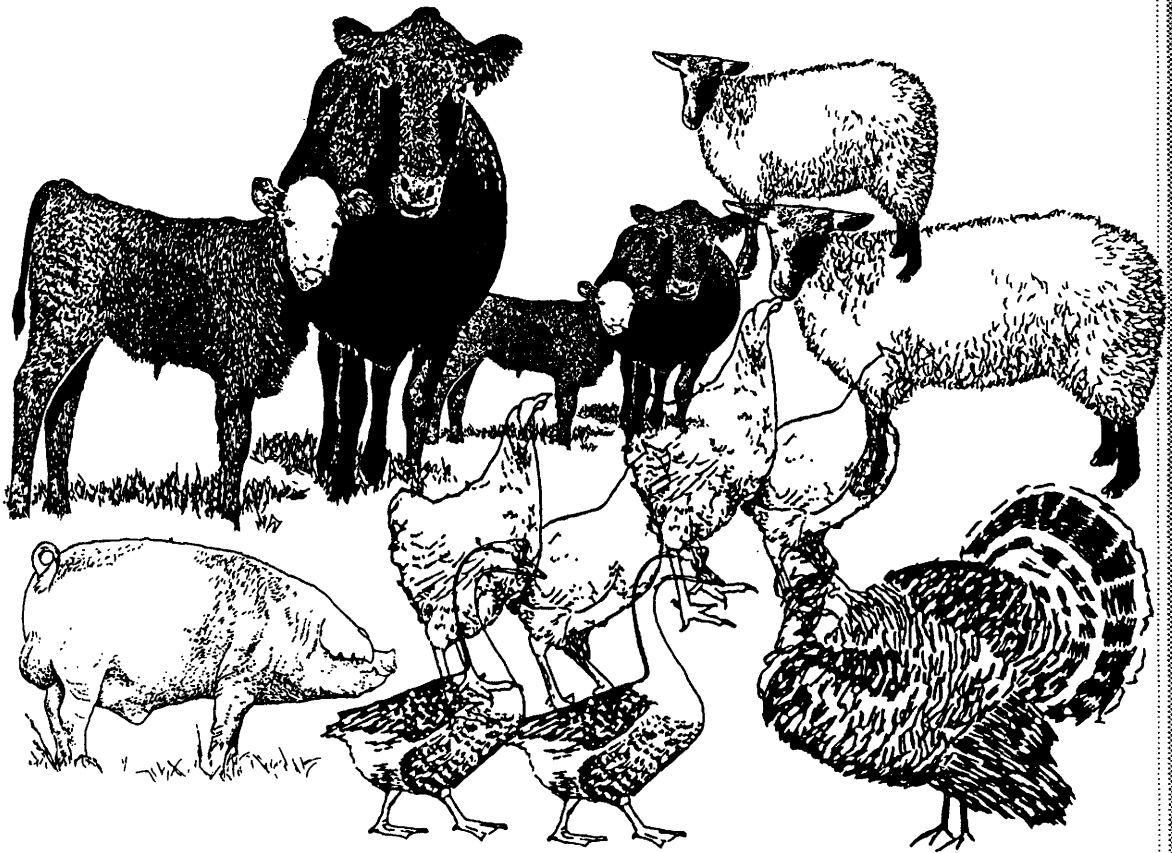


EUROPEAN COMMISSION  
DIRECTORATE-GENERAL FOR AGRICULTURE

# CAP WORKING NOTES 1994



**MEAT**

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

The information in this document is arranged in three parts:

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

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

The common organization is governed by Regulation (EEC) No 805/68, as last amended by Regulation (EEC) No 125/93.

It covers the following products:

- live animals;
- meat: meat, fresh, chilled or frozen, other;
- processed products: other preparations and preserves of meat or offal, cooked or uncooked;
- offal.

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

In 1992, expenditure on beef/veal accounted for 14.1% of total EAGGF Guarantee spending.

#### 1. ECONOMIC BACKGROUND

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

The economic situation, having improved somewhat from 1983 onwards, beef/veal consumption showed a rise of about 5% until 1988. After some stabilization in 1989, consumption of beef/veal fell by 4.9% in 1990 as a result of the BSE scare. A slight increase occurred in 1991, followed by a new decrease in 1992.

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(\*) Translated from "Avant-projet de budget général des Communautés européennes pour l'exercice 1994".

The rate of self-sufficiency, which exceeded 100% up to 1988, was below 100% in 1989; in 1990 it rose again to 109.6%, 113.5% in 1991 and 110.5% in 1992. With the slowdown in production, it is likely to be around 104% in 1993.

As regards trade, the Community imported 500 000 t of beef/veal in 1990 and exported 816 000 t, giving a surplus of 316 000 t. As a result of strong demand, principally from East European countries, exports rose to 1 325 000 t in 1991. With imports totalling 535 000 t, the net export surplus in 1991 came to 790 000 t. For 1992 imports are put at 565 000 t and exports at 1 250 000 t.

## 2. OPERATION OF THE MARKET

### 2.1. Price arrangements

Every year the Council fixes two categories of prices:

- (a) The guide price: The guide price is fixed for adult bovine animals at ECU 200/100 kg live weight, in the light of the outlook for production and consumption, of the situation of the milk and milk products market and of past experience. It is the desired average price on the Community market for all quantities marketed during the marketing year. The guide price and the Community market price are used as a reference to determine the relevant import levies.
- (b) The intervention price: This is the price (ECU 343/100 kg carcass weight for R3 adult male bovine animals) which determines support for the market in beef/veal.

Under the reform, this price was fixed by Council Regulation (EEC) No 2068/92 at ECU 328.85 per 100 kg carcass weight (-5%) with effect from 1 July 1993.

### 2.2. Specific market instruments

#### 2.2.1. Import and export arrangements

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

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

There are also special schemes in certain fields.

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

#### 2.2.2. Storage

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

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

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

The buying-in price is determined by tendering procedure. Nonetheless, a buying-in scheme may be established as a safety net, relating to all tenders submitted, when the Community market price falls below 78% of the intervention price and when the market price falls below 60% of the intervention price in a single Member State or region. For 1993, buying-in under the normal arrangements may not exceed 750 000 t. For 1994, the limit will be 650 000 t.

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

#### 2.2.3. Premium system

From 1993 the premium system has been adjusted to the new situation resulting from the CAP reform and incorporated into the basic legislation on the market organisation (Council Regulation (EEC) No 805/68). The premiums under the new arrangements are designed to:

- offset the loss of income resulting from the cut in the intervention price (special premium and suckler cow premium);
- establish market equilibrium throughout the year (seasonalisation premium);
- encourage extensification (additional amount);
- reduce beef production in dairy herds (calf processing premium or, alternatively, intervention arrangements for lightweight carcasses).

a) Special premium

Fixed at ECU 60 for 1993, the special premium is granted within ceilings set at regional level (in accordance with a reference year chosen by the Member State concerned) on up to 90 animals per age bracket (10 months and 22 months) per calendar year and per holding. To qualify for the premium each animal must be kept by the producer for at least two months for each age bracket. Member States may choose to grant the premium at the farm, at the time of slaughter or on a mixed basis (first payment on the farm, second payment on slaughter).

b) Deseasonalisation premium

In addition to the special premium, producers in Member States where the number of male cattle slaughtered during the period 1 September to 30 November is more than 40% of total annual slaughterings of male cattle may qualify for a premium if they switch the slaughter of these animals to the period 1 January to 30 March of the following year.

c) Suckler cow premium

Amounting to ECU 70 (ECU 160 in Portugal), per eligible animal for 1993, this premium is intended for producers who do not deliver milk or milk products and small producers (under 120 000 kg milk reference quantity) who keep suckler cows for a minimum period of six months from the date of submission of the application. Entitlement to the premium is limited by the application of an individual ceiling corresponding to the number of animals qualifying for the premium during a reference year, also chosen by the Member State; rights may be sold or transferred with or without farms. The Member States form a national reserve of rights with rights withdrawn from producers and a special reserve for less-favoured areas.

Member States may award an additional national premium of up to ECU 25 per cow, the first ECU 20 being chargeable to the EAGGF Guarantee Section on holdings in regions regarded as lagging behind in their development.

d) Additional amount

Where the stocking density (number of animals kept on the holding in proportion to the utilized forage area) is less than 1.4 livestock units (LU) per hectare, the producer receives an additional amount of ECU 30 per head over and above the special premium or suckler cow premium payable.

e) Calf processing premium

Farmers may qualify for a premium of ECU 100 per male dairy calf withdrawn from production before the age of 10 days and processed in a centre approved by the Member State. Alternatively, the Member States may decide not to apply the processing premium. In that case they participate in the special intervention arrangements for male cattle carcasses originating in the Community weighing between 150 and 200 kg.

Finally, the number of animals that may qualify for the special premium or the suckler cow premium is limited by the application of a stocking density factor of 3.5 LU in 1993 (3 LU in 1994) per hectare used for livestock feeding for which a premium application has been submitted.

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

This Regulation, which was made generally applicable by Regulation (EEC) No 1186/90, standardizes the classification of carcasses in the Community. Market prices are recorded on the basis of carcass weight at the slaughterhouse and expressed according to the reference presentation established by the Regulation. By Regulation (EEC) No 869/84 the Council decided that intervention measures for carcasses of adult bovine animals were to be applied on the basis of the Community scale from 9 April 1984. It has enabled a single buying-in price to be fixed for each quality of fresh or chilled meat eligible for intervention. Classification became compulsory in all approved slaughterhouses on 1 January 1992 (Regulation (EEC) No 344/91).

2.2.5. Quality beef promotion and marketing programme

Under the CAP reform, a promotion and marketing programme for quality beef was introduced by Council Regulation (EEC) No 2067/92.



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

The market organization for sheepmeat and goatmeat is governed by Regulation (EEC) No 3013/89.

The products covered are the following:

- live animals;
- meat: fresh, chilled or frozen;
- processed products: meat and offal of sheep and goats, salted, dried or smoked, preserved, other;
- offal.

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

Expenditure in this sector accounted in 1992 for 5.6% of total EAGGF Guarantee expenditure.

#### 1. ECONOMIC BACKGROUND

The gross Community production of sheep and goatmeat in 1992 was 1 172 000 t (EUR 12), i.e. a decrease of 4.1% on the 1991 figure. It is still too early to say whether this marks a halt in the long-term upward trend seen since 1970. The number of sheep is about 100 million (EUR 12). The Community is the world's second largest producer, the largest being the States comprising the former USSR.

In 1992 Community consumption was 1 430 000 t (EUR 12). The long-term trend is upward in all Member States at a slightly slower rate than the increase in production.

The degree of self-sufficiency is at present about 82% (EUR 12).

As regards trade, in 1992, the EC imported 260 000 t of sheepmeat, in particular from New Zealand; its exports totalled 5 000 t.

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(\*) Translated from "Avant-projet de budget général des Communautés européennes pour l'exercice 1994".

## 2. OPERATION OF THE MARKET IN SHEEPMEAT

### 2.1. Price arrangements

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

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

### 2.2. Specific market instruments

#### 2.2.1. Import and export arrangements

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

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

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

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

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

#### 2.2.2. Private storage

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

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

### 2.2.3. Premiums

#### (a) Ewe and goat premium

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

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

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

In some clearly defined regions of the Community, eligibility for the premium has been extended to two categories of animal, namely she-goats and certain female sheep other than ewes. In these cases, the unit amount corresponds to 80% of the ewe premium.

A distinction is made between ewes producing heavy lambs and those producing light lambs. The calculation of the loss of income and the productivity coefficient are limited to the production of heavy lambs. The resulting amount is granted on ewes producing heavy lambs, while for ewes producing light lambs the amount is reduced by 20%.

#### (b) Variable slaughter premium

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

### 2.3. Stabilizer

From 23 May 1988, where the ewe headage for a marketing year exceeds the maximum guaranteed quantity, the premiums are reduced by the impact on the basic price of a coefficient representing a 1% cut in the basic price for each 1% tranche by which the maximum guaranteed quantity is exceeded. For 1992, the stabilizer was fixed at 7%.

### 2.4. Reform of the common agricultural policy

In view of the increase in expenditure in this sector, the Council, acting on a proposal from the Commission, decided on the following measures in June 1992:

- an individual limit on guarantees, each producer being able to receive the ewe (or she-goat) premium only within the limit of the quantities received for the 1991 marketing year (after deduction of between 1 and 3% to resource a national reserve). Also, where the ewe headage in a Member State increased between 1989 and 1991 the increase would be added to the individual limits of each producer;
- the freezing of the stabilizer at 7%.

## DESCRIPTION OF THE MECHANISMS

### OF THE COMMON MARKET ORGANIZATION FOR PIGMEAT (\*)

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

The products covered are:

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

The marketing year runs from 1 July to 30 June.

Expenditure in this sector is less than 1% of total EAGGF Guarantee expenditure (0.5% in 1992).

#### 1. ECONOMIC BACKGROUND

In 1992, about 14.2 million t of pigmeat was produced in the Community (EUR-12), an increase of 1% on the previous year.

The market in pigmeat in the Community can be split into two distinct periods in 1992. During the first six months the situation was very favourable and market prices stood at ECU 150/100 kg. From July onwards, prices fell sharply, to reach their lowest level in December (ECU 106/100 kg). The reasons for this decrease were a substantial upturn in production, combined with health and monetary problems.

Production in 1993 is expected to rise by about 2.5%. During the first quarter of 1993 prices remained stable but fairly low, around ECU 110/100 kg. The supply of pigmeat is likely to remain abundant until autumn 1993.

Overall self-sufficiency in 1992 is put at between 103 and 104%.

As for trade with non-member countries, imports amounted to 50 000 t in 1992 and exports to 430 000 t, excluding offal and lard.

#### 2. OPERATION OF THE MARKET

##### 2.1. Price arrangements

The pigmeat market organization has three prices:

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(\*) Translated from "Avant-projet de budget général des Communautés européennes pour l'exercice 1994".

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

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

## 2.2. Specific market instruments

### 2.2.1. Import and export arrangements

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

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

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

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

### 2.2.2. Storage

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

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

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

The aid is fixed:

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

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

## DESCRIPTION OF THE MECHANISMS

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

The poultry market organization is governed by Regulation (EEC) No 2777/75, as last amended by Regulation (EEC) No 3714/92.

The products covered are as follows:

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

There is no marketing year for poultry.

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

#### 1. ECONOMIC BACKGROUND

In 1992, the Community of Twelve's gross internal production of poultrymeat was 6.9 million t (+2.1% compared with 1991).

Consumption increased by 2% to an average of 19 kg per person.

The degree of self-sufficiency in 1992 was 105.4% (stable).

As regards trade, imports in 1992 rose by 4.6% (159 000 t). Exports were also up 1.9% on 1991, to a tonnage of 487 000 t.

#### 2. OPERATION OF THE MARKET

##### 2.1. Price arrangements

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

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

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(\*) Translated from "Avant-projet de budget général des Communautés européennes pour l'exercice 1994".



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

## 2.2. Specific market instruments

### 2.2.1. Import and export arrangements

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

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

The levy may be reduced within certain limits (association agreements, generalized preferences scheme, ACP agreement, French overseas countries and territories).

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

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

Trend of appropriations (\*)

(ECU)

Article	Heading	Appropriations 1994	Appropriations 1993
B1-210	Refunds on beef/veal	902.000.000	1.106.000.000
B1-211	Intervention storage of beef	1.608.000.000	1.947.000.000
B1-212	Intervention other than storage of beef	2.276.000.000	1.071.000.000
TOTAL OF CHAPTER B1-21 (BEEF/VEAL)		4.786.000.000	4.124.000.000
B1-220	Export refunds for sheepmeat and goatmeat	p.m.	p.m.
B1-221	Intervention in the form of storage of sheepmeat and goatmeat	7.000.000	9.000.000
B1-222	Intervention other than storage of sheepmeat and goatmeat	1.580.000.000	2.258.000.000
TOTAL OF CHAPTER B1-22 (SHEEPMEAT AND GOATMEAT)		1.587.000.000	2.267.000.000
B1-230	Refunds on pigmeat	122.000.000	208.000.000
B1-231	Intervention for pigmeat	46.000.000	36.000.000
B1-239	Other intervention	26.000.000	27.000.000
TOTAL OF CHAPTER B1-23 (PIGMEAT)		194.000.000	271.000.000
B1-241	Refunds on poultrymeat	146.000.000	208.000.000
B1-249	Other intervention	p.m.	p.m.
TOTAL OF CHAPTER B1-24 (EGGS AND POULTRY-MEAT) FOR WHAT CONCERNS POULTRYMEAT		146.000.000	208.000.000

(\*) Extracted from "Final adoption of the general budget for the European Union for the financial year 1994"  
- OJ L 34, 7.2.1994.

THE SITUATION OF THE MARKETS (\*)

**Beef and veal**

As in the past the trend in the general economy in the various parts of the globe continued to influence the world market in meat. World production of beef and veal in 1992 and 1993 fell off by about 2.4% while the long-term trend was for growth of about 2% per annum.

The prices of beef and veal recorded on domestic markets and in trade were encouraging, especially in the area free of foot-and-mouth disease.

Economic growth is continuing apace in the countries of South-East Asia where there is a growing need for meat imports. These dynamic importing markets favour above all exports from those countries which are known to be free of foot-and-mouth disease, in particular the USA and the countries of Oceania.

On the other hand, in the countries of central and eastern Europe and in the Commonwealth of Independent States (CIS), where the economic difficulties caused by the transition from a planned economy to a market economy are severely felt, the general trend is towards a reduction in cattle numbers and in production, consumption and commercial trade in beef and veal.

On the North American markets, where economic activity is slowly recovering, agreements negotiated with the traditional suppliers were introduced so as to restrict on a voluntary basis exports of beef and veal to the USA and to impose a tariff quota on imports of beef and veal into Canada.

In the main countries of Latin America, the relatively encouraging prices of beef and veal should enable the capitalization of the cattle herd to continue but will result in a short-term reduction in beef and veal production and an attendant stagnation in the volume of meat exports.

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(\*) Extract from "The agricultural situation in the Community. 1993 report."

Beef and veal production

(in '000 tonnes carcase weight)

	1991	1992	% change	1993	% change
USA	10.534	10.611	+ 0,7	10.653	+ 0,4
CIS	8.190	7.300	-10,9	6.800	- 6,8
Argentina	2.607	2.492	- 4,4	2.557	+ 2,6
Brazil	4.725	4.880	+ 3,3	5.000	+ 2,5
Australia	1.735	1.775	+ 2,3	1.750	- 1,4
Japan	575	591	+ 2,8	600	+ 1,5
China	1.545	1.725	+11,7	2.005	+16,2
India	2.361	2.398	+ 1,6	2.450	+ 2,2
EUR 12	8.723	8.396	- 3,7	8.050	- 4,1
World	54.128	53.263	- 1,6	52.823	- 0,8

There was a rapid change in cattle-rearing structures in the European Community during the 1980s which resulted in the disappearance of a million farm holdings.

The Community produces some 16% of total world production of beef and veal (second only to the USA) and through its exports in particular accounts for about 25% of world trade in beef and veal. Imports under special multilateral and bilateral agreements for the most part, including the agreement relating to the ACP/EC Convention which was expanded on 1 March 1993 and the agreement which took effect on 1 July 1993 with the countries of central and eastern Europe to facilitate and increase imports of meat, amounted to more than 572 000 tonnes in 1992, an increase of 7.1% over imports in 1991.

In 1992, exports of beef and veal were maintained at 1.32 million tonnes.

As part of the cyclical trend in prices and production, prices for beef and veal and for female animals in particular remained relatively firm.

Production dropped by more than 700 000 tonnes or 8.5% between 1991 and 1993, to stand at around 8 million tonnes. The current cyclical drop in the numbers of cattle slaughtered is around 10%.

Annual consumption, at around 22 kg/per person, remained stagnant because of competition from cheaper meats, the depressed economic climate and specifically because of the impact of health or veterinary problems affecting the image of beef and veal at consumer level.

Buying-in was severely curtailed and amounted to less than 200 000 tonnes and the stocks of meat in intervention dropped from 1.1 million tonnes at the end of 1992 to less than 500 000 tonnes deadweight at the end of 1993.

The intervention price for beef dropped by 6.2% at the beginning of July 1993 to stand at ECU 321.64/100kg carcass weight for R3 category adult male animals and the main premiums already in force were increased to compensate for the policy change which had been decided in May 1992.

Sheepmeat and goatmeat

World sheepmeat and goatmeat production is currently estimated at approximately 10 million tonnes annually. The Community and China are the largest producers with levels of 1.2 million tonnes each but the Community is both the world's largest importer and consumer. World trade is dominated by New Zealand which exports up to 400 000 tonnes of meat each year and Australia whose exports, often in the form of live animals, reach over 300 000t annually. World sheep numbers, in 1992, reached 1 700 million head of which 700 million in Asia and almost 400 million in Africa. However, wool rather than meat production is the main purpose of many of these animals and with world wool stocks remaining high there is little prospect for any growth in numbers in coming years.

Production of Sheepmeat (1 000t)

	<u>1991</u>	<u>1992</u>	<u>Variation%</u>	<u>1993(prov.)</u>	<u>Variation%</u>
EEC 12	1225	1181	- 3.6	1,182	+ 0.1
New Zealand <sup>(1)</sup>	575	585	+ 1.7	481	-17.8
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On the Community market, production is forecast to rise by just 0.1% to 1 182 000t in 1993 due mainly to slight rises in Dutch, Irish and UK production. French production is set to fall by 8000t in continuance of the destocking trend evident for several years. Consumption may fall marginally to 1 425 000t as a dramatic decline of over 12% in the UK may not be fully balanced by modest increases elsewhere throughout the Community. The decline in consumption in the United Kingdom since 1991 is now estimated at 94 000t.

Intra Community trade is forecast to rise by 15% to 305 000t. Thus, in the two-year period since the demise of the variable slaughter premium in Great Britain at the end of 1991, intra Community trade will have risen by almost 90 000t. An important factor in this increase is the expected very sharp rise in live exports from the UK to France. In France itself, imports are forecast to reach 190 000t up 13% on 1992. In addition, imports into southern Member States from the rest of the Community are set to increase substantially from the low levels of previous years due mainly to the absence of sheep coming into these regions at Easter from Eastern Europe because of foot and mouth disease restrictions.

(1) Year ending 30 September

Market prices in 1993 to date have been influenced not only by the relatively stable Community supply but also by currency changes in several of the more important sheep producing and trading Member States and by the restrictions on certain imports in the Spring due to foot and mouth disease. In national currency, prices have been satisfactory in most Member States but nevertheless the Community price, forecast at ECU 258 per 100 kg will be down approximately 7% on 1992.

Imports into the Community in 1993 are expected to reach 260 000t. New Zealand is likely to fulfil its Voluntary Restraint Agreement quantity of 205 000t while it is anticipated that eastern European suppliers will attempt to make up for reduced imports in spring by increased supplies in the period up to Christmas 1993. Community exports are unlikely to be greater than 5000t.

Adaptations agreed by the Community with its trading partners under the voluntary restraint agreements for the period up to the end of 1993 have had the effect of reducing possible imports under these arrangements by approximately 45.000t and of reducing the levy on imports from 10% to zero.

The level of the Community ewe premium set for 1992 was ECU 18.616 per ewe. This level was increased to ECU 23.130 in Ireland and Northern Ireland due to depressed market conditions following the currency difficulties of Autumn 1992 and the rural world premium applicable in less favoured areas was increased from ECU 5.5 to 7 per ewe for similar reasons. Private storage stocks of lamb amounted to just 2000t at the end of 1992.

In 1993 two advances on the ewe premium were fixed totalling ECU 13.366 per ewe. Although private storage tendering was in use throughout the year only 2000 t benefited from the aid, and this quantity remained in stock at the end of the year.

The outlook for 1994 is for stability or a slight rise in production as producers adapt to the premium quota regime. Consumption should rise in accordance with production. Sheep numbers will remain stable at approximately 99 million head but intra Community trade will continue to expand. A similar trend may be forecast in the medium term.

Pigmeat

World production of pigmeat increased over 1992. The rise is especially evident in the three main producer countries, China, the Community and the United States. China remains the foremost pigmeat producer followed by the European Community and the United States, respectively. The increase in production in China has been spectacular in the last three years (up 4 million tonnes of meat between 1991 and 1993). The sector is in full expansion in the United States, with production increasing 11.6% in the last three years. Furthermore, exports to Japan and Mexico in particular have increased by about 10% over 1992 (a record year in which exports rose by 44% over the previous year).

On the other hand, the drop in production has continued in the countries of the former Soviet Union and in Japan.

World pigmeat production

('000 tonnes)

	1991	1992	1993 estimate
China	24 500	26 000	28 500
EUR 12	14 339	14 411	14 971
United States	7 257	7 826	8 097
Eastern Europe	5 489	5 312	5 043
CIS	5 634	4 875	4 662
JapAn	1 483	1 430	1 380
Taiwan	1 126	1 124	1 150
Canada	1 129	1 175	1 150
<b>Total</b>	<b>60 957</b>	<b>62 174</b>	<b>64 918</b>

Source : USDA, Eurostat

1993 in the Community was characterized by a sharp drop in pigmeat prices and margins following a long period of satisfactory prices for producers.

From September 1992, the price of slaughtered pigs has continued to fall and at the end of 1993 was below ECU 100/100kg.



A strong increase in the pig herd since 1991, accompanied by precarious animal health conditions in 1993 (in chronological order, swine vesicular disease in the Netherlands, classical swine fever in Germany and Belgium, African swine fever in Portugal) have added to this difficult situation.

The Commission took a number of market support measures to cope with the very depressed market in 1993. In March, aid for the private storage of 67 000 tonnes of pigmeat was granted and in May and October special refunds for exports to non-traditional markets in eastern Europe were granted with a view to disposing of 60 000 tonnes of meat in total.

Community production of pigmeat continued to increase, reaching 14.9 million tonnes in 1993. Production has increased by 4.4% since 1991. Consumption has increased slightly but there is still a North-South divide in Community consumption patterns. In the northern countries consumption is now stable, whereas in the southern countries there is still scope for an increase.

Exports to non-member countries amounted to 516 000 tonnes in 1992 while imports, originating mainly in the countries of eastern Europe, amounted to 119 000 tonnes. Imports are expected to increase in 1993, because higher import quotas have been allocated to the eastern European countries. Exports to the Community's traditional markets of the United States and Japan will remain stable in 1993. However, the overall volume of exports could increase over 1992 as a result of meat deliveries to some countries of the former Soviet Union.

Poultrymeat

During the last six years world production of poultrymeat has increased steadily by an average of 3.6% a year. In the United States (31% of world production), the rate of increase has been even higher (5%). Poultrymeat is now the meat Americans prefer and per capita consumption has exceeded that of beef and veal for the last six years. In the other main producer regions, production has increased in Brazil and China (annual rate of increase: 10.9%) but has fallen in eastern Europe, Russia included, and in Japan.

Poultrymeat production  
( '000 tonnes)

	1987	1988	1989	1990	1991	1992	1993
United States	9 105	9 272	9 931	10 645	11 204	11 885	12 419
Brazil	1 865	1 997	2 139	2 416	2 691	2 932	3 165
China	2 040	2 744	2 820	3 229	3 952	4 540	5 100
Japan	1 465	1 471	1 423	1 391	1 357	1 367	1 355
Former USSR	3 126	3 107	3 233	3 169	3 023	2 706	2 517
Eastern Europe	2 068	1 910	1 321	1 361	1 020	941	880
EUR 12	5 784	5 997	6 108	6 336	6 756	6 963	7 032
Others	5 818	6 195	6 174	6 447	6 777	7 643	8 026
World prod.	31 271	32 693	33 149	34 994	36 780	38 977	40 494

(Since 1991 the data for EUR 12 include the five new German Länder.)

The world market continued to expand slightly in 1993 thanks in particular to growing demand in the Far East. The United States retained first place in the league of exporting countries due in particular to its exports of low-value cuts and to its various promotional programmes. In the first half of 1993, exports from the United States increased by 122 000 tonnes (+31%) over the equivalent period in 1992, while Community exports increased by 40 000 tonnes (+21%).

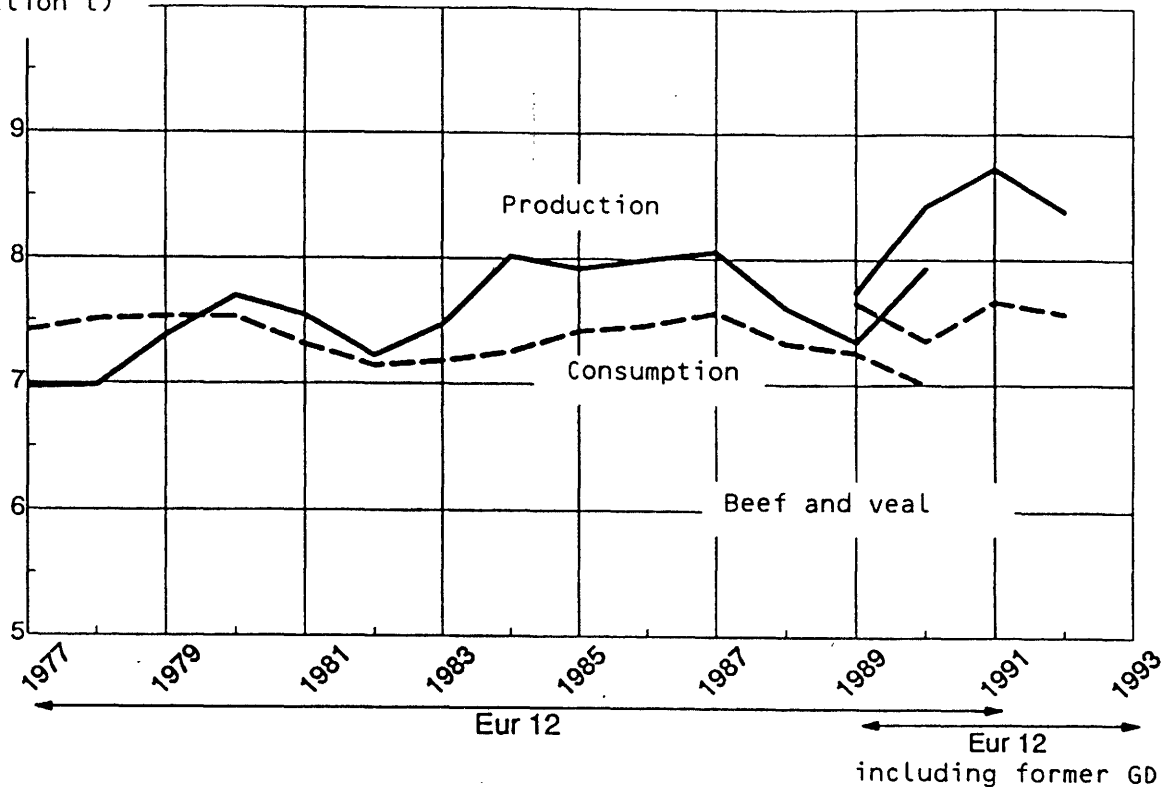
Total production of poultrymeat on the Community market increased by 1% in 1993. This lower increase than in previous years concerned the chicken, turkey and duck sectors and was the result of slowed or stagnant production.

There is no internal market support for poultrymeat. The rules governing trade with non-member countries have been adapted to the world market situation by differentiating export refunds according to destination so as to maintain trade flows and also by reducing the size of such refunds in proportion to the drop in the price of cereals caused by the reform.

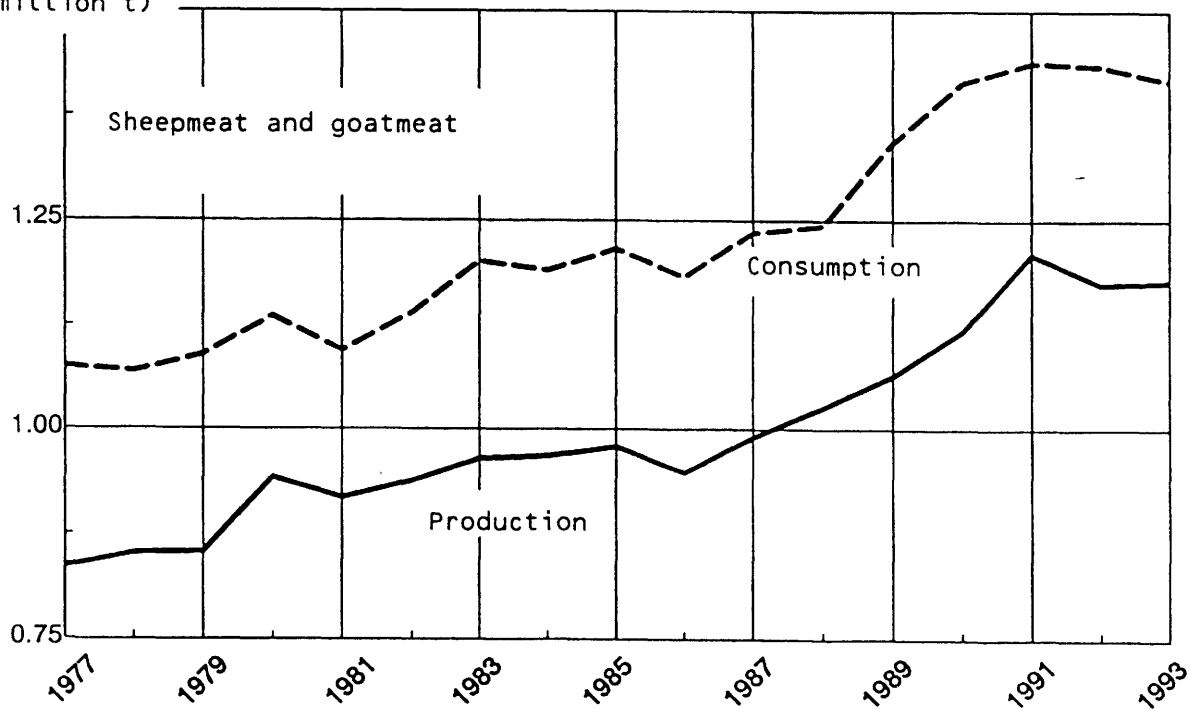
In 1993, the concessions granted by the Community under the generalized system of preferences to developing and ACP countries continued. The association agreements concluded with Poland, Hungary and the former Czechoslovakia involve a 50% reduction in the levies on certain quantities of geese and ducks and, as a result of decisions taken at the Copenhagen summit, a 60% reduction since 1 July 1993 (instead of 40%) for chickens and turkeys.

### M E A T

(million t)

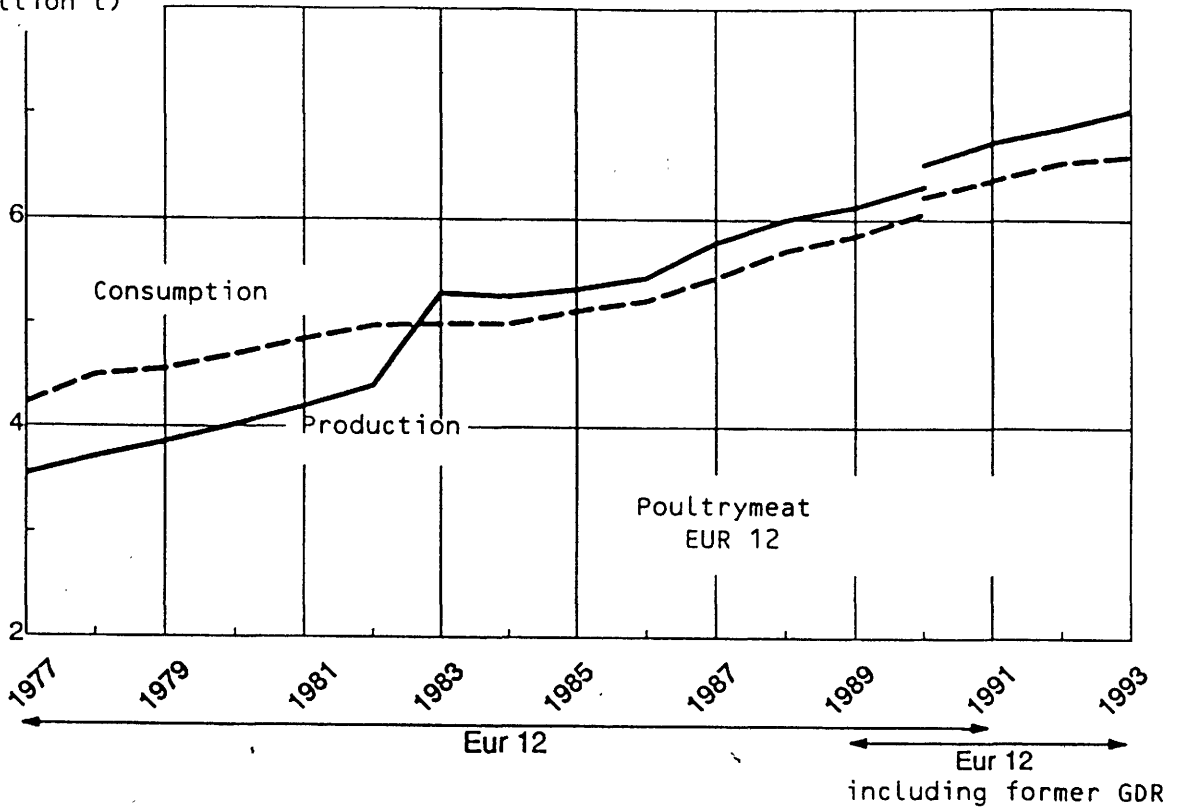


(million t)

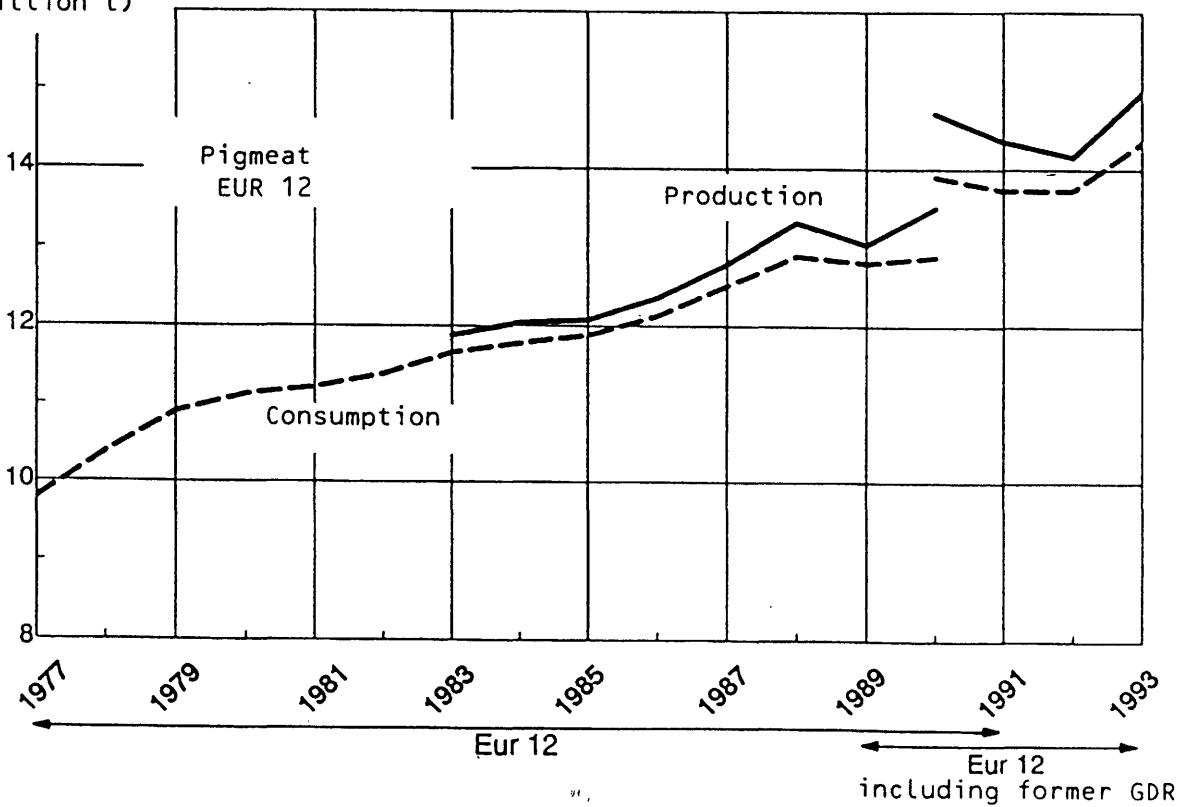


M E A T

(million t)



(million t)



COMMISSION PRICE PROPOSALS (\*)

BEEF AND VEAL

*Prices*

It is proposed that the marketing year be extended to 30 June 1994 and that the guide price for 1994/95 be kept at the same level as in 1993/94, i.e. ECU 197.42/100 kg live weight. As regards the intervention price, the second 5% cut decided on as part of the reform (Regulation (EEC) No 2068/92) will bring the intervention price to ECU 304.71/100 kg carcase weight (quality R3) for the period 1 July 1994 to 30 June 1995.

*Premiums*

Under the reform provisions incorporated into Regulation (EEC) No 805/68, the special premium for male animals will be raised during the 1994/95 marketing year to the level of ECU 75 in 1994 and ECU 90 in 1995 and the suckler cow premium to ECU 95 in 1994 and ECU 120 in 1995. The stocking density factor, on the other hand, will be reduced to 3 LU/ha in 1994 and 2.5 LU/ha in 1995.

Nonetheless, as the Commission has already indicated in its report on the beef and veal sector at the end of November, the number of animals included in the regional references for male cattle premiums exceeds the number of premiums granted in previous years by over 30% generally and in some Member States by as much as 50%. This unexpected result, the reason for which lies in the possibility of taking 1992 as the reference year has meant that the objectives of the reform, i.e. to curb production and stabilise expenditure, will not be attained. The Commission therefore proposes that the relevant provisions concerning the special premium for male cattle in the basic Regulation (Article 4b(3)) be amended, laying down that the Member States may choose 1989, 1990 or 1991 as the reference year, but not 1992.

Finally, as regards the male cattle premium, Article 4b(2) lays down that the second premium payment can be made when the animal reaches the age of 22 months. This applies mainly to bullocks as bulls are generally slaughtered before the age of 18 months. A 22-month old bull has most likely passed the optimum fattening age and is liable to produce a carcase of lower commercial value. The Commission therefore proposes that the second premium payment be restricted to bullocks aged 22 months. The purpose of this provision is to deter producers from continuing fattening bulls simply in order to obtain the second premium, thereby producing carcasses of lower commercial value.

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(\*) Extracted from "Commission proposals on the prices for agricultural products and on related measures 1994/95 - Explanatory memoranda"  
[COM(94) 10 final - Vol. 1]

## SHEEPMEAT AND GOATMEAT

### *Prices*

The institutional prices for the 1994 marketing year were fixed in the 193/94 prices package.

For 1995/96 the Commission proposes that the basic price remain at the level already decided for 1994/95.

### *Private storage aid*

The Commission proposes that the seasonal adjustment of the basic price serving to trigger private storage measures be kept unchanged. However, in the light of experience gained, the Commission proposes that, when the price conditions are met, an invitation to tender for private storage aid be made optional. This will enable the commission to decide, in consultation with the Management Committee concerned, whether it is appropriate to issue an invitation to tender for private storage aid, avoiding periods of the year when private storage aid would prove inopportune. This option does not represent any change in the policy followed hitherto as the Management Committee has regularly delivered an opinion rejecting tenders at such periods. This measure has the twin advantages of administrative simplification and avoiding the pointless submission of tenders by operators.

## PIGMEAT

The basic Regulation for pigmeat provides for the fixing of a basic price. Its level is primarily meant to indicate the level of prices at which the market will be in balance, i.e. which contributes towards stabilizing market prices without, however, leading to structural surpluses. The only operational purpose of the basic price is to provide a trigger for possible private storage aid. Such a scheme may be initiated when the average market price in the Community falls below 103 % of the basic price. The basic price is in force from 1 July to 30 June.

For the period July 1993 to June 1994 the basic price for pig carcasses of standard quality was fixed at 1872.00 ECU/t.

Over the years the basic price has been allowed to deviate considerably from its intended level and it has thereby become operationally irrelevant. It is therefore appropriate to propose a significant reduction in the basic price to bring it back to its original purpose of indicating the proper point of balance.

Such a reduction in the basic price does not entail any reduction in market prices, because of its limited function.

The price for pig carcasses at which the EU-market would be in balance may be estimated to be around ECU 1200/t, taking into account in particular the anticipated further reduction in grain prices.

However, in view of the difficult situation of the soya bean market following a poor harvest in the USA and its impact on the cost of feed, it is proposed to fix the level of the basic price for the marketing year 1994/95 at ECU 1300.00/t.

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

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

Price proposals in ECUs

Product and type of price or amount (Period of application)	Decisions 1993/94 (1)		Proposals 1994/95	
	Amounts ECU/T	% change	Amounts ECU/T	% change
1.7.94-30.6.95 Beef/veal				
- Guide price for live adult bovine animals	1 974,2	0	1 974,2	0
- Intervention price R3 carcasses	3 216,4	- 5%	3 047,1	- 5%
	<u>1993</u>		<u>1994</u>	
- Male bovine animal premium (calendar year) (2)	60	-	75	+ 25
- Suckler cow premium (calendar year) (2)	70	-	95	+ 36
2.1.94-1.1.95 Sheepmeat				
- Basic price (carcase weight)	4 174,5	0	4 174,5	0
1.7.94-30.6.95 Pigmeat				
- Basic price (carcase weight)	1 872	- 1,3	1 300	- 30,5

- (1) Account taken of the agrimonetary corrections. For Spain and Portugal, the amounts could be slightly different in 1993/94 for certain products.
- (2) In ECU/head. The required density changes from 3,5 to 3 LU/ha. The other premiums (deseasonalization, calf conversion, extensification) are maintained at the level set in the May 1992 reform.



**STATISTICAL TABLES (\*)**

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

	1 000 head			% of EUR 12	% TAV	
	» 1987 «	1992	1993	1993	» 1991 « » 1987 «	1993 1992
1	2	3	4	5	6	7
EUR 12	80351	81438	79580	100,0	0,5	- 2,3
Belgique/België	2961	3106	3138	3,9	1,4	1,0
Danmark	2348	2222	2180	2,7	- 1,5	- 1,9
BR Deutschland	14950	17134	16207	20,4	4,2	- 5,4
Elláda	733	631	629	0,8	- 3,0	- 0,3
España	5018	5046	4962	6,2	0,1	- 1,7
France	21521	20970	20378	25,6	- 0,7	- 2,8
Ireland	5614	6158	6265	7,9	2,4	1,7
Italia	8887	8087	7875	9,9	- 2,4	- 2,6
Luxembourg	210	205	202	0,3	- 0,4	- 1,5
Nederland	4692	4876	4794	6,0	0,8	- 1,7
Portugal	1340	1381	1345	1,7	0,3	- 2,1
United Kingdom	12077	11623	11605	14,6	- 0,8	- 0,2

**Supply balance — beef/veal**

**EUR 12**

	1 000 t <sup>(3)</sup>			% TAV	
	» 1987 «	1991	1992	» 1991 « » 1987 «	1992 1991
1	2	3	4	5	6
Gross internal production	7889	8705	8380	1,2	- 3,7
Net production	7962	8723	8396	1,0	- 3,8
Changes in stocks	x	258	212	x	- 17,8
Imports <sup>(1)</sup>	412	447	480	1,8	7,4
Exports <sup>(1)</sup>	912	1244	1239	4,5	- 0,5
Intra-Community trade <sup>(2)</sup>	1640	2035	2110	4,9	3,7
Internal use (total)	7557	7670	7425	- 0,6	- 3,2
Gross consumption (kg/head/year)	23,4	22,2	21,5	- 1,8	- 3,2
Self-sufficiency (%)	104,4	113,5	112,9	1,8	- 0,5

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

(<sup>1</sup>) Total trade, with the exception of live animals.

(<sup>2</sup>) All trade, including live animals (figures based on imports).

(<sup>3</sup>) Carcass weight.

(\*) Extract from "The agricultural situation in the Community. 1993 report".

Sheep and goat numbers (preceding December)

	1 000 head			% of EUR 12	% TAV	
	» 1987 «	1991	1992	1992	$\frac{» 1991 «}{» 1987 «}$	$\frac{1992}{1991}$
1	2	3	4	5	6	7
<i>Sheep</i>						
EUR 12	89023	100835	98365	100,0	2,7	-2,4
Belgique/België	128	136	129	0,1	0,8	-5,2
Danmark	65	111	122	0,1	14,1	9,9
BR Deutschland	1364	3240	2488	2,5	15,4	-23,2
Elláda	10612	10150	9837	10,0	-1,2	-3,1
España	19267	24022	24608	25,0	5,4	2,4
France	12140	11071	10640	10,8	-2,5	-3,9
Ireland	3759	5864	5988	6,1	11,7	2,1
Italia	11400	10848	10435	10,6	-1,0	-3,8
Luxembourg	5	7	6	0,0	7,5	-14,3
Nederland	1140	1880	1800	1,8	12,1	-4,3
Portugal	3012	3360	3380	3,4	2,8	0,6
United Kingdom	26130	30147	28932	29,4	3,2	-4,0
<i>Goats</i>						
EUR 12	11858	13050	12198	100,0	1,9	-6,5
Belgique/België	7	8	9	0,1	3,6	7,1
Danmark	0	0	0	0,0	x	x
BR Deutschland	46	90	83	0,7	13,7	-7,8
Elláda	6057	5918	5832	47,8	-0,7	-1,5
España	2656	3526	2799	22,9	5,8	-20,6
France	996	1162	1121	9,2	4,1	-3,5
Ireland	0	0	0	0,0	x	x
Italia	1192	1298	1314	10,8	1,9	1,2
Luxembourg	1	1	1	0,0	0,0	0,0
Nederland	45	77	73	0,6	13,0	-5,2
Portugal	803	857	862	7,1	1,7	0,6
United Kingdom	55	113	105	0,9	19,3	-7,1

Source : Eurostat.

Supply balance — sheepmeat and goatmeat

EUR 12

	1 000 t			% TAV	
	» 1987 «	1991	1992	$\frac{» 1991 «}{» 1987 «}$	$\frac{1992}{1991}$
1	2	3	4	5	6
Gross internal production	993	1221	1195	4,8	- 2,1
Imports — live animals <sup>(1)</sup>	21	22	19	1,2	- 11,5
Exports — live animals <sup>(1)</sup>	1	6	1	28,2	- 86,4
Intra-Community trade <sup>(1)</sup>	29	65	70	22,1	7,8
Net production	1007	1237	1213	5,1	- 0,1
Changes in stocks	- 9	:	:	x	x
Imports <sup>(2)</sup>	229	236	243	1,8	2,7
Exports <sup>(2)</sup>	5	13	5	12,0	- 64,6
Intra-Community trade <sup>(3)</sup>	114	164	195	10,8	19,0
Internal use	1222	1460	1450	4,5	- 0,7
Gross consumption (kg/head/year)	3,8	4,2	4,2	3,0	0,0
Self-sufficiency (%)	81,3	83,6	82,4	0,3	- 1,5

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

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

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

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

Pig numbers (December of previous year)

	1 000 head			% of EUR 12	% TAV	
	1987	1992	1993	1993	$\frac{1992}{1987}$	$\frac{1993}{1992}$
1	2	3	4	5	6	7
EUR 12	102071	101677	105078	100,0	-0,1	3,3
Belgique/België	5989	6533	7037	6,7	1,8	7,7
Danmark	9192	9767	10345	9,8	1,2	5,9
BR Deutschland	23480	21361	22058	21,0	-1,9	3,3
Elláda	1165	974	1099	1,0	-3,5	12,8
España	16507	17209	18219	17,3	0,8	5,9
France	11895	12068	12564	12,0	0,3	4,1
Ireland	967	1346	1423	1,4	6,8	5,7
Italia	9340	8549	8307	7,9	-1,8	-2,8
Luxembourg	74	64	66	0,1	-3,0	3,1
Nederland	14036	13727	13709	13,0	-0,4	-0,1
Portugal	2392	2560	2547	2,4	1,4	-0,5
United Kingdom	7832	7519	7704	7,3	-0,8	2,5

Source: Eurostat.

Supply balance — pigmeat

EUR 12

	1 000 t (1)			% TAV	
	1987	1991	1992	$\frac{1991}{1987}$	$\frac{1992}{1991}$
1	2	3	4	5	6
Gross internal production	12869	14333	14388	2,7	0,4
Imports — Live animals	33,6	6,9	1,6	-32,7	-76,8
Exports — Live animals	1,0	10,4	1,3	81,1	-87,5
Intra-Community trade	441	409	479	-1,9	17,1
Net production	12836	14336	14388	2,8	0,4
Changes in stocks	10	-36	0	x	x
Imports	84	41	59	-16,3	43,9
Exports	440	608	536	8,5	-11,8
Intra-Community trade	2101	2555	3007	5,0	17,7
Internal use	12510	13801	13911	2,5	0,8
Gross consumption in kg/head/year	38,7	40,0	40,2	0,9	0,5
Self-sufficiency (%)	102,6	103,9	103,4	0,3	-0,5

Source: Eurostat.

(1) Carcass weight.

Number of utility chicks of table strains hatched

	1 000 head				% TAV	
	» 1987 «	1990	1991	1992	$\frac{» 1991 «}{» 1987 «}$	$\frac{1992}{1991}$
1	2	3	4	5	6	7
EUR 12	3054790	3398164	3597518	3647201	5,7	1,4
BLEU/UEBL	91869	109746	114593	125634	7,6	9,6
Danmark	87458	99457	104808	114689	6,2	9,4
BR Deutschland	218993	237439	299596	322843	11,0	7,8
Elláda	68700	78011	80315	83954	5,3	4,5
España	498383	522127	543669	529396	3,3	-2,6
France	658344	804121	824012	843788	7,8	2,4
Ireland	38326	44109	48770	50025	8,4	2,6
Italia	373922	399571	413211	417739	3,4	1,1
Nederland	300876	323199	340826	336406	4,2	-1,3
Portugal	118109	110558	178340	171808	14,7	-3,7
United Kingdom	599815	669833	649378	650919	2,7	0,2

Source: Eurostat.

Supply balance — poultrymeat

EUR 12

	1 000 t (¹)				% TAV	
	» 1987 «	1990	1991	1992	$\frac{» 1991 «}{» 1987 «}$	$\frac{1992}{1991}$
1	2	3	4	5	6	7
Gross internal production	5784	6336	6755	6938	5,3	2,7
Imports — live birds	3	3	3	2	0,0	-33,3
Exports — live birds	7	3	2	1	-34,1	-50,0
Intra-Community trade	83	105	135	150	17,6	11,1
Net production	5780	6336	6756	6939	5,3	2,7
Changes in stocks	41	22	23	13	x	x
Imports	81	135	179	157	22,5	5,4
Exports	367	425	476	519	9,1	9,0
Intra-Community trade	467	678	791	905	19,2	14,4
Internal use (total)	5452	6024	6406	6564	5,5	2,5
Human consumption (kg/head/year)	16,8	18,6	18,6	19,1	3,5	2,6
Self-sufficiency (%)	106,1	105,2	105,4	105,7	-0,2	0,2

Source: Eurostat.

(¹) Slaughter weight.

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