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PROTECTIONISM IN THE INTERNATIONAL MEAT TRADE

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There have been signs in the 1980s that the international trade in meat is becoming more protectionist in terms of barriers to trade. A 1983 report from the Organization for Economic Cooperation and Development (OECD) stated that 'Government intervention in domestic and international meat markets is increasing. All major beef importing countries now control beef imports in some fashion.' At times it appears, particularly to observers in North America, that the main cause of this increase in protectionism is the Common Agricultural Policy (CAP) of the European Economic Community (EEC). This paper seeks to outline recent developments in the international meat trade, and makes comparisons with trends in world trade for coarse grains and soya.

WORLD MEAT TRADE THE 1980S SITUATION

World trade in meat and livestock amounted to about 10 million tonnes in 1982 and this estimate does not include trade within EEC countries which adds another 4 million tonnes. Furthermore, despite the emergence of new impediments to trade, the volume of meat traded in 1982 accounted for about 8 percent of world production (10 percent if intra-EEC trade is included). A more significant development is the actual growth in the volume of meat entering international trade. The 1980s level of world trade in meat is approximately twice the level of the 1960s (and even higher if EEC trade is included - Table 1) and one and a half times the level in the early 1970s. Although this is a somewhat slower rate of growth than that for coarse grains and oilcakes; it still represents a significant increase (Table 2).

While some of the increase in meat trade has occurred at lower than commercial prices (due to such factors as export refunds, state trading etc), it still needs to be emphasized that, as in the case with most major agricultural commodities, world trade in meat is substantial and is rising. Both the volume and proportion of meat traded has increased significantly. Other dynamic changes in the world meat trade are also noted, i.e., changes in the composition of the commodities traded, sources of imports, and the destinations of exports.

Geographical meat trade flows have changed. Exports increased during the 1970s and 1980s from Brazil, the EEC countries and North America. Conversely, the share of world meat trade accounted for by Australia, Argentina,

Eastern Europe and the developing countries of Africa declined. On the import side, there has been a dramatic reduction in meat imports into the United Kingdom. The UK was traditionally the world's largest meat importer and as recently as 1962 accounted for over a third of world meat imports. In the early 1980s, however, the UK accounted for less than 10 percent of world meat imports. There has also been a decline in the share of meat imports by the EEC in total, as well as in North America. Conversely, meat imports increased into the Middle East, North Africa, Japan and the USSR.

Turning to the individual meat categories, there was a marked growth in the world beef trade between 1962 and 1982. In addition to Argentina, Uruguay, Australia and New Zealand, -- the traditional exporters -- the EEC, Brazil and the United States emerged as major exporters. The main growth in beef imports between 1962 and 1982 occurred in the Middle East, Japan, South Korea and Southeast Asia.

Exports of mutton and lamb are dominated by Australia and New Zealand. In addition, over 6 million live sheep are exported from Australia. The only traditional major importer of sheep meat is the United Kingdom; however, the Middle East and Japan emerged as large import markets for sheep meat in the 1980s.

The EEC, Eastern Europe and the United States all now export sizeable volumes of pork although the most marked growth has been in EEC intra-community trade. Japan has been the main growth area for pork imports.

The most marked growth in world meat trade has taken place in poultry meat. Brazil and the EEC have emerged as major exporters of poultry in addition to the United States. The Middle East and the USSR are the main importers of poultry meat.

THE EXTENT AND DESIRABILITY OF PROTECTIONIST MEASURES

Before looking more closely at the mechanisms associated with barriers to trade in the meat sector, the main arguments for and against trade barriers need to be set out, particularly those relating to trade in agricultural commodities. Available data on the volumes and growth in world trade do not indicate the extent to which there are distortions to trading patterns. Perhaps the best indication of the extent of the barriers to free trade is to make price comparisons between countries. Beef prices, published by

the Food and Agriculture organization (FAO), reveal that in 1982 average wholesale prices in Japan were 5 times as high as in Australia or Argentina, while prices in the United States were 2 1/2 times as high and in the EEC 3 times as high (Table 4).

It is clear from these data that; even after allowing for differences in quality, in transport costs, and the inevitable imprecision of the statistics; world trade in beef is far from free. A higher degree of protectionism operates in the beef sector than is generally the case for the other meat sectors, although there are notable exceptions in the case of pork and sheep meat; protectionist measures are least apparent in relation to trade in offals.

Free international trade is a desirable ideal in the meat and livestock sector as well as in other sectors of the economy. Economic theory suggests that in conditions of perfect competition and under the law of comparative advantage, both importing and exporting countries benefit when international trade is made as free as possible -- the major benefit for all countries being the increasingly efficient use of resources. There may be doubts about the validity of economic theories in specific cases but the worst effects of protectionist policies are evident to all. There is the increasing instability in world market prices as well as the higher consumer prices for food and the high cost of various government agricultural programs, which have to be paid by the tax-payer.

Although it is right to be skeptical about official justifications and attempts to increase protectionist measures in the meat sector, there are, nevertheless, legitimate reasons why Governments do introduce such measures. First, there is the desire to achieve and maintain certain levels of self-sufficiency for strategic and political reasons and above all reduce reliance on uncertain foreign supplies. Second, there is the aim of maintaining employment levels in the agricultural sector (including the industries associated with agriculture), particularly in the face of mounting industrial unemployment. Third, there are sometimes pressing balance of payments reasons for protecting a domestic agricultural industry. Finally, there are the various social reasons for supporting farmers' incomes in the face of increasing hardship in rural areas. We may feel that these reasons have limited importance when measured against the benefits which accrue from free trade. Nevertheless, we must recognize the pressures faced by any Government when presented, not only with these arguments, but also by the increasing tendency for other countries to perceive their national interest as being served by raising support measures for farmers.

One final point is that some of the loudest pleas to increase the freedom of international trade in agricultural products come from countries which are very highly protectionist in industrial products. This is not, therefore, a black and white area where countries can be easily divided into angels

and villains - all countries represent different shades of grey.

TARIFF AND NON-TARIFF BARRIERS TO INTERNATIONAL TRADE

Prior to 1930, the only major forms of trade protection were customs duties and import levies usually applied as fixed ad valorem charges. Since World War II, international negotiations have concentrated on limiting, and where possible reducing, these forms of tariff barrier while in their place we have seen the proliferation of the so called 'non-tariff' barriers. The GATT secretariat lists no less than 800 different types of tariff or non-tariff measures adopted by various countries. It is therefore very difficult to summarize them satisfactorily. Nevertheless they can be best subdivided into the following five headings:

1. **Charges on Imports:** Customs duties and import levies remain the most widely used forms of trade protection. As much as 160 percent ad valorem is still imposed on meat imports in certain parts of the world. However, with the wider application of variable levies, requirements for prior deposits, other special duties on imports (which may vary according to country of origin) and the selective use of internal taxes, the use of import charges has become much more sophisticated.
2. **Custom Procedures and Other Entry Requirements:** There are many examples of documentary procedures and certificates required at the point of entry which serve to make importing more difficult for the exporting country. Not only is there an increasing tendency for importing countries to demand certificates in their own language, but there is in some cases a deliberate attempt to restrict imports by requiring that customs declarations be made at an arbitrary and, in geographical terms, often highly unsuitable port of entry. Moreover, there are the less formalized problems of dealing with the 'single buyer' markets in the Middle East and North Africa; the barriers to trade which these systems represent should not be underestimated.
3. **Quantity Limitations:** Under this heading, quotas or voluntary restraint agreements limit the amounts of meat or the number of live animals which can be imported into a country. Examples of such arrangements are the Meat Import Laws applicable in the United States and Canada or the Voluntary Restraint Arrangements on sheep and sheep meat imports into the EEC.
4. **Standards and Specifications Required by Importing Countries:** Primary among these measures are the public and animal health requirements which exist in many of the major importing countries. In relation to trade in chilled and frozen beef and veal, the animal health requirements (due particularly to foot and mouth disease) stipulated by two major importing areas - North America and Japan - mean that only

Australia, New Zealand and Ireland among the major beef exporting countries can export to these markets. This has effectively resulted in two 'zones' of the world beef trade, -- one of which includes North America, Japan and Australia, and the other includes South America, Western and Eastern Europe, North Africa and the Middle East. Animal health requirements also act as a barrier to trade within continental Europe and even within the European Economic Community. Denmark, Holland, France, Great Britain and Ireland are isolated from some of the other countries by regulations directed at preventing the spread of specific animals diseases. However, health measures are not the only factors under this particular area; there are also such factors as labeling requirements and consumer protection legislation which serve to add costs to meat and other food products traded across frontiers.

5. **Government Encouragements to Trading:** Under this heading, the 'barriers' to trade are more indirect. For example, an export refund or subsidy applied by a certain country may, in fact, increase its exports but at the expense of commercial exports of another country. State trading organizations which operate in East European countries to encourage exports with the objective of earning increased Western foreign exchange is another example of this type of measure.

From the five categories listed above, it can be seen that there are a multitude of measures which exist and which make international trade difficult and complex. The prevailing trend is for these measures to proliferate and become more complex despite the attempts of such bodies as the GATT, Codex Alimentarius and the International Office of Epizootics (OIE) to harmonize conditions in their respective areas.

There is also a suspicion that trade restrictions are introduced on somewhat dubious grounds; for example, measures introduced on animal health grounds which conveniently exclude some competitive imports. It is clear that real trade improvements can be negotiated only on an international basis and meat industry leaders should support efforts by the various international bodies concerned and ensure that their respective Governments take into account the world meat industry perspective.

THE EUROPEAN ECONOMIC COMMUNITY MEAT REGIMES

Before looking in detail at the EEC meat regimes and their implications for international trade, there are some general observations that should be made.

Although the EEC meat regimes do come in for much criticism, it should be emphasized that EEC expenditure in 1982 on the beef, sheep meat, pig meat and poultry sectors amounted to only 14 percent of the EEC agricultural budget. The same categories accounted for one-third of final agricultural production in the EEC. Livestock producers in the

EEC are among the most vociferous in their complaints about some of the other expenditure under the Common Agricultural Policy. Criticism from livestock producers is directed particularly at the level of spending on intervention buying and export refunds in the cereals sector which, in general, have maintained EEC cereals prices at exceptionally high levels. Moreover, expenditure on cereals amounted to 15 percent of the EEC budget in 1982 while cereals accounted for just 12 percent of final agricultural production.

Most of the criticism within the meat sector has been leveled at the EEC beef regime. The combination of the custom duties and levies result in an import charge of approximately \$1.80 per pound for boneless hindquarter beef entering the EEC as of November 1983. Furthermore, export refunds -- as applicable in 1983 -- result in heavily subsidized EEC beef exports to markets in the Middle East, North Africa and Eastern Europe. The EEC Reference Price for beef has remained below the Guide Price for almost 10 years so that high import levies and export refunds appear to be a permanent part of the system. The Reference Price is the average market price for cattle in the EEC and the EEC Guide Price is the support price at which level the Reference Price should (in theory) be if producers realize adequate returns.

There is a strong link between beef and dairy production in Europe with about 80 percent of the cows in the EEC being of a dairy or dual purpose breed. Thus the beef regime affects the incomes of 2.5 million farmers throughout the European Community as well as the incomes of those in the industries associated with beef and dairy production.

However, the EEC is not the most heavily protected beef market in the world -- the price of beef in Japan is testimony to that. Moreover, the animal health requirements of the EEC operate in a way that does allow beef imports from a much wider range of countries than is the case for North America or Japan.

Even more importantly, the EEC does allow substantial quantities of beef to be imported subject only to customs duties or subject to concessionary levies and duties. Indeed, about 425,000 tonnes of beef (carcase weight equivalent) are normally imported into the EEC under one or the other of these arrangements. Beef imports into EEC include:

- approximately 150,000 tonnes of processed beef products and cooked frozen beef. This quantity includes a large volume of South American corned beef as well as an increasing amount of other canned beef products particularly from Brazil. In addition there is the cooked frozen beef which is imported mainly for use in manufacturing. All this beef is imported subject only to a 26 percent customs duty which is bound within the GATT.
- 60,000 tonnes is the typical annual quantity set for imports into the EEC under the Balance Sheet scheme for manufacturing beef. Under this scheme, normally half the quantity is imported subject to the 20 percent customs duty only (this relates to products containing

a high proportion of beef); the remaining volume is imported subject to the 20 percent customs duty together with a reduced levy (which may not exceed 45 percent of the full levy).

- 65,000 tonnes is imported under the GATT quota for frozen beef and veal. This quota is shared between the EEC Member States, who are then responsible for the administration of their own share of the quota. The beef imported under this quota is subject only to customs duty and no levy is payable.
- 30,000 tonnes of beef can be imported into the EEC under the High Quality Cuts program. Under this arrangement, specific annual quantities are allocated to the United States, Argentina, Australia and Uruguay. The beef imported must be of an agreed quality and enters the Community subject only to the 20 percent customs duty. The 10,000 tonnes which has been allocated for the United States for quality beef exports to the EEC has never been fully utilized despite the major levy concession which is available.

Under the Lome Convention, the EEC grants a substantial concession to five African beef exporting countries - Botswana, Zimbabwe, Kenya, Madagascar and Swaziland. A total of 30,000 tonnes may be imported subject to no customs duties. The exporting country is required to apply 90 percent of the levy on export to the EEC and only the remaining 10 percent is applicable on entry. As a result of the animal health situation not all of this quota has been used.

Various other concessionary schemes also exist for importing cattle and beef into the EEC; these include special arrangements for importing cattle of alpine and mountain breeds, the balance sheet for young cattle imports and special arrangements for Yugoslavia. Altogether, these arrangements provide for an additional 90,000 tonnes of beef to enter the EEC without payment of the full levy.

Despite the wide range of the concessions to importers under the Beef Regime, there are still strong arguments in favor of further relaxation of constraints. For example, the EEC Guide Price appears to be fixed at an unrealistically high level. It is often argued that there is much to be said for the more widespread adoption of premium arrangements in various member states. Moreover, there is strong evidence that there could also be a better balance between supplies of beef suitable for retail sale and manufacturing beef in the EEC market.

The regimes for pigs and poultry are, in contrast with beef and veal, very 'light,' relying largely on external trade barriers only to provide support to EEC producer prices. In fact, the import levies and sluicgate prices which exist in the pig meat sector are simply a reflection of the relationship between EEC and world cereal prices.

In practice this has given EEC producers an added degree of protection. Import levies were charged on the assumption that EEC

producers have increasingly turned to cheaper feed alternatives such as maize gluten, manioc, oil cakes and meals. But most of these commodities still enter the EEC virtually free of customs duties and levies.

Thus it is not surprising that, despite the fairly effective barriers to trade, both from the point of view of import charges and other import requirements, consumption levels of poultry and pig meat have increased significantly over recent years. Over 40 percent of EEC meat consumption is currently in the form of pig meat and in West Germany pig meat consumption per capita, (125 pounds in 1982), is highest in the world.

The EEC sheep meat regime, which was introduced in 1980, provided for Voluntary Restraint Agreements with the major supplying countries. The agreed voluntary restraint levels reflected existing trade patterns between third countries and the EEC and also involved a substantial reduction in the rates of custom duties to 10 percent for live animals and meat. A review of the sheep meat regime is scheduled for the near future and it will be interesting to see what emerges from this.

The EEC significantly reduced customs duties on virtually all categories of offals under the last GATT negotiations. This has resulted in offals entering the EEC at very low customs duty rates. At present beef and pig livers enter the EEC subject to a customs duty of only 7 percent and most other categories are subject to a 4 percent duty. Sheep offals are charged only 3 percent. Over 200,000 tonnes of offals are imported into the EEC from third countries and this trade has tended to grow.

There is considerable concern with regard to the revised directive on third country trade in red meat and its implications for exports to the EEC. However, there has been extensive discussion between EEC veterinarians and those from the major third countries involved. Furthermore, the EEC is not seeking to impose standards on third countries which are more severe than those which are necessary for intra-community trade.

With regard to animal health and meat hygiene matters, it does need to be understood that the ten EEC countries have ten independent and often different animal disease situations and policies. This difference was particularly marked between the original 'six' and the United Kingdom, Irish Republic and Denmark. Thus it has been a difficult task to harmonize policies as opinions and situations vary within the EEC as they also vary between the EEC and countries outside the Community.

An example of this from the animal health standpoint is that of "blue tongue," a disease which is not present in the Community (with the exception of one Greek island). Therefore, to protect this status, imports into the EEC of live cattle are prohibited from countries such as the United States, where this disease is present. In the same way, most EEC member countries are not permitted to export live animals and unprocessed meat to North American due to the foot and mouth disease situation.

From the public health and hygiene policy standpoint, there is currently discussion within the Community regarding the use of hormonal agents for growth promotion. Already certain substances have been banned and there is pressure from consumer groups in some member countries to extend this ban to other hormonal substances, which could in turn have repercussions on third country suppliers. Another problem area is the required conditions for treatment of offals, where opinions differ between the Community and the authorities in the United States. At the same time slaughterhouses in Great Britain have found it very difficult to reach the standards necessary to enable them to export fresh meat to North America.

CHANGES IN THE COMMON AGRICULTURAL POLICY

There is much discussion about changes in the Common Agricultural Policy resulting from pressures on the EEC budget, the increasing influence of consumers and the threat of a trade war between the EEC and the United States. What implications might there be for the EEC meat regimes?

Before answering this question, however, we ought to take certain factors into consideration:

1. The meat regimes are not posing a great strain at present on the EEC budget. It is far more likely that budgetary factors will have implications for the cereals and milk regimes than for any of the meat regimes.
2. The likely enlargement of the EEC to include Spain and Portugal will increase the attention paid to the 'mediterranean products.' The reform of comparatively low cost meat regimes is not, therefore, likely to be a priority area for EEC decision makers. Another effect of enlargement is likely to be the fact that decision-making may well become even more difficult. This could well lead to greater flexibility in the running of the Common Agricultural Policy with greater discretion granted to member states to administer policies subject to agreed common financial restraints. However, any such change is bound to be gradual.
3. The major issues in the so called 'trade war' between the United States and the EEC are unlikely to be the red meat sectors. Dairy products and cereals will probably be the focal points of any dispute. Poultry meat is the only meat category on which there is likely to be a major conflict.

From the above comments, it can be seen that any major changes in the meat regimes are unlikely; any such adjustments will probably be gradual. Moreover, they seem more likely to result from internal pressures from within the member countries than from external influences.

With regard to specific changes in the regimes, it seems likely that for beef, export refunds will continue to be the major item of expenditure in the budget. However, there is

likely to be some attempt to make premium payments to producers in ways which do not provide indirect support to dairy farmers. No major change in the import regime is likely. It is unlikely that the current regime for sheep will change to a major degree, but we shall have to see what emerges from the review which is about to take place in Brussels. For pig meat and poultry meat, the regimes are expected to remain 'light' and to show comparatively little change. Nevertheless the proposed modifications to the operation of the cereals regimes and to the oil seeds sector do hold significant implications for the future developments in feed costs in the EEC.

The Community is going to be under strong pressure to ensure that EEC cereal prices are brought closer to world prices; in addition, it is expected to seek a limitation to the growth of cereals substitute imports, which would, in these circumstances, be permitted under the General Agreement on Tariffs and Trade, GATT (1). The EEC has already established voluntary restraint arrangements under GATT with the main suppliers of manioc and it is likely that it will look for similar arrangements with the principle suppliers of maize gluten and brans.

In the oil seeds sector the EEC is faced with a growing imbalance in the market for fats and oils which will be further exacerbated when Spain and Portugal join the Community, with the consequent increase in supplies of olive oil. To complement measures proposed for limiting growth in the dairy sector, it is proposed that a tax on consumption of oils and fats other than butter should also be introduced. This will undoubtedly have important implications for oil seed crushers' margins and could result in adjustments to the relative price structure of oils and oil cakes and meals.

CONCLUSIONS

1. Tariff and Non-tariff barriers have become increasingly important in the world meat trade in the 1980s. However, the effect of these measures has tended to change the direction of certain trade flows rather than reduce the volume of meat traded. International meat trade has tended to increase and at present almost 1 tonne in very 10 tonnes of meat produced enters world trade.
2. Meat policies in Western Europe and Japan have encouraged a growth in domestic meat production; and this has expanded the market for imported feed grains and soya.
3. It is unlikely that the situation is going to change very dramatically in the 1980s. Changes in the international meat situation are best brought about through international discussion and negotiation in such bodies as the GATT, Codex Alimentarius and OIE. Despite this, the recent discussions on beef and citrus products between the United States and Japan suggest that bilateral negotiation may assume greater importance in the 1980s. Within the EEC, the meat regimes are unlikely to change very markedly.

Mr. Oberst graduated from Cambridge University, spent many years in the British meat industry before assuming his present post as Director General of the British Meat and Livestock Commission. Mr. Bansback, a graduate of Newcastle University spent a year doing postgraduate studies at the Agricultural Economics Institute at Oxford University; he is the Meat and Livestock Commission's Deputy Chief Economist. The paper is adapted from a keynote speech made by Mr. Oberst at the World Meat and Livestock Congress in Nashville, Tennessee - June 1983.

Table 4. Prices for Beef and Pork in Selected Countries (1982).

	Beef	Pork
	-- --US \$ per 100 kg (a) -- --	
EEC	297	159
United States	264	145
Argentina	109	-
Australia	117	-
Japan	511	275

(a) Liveweight price converted into slaughter weight using standard conversion factors.

Source: FAO.

(1) See EEC Comm 500 (Bulletin of the EEC-Supplement 4/83)

Table 1. World Trade in Meat.

	1961-65	1966-70	1971-75	1978	1981	1982
	'000 tonnes					
World exports	3,994	4,953	6,475	9,339	14,252	14,200
of which: fresh/chilled and frozen						
Beef and veal	1,368	1,697	2,311	3,193	4,219	4,294
Mutton and lamb	509	634	698	773	846	955
Pork	305	387	907	1,184	1,510	1,646
Poultry	316	407	613	1,004	1,455	1,828
Other meat and offals	1,496	1,828	1,946	3,185	6,222	5,477
Beef and veal exports (a)	1,368	1,697	2,311	3,069	4,219	4,294
West Europe	376	568	878	1,201	1,765	1,746
of which: EEC-9 (b)	303	462	761	1,120	853	1,078
North America	26	35	48	83	188	102
Oceania	360	406	654	1,004	1,334	1,152
of which: Australia	243	276	462	773	1,117	926
South/Central America	521	580	547	625	706	755
of which: Argentina	392	356	221	350	329	373
Brazil	19	50	74	10	115	93
Uruguay	70	89	93	89	95	139
Europe/USSR	46	68	138	152	229	298

(a) fresh, chilled and frozen.

(b) includes intra EEC.

Source: FAO.

Table 2. World Trade in Coarse Grains, Oil Cakes and Meals.

	1961/62	1966/67	1971/72	1977/78		
Coarse Grains	1965/66	1970/71	1975/76	1979/80	1981/82	1982/83
	----- million tonnes -----					
World exports	35.2	43.0	67.6	89.4	102.0	100.0
of which from:						
EEC-9 (a)	na	3.6	2.6	3.7	4.4	4.4
other West Europe	0.4	1.0	0.8	0.9	1.0	0.7
Canada	1.1	1.8	3.8	4.1	7.8	7.5
United States	17.7	18.9	35.7	60.3	61.4	63.0
Argentina	3.9	6.2	6.7	9.6	13.7	12.5
Thailand	0.9	1.4	1.9	2.0	3.3	3.0
World imports	34.6	42.8	66.9	90.2	102.0	100.0
of which to:						
EEC-9 (a)	na	na	16.3	14.3	9.4	8.8
other West Europe	3.7	5.4	7.5	9.6	12.5	11.6
Japan	4.1	8.9	12.6	17.8	19.0	19.4
East Europe/USSR	1.0	2.5	9.5	23.8	30.9	27.5

(a) excludes intra-trade

na not available

Oil cakes and Meals	1961-65	1966-70	1973	1978	1981
	million tonnes (protein equivalent) (a)				
World exports	7.0	10.3	12.3	17.3	20.1
of which from:					
North America	na	na	7.3	10.2	11.6
South/Central America	na	na	2.2	5.1	6.6
World imports	6.6	9.5	12.2	17.6	20.2
of which to:					
EEC-9	5.9	8.1	6.1	8.5	9.0
Other West Europe			1.7	2.0	2.3
East Europe/USSR	na	na	1.8	2.7	3.4
South/Central America	na	na	0.2	0.7	1.1
Japan	na	na	1.7	1.7	1.9

(a) includes protein equivalent of oil seeds traded.

Source: FAO.

Table 3. World Trade and Production in Meat, Coarse Grains and Oil Cakes and Meals.

	1961-65			1982		
	Production (a)	Exports (b)	% (b/a)	Production a	Exports b	% (b/a)
	----- million tonnes -----					
Meat	68.0	4.0	5.9	140.0	14.0	10.0
Coarse grains	478.7	35.2	7.4	794.7	100.0	12.6
Oil cakes and meals(c)	17.8	7.0	39.3	47.0	24.0(d)	51.0

(c) includes oil seed protein equivalent.

(d) estimate.

Source: FAO.