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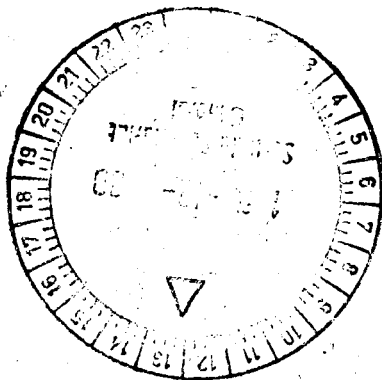
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COMMISSION OF THE EUROPEAN COMMUNITIES

COM(80) 830 final

Brussels, 4 December 1980



PROPOSAL FOR AN ESTIMATE OF SUPPLY
AND DEMAND FOR BEEF AND VEAL IN THE PROCESSING INDUSTRY
FOR THE PERIOD 1 JANUARY TO 31 DECEMBER 1981

PROPOSAL FOR AN
ESTIMATE

CONCERNING YOUNG MALE BOVINE ANIMALS WEIGHING 300 KGS OR LESS
AND INTENDED FOR FATTENING FOR THE PERIOD 1 JANUARY TO 31 DECEMBER 1981

(submitted to the Council by the Commission)

COM(80) 830 final

PROPOSAL FOR AN ESTIMATE OF SUPPLY
AND DEMAND FOR BEEF AND VEAL IN THE PROCESSING INDUSTRY
FOR THE PERIOD 1 JANUARY TO 31 DECEMBER 1981

MEMORANDUM

Set out below are the main points of view expressed at the bilateral consultative meetings held between representatives of the Argentine, Australian, Hungarian, New Zealand, Polish and Uruguayan governments and the Commission.

ARGENTINE

- The 1 000 000 tonnes of fresh beef available for processing was excessive and represented an increase of 13% compared with 1980.
- Estimated Community import requirements of 60 000 tons of beef for processing was considered too low in view of:
 - a) the enlargement of the Community by the accession of Greece and
 - b) the estimate of 11 000 tonnes of meat imported under GATT quota was far too high.
- From the information supplied by the Commission it was not possible to estimate the requirements of the processing industry.
- The Commission should take all measures necessary to ensure that the quantity established for the Balance Sheet is effectively imported. In particular the levy applicable to imports under system (b) should be abolished.
- Sales of beef from intervention should be carried out at a price level which will still allow imports.

AUSTRALIA

- Considered the main objective is to ensure that the undertakings given by the Community on the Balance Sheet in the Multilateral Trade Negotiations are fully implemented. In their view that had not been the case in 1980, the initial year of the operation of agreements negotiated in the Multilateral Trade Negotiations.
- They also considered the obligations under the exchange of letters had not been fully complied with in so far as there was not a detailed breakdown by each individual Member State as to each country's requirement of processing beef and quantity of suitable beef available from home production.

- The 1 000 000 tonnes of fresh beef available for processing was excessive in view of:
 - a) reduction in overall Community production
 - b) enlargement of the Community by accession of Greece
 - c) tonnage used for processing from GATT quota imports too high
- They accepted the Community requirements for 1981 as 60 000 tonnes on the basis that the Community undertook to ensure that real import possibilities were achieved for the 60 000 tonnes especially with regard to the beef imported under "system (b)".
- They consider that, in addition to estimating a level for imports based on a realistic demand for imported beef for processing in all Member States, the Commission should administer the Balance Sheet in a manner consistent with the import quantity established under the Balance Sheet in order to permit access for the full quantity of imports established.

HUNGARY

- The export of frozen manufacturing beef did not form part of their export programme in 1981.

NEW ZEALAND

- Considered statistical information provided was inadequate.
- Whilst they only export prime frozen beef to the Community they considered the estimated import requirements of beef for processing of 60 000 tonnes too low due to:
 - a) no provision for enlargement of the Community by accession of Greece
 - b) the estimate of 11 000 tonnes of beef imported under the GATT quota was too high.
- The estimate of a 13% increase in the supply of fresh Community meat for manufacturing seems unduly high.
- The levy of 45% on the imports under system (b) has made imported beef unattractive and uncompetitive, particularly in view of the price at which the Community beef from intervention stocks has been made available.

POLAND

- The export of frozen manufacturing beef does not form part of their export programme in 1981.

URUGUAY

- Considered the estimate of Community import requirements of 60 000 tonnes of beef for processing was too low in view of:
 - a) reduction in overall Community production
 - b) no increase in imports to cover the enlargement of the Community by the accession of Greece
 - c) tonnage of 11 000 tonnes of beef imported under GATT quota is too high.

Proposed

Estimate of supply and demand for beef and veal in the processing
industry for the period 1 January to 31 December 1981

THE COUNCIL OF THE EUROPEAN COMMUNITIES,

Having regard to the Treaty establishing the European Economic Community,

Having regard to Council Regulation (EEC) No 805/68 of 27 June 1968 on the common organization of the market in beef and veal⁽¹⁾, as last amended by Regulation (EEC) No 2966/80⁽²⁾, and in particular Article 14(2) thereof,

Having regard to the proposal from the Commission,

HAS ADOPTED THIS ESTIMATE:

Foreword

Article 14(2) of Regulation (EEC) No 805/68 provides that each year before 1 December, the Council, acting by a qualified majority on a proposal from the Commission, shall draw up an estimate of meat which may be imported under the arrangements laid down in that Article. This estimate shall take account, on the one hand, of the expected Community supplies of meat of a quality and type of cut suitable for industrial use and, on the other, of industrial need.

This estimate shall mention separately the qualities of meat

- (a) intended for the manufacture of preserved food which does not contain characteristic components other than beef and jelly;
- (b) intended for the processing industry for the manufacture of products other than preserved food referred to in (a).

(1) OJ No L 148, 28. 6.1968, p. 24.

(2) OJ No L 307, 18.11.1980, p. 5

Introduction

1. In the establishment of the level of imports in the Balance Sheets of beef for processing put forward for the years following 1980, the balance sheet will be drawn up and administered by the Commission in conformity with the Commitment assumed by the Community in the GATT exchange of letters in such a way as to ensure the regular supply of the Community market and permit an increase in imports in proportion to the increase in Community consumption taking into account the foreseeable expansion of the market, and with the expectation that the annual level of imports of frozen beef for the processing industry under the balance sheet will increase, year by year, in proportion to the increase in Community consumption, over the current level of imports at the time of the 1979 exchange of letters.

2. The annual presentation of the draft Balance Sheets will be preceded by consultations between the Commission and certain third countries. The objectives of these meetings will be to have an exchange of views on the whole situation of the beef market in the EEC and in third countries as well as the forecasts of production and consumption, to proceed with an analysis by both sides of the elements which would help to establish the estimates of Community needs for frozen beef for processing and to exchange information concerning export possibilities.

Consultations were undertaken by the Commission with representatives of the Argentine, Australian, Hungarian, New Zealand, Polish, and Uruguayan governments.

This estimate covers the period 1 January to 31 December 1981. It has been prepared in the light of information available to the Commission and on the basis of current forecasts. It is derived from estimates of demand in the industry and of Community supplies of meat of qualities and types of cut suitable for industrial use, hereinafter referred to as "meat for processing".

Demand in the industry for meat for processing has been assessed by the reference to the quantities of fresh and frozen meat used each year.

Community supplies of meat for processing have been estimated by reference to the quantities of fresh and frozen meat normally used for this purpose.

Chapter I

Supplies of meat for processing

According to information supplied to the Commission by the Member States in September 1980, Community supplies of home-produced fresh meat for processing for 1981 can be estimated at 1 000 000 tonnes of meat on the bone.

It is also estimated that at the end of 1980 the Community will hold a public stock of meat as a result of standing intervention purchases. The quantity of this meat satisfying the requirements of meat for processing can be estimated at 70 000 tonnes of meat on the bone.

With effect from January 1981 the Community is to open a tariff quota for 50 000 tonnes of boned frozen meat, which corresponds to 65 000 tonnes of meat on the bone.

Experience shows that under this quota 11 000 tonnes of frozen meat on the bone will be imported in 1981 for processing.

In 1981 the quantity of meat to be imported into the Community and originating from Botswana, Kenya, Madagascar or Swaziland which satisfies the requirements for processing is estimated at 4 000 tonnes of meat on the bone.

For 1981 the total available supplies suitable for processing will thus be as follows:

Fresh meat:	1 000 000 tonnes
Frozen meat taken over at intervention:	70 000 tonnes
Frozen meat imported under GATT quota:	11 000 tonnes
Frozen meat imported under A.C.P. agreement:	4 000 tonnes
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	1 085 000 tonnes
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Chapter II

Industrial demand for meat for processing

According to information supplied to the Commission by the Member States in September 1980, Community demand for meat for processing in 1981 can be estimated at 1 145 000 tonnes of meat on the bone. This figure includes quantities required for the preparation of preserved foods as specified in Article 14(1)(a) of Regulation (EEC) No 805/68. This latter quantity is estimated at 118 000 tonnes.

Conclusion

The needs of the processing industries, including those producing preserved foods referred to in Chapter II and containing no characteristic components other than beef and jelly, have been estimated at 1 145 000 tonnes of meat on the bone.

The tonnage of the supplies available from the total of home production in 1981, plus stocks in store at the end of 1980 suitable for processing and imports under the different special arrangements suitable for processing has been estimated at 1 085 000 tonnes of meat on the bone.

The deficit in meat for processing in 1981 can be estimated at 60 000 tonnes of meat on the bone.

It is proposed to apportion this tonnage, as required by Article 14(1) of Regulation (EEC) No 805/68, so that:

- (a) 30 000 tonnes of meat intended for the manufacture of preserved food which does not contain characteristic components other than beef and jelly shall qualify for the total suspension of the levy, and
- (b) 30 000 tonnes of meat intended for the processing industry for the manufacture of products other than the preserved food referred to in (a) shall qualify for the total or partial suspension of the levy.

ESTIMATE PROPOSAL

CONCERNING YOUNG MALE BOVINE ANIMALS WEIGHING 300 KGS OR LESS

AND INTENDED FOR FATTENING FOR THE PERIOD 1 JANUARY TO 31 DECEMBER 1981

MEMORANDUM

In accordance with the undertakings made within the Multilateral Tariff Negotiations, the Commission held bilateral consultations with Yugoslavia, Hungary and Poland on the estimate concerning young male bovine animals intended for fattening for 1981; the results are as follows :

1. The Yugoslavian representatives informed the Commission that that country had up to 100 000 head of young cattle available for export in 1981. In these circumstances, Yugoslavia requested an increase in the quantity from 48 000 head fixed for 1980 to 70 000 head for 1981, on the usual terms, namely a 70 % reduction in the levy.
 2. The Hungarian representatives disclosed that some 15-20 000 head of unfattened animals were available for export.
 3. The Polish representatives stated that, on account of the shortage of fodder in Poland, the availability of young cattle for export would increase in 1981. A figure of about 200 000 head was forecast for export. Poland showed an interest in an increased level of exports within the estimate. Furthermore, it was hoped that the present rate of levy (40 %) could be lowered.
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PROPOSAL

Estimate concerning young male bovine animals weighing 300 kgs or less and intended for fattening for the period 1 January to 31 December 1981

THE COUNCIL OF THE EUROPEAN COMMUNITIES,

Having regard to the Treaty establishing the European Economic Community,

Having regard to Council Regulation (EEC) No 805/68 of 27 June 1968 on the common organization of the market in beef and veal¹, as last amended by Regulation (EEC) No 2916/79², and in particular Article 13 thereof,

Having regard to the proposal from the Commission,

HAS ADOPTED THIS ESTIMATE:

PRELIMINARY REMARK

Article 13(2) of Regulation (EEC) No 805/68 provides that the Council shall, each year before 1 December, draw up on a proposal from the Commission and by qualified majority vote, an estimate of the young male bovine animals which may be imported under the system laid down under the said Article. This estimate is to take account both of the forecast supplies of young bovine animals intended for fattening within the Community and of Community breeders' requirements.

In order to establish the volume of imports to be carried out under this estimate as from 1981, in accordance with the Community's undertaking within GATT, consultations are held between the Commission and representatives of some non-member countries before the annual draft estimate is put forward.

¹ OJ No L 148, 28.6.1968, p. 24

² OJ No L 329, 24.12.1979, p. 15

INTRODUCTION

Before drawing up this estimate, the Commission held consultations with representatives of the following non-member countries: Hungary, Poland, Yugoslavia.

These consultations included an exchange of views on the beef and veal market as a whole, the production and consumption prospects within the Community and on the scope for exports of young male bovine animals by non-member countries.

This estimate relates to the period 1 January to 31 December 1981. It has been prepared in the light of information available to the Commission and on the foreseeable trend for 1981 of supplies of and requirements for young male bovine animals intended for fattening in the Community.

CHAPTER I

Assessment of Community supplies for 1981

In view of the number of breeding females (cows and heifers) anticipated for 1981 (about 35,897,000), some 28,340,000 births of calves are expected during that year. Production over the year of male calves would therefore be about 14,170,000 head.

CHAPTER II

Estimated Community requirements for 1981

The number of slaughterings of male calves envisaged for 1981, on the basis of data collected from Member States, should be about 3,600,000 head.

The number of male animals intended for breeding should be about 750,000 head.

2. In the light of information provided by Member States and of past experience, it is expected that in 1981 the requirements of community breeders for young male bovine animals for fattening will be 10,055,000 head, including animals lost and animals put to pasture.

3. The considerations set out in point 1 and 2 suggest that the Community's overall requirements for male calves will be 14,405,000 head in 1981.

These requirements will only be partly satisfied by Community supplies of these animals which, as shown in Chapter I, amount to about 14,170,000 head.

The foreseeable Community shortfall in 1981 for male calves for fattening will therefore be around 235,000 head.

CONCLUSION

On the basis of these considerations, the estimate for young male bovine animals intended for fattening which may be imported in 1981 under the arrangements provided for in Article 13 of Regulation (EEC) No 805/68 is fixed at 235,000 head.

Done at Brussels,

For the Council

