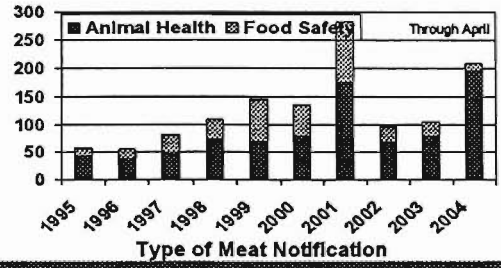
(Kg/Capita)



Trade Growth Slows for all Meats: Prospects for Beef Stronger but Lots of Competition



Proliferation of SPS notifications. Meat Notifications since 1995....

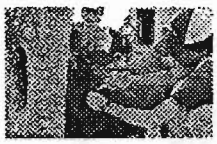


Meat Sector: Challenges

- Animal diseases and food safety concerns
- SPS issues and barriers
- Health issue awareness (hormones, GMO's, Halal)
- Product quality and safety are passwords to success
- Growing number of exporters
- Competition globally from pork and poultry
- Traceability and labelling
- Social concerns: Environmental and animal welfare
- Exchange rates

Thank You

Subscribe to the FAO Electronic Discussion Group on Meat Trade:



Contact:
Nancy Morgan
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Phone: 39-06-570-54528
Fax: 39-06-570-54495
FAO web site: www.fao.org

IMS Sheepmeat Committee Meeting
Winnipeg Convention Centre
8.00 – 10.00 Monday 14 June 2004

AGENDA

Chairman – Neil Taylor

1. Chairman's welcome and opening remarks

2. Approval of Report of Meeting of 30 March 2003 in Punta del Este

3. World overview of Sheepmeat Situation - presentation by **Andrew Burtt** of Meat New Zealand.

4. Report on the Lamb Innovation Network Website **Chairman**

   (i) Progress to date, and future strategy
   (ii) Stakeholders observations
   (iii) Current management and ownership of the site
   (iv) Role of the Sheepmeat Committee in the development of the site

5. Research and Development – a roundtable discussion with inputs from a range of producing countries : **Bob Bansback, MLC, England : Laurent Vernet, QMS Scotland :Scott Hansen, MLA, Australia: Andrew Burtt, MNZ New Zealand: Emmanuel Coste, Interbev Ovin, France: Peter Orwick, American Sheep Industry Association**

6. The impact of scrapie on international trade – **Dr. Alejandro Thiermann, OIE**

7. Promotional Activities for Sheepmeat – invited contributions from UK, Australia and United States **-Bob Bansback, Laurent Vernet, Scott Hansen, Peter Orwick, Emmanuel Coste**

8. Sheepmeat's nutritional benefits : Paper by **Fiona Carruthers, Senior Nutritionist at the NZ Beef and Lamb Bureau** to be presented by the Chairman

9. Nomination of Chairman to be put forward for appointment by General Assembly (Chairman must be Member of IMS Board of Directors)

10. Election of Vice-Chairman and election of Secretary

11. Chairman's Summing Up

IMS Sheepmeat Committee

Sunday 30 March 2003, 13h00-15h00
Conrad Hotel, Punta del Este

Chairman: Neil Taylor, CEO - Meat New Zealand

MINUTES

1. Welcoming delegates, the Chairman said that it had been a difficult year with sheep numbers in decline, but hoped this would be a short-term phenomenon. He recalled that the main issue to emerge from the last meeting in Berlin had been the various opportunities for cooperation among sheepmeat producing countries.

2. Representatives from Uruguay, Argentina, Brazil and Chile made presentations on the sheepmeat situation in their respective countries.

   URUGUAY: Gabriel Capurro (S.U.L.) and Carlos Salgado (S.U.L.) described how in Uruguay with an abundance of water, 85% of the country was devoted to pasture. Sheepmeat accounted for 3.1% and wool 15.1% of agricultural exports. Of the total 48 380 stockbreeders in Uruguay, 26500 of them raised sheep. There were currently almost 11 million sheep in Uruguay but this had declined from 25 million in 1990. Sheepmeat production had more than halved from 66.8 thousand tonnes carcase weight in 1990 to 31.4 thousand tonnes in 2002. Annual *per capita consumption* was around 6 kg in 2002 but had been over 13 kg in 1990 and over 14 kg in 1996. The UK, Brazil, France and Germany were the principal export markets for Uruguayan sheepmeat. All packing plants were cooperating in a quality project for exported lamb. The implementation of integration programmes between producers and the industry had facilitated an improvement in the quality of the sheepmeat produced, modified the seasonality of supply and positioned Uruguay to become a very competitive sheep exporter.

   ARGENTINA: Ramon Gambetta (Argentine Secretariat for Agriculture, Livestock, Fisheries and Food) said that sheep numbers in Argentina had declined over the years with over 2 million heads slaughtered in 2001/02 compared with 4.7 million in 1990. Only around 6% was exported, the rest going to domestic consumption. During recent years imports had surpassed exports. *Per capita* sheepmeat consumption is around 700 grams. Spain with 49% of exports is the principal market. There is currently a ten year strategy to increase exports to 25 000 tons. This will involve increasing sheep numbers by 2 millions, increase extraction from 18% to 24%, increase breeding percentages to more than 60% and increase slaughter weight by 2kg/head.

   BRAZIL: Professor Daniel Benitez Ojeda (Universidade Federal do Rio Grande do Sul) spoke on : "Production of Quality Meat in Brazil, a Challenge, a Failure or an Impossible Goal". So far it had been a failure due to a lack of competitivity. There were 14.8 million sheep in Brazil, the two principal producing regions being the North Western and Southern regions (8 million and 5 million sheep respectively). In 60% of

the Northwestern Region, sheep and goats are the only animal nutrition to feed the family. It is a poor region where 34% of children under 5 years are undernourished. The limitations to expansion are linked to the lack of basic zoological and sanitary controls, lack of technical assistance and a low level of organisation and management. There is now a general awareness of the importance of sheepmeat in regional food security. Among the priorities are the genetic evaluation of native genotypes, the control of crossbreeding with exotic breeds, the decrease of slaughtering without sanitary inspection, and the control of commercialisation without basic hygiene (lack of cold-storage rooms). In the Southern Region over the next few years there will probably be an increase in wool sheep production, because of its historic vocation and lack of a secure production alternative. Brazil will continue to depend for some time on sheepmeat imports to satisfy demand. There is a great opportunity for the installation of business groups in Brazil with the necessary know-how to coordinate the production and commercial process and thereby expand the quantity and quality of Brazilian sheepmeat.

CHILE: Patricio Almovacid, Chairman, Asociacion Chilena de Criadores de Corriedale described the sheep production system and the geographical distribution of the sheep population. In 1996 there were 3.8 million sheep of which 53% were produced in the southern regions of Magallanes and Chilean Antarctica. It is estimated that in 2002 there were 2.3 million sheep in Magallanes. The principal export market is the EU where 5000 tonnes are expected to be exported this year. The Magallanes Sheep programme incorporates more effective production techniques, improved farm management, investment in R+D (genetics, nutrition and management) and the generation of investments. It is hoped to double sheep numbers by 2010 and to open new markets, particularly through the Chile-USA Free Trade Agreement.

3. Allan Frazer, Meat New Zealand introduced the proposal to create a global network portal for lamb market innovators. This would be a website which would provide a bridge connecting scientific discoveries and consumer trends to promote innovation in lamb marketing. Lamb is a great food but needs constant innovation to advance its place in consumers' eating habits. The portal would exist to connect and provide topical leading-edge information for all those around the world whose job involves innovation in lamb. He described the recommended design for the site, its management and the financial implications of setting it up. He invited lamb producing countries to participate in the project. The estimated cost to set up the site on a trial basis of six months would be US$ 44 000 or US$ 6 000 per country if seven countries agreed to share the participation cost.

4. Anne-Birgitte Lundholt, Managing Director of Danske–Slagterier introduced a proposal concerning the regionalisation of safeguard provisions with particular reference to Foot and Mouth Disease. This provides for the application of a three-week time buffer if the safeguard provision is applied to Foot and Mouth Disease – free regions. As the incubation period for Foot and Mouth Disease is between 2 and 14 days (ref.OIE), the importing country should use the buffer period option rather than banning imports from Foot and Mouth Disease – free countries. If the safeguard provision is justified and applied to regions from other OIE list A diseases, an appropriate time buffer should be the first option.

4.2 To Approve Proposals recommended by Executive Council Concerning Regionalisation, Safeguard Provision and FMD

1. The principle of regionalisation is described in the OIE recommendations.

In the EU the application of regionalisation in cases of animal disease outbreaks is done according to a set of Community rules and regulations. The USA, Canada and other countries are following a similar approach.

There seems to be no disagreement between countries in their fundamental understanding of regionalisation, and the principle is also incorporated in veterinary agreements between international trading partners.

2. History shows that most importing countries accept the exporting country's regionalisation in cases of animal disease outbreaks. As an exception to the general rule an importing country does however have the right to apply the safeguard provision and thereby no longer accepts the exporting country's regionalisation. However, in such cases an importing country must be able to justify its import restrictions.

When, as an exception to the general rule, the safeguard provision is applied, the importing country should choose measures sufficient to protect its health status and at the same time least distortive to trade.

3. The principle of regionalisation is also applied in cases of FMD outbreaks. Recent experience does however show that in the case of FMD many importing countries fail to apply regionalisation. Instead they often apply the safeguard provision by banning imports from FMD-free countries up to several thousand km away from restricted FMD regions.

When an import ban is introduced even on FMD-free regions, it is often extremely time consuming and complicated to lift such a restriction on trade.

If an importing country justifies application of the safeguard provision it is therefore suggested to consider the use of a "3 week incubation time buffer" as a first option instead of introducing an import ban on FMD-free regions.

4. A 3-week time buffer is justified by the fact that for all species of FMD-susceptible animals the FMD-incubation period is between 2 and 14 days, ref. OIE. Thus if an importing country justifies application of the safeguard provision for a FMD-free region it would be a most logical solution to require that the meat should originate from animals slaughtered more than 3 weeks before the date of arrival of the meat in the importing country.

Such a measure would provide the same additional protection of health status as an import ban but trade would be significantly less disturbed. With the 3-week time buffer in place there would always be sufficient time available to introduce an import ban on the FMD-free regions if the FMD-status of the exporting region should change.

In summary with focus on FMD the following policy is suggested:

1. Regionalisation is the rule.
2. Application of the safeguard provision is the exception.
3. If the safeguard provision is justified applied on FMD-free regions the 3-week time buffer should always be the first option.

5. The Chairman thanked Gabriel Capurro and his team for the efficient organisation of the meeting, and expressed his appreciation to the speakers for their presentations. This had been the fourth meeting of the IMS Sheepmeat Committee, and during the five years of its existence, it had achieved much in terms of the cooperation between the various sheep producing organisations throughout the world. The nutrition and marketing workshops were examples of the mutual benefit generated from participation in the Sheepmeat Committee. The next meeting would take place during the Fifteenth World Meat Congress in Winnipeg, Canada on 14-17 June 2004. He invited everybody present to take part in the meeting.

REPORT TO THE IMS
ON THE
LAMB INNOVATION NETWORK
JUNE 2004

This report follows on from the report made available to the Executive of IMS for its meeting in May 2004. This is attached.

SITE USE STATISTICS

We have just gained access to the site statistics function this week.

Site Hits

- For the past 3 months an average of 3055 hits per month.
- In the past week (20/05 – 26/05) 1090 hits – 218/day

Page Views

- For the past 3 months an average of 863 page views per month
- In the past week (20/05 – 26/05) 384 page views – 76.8/day

Comments

- As we have less than 250 participants who have password access to the site internationally, the page view rate is encouragingly high.
- The trend is for use to increase
- This is in line with the comments made by a number of country representatives during a conference call on Wednesday, May 26; that interest in the site has been encouraging.
- We are actually quite surprised at the amount of traffic that is passing through the site because it has been a very low profile project.
- To be getting 3000+ hits a month without a search engine listing is really quite staggering.
- This suggests we are really on to something that has a lot of potential.

THE LIN PARTICIPANT SURVEY

Overview

- The survey was sent out to all those listed in the LIN e-mail database along with a request to country champions to forward it on to people they had invited to participate in their own countries.
- It was sent out on three occasions during April in an effort to generate a reasonable number of responses.
- The number of responses totalled 15 – quite disappointing.
- Only 4 responses came from people outside New Zealand

- The make up of respondents was as follows:

Category	Number of responses
Research	1
Cuisine & service	2
Processor and industry	3
Marketing	3
Country champions	3
Nutrition	1
Industry innovation	2

- The most negative responses came from the NZ processor respondents
- The most positive responses came from the cuisine, marketing and service respondents

Comments

- It is difficult to get meat sector people to respond to e-mails, something we found in the early stages of setting up the network and with this survey.
- The Country Champions need to be more proactive in inviting innovative people outside the traditional domain to join the Network.

SUMMARY OF RESPONSES

- 60% thought the site content was excellent or useful
- 57% said the content had provided a few innovative ideas
- 86% thought the content format was excellent or very good
- 71% thought the questions at the end of each item added some value
- 93% said the e-mail alert was helpful
- 71% looked at the site at least once weekly
- 71% had referred other people to the site
- 43% had considered responding to an item (although only a few actually responded)

A selection of comments from individual respondents follows:

What didn't you like about the site?

- Several involved in mainstream marketing and service activities thought the information wasn't adding value to their jobs
- Several said that there was insufficient input from most of the subscribing countries
- Several said science and trade specialists might not be getting enough focus

What can we improve?

- Make the information more relevant
- Get more countries involved
- Needs more of a professional interest focus
- Several said nothing needs improving
- One said putting more info about the items on the e-alerts would be useful

ADDITIONAL COMMENTS FROM WEBMASTER IAN IVEY

- The whole Lamb Innovation Network project is exploring a brand new model for connecting people who have diverse interests into an innovation "engine".
- It is something that takes time to evolve and needs a degree of patience.
- It will require refinement as we learn more about the dynamics and outcomes the Network generates
- The idea has always been to try and turn massive flows of information into tightly written challenging pieces that can be used as a basis for stimulating innovative thought – not just a source of information.
- Whilst several participants (mainstream sector people) have commented that the content might be too broad, it is important to realise that most major innovations in any sector come from outside the sector, not within. Screw caps on wine bottles came from the packaging sector, not the winemaking sector. RFID tracking technologies have come from the IT sector, not the packaging or manufacturing sectors.
- Including people with diverse perspectives such as Slow Food, marketing, experiential retailing, technology and demographics helps to enhance the innovation process by adding views and components from outside the mainstream sector area – where there are already vast high quality information sources.
- We are not trying to "compete" in that space but add some new dimensions
- We are also now trying to increase the amount of input on the site that is not in the public domain – but funding constrains what we are able to do.
- We do need leads to people and sources from more country participants. A name, an e-mail address, a reference – that's all we need!
- Currently we are only being given feedback on material that might be included in the site from 4 key people and they are all in New Zealand and Australia.
- The vast majority of the information placed on the site is derived from own personal sources and networks
- For the innovation network to leverage such challenges more people need to engage in a positive fashion.
- Like any other business the sector needs to develop new strategies to secure its future in the overall international meat and food markets
- That can only come about through the adoption of some innovative new approaches.
- The LIN site is the basis of a whole new approach to interactive knowledge management and innovation generation. Apart from Shell in The Hague, such

networks are few and far between. And those that do exist do not have such a diverse set of countries and interests to integrate.

- There is a significant amount of interest in other sectors in adopting more advanced forms of the LIN model - more interactive forms.

MEMBERSHIP

- Current member countries are:
  Australia
  France
  Ireland
  New Zealand
  United Kingdom – England, Scotland, Wales, Northern Ireland
  Uruguay

- The site has not gained any new country members since our last report. We have been concentrating on gaining support from the US, Germany who expressed initial interest. We have not been able to track down appropriate people to represent the Argentinean lamb industry. MLA has offered to approach their contacts in South Africa on a forthcoming visit.
- We intend to approach a number of other lamb producing/consuming countries such as Italy, Greece and China. We hope that the IMS Conference will provide a platform for recruiting new member countries.

FINANCES

- Subscriptions have been received from all member countries except Uruguay and the United Kingdom. We are in contact with our Uruguayan contact and hopefully payment will be made shortly. The United Kingdom member regions have not yet agreed on a method of sharing their contribution. IMS have contributed $6,000 US of their initial grant of $10,000 US. A decision on contributing the remaining $4,000 US will be made by IMS.

- As reported previously the high value of the NZ dollar in relation to $US at the time subscriptions were paid compared with that applying at the time of budgeting has impacted negatively on our budgeted income. Also we had hoped to have achieved a greater number of country subscribers by now.

- In discussion with a number of member countries we have decided, after 4 months of offering a weekly update, to revert to an update twice a month. Assuming that all member counties that advised they would join the network do pay up and the IMS makes its second grant of $4,000 US, the service will be able to continue through to mid/end November 2004. In addition a summary version is now being prepared and made available to France who have it translated at their cost. This could also be undertaken for Spanish speaking member countries.

- We discussed the pros and cons of seeking a sponsor to (i) ensure that the site can remain viable even if membership did not increase (ii) to shift from a member funded site to a public site (this would require 100% sponsor funding to be viable but would be a more attractive proposition for a sponsor). The

consensus at this stage was that participation of a sponsor could detract from the interactive and exclusive nature of the site.

- Looking forward we have assessed that continuing the site in its present format and with twice monthly updates the annual operating costs would total $38,000 NZ ($24,700 US based on an exchange rate of 0.65). If existing membership was retained this would translate into annual membership for large countries of $5,000 US pa and for small countries of $2,500 US pa.

Allan Frazer Project manager
Ian Ivey Webmaster

Scotch Lamb
2003 Campaign

To build an identity…

Laurent VERNET
Quality Meat Scotland (QMS)
Representing the Scottish red meat industry

June 2004

Scotch Lamb
2003 Campaign

To build an identity...

Laurent VERNET
Quality Meat Scotland (QMS)
Representing the Scottish red meat industry

June 2004

Scotch Lamb, what's that?

Scots only eat half of what British eat a year (*)

Scotland produced 3.8 millions lambs in 2003

Scotland, great reputation for beef,
but Scotch lamb is unknown

In UK three categories: Welsh, New Zealand and commodity
one price

(*) Population of Great Britain 60Mill, 10Mill

Scotch lamb
must have its own identity

Reject of the temptation to piggy-bag the Scotch Beef brand

Over 80% of production can qualify for PGI or PDO

No public recognition in Scotland or traditional markets

Strategy:
1- Consumer research
2- Communication campaign
3- Public reaction & readjustment

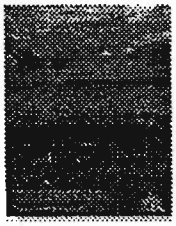
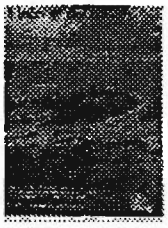
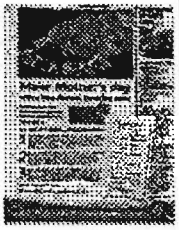
Lamb in store

- Respondents were purchasing lamb from both local butchers, supermarkets and the butcher's counter in the supermarket
  - In Glasgow some specifically purchased gigot chops on the bone from the butchers
- They sought
  - Good colour - red, not brown, clean and bright
  - Less visible fat
- A bad piece of lamb was considered to be relatively rare; it would be -
  - Fatty, or containing fat, especially rolled lamb was mentioned in Glasgow

Country of origin

- In each of the groups one or two respondents spontaneously mentioned country of origin as something they looked at in store
- Of these, most specified that they looked for "Scottish" lamb (Scottish groups) or British lamb (Surrey groups)
- Two specified that they looked for New Zealand lamb
  - Driven by habit and advertising

NZ Lamb

Country of origin : Imagery

Scotland

Romantic
Wide open spaces
Rugged
Windswept
Cold
Wet
Heather

All groups

Muddy field around the corner (Glasgow only)

Wales

Hilly
Wet
Green
Foot & Mouth
Chernobyl

Surrey groups

England

Populated
Industrial
Polluted

Surrey groups

New Zealand

Wide open spaces
Green
Sunny
Distant

All groups

Country of origin : Imagery

Scotland

Green , fresh, big open countryside
Calves grazing
Cold, lush grass lots of water

We know the really, they're down the road in the fields

Wales

Hilly
The same , cold wet
Misty
Not much different to Scotland
There's something in the lamb, the fallout?

England

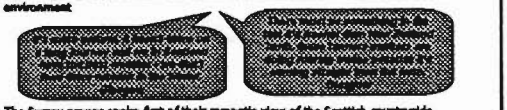
It's a bit polluted really
I was driving down the motorway and I saw sheep grazing beside the motorway. It makes me think it's unhealthy

New Zealand

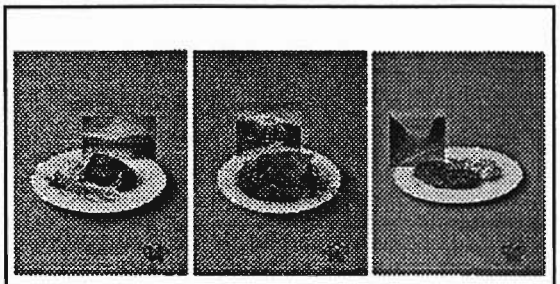
New Zealand is the hillside looking nice and green and lush
It's not a lot different (to Scotland) in New Zealand

Spontaneous ideas on promoting Scotch lamb

- Respondents were asked their views on how Scotch lamb should be promoted (in their region) before they were exposed to the concept statements
- The Glasgow groups focussed on proximity, freshness and the natural rural Scottish environment



- The Surrey groups spoke first of their romantic view of the Scottish countryside followed by freshness compared to New Zealand lamb



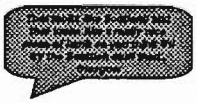
Fresh from Scotland

- It communicated the romance and beauty of the Scottish countryside
  - Implying natural and quality
- The road device literally said freshness through proximity

Fresh from Scotland

- The execution with the "road" device was this route at its best
- It was much better received that the Nature Smiles execution; many were positively enthusiastic about the idea

- It solved the conundrum of illustrating Scottishness in the context of a lamb meal rather than a cute creature



Strategy

Media

QMS has placed advertisements for Scotch lamb in a range of print media from August 2003 to January 2004 (break in Dec.).

Target lamb consumers

The main audience of these titles is females, 36+ years in age, and of social groups A,B and C1. This demographic group represents a core group of. lamb consumers to QMS.

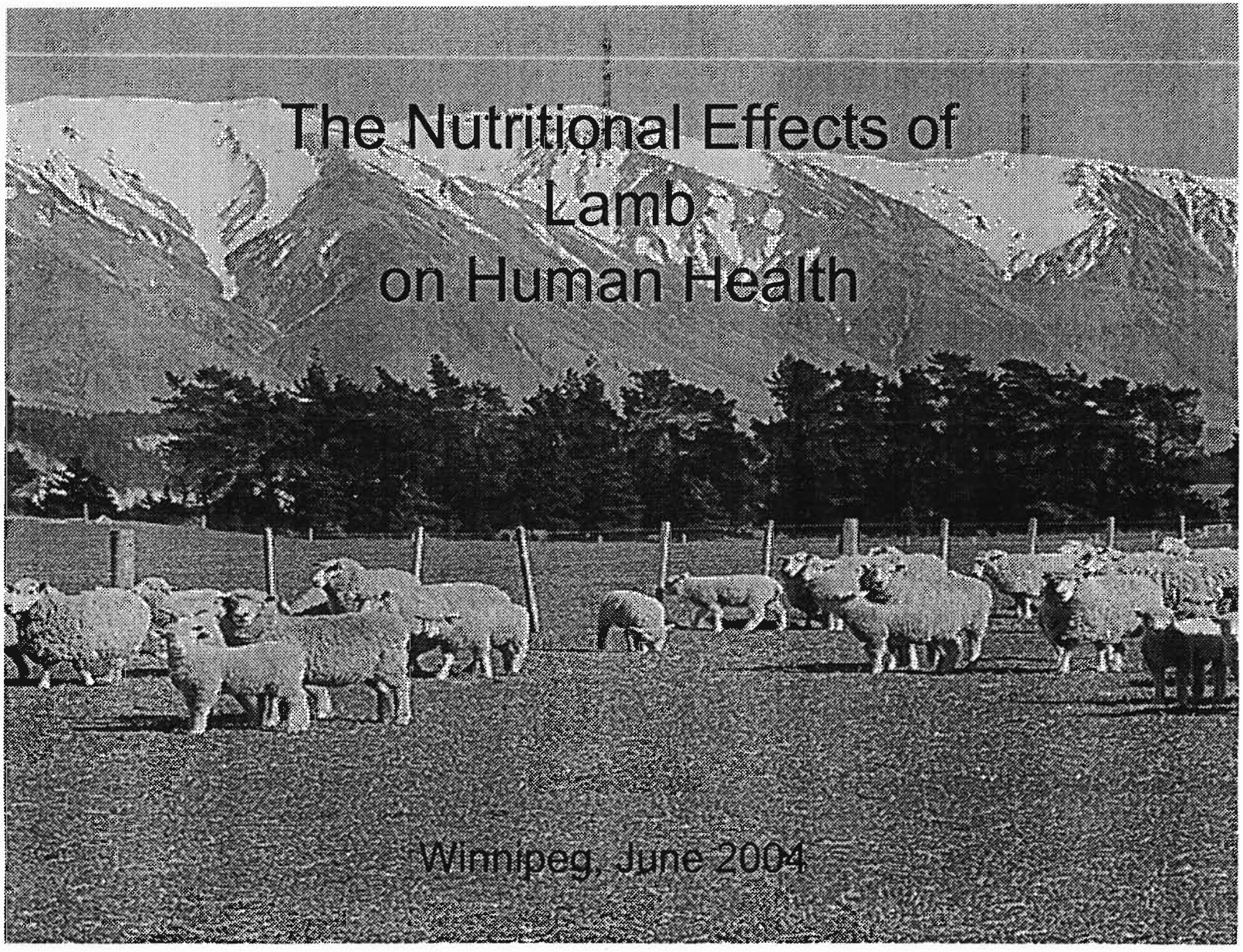
Objective

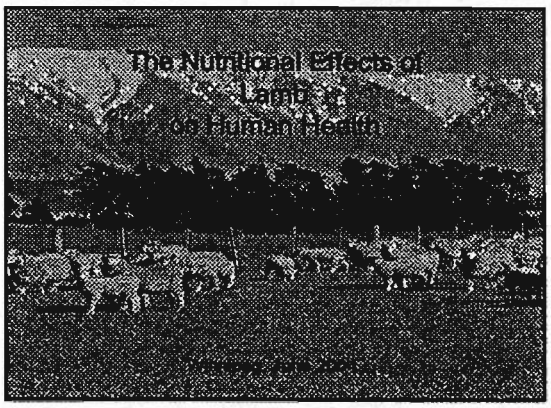
The objective of these adverts has been to create a brand preference for Scotch Lamb.



Next Steps

- Recollection of the adverts was low.
- Attitudes towards Scotch Lamb were nearly always favourable. Consumers were not generally satisfied that the current adverts did justice to the image they had of the product.
- The adverts as they stand are perceived to promote lamb as a category rather than creating a brand preference for Scotch Lamb.
- Most believed no one origin currently stands out as being a superior quality. Instead preference for origin was usually patriotic. There was thus, little reason amongst the English consumers to choose Scotch over English or Welsh.
- Price appears to be the major determinant of product selection, and most suggested that they would switch from the usual origin they chose if the price was of an alternative was more favourable.


The Nutritional Effects of
Lamb
on Human Health
Winnipeg, June 2004


The Nutritional Effects of
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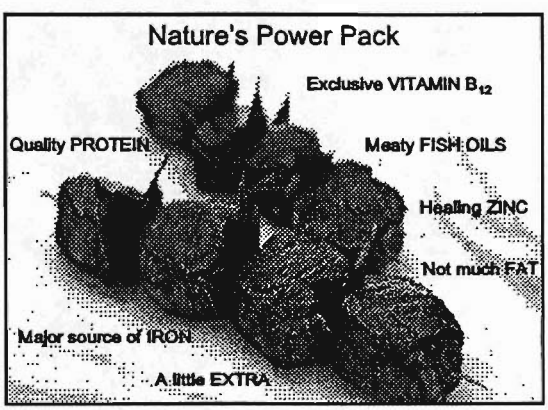
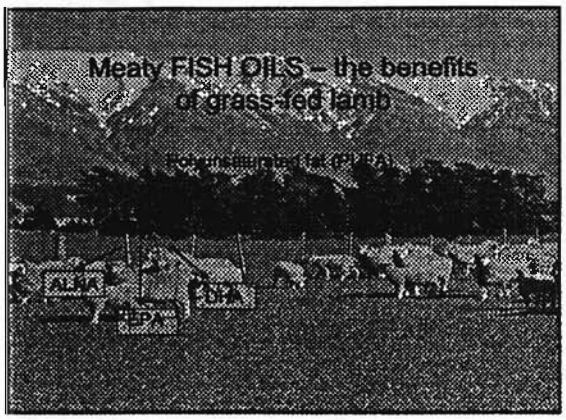
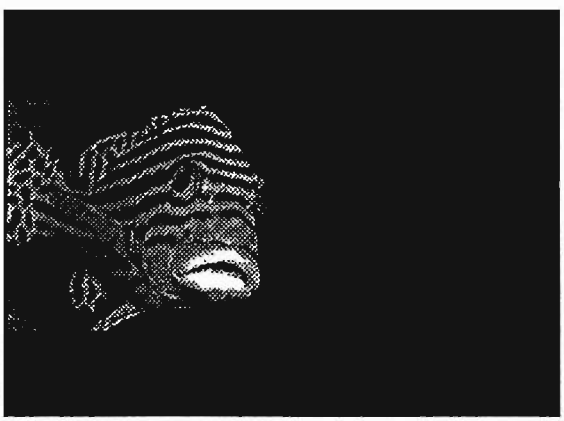
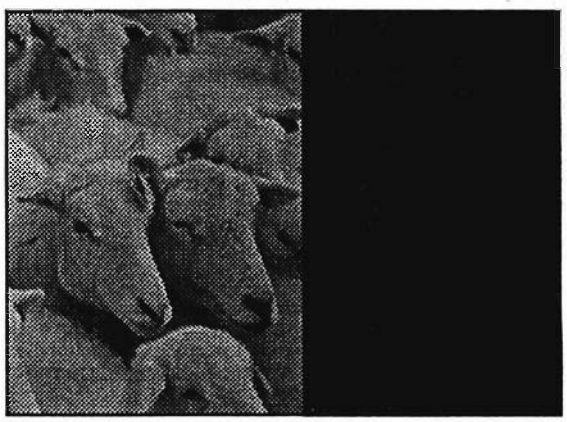
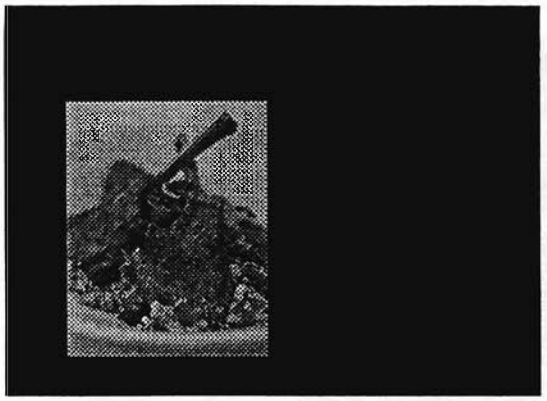

Nature's Power Pack
Exclusive VITAMIN B_{12}
Quality PROTEIN
Meaty FISH OILS
Healing ZINC
Not much FAT
Major source of IRON
A little EXTRA

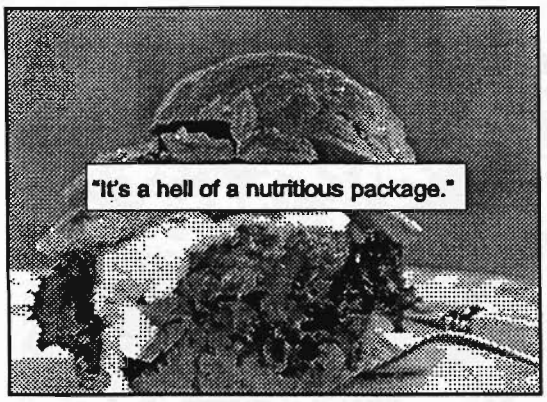

Meaty FISH OILS – the benefits
of grass-fed lamb

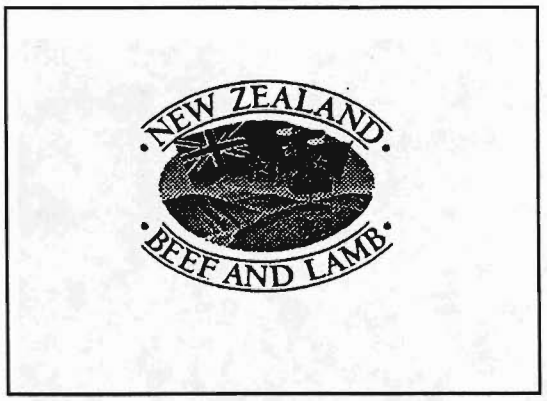

What do consumers know?
Rank: olive oil, canned tuna in oil, lamb chops, peanuts, beef schnitzel
1 = olive oil
2 = beef schnitzel
3 = canned tuna in oil
4 = lamb chops
5 = peanuts
Beef schnitzel
Lamb chops
Canned tuna in oil
Peanuts
Olive oil








"It's a hell of a nutritious package."


NEW ZEALAND
BEEF AND LAMB

World Meat Congress

Why Aussies Love their Lamb!

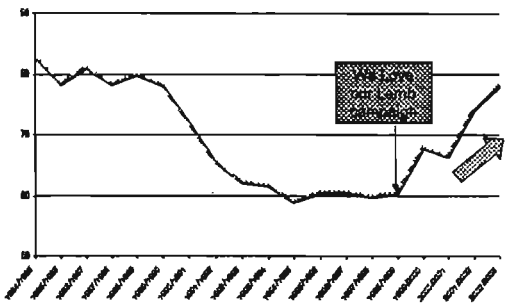
June 2004

World Meat Congress

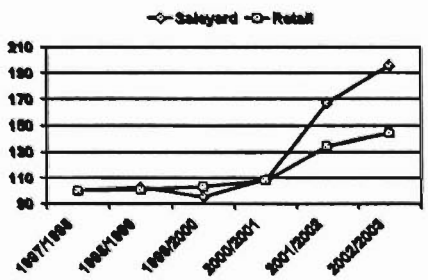
Why Aussies Love their Lamb!

June 2004

Lamb demand has seen a huge turnaround



Lamb producers are reaping the rewards of the increased demand



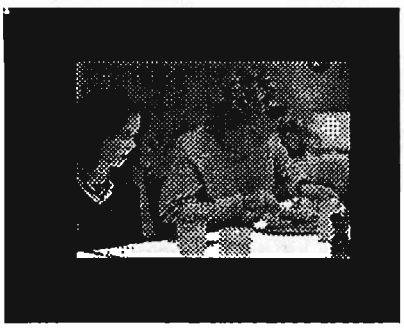
Wool producers switching their focus to more profitable Prime Lamb production


Meat sheep paying

Why are Australians demanding more Lamb?

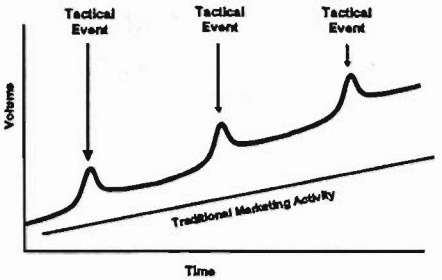
First, we addressed the older family

Then, the family with teenage kids



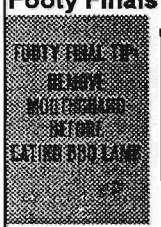
Then we captured the hearts of mums with young kids

The Strategy also grew the base of lamb buyers via a two pronged approach



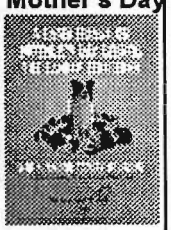
We found other reasons to talk about Lamb...

Footy Finals



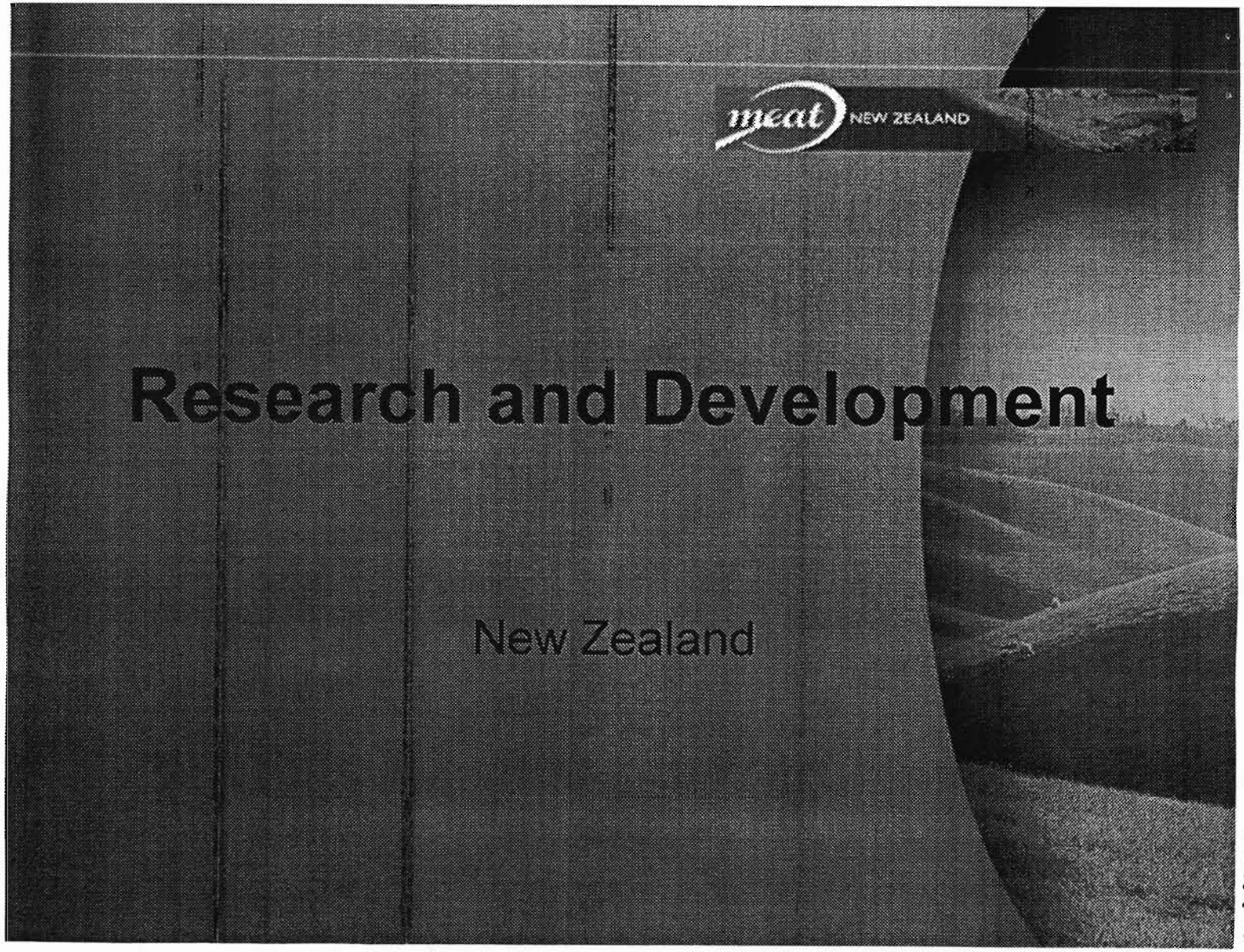
Australia Day

Mother's Day



Six key marketing principles of Lamb marketing:

1. The Volume opportunity is with contemporary Australian families
2. To be noticed, lamb needs year round activity
3. Lamb needs a distinctive voice
4. The Volume is with mainstream cuts
5. Integration of all activity is vital


meat NEW ZEALAND
Research and Development
New Zealand

Research and Development

New Zealand

Outcome Areas

- Sheep Genomics
- Greenhouse Gas Reduction
- Farm Health
- Farm Productivity
- Meat Products and Quality
- Wool Products and Quality
- Processing and Harvesting Efficiency
- Information Transfer

Sheep Genomics

- Ovita Limited:
  - Formed by Meat New Zealand, AgResearch and Wool Equities
  - Focus – commercialisation of intellectual property and products derived from genetic research and knowledge of the sheep genome
  - Not involved in the production of GM sheep

Ovita

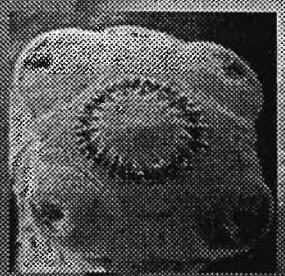
Greenhouse Gas Reduction

- Pastoral Greenhouse Gas Research Consortia (PGgRC)
  - Formed by the Sheep, Beef, Goat, Deer and Dairy industries
  - Aims:
    - reduce the emission of methane and nitrous oxide; and
    - improve animal efficiency
  - Outcome: lower emissions and increased productivity

Farm Health

Major investment programmes are:

- Internal Parasites
  - Methods of controlling drench resistance
- Tanning
  - Solving the agronomy issues of tannin containing plants
- Johnes Disease
  - Development of a vaccine



Farm Productivity

Major investment programmes are:

- High-Performance Sheep Systems
  - Research to maximise sheep production
  - Includes lamb genetics, reproductive efficiency survivability and growth rate
- Forage and Nutrition
  - Tools to get maximum growth rate from pastures
  - Reducing intake of toxic endophytes
  - Improving hill country productivity

Meat Products and Quality

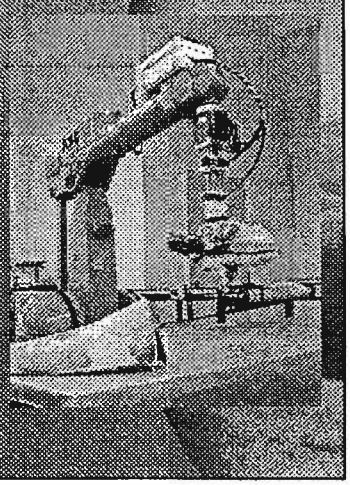
Major investment programmes are:

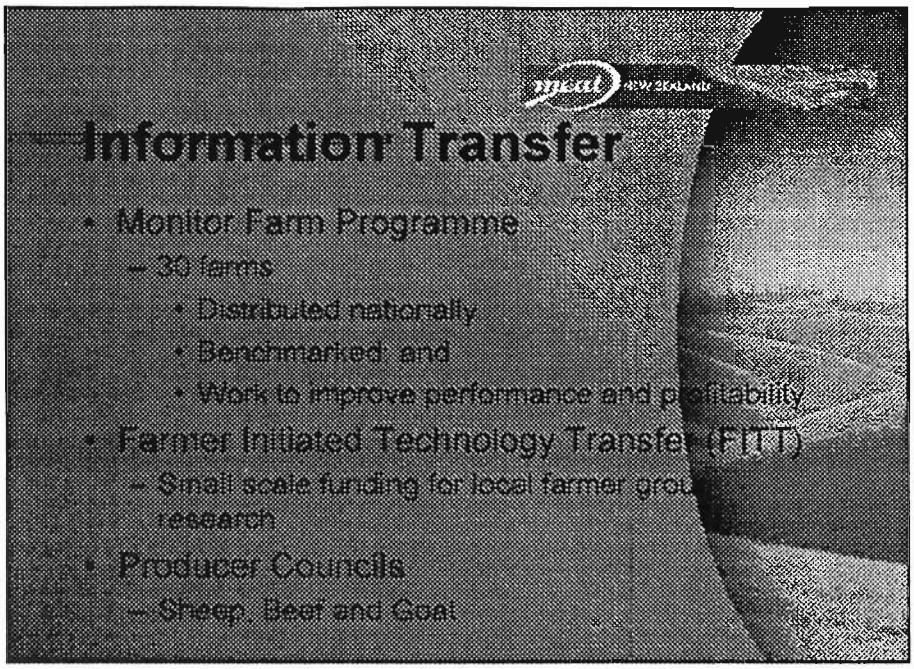
- Food Safety
- Meat Quality
- Meat Biologics Consortia
  - The consortia will develop new high-value products for human health and nutriceuticals

Processing and Harvesting Efficiency

Major investment programmes are:

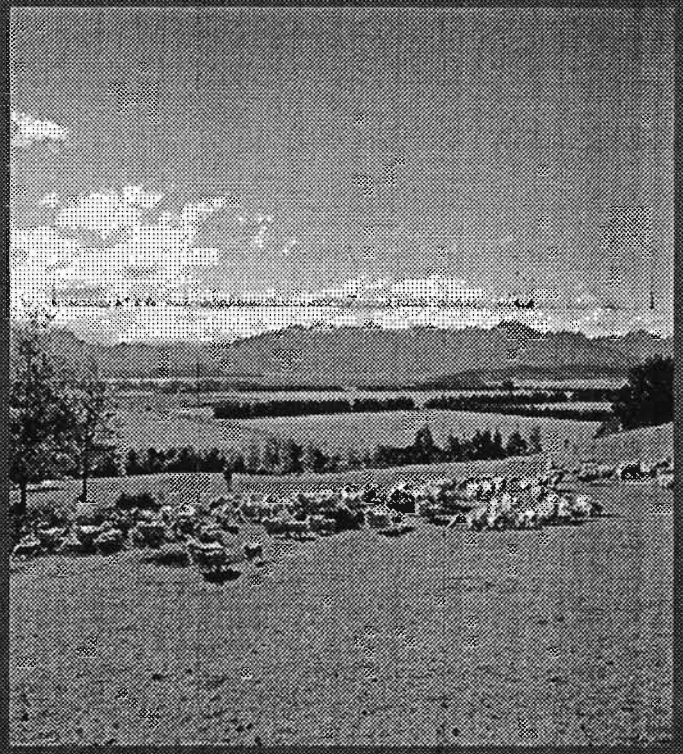
- De-pelting
  - Improved mechanical pelt removal
- Improved co-products returns
  - Improving edible quality
- Automation
  - Automated handling in the boning room

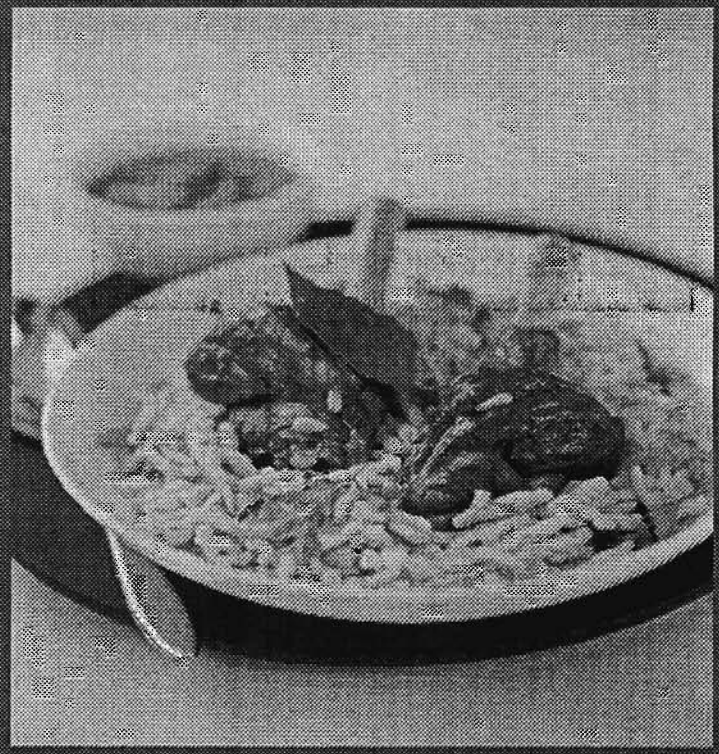



Information Transfer
• Monitor Farm Programme
– 30 farms
• Distributed nationally
• Benchmarked and
• Work to improve performance and profitability
• Farmer Initiated Technology Transfer (FITT)
– Small scale funding for local farmer grou
research
• Producer Councils
– Sheep, Beef and Goat

meat NEW ZEALAND

Situation and Outlook

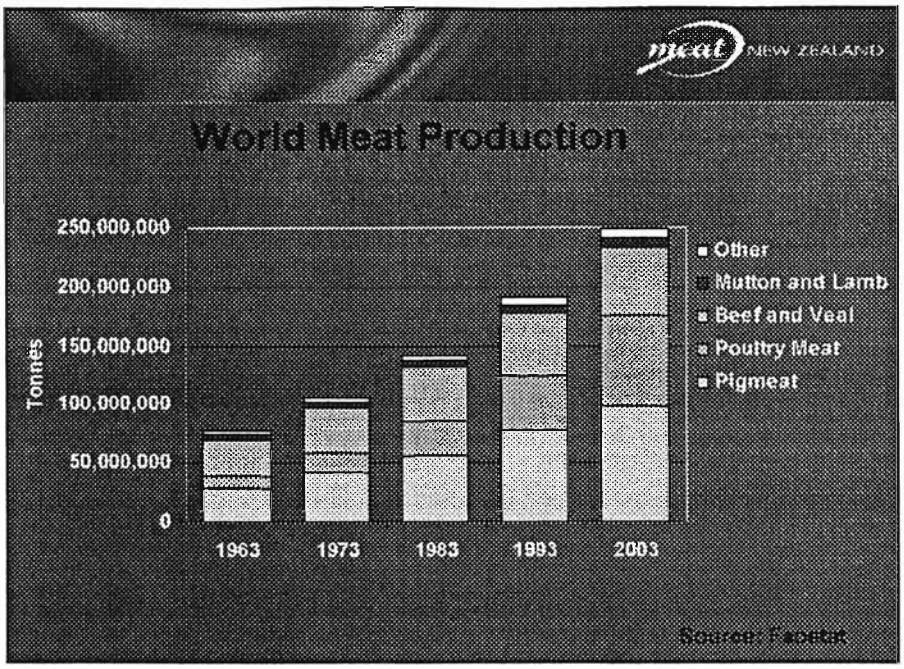


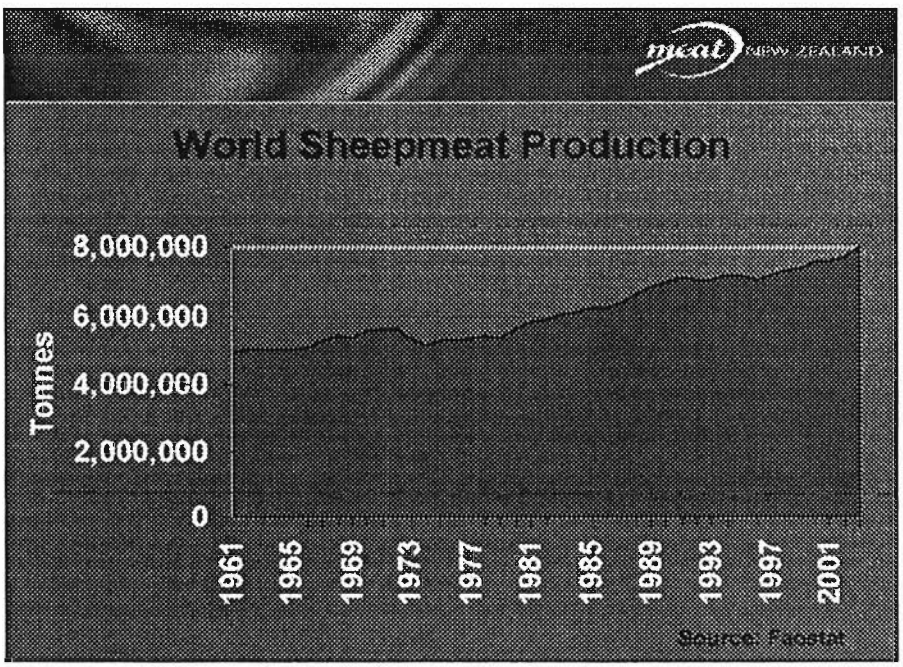


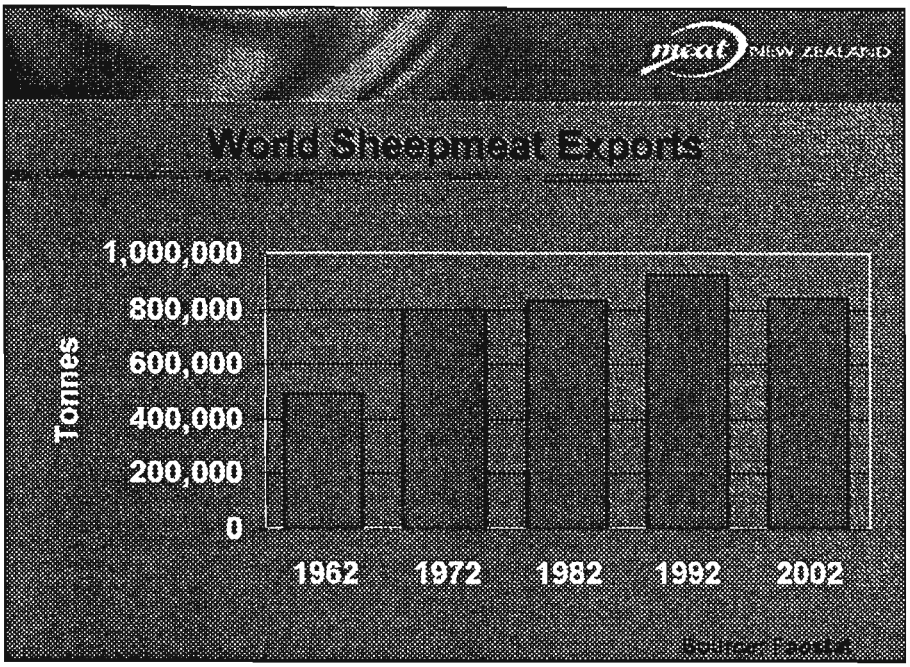
Situation and Outlook

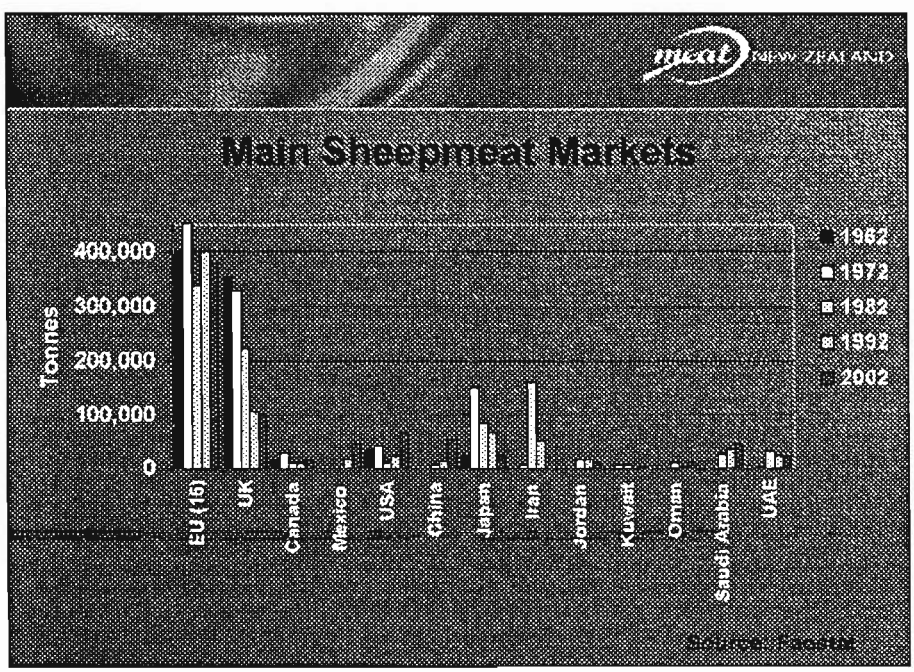
Introduction

- World Meat Production
- World Sheepmeat Production
- World Sheepmeat Exports
- Main Sheepmeat Markets
- World Sheepmeat Production by Country
- Lamb Consumption
- International Meat prices
- Distribution of World Population – the next 10 years
- Distribution of World Income – the next 10 years
- Producer Support Estimates (PSE)
- Country Overviews
- Summary


meat NEW ZEALAND
World Meat Production
250,000,000
200,000,000
150,000,000
100,000,000
50,000,000
0
Tonnes
1963
1973
1983
1993
2003
Other
Mutton and Lamb
Beef and Veal
Poultry Meat
Pigmeat
Source: Fapestat

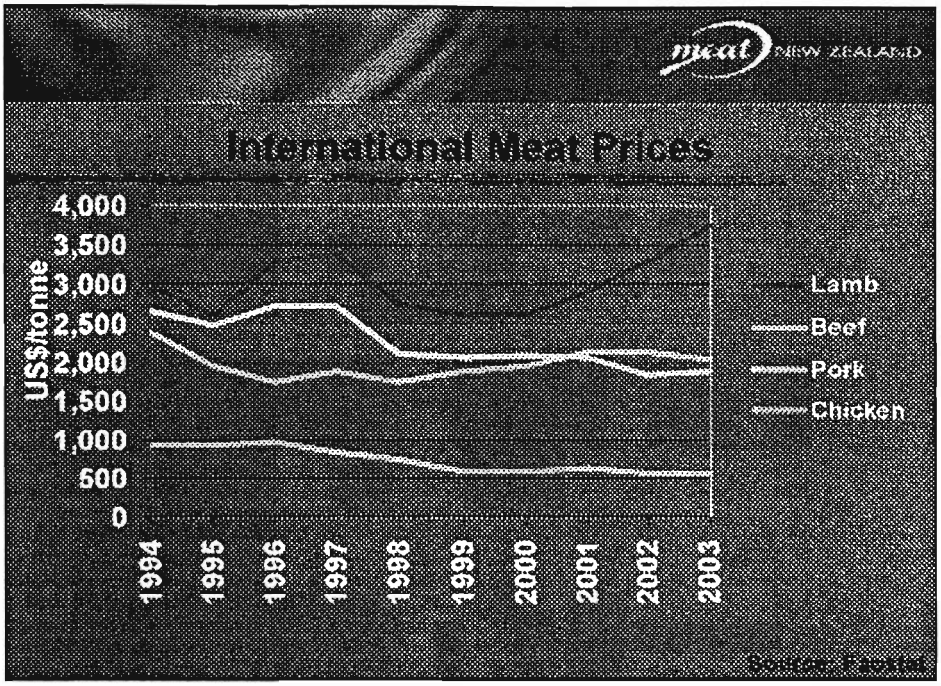

meat NEW ZEALAND
World Sheepmeat Production
8,000,000
6,000,000
4,000,000
2,000,000
0
Tonnes
1961
1965
1969
1973
1977
1981
1985
1989
1993
1997
2001
Source: Faostat

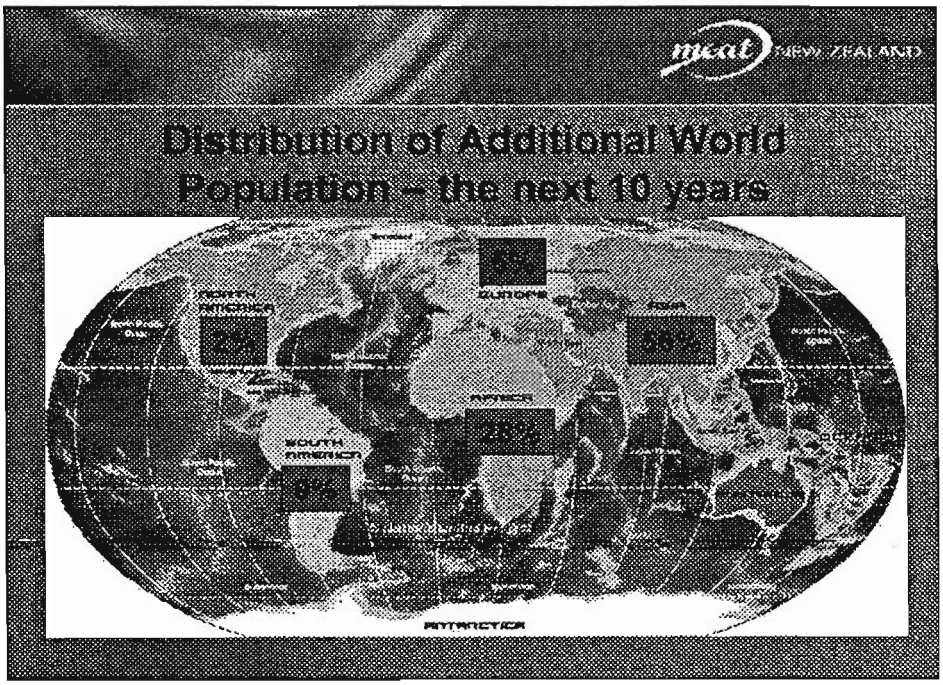

World Sheepmeat Exports
Tonnes
1,000,000
800,000
600,000
400,000
200,000
0
1962
1972
1982
1992
2002
Source: Faostat


Main Sheepmeat Markets
Tonnes
400,000
300,000
200,000
100,000
0
EU (15)
UK
Canada
Mexico
USA
China
Japan
Iran
Jordan
Kuwait
Oman
Saudi Arabia
UAE
1962
1972
1982
1992
2002
Source: Faostat

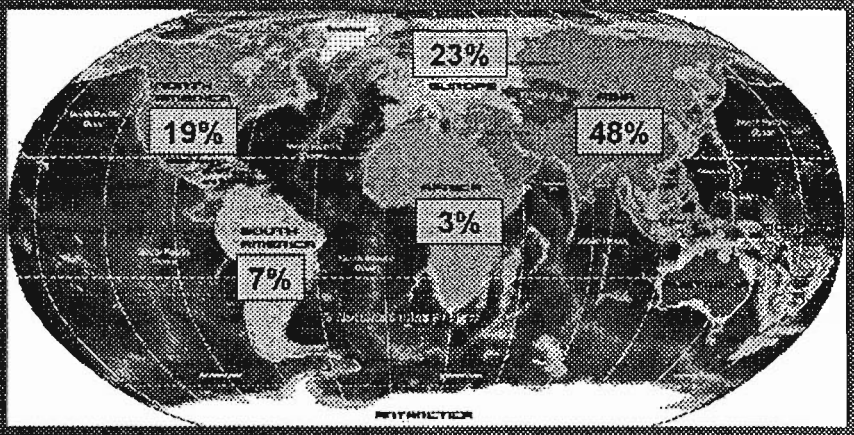
meat NEW ZEALAND
World Sheepmeat Production by Country
Tonnes
2,000,000
1,600,000
1,200,000
800,000
400,000
1963
1973
1983
1993
2003
China
EU (15)
Australia
New Zealand
Middle East
Argentina
USA
Uruguay
Source: Faostat

meat NEW ZEALAND
Per Capita Lamb Consumption
kg/capita
40
35
30
25
20
15
10
5
0
1990
2000
NZ
UAE
Australia
Kuwait
Greece
Uruguay
Ireland
UK
Saudi Arabia
Spain
Bulgaria
South Africa
China
Romania
Mexico
Argentina
India
Russia
US
Japan
Source: MHR Viandes


meat NEW ZEALAND
International Meat Prices
US$/tonne
4,000
3,500
3,000
2,500
2,000
1,500
1,000
500
0
1994
1995
1996
1997
1998
1999
2000
2001
2002
2003
Lamb
Beef
Pork
Chicken
Source: Factfish


meat NEW ZEALAND
Distribution of Additional World Population – the next 10 years
5%
EUROPE
2%
56%
ASIA
28%
AFRICA
9%
SOUTH AMERICA
ANTARCTICA

Distribution of Additional World Income – the next 10 years

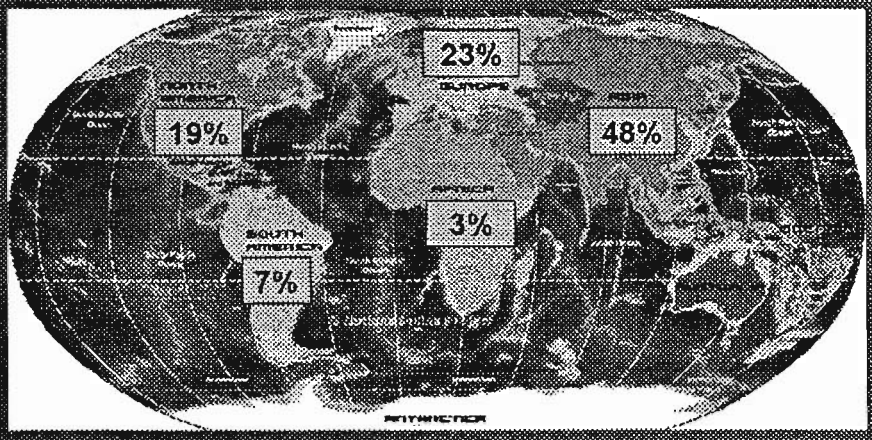


Producer Support Estimate (PSE)

	EU	US	OECD
Sheepmeat	36%	19%	27%
Poultry	36%	6%	18%
Pork	26%	5%	24%
Beef and veal	78%	8%	37%

Source: OECD PSE/CSE Database 2003

Distribution of Additional World Income – the next 10 years

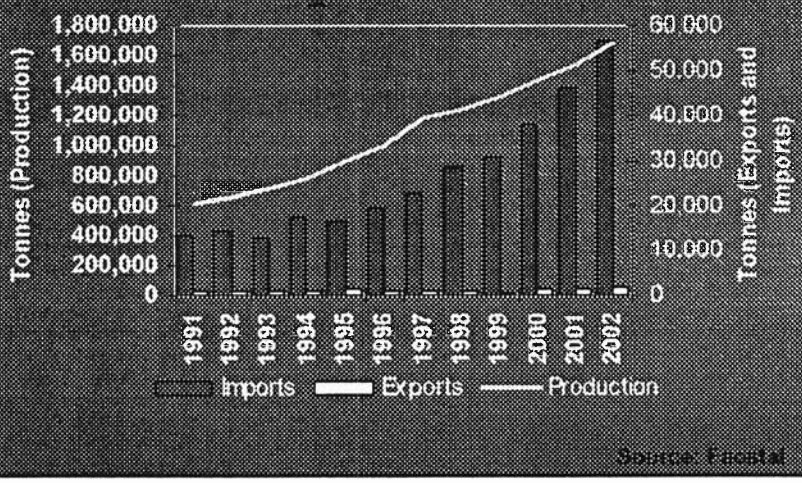


Producer Support Estimate (PSE)

	EU	US	OECD
Sheepmeat	36%	18%	27%
Poultry	38%	6%	18%
Pork	26%	5%	24%
Beef and veal	79%	5%	37%

Source: OECD PSE/CSE Database 2005

China



Source: Faostat

Australia

- Smallest sheep flock since 1945
- Drought has continued to affect many areas
- Lamb slaughter and production in 2003/04 down 9%
- Shift into dairy production
- Outlook
  - Sheep numbers down further in 2004
    - then increase by 1-2% p.a.
  - Continued shift to lamb production
  - Domestic consumption increases by 30% by 2007
  - Lamb exports grow by 57% to 2007
  - Live sheep exports stable at 5-6m

New Zealand

- Lowest sheep numbers in 48 years
- Spring 2003 Lambing
  - Drought affected, but still second highest on record
  - Lambs born - down 5%
- Lamb slaughter and production in 2003/04
  - Down 8%
  - Lowest since mid 1990s
- Outlook
  - Steady sheep numbers
  - Slight increase in breeding ewes
  - Small increases in production
  - Returns dominated by value of NZD

European Union

- December 2003 sheep census – decline around 1%
- Largest flocks

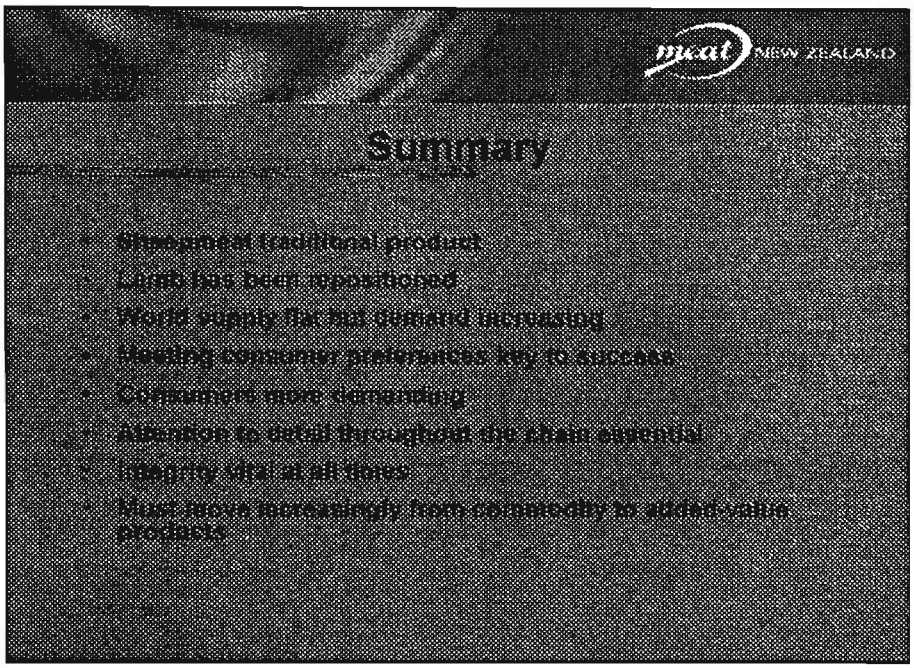
UK	-1% in total	-<1% breeding ewes
Spain	-2% in total	-4% breeding ewes
France	-2% in total	-3% breeding ewes
Italy	down slightly	
Ireland/Portugal	Steady	
Hungary	+16% to 1.3m	

European Union (continued)

- Outlook - influenced by:
  - Tight supplies
  - Rebuilding of flocks post-FMD
  - Impact of CAP reform
  - EU enlargement – minimal impact on production
  - Beef intervention stocks

United States

- Sheep numbers continue to decline
- Lamb consumption is low … but steady – per capita
- Imports offset declining production
- Live lamb prices strong, but input prices high – lambs and feed
- Outlook
  - Economic recovery
  - Continued strong lamb meat prices, competition from AU and NZ
  - Impact of LMAAP
  - Challenges in identifying markets for diversification/segmentation


meat NEW ZEALAND
Summary
Strengthen traditional product
Lamb has been repositioned
World supply tight, but demand increasing
Meeting consumer preferences key to success
Consumers more demanding
Attention to detail throughout the chain essential
Integrity vital at all times
Must move increasingly from commodity to added-value products

DNA TRACEABILITY IN PORK PRODUCTION

Dr. John Webb, BSc PhD FIBiol CBiol
Director, Genetics and Science

Maple Leaf Foods Inc, 30 St Clair Avenue West, Toronto, Ontario M4V 3A2

Introduction

The benefit of Maple Leaf s DNA-based traceability system is the ability to track pork products from grocer s shelf back to the farm of origin through each step in the value chain. The value chain can be divided into three main components: live animal, processing, and distribution and sales. Although yet to be implemented in most countries, Current tracking systems rely on the use of animal tags, tattoos and computerized bar coded labels to rack live animals. However these methods break down when it comes to effectively tracking individual meat products through the processing and distribution phase. What is required, and what the Maple Leaf system delivers, is a reliable, cost effective method of tracing pork products through the entire value chain.

The need for traceability in meat products is being driven by a number of factors including:

- Increasing global concern over food safety
- The need for zoning in the event of epidemic animal disease
- Tracking the source of drug residues
- Recall in the event of contamination (eg pesticides)
- Feedback to allow quality control
- Protection against bioterrorism
- Establishing a Made in Canada brand based on food safety assurance

Maple Leaf, working in cooperation with industry partners, Pyxis Genomics, Orchid BioScience, and IBM Canada, has developed a system that allows tracking of a finished pork product back to the farm origin using nature s bar code — DNA.

The Road to Discovery

Maple Leaf Foods traceability product is based on a gene panel discovered by Pyxis Genomics. The gene panel contains 80 single nucleotide polymorphisms or SNPs or (snips).

DNA-based tracking systems for meat exploit natural variations in the DNA code, which is made up of just four units or *nucleotides* (A=adenosine, C=cytosine, G=guanidine, T=thymidine). There are two major types of systems: the first uses restriction fragment length polymorphisms (RFLPs), and the second uses single nucleotide polymorphisms SNPs.

RFLPs are fragments of DNA of varying length that can be separated by gel electrophoresis. They are created by an enzyme that cuts the DNA at a particular

recognition site. They identify repetitive sequences of DNA that are naturally variable so that, for example, some individuals may be ACACAC while others are ACAC . The disadvantage is that these fragments can be difficult to interpret.

Unlike, RFLPs that are fragments or sequences of DNA, SNPs are single units of the code that vary naturally, so that some animals may be A while others are C. For example, the halothane gene A to T mutation, causing pale watery pork, is one such SNP. SNPs are like a binary code, the code is either present or it is not. SNPs offer greater precision in matching making them the preferred solution for the long term.

Developing the DNA traceability panel

In 2003, Maple Leaf contracted Pyxis Genomics to identify a panel of SNPs that would trace finished pork products back to the mother of the slaughter pig. This is done by matching the SNPs on the maternal chromosomes in the meat back to the mother. This maternal approach makes sense, as artificial insemination is commonly used in pig breeding and one sire can be used across a large number of locations. The sire, therefore, gives no information as to the farm of origin.

To begin, blood samples were collected from a range of breeds representing a cross section of those commonly used in meat production around the world. Pyxis then determined which SNPs were most informative. From a short list of more than 300 SNPs, Pyxis identified a panel of approximately 80 SNPs that would accurately track to the mother. This was possible by selecting SNPs grouped close together on the same chromosome, and by using mitochondrial nuclear DNA that is maternally inherited only in the cytoplasm of the egg.

How DNA tracing works in practice

At the farm level, each time a mother pig (gilt or young sow) enters commercial production, a blood sample is DNA-typed for the SNP panel and the identity information entered in a database. Producers receive bar-coded blood tubes, together with a CD-ROM containing the details of Internet access. The breeding female s identity is written on a sheet beside the barcode, and sent with the tubes to the DNA lab. The lab types the sample and enters the mother s DNA genotype and farm into the database. The producer updates the database directly with farrowing date (birthing date) and culling date.

To verify the origin, meat samples are sent to the laboratory, and the DNA genotype is entered into the database. Meat is then matched to the mother s identity, which indicates the breeding farm and date of birth of the progeny. A computer search engine, developed by IBM in collaboration with Maple Leaf information systems specialists, does the matching. A live animal tracking system will then link to the nursery barn, finisher barn, and from there to transport and the slaughter plant. The live animal tracking system is thus an essential part of full traceability, and is complementary to DNA traceability.

Genetic improvement

The ability to track to the mother of slaughter pigs also has valuable implications for genetic improvement through natural selection. The genetic heritage of meat that is either defective or of excellent quality can be identified. The system can be used to track back through multiplication to animals in the breeding herd that should be selected as parents of the next generation. Individual SNPs within the traceability panel may also show associations with performance and meat quality traits. In this case the SNPs would most probably be acting as genetic markers for nearby genes affecting production traits (*quantitative trait loci* or QTLs). Using current mapping techniques this can lead to the identification of SNPs actually within the functional gene, so-called *quantitative trait nucleotides* (QTNs). In the purebred breeding lines, the QTNs then allow direct selection on performance traits.

Next steps

Maple Leaf and Pyxis Genomics have successfully developed a panel of DNA single nucleotide polymorphisms. They are now ready to move forward with the first commercial application of the product, the focus of which will be to provide full traceability of pork products to the Japanese market. Typing of breeding sows will begin in the spring of 2004 and the first products with full traceability will be available in the fourth quarter of 2004.

Initially, the DNA panel will be used for quality control and as proof of origin essential in overseas markets such as Japan. Within 12 months, it will also be used to identify genetic markers for meat quality traits that can be used for natural selection in purebred nucleus populations.

Summary

Complete traceability of meat products, back to the farm of origin has been the holy grail of the meat processing industry. Over the past six months, the need to be able to demonstrate this ability has increased significantly.

Traceability offers a key point of difference for Canadian producers. After a six-month exclusivity period, the DNA panel will be available to the entire Canadian pork industry. The technology could be adapted for other species within three to four months.

Canada has long been known as an excellent producer of safe, high-quality food. This quality reputation has been damaged in international markets with the finding of a single case of BSE. The DNA-based traceability system developed by Maple Leaf and Pyxis is highly accurate and will raise the bar on food safety assurance and serve to deliver the level of accountability needed to build Canada s reputation as a provider of safe, wholesome food to the world.

Adrián Catrileo Sánchez

De: "Adrián Catrileo Sánchez" <acatrile@carillanca.inia.cl>
Para: "Lilian Avendaño Fuentes" <lavendan@carillanca.inia.cl>
Enviado: miércoles, 04 de agosto de 2004 10:02
Asunto: Re: ARTICULOS TA ESPECIAL DE CARNE

From:
To:
Cc:
Sent: Tuesday, August 03, 2004 9:56 AM
Subject: ARTICULOS TA ESPECIAL DE CARNE

Estimados:

Les estoy enviando en este minuto los artículos para el especial de carne de Tierra Adentro. Los temas a despachar son 6,según el siguiente detalle:

1) Visita a Australia de V. Valencia (con fotos)
2) Congreso Mundial de la carne de A. Catrileo (con fotos)
3) Reemplazo de guano de pollo en raciones de engorda de C. Rojas (con fotos)
4) Pastoreo en Franjas de S. Iraira (con fotos)
5) Potencialidad Ovina de C. Hepp (fotos pendientes)
6) Logro Institucional (con fotos)

Muchos saludos

Lilian Avendaño Fuentes
Periodista INIA Carillanca
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El MERCADO GLOBAL DE LA CARNE: ANTECEDENTES DEL CONGRESO MUNDIAL REALIZADO EN WINNIPEG, CANADA 14-17 JUNIO, 2004.

Adrián Catrileo Ing. Agr. MSc. PhD.
Depto. Producción Animal, INIA Carillanca

De acuerdo con antecedentes entregados en el Congreso Mundial de Carne, realizado en Winnipeg, Canadá, el mercado global de la producción de carne se ha caracterizado en la última década por uno de los más altos consumos y crecimiento comercial de la mayoría de las materias primas agrícolas. Un creciente numero de consumidores proactivos por la calidad, especialmente en Europa, ha empujado una mayor demanda de productos con mayor valor agregado y cortes especializados (Cuadro 1).

Cuadro 1. Desarrollo de marcas en productos de carne vacuna en Francia (en toneladas de peso de carcasa equivalente).

Marca/ Sello	1993	1997	1999	2000	2001
Red Label	14.800	23.000	23.600	25.600	30.700
Orgánicos		inicio	3.000	4.000	5.200
Productos certificados	inicio	137.000	143.000	146.200	147.700

Fuente: ADIV- France

Entre los factores que han influenciado el comercio y la producción global de carnes, pueden ser destacados a) los cambios estructurales en la industria de la carne, incluyendo la genética, la estabulación de los animales y un mejor manejo, lo cual se ha debido en parte al cruce de fronteras de la tecnología y de flujos de inversión en la industria, en particular en regiones con menores costos de producción, b) Cambios en las políticas de comercio, las cuales luego de la implementación de medidas de la Organización Mundial de Comercio han llevado a fomentar una reducción de los subsidios de exportación y han favorecido una expansión a varios mercados. Con ello se ha aumentado la participación de países en desarrollo en el mercado internacional como exportadores. Se prevé que esta tendencia continuará en la próxima década y c) La creciente inestabilidad de los mercados de la carne como resultado de la aparición de enfermedades como la BSE (vaca loca) y residuos de antibióticos, que pueden contaminar los alimentos de consumo humano Esta situación ha provocado cierre de fronteras a los países con detección de estas enfermedades, influenciando los precios. Los temas de salud animal y humana, como aquellos relacionados con la calidad de los productos, se espera serán más complejos a futuro así como su tratamiento y prevención.

En efecto, el mejoramiento de los ingresos, la urbanización y cambios en los estilos de vida y preferencias de consumo, han aumentado fuertemente el consumo de carnes en general, principalmente, en los países en desarrollo. Esta mayor demanda ha favorecido a la industria del pollo y cerdo, cuyos productos han podido competir a precios más bajos que los cortes de vacuno. Tanto factores de salud como económicos (precios más bajos) han beneficiado a la industria avícola en su participación en el comercio mundial, la cual aumentó desde un 22% en 1990 a un 41% el 2003.

Por otro lado, en el 2004 los brotes de enfermedades animales (influenza aviar, casos de BSE en USA, Canadá) han afectado prácticamente un tercio de la exportación global ó 6 millones de toneladas . Ello ha derivado en cierre de los mercados desde países con enfermedades, contribuyendo a un aumento en los precios internacionales y a una mirada a países libres de enfermedades para importar carne, en especial desde Latinoamérica y Oceanía.

De acuerdo con análisis de la FAO, las expectativas de precios internacionales más altos de la carne son como resultado del alza de precios del año 2003. Así, el índice de precios FAO para el comercio de carne subió un 16%, debido a la limitada oferta y en donde los precios del pollo subieron un 42%, un 19% en el vacuno y un 8% en el cerdo. A pesar de la alta variabilidad de los precios ante escenarios con entrada y salida de enfermedades que afectan la disponibilidad de producto, se espera que los países libres de ellas, tanto en Latinoamérica como en Oceanía puedan aprovechar esta oportunidad. Sin embargo, las exportaciones desde Australia y Nueva Zelanda probablemente se verán restringidas el 2004 debido a un bajo inventario animal; por contraste, las exportaciones de carne desde Sudamérica pueden crecer un 6% el año 2004, con una participación en el mercado global de un 27%. Brasil se espera que exporte durante el presente año sobre 3,8 millones de toneladas de carnes, con una participación del 21% del comercio global.

El sector Bovino

La producción global de carne de vacuno se espera alcance 61,9 millones de ton en el 2004, Los bajos inventarios bovinos de Oceanía, el problema de la BSE en USA y un menor proteccionismo en Europa, han restringido la faena, con una consiguiente caída de alrededor de un 2% de producción de carne bovina en los países desarrollados. Por el contrario, la producción en los países en desarrollo se espera que aumente en un 3%, en especial en China, India, Corea y México.

Las exportaciones Norteamericanas, cercanas a 1,5 millones de ton (2003) y valoradas en US$4 billones, se espera que tendrán una caída de un 50%. Por su parte se espera una recuperación de las exportaciones de Canadá en la medida que USA levante las restricciones de frontera impuestas, medida que fue adoptada luego de la aparición de un caso de vaca loca en Alberta. En el mismo sentido, la demanda por carne desde países libres de enfermedades hará que desde Sudamérica exista un aumento de un 17% de los embarques, con Brasil como el principal proveedor.

Cuadro 2. Estadísticas de la Carne en el Mundo

	2002	2003	2004 *
	Millones de toneladas		
PRODUCCION	**246,3**	**250,4**	**253,6**
Ave	74,6	76,1	77,1
Cerdo	94,2	96,2	97,7
Vacuno	61,3	61,7	61,9
Ovino	11,8	12	12,4
Otros	4,5	4,5	4,5
EXPORTACIONES	**18,6**	**19,1**	**18,4**
Ave	7,8	7,9	7,6
Cerdo	3,8	4,2	4,3
Vacuno	9,9	9,9	5,6
Ovino	0,7	0,7	0,7
Otros	0,3	0,3	0,3

Fuente: FAO . (*) preliminar

El sector de la carne de ave

En relación a la carne de ave, se pronostica para el 2004 un aumento de sólo un 1% en relación al año previo. Debido a la influenza aviar, la producción de ave desde Asia caerá en un 2% ya que los países afectados Tailandia, Vietnam, Japón, Corea e Indonesia deben haber disminuido la dotación en al menos 100 millones de aves. La preocupación de los consumidores y la desconfianza han hecho que no obstante existir una recuperación en la producción no hay mejores expectativas debido a bajos precios y un alza en los costos de los alimentos. El consumo per capita en los países en desarrollo se espera disminuirá a 8,2 kg al año. A nivel global, el consumo por persona al año, que en los últimos 5 años tuvo un crecimiento anual de un 3%, se mantendrá estable en unos 12 kg/ persona (Cuadro 3).

Cuadro 3. Consumo de diferentes carnes en el mundo (kg persona año).

	2002	2003	2004 *
Consumo anual (por persona)	**39,8**	**39,9**	**39,9**
Carne de ave	12	12,1	12,2
Carne de cerdo	15,2	15,3	15,4
Vacuno	9,9	9,9	9,7
Ovinos	1,9	1,9	2
Otros	0,7	0,7	0,7

Fuente: FAO. (*) preliminar

El sector de la carne de cerdo

Por su parte, bajos retornos se espera en la producción de cerdos, dado el marco de altos precios de los alimentos, lo cual limitará la producción global en aproximadamente un 2%, con 97.7 millones de toneladas. Los precios del maíz y la soya han sufrido alzas de 20 y 65% respectivamente, comparados con el año anterior, lo cual ha influenciado en los costos de producción de la carne de cerdo. En Asia, zona que aporta con el 56% de la producción global y en donde la Influenza Aviar hizo mejorar los precios del cerdo, la producción esperada subirá sólo un 3%. Mientras el consumo sigue al alza en los países asiáticos y los países en desarrollo con 15 y 11,8 kg, respectivamente, se mantiene bastante menor a los 29,2 kg por persona en los países desarrollados.

El mercado del cerdo se ve, sin embargo, mejor que el de la carne de ave y de vacuno, con exportaciones que superarán las 4,3 millones de toneladas o 2% más altas que el último año. Gran parte de este crecimiento se espera que ocurra en Norteamérica, que tradicionalmente exporta cortes de alto valor al mercado asiático. De especial interés para México y Chile es la exportación de carne de cerdo ya que se espera un alza de los embarques luego de la firma de un TLC con Japón, donde existe una fuerte demanda para consumo interno que hará subir un 12% las importaciones o más.
El sector ovino

La producción global de carne ovina se espera que crezca un 3% en el 2004 con 12,4 millones de ton. Asia, que aporta más de la mitad de la producción mundial crecerá un 4%, en particular por el crecimiento de China. También se espera una recuperación en la producción de Australia, la Unión Europea y Nueva Zelanda. Se espera que el consumo aumente en un 2%. Los embarques desde Oceanía, que constituyen el 90% de la exportación mundial, han sido estimulados por un aumento de la demanda desde la UE, Norteamérica y México.

Los desafíos del sector carnes:

La complejidad del comercio mundial de la carne seguramente va a aumentar a futuro, en respuesta a las inquietudes de los consumidores, en cuanto a las formas en que la carne es producida y vendida. Aunque existe una clara demanda por carne, más que otro tipo de materias primas, el consumo anual tiende a mantenerse en un crecimiento de 2% al año, por debajo del 7% al cual creció en la década de los 90's.

El comercio más intenso de productos cárnicos, y la mayor intensificación de los sistemas productivos aumenta el riesgo de la aparición de enfermedades animales y zoonosis. Por otra parte, debido a un mayor control con esquemas "del gancho al plato", para calidad y seguridad, puede haber una proliferación de diferentes estándares para los alimentos, aseguramiento sanitario y certificación de procesos. Adicionalmente, la preocupación pública relacionada con el impacto de la producción intensiva de animales sobre el medio

ambiente y la forma en que son tratados y criados (bienestar animal) resultarán en una creciente legislación que afectará probablemente, la estructura de costos de la cadena.
Es evidente que calidad del producto y seguridad serán claves para el éxito. En los nuevos escenarios deberá existir una mayor colaboración e interacción entre los productores, consumidores, las autoridades y la industria para aumentar la participación del rubro en los mercados mundiales.

Producción de los TOP TEN EN CARNE BOVINA

Carne Bovina (Miles ton)	**1983**	**2000**	**2001**	**2002**	**2003**	**2004**
MUNDO	**46.695**	**59.858**	**59.205**	**61.284**	**61.607**	**61.896**
Países Desarrollados	23.625	30.063	29.515	30.197	29.728	29.088
Países en Desarrollo	23.071	29.795	29.690	31.087	31.959	32.810
USA	10.584	12.295	11.983	12.427	12.042	11.510
EU(15)	0	7.437	7.363	7.541	7.440	7.290
BRASIL	4.807	6.540	6.671	7.136	7.385	7.570
CHINA	2.336	5.326	5.488	5.846	6.130	6.500
C.I.S (12)	6.543	3.888	3.763	3.977	4.034	3.919
INDIA	2.632	2.863	2.881	2.906	2.961	3.060
ARGENTINA	2.805	2.716	2.452	2.700	2.800	2.650
AUSTRALIA	1.826	1.988	2.119	2.028	1.935	1.900
MEXICO	1.256	1.409	1.445	1.451	1.452	1.520
CANADA	860	1.264	1.250	1.272	1.245	1.450
OTROS	13.044	14.125	13.792	14.000	14.262	14.529

DESTACADOS

OCEANÍA:
Una posición única e envidiable:
Libre de enfermedades (Fiebre Aftosa y BSE)
Buenos sistemas de trazabilidad
Exportaciones bien orientadas: bovinos y corderos
La producción de carne bovina se beneficia dada su cercanía a mercados de alto consumo y producción bovina a bajos costos (pradera)
Oceanía domina el mercado del cordero, un producto dirigido a nichos de mercado

CHINA:
Cambia los patrones de consumo (hacia proteína de origen animal)
Gran aumento en el consumo
Rápida occidentalización y cambio en los patrones de consumo
La pobre salud animal y baja infraestructura son las mayores limitantes
Alto mercado doméstico y bajos costos son atractivos para la inversión extranjera

EUROPA
Golpeada por las enfermedades del ganado (Fiebre Aftosa, BSE)
El sector de carnes rojas ha perdido competitividad nacional e internacionalmente
Aumento fuerte de las regulaciones de bienestar animal y medio ambiente
Bajo estimulo la producción intensiva de animales

BRASIL
Emerge como un nuevo exportador de carnes rojas
La prevención en el control de la Fiebre Aftosa está dando frutos
La exportación de carne bovina aumentó en 284% desde los niveles de 1998.
La exportación de cerdos aumentó 5-7 veces en los últimos 5 años
Alto potencial para exportación

NORTEAMÉRICA
La aparición de BSE afecta la unidad de producción de la carne de Norteamérica
La imagen internacional de carne vacuna saludable de Norteamérica cambió después de la BSE
Presión internacional para implementar nuevos y más caros controles para la BSE
Se mantienen medidas proteccionistas para el sector

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El autor es actualmente investigador del Depto. de Producción Animal del Instituto de Investigaciones Agropecuarias (INIA) en la IX Región. CRI Carillanca

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Enviado: miércoles, 04 de agosto de 2004 9:26
Adjuntar: Art.Cong.Canada(Intercampo).doc
Asunto: articulo para Intercampo

Estimada Claudia:
De acuerdo a lo conversado, te adjunto artículo sobre el Congreso Mundial de Carne 2004, realizado en Canadá y al cual tuve oportunidad de asistir. Con ello espero difundir y contribuir con información actualizada del sector a los lectores de la revista.

Favor acusar recibo del mail.

Atentamente,

Adrián Catrileo
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Depto. Producción Animal
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ANTECEDENTES DEL CONGRESO MUNDIAL REALIZADO EN WINNIPEG, CANADA 14-17 JUNIO, 2004.

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Depto. Producción Animal, INIA Carillanca

De acuerdo con antecedentes entregados por diferentes expositores en el Congreso Mundial de Carne, realizado en Winnipeg, Canadá, el mercado global de la producción de carne se ha caracterizado en la última década por uno de los más altos consumos y crecimiento comercial de la mayoría de las materias primas agrícolas. Un creciente numero de consumidores proactivos por la calidad, especialmente en Europa, ha empujado una mayor demanda de productos con mayor valor agregado y cortes especializados.

Entre los factores que han influenciado el comercio y la producción global de carnes, pueden ser destacados:

a) **Cambios estructurales en la industria de la carne**, incluyendo la genética, la estabulación de los animales y un mejor manejo, lo cual se ha debido en parte al cruce de fronteras de la tecnología y de flujos de inversión en la industria, en particular en regiones con menores costos de producción,

b) **Cambios en las políticas de comercio,** las cuales luego de la implementación de medidas de la Organización Mundial de Comercio (Ronda de Doha, Qatar) han llevado a fomentar una reducción de los subsidios de exportación y han favorecido una expansión a varios mercados, en especial se ha aumentado la participación de países en desarrollo en el mercado internacional como exportadores. Se prevé que esta tendencia continuará en la próxima década y

c) **La creciente inestabilidad de los mercados** de la carne como resultado de la aparición de enfermedades como la BSE (vaca loca) y residuos de antibióticos, que pueden contaminar los alimentos de consumo humano Esta situación ha provocado cierre de fronteras a los países con detección de estas enfermedades, influenciando los precios. Los temas de salud animal y humana, como aquellos relacionados con la calidad de los productos, se espera serán más complejos a futuro así como su tratamiento y prevención.

El mejoramiento de los ingresos, la urbanización y cambios en los estilos de vida y preferencias de consumo, han aumentado fuertemente el consumo de carnes en general, principalmente, en los países en desarrollo, especialmente por productos con valor agregado, donde cada vez es más solicitada la marca o sello en los productos. En algunos países ello ha tenido un fuerte desarrollo (Cuadro 1). Esta mayor demanda ha favorecido a la industria del pollo y cerdo, cuyos productos han podido competir a precios más bajos que los cortes de vacuno. Tanto factores de salud como económicos (precios más bajos) han beneficiado a la industria avícola en su participación en el comercio mundial, la cual aumentó desde un 22% en 1990 a un 41% el 2003.

Cuadro 1. Desarrollo de marcas en productos de carne vacuna en Francia (en toneladas de peso de carcasa equivalente).

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Orgánicos		inicio	3.000	4.000	5.200
Productos certificados	inicio	137.000	143.000	146.200	147.700

Fuente: ADIV- France

LA PRODUCCIÓN DE CARNE POR SECTORES

El sector Bovino

La producción global de carne de vacuno se espera alcance 61,9 millones de ton en el 2004, Los bajos inventarios bovinos y ovinos de Oceanía, el problema de la BSE en USA y un menor proteccionismo en Europa, han restringido la faena, con una consiguiente caída de alrededor de un 2% de producción de carne bovina en los países desarrollados. Por el contrario, la producción en los países en desarrollo se espera que aumente en un 3%, en especial en China, India, Corea y México.

La demanda por carne desde países libres de enfermedades hará que desde Sudamérica exista un aumento de un 17% de los embarques, con Brasil como el principal proveedor.

Cuadro 2. Estadísticas de la Carne en el Mundo

	2002	2003	2004 *
	Millones de toneladas		
PRODUCCION	**246,3**	**250,4**	**253,6**
Ave	74,6	76,1	77,1
Cerdo	94,2	96,2	97,7
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Ovino	11,8	12	12,4
Otros	4,5	4,5	4,5
EXPORTACIONES	**18,6**	**19,1**	**18,4**
Ave	7,8	7,9	7,6
Cerdo	3,8	4,2	4,3
Vacuno	9,9	9,9	5,6
Ovino	0,7	0,7	0,7
Otros	0,3	0,3	0,3

Fuente: FAO . (*) preliminar

El sector de la carne de ave

La preocupación de los consumidores y la desconfianza han hecho que no obstante existir una recuperación en la producción no hay mejores expectativas debido a bajos precios y un alza en los costos de los alimentos. El consumo per capita en los países en desarrollo se espera disminuirá a 8,2 kg al año. A nivel global, el consumo por persona al año, que en los últimos 5 años tuvo un crecimiento anual de un 3%, se mantendrá estable en unos 12 kg/ persona (Cuadro 3), casi la mitad del consumo total de carnes que se realiza en promedio en el mundo.

Hay que recordar que en Chile el consumo total de carne llegó el año pasado a 70 kg per cápita año, de los cuales alrededor de 22 kg corresponden a carne de vacuno, 29 kg a carne de ave, 18 kg a carne de cerdo y 0,4 kg a ovinos.

Cuadro 3. Consumo de diferentes carnes en el mundo (kg persona año).

	2002	2003	2004 *
Consumo anual (por persona)	**39,8**	**39,9**	**39,9**
Carne de ave	12	12,1	12,2
Carne de cerdo	15,2	15,3	15,4
Vacuno	9,9	9,9	9,7
Ovinos	1,9	1,9	2
Otros	0,7	0,7	0,7

Fuente: FAO. (*) preliminar

El sector de la carne de cerdo

Por su parte, bajos retornos se espera en la producción de cerdos, dado el marco de altos precios de los alimentos, lo cual limitará la producción global en aproximadamente un 2%, Los precios del maíz y la soya han sufrido alzas de 20 y 65% respectivamente, comparados con el año anterior, lo cual ha influenciado en los costos de producción de la carne de cerdo. Mientras el consumo sigue al alza en los países asiáticos y los países en desarrollo con 15 y 11,8 kg, respectivamente, se mantiene bastante menor a los 29,2 kg por persona en los países desarrollados.

De especial interés para México y Chile es la exportación de carne de cerdo ya que se espera un alza de los embarques luego de la firma de un TLC con Japón, donde existe una fuerte demanda para consumo interno que hará subir un 12% las importaciones o más.

El sector ovino

La producción global de carne ovina se espera que crezca un 3% en el 2004. Asia, que aporta más de la mitad de la producción mundial crecerá un 4%, en particular por el crecimiento de China. También se espera una recuperación en la producción de Australia y

Nueva Zelanda, cuyos inventarios de stock son los más bajos en 40 años debido a sequías recurrentes. Se espera que el consumo aumente en un 2%. Los embarques desde Oceanía. que constituyen el 90% de la exportación mundial, han sido estimulados por un aumento de la demanda desde la UE, Norteamérica y México, en donde se ha ido posicionando fuertemente la carne de cordero en nichos de mercado de alto valor.

Los desafíos del sector carnes

La complejidad del comercio mundial de la carne seguramente va a aumentar a futuro, en respuesta a las inquietudes de los consumidores y, en cuanto a las formas en que la carne es producida y vendida. Aunque existe una clara demanda por carne, el consumo anual tiende a mantenerse en un crecimiento de 2% al año, aunque a menor ritmo al cual creció (7%) en la década de los 90's.

El comercio más intenso de productos cárnicos, y la mayor intensificación de los sistemas productivos aumenta el riesgo de la aparición de enfermedades animales y zoonosis. Por otra parte, debido a un mayor control con esquemas "del gancho al plato", para calidad y seguridad, puede haber una proliferación de diferentes estándares para los alimentos, aseguramiento sanitario y certificación de procesos. Adicionalmente, la preocupación pública relacionada con el impacto de la producción intensiva de animales sobre el medio ambiente y la forma en que son tratados y criados (bienestar animal) resultarán en una creciente legislación que afectará probablemente, la estructura de costos de la cadena.
Es evidente que calidad del producto y seguridad serán claves para el éxito. En los nuevos escenarios deberá existir una mayor colaboración e interacción entre los productores, consumidores, las autoridades y la industria para aumentar la participación del rubro en los mercados mundiales.

DESTACADOS

OCEANÍA:
Una posición única e envidiable:
Libre de enfermedades (Fiebre Aftosa y BSE)
Buenos sistemas de trazabilidad (implementándose en forma masiva)
Exportaciones bien orientadas: bovinos y corderos
La producción de carne bovina se beneficia dada su cercanía a mercados de alto consumo y producción bovina a bajos costos (pradera)
Oceanía domina el mercado del cordero, un producto dirigido a nichos de mercado

CHINA:
Cambia los patrones de consumo (hacia proteína de origen animal)
Gran aumento en el consumo
Rápida occidentalización y cambio en los patrones de consumo
La pobre salud animal y baja infraestructura son las mayores limitantes
Alto mercado doméstico y bajos costos son atractivos para la inversión extranjera

EUROPA
Golpeada por las enfermedades del ganado (Fiebre Aftosa, BSE)
El sector de carnes rojas ha perdido competitividad nacional e internacionalmente
Aumento fuerte de las regulaciones de bienestar animal y medio ambiente
Bajo estimulo la producción intensiva de animales

BRASIL
Emerge como el principal exportador de carnes rojas
La prevención en el control de la Fiebre Aftosa está dando frutos
La exportación de carne bovina aumentó en 284% desde los niveles de 1998.
La exportación de cerdos aumentó 5-7 veces en los últimos 5 años
Alto potencial para exportación

NORTEAMÉRICA
La aparición de BSE (Canadá y USA) afecta la unidad de producción de la carne de Norteamérica
La imagen internacional de carne vacuna saludable de Norteamérica cambió después de la BSE
Presión internacional para implementar nuevos y más caros controles para la BSE
Se mantienen medidas proteccionistas para el sector

Literatura consultada:

Morgan,N. 2004. The Global Meat Economy. Outlook and Issues for the Beef and Pork Industries. WMC-Winnipeg, Canadá. ESCB/FAO.

Food Outlook. 2004. Global Information and Early warning system on Food and Agriculture. FAO. N°2. June 2004.

Rabobank International.

GIRA International market.

Agradecimientos
La asistencia del autor fue posible al apoyo en financiamiento por parte del Fondo para la Innovación Agraria (FIA), a través de la propuesta *FIA-FP-L-2004-1-P-016.*.
El autor es actualmente investigador del Depto. de Producción Animal del Instituto de Investigaciones Agropecuarias (INIA) en la IX Región. CRI Carillanca.

GOBIERNO DE CHILE
MINISTERIO DE AGRICULTURA
INIA CARILLANCA

GOBIERNO DE CHILE
FUNDACION PARA LA
INNOVACION AGRARIA

FERNANDO ORTEGA K., *Director Regional de INIA Carillanca y la Fundación para la Innovación Agraria (FIA) en conjunto con la Sociedad de Fomento Agrícola de Temuco A.G. (SOFO), tienen el agrado de invitar a Ud. a una charla de los Sres. Adrián Catrileo S., Ing. Agr. PhD, de INIA Carillanca y Claus Köbrich G., Méd. Vet. PhD., de la Facultad Ciencias Veterinarias Universidad de Chile, participantes en la Actividad de Formación* ***"Congreso Mundial de Carne 2004"****, realizado en Canadá en el mes de junio, para dar a conocer la información, tendencias del mercado y antecedentes de producción de carne en el mundo, obtenidos a través de la asistencia a dicha actividad. La participación en el Congreso mencionado contó con el apoyo del Programa de Formación de la Fundación para la Innovación Agraria (FIA) y fue coordinada por ambas entidades participantes.*

La charla de difusión se realizará el día Viernes 30 de Julio de 2004 en la Sala de Conferencias del Parque de Exposiciones Charles Caminondo E. (entrada norte de Temuco) de 15:00 a 18:30 horas.

Para mayores antecedentes, comunicarse con la Srta. Raquel Romero R., secretaria del Depto. Producción Animal INIA Carillanca. Le rogamos confirmar su asistencia al teléfono 45-215706 (259) para una mejor organización de esta actividad.

Agradecemos su asistencia y la difusión de esta invitación a los interesados que usted conozca.

Temuco, Julio de 2004.

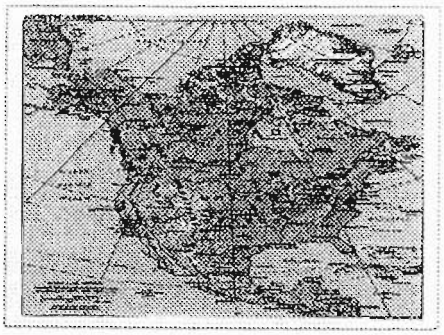
Congreso Mundial de la Carne 2004

Winnipeg, Canadá

Adrián Catrileo S.
Ingeniero Agrónomo MSc. PhD.
INIA Carillanca

Julio 2004

Winnipeg, Canadá

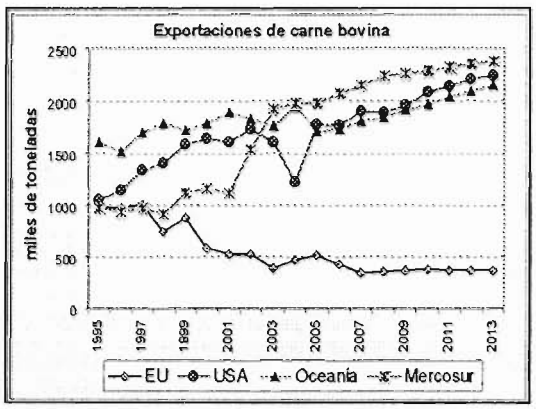


ANTECEDENTES GENERALES

- El crecimiento de los países estimulará la demanda por carnes
- Los precios futuros estarán limitados por:
  - una expansión moderada del mercado global y
  - la fuerte competencia de los países en vías de desarrollo
- Si las negociaciones de la Ronda de Doha son positivas, se espera:
  - reformas de políticas internas (subsidios y aranceles),
  - mejoraría en el mercado beneficiando a los países en vías de desarrollo
- El impacto actual de la BSE es fuerte, pero será moderado en el mediano plazo

ANTECEDENTES GENERALES.....*cont.*

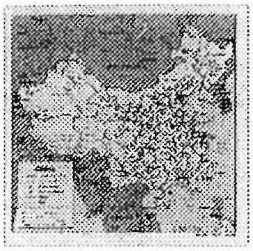
- Se espera que el efecto aftosa se minimice en el mediano plazo
- Existe un fuerte aumento de competencia para los países desarrollados, por parte de los países en vías de desarrollo
- El beneficio para el mercado bovino estará limitado por los bajos precios esperados para la carne de cerdo y de aves
- Sin embargo los precios de ovinos desde Oceanía subirán
- La UE tiende a transformarse en un importador neto
- Brasil se proyecta como el mayor exportador



OCEANÍA: OPORTUNIDAD ESTRATEGICA

- Un muy buen estándar sanitario (libre BSE y aftosa)
- Sistemas de capacidad de rastreo adecuados
- Exportación orientada sobre novillos, vaquillas y corderos
- La industria bovina se beneficia de la cercanía de los mercados y de bajo precio de producción de la carne de praderas
- Oceanía domina el mercado global del cordero, un nicho de alto precio
- Cercanos a los mercados asiáticos

CHINA: Cambio en el modelo de consumo (Proteína animal)



- Crecimiento explosivo en un consumo subsidiado
- Occidentalización rápida que cambia el modelo de consumo por carne
- La pobre salud animal y débil estructura de seguridad alimentaria, son grandes obstáculos
- Enorme mercado interior y factores productivos de bajo precio, son imanes para la inversión extranjera

EUROPA: Reducción en el consumo; impacto de enfermedades; disminución de exportaciones

- El sector carne ha perdido competencia en el interior de la UE.
- Regulaciones de bienestar animal y de ambiente cada vez más estrictas
- Opciones de políticas agrícolas que desalientan la ganadería intensiva
- Los nuevos países esperan estimular la industria de la carne, sin embargo ello se espera para el mediano o largo plazo

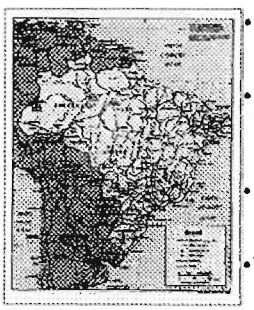
USA: Impacto de la BSE

- La percepción mundial de novillos norteamericanos muy sanos, ha sido cambiada post BSE
- Se desarrolló una fuerte presión internacional que conduce a la adopción de salvaguardas de alto costo, para demostrar protección ante la BSE
- Posturas más resistentes de los mercados mundiales aíslan a la industria del bovino de USA
- Medidas proteccionistas tales como congelado rápido, ganan rápidamente apoyo

Dinámica del Mercado Norteamericano:

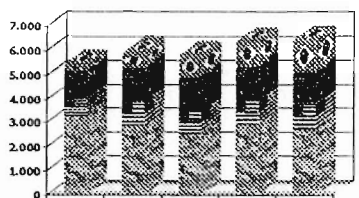
- La demanda creció en un 15% en los últimos 5 años
- En los últimos 5 años se ha desarrollado 1.600 nuevos productos
- La confianza del consumidor era muy alta (estaba en un 89% en diciembre del 2003)
- Aparecen dietas con altas proteínas y bajos carbohidratos, como factores que potencian el consumo

BRASIL: La nueva potencia en oferta mundial de carne



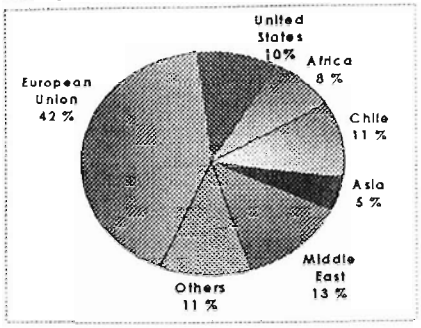
- **Existe un notorio progreso en la erradicación de Fiebre Aftosa**
- **Refuerza un plan de exportaciones que creció un 284% entre 1994 y el 2003**
- **Las exportaciones de carne han aumentado 5,7 veces en los últimos 5 años**
- **Tiene aún un alto potencial como país exportador**

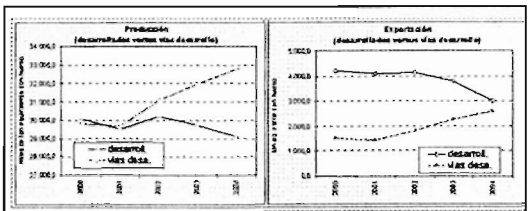
Evolución de la exportación de carne bovina brasileña. (Miles ton)



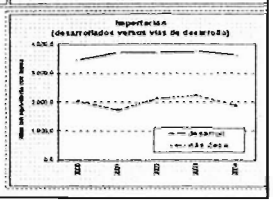
	1995	2000	2001	2002	2003
Brasil	228	592	858	979	1.277
Australia	1.109	1.338	1.398	1.365	1.261
Estados Unidos	826	1.119	1.029	1.110	1.144
Otros Países	3.290	2.869	2.529	2.929	2.747

Principales destinos de la carne brasileña

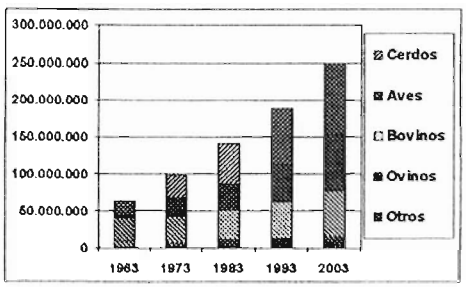




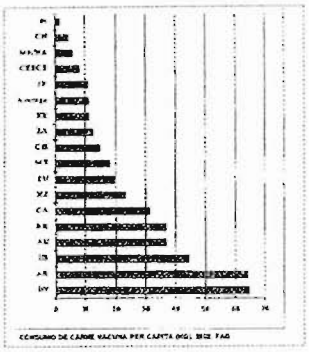
Las tendencias del mercado



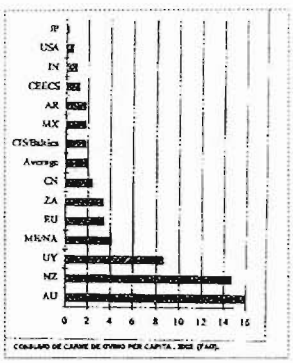
Producción Mundial de Carne (FAO) Toneladas

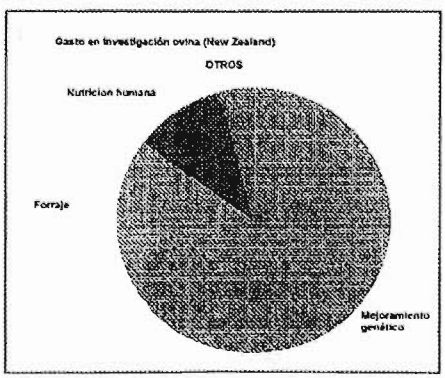


El consumo de carne de vacuno en el mundo

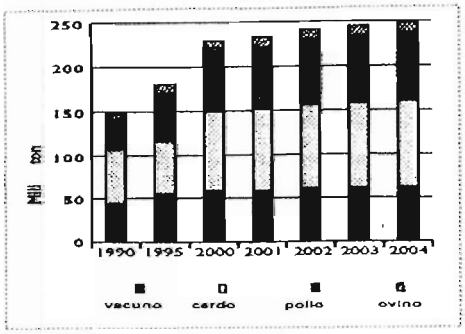


Consumo de ovinos en el mundo

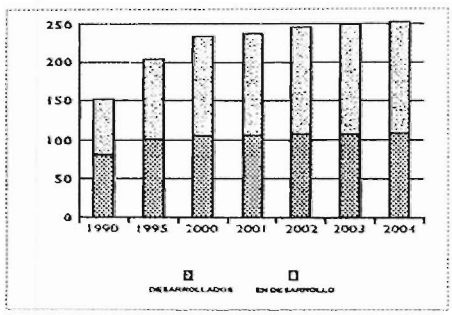




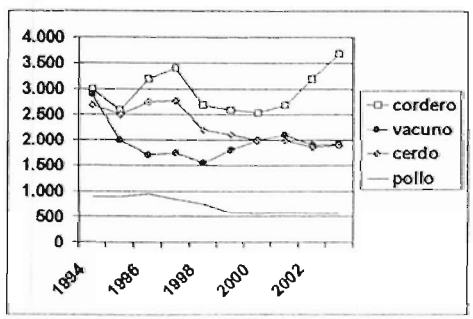
La oferta de carne se satisface por rápido crecimiento del pollo y cerdo



La contribución de los países en desarrollo en el consumo de carne.



Precios Internacionales de la Carne (US$/ton)

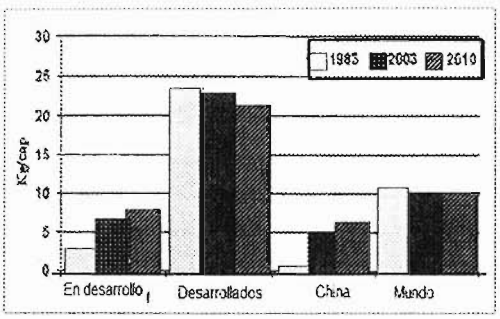


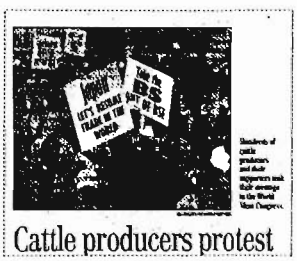
Bovinos: Una mirada al 2004

- La producción de carne vacuna sube marginalmente
- Hay una caída en el consumo per cápita (2%)
- Se reduce la oferta exportable (menos carne a venta en el mundo)
- Aumento en los precios internacionales de la carne vacuna
- Las exportaciones caen en un 8%

Fuente: FAO

¿Quién consumirá carne vacuna?





Productores canadienses en las afueras del recinto del Congreso Mundial protestando por el cierre de sus exportaciones de carne (vara y animales vivos)

El panorama ovino en 2 potencias

AUSTRALIA:

- La menor masa ovina desde 1946
- Sequía en varias zonas
- Cambio hacia la producción de corderos
- Se espera que el consumo doméstico aumente un 35% (2007)
- La exportación de corderos crecerá un 57% al 2007

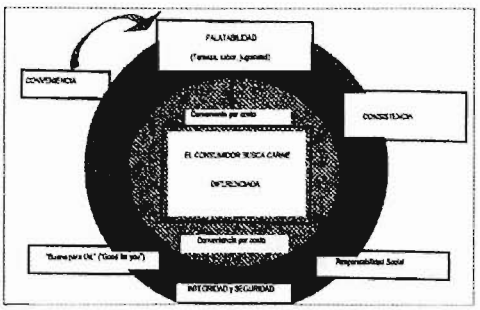
NUEVA ZELANDA:

- La menor masa ovina en 48 años
- La faena de corderos cayó un 8% (2003/04)
- Se espera un leve aumento en la masa reproductora
- Leve aumento en la producción

En resumen los ovinos....

- La carne ovina sigue siendo un producto tradicional
- El cordero se ha reposicionado
- La producción mundial está estable, pero hay una demanda creciente
- Satisfacer las preferencias del consumidor es la clave
- Los consumidores están demandando más.
- Atención a toda la cadena es esencial
- La integridad es vital en todo momento (trazabilidad)
- Debe moverse crecientemente desde una materia prima a productos con mayor valor agregado.

La nueva demanda por carne



Los Desafíos del Sector Carne

- Preocupación por las enfermedades y seguridad alimentaria
- Subsidios y Barreras
- Alertas sanitarios (hormonas, OGM's, Carne Halal)
- Calidad y seguridad del producto son claves para el éxito
- Número creciente de exportadores
- Competencia global del cerdo y pollo
- Trazabilidad y marcas
- Preocupación social: Medio ambiente y Bienestar animal
- Tasas de intercambio
- Desarrollo en la liberalización del comercio

Fuente: FAO

Manejo en el feedlot

- Compra de animales de unos 200 a 215 kilos (Angus negro y rojo, Simental, Charolais, Hereford, Belgian Blue)
- Mantienen los animales entre 150 y 210 días
- Los sacan gordos con 550 a 600 kilos de peso
- Algunos corrales pueden tener una superficie de 5.600 m2 (80x70 m), con una población de 215 novillos por corral
- Sus estructuras de corrales son muy simples.
- Sin embargo cuidan especialmente el efecto del viento
- 2 personas por 1.800 animales

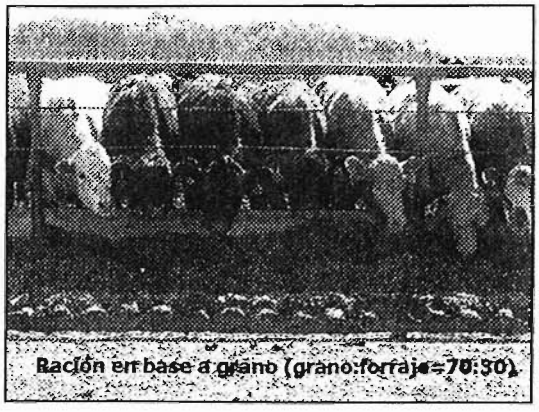
EL CLIMA

- En invierno el animal consume 10% más de alimento y gana en peso 10% menos que en verano
- Temperaturas medias del invierno entre -10°C y -30°C (con extremas de -47°C)
- Corrales sólo con protección para el viento
- En primavera-verano el problema es el barro
- Pérdidas por muerte en invierno normales para Canadá del orden de 3,0%

MANEJO GENERAL DE LA ALIMENTACION

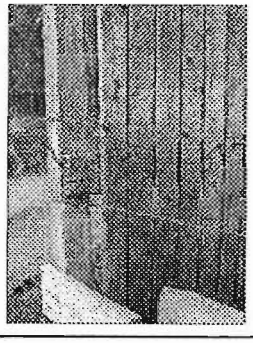
- El 70% de la MS de la dieta es grano
- 30% restante es silo de maíz, o de cebada, más sales minerales
- Para un feedlot (9.000 cabezas en régimen) el predio preparaba unas 400 ha de maíz para silo
- La ración se entrega 2 veces por día
- Ganancia diaria de peso en terneros 1,36 kg/día. En novillos 1,82 kg/día.
- Manejan una ración inicial, una intermedia y una de término (más larga que las anteriores)
- A nivel de los 400 kilos se hace una "limpieza" de los animales que no engordarán lo previsto

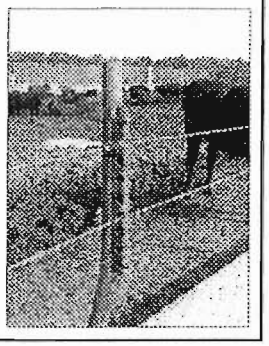
Estructura de feedlots en Canadá



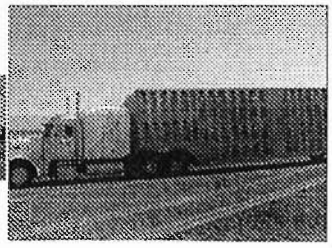
Ración en base a grano (grano:forraje=70:30)

Estructuras relativamente simples





Camión de ganado: 2 pisos y capacidad para 50 animales terminados



EFECTO DEL INVIERNO

Comentarios finales

- El negocio de engorda se ve incierto a causa de la suspensión de ventas a USA, por la BSE
- El precio actual del ternero destetado y la venta del gordo no les permite mantenerse en el negocio
- Aún la gente no quiebra, pero si se mantiene esta situación se producirán los primeras quiebras (los Bancos están prestando contra hipotecas)
- Aún cuando en Canadá bajó el precio y subió el consumo, los productores estiman que esto no alcanza para salvar el negocio.

Agradecimientos

Fondo de Innovación Agraria (FIA) que contribuyó con financiamiento para asistir al Congreso Mundial de la Carne 2004.

Instituto de Investigaciones Agropecuarias (INIA)
Centro Regional de Investigación Carillanca

GIRA Market research; Rabobank International; Feedlot Pederco Inc.; Hamiota Feedlot Ltd.; Shanon Dale Farm Ltd.; IMS e Información entregada en el WMC-Canadá 2004.

Congreso Mundial de la Carne

Síntesis de las principales ideas

C. Köbrich

30 - julio - 2004

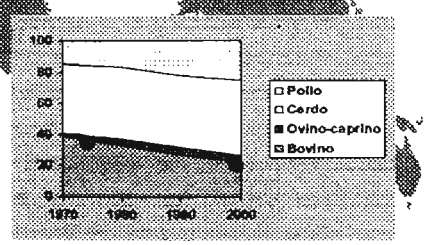
¿Por dónde empezar?

En términos generales, el comportamiento del consumidor de los alimentos es bastante predecible:

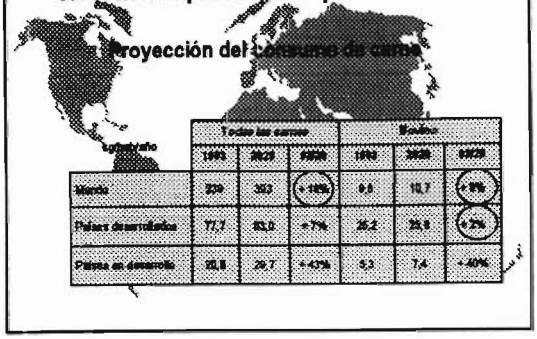
- La demanda sigue patrones fuertemente condicionados son el cambio en el ingreso y el crecimiento de los países
- La oferta no tiene cambios estructurales violentos (particularmente en la carne bovina) y el desarrollo tecnológico es más lento que en otros sectores

Un contexto preocupante para el consumo

Evolución de la estructura del consumo en la UE



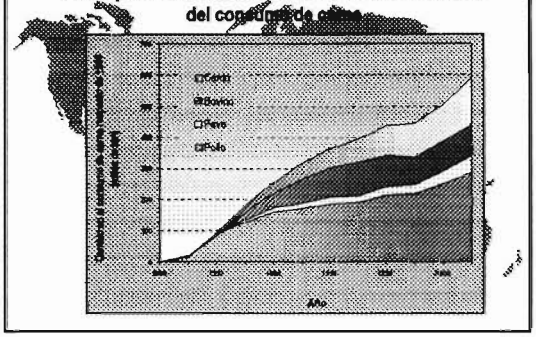
Un contexto preocupante para el consumo



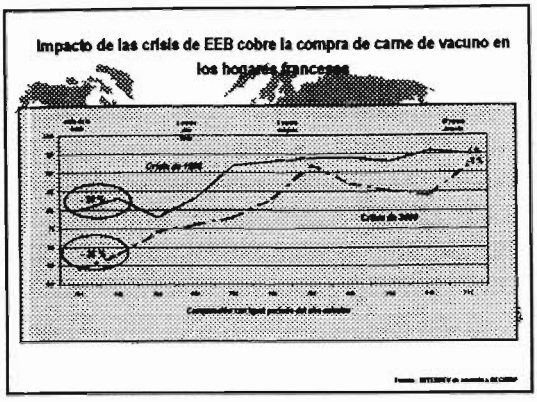
Proyección del consumo de carne

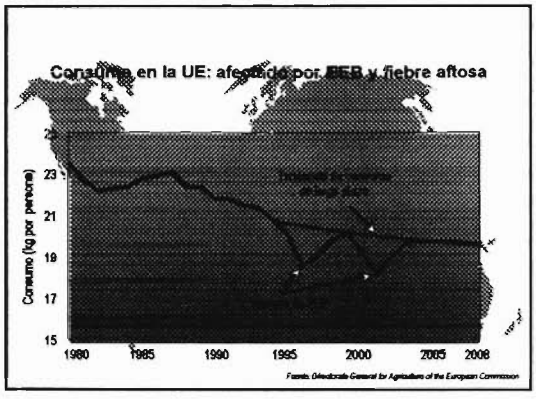
Horizonte	Todas las carnes			Bovino		
	1993	2020	Aumento	1993	2020	Aumento
Mundo	229	352	+54%	6.6	10.7	+9%
Países desarrollados	77.7	83.0	+7%	26.2	28.8	+2%
Países en desarrollo	35.8	26.7	+43%	5.3	7.4	+40%

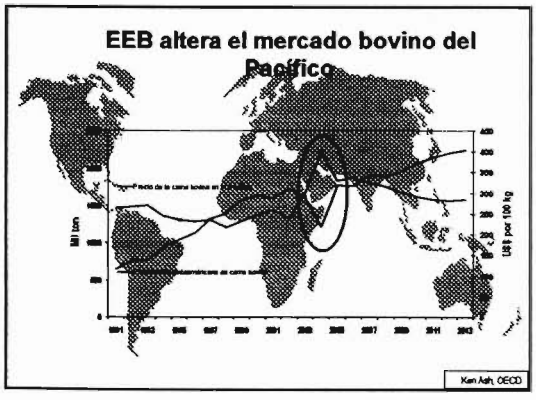
Participación de las diferentes carnes en el aumento del consumo de carne

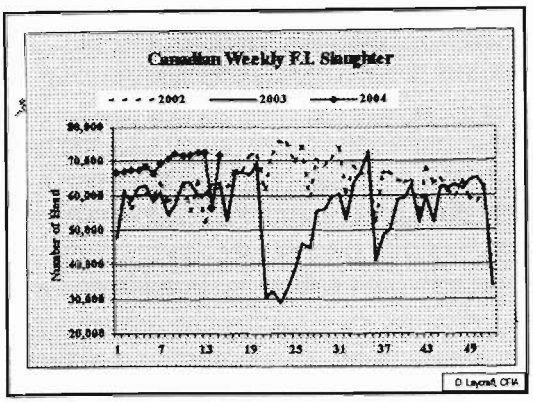


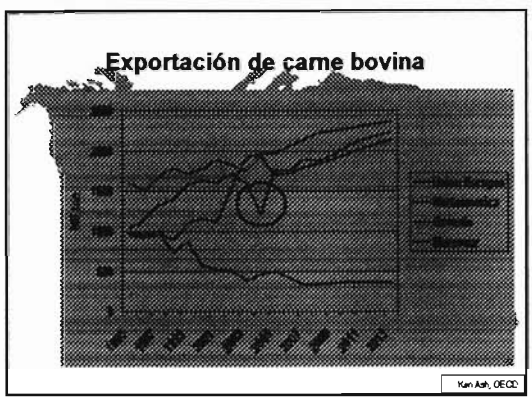
Además, ... siempre aparecen algunos **problemitas**

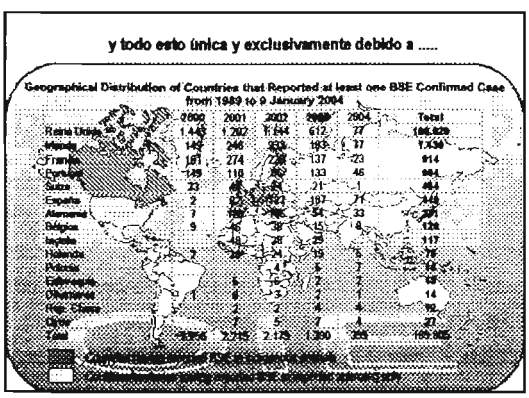

Impacto de las crisis de EEB sobre la compra de carne de vacuno en los hogares franceses


Consumo en la UE: afectado por EEB y fiebre aftosa
Consumo (kg por persona)
23
21
19
17
15
1980
1985
1990
1995
2000
2005
2008

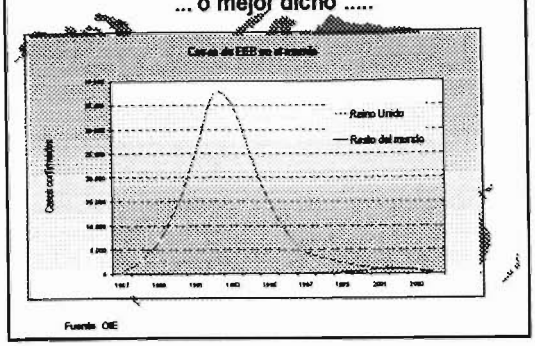

EEB altera el mercado bovino del Pacífico
Mil ton
US$ por 100 kg
Ken Ash, OECD


Canadian Weekly F.I. Slaughter
2002
2003
2004
Number of Head
1
7
13
19
25
31
37
43
49
D Laycraft, CFIA

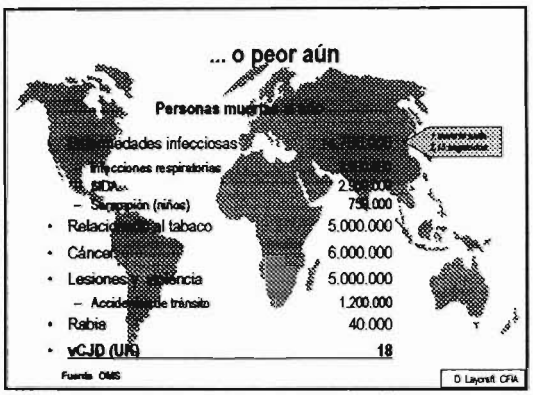

Exportación de carne bovina
Ken Ash, OECD


y todo esto única y exclusivamente debido a .....
Geographical Distribution of Countries that Reported at least one BSE Confirmed Case
from 1989 to 9 January 2004
2000
2001
2002
2003
2004
Total
Reino Unido
1 443
1 202
1 144
612
77
Irlanda
Francia
Portugal
Suiza
España
Alemania
Bélgica
Italia
Holanda
Polonia
Liechtenstein
Dinamarca
Islas Checas
Chile
Total

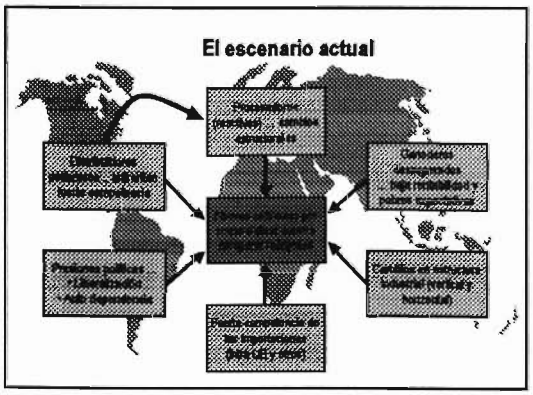
... o mejor dicho .....



... o peor aún



El escenario actual



La conducta del consumidor en los mercados de la carne

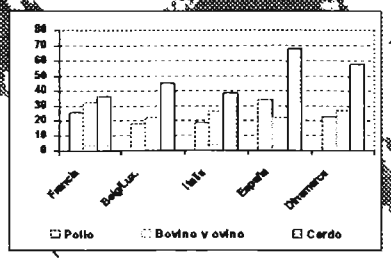
- La contradicción que [illegible] el mercado:
  - como ciudadanos demandamos [illegible], ética, pureza, calidad, [illegible]
  - ... pero como consumidores ... generalmente buscan el menor precio
- Y esto [illegible] a cambiar
- ... lo que genera una fantástica oportunidad de marketing

Entonces, no todos somos iguales

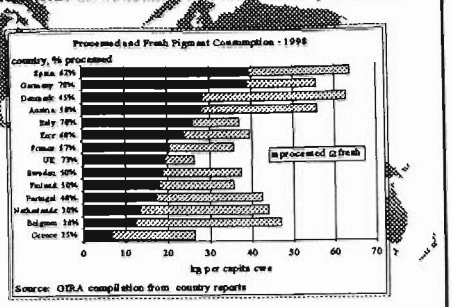
- Claramente hay grandes diferencias en el consumo de carne [illegible] especies, cortes, preparación, [illegible] etc.
- ... incluso al interior de grupos relativamente homogéneos (por ej. escandinavos, ¿latinos?, etc.)

El consumo varía entre países

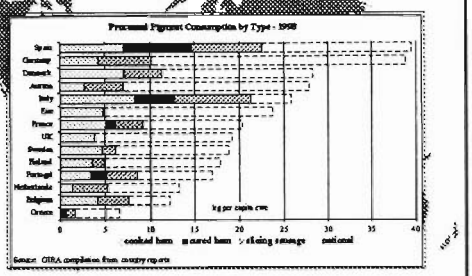
Consumo por persona según [illegible] (kilos, 2002)



Diferencias en consumo de fresco versus procesado



Diferencias en consumo de procesados



También la respuesta a las crisis varía entre países

Europa

- Caída del consumo en el corto plazo
- Disminución estructural de la oferta
- Hoy como importador neto, al recuperarse consumo

Canadá

- Caída del consumo en el muy corto plazo
- Rápidamente apoyo de los canadienses al sector

La respuesta del público canadiense

- [illegible]nza del consumidor [illegible])
  - [illegible] confía en CFIA (Canad[illegible])
  - [illegible]% confía en CCA
  - [illegible]% confía en los produc[illegible]
  - [illegible] cree que carne [illegible] es (encuesta Web)
- Se inicia[illegible]nifestaciones [illegible] a la industria
- Crece e[illegible]ierre de m[illegible]
- Primer pa[illegible]que el consumo crece posterior a la[illegible]ión de un cas[illegible] gracias a un público bien informado
- Punto de inflexión para el mundo

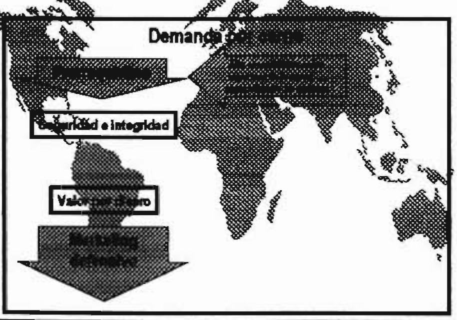
D Leycraft, CFIA

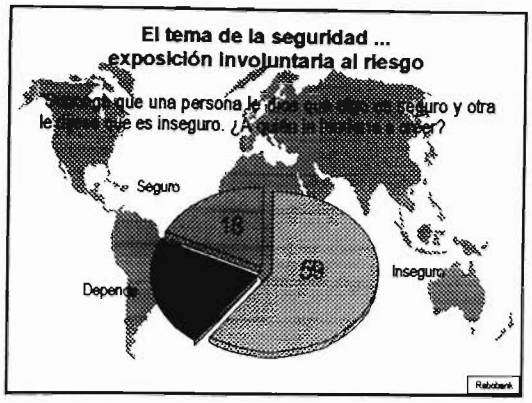
Las razones para esto

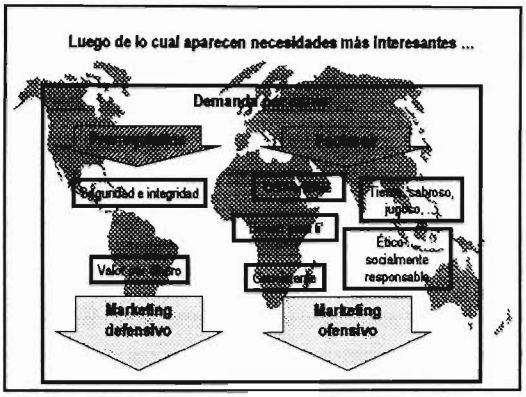
- [illegible]
  - [illegible]sparencia de la inve[illegible]
  - Información científica [illegible] Canadá
  - Relaciones públicas [illegible]bles
- Las medidas proactivas [illegible] desde 1989 dieron sus frutos [illegible]
  - Barre[illegible]
  - Vigila[illegible]
  - Siste[illegible] de identificación nacional

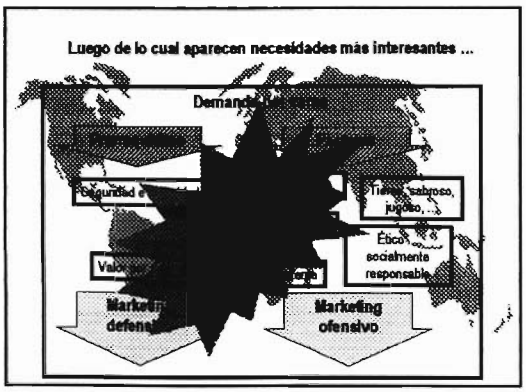
D Leycraft, CFIA

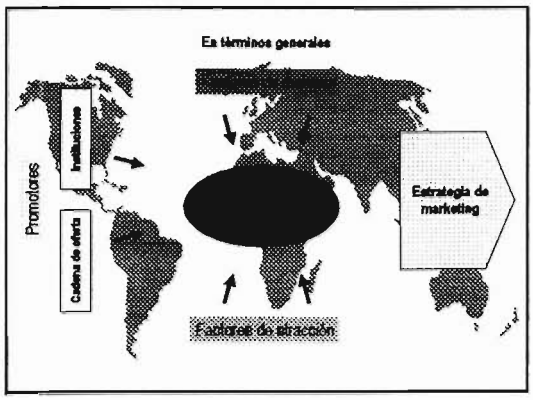
Pero ... se pueden observar tendencias en las determinates de la demanda

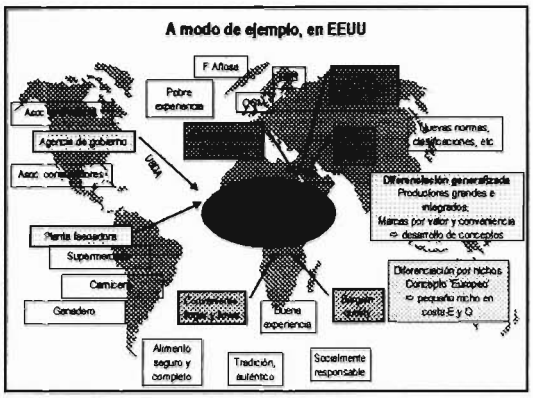


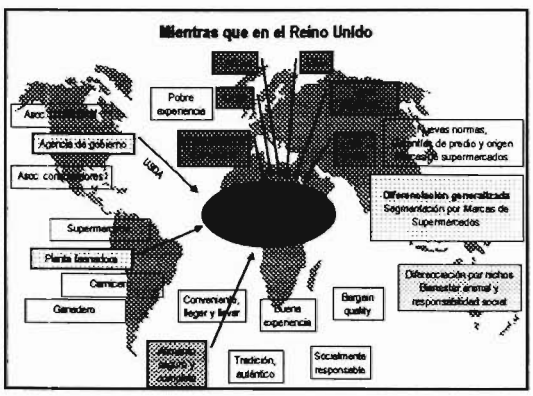

El tema de la seguridad ...
exposición involuntaria al riesgo
Seguro
18
59
Inseguro
Rabobank

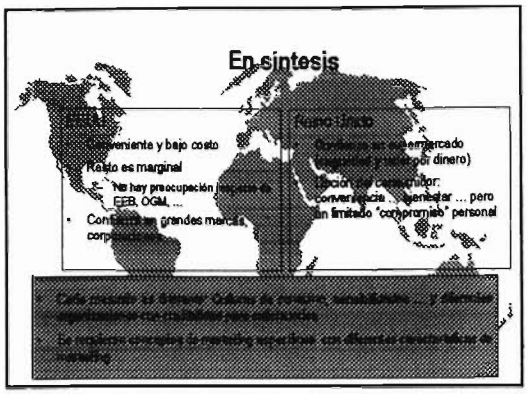

Luego de lo cual aparecen necesidades más interesantes ...
Seguridad e integridad
Ético, socialmente responsable
Marketing defensivo
Marketing ofensivo

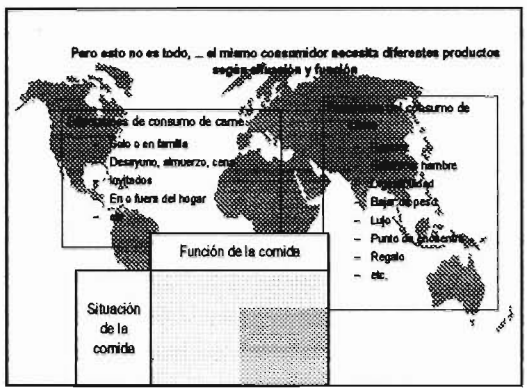

Luego de lo cual aparecen necesidades más interesantes ...
Ético, socialmente responsable
Marketing ofensivo

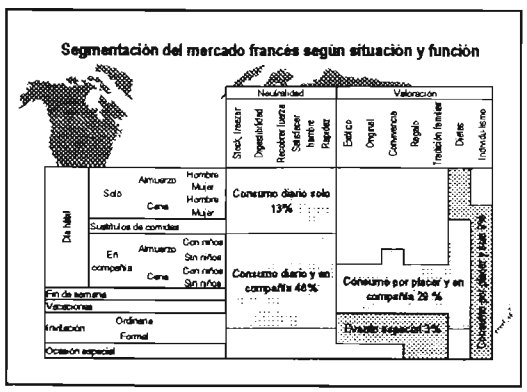

En términos generales
Promotores
Instituciones
Cadena de oferta
Estrategia de marketing
Factores de atracción


A modo de ejemplo, en EEUU
F Aftosa
Pobre experiencia
Asoc.
Agencia de gobierno
Asoc. consumidores?
USDA
Nuevas normas, clasificaciones, etc
Diferenciación generalizada
Productores grandes e integrados;
Marcas por valor y conveniencia
⇨ desarrollo de conceptos
Planta faenadora
Supermercados
Carnicer
Ganadero
Diferenciación por nichos
Concepto 'Europeo'
⇨ pequeño nicho en costa E y O
Conveniencia, llegar y llevar
Buena experiencia
Bargain quality
Alimento seguro y completo
Tradición, auténtico
Socialmente responsable


Mientras que en el Reino Unido
Pobre experiencia
Asoc.
Agencia de gobierno
Asoc. consumidores?
USDA
Nuevas normas,
supermercados
Diferenciación generalizada
Segmentación por Marcas de Supermercados
Supermer
Planta faenadora
Carnicer
Ganadero
Diferenciación por nichos
Bienestar animal y responsabilidad social
Conveniencia, llegar y llevar
Buena experiencia
Bargain quality
Alimento seguro y completo
Tradición, auténtico
Socialmente responsable


En síntesis
Retail
Conveniente y bajo costo
Resto es marginal
No hay preocupación
EEB, OGM, ...
Confianza en grandes marcas
Retail Unico
Conveniencia ... genialidad ... pero
sin límitado "compromiso" personal


Pero esto no es todo, ... el mismo consumidor necesita diferentes productos
según situación y función
Función de la comida
Situación de la comida
Punto de encuentro
Regalo
etc.


Segmentación del mercado francés según situación y función
Neutralidad
Valoración
Día hábil
Solo
Almuerzo
Cena
Hombre
Mujer
Consumo diario solo
13%
Sustitutos de comidas
En compañía
Con niños
Sin niños
Consumo diario y en
compañía 46%
Consumo por placer y en
compañía 29 %
Fin de semana
Vacaciones
Invitación
Ordinaria
Formal
Ocasión especial
Evento especial 3%

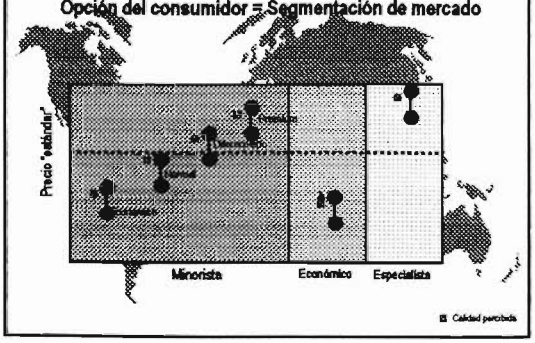
... diferentes necesidades de marketing para los diferentes segmentos de mercado

Tipo	Super-ficie	Idea clave	Producto	Precio	Presentación	Empaque-tado	Comunicación
Solo – neutral	13%	"Recargar", rápido, simple	Individual, práctico, simple	Bajo	Rapidez de compra	Individual, fácil apertura y guardado	Fácil uso, solución simple
Grupo – neutral	45%	"Recargar", no atractivo	Multipack, práctico, simple	Bajo	Según especial uso	Facilitar su uso	Hacer vida fácil, sin riesgo
Solo – placer	9%	Elección individual	Sabor, textura, dieta, ética	Medio – alto	Portazos, placer	Posición individual, placer	Placeres olvidados, satisfacción
Grupo – placer	23%	Exclusivo, punto álcoda bi cocida	Sabor, textura, dieta, ética	Alto	En muchos lugares, combinaciones	Atractivo, ligado a otros productos	Sabor, textura, auténtico, diferente
Ocasión especial	3%	Fiesta, excepcional	Componente social y exclusivo, sabor, etc.	Alto	Especial, festividad, festivo	Ropa, lujoso	Ocasión especial, darse el gusto

... diferentes necesidades de marketing para los diferentes segmentos de mercado

Satisfacer individualmente las necesidades básicas de cada consumidor requiere marketing detallado y no el enfoque tradicional de commodity

Opción del consumidor = Segmentación de mercado



Opción del consumidor = Segmentación de mercado

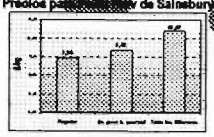
- La segmentación de mercado ratificada claramente por crecimiento en carnes diferenciadas
- La cadena de valor debe proveer una consistente diferenciación innovadora y genuina para capturar y satisfacer estos precios
  - Ello incluye carnes como ingredientes

Reino Unido:

Minoristas exitosos en comunicar esta diferencia

	Tesco	Sainsbury	ASDA
Normal	Tesco	Sainsbury	ASDA
Premium	Finest	Taste the Difference	Extra Special
Económico	Value, Better Value	Economy	Great Price
Saludable	Healthier Eating	Be Good to Yourself	Good For You
Orgánico	Organic	Organic	Organic

Precios para [illegible] de Sainsbury



- Dándole de uso
- Estrategia de marcas (dentro del mercado)
- Especialmente exitosa en productos refrigerados de "conveniencia"

EEUU:

Marcas industriales dirigidas

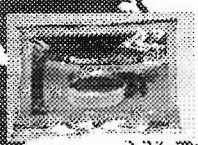
- [illegible] alimentos baratos y convenientes
- [illegible] confía en grandes [illegible]
- El procesador-envasador es el proceso en la cadena
  - Industria altamente concentrada
  - Gran[illegible] economías de escala
    - Producción
    - Marketing
  - Efectiva distribución de marcas (detallistas fragmentados, servicios de alimentación)

Mientras en el resto de Europa

- Los franceses desarrollan nuevos productos e incorporación de signos de calidad (etiquetado)

Calidad e imagen del producto (Francia)

- Desarrollo de signos de calidad: cerca del 15% de la carne de vacuno vendida



En ton peso equivalente	1993	1997	1999	2000	2001
Red Label	14 000	23 000	23 000	25 000	30 700
Agricultura orgánica		Inicio	3 000	4 000	5 200
Certificación de producto	Inicio	137 000	143 000	144 200	147 700

Mientras en el resto de Europa

- Los franceses desarrollan nuevos productos e incorporación de signos de calidad (etiquetado)
- La cadena alemana se une a [illegible] de calidad y servicio
- La estrategia sueca apunta al [illegible] más limpio del mundo
- Y los belgas se centran en razas [illegible]

Grandes esfuerzos de marketing

Motivaciones para innovar

- Adaptar los productos a la demanda, estilo de vida y distribución para mayor difusión del mercado
- Aprovechar mejor todo el canal en términos de calidad y cantidad
- Aumentar el valor agregado y con ello la eficiencia industrial

Posibilidades de innovación

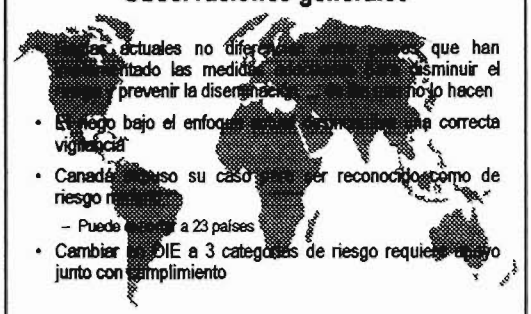
- Cortes y Secos
- Molidos
- Embutidos
- Cocidos
- Delicatessen

Los problemas

- Regulaciones
- Capacidades tecnológicas
- Capacidades comerciales

Perspectivas de políticas

Observaciones generales



- [illegible] actuales no diferencian entre países que han [illegible] las medidas [illegible] disminuir el [illegible] prevenir la diseminación [illegible] no lo hacen
- El riesgo bajo el enfoque [illegible] una correcta vigilancia
- Canadá [illegible] su caso para ser reconocido como de riesgo [illegible]
  - Puede [illegible] a 23 países
- Cambiar de OIE a 3 categorías de riesgo requiere apoyo junto con cumplimiento

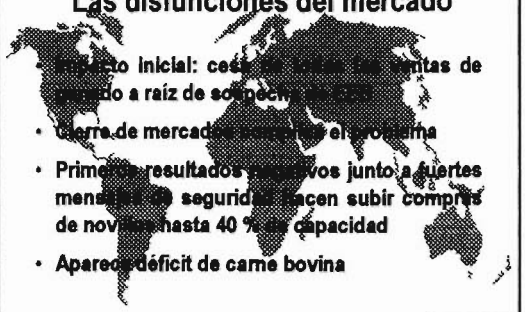
D. Laycraft, CFIA

Observaciones generales

La crisis canadiense fue el resultado del cierre de fronteras y de la disfunción del mercado, pero no de la pérdida de confianza del consumidor

D. Laycraft, CFIA

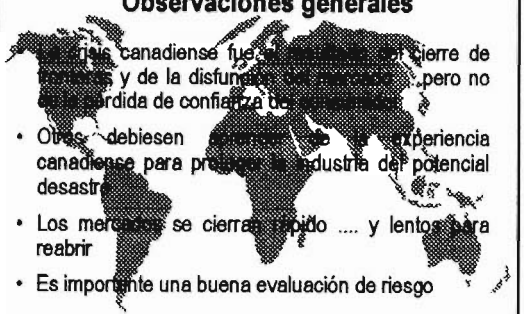
Las disfunciones del mercado



- **Impacto inicial: cese de todas las ventas de ganado a raíz de sospecha de ESB**
- **Cierre de mercados extranjeros en el acto**
- **Primeros resultados negativos junto a fuertes mensajes de seguridad hacen subir compras de novillos hasta 40 % de capacidad**
- **Aparece déficit de carne bovina**

D. Laycraft, CFIA

Observaciones generales



- La crisis canadiense fue el resultado del cierre de fronteras y de la disfunción del mercado ... pero no de la pérdida de confianza de consumidores
- Otros países debiesen aprender de la experiencia canadiense para proteger la industria del potencial desastre
- Los mercados se cierran rápido .... y lentos para reabrir
- Es importante una buena evaluación de riesgo

D. Laycraft, CFIA

REGISTRO DE ACTIVIDADES DE DIFUSION REALIZADAS

REGISTRO DE ASISTENCIA A ACTIVIDAD DE DIFUSION FIA
CONGRESO MUNDIAL DE CARNE (WINNIPEG, 14-17 JUNIO 2004, CANADA)

LUGAR : GTT Quitratue, Sexta Faja IX Reg
FECHA : 29.06.2004

Nombre	RUT	Dirección	Fono/Fax	Institución /predio	RUT organización si corresponde	Cargo	Rubro a que se dedica	e-mail
Adrián Catrileo S.		Casilla 58-D Temuco	45-215706	INIA Carillanca	61.312.000-9	Investigador	Carne bovina	acatrile@carillanca.inia.cl
Benicio Vargas		Correo 3 Gorbea	94532874	—	—		carne	—
Justo toro R.		casilla 940 Gorbea	1974697	—	—		carne	—
Gaspar Moraga		correo Gorbea 1	0358900	-	—		carne	—
Juan Rivas V.		Sexta faja Km 12	—	—	—		carne	—
Apolinario Sandoval M.		Sexta Faja 6 km 5	45286168	—	—		carne	—
Abner Martínez		Correo 2 Gorbea	7187485	—	—		cultivo	—
Roberto Vallette		casilla 1654 Tco	09-7000820	—	—		carne-apícola	—
Jorge Jorquera		correo Gorbea	6341906	—	—		carne	—
Benedicto Guzman		Correo Gorbea	92529124	—	—		carne	—
Claudio Franco		Correo Gorbea 1	43050991	—	—		carne	—

REGISTRO DE ASISTENCIA A ACTIVIDAD DE DIFUSION FIA
CONGRESO MUNDIAL DE CARNE (WINNIPEG, 14-17 JUNIO 2004, CANADA)

LUGAR : GTT Quitratue, Sexta Faja, IX Regi.
FECHA : 29.06.04.

Nombre	RUT	Dirección	Fono/Fax	Institución /predio	RUT organización si corresponde	Cargo	Rubro a que se dedica	e-mail
Adrián Catrileo S.		Casilla 58-D Temuco	45-215706	INIA Carillanca	61.312.000-9	Investigador	Carne bovina	acatrile@carillanca.inia.cl
Misael Roa		Correo Gorbea	96936034	—	—		Carne	—
Pablo Toro		Correo Gorbea	1974697	La Palma	—		Carne	—
Selvin Ferrada		Correo Gorbea	95400254	INIA Carillanca	61.312.000-9		Economista	sferrada@carillanca.inia.cl
Alejandro Iglesias		Instituto OSCI TEMUCO	236064	UNICAL	—	Médico Veterinario	Ganadero	alejandro.iglesias@inacap.cl

4HP
20HA
14T

REGISTRO DE ASISTENCIA A ACTIVIDAD DE DIFUSION FIA
CONGRESO MUNDIAL DE CARNE (WINNIPEG, 14-17 JUNIO 2004, CANADA)

LUGAR : GTT ANREPU (ANGOL)

FECHA : 15-JULIO-2004

Nombre	RUT	Dirección	Fono	Fax	Institución / Predio/ Profo	RUT Organiz.	Cargo y FIRMA	Rubro a que se dedica	E-mail
Adrián Catrileo S.		Casilla 58-D Temuco	45-215706	45-216112	INIA Carillanca	61.312.000-9	Investigador	Carne bovina	acatrile@carillanca.inia.cl
HP Rolando Sepúlveda		M. Bunster 851 ANGOL	45-714121				M. VET	PROYECTOR P. ANIMAL	RSEPULVEDAF@Hotmail.com
HP Pedro Figueroa		LAS MARGARITAS 1465 - ANGOL	45-713986		Veterinaria O'Higgins	5969227-5	Médico Veterinario	Asesoría Prod. Clínica Mayor	[illegible]@entelchile.net
HA FERNANDO TOPALI		FUNDO CHUMPIRRO	712747	712747	AGRICULTOR	6968166-2	DUEÑO	AGRICULTURA GANADERIA FORESTAL	l.topali@yahoo.com.ar
HA [illegible]		Vicuña 699	711283	711283	Agricultor	3540066-4	Propietario	Ganadería	—
HA Gerardo Podlech		Fdo. [illegible]	711660	712751	Agricultor				
HA Jorge Varaud		Fundo el Delirio Rco Angol	711388	711286	Soc. agrícola Varaud Ltda	78201750-0	Propietario	Lechería Engorda frutales	
HA MARCELO CAYUL VILLABLANCA		M. RODRIGUEZ 865. CURACAUTIN	882035	882035	SOC. PULIWEN Ltda	77.795.630-2	Socio ASESOR	GANADERIA	mcayul@araucaniaturismo.cl / marcelocayul@yahoo.es
HA Christian Raimar B.		Los Tulipos 299 Huequén Angol	201567		PRODESAL		Alumno en Práctica CHR Raimar		

REGISTRO DE ASISTENCIA A ACTIVIDAD DE DIFUSION FIA
CONGRESO MUNDIAL DE CARNE (WINNIPEG, 14-17 JUNIO 2004, CANADA)

LUGAR : CTT ANREPU (ANGOL)

FECHA : 15-JULIO-2004

Nombre	RUT	Dirección	Fono	Fax	Institución / Predio/ Profo	RUT Organiz.	Cargo y FIRMA	Rubro a que se dedica	E-mail
F. Cortés B.		Miraflores	98699891		Fundo	=	Propietario	Leche carne Recuadro	
Vinicio Contreras.		Fundo Taulbillo	511465	511465	Fundo Taulbillo		[firma]	Agrícola	
Luis Montero		Ines de Suarez 1/6	98480703	—	—		[firma]	Agrícola	
[illegible]		A. Bullock 128			—		[firma]	CORRETAJE AGRICOLA	
Gonzalo Figueroa		Llaima 598	712335	712335	Vegas Blancas		Presidente	Agrícola	
Juan González R.		Boquedano # 77	714889	-	I. Municipalidad Angol. Prodesal		Técnico Agp.	Agropecuario	jgonzalezroa@yahoo.es
Marcelo Pefaur U.		Alborada 62	201567 713154	—	I. Municipalidad Angol Prodesal	—	Jefe Técnico [firma]	Ing. agrónomo	marcelpefaur@yahoo.es
EDUARDO MOENNE G		Covadonga 0184	712911	—			MED. VETERINARIO [firma]	PROD. LECHE Y CARNE	emoenne@entelchile.net
Carlos Arata		Fundo La Hiedra s/n	045 774015	045 774009	Agrícola La Hiedra Ltda		[firma]	GANADERIA CULTIVOS	lahiedre@entelchile.net

REGISTRO DE ASISTENCIA A ACTIVIDAD DE DIFUSION FIA
CONGRESO MUNDIAL DE CARNE (WINNIPEG, 14-17 JUNIO 2004, CANADA)

LUGAR : GTT ANREPU (ANGOL)

FECHA : 15-JULIO-2004

Nombre	RUT	Dirección	Fono	Fax	Institución / Predio/ Profo	RUT Organiz.	Cargo y FIRMA	Rubro a que se dedica	E-mail
Federico Rioseco G.		J. Sepúlveda 899-Angol	711613	-	GTT ANREPU Hij. 3 San Miguel	-	[firma]	Leche-Carne	Frioseco@terra.cl
Carlos San Martín R.		Amanecer 121 Ptas del Sol Angol	711052	Sorrel...			[firma]	Producción de terneros	csm_@hotmail.com
Jorge Boyer M.		O'Higgins 520	Angol 711805	45 711805	Servicios Veterinarios	[illegible]	[firma]	Servicios	Jorgeboyer@hotmail.com
Claudio Sandoval Poblete		Fdo. San Isidro	712159	712159	GTT ANREPU	-	[firma]	Engordas	csantora@yahoo.com
Alfonso Soto V.		Fdo Itraque	09-4196228 1971136	1971135	GTT ANREPU		[firma]	Lechería	
Gustavo Kausel K		Fdo El Recreo	9-8733143		GTT ANREPU		[firma]	Papas	
Felipe de la Fuente R.		Fdo San Gabriel	9-8882430 45-712109 45-719338(F)	45-719338	GTT Anrepu		[firma]	Cultivos Tradicionales y frutales menores	
Cristian Smithmans		Casilla 26 Renaico	9 5190526	—	—	—	[firma]	Carne Cultivo	[illegible]

REGISTRO DE ASISTENCIA A ACTIVIDAD DE DIFUSION FIA
CONGRESO MUNDIAL DE CARNE (WINNIPEG, 14-17 JUNIO 2004, CANADA)

LUGAR : RADIO AGRICULTURA

FECHA : 13-julio-2004

Nombre	RUT	Dirección	Fono	Fax	Institución / Predio/ Profo	RUT Organiz.	Cargo y Firma	Rubro a que se dedica	E-mail
flor Passalacqua		Bilbao 931	211915	211915	Fucoa.	83.062.200-4	Periodista		fpas@fucoa.gob.cl
									VIERNES 23/7/04 AL AIRE.

REGISTRO DE ASISTENCIA A ACTIVIDAD DE DIFUSION FIA
CONGRESO MUNDIAL DE CARNE (WINNIPEG, 14-17 JUNIO 2004, CANADA)

LUGAR : RADIO AGRICULTURA (TEMUCO)

FECHA : 29 JULIO 2004

Nombre	RUT	Dirección	Fono	Fax	Institución / Predio/ Profo	RUT Organiz.	Cargo y FIRMA	Rubro a que se dedica	E-mail
Flor Passalequa		LYNCH 646	213754	213854	Radio Agricultura	83.062200-4		Periodismo	(MARTES 3/8/04 AL AIRE)

REGISTRO DE ASISTENCIA A ACTIVIDAD DE DIFUSION FIA
CONGRESO MUNDIAL DE CARNE (WINNIPEG, 14-17 JUNIO 2004, CANADA)

LUGAR : INIA REMEHUE (OSORNO)

FECHA : 22 JULIO 2004

	Nombre	RUT	Dirección	Fono	Fax	Institución / Predio/ Profo	RUT Organiz.	Cargo y FIRMA	Rubro a que se dedica	E-mail
	Adrian Catrileo		-O Casilla 58-D	45 215706	45 216112	INIA-Carillanca	61.312000-9		Carne bovina	acatrileo@carillanca.inia
H	Claudio Rojas		Casilla 58-D	45 215706	45 216112	INIA-CARILLANCA	✓		Carne bovina	crojas@carillanca.inia.cl
H	Fernando Fernández		casilla 165 Cauquenes	73-512260	73-512502	INIA-Cauquenes	✓		carne/riego	ffernandez@inia.cl
H	[illegible]		[illegible]	65-630656	65-630656	INIA-CHILOE	✓		Carnes y Forrajes	[illegible]
A	Rodrigo de la Barra		✓ ✓	✓	✓	✓	✓		Vinos.	inia chile@tie.cl
H	Norberto Teuber V.		24-O. Osorno	64-233515	64-237746	INIA-REMEHUE	✓		Praderas	nteuber@remehue.inia.cl
H	Christian Hepp		Casilla 296 Coyhaique	67 233366	67 233270	INIA Tamelaike	✓		Sistemas Pastoriles	chepp@tamelaike.inia.cl
H	VICTOR VALENCIA		CASILLO 34 SAN. SARIEZ	73-381768	73-381769	INIA RAYHUEN	✓		CARNE BOVINA	VVALENCIA@INIA.CL
H	SERGIO IRARRA		Casilla 24-O Osorno.	64 233515	64 237746	INIA REMEHUE	✓		CARNE BOVINA	SIRARRA@REMEHUE.INIA

REGISTRO DE ASISTENCIA A ACTIVIDAD DE DIFUSION FIA
CONGRESO MUNDIAL DE CARNE (WINNIPEG, 14-17 JUNIO 2004, CANADA)

LUGAR : INIA REMEHUE (OSORNO)

FECHA : 22 JULIO 2004

Nombre	RUT	Dirección	Fono	Fax	Institución / Predio/ Profo	RUT Organiz.	Cargo y FIRMA	Rubro a que se dedica	E-mail
Hernán Acuña		Los Maitenes 585 V. El Bosque Chillán	(42)209510	(42)209599	INIA	61312000-9	Director Regional	Praderas	hacuna@quilamapu.inia.cl
Francisco Salas		Augustos 1056 Puerto Montt	(65)241048	(65)241048	CRIA	"	Mgr. Vegetales	Prod. Ovina	fsalas@tempemike.inia.cl
Oscar Vidal		Casa 30 Hacienda La Marquesa La Arauco	43 313688	43-313688	INIA	"	Coordinador C.E. Kampenaike	Prod. Leche	ovidal@inia.cl
Patricio Soto		Sto Cambio 573 V. El Bosque Chillán	42-209659	42-209599	INIA	"	Ing Agr.	Investigación Praderas	psoto@quilamapu.inia.cl
Julio Arendaño		Casilla 105 Cañquenes	73 512260	73 512502	Inia-CE Cañquenes	61312000-9	Ing Agr.	Ovinos y Praderas Secano	jarendano@inia.cl
Ernesto Fahrn		Casilla 426 Chillán	42-209657	42-209599	INIA	"		Leche	ESAHNA@quilamapu.inia.cl
SERGIO HAZARD		CASILLA 58D TEMUCO	45 246706	45-246112	INIA		ING AGRONOMO	LECHE	SHAZARD@CARILLANCA.INIA.CL
Pedro Hevia		CASILLA 439. CORREO 3	2252118		INIA	"	PROFESIONAL NACIONAL	FRUTALES	phevia@INIA.CL
J. C. DUMONT		Casilla 24-D Osorno	233515	237746	INIA	"	Encargado Centro Lechero	Leche	JDUMONT@REMEHUE-INIA.CL

REGISTRO DE ASISTENCIA A ACTIVIDAD DE DIFUSION FIA
CONGRESO MUNDIAL DE CARNE (WINNIPEG, 14-17 JUNIO 2004, CANADA)

LUGAR : INIA - REMEHUE (OSORNO)

FECHA : 22 - JULIO - 2004

Nombre	RUT	Dirección	Fono	Fax	Institución / Predio/ Profo	RUT Organiz.	Cargo y FIRMA	Rubro a que se dedica	E-mail
RODOLFO SALDAÑA		CASILLA 24-O OSORNO	64-233515	64-237746	INIA REMEHUE	61.312.000-9		LAB. NUTRICION ANIMAL	RSALDANA@REMEHUE.INIA.CL
OSVALDO TEUBER W.		LAS LENGAS 1450 COYHAIQUE	67-233270	67-233270	INIA TAMELAIKE	61.312.000-9		FORRAJERAS	OTEUBER@TAMELAIKE.INIA.CL
CARLOS OVALLE M.		Casilla 426 Chillán	42-209688	42-209599	INIA Quilamapu	"		PRADERAS	covalle@quilamapu.inia.cl
Carolina Folch		Casilla 24-O OSORNO	64-233515	64-237746	INIA Remehue	61.312.000-9		Biotecnología Animal	Biotec@Remehue.INIA.cl
Pascal Gallardo M.		Las Lengas 1450 Coyhaique	67-233270	067 233270	INIA TamelAike	61 312.000-9		Ovinos	pgallard@tamelaike.inia.cl
Héctor Velleher		Casilla 3 Litueche	72-822125	72-822125	INIA-HUASANTO	61312000-9		OVINOS BOVINOS	hvelleher@rayentue.inia.cl
Julián Perga		Casilla 24-O (OSORNO)	64-237746 64-233515	64-237746	INIA-REMEHUE	"		BOVINOS DE LECHE	jparga@remehue.inia.c
Camila Muñoz		Casilla 3 Litueche	72-822125	72-822125	INIA-RAYENTUE	"	INVESTIGADOR	OVINOS	cmunoz@rayentue.inia.cl
PEDRO COFRÉ		CASILLA 426 CHILLÁN	42 — 209653	42 — 209599	INIA QUILAMAPU	"		CONSERV. FORRAJES	pcofre@quilamapu.inia.cl

REGISTRO DE ASISTENCIA A ACTIVIDAD DE DIFUSION FIA
CONGRESO MUNDIAL DE CARNE (WINNIPEG, 14-17 JUNIO 2004, CANADA)

LUGAR : INIA Remehue (Osorno)

FECHA : 22 Julio 2004

Nombre	RUT	Dirección	Fono	Fax	Institución / Predio/ Profo	RUT Organiz.	Cargo y FIRMA	Rubro a que se dedica	E-mail
Jorge A. González V.		Casilla 426 Chillán	42-209601	42-209599	INIA Quilamapu	"	[firma]	Economía Agraria	jgonzalez@quilamapu.inia.cl
Raul Lira F.		Angamos 1056 P. Arenas	61-241048	241048	INIA - Kampenaike	"	Investigador [firma]	Ovinos	rlira@kampenaike.inia.cl
Claudio Benjamin		Casilla 24-0 Osorno	64-233515	64-237746	Inia Remehue	"	Investigadora [firma]	Papas	cbenjamin@remehue.inia.cl
Héctor Uribe		Casilla 24-0	64-233515	64-237746	INIA	"	Investigador [firma]	Genética	HURIBE@UACH.CL
Daniel Claro		E. Fernández 854 8760	2392992		Fundo Las Majadas	41298130-3	Productos [firma]	Bovinos carne Ovinos carne	
Alfredo Torres		Casilla 24-0 Osorno	64-233515	64-237746	INIA Remehue	61.312.000-9	Investigador Praderas	Praderas	atorres@remehue.inia.cl
Marta Alfaro		Casilla 24-0 Osorno	64-233515	64-237746	INIA Remehue	61.312.000-9	Investigadora [firma]	Fertilidad suelo y contaminación ambiental	malfaro@remehue.inia.cl
Fernando Squella		Casilla 3, Litueche	72-822125	72-822125	INIA RAYENTUE	"	Investigador [firma]	Ovinos - Praderas	fsquella@rayentue.inia.cl
Marcelo Zolezzi		Av. Salamanca s/n - Los Choapinos	522220	522220	INIA	61.312.000-9	[firma] Director	Cultivos	mzolezzi@rayentue.inia.cl

REGISTRO DE ASISTENCIA A ACTIVIDAD DE DIFUSION FIA
CONGRESO MUNDIAL DE CARNE (WINNIPEG, 14-17 JUNIO 2004, CANADA)

LUGAR : INIA REMEHUE (OSORNO)

FECHA : 22 JULIO 2004

Nombre	RUT	Dirección	Fono	Fax	Institución / Predio/ Profo	RUT Organiz.	Cargo y FIRMA	Rubro a que se dedica	E-mail
Juan Lopez		Alsacia 1252 Osorno	233515	237746	Inia Remehue	4	Periodista	Comunicaciones	lopezj@remehue.inia.cl
Julio C. Balazic		8 Km 8 Norte L. Sur Casilla 24-0 Osorno	64-233515	64-237746	INIA-Remehue	61.312.000-9	Director Regional	Investigacion	jbalazic@remehue.inia.cl
Lubo Goic		Esmeralda 1656 Osorno.	232081	—	INIA Remehue	4	Investigador Remehue	Carne	lgoic@remehue.inia.cl
FRANCISCO SANHUEZA		CASILLA 24-0, OSORNO	233515	237746	INIA REMEHUE	61.312.000-9	SUBDIRECTOR I+D	GANADERIA Y MEDIO AMBIENTE	FSANHUEZA@REMEHUE.INIA.CL
ORIELLA ROMERO		INIA CARILLANCA	215706	216112	CARILLANCA INIA	"	INVESTIGADOR PRADERAS	PRADERAS	oromero@carillanca.inia.cl

REGISTRO DE ASISTENCIA A ACTIVIDAD DE DIFUSION FIA
CONGRESO MUNDIAL DE CARNE (WINNIPEG, 14-17 JUNIO 2004, CANADA)

LUGAR : GTT Collipulli (Pidima)

FECHA : 28-JULIO-2004

Nombre	RUT	Dirección	Fono	Fax	Institución / Predio/ Profo	RUT Organiz.	Cargo y FIRMA	Rubro a que se dedica	E-mail
Ricardo Campi		casilla 58-D Temuco	(45) 215706	(45) 216112	INIA	61312000-9		fertilidad suelos	rcampillo@cerillanca.inia.cl.
Manuel Escalon		Parcela 3A Chiguayante	09)6437431	045) 811391	Parcela 3A	—		GANADERIA	—
Silvia Becoiza		Hijuela Sta ELENA	93374495	—	Hijuela Sta Elena	—		ganadería	—
Ismael Rodrigu		Freire 1335 Collipulli	812816	—	Parcela 18	—		vacunos	—
Gavino García		P. 23 El Progreso	812816	—	Parcela 23	—		Ganadería	—
Jose Salvo		Traquiñanco	812816	—	Parcela 19	—		✓	—
Manuel Cabrera		Salto Chancahua	812816	—	Parcela 12	—		"	—
Luis Reyes		Pasaje #7 S. CHANCAHUA	(09) 6427853	812816	Parcela 7	—		CEREALES GANADERIA	—
Aurelio Damien		286-6	812816	—	Parcela 18	—		"	—

REGISTRO DE ASISTENCIA A ACTIVIDAD DE DIFUSION FIA
CONGRESO MUNDIAL DE CARNE (WINNIPEG, 14-17 JUNIO 2004, CANADA)

LUGAR : GTT Collipulli (PIDIMA)

FECHA : 28-Julio-2004.

Nombre	RUT	Dirección	Fono	Fax	Institución / Predio/ Profo	RUT Organiz.	Cargo y FIRMA	Rubro a que se dedica	E-mail
Samuel Salvo		Tranquilvanco	97826308		Parcela 10B	—		VACUNOS	—
Claudio Pe(A)		Casilla 58-D Tco	215706	216112	INIA	—		Carne	Cpoja@carillanca.inia.cl

REGISTRO DE ASISTENCIA A ACTIVIDAD DE DIFUSION FIA
CONGRESO MUNDIAL DE CARNE (WINNIPEG, 14-17 JUNIO 2004, CANADA)

LUGAR : Parque Exposiciones C. Caminondo (SOFO), Temuco

FECHA : 30 JULIO 2004

Nombre	RUT	Dirección	Fono	Fax	Institución / Predio/ Profo	RUT Organiz.	Cargo y FIRMA	Rubro a que se dedica	E-mail
Adrian Catrileo		Casilla 58-D Tco	215706	216112	INIA	61312000-9	[firma]	bovinos de carne	acatrile@carillanca.inia.cl
Fernando Hermanns		Andrés Bello 840 Dept 32 Tco	215119	-	-	-	[firma]	Médico Veterinario	fhermanns@latinmail.com
FERNANDO RODRIGUEZ		PABLO NERUDA 0619	386298	386298	FRONTAGEN	78422360-4	[firma]	MEJORA GENETICA	FRONTAGEN@TIE.CL
Patricio A. Paredes A.		Fuller 2260	280579	-	C.Q.C.	-	Consultor	Certificación prod. export.	pparedes@123mail.cl
Vicente Schmettler R.		Recreo 570 Dept 301	743281	-	-	-	Propietario [firma]	Ganadería	—
ALEJANDRO SCHÜLER		BALMACEDA 8010 VALDIVIA	214665	—	FRIVAL	96.029.008-3	A. comercial [firma]		ASCHÜLER@FRIVAL.CL
Hernán Montenegro		Manuel Recabarren 03891 Tco	251142	251142	Red Semi-ganaderos SOFO	-	[firma]	Ganadería y Cultivos	—
CAROLINA QUIJADA		SEPTIMIO VALLEJOS 340 - LAUTARO	532435	—	MUNICIPALIDAD DE LAUTARO	—	MEDICO VETERINARIO	GANADERIA MAYOR - MENOR.	gcquijado@hotmail.com
Andreas Kobrich		San Martín 828 Temuco	403100	403103	SOFO	81.389.900-0	Ing. Agr.	Ganadería y Cultivos	akobrich@sofo.cl

REGISTRO DE ASISTENCIA A ACTIVIDAD DE DIFUSION FIA
CONGRESO MUNDIAL DE CARNE (WINNIPEG, 14-17 JUNIO 2004, CANADA)

LUGAR : Parque Exposiciones C. caminando (Sofo), Temuco

FECHA : 30 JULIO 2004.

Nombre	RUT	Dirección	Fono	Fax	Institución / Predio/ Profo	RUT Organiz.	Cargo y FIRMA	Rubro a que se dedica	E-mail
Nelson Oellerich R.		37 Prat 780	407781	407781	Agricultor	7.987.700-K		Ganadería Cultivos	
DAVID ACUÑA IBAÑEZ		PEHUENCHES 480 CHILLÁN	42-213472	—	APROCARNE ÑUBLE A. G.	65.250.860-K	DIRECTOR	ASESOR EN GANADERÍA	DAVID.ACUÑA@CHILE.COM
Alex. Ana		Hacendel 0648 Tco	313423	313423	SIAC. 2DA	77.533.300-1	Representante Legal	Consultores.	sigetda@entelchile.net
Camilo Bonnefoy V.		Fdo. Sta Catalina	381007	381007	Agr. Industrial Lo Valledor	92.186.000-6	Representante Legal	Ganadería	C. BONNEFOY @123MAIL.CL
Hugo Nizama		Cerrillos 145 Lautaro	1974067		Independiente	—		Crianza	—
Nelda Lizama		Jav. Carrera 2053 Tco	737456	737456	Agricultor Ganadero			Crianza	nelidalizama@terra.cl
Roberto Aniagada		6 El Llano 02631	2488444	-	Profo OVINO	—		OVINOS	alonsobasilio@hotmail.com
Jaime Santander		Los Jardines 0352	237065	403103	Sofo	21.387.280-0		Transferencia Tecnológica	jsantander@sofo.cl
CLAUS Kobrich		Rdo. Ohiggins 282/Stgo	02-6883303	026785611	U de Chile	69.100.000-1		Académico	ckobrich@uchile.cl

REGISTRO DE ASISTENCIA A ACTIVIDAD DE DIFUSION FIA
CONGRESO MUNDIAL DE CARNE (WINNIPEG, 14-17 JUNIO 2004, CANADA)

LUGAR : Parque Exposiciones, C. Comunitario (SOFO) Temuco

FECHA : 30 julio 2004.

Nombre	RUT	Dirección	Fono	Fax	Institución / Predio/ Profo	RUT Organiz.	Cargo y FIRMA	Rubro a que se dedica	E-mail
Oriella Romero		Carrillo 58-1) TRO	215706 (286)	216112	INIA	61312000-9		Profesional	oromero@carillanca.inia.cl
Claudio Rojas		Carrillo 58-1)	215706 (283)	216112	INIA	61312000-9		Bovinos de Carne	crojas@carillanca.inia.cl

NOMINA DE INVITADOS A CHARLA DE DIFUSIÓN CON MOTIVO DE ASISTENCIA A "CONGRESO MUNDIAL DE LA CARNE" (REALIZADO EN WINNIPEG-CANADA, ENTRE EL 14 Y 17 DE JUNIO DE 2004). ACTIVIDAD A REALIZARSE EL DÍA 30 DE JULIO DE 2004, A PARTIR DE LAS 15,00 HRS., EN EL RECINTO SOFO DE TEMUCO

Nº	NOMBRE	PREDIO/EMPRESA	ACTIVIDAD/PROFO	DIRECCIÓN POSTAL	TELEFONO	CIUDAD	Conf
1.	Alberto Alcoholado Castillo	Soc. Agrícola Piedras Negras Fundo El Rosario	Profo Red Sur	Casilla 319		Los Laureles	
2.	Alejandro Schuler	FRIVAL Valdivia		Balmaceda 8010	217423	Valdivia	SI
3.	Alejandro Seco G.		Profo Ovino	Casilla 27		Freire	
4.	Alex Jara Carrasco		Consultor	Hoendel 0645, Los Creadores	313423	Temuco	SI
5.	Alex Weber Orellana		Profo GBC		09-8838800		
6.	André Dumont						SI
7.	Andreas Köbrich G.	SOFO A.G.	Ing. Agrónomo	San Martín 838	403100	Temuco	SI
8.	Andrés N.Reichert Meiners	Fundo Santa Elena	Profo Red Sur	Casilla 50	391068 09-4431539	Freire	NO
9.	Ariel Apaoblaza Puchi		Profo Raza Clavel	Claro Solar Nº 780 Of.603	45-235398	Temuco	
10.	Arturo Gardeweg		Profo Raza Clavel	Claro Solar Nº 780 Of.603	45-235398	Temuco	
11.	Carolina Quijada Alarcón		Médico Veterinario	Septimio Vallejos 340	201459	Lautaro	SI
12.	Christian Bolomey	Jefe Planta	Frigorífico Temuco	Avda. Altamira 01825	644108	Temuco	NO
13.	Claudio Rojas G.	INIA Carillanca	Ingeniero Agrónomo	Casilla 58-D	215706	Temuco	SI
14.	Cristian Smitmans Lavandero	Fundo Santa Ana	Profo Red Sur	Casilla 26		Renaico	
15.	Eduardo M. Sabugo Telechea		Profo Red Sur	Av. Alemania 0650		Temuco	

NOMINA DE INVITADOS A CHARLA DE DIFUSIÓN CON MOTIVO DE ASISTENCIA A "CONGRESO MUNDIAL DE LA CARNE" (REALIZADO EN WINNIPEG-CANADA, ENTRE EL 14 Y 17 DE JUNIO DE 2004).
ACTIVIDAD A REALIZARSE EL DÍA 30 DE JULIO DE 2004,
A PARTIR DE LAS 15,00 HRS., EN EL RECINTO SOFO DE TEMUCO

Nº	NOMBRE	PREDIO/EMPRESA	ACTIVIDAD/PROFO	DIRECCIÓN POSTAL	TELEFONO	CIUDAD	Conf
16.	Enrique A. Sabugo Canseco	Fundo Santa Ana	Profo Red Sur	Casilla 932	233928 09-9200256	Gorbea	NO
17.	Erik Lovengreen		Profo Ovino	Casilla 57		Pitrufquén	
18.	Fernando Hermanns		Profo Ovino	Andrés Bello 810.Dpto. 32		Temuco	SI
19.	Gastón Caminondo Vidal	Soc. Agríc. y Ganad. Parlamento Ltda.	Profo Red Sur	Arturo Prat 109 Of.2	09-8472080	Temuco	NO
20.	Gastón Soto Crisosto		Profo GBC				
21.	Germán Affeld Aeschlimann		Profo GBC				
22.	Guillermo Rioja López	FIA	Ingeniero Agrónomo	Avda. Santa María 2120 Providencia		Santiago	SI
23.	Gustavo Hott Marquard		Profo Red Sur	Andrés Bello 765, piso 2 Of. 21		Temuco	
24.	Hernán Morales Lagos		Profo GBC				
25.	Hernán René Montenegro Pereira		Profo Red Sur	Av. M. Recabarren 03891	252142 09-8471472	Temuco	SI
26.	Hilda Fernández Fernández	Fundo Las Gredas	Profo Raza Clavel	Casilla #7	09-84744485	Lautaro	
27.	Hugo Lizama Arias	Fundo Santa Margarita	Profo Red Sur	Casilla 145		Lautaro	SI
28.	Jaime Santander E.	SOFO A.G.	Ingeniero Agrónomo	San Martín 838		Temuco	SI
29.	Jean Pierre Bertholet		Profo Ovino	A. Varas 432		Temuco	
30.	John Raby B.	Gerente General	Frigorífico Temuco	Avda. Altamira 01825	644108	Temuco	NO

NOMINA DE INVITADOS A CHARLA DE DIFUSIÓN CON MOTIVO DE ASISTENCIA A "CONGRESO MUNDIAL DE LA CARNE" (REALIZADO EN WINNIPEG-CANADA, ENTRE EL 14 Y 17 DE JUNIO DE 2004).
ACTIVIDAD A REALIZARSE EL DÍA 30 DE JULIO DE 2004,
A PARTIR DE LAS 15,00 HRS., EN EL RECINTO SOFO DE TEMUCO

Nº	NOMBRE	PREDIO/EMPRESA	ACTIVIDAD/PROFO	DIRECCIÓN POSTAL	TELEFONO	CIUDAD	Conf
31.	Jorge Ortiz Quiroz		Profo Ovino	Villa Alegre 929		P. Las Casas	
32.	José Arnoldo Mora Arriagada		Profo Red Sur	Sargento Aldea 326		Lautaro	
33.	José Gregorio García García	Fundo Santa Olga	Profo Raza Clavel	Casilla #14	09-8472084	Cunco	SI
34.	Juan Bautista Larrondo Jara		Profo Red Sur	Gronow 345	391739 09-2190670	Pitrufquén	SI
35.	Juan Carlos Morstadt		Profo Ovino	Vicuña Mackenna 466		Temuco	
36.	Leonardo García Echavarri		Profo Raza Clavel	Manuel Montt Nº850 Of. 504	45-212027	Temuco	NO
37.	Leonardo García Sabugal		Profo Raza Clavel	Manuel Montt Nº850 Of. 504	45-221727	Temuco	NO
38.	Luis Bornand Larrondo		Profo Red Sur	Av. O'Higgins 290		Pitrufquén	
39.	Luis Recaredo Figueroa Figueroa		Profo Red Sur	Arturo Prat 109 Of.2	235273 09-6804382	Temuco	SI
40.	Mª Angélica Vásquez		Profo Red Sur	Bello 765 Of. 53	741033	Temuco	NO
41.	Manuel Riesco J.		SOFO A.G.	San Martín 838		Temuco	
42.	Mario García Sabugal		Profo Raza Clavel	Panamericana Sur Km.676 (Magasa)	45-338888	Temuco	NO
43.	Moisés Manríquez B.	Técnico Agrícola	INIA Carillanca	Casilla 58-D	215706	Temuco	SI
44.	Nelson Albornoz	Agríc. y Comercial NAR Ltda.	Profo Red Sur	Holandesa 495		Temuco	
45.	Nilo Lizama Arias		Ingeniero Agrónomo	Casilla 880	737456	Gorbea	SI
46.	Osvaldo Meier Hunter		Profo GBC				

NOMINA DE INVITADOS A CHARLA DE DIFUSIÓN CON MOTIVO DE ASISTENCIA A "CONGRESO MUNDIAL DE LA CARNE" (REALIZADO EN WINNIPEG-CANADA, ENTRE EL 14 Y 17 DE JUNIO DE 2004).
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Nº	NOMBRE	PREDIO/EMPRESA	ACTIVIDAD/PROFO	DIRECCIÓN POSTAL	TELEFONO	CIUDAD	Conf
47.	Patricio Bornand Larrondo		Profo Red Sur	Matta 243		Pitrufquén	
48.	Patricio Paredes		FIA		08-6292441		SI
49.	Patricio Sauterel Ruf		Profo Ovino	Psje. Lancaster 03096		Temuco	
50.	Raúl Norambuena S.				09-7586739	Collipulli	SI
51.	René Araneda A.		SOFO A.G.	San Martín 838	403100	Temuco	NO
52.	René Echavarri		Profo Ovino	Pineda de Mar 01710 Villa Campalau		Temuco	SI
53.	Roberto Arriagada D.		Profo Ovino	Psje. El Llano 02631	09-8879037	Temuco	SI
54.	Selvin Ferrada N.	Ing. Agrónomo	INIA Carillanca	Casilla 58-D	215706	Temuco	NO
55.	Sergio Cáceres		Practicante INIA Carillanca	Casilla 58-D	215706	Temuco	SI
56.	Sergio Sánchez Del Canto		Profo GBC				
57.	Tomás Echavarri Peña		Profo Red Sur	A. Prat 515 Of.42		Temuco	
58.	Vicente Schnettler Rehbein	Soc. Agric. El Parque	Profo Red Sur	Holandesa 0930		Temuco	SI
59.							
60.							
61.							