Egyptian Red Meat Import Policy
with Emphasis on the Role of Private Sector

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WITH EMPHASIS ON THE ROLE OF THE PRIVATE SECTOR

CHARACTERISTICS OF THE RED MEAT IMPORT MARKET

Role of Red Meat Imports in Total Consumption

Prior to 1975 red meat imports were 5% to 10% of total red meat consumption. Between 1975 and 1982, the share increased to 20% to 25%. However, there was a big jump in the share of total consumption from red meat imports during the last half of the decade, 1985-1988. Table 1 shows that the share ranged between one-third in 1988 to 42% in 1987.

Table 1— Red Meat Production, Imports and Consumption,

Egypt, 1985-88

ITEM	1985	1986	1987	1988
Total Consumption of which:	543	574	620	522
Domestic production (000) tons	331	363	358	345
Imports (000) tons	212	211	262	177
% of total consumption	39	37	42	34

Trends in Imports and Domestic Production of Red Meat

Red meat imports averaged 20,000 to 30,000 tons a year until 1975. The quantity jumped several fold during the last half of the 1970s and reached 129,000 tons in 1981. Imports continued to climb and reached a maximum in 1987 of 262,000 tons. They dropped to 177,000 tons in 1988, approximately the quantity imported in 1982 (180,000 tons). The question is why was there such a drop in the importation of red meat in 1988? Was it because of the market saturation for imported red meat or because of shortage in foreign currency, or the rise in the exchange rate or some other constraint? This analysis provides some of the answers.

The historical trend of domestic red meat production stagnated from 1964 through 1988, except for the small expansion due to the fattening of buffalo veal, a project initiated by the public sector in 1969. This project faced obstacles in some years which stopped the growing trend and in other years it succeeded in adding thousands of tons to the local red meat supply. Over two and a half decades, local production fluctuated around 330,000 tons. Fluctuations in domestic red meat supply, other than buffalo veal, were affected by the density of livestock inventory in berseem areas and available concentrates, which determine the off-take rate annually. It should, also, be mentioned that fed cattle bulls (2-3 years old) is the main type of red meat in Egypt which represents about one-half of the domestic production.

The conclusion is that the recent expansion in total red meat consumption was mainly due to expansion in red meat imports, rather than domestic production.

Role of Private Sector in Red Meat Imports

In 1982, the private sector direct participation in the importation of red meat was only 15% (monetary term). The remainder was imported for the Ministry of supply.

Although the legislation since 1977 has not imposed any restrictions on imports of red meat by the private sector, the government has announced in the most recent years that the corresponding authorities have relaxed all remaining constraints that might limit the role of the private sector as importer or trader of red meat.

No direct source provides an explicit value of the red meat imported by the private sector. Instead, this figure was estimated implicitly, by subtracting the governmental imported quantity, obtained from the Ministry of supply, from the total quantity imported published by the Central Department of Quarantine. Table 2 presents the percentage share of the private sector of the total quantity of red meat imported from 1985 through 1988.

Table 2— Share of Private Sector in Imported
Red Meat (1985-1988)

YEAR	FROZEN RED MEAT	LIVE ANIMALS
	%	%
1985	56	0
1986	81	70
1987	94	90
1988	82	84

Generally, the share of the private sector in imported red meat raised significantly over the last half of this decade. The private sector became the dominant importer of red meat, either as frozen meat or live animals. This empirical evidence supported the success of policy announcements by governmental authorities which encouraged the dominant role of the private sector in the importation of red meat even though its role declined slightly in 1988.

Type of Imported Red Meat

Table 3 show that during 1985 through 1988 frozen beef was the bulk of total imported red meat, particularly if imported frozen liver was added to frozen meat (liver is sold at the same price as beef). Among live animals imported, camels were the major type. The share of frozen meat (including liver) raised from 63% in 1985 to 73% in 1986 to 80% in 1987 but dropped to 68% in 1988.

Important changes in 1988 were the drop in total quantity of red meat imported, the reduced share of red meat imports by the private sector and the reduction in frozen meat as a share of total red meat imports. Frozen beef is the least expensive type of imported meat.

Table 3— Types of Imported Red Meat,

Egypt, 1985-1988

ITEM	1985	1986	1987	1988
	------- 1,000 Metric Tons ---------			
Frozen beef	115	131	202	96
Liver	20	25	22	26
Chilled beef	8	0	0	1/
Preserved beef	0	15	9	10
Live animals:	69	40	29	45
Cattle	21	16	12	11
Sheep	1/	0	2	1/
Camels	49	24	15	34
Total Imported Red Meat	212	211	262	177

1/ Less than 200 metric tons.

Red Meat,

	1987	1988
--- metric Tons ---		
	262	96
	23	26
	0	1/
	9	10
	29	45
	11	11
	8	1/
	15	34
		177

Export Markets for Red Meat

All imported camels are from Sudan. However, live cattle are imported from either African or European countries. The share of European countries increased at the expense of the African countries. Within European countries, the Eastern Europe share is dominant (Table 4). With respect to frozen meat, EEC and Ireland are the two major export markets. However, EEC is the preferred one.

The question is: does the preference of a given market coincide with the CIF price?, i.e. the higher the share of a given market, the lower is the CIF price. From Table 4, this import policy rationale is more clear with live cattle than with frozen meat. Because frozen meat is mainly imported from EEC or even Ireland, agreements with EEC tend to result in the terms of trade to be for EEC countries. In contrast, the live cattle market is under free market regulations to a greater extent.

Table 4 -- Red Meat Imports by Export Market and CIF Price

(1985-1987)

ITEM	1985		1986		1987	
	% Share of Each Source	CIF 1/ Price	% Share of Each Source	CIF Price	% Share of Each Source	CIF Price
Frozen Meat:						
EEC	44	1177	0	-	23	1160
N. Zeland	31	1430	75	1127	77	1223
Others	24	3628	25	1018	-	-
Live Cattle:						
Sudan	18	1610	12	1752	-	-
Somalia	36	1095	29	922	27	922
N. Zeland	32	1000	17	922	21	1182
Eastern Europe	15	939	42	883	52	916

1/ CIF price is US dollars/ton for frozen meat and US $/head for cattle.

Source: General Authority for Commodity Supplies

SEASONAL INDEX OF RED MEAT SUPPLY

The study used time series analysis to derive a monthly seasonal index for each type of red meat supply in Egypt over the period 1985-1988. The following model was used:

$$Y_{jtcsi} = T_j C_j S_j I_j$$

Where Y_{jtcsi} = the quantity of red meat type j in the year t, and the stage of the cycle c and in the season (month) s of the observation i.

T = time trend effect (annual)

C = cyclical effect

S = seasonal effect

I = irregular movement

The cyclical effect was omitted from this model because the period was very short (4 years). The annual trend was calculated from the estimated time trend equation's in table ( ). The original observations of red meat quantities were adjusted for the trend effect using estimated values of Y, i.e. (Y) from the equations in table ( ). The adjusted values were used to calculate the seasonal index using the arithmetic mean method.

Table ( ) shows the derived seasonal index for each meat type. The indices were presented by illustrative figures (1) - ( ). The purpose of estimating the seasonal index was to identify if any regular pattern of meat supply could by detected by each type. Such pattern, if any, would be matched with the known feed supply pattern in Egypt for domestic meat production and the seasonal demand peaks for both domestic meat and imported meat. If any pattern was detected it would be a measure of the efficiency of the marketing system with respect to its consistency and regularity over a year. Also the consistency between the domestic versus imported red meat delivery to the market was observed.

Seasonal Index of the Supply of the Cattle and Buffalo Meat Production

The berseem availability plays a dominant role in buffalo and cattle off-take rate for slaughter. The season extends from mid-October to May each year. It is the bulk of the feed supply in Egypt. Therefore, by the end of production for the season berseem the highest peach of the supply of such meat was observed - ( ), i.e. the supply was 6-10% above the monthly average. Some farmers cultivate summer green feeder crops which expands the green fodder availability two months beyond May. Therefore, a second peak was observed in July, i.e. 8.2% above the monthly average. A third peak but much lower than that one in either May or

...ly was observed in January, i.e. 3% above the monthly average. January is within the long season berseem and also it is the time of the short season berseem (two months) before the cultivation of cotton. The cotton is planted in February through mid-March. Since farmers require time to prepare their land for cotton seeding, they obtain only one cutting from the short season berseem (mainly ends by January). Accordingly, a batch of feeder calves are sent for slaughter. However, as mentioned earlier, January is the third month of the long season berseem. Farmers wait to obtain calves from their dairy cows and then they cull the low producing cows. The calving season is concentrated within the first 2 months of the long-season berseem (75% of calvings). Accordingly the peak of the off-take of culled cows is in January.

However, except for May and July, there is a homogeneity in the supply index throughout the year. This is probably due to the current fatting feedlot system that depends upon the concentrate feed distribution policy. Currently, the common fattening system requires about 4 months (3 lots a year).

With respect to the seasonal demand effect (higher price), it should be mentioned that there are two main seasons (periods) when the demand for red meat increased significantly. These are: 1) Ramadan; and 2) El-Adha feast (Eid Kebeer). These occasions are Islamic religious seasons. They follow the islamic moon year. Therefore,

their schedule is movable along the calendar year. During the studied period (1985-1988), Ramadan came within May while Al-Adha came within July in 1988 and within August in 1985-1987. During 1985-88, the seasonal peaks of the domestic cattle and buffalo meat delivery to the market were in May and July. Accordingly, these peaks were also partially price oriented because of the seasonal demand increase.

Seasonal Index of the Domestically Produced Sheep and Goats

Investigating table ( ), it seems that the domestic sheep market is mainly a seasonal demand oriented model, because the slaughter of sheep and goats is very large during the Al-Adha feast which existed over 1985-1988 within July-August. In July and August, the domestic mutton meat slaughter was 27.8% and 27.4% respectively, above the month average.

However, the domestic mutton production is partially, controlled by the long season berseem. The second peak of supply was in May, i.e. 8.2% above the monthly average.

Seasonal Index of Imported Live Camels

All camels slaughtered domestically are imported. They are imported from Sudan. The rainy season in Sudan is summer. The camels are

kept for grazing on ranges during summer and fall (May - Oct). The off-take for slaughter is during winter and spring (November - April). Table ( ) shows that over this period (November - April) number of imported camels was between 12% to 33% above the monthly average.

Importation of camels from Sudan is a very old historical trend. Traders have acquired experience with the domestic (Egyptian) market performance. They know that the minimum supply of domestic meat is at the beginning of the long season berseem (November). Therefore, they try to concentrate the number of camels delivered to the Egyptian market within this period. The imported camels in November were 20% above the monthly average.

A special type of imported camel is delivered to the market called spring-camels. They are delivered to the market in March and April (during the spring). They provide premium quality camel meat (1-1.5 years old). They are either imported very young or purchased as domestic newly borne camels and are raised on berseem and are sold as yearly camels. Their meat when included in combination with mutton of the minced meat of sheesh cabab is the best quality of sheesh cabab.

Seasonal Index of Imported Sheep

Table ( ), clearly, shows that the bulk of imported live sheep is concentrated within the period of Al-Adha feast, i.e. July - August. In July, the quantity imported was 629% of the monthly average. Importers insist on importing them one month or a few weeks before slaughter to feed them on grain to improve the quality of meat. The consumer sometimes prefers to slaughter them at home. Then, he purchases the lambs a few weeks earlier (before Al-Adha). Accordingly, even though that Al-Adha days occurred three times in August and only once in July over the 1985-1988 all lambs were imported for such occasions in July.

Seasonal Index of Imported Live Cattle and Frozen Meat

Table ( ) shows that there is no identified pattern of seasonal demand for imported live cattle and frozen meat or as a substitute for domestic meat supply. It is an irregular importation movement during the year. However, it could noticed that during the religious occasion period (May-August) the quantity imported of both types was much higher than the average.

Some reasons (constraints) could be raised:

1. Availability of funds in hard currency to finance the imported batches either by the public sector or private sector.

2. The fiscal year ends in June and begins in July. The public sector authority usually tries to spend the quota of foreign currency allocated for importation within these months, otherwise the reminder will be returned to the government.

3. Delay in the approval to deliver the imported batches to the domestic market by the private sectors, due to procedures imposed by the government.

Conclusions

In the short run, the red meat quantity in the market has the following seasonal pattern by type:

1. Whereas the domestic cattle and buffalo meat in the market is mainly determined by the green fodder supply and partially by the seasonal demand (Al-Adha period), the domestic sheep meat supply is mainly determined by the seasonal demand (Al-Adha period).

I.   Whereas, both imported live camels and mutton have an explainable seasonal pattern, both imported live cattle and frozen meat have irregular unexplainable seasonal patterns.

II. Whereas the seasonality of imported live camels is mainly controlled by the rain-season in Sudan and partially by the availability of domestic meat in the Egyptian market, the seasonality of the imported live sheep is entirely controlled by Al-Adha period.

III. Because imported cattle meat (either live animals or frozen) is the main imported type and its seasonal delivery to the Egyptian market has not shown any pattern of consistency with the domestic supply as a substitutes, it is expected that the imported red-meat marketing policy in the short run would not have a significant effect on the consumer red meat price level. A planned marketing policy for the imported red meat (beyond the quality constraint) is required.

Table 5 - SEASONAL INDICES FOR RED MEAT SUPPLY ...

(1985- 1990)

| MONTH | DOMESTIC PRODUCTION | | IMPORTED AND LOCAL | | | |
| | COW & | | LIVE ANIMALS | | | |
	BUFFALO	SHEEP	CATTLE	CATTLES	...	...
...	101.30	90.43	45.57	73.11	...	...
...	33.21	36.45	118.04	...75	...	...
...	72.50	...	105.43	112...	...	...
...	...90	37.46	83.13	...75	...	...
...	...27	66.00	50.18	112...	...	...
...	101.0.	93.94	70.97	...	...	...
...	101.8.	100.10	55.33	...95	...	...
...	110.5.	108.22	90.51	104.92	...	...
...	101.04	99.99	111.86	84.49	...	...
...	108.13	127.27	39.68	...87	...	...
...	102.00	127.06	142.35	71.54	...	...
...	90.22	34.05	165.73	84.59	...	...
...	100	100	100	100	100	...

Source: Calculated from:

1. Isolation of the time trend ...

2. Tables ( ), ( ), ( ) ...

$$(1985 - 1988)$$

Type of Red Meat	Time Trend Equation	R^2
Imported Live Cattle	$Y = 64828.0 - 7378.3\ T_j$ (4626.40)	0.78
Imported Frozen Red Meat	$Y = 126397.096 + 4150.8\ T_j$ (46122.12)	0.011
Domestic Produced Cattle & Buffalo meat	$Y = 33305.55 + 406.7\ T_j$ (1994.2)	0.2
Imported Live Sheep	$Y = -4840.5 + 11439.6\ T_j$ (36607.2)	0.119
Domestic Sheep	$Y = 514372.5 - 24809.5\ T_j$ (1575.616)	0.996
Imported Live Camels	$Y = 195577 - 34045.3\ T_j$ $(20657.3$	0.58

Value in paranthes represent the S_E of Estimated Coefficient where

$\hat{Y}$ = estimated quantity or no. of red meat type in year

T_j = Time trend in year j where $j = 0, 1, 2$ and 3

FIG ( )

SEASONAL INDICES OF DOMESTIC PRODUCED CATTLE

BUFFALO MEAT (1985- 1988)

Source: Table ( ) Annex

FIG ( )
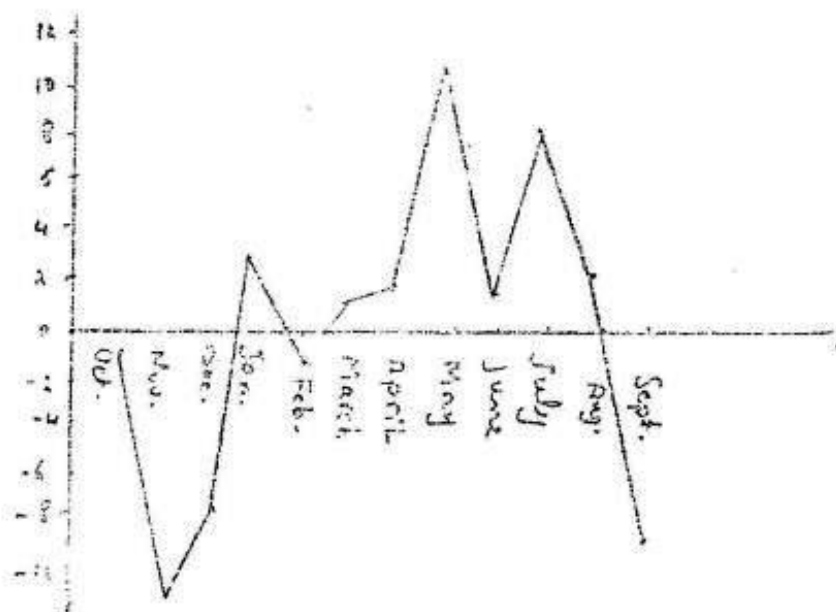
SEASONAL INDICES OF DOMESTIC PRODUCED MUTTON

(1985- 1988)

Source: Table (3) Annex
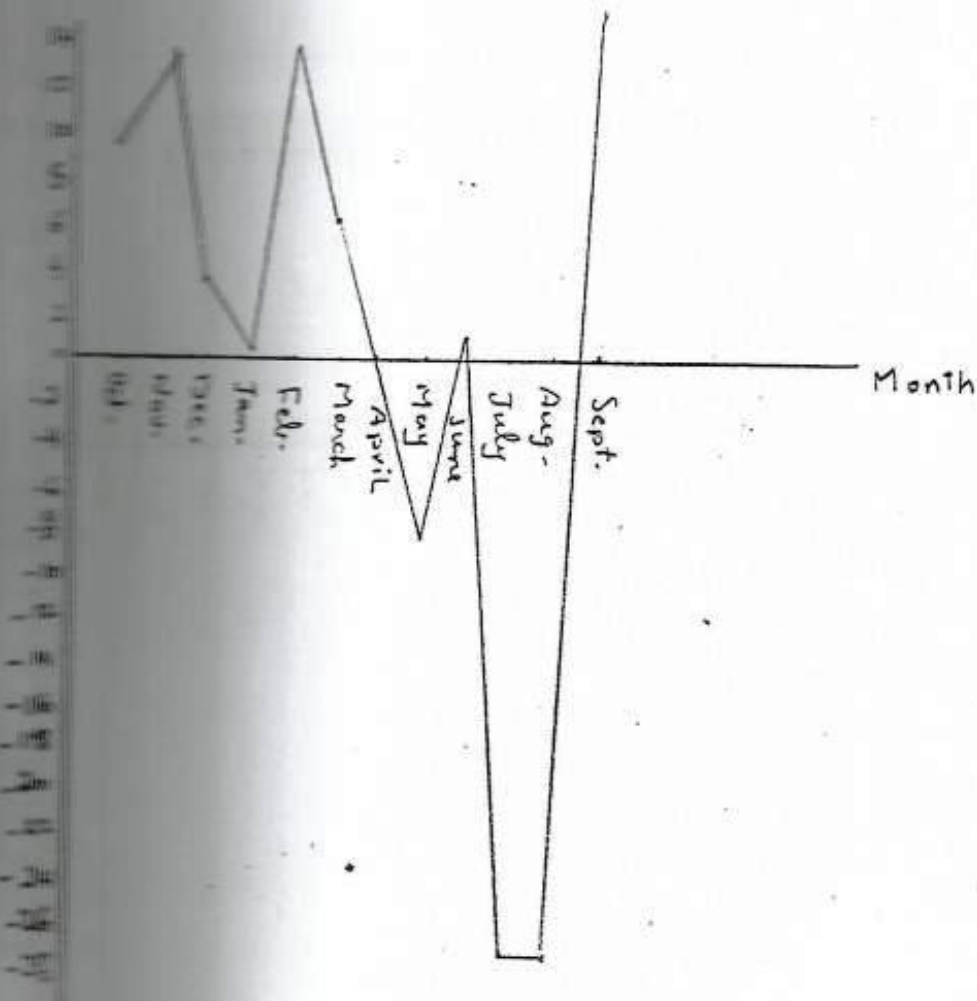
SEASONAL INDICES OF IMPORTED LIVE CATTLE

(1985- 1988)

Source: Table ( ) Annex

FIG ( )
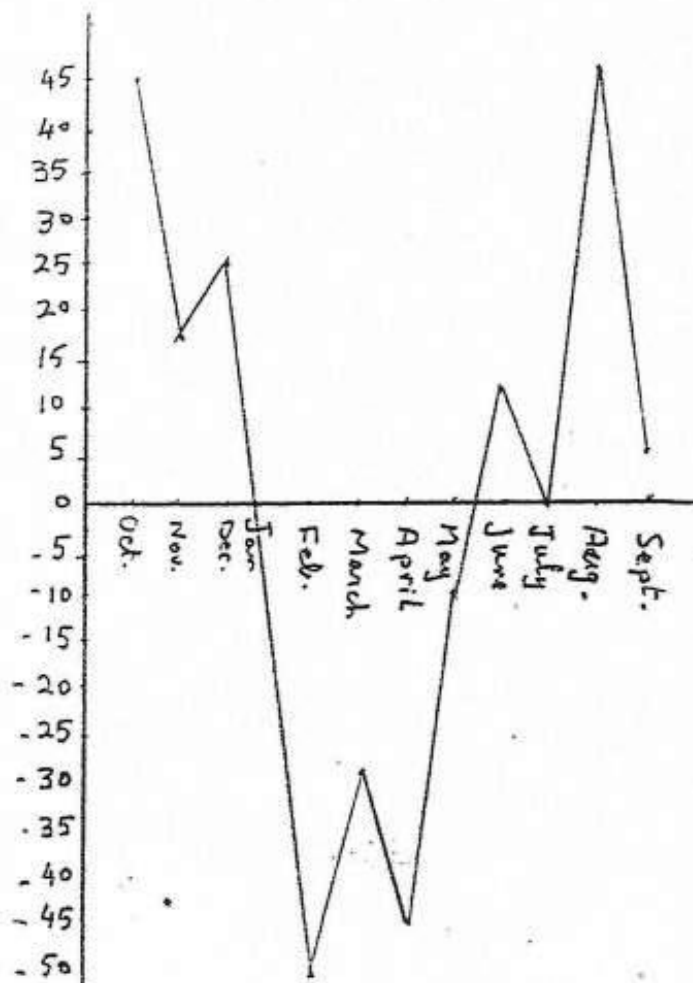
SEASONAL INDICES OF EXPORTED LIVE CAMELS

(1985- 1988)

Source: Table (4) Annex

FIG ( )
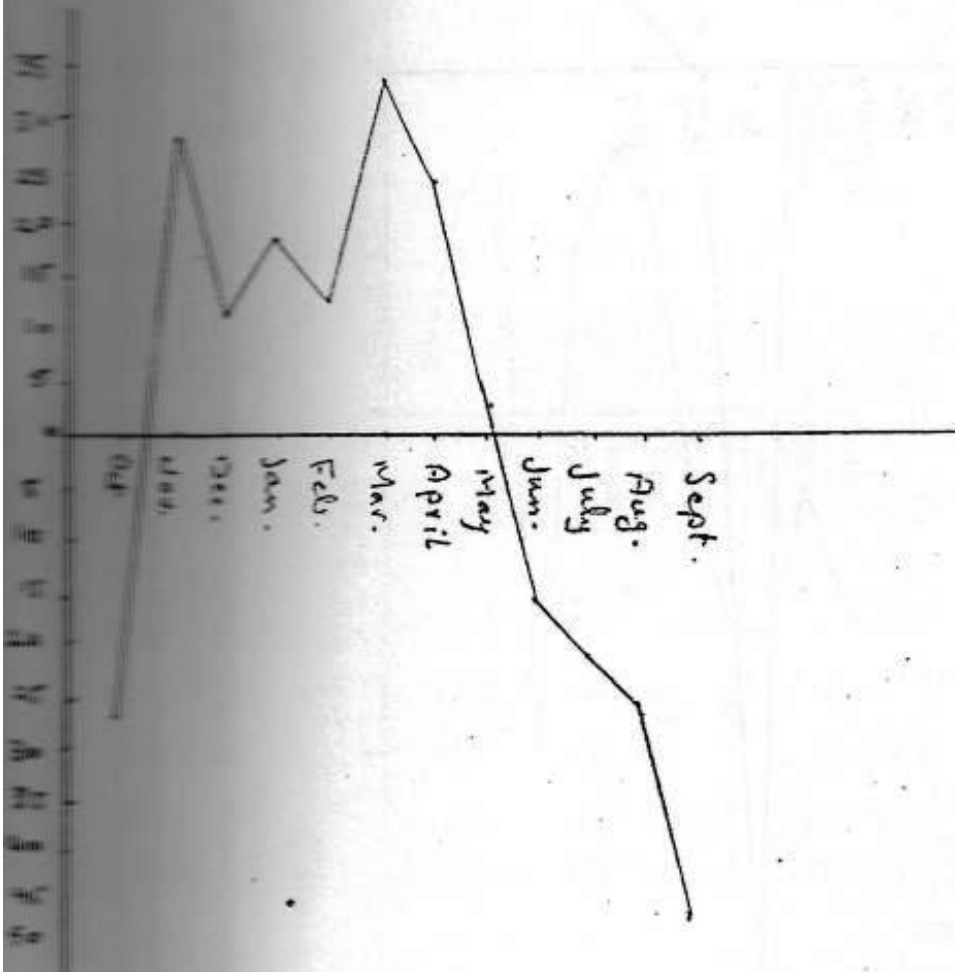
SEASONAL INDICES OF IMPORTED LIVE SHEEP

(1985- 1988)
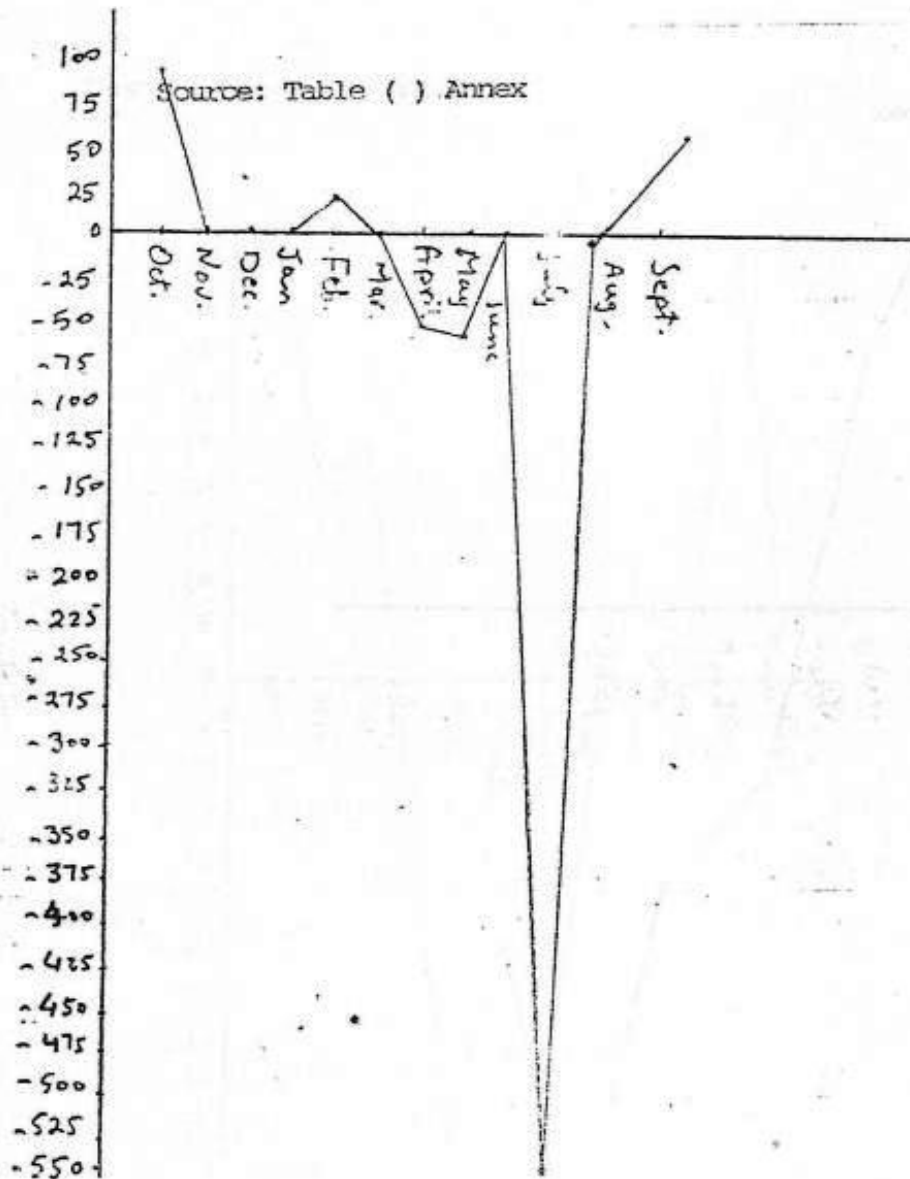
Source: Table ( ) Annex

SEASONAL INDICES OF IMPORTED FROZEN RED MEAT

(1985- 1988)

Source: Table ( ) Annex

Nov. Dec. Jan. Feb. March. April May. June July Aug. Sept.

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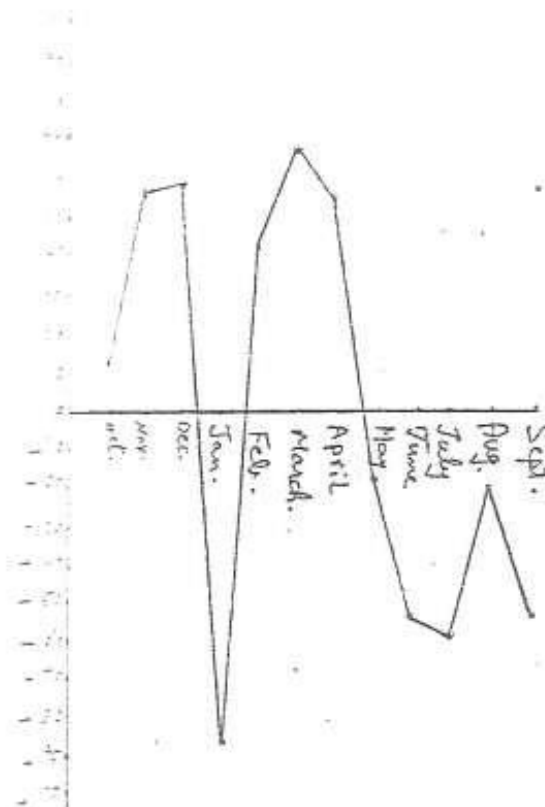
CONSTRAINTS AND OBSTACLES THAT LIMIT EXPANSION

OF RED MEAT IMPORTS BY THE PRIVATE SECTOR

Generally, the quantity of red meat imported in the last half of the eighties was much higher than the early years of the decade. Also, private sector share of imports were more than 85% during the second half of the decade in comparison with only 15% in 1981. In the seventies and early in the eighties, the limited quantity imported by the private sector was for special demand, i.e. for restaurants, hotels and similar kinds of retailers. Currently, imported red meat is available to all urban consumers and partially to rural consumers.

In 1988, two changes occurred in the importing of red meat. There was a sudden drop in the total quantity imported in 1988 to about 176,000 tons while it reached 262,000 tons in 1987. Also, the role of the private sector dropped, while the role of the public sector raised. With respect to the public sector, its share raised from 16,100 tons in 1987 to 31,300 tons in 1988. The private sector imported 245,500 tons in 1987. This quantity dropped to only 145,400 tons in 1988. The major shrinkage in private sector share of imports was in frozen meat which is the cheapest type of meat. In 1987 the frozen meat imported by the private sector was 219,900 tons but it developed to 107,500 tons in 1988. The private sector

▓▓▓▓▓▓▓▓ ▓▓▓▓ ▓▓▓▓ as live animals in 1988 compared with 1987, i.e. ▓▓▓▓▓ ▓▓▓ ▓ ▓▓▓▓ and 25,600 tons in 1987.

▓ ▓▓▓▓▓▓▓▓▓▓ analysis might conclude that the drop in the private ▓▓▓▓▓ ▓▓▓▓ of red meat imports in 1988 was an occasional ▓▓▓▓▓▓▓▓▓▓ which was derived from the current stagnation in the ▓▓▓▓▓▓ economy. However, the author believes that there are ▓▓▓▓▓▓ sets of constraints that may have limited the share of ▓▓▓▓▓▓ sector in red meat imports, particularly frozen meat. One ▓▓▓ ▓▓▓▓ the demand and the other limits the supply.

▓▓▓▓▓▓▓ Demand for Imported Frozen Red Meat

▓▓▓▓ ▓▓▓▓▓▓ evidences confirm this issue. This study summarizes ▓▓▓ ▓▓▓▓▓▓ that are interrelated.

— The estimated demand function for red meat by types (6 types) ▓▓▓▓▓ that the frozen imported red meat is a substitute only ▓▓▓ aged culled cows and buffaloes (20% of total consumption) — one percent increase in imported frozen red meat causes only ▓ ▓ percent decrease in the domestic meat consumption from ▓▓▓▓ culled cows and buffaloes (low quantity type of meat) at ▓▓▓▓▓ level. The substitutability of the common good quality ▓▓▓ meat type, i.e. domestic red bulls (beef) for the frozen imported red meat is nil.

2. The estimated weighted average of income elasticity of imported frozen red meat is 0.3 while it is more than one for domestic fresh meat. One percent growth in the real per capita income leads to an equivalent increase in domestic red meat consumption, while it leads only to 0.3% increase in imported frozen red meat consumption. Among income classes, Table 9 shows that the proportion of the population that consider the imported frozen red meat as a complete substitute for domestic red meat has decreased over time while the proportion of the population that considered the imported frozen red meat as an inferior good has increased over time. This performance is mainly due to poor physical marketing efficiency and a perception of quality of imported red meat in the consumer's mind from past experience (as discussed in the following sections).

Table 6— Income Elasticity of Demand for Imported Frozen Meat
Among Population Classes Over Time 1/

INCOME ELASTICITY OF IMPORTED FROZEN RED MEAT	SUBSTITUTABILITY FOR DOMESTIC FRESH RED MEAT	POPULATION PROPORTION		
		1964	1975	1981
		Percent		
$E \geq 1$	Full Substitute	42	39	0.0
$0 < E < 1$	Restricted Substitute	44	45	44
$E < 0$	Non Substitute	15	16	56

1/ E = Income elasticity. Income elasticity of demand for domestic fresh red meat equals one for all income classes.

II. Lack of Efficient Marketing Services

A cumulative deterioration in the frozen meat quality occurs during the retail marketing phase. Deterioration in its quality decreases the demand volume. Among those poor services are:

a)   Lack of efficient port handling facilities;

b)   Transportation facilities for loading frozen meat are inadequate and/or storage is inefficient;

c)   Packing and processing plants are poor and inadequate;

d)   Retail storage facilities are poor;

e)   Private sector agents (importers) are often multi-objective. They do not have their own marketing facilities which lowers the expected efficiency and raises the risk and costs of marketing services.

f)   Although, statistics on cold storage capacity in 1988 were not available, the state authorities cited that the capacity is quite adequate. In 1982, there were 15,125 tons of cold storage capacity in the public sector and 67,931 tons in the private sector. Assuming a storage period of one month per lot, the available capacity was 6,921 tons per month. The average monthly imported frozen red meat, poultry and fish in 1982 was 180,000 tons, i.e. with an average of 15,000 tons a month, i.e. there was a shortage in cold storage facilities at that time. In 1987, the total imported frozen red meat was at the maximum i.e. 201,500 tons which implied a storage capacity of 16,792 tons per month.

However, there are two indicators that the future freezing storage capacity will not be adequate.

1) In 1988 the frozen red meat imported declined to 95,400 tons, i.e. 7,950 tons per month, probably due to a shortage of storage capacity.

2) Even if the current capacity is adequate, this report estimated the quantity required to be imported in 1992, in order to stabilize the retail price at LE 10.6 per Kg, was 367,000 tons, i.e. 30,583 tons per month, i.e. around twofold the maximum hypothized capacity in 1987, i.e. 16,792 tons. If this hypothesis of inadequate freezing capacity is accepted, the estimated amortization costs per ton for establishment of additional capacity would be not less than LE 350. This value should be added to the price of each imported ton of meat.

3) Consumers have become very conservative towards frozen red-meat because their past experience has been negative. Up to the mid-seventies, the government was almost the only importer of red meat. The price was highly subsidized which caused the government to import a poor quality of meat to minimize the subsidy burden. Also, the handling through state marketing channels was very poor which caused quality deterioration of the frozen meat quality. Thirdly, imported frozen carcass is much more likely to deteriorate under poor handling than boneless cuts because of the existence of bones and fat with the meat.

Constraints that Limit Supply of Frozen Red Meat

The private importer who finances the frozen red meat trade faces low investment incentives and risky type of enterprising because of the following market performance characteristics:

1. A very low fixed profit margin at each stage of the frozen red meat market in comparison with the domestic fresh red meat trade. The profit per ton of frozen meat is fixed at: US $19 per ton for the importer; LE 20 per ton for the wholesaler; LE 20 per ton for the semi-wholesaler; and LE 70 per ton for the retailer

Table 10 shows the Egyptian consumer's pound spread among all stages of the meat market. It is clear that all stages acquire only 4.2% of the consumer's LE as an aggregate profit, i.e. as an absolute value of LE 146. It ranges between 0.6% for the wholesaler and semi-wholesaler to 2% for the retailer.

Data of the same year (1987) for domestic red meat (beef) showed that the wholesaler acquired 7.6% from the consumer's LE. i.e. LE 559 per ton as a profit. The retailer acquired about 4.1% from the consumer's LE, i.e. LE 205 per ton. In summary, whereas the profit margin of the domestic red meat trade was LE 854 per ton, i.e. 11.7% of the consumer's pound it was only LE 146 i.e. 4.2% of the consumer's pound for imported frozen meat.

Table 7— Distribution of the Consumer's Egyptian Pound
Among Different Imported Red Meat Market Stages

ITEM OF COMPARISON	LE PER TON	% OF CONSUM
CIF price per ton ($-1 = LE 1.92 in 1987)	2320.7	66.3
Banking Expenses [5% of CIF price]	116.0	
Interest and Finance Expenses	348.1	13.3
Profit for Importer Company ($19 per ton X LE 1.92)	36.48	1.0
Step-wise Fee (1% of CIF price)	18.56	
Imports Fee (1% of CIF price)	23.21	
VIT. Carantine Duties (LE 5/ton)	5.00	1.4
Investigation Duties	1.00	
Re-investigation Fee (LE 2/ton)	2.00	
Expenses up to the cold store in the port	8.81	
Other Expenses	364.80	11.2
Transportation Expenses from the Cold Store		
to outside the port	20.00	
Profit Margin for the Wholesaler	20.00	0.6
Storage Expenses	25.00	
Less & Wastage Costs (0.5% of CIF)	11.60	3.6
Packing & Processing Expenses	90.00	
Semi-Wholesale trader's profit	20.	0.6
Retailer Profit	70.	2.0
Consumer's Price	3501.26	100.0

The private agent can not stay in business with these fixed profit margins for the frozen meat market and even if he tried to raise the profit at least to 50% of the domestic meat market he would not be able to compete with the public sector supply to the meat market in state stores.

As noted earlier, there was a sharp drop in frozen meat imports by the private sector (the shrinkage was almost 60% of 1987). Even though domestic prices increased in 1988, imported red meat was not as competitive because of changes in two major factors:

i.   The average CIF price increased from $1209 to $1445, i.e. at a rate 19.5%.

ii. The exchange rate increased from LE 1.92/US dollar to LE 2.35 US dollar, i.e. at a rate 22.4%.

Therefore, the retail price should have increased by about 42%. Assuming the same fixed margins, the retail price should be LE 4.97 per Kg. However, if the private sector wanted to acquire the same margin of profit as exists for the domestic fresh meat, i.e. 11.7%, the retail price at private stores would have to be LE 5.62 per Kg which would be considered either an illegal price or at least it could not compete with the public sector price. This situation would be particularly true in view of the fact that state stores sell fed buffalo bulls from the veal project at subsidized prices.

3. If the private sector tried to move to a higher income class (the majority around the average) good quality frozen red meat cuts would have to be imported. In 1988, the CIF price for good quality was $1900, i.e. 31.5% higher than the average price of the regular quality red meat imported in 1988. Accordingly, the profitable consumer price would be LE 7.1. Such a price would not compete with the domestic fresh meat price (good quality) at LE 10 per Kg. Consumers (with income level above the average) would prefer to have less quantity of domestic red meat (one third less) at LE 7.1 per Kg.

_____ and long administrative procedures are required to _____ the full permission to deliver the frozen red meat to ___ _____ market (around 20 steps). The banking services to _____ the credit letter is also tedious.

PROJECTIONS OF RED MEAT PRICE 1992

The second Five-Year Development Plan (FYDP) (1987-1992) ends in 1992. Therefore, the retail price of red meat in 1992 was forecasted, given the 1986 level as a base year, and according to the major targets within the FYDP that affect the demand for red meat.

Demand for Red Meat

The price flexibilities of the demand for red meat (fed beef) were estimated from a recursive model of demand for meat as follows:

1. A decrease by 1% in red meat quantity increases its retail price by 0.41%.

2. An increase by 1% in real annual per capita income increases the red meat price by 0.31%.

~~Annual~~ Economic Growth

~~The initial~~ report of the FYDP showed that the annual economic ~~growth~~ rate is expected to be 3.9% a year. However, due to changes ~~in several~~ macroeconomic variables 1/, since 1986/87, this study ~~assumes an~~ annual growth rate of only 2%.

~~Growth~~ in Production of Red Meat

~~The~~ major project within the FYDP is the fattening of the ~~buffalo-veal~~ calves (males). This project is expected to add 75,000 ~~to 125,000~~ tons carcass weight by 1992, i.e. with an average 100,000 ~~tons.~~

~~Accordingly,~~ this study forecasts the retail price level of red meat ~~in 1992,~~ given the two major changes mentioned above as follows:

~~1.~~ Impact of Income Growth (Demand Increase) on Retail Price

~~If~~ the real per capita income increased by 2% a year, the ~~retail~~ price of red meat in 1992 would be LE 18.1, i.e. around ~~100%~~ of its average in 1986.

~~1/~~ The variables are known, but beyond the limited scope of this ~~study.~~

2. Impact of Production Growth (Supply Increase) on retail Price

If the fattening of buffalo veal project reached its target, i.e. 100,000 tons carcass weight, 1.75 kg per capita per year in 1992, the retail price of red meat would be less than that level expected due to the economic growth, i.e. it would be LE 16.7 instead of LE 18.1, i.e. 8% less.

Impact of Retail Price on Prices at Other Market Stages

It has been shown that red meat is a demand-oriented market. Therefore, a recursive model is used to forecast the price of red meat of the derived demand levels, i.e. wholesale, producer (fed beef) and farmer (feeder calf). For more explanation, the producer means the feed lot operator who purchases the feeder calf (the calf raised by the small farmer up to the age and weight suitable for commercial fattening). The farmer is the conventional small farmer who is the major livestock breeder and raises the calves up to the suitable weight for fattening by the feed lot operator.

Therefore, table 11 summarizes the sequence of red-meat price increases derived from the retail price increase due to economic growth and/or buffalo-veal fattening project achievement.

Table 8— Forecasted Price at Retail Level

and the Successive Marketing Stages 1/

PRICE AND MARKETING STAGE	ECONOMIC GROWTH 3% ANNUALLY (DEMAND INCREASE) LE/Kg	% 1992 PRICE TO 1986 PRICE %	ECONOMIC GROWTH ADDITIONAL SUPPLY OF 100,000 TONS LE/Kg	% 1992 PRICE TO 1986 PRICE %
Retail price	18.1	329	16.7	303
Wholesale price	14.5	329	13.9	316
Beef	9.1	360	8.7	346
Calf	5.4	213	5.3	208

1/ Estimated from a recursive demand model, where red-meat is a demand oriented market.

Role of Red Meat Imports on Price Stability

In 1988 the average retail price of red meat was LE 9.9 per kilogram. Price stability means a moderate increase in the price. Up to 4% annual inflation in price level is reasonable. Therefore, a reasonable target for the red meat retail price in 1992 is LE 11.59 per Kg which is the 1988 retail price inflated by 4% a year.

Under the assumption of FYDP success as shown in table 11, the retail price in 1992 would be LE 16.7 per Kg. To reach the target level of LE 11.59 per Kg, red meat would have to be expanded in 1992 by 357,000 tons above the expected level (using the price flexibility from the demand function referred to earlier). This quantity (357,000 tons) should be the target of imports policy in 1992. In 1988 the quantity imported was about 177,000 tons. The maximum imported quantity was 262,000 tons in 1987. The additional expansion in red meat imports above the 1988 level should be about 180,000 tons.

Role of Imported Red Meat in a Cost-Effectiveness Oriented Economy

Soliman (1982) showed that domestic meat costs are much higher than the cost of imported meat. The net economic protection coefficient ranged between 1.3 for imported live cattle to 2 for boneless imported frozen ·cuts. He showed that imported red meat in the form

... carcass and frozen cuts are the cheapest type of meat. ...'s paper (1982) provided evidence that highly increasing ... of domestic red meat would have persisted, because of almost ... supply and highly increasing price of feeder calf (More ... one-half of the meat production costs).

... application of the free exchange rate and the international ... inflation in recent years, it is assumed that the domestic red ... price has become closer to the border price. Tables 9 and 10 ... the calculated nominal rate of protection of domestic price to ... border price. Generally, the two tables indicate that:

- ... with respect to imported live animals, prices were higher than ... domestic prices in 1985 and they were equivalent in 1986. ... the domestic price was 22% above the border price. ... in 1988, the border price of live animals was almost ... same as the domestic one, because the price increased by 7% ... 1987 and 1988, while the domestic one raised by only ... . The conclusion is that to rely upon importing live bulls ... slaughtered is not an economic policy.

2. With respect to imported frozen meat, the domestic red meat price is always much higher than the border price of imported frozen meat at a comparable market stage than gate price. The domestic red meat price was 5% above the domestic price in 1985 and this difference expanded to 9% in 1988 (Table 1). Therefore, assuming the quality of the domestic and imported beef is the same, the policy should be to increase the quantity of imported red meat.

Table 9-- Nominal Rate of Protection for Domestic Fresh
Boneless Meat VS Equivalent Live Animals

	IMPORTED LIVE ANIMALS PRICE			DOMESTIC FRESH RED MEAT		
	EQUIVALENT CIF/FG US $ BONELESS MEAT (2)	EXCHANGE RATE LE PER US $ (3)	EQUIVALENT CIF PRICE BONELESS MEAT (KG) LE (4)	RETAIL PRICE LE/KG (5)	DISCOUNTED PRICE FOR MARKETING MARGINS LE/KG (6)	NOMINAL RATE OF PROTECTION (6)/(4) (7)
		1.60	3.52	4.21	3.36	0.96
		1.90	3.71	4.98	3.99	1.07
		2.19	4.13	6.30	5.04	1.22
		2.30	6.54	8.13	6.51	0.99

Trade Year Book

percentage * proportion of boneless meat in weight]

where the estimated marketing margin between and producer was 20% for equivalent boneless meat.

Table 10— Nominal Rate of ~~Protection for Domestic~~

Fresh Red Meat ~~VS Frozen Red Meat~~

YEAR	CIF PRICE OF FROZEN MEAT		LE/KG	~~DOMESTIC RETAIL PRICE~~		NOMINAL RATE OF PROTECTION
	US $ PER TON	EXCHANGE RATE LE/US $		RETAIL PRICE LE/KG	~~IMPORTED~~	
	(1)	(2)	(3)	(4)	(5)	(6)
1985	1262	1.60	2.02	4.21	3.36	1.67
1986	1099	1.90	2.09	4.98	3.99	1.91
1987	1400	2.19	3.07	6.30	5.04	1.65
1988	1445	2.30	3.32	8.13	6.51	1.96

Table 11 shows that without any expansion in the supply and with successful economic growth due to FYDP in 1992 the consumer will spend LE 179 for almost 10 Kg. With full implementation of the buffalo veal project. The expenditure per capita would be LE 194 for 11.7 Kg and with expansion in imported red meat to achieve a stable domestic price of LE 11.58 per Kg, the consumer expenditure would be LE 165 for 17.8 Kg.

Table 11— Impact of Importing ▩▩▩ ▩▩▩ ▩▩ ▩▩ ▩▩▩▩ Market
▩▩ ▩▩▩▩

	POLICY OPTION	▩▩▩▩ ▩▩▩▩▩ OF PED		
		▩▩▩	▩▩▩▩	ANNUAL
		▩▩▩	▩▩▩▩	EXPENDITURE
		▩▩▩▩	▩▩▩	ON PED
		▩▩▩	▩▩	MEAT
		▩▩▩		▩▩ DELTA
				▩▩
1.	Annual Economic Growth at ▩ without supply expansion	▩▩▩	▩▩▩	▩▩▩
2.	Option (1) + additional supply of 100,000 tons from full implementation of the buffalo veal project	▩▩	▩▩▩	▩▩▩
3.	Options (1) + (2) + importation of 350,000 tons frozen beef to stabilize the domestic red meat price at LE 11.58*	▩▩ ▩▩ ▩▩	▩▩▩ – ▩▩▩	▩▩▩ ▩▩

* The price in 1988 with an annual inflation rate of ▩▩.

A forecasted* price of the imported frozen meat at ▩▩▩▩ level in the domestic market = [(1988's price * ▩▩▩▩▩▩▩ market inflation) * (1.2)]

Finally, several research studies show that the feed use for livestock has the highest opportunity cost in producing milk and that red meat has the lowest priority among animal products for economic feed resource allocation.

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Tables:

): (1-4) Monthly Structure of Aggregate Imported Live Animals and Frozen Red Meat According to Origin & Type (1985-1988)

): (2-3) Monthly Structure of Imported Live Animals & Frozen Red Meat By Public Sector According to Origin and Type (1985 - 1987)

-1): (3-2) Monthly Indogenous Slaughtered Animals in Slaughter Houses By Type (1985-1988)

-1) Monthly Retail Prices of Domestic Red Meat

-2): (4-3) Monthly Average CIF Price By Type & Origin to Egypt in US$/Ton through (1985 - 87)

Table(1-1): Monthly Structure of Aggregate Imported Live Animals & Frozen Meat According to Origin & Type in 1985.

		Jan.	Feb.	March	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
I Live animal													
Cattle					(head)								
	Europe	6713	652	4408	2898	4281	7400	2153	7145	7145	4045	2386	—
	Australia	20	200	98	20	250	80	—	80	610	200	50	—
	Somalia	2043	—	2154	2057	1692	5378	—	1910	—	—	—	—
	Sudan	4301	1742	1997	487	—	—	4188	749	—	—	—	—
Total		21600	18508	21408	13580	13554	10363	9502	9315	12552	1352	31723	2
Sheep		—	—	—	—	—	—	—	105	—	—	—	—
Camel		2161	21012	20069	24943	9151	11167	17218	20663	22416	6177	34391	2
II Frozen Red Meat													
Frozen													
Chilled													
Liver		1135	4161	4315	12	2498	2698	2498	2340	4230			
Total (2)													

Table (4-2) Monthly Structure of Aggregate Imported live animals & Frozen meat According to Origin & Type in 1986.

	Jan.	Feb.	March	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Total
I. Live animal						*head*							
Cattle													
Europe	6157	4273	4363	8243	6076	6481	4817	4729	—	5641	4819	7338	55287
Australia	—	50	—	—	—	—	—	1301	54	366	1841		
Somalia	—	—	2542	2598	—	2515	—	—	—	—	7712		
Sudan	—	—	—	—	—	—	—	—	—	—	—		
Camels	12543	15777	10844	9903	9669	6395	6676	3904	1194	1663	5246	7234	96246
Sheep	—	—	—	—	—	—	—	—	—	—			
Total (1)	16700	20100	23106	15794	15745	12876	14008	8633	2495	7304	10159	14938	161858
II. Frozen Red Meat							*ton*						
Frozen	8142337	1089879	8840050	7220016	2356648	763114	2181196	4107919	11713555	10126442	7724432	3283721	12296608
Preserved	1454502	912067	1450689	155457	242157	71	1322402	1714665	1428544	1013034	1603343	2062463	15062559
Chilled	—	71616	85785	38893	52382	—	6581	38615	43230	51276	3664	3872	427197
Liver	1579678	2214756	1998451	1150044	4203648	206882	2786165	1469290	2706736	712637	1620022	1616044	24694445
Total (2)	4144563	4693852	12379089	9195.4	2856423	9609016	2412846866	7229829	15695442	11791389	1142231	7351555	4782926

Aggregate of Public & Private imported quantities.
Source : MOA, General Circle Customs:

Tabl 3-3). monthly structure of aggregate imported live animals & frozen meat According to Origin & Type in 1987.

	Jan.	Feb.	March	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Total
Live animal							head						
Cattle	3186	2236	2872	3183	3253	2262	5143	2716	32-9	6606	7136	35-1	45243
Europ.													
Australia	—	66	—	—	—	—	—	—	—	—	—	—	861
Somalia	—	—	—	—	—	—	—	—	—	—	—	—	—
Sudan	—	—	—	—	—	—	—	—	—	—	—	—	—
Camels	4486	5079	4326	5853	3117								
Sheep		7746											
Total													
Total	3942121.91	13315-117	124000643	12143-365	23961-057	2843-554	6482323	12552911	6603-96	4823783	3372456	2432223.95	

Aggregate of public & Private imported quantities.
Source : mUA, General Cirantines.

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Table(4): monthly Structure of Aggregate imported live ANimals & Frozen Meatt According to Origin & Type in 1988.

	Jan.	Feb.	March	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Tot
I Live animal						head							
Cattle													
Europ.	414	141	389	145	2.267	3057	3681	7885	6300	736	—	—	3165
Australia	—	—	—	—	—	—	—	—	—	—	—	—	1
Somalia	—	350	1543	—	—	—	—	—	—	—	—	—	—
Sudan	—	—	—	—	—	—	—	—	—	—	—	—	—
Camels	9511	6668	9344	7747	3954	6358	4725	3602	5458	—	—	—	5
Sheep	—	—	—	—	—	—	—	5585	2338	568	—	—	8
Total (1)	9925	7179	11276	7892	8221	9415	846	16872	1496	7926	—	—	101
II Frozen Red Meat						ton							
Frozen	2586.833	3925.804	2434.60	1192.608	1556.713	2069.83	13195.416	1847.295	107 1439.24	4587.406	—	2611.5	98
Preserved	900.205	648.841	66.831	1143928	1091.656	782.258	649.401	670.72	716.812	675.291	—	—	804
Chilled	1.645	2.181	42.017	—	26.259	38.180	34.353	2.540	731	—	—	—	152
Liver	3094.563	1777.363	—	1679.151	2.65.63	3333.54	1687.232	3744.359	141.309	5356.372	—	1624	222
Total (2)	6883.246	6353.864	3083.451	3422.178	1665.4203	241.2891	15774.02	22085.305	460.2716	16618.719			13510

Aggregate of public & Private imported quantities.
Source: MOA, General Circle carantines.

Table (22): Monthly Structure of Imported Live Animals and Frozen Red Meat By Public Sector According to Origin and Type in 1986

Month / Type	Jan.	Feb.	March	April	May	June	July	Aug.	Sep.	Octo.	Nov.	Dec.	Total
animal						Ton							
cttle													
Sudan	316.5	474.9	—	—	—	—	—	—	—	—	—	—	1030.7
Somalia	—	—	835.3	806.3	—	817.9	—	—	—	—	—	—	24595
Lrhanda	—	699.5	—	678.7	—	—	—	—	—	—	—	—	13782
tin Europe	347.3	46.8	572.5	94.6	—	626.8	333.9	—	—	—	—	—	3189.4
،،	657.8	884.7	267.3	238.96	—	866.1	1151.8	—	—	—	—	—	8573
Frozen Red Meat						Ton							
Llanda	274	—	480.8	310.7	—	2947	1758	220.5	992	—	—	—	18531
E.C	—	—	—	—	—	—	—	1088	—	—	—	—	
Others	885	3328	—	—	—	—	—	—	—	—	—	—	6301
col (2)	4599	3328	488	310.7	—	2947	1758	3293	992	—	—	—	24835

Table (2-3) : Monthly Structure of Imported Live Animals and Frozen Red Meat By Public Sector According to Origin and Type in 1987.

Months	Jan.	Feb.	March	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Source & Type												
I- Live animal												
cattle				(on								
Sudan	—	—	—	—	—	—	—	—	—	—	—	—
Somalia	—	—	—	423.8	—	—	337.9	—	—	—	—	—
Irhaoda	—	—	—	2576	20.5	1699	202.6	—	—	—	—	—
Eastern Europ	—	—	—	—	—	—	—	—	—	—	—	—
Total				6814	2095	1699	2026	337.9	—	—	—	—
				(on								
II- Frozen Red Meat												
Ireland	2915	—	—	1906	0999	—	—	—	—	—	—	—
E.E.C	—	—	—	161.5	174.6	—	—	—	—	—	—	2.5
Others	—	—	—	—	*5o163	—	—	—	—	—	—	5o
Total (2)	2915	—	—	3521	2739	*5o163	—	112.7	135.2	—	—	872 11

Table ( ) Indigenous Slaughtered Animals in Slaughter Houses Monthly By Type (1985 – 1986)

(head)

Month	Domestic										Imports					Total merged slaughter
	Culled Bulls	Culled Cows	Culled Buffalo	Buffalo Veal	Fed Buffalo Bulls	Fed Beef	Sheep	Goat	Pig	Total	Sudan Culled Bulls	Irish Bulls	Camel	Marine Sheep	Total	
January	35	2810	5712	20891	15362	40825	38767	2584	6808	137836	3114	7793	8384	—	19291	157127
February	83	2438	5154	16463	12465	33920	33315	1890	5694	111396	1705	5553	8620	—	15878	127274
March	824	2713	5217	15165	13113	33371	36124	2063	4137	112127	1262	7430	9304	6	18402	130529
April	64	2831	5405	11194	12412	32831	39197	2304	5615	111723	988	6900	11007	—	18896	130829
May	95	3326	7058	10359	16194	42172	41859	2288	5189	130543	98	9477	14255	—	23860	154407
June	92	2706	6451	9662	15322	38205	44293	2760	4280	124879	26	7768	13004	—	20798	145637
July	43	1385	6924	14504	15815	37384	48611	2942	5402	137010	1697	6394	11806	—	19819	156707
August	84	3303	8143	17597	17735	46339	63228	3255	3995	166383	2475	7382	10873	7375	28655	194338
September	31	2421	6358	20104	13958	35433	30564	2190	5336	116775	2278	4900	7997	1492	16667	133462
October	52	3180	7563	27771	17893	43269	38556	2655	6247	147184	2411	4089	10310	2440	20820	168004
November	57	2931	7207	26872	19474	29528	35677	2663	6258	144637	349	5221	10526	4450	20544	161221
December	33	2879	6402	21118	17421	35743	35325	2316	6625	127312	267	4957	11337	4840	21383	148695
Total	891	34933	77689	211632	189156	461436	487266	31910	65566	1564479	16531	781368	127791	21603	244272	1808772
January	40	3985	7705	22515	20134	44956	41143	2058	7717	148292	1571	2723	11183	1163	16640	164937
February	27	3936	6542	16844	14629	34247	32639	2354	5563	116634	34	2465	3965	628	13072	129706
March	75	3635	712	15154	15913	35040	35112	2629	5575	120257	551	4147	9426	—	14126	134383
April	80	4219	8563	12277	15333	36922	41853	2982	5305	127388	95	4636	9889	—	14670	142504
May	176	4212	9627	9538	18463	46272	44728	4225	6777	144620	127	6183	9583	—	15873	159913
June	134	3023	8418	9217	17719	37069	42362	2608	5581	123374	4	3298	8118	—	11418	135212
July	25	3222	8968	14182	16811	42206	45392	3249	6586	140941	29	4545	8448	—	13072	154013
August	63	2746	8625	15505	20960	41207	57143	2231	4599	153085	1418	4073	6458	375	12320	152063
September	28	2903	7732	19045	19240	37580	29832	2268	5625	124263	399	3921	4723	596	9689	133902
October	42	3645	7561	26412	23928	41284	34284	2849	6917	154110	119	861	3658	2828	7941	161576
November	41	3344	7670	21271	18937	38649	29106	2323	5086	126227	—	1002	3257	1588	5883	132070
December	47	2787	7958	19928	19321	40224	34658	2384	6122	137924	127	1066	4103	1139	6440	144364
Total	798	42652	101700	202038	218207	478346	468980	33160	71561	1617436	4474	39900	87816	8313	146509	1757739

Source: MOA, General Circle of Slaughter Houses

1987

1988

	Culled Bulls	Culled Cows	Culled Buffalo	Buffalo Veal	Fed Buffalo Bulls	Fed Beef	Sheep	Goat	Pig	Total	Sudanese Culled Bulls	Friesian Bulls	Camel	Mound Sheep	Total	Total no. of slaughtered animals
1987																
January	50	3648	690	2048	29738	61006	22653	22608		141364	1	669	3746	418	5533	14729
February	47	3549	631	16079	16707	34710	23113	2660	5460	12332	1	308	3612	494	4394	125312
March	93	3625	7668	13011	15915	33898	35230	2308	5564	11329	1	1232	3794	1042	6043	123132
April	79	4189	8555	11375	39882	40875	34406	6953	11329	126751	1	319	1787	2538	6644	137362
May	90	2953	6836	7387	15581	30652	4130	4419	10329	126751	6	7644	4836	11777	17347	144116
June	71	2521	6841	888	32069	28413	4830	4320	10329	126751	623	274	1985	2924	7866	11078
July	51	2928	8655	13556	19503	31987	3646	4863	123104			1801	4035	3220	31488	157615
August	37	2356	8116	12830	21001	37365	4656	2323	128248			2619	2341	6659		135207
September	41	2450	8195	24453	22057	33845	2626	2327	136791			230	390	4526		161217
October	35	2428	8262	29660	29293	45296	3364	5956	163323		167	370	89	3957		171544
November	46	2442	7258	16361	22516	30208	2576	4883	126323			451	118	4130		138247
December	59	2829	6857	18675	24317	36917	2917	6259	141323		10	5336		5346		149673
Total	716	35940	92568	181659	235797	479916	33659	61045	1583519		629	48918	34504	9665		1654124

| | | | | 53 | | | | | | 28 | | 103 | | | | 103 |

	Culled Bulls	Culled Cows	Culled Buffalo	Buffalo Veal	Fed Buffalo Bulls	Fed Beef	Sheep	Goat	Pig	Total	Sudanese Culled Bulls	Friesian Bulls	Camel	Mound Sheep	Total	Total no. of slaughtered animals
1988																
January	65	2260	5522	17773	20601	33983	2689	5223	129473	33	166	4527	4716			137813
February	40	1527	6071	15891	37868	31236	2556	4806	117913	507	119	4837	5613			123526
March	75	3325	8044	19856	39752	35582	2589	4159	130288	1036	54	6905	9045			138333
April	101	3436	8369	1902	20510	31433	3547	5463	124830	1401		8365	9766			134637
May	125	2997	7855	7953	36565	32892	3531	4846	114472			8510	8510			122982
June	50	3345	9886	7956	36372	32265	2974	4382	115922	434		7987	7957			123331
July	99	3054	8945	21695	23712	52491	2662	4522	116473		7517	6592	16543			161016
August	45	2317	7077	14779	17661	34166	2346	5069	119432	189	6373	1095	31688			121490
September	41	2502	7313	16034	21470	31885	2322	5859	126257	659	5335	210	5534			131991
October	64	2884	7160	15921	36289	30080	2730	5026	122581	372	5026	100	5285			128367
November	59	2958	6592	20595	35943	34555	2941	4717	125919	857	5743	969	2080			133048
December	63	2688	5360	16798	37204	26181	2799	4717	128154		5747	552				135310
Total	831	34275	87203	170272	239529	455037	34658	59867	14857991	3027	2850	76972	9548	92397		1588194

Source: MOA, General Circle of Slaughter Houses.

Table (4.1) : 'Monthly Retail

Prices of Domestic Red Meat (1985 - 1983)

(PT/Kg)

item	Jan.	Feb.	March	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Halo Veal	..	456.0	456.2	459.0	459.5	467.0	449.9	470.8	458.8	476.3	477.4	482.0
Beef Bulls (Kandar)	..	461.9	420.7	461.9	461.7	464.7	433.7	464.3	428.5	467.6	477.4	473.8
Mutton	..	463.20	455.0	464.0	464.7	466.3	477.5	468.8	424.80	477.6	475.0	476.30
Halo Veal	478.6	..	492.9	497.6	479.7	507.1	498.9	537.3	532.10	538.16	539.3	--
Beef Bulls (Kandar)	470.0	--	487.5	488.0	456.30	500.0	473.5	525	518.5	523.8	540.5	--
Mutton	481.0	--	495.0	495.80	456.60	507.2	462.3	545.2	526.80	529.8	539.30	--
Halo Veal	554.4	57.0	597.6	619.10	606.8	645.2	654.8	663.5	669	672.4	675.6	6375
Beef Bulls (kand)	554.3	513.4	588.1	617.9	586.9	633.6	652.5	664.6	670.5	674.6	675.8	677.4
Mutton	548.6	572.5	592.9	610.7	580.10	629.8	652.6	664.2	671	664	673.0	631
Halo veal	685.1	768.5	733.0	760.0	797.7	829.8	856.3	852	836.3	856.4	861	869
Beef Bulls (kand)	690.9	70.8	742.0	770.6	806.7	832.0	850.9	850	875.4	871.2	879.5	883.8
Mutton	682.1	70.12	734.9	755.1	799.1	732.5	870.1	885	889	884.2	888.3	821

-- : Not available

Source : CAPMAS

Table (4-2): Monthly Average CIF Price By Type And Origin To Egypt in US $ (1985)

US $ / Ton

	Jan.	Feb.	March	April	May	June	July	Auga.	Sep.	Octob.	Nov.	Dec.	Total
I. Live animal Cattle													
Sudan	1752.3	1752.3	1752.3	1752.3	—	—	1752.3	—	—	—	—		1610.4
Somalia	1100	1100	1100	1100	1100	1100	1100	—	—	—	—		1094.6
Ireland	—	1000	1000	1000	1000	1000	1000	—	—	—	—		1000.02
Eastern Europ	—	—	—	—	—	—	—		918.91	966			939.4
II. Weighted Average	1458.1	1052.8	1598.6	1549.6	1093.1	1000	1073.9	1063.0	1121.3	—	918.9	966	1134.1
Frozen Red Meat													
Islandes	1421.97	1505	1582.97	1579.94	1165.35	—	1137	—	—	910			1430.23
EEC	—	—	1190	1194.16	1280	—	1065.022	1047	1159	—	1122		1177.02
Other	—	—	2860	2347	—	—	1427	3463.416	—	137.0	1094		3627.67
Weighted Average	1421.97	1505	1532.6	1291.57	1189.5	—	1176.8	1138.8	1159	1370	1070		1261.7

Table (4-2): Monthly Average CIF Price By Type And Origin To Egypt in US$ (1986)

US $/Ton

	Jan	Feb	March	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Total
I. Live Cattle													
Sudan	1752.30	1752.30	–	–	–	1752.3	–						1752.1
Somalia	–	–	922	921	–	–	922	–	–	–	–		922
Ireland	–	–	–	922	922	–	–	–	–	–	–		922
Eastern Europ	966	966	966	–	966	966	966	–	–	–	–		882.95
Weighted Average	1344.3	1388.1	946	923	946.8	1068.5	934.8	–	–	–	–	–	1045.6
II. Frozen Red Meat													
Sudan	1127	–	–	1127	1127	1127	1127	1127	1127	–	–	–	1126.98
EEC	–	–	–	–	–	–	–	–	–	–	–	–	1017.8
Other	990	920	–	–	–	–	–	1150	–	–	–	–	1017.8
Weighted Average	1070.9	990	1127	1127	1127	1127	1127	1134.6	1127	–	–	–	1099.3

Table (4.2): Monthly Average CIF Price By Type And Origin to Egypt in US $ (1987)

	Jan.	Feb.	March	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Total
I. Live animal Cattle													
Sudan	—	—	—	—	922	—	—	—	—	—	—	—	922
Somalia	—	—	—	—	—	—	—	—	—	—	—	—	1182
Srilanda	—	—	—	—	—	—	—	—	—	—	—	—	915.6
Eastern Europe	—	—	—	915.8	915.8	915.8	915.8	—	—	—	—	—	915.6
II. Weighted Average 1	—	—	—	919.6	915.8	915.8	915.8	1182	—	—	—	—	973.5
Frozen Red Meat Irlanda	1127	—	1357	1127	—	—	—	—	1260	1260	—	1260	1223.3
EEC	—	—	—	1166	1166	—	—	—	—	—	—	—	1160.13
Others													
Weighted Average 2	1127	—	1266.7	1144.6	—	—	—	—	1260	1260	—	1260	1208.7