



Submission No 11

Inquiry into Australia's Trade and Investment Relations with North Africa (Algeria, Egypt, Libya, Morocco, and Tunisia)

Organisation: Meat and Livestock Australia

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8 August 2005

Ms Kate Burton
Trade Sub-Committee Secretary
Joint Standing Committee on Foreign Affairs, Defence and Trade
Parliament House
Canberra ACT 2600

Via email: jscfadt@aph.gov.au

Trade and Investment Relations with North Africa

Dear Kate

I refer to the announcement dated 20 June 2005 regarding the inquiry by the Joint Standing Committee on Foreign Affairs, Defence and Trade into expanding Australia's trade and investment relations with the North African states of Algeria, Egypt, Libya, Morocco and Tunisia.

We note that the terms of reference require the Committee to review Australia's trade and investment relations with the region and to consider the likely future trends. As Meat & Livestock Australia's (MLA) focus is on red meat issues, our comments relate to this specific industry sector.

North Africa represents a relatively small but important market for Australian red meat and livestock. During 2004, Australia exported 134 tonnes of beef, 3,347 tonnes of lamb, 8,891 tonnes of mutton, and 409 tonnes of offal to the region. In total, these exports were valued at approximately A\$38.6 million. While there were no livestock exports to North Africa in 2004, Egypt and Libya have imported reasonable numbers of live cattle and sheep in prior years.

As the North African region is forecast to offer ongoing export opportunities for Australian red meat and livestock exports, our industry will continue to commit resources (particularly technical) in order to build demand for our products and to improve market access arrangements. These activities are primarily co-ordinated via MLA's representative office in Bahrain.

We have attached a submission outlining MLA's views on our trading relationship with North Africa. Please don't hesitate to contact Andrew McCallum (MLA's Manager - Trade Policy, Tel 02 9463 9153) should you require clarification of any of the issues raised in the attached document.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Dr Barnard', is written over a faint, light-colored signature line.

Dr Peter Barnard
General Manager
Economic, Planning and Market Services



Australia's Red Meat & Livestock Trade with North Africa

A Submission by Meat & Livestock Australia

This submission has been compiled by Meat & Livestock Australia (MLA) in response to the Joint Standing Committee on Foreign Affairs, Defence and Trade inquiry into expanding Australia's trade and investment relations with the North African states of Algeria, Egypt, Libya, Morocco and Tunisia.

MLA is a producer-owned company which provides services to the Australian beef, sheepmeat and goat meat industries. MLA adds value to this \$15 billion industry through the provision and delivery of innovative services and solutions designed to:

- improve market access;
- build demand via implementing targeted marketing programs; and
- develop a competitive advantage for our products via strategic research & development (R&D).

MLA is funded by:

- transaction levies paid on cattle, sheep and goat sales;
- Federal Government dollar-for-dollar funds for investment in R&D;
- cooperative contributions from individual processors, wholesalers, food service operators and retailers; and
- contributions by processor and live export industry bodies.

The views expressed in this paper are made solely by MLA, although are essentially representative of the broader industry position.

Key issues for the red meat and livestock industries regarding Australia's relationship with North Africa:

- North Africa is primarily a sheepmeat market for Australia offering prospects for ongoing import growth over the longer term. The region offers niche markets for beef.
- The region will remain an opportunistic market for Australian live stock exports - limited numbers are expected to be exported in the short term.
- Securing market access improvements by lowering existing tariff barriers and removing technical impediments to trade are industry priorities.
- The red meat industry has invested producer and exporter funds into strategic trade development activities in order to grow demand for Australian red meat products and livestock in the region. This commitment will continue.
- Industry sought and is subsequently very supportive of the Australian Government's technical / veterinary representation undertaken by the permanent Agriculture Counsellor based in Dubai (covering the Middle East and North Africa).
- Ongoing close consultation between the Australian Government and industry, especially with regard to technical market access issues, has helped realise some of the burgeoning market potential. Industry will continue to foster this relationship.

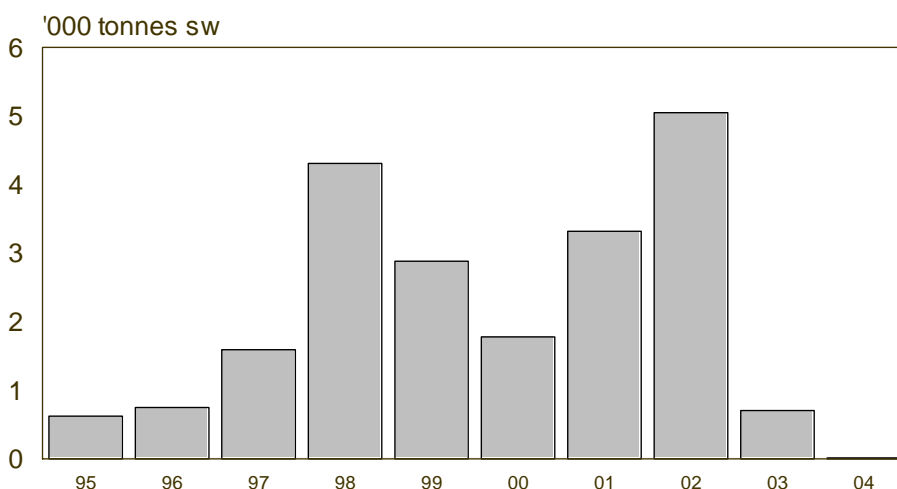
1. Australia's Red Meat and Livestock Trade with North Africa

1.1 Beef

The North African region is currently a relatively low volume market for Australian beef exports. In 2004 only 74 tonnes was shipped to Egypt and 60 tonnes to Algeria with zero volumes to other North African destinations. In total, this volume represented 0.01% of Australia's global beef exports (913,799 tonnes) in 2004. The continuing devaluation of the Egyptian pound, strong competition from other beef suppliers in North Africa, and high prices on offer in other export markets, (particularly Japan, Korea and the United States), were the key factors behind this performance.

At their height, export shipments exceeded 3,700 tonnes to Morocco in 2002 (destined for military use) and 1,700 tonnes to Libya in 1998, whilst volumes to Egypt exceeded 1,300 tonnes in 1999. Export tonnages in other years (1995-2004) and to other North African destinations have been considerably lower (Appendix A).

Australian beef exports to North Africa



Source: DAFF

North Africa has been a notoriously difficult market for Australian red meat exporters - due mostly to competitive pricing issues. The region, with relatively limited livestock farming resources and a large population, requires reasonable quantities of imported frozen beef, with the majority being sourced from low cost producers such as South America, China and occasionally India. As a consequence, the Australian beef industry tends to target the region with smaller quantities of higher quality product for the foodservice hotel sector.

1.2 Sheepmeat

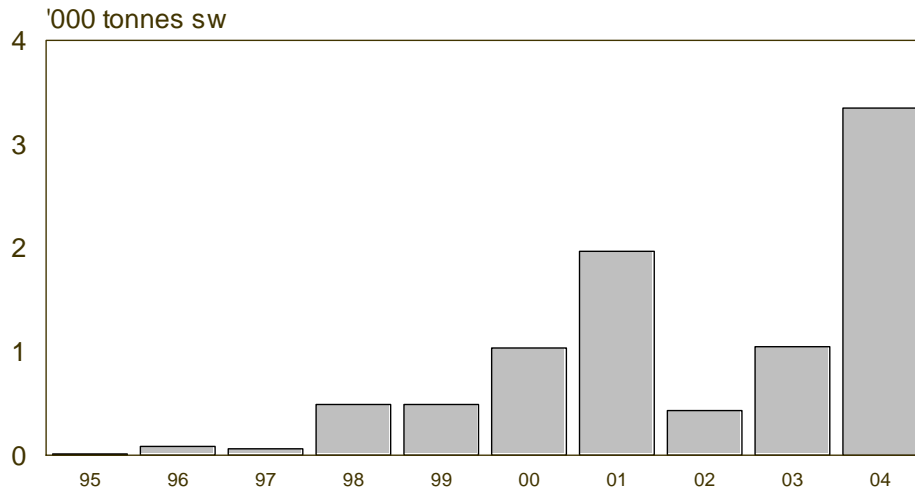
Algeria and Libya are the principal destinations for Australian sheepmeat (lamb and mutton) exports to North Africa, with these countries being pre-disposed to the consumption of sheepmeat.

For calendar year 2004, lamb exports ranged from zero (Tunisia) to 3,080 tonnes (Algeria) with the total volume amounting to 3,347 tonnes (Appendix A). This trade was valued at approximately A\$10.2 million.

Mutton is the more dominant export to the region with shipments totalling 8,891 tonnes, the main destinations being Algeria (5,338 tonnes) and Libya (3,300 tonnes). This volume represented 6.8% of Australia's global mutton exports (129,102 tonnes) during 2004 and was valued at approximately A\$25.6 million.

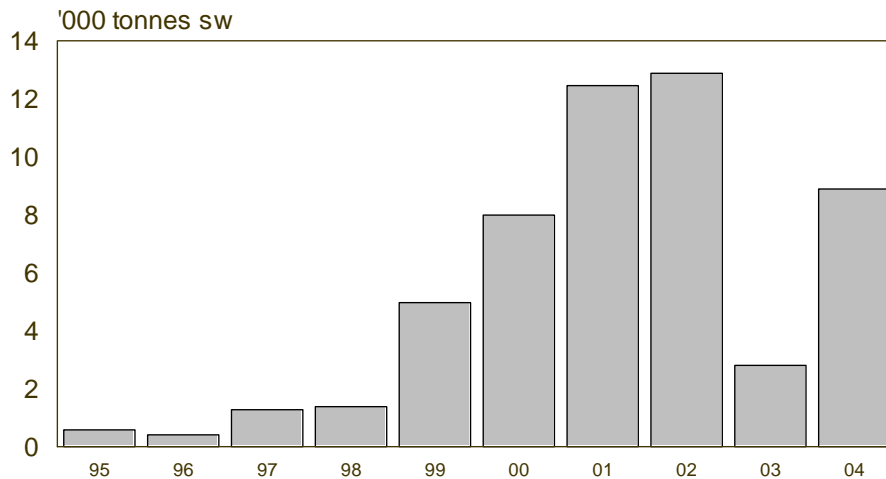
Demand for Australian mutton in North Africa is largely driven by its price and availability relative to other cheap protein sources (lower-grade beef, poultry and buffalo). The market, however, is extremely useful for the industry in maximising global sheepmeat returns.

Australian lamb exports to North Africa



Source: DAFF

Australian mutton exports to North Africa

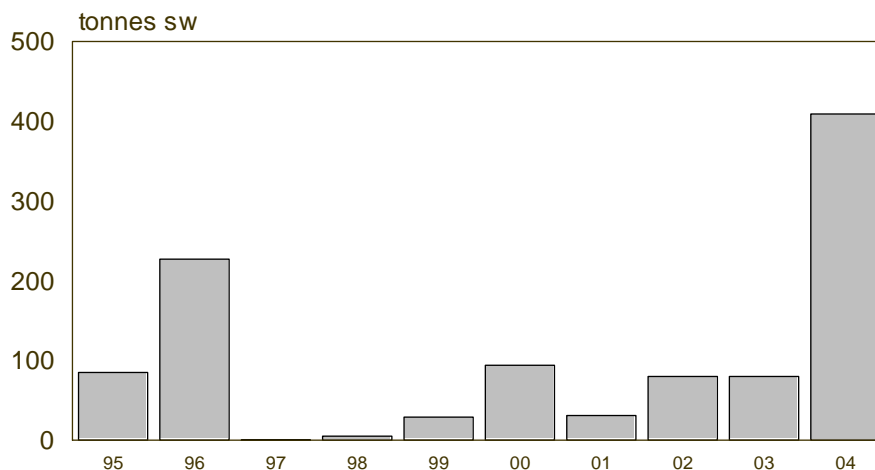


Source: DAFF

1.3 Offal

Offal exports to North Africa totalled only 409 tonnes (valued at A\$730,000) in 2004, Egypt being the main destination (Appendix A). Beef liver was the key item – favoured as it is a relatively cheap source of protein. The main suppliers are Brazil and Argentina with liver being traditionally sold by street vendors for sandwiches.

Australian offal exports to North Africa



Source: DAFF

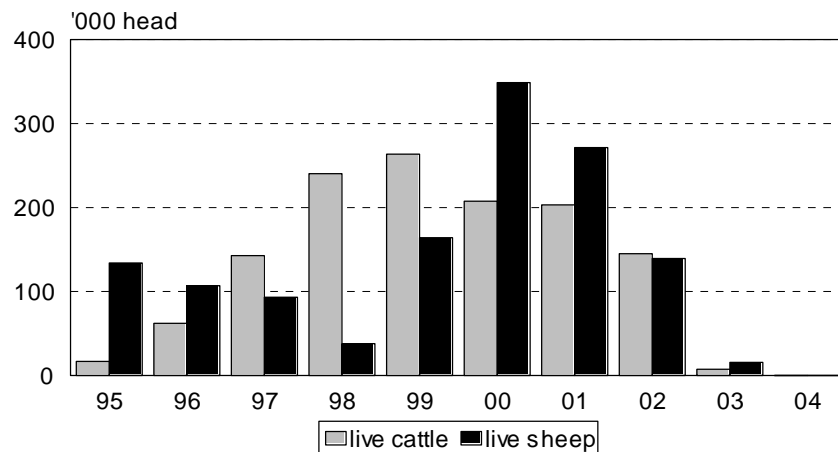
1.4 Livestock

Australia's live cattle trade with North Africa has been focused on two markets – Egypt and Libya.

Annual shipments to Egypt averaged 140,800 head over the 2000-2003 period, however, with the devaluation of the Egyptian pound and the severe shortage of foreign exchange, live cattle imports have become uncompetitive with local production. As a consequence, no Australian shipments were recorded in 2004 (Appendix B).

Libya was a fairly strong market in the late 1990's, however, this trade ceased due to finance restrictions (which are still ongoing) associated with the terrorism-related global trade sanctions introduced in the late 1980's.

Australian live cattle and live sheep exports to North Africa



Source: ABS

Egypt was also the key market for live sheep with exports averaging 193,800 head from 2000-2003, albeit declining in numbers in the latter years (Appendix B). For similar reasons to the live cattle trade, there were no live sheep shipments to Egypt in 2004.

Over the past decade, there have been no shipments of Australian livestock to Algeria, Morocco or Tunisia.

2. Market Access

MLA undertakes an ongoing trade advocacy program with a focus on ensuring existing rights of access for Australian red meat to international markets are at least maintained and where possible improvements to access conditions are secured. This necessitates uncovering and overcoming threats and barriers to entry as well as developing strategies to enhance market access opportunities.

As a major exporting sector, a change in access to overseas markets materially affects the profitability of individual producers and meat processors.

2.1 Overarching market access objective

- Unencumbered access for Australian beef, sheepmeat, goat meat, offal, processed red meat and livestock exports to the North African region.

2.2 Import tariffs

As a staunch supporter of free trade, the Australian red meat industry advocates the reduction of trade barriers in all markets. In particular, commercial opportunities will be enhanced if tariffs and non-tariff barriers are removed, while standards conformance and customs harmonisation will also be advantageous to the trading environment.

Importantly, trade liberalisation will facilitate reliable access to a wider range of products for end-users / consumers of our products.

Tariff barriers in several North African countries are extremely high (above 100%) which can have the effect of stifling trade.

The tariffs applicable to Australian beef in the region range from 5% or less in Egypt and Libya to 30% in Algeria, 100% in Tunisia and up to 239% in Morocco (Appendix C). Whilst the tariffs in Morocco are prohibitively high¹, product destined for military use enters Morocco duty free – a trade Australia participated in via tenders in 2000/01.

Sheepmeat and goat meat tariffs tend to mirror those applicable to beef with 5% or less applicable in Egypt and Libya to 30% in Algeria, 100% in Tunisia and up to 289% in Morocco (Appendix C).

As with the beef trade to Morocco, military tenders provide an opportunity for Australian exporters outside the restrictive tariff regime. An encouraging recent development has been the calling of a 2000-3000 tonne tender exclusively for Australian frozen lamb (July 2005).

The tariffs applicable to offal products range from 10%-40% in Egypt, 30% in Algeria, 43%-100% in Tunisia and 34%-239% in Morocco (Appendix C).

Imports of value-added, manufactured or preserved items are limited by high tariff rates.

Live exports have an advantage over meat products in some tariff lines (pure-bred animals in Algeria, Egypt, Libya and Morocco), although are equally as high in Tunisia (Appendix C).

The reduction of these tariffs, (amongst others outside North Africa), is an objective for the Australian red meat industry in the current World Trade Organization (WTO) Doha Round of trade talks.

MLA position

- ◆ A reduction in tariffs on unprocessed and processed beef, sheepmeat, goat meat, offal and livestock is an ongoing industry priority.
- ◆ Assessing the commercial opportunities and challenges of trade reform requires close consultation between industry and the Australian Government. Continuous dialogue is recommended.

2.3 Non-tariff barriers

There are a number of non-tariff barriers in the North African region which have the potential to disrupt or restrict trade.

In Egypt, for example, mandatory standards for a number of quality characteristics go beyond regulations imposed for health or safety reasons. These include:

- beef primal cuts must have a maximum 7% fat content;
- manufacturing beef can only include brisket and thin flank primal cuts, with a maximum 20% fat content;
- shelf life restrictions apply for smaller primal cuts (under 2kg) which have 3 months shelf life, while larger primal cuts have a 9 month shelf life limit;
- lamb must only be in carcase form with a shelf life of 6 months for frozen product; and
- lamb carcasses must have less than 7% fat content.

¹ It should be noted that under the recently signed Morocco-United States of America (US) Free Trade Agreement, the US secured significant preferential access for beef via tariff rate quotas of up to 4,000 tonnes for high quality beef and a further 2,000 tonnes for 'standard' beef. This places the US in a favourable position in terms of supplying the market into the future.

These regulations are unnecessary, are without scientific justification and severely restrict Australia's (and other country suppliers) ability to offer a range of products to Egyptian consumers. Despite efforts to work through these issues with Egyptian authorities (including efforts by Minister Vaile in hosting a Meat Forum in Egypt in June 2003), there has been no revision of these requirements to date.

In addition, across the region, new import regulations and administrative procedures are often developed and enforced without prior notice. Such regulations have the potential to be more trade-restrictive than necessary and thus time-consuming and costly to the Australian industry.

These include but are not limited to:

- ◆ hygiene / veterinary health certification and protocols;
- ◆ halal certification procedures;
- ◆ port of entry regimes / product testing / product detention / clearance and rejection procedures at customs checkpoints;
- ◆ changes to product expiry date regulations;
- ◆ commercial shipment issues; and
- ◆ lengthy (at times) dispute settlement procedures.

Transparency and consistency of application / enforcement of relevant regulations are the key requirements for 'smooth' trade flows.

MLA position

- ◆ The removal of non-tariff barriers which are not based on scientific justification, is strongly advocated.
- ◆ Communication channels, via ongoing dialogue between various government departments, should continue to be enhanced in order that future import regulations / proposed administrative procedures do not disrupt trade.

3. Food Regulations / Standards

Regulations governing food standards, food hygiene, food import and export and labelling requirements, while not currently restrictive for Australian products, are increasingly being tightened by Government agencies. Regulatory frameworks pertaining to the production, marketing and distribution of food products, including imported products, are also under constant review.

While MLA will assist industry via its monitoring of developments, an ongoing industry / Australian Government / North African agency partnership will be beneficial in ensuring compliance and effective operation of current and future food regulations.

MLA is therefore fully supportive of the Australian Government's presence in the North African market (via the Australian Embassies and Austrade in Cairo and Paris), and appreciates the assistance provided in developing the market potential to date.

MLA position

- ◆ Ongoing joint industry / Australian Government / North African government monitoring and consultation regarding new or enhanced food regulations is advocated.

4. Livestock Protocols

Export of all livestock, including genetic material (semen, embryos) operates via agreed bilateral health protocols with the industry's North African trading partners. However, maintaining agreed livestock protocols is often difficult, with some countries introducing unnecessary requirements (certification and / or tests) for livestock prior to export.

MLA position

- ◆ Ongoing liaison / discussions between the relevant Australian and North African government departments regarding protocols will enhance trading conditions.

5. MLA's Key Market Development / Marketing Activities

MLA implements market development programs in North Africa (on behalf of the Australian red meat and livestock industry) to build demand for our products. The focus is on the provision of technical assistance (product knowledge / handling and veterinary expertise) which is co-ordinated via MLA's representative office based in Bahrain.

5.1 Red meat market development activities

The key strategic elements of MLA's red meat market development activities are to:

1. further develop emerging market potential for Australian red meat and livestock; and
2. build a 'clean and safe image' of the Australian industry and highlight Halal integrity and the delicious and nutritious attributes of Australian red meat at retail, food service and trade levels.

Key activities in implementing these strategies include:

- liaising with veterinary authorities to ensure that Australia's Health and Halal Certification procedures are fully recognised;
- developing professional relationships with authorities, and thereby gain a greater understanding of the decision making processes;
- undertaking a review of non-tariff trade impediments for Australian red meat in the North African region during 2005/06;
- monitoring import / health standards and inspection processes and advising Australian industry;
- conducting trade and enduser awareness workshops covering product attributes;
- participating in targeted trade exhibitions;
- ongoing trade networking; and
- maintaining close collaboration with the Australian Embassies in Cairo and Paris (responsible for Algeria and Morocco) and Austrade (Cairo).

5.2 Livestock market development activities

The key strategic elements of MLA's livestock market development activities are to:

1. defend existing access conditions, and identify and action opportunities to improve access and veterinary protocols in the region;
2. improve demand for Australian livestock via quality improvements resulting from technical trade support; and
3. improve animal handling practices after Australian livestock arrive in the region.

Key activities in implementing these strategies include:

- cultivating trade and Government contacts to ensure early warning of any proposed changes to market access arrangements access and veterinary protocols, and provide a means of response to such proposals; and
- providing technical trade support, to improve the efficiency of transporting, handling, holding, and processing of Australian livestock.

MLA position

- ◆ The Australian industry is committed to optimising the potential for Australian red meat and livestock in the North African region.
- ◆ Close liaison and an ongoing working relationship with Australian Government agencies (AQIS, AFFA and DFAT) in both Canberra and the region as MLA implements business development activities will be necessary to ensure that the industry's interests in North Africa are advanced.

Appendix A

Australian Red Meat Exports to Algeria (tonnes shipped weight)

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Beef / veal	0	0	0	647	551	36	765	45	0	60
Lamb	0	0	0	151	56	96	97	373	1009	3080
Mutton	0	0	146	11	4072	6203	1933	215	1060	5338
Goat	0	0	0	0	0	0	0	0	0	0
Offal	0	214	0	0	0	0	0	0	0	0
TOTAL	0	214	146	810	4679	6336	2795	633	2069	8418

Source: Australian Government Department of Agriculture, Fisheries and Forestry

Australian Red Meat Exports to Egypt (tonnes shipped weight)

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Beef / veal	68	500	467	1029	1322	284	218	165	77	74
Lamb	13	77	14	48	226	155	126	37	21	23
Mutton	94	65	14	467	399	1203	345	82	129	252
Goat	0	0	0	0	0	0	0	0	0	0
Offal	39	0	0	5	29	94	20	0	80	363
TOTAL	214	642	495	1549	1976	1736	709	284	307	712

Source: Australian Government Department of Agriculture, Fisheries and Forestry

Australian Red Meat Exports to Libya (tonnes shipped weight)

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Beef / veal	556	251	1081	1722	939	1436	103	1126	628	0
Lamb	0	8	0	242	175	729	161	0	0	237
Mutton	473	346	1117	901	502	582	10176	12586	1615	3300
Goat	0	0	0	0	15	0	0	0	0	0
Offal	46	13	0	0	0	0	11	80	0	46
TOTAL	1075	618	2198	2865	1631	2747	10451	13792	2243	3523

Source: Australian Government Department of Agriculture, Fisheries and Forestry

Australian Red Meat Exports to Morocco (tonnes shipped weight)

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Beef / veal	0	0	45	878	71	23	2233	3711	0	0
Lamb	0	0	49	49	32	54	1581	22	17	7
Mutton	14	0	0	0	0	0	0	0	0	1
Goat	0	0	0	0	0	0	0	0	0	0
Offal	0	0	0	0	0	0	0	0	0	0
TOTAL	14	0	94	927	103	77	3814	3733	17	8

Source: Australian Government Department of Agriculture, Fisheries and Forestry

Australian Red Meat Exports to Tunisia (tonnes shipped weight)

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Beef / veal	0	0	0	31	0	0	0	0	0	0
Lamb	0	0	0	0	0	0	0	0	0	0
Mutton	0	2	0	0	0	0	0	0	0	0
Goat	0	0	0	0	0	0	0	0	0	0
Offal	0	0	0	0	0	0	0	0	0	0
TOTAL	0	2	0	31	0	0	0	0	0	0

Source: Australian Government Department of Agriculture, Fisheries and Forestry

Appendix B

Australian Livestock Exports to Egypt (head)

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Cattle	15,541	52,210	37,539	119,579	240,482	207,551	203,206	145,015	7583	0
Sheep	93,000	44,299	55,209	38,031	164,054	348,839	271,401	139,285	15,730	0
Goats	0	0	0	0	0	0	0	450	0	0

Source: Australian Bureau of Statistics

Australian Livestock Exports to Libya (head)

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Cattle	1298	10,007	105,257	120,717	23,115	0	0	0	0	0
Sheep	40,988	62,755	38,022	0	0	0	0	0	0	0
Goats	0	0	5	0	0	0	0	0	0	0

Source: Australian Bureau of Statistics

Note: There have been no shipments of Australian livestock to Algeria, Morocco or Tunisia.

Appendix C

Harmonized Tariff Schedule of Algeria Key Red Meat & Livestock Tariff Lines

Chapter 1: Live Animals

Heading / Sub-Heading	Article Description	Tariff
0102 Live bovine animals		
0102.10.00	Pure-bred breeding animals	5%
0102.90.00/90	Other	5% - 30%
0104 Live sheep		
0104.10.10	Pure-bred breeding animals	5%
0104.10.90	Other	30%
0104 Live goats		
0104.20.10	Pure-bred breeding animals	5%
0104.20.90	Other	30%

Chapter 2: Meat and Edible Meat Offal

Heading / Sub-Heading	Article Description	Tariff
0201 Meat of bovine animals, fresh or chilled		
0201.10.00	Carcasses and half-carcasses	30%
0201.20.00	Other cuts (bone-in)	30%
0201.30.00	Boneless	30%
0202 Meat of bovine animals, frozen		
0202.10.00	Carcasses and half carcasses	30%
0202.20.00	Other cuts (bone-in)	30%
0202.30.00	Boneless	30%
0204 Meat of sheep, fresh, chilled or frozen		
0204.10.00	Carcasses and half carcasses of lamb, fresh or chilled	30%
0204.21.00	Carcasses and half carcasses of other sheepmeat, fresh or chilled	30%
0204.22.00	Other sheepmeat cuts, fresh or chilled (bone in)	30%
0204.23.00	Other sheepmeat cuts, fresh or chilled (boneless)	30%
0204.30.00	Carcasses and half carcasses of lamb, frozen	30%
0204.41.00	Carcasses and half carcasses of other sheepmeat, frozen	30%
0204.42.00	Other sheepmeat cuts, frozen (bone in)	30%
0204.43.00	Other sheepmeat cuts, frozen (boneless)	30%
0204 Meat of goats, fresh, chilled or frozen		
0204.50.00	Meat of goats	30%

Harmonized Tariff Schedule of Algeria

Chapter 2, Meat and Edible Meat Offal (cont.)

Heading / Sub-Heading	Article Description	Tariff
0206 Edible offal, fresh, chilled or frozen		
0206.10.00	Bovine offal fresh or chilled	30%
0206.21.00	Bovine tongues, frozen	30%
0206.22.00	Bovine livers, frozen	30%
0206.29.00	Bovine – other, frozen	30%
0206.80.00	Other edible offal (sheep or goats), fresh or chilled	30%
0206.90.00	Other edible offal, frozen	30%
0210 Meat and edible offal, salted, in brine, dried or smoked		
0210.20.00	Meat of bovine animals	30%
0210.99.00	Other	30%

Chapter 16: Preparations of Meat

Heading / Sub-Heading	Article Description	Tariff
1601 Sausages and similar products, of meat, meat offal or blood; food preparations based on these products		
1601.00.00	Sausages	30%
1602 Other prepared or preserved meat, meat offal or blood		
1602.10.00	Homogenised preparations	30%
1602.20.10	Of liver of any animal	30%
1602.20.90	Other	30%
1602.50.00	Of bovine animals	30%
1602.90.00	Other, including preparations of blood	30%
1602.90.90	Other	30%
1603 Extracts and juices of meat		
1603.00.10/20	Meat extracts and meat juices	30%

Source: International Customs Tariffs Bureau - Algeria 2003

Harmonized Tariff Schedule of Egypt

Key Red Meat & Livestock Tariff Lines

Chapter 1: Live Animals

Heading / Sub-Heading	Article Description	Tariff
0102 Live bovine animals		
0102.10.00	Pure-bred breeding animals	5%
0102.90.00	Other	5%
0104 Live sheep		
0104.10.10	Pure-bred breeding animals	5%
0104.10.90	Other	5%
0104 Live goats		
0104.20.10	Pure-bred breeding animals	5%
0104.20.90	Other	5%

Chapter 2: Meat and Edible Meat Offal

Heading / Sub-Heading	Article Description	Tariff
0201 Meat of bovine animals, fresh or chilled		
0201.10.00	Carcasses and half-carcasses	5%
0201.20.00	Other cuts (bone-in)	5%
0201.30.00	Boneless	5%
0202 Meat of bovine animals, frozen		
0202.10.00	Carcasses and half carcasses	5%
0202.20.00	Other cuts (bone-in)	5%
0202.30.00	Boneless	5%
0204 Meat of sheep, fresh, chilled or frozen		
0204.10.00	Carcasses and half carcasses of lamb, fresh or chilled	5%
0204.21.00	Carcasses and half carcasses of other sheepmeat, fresh or chilled	5%
0204.22.00	Other sheepmeat cuts, fresh or chilled (bone in)	5%
0204.23.00	Other sheepmeat cuts, fresh or chilled (boneless)	5%
0204.30.00	Carcasses and half carcasses of lamb, frozen	5%
0204.41.00	Carcasses and half carcasses of other sheepmeat, frozen	5%
0204.42.00	Other sheepmeat cuts, frozen (bone in)	5%
0204.43.00	Other sheepmeat cuts, frozen (boneless)	5%
0204 Meat of goats, fresh, chilled or frozen		
0204.50.00	Meat of goats	5%

Harmonized Tariff Schedule of Egypt

Chapter 2, Meat and Edible Meat Offal (cont.)

Heading / Sub-Heading	Article Description	Tariff
0206 Edible offal, fresh, chilled or frozen		
0206.10.00	Bovine offal fresh or chilled	5%
0206.21.00	Bovine tongues, frozen	5%
0206.22.00	Bovine livers, frozen	5%
0206.29.00	Bovine – other, frozen	5%
0206.80.00	Other edible offal (sheep or goats), fresh or chilled	5%
0206.90.00	Other edible offal, frozen	5%
0210 Meat and edible offal, salted, in brine, dried or smoked		
0210.20.00	Meat of bovine animals	40%
0210.99.00	Other	40%

Chapter 16: Preparations of Meat

Heading / Sub-Heading	Article Description	Tariff
1601 Sausages and similar products, of meat, meat offal or blood; food preparations based on these products		
1601.00.00	Sausages	30%
1602 Other prepared or preserved meat, meat offal or blood		
1602.50.00	Of bovine animals	30%

Source: MLA / WTO Tariff Schedule

Harmonized Tariff Schedule of Libya

Key Red Meat & Livestock Tariff Lines

Chapter 1: Live Animals

Heading / Sub-Heading	Article Description	Tariff
0102 Live bovine animals		
0102.10.00	Pure-bred breeding animals	0%
0102.90.00/90	Other	0%
0104 Live sheep		
0104.10.10	Pure-bred breeding animals	0%
0104.10.90	Other	0%
0104 Live goats		
0104.20.10	Pure-bred breeding animals	0%
0104.20.90	Other	0%

Chapter 2: Meat and Edible Meat Offal

Heading / Sub-Heading	Article Description	Tariff
0201 Meat of bovine animals, fresh or chilled		
0201.10.00	Carcases and half-carcasses	NA
0201.20.00	Other cuts (bone-in)	NA
0201.30.00	Boneless	NA
0202 Meat of bovine animals, frozen		
0202.10.00	Carcasses and half carcasses	NA
0202.20.00	Other cuts (bone-in)	NA
0202.30.00	Boneless	NA
0204 Meat of sheep, fresh, chilled or frozen		
0204.10.00	Carcasses and half carcasses of lamb, fresh or chilled	NA
0204.21.00	Carcasses and half carcasses of other sheepmeat, fresh or chilled	NA
0204.22.00	Other sheepmeat cuts, fresh or chilled (bone in)	NA
0204.23.00	Other sheepmeat cuts, fresh or chilled (boneless)	NA
0204.30.00	Carcasses and half carcasses of lamb, frozen	NA
0204.41.00	Carcasses and half carcasses of other sheepmeat, frozen	NA
0204.42.00	Other sheepmeat cuts, frozen (bone in)	NA
0204.43.00	Other sheepmeat cuts, frozen (boneless)	NA
0204 Meat of goats, fresh, chilled or frozen		
0204.50.00	Meat of goats	NA

Harmonized Tariff Schedule of Libya

Chapter 2, Meat and Edible Meat Offal (cont.)

Heading / Sub-Heading	Article Description	Tariff
0206 Edible offal, fresh, chilled or frozen		
0206.10.00	Bovine offal fresh or chilled	NA
0206.21.00	Bovine tongues, frozen	NA
0206.22.00	Bovine livers, frozen	NA
0206.29.00	Bovine – other, frozen	NA
0206.80.00	Other edible offal (sheep or goats), fresh or chilled	NA
0206.90.00	Other edible offal, frozen	NA
0210 Meat and edible offal, salted, in brine, dried or smoked		
0210.20.00	Meat of bovine animals	NA
0210.99.00	Other	NA

Official Libyan Tariff Schedules were unavailable at the time of preparing this document.

Recent press reports (July 2005) indicate that Libya has recently eliminated import duties on 3500 tariff lines in a move to liberate the country's economy. The tariffs are to be replaced by a 4% service import tax.

Harmonized Tariff Schedule of Morocco

Key Red Meat & Livestock Tariff Lines

Chapter 1: Live Animals

Heading / Sub-Heading	Article Description	Tariff
0102 Live bovine animals		
0102.10.00	Pure-bred breeding animals	2.5%
0102.90.00	Other	218.5%
0104 Live sheep		
0104.10.10	Pure-bred breeding animals	2.5%
0104.10.90	Other	289%
0104 Live goats		
0104.20.10	Pure-bred breeding animals	2.5%
0104.20.90	Other	289%

Chapter 2: Meat and Edible Meat Offal

Heading / Sub-Heading	Article Description	Tariff
0201 Meat of bovine animals, fresh or chilled		
0201.10.00	Carcasses and half-carcasses	239%
0201.20.00	Other cuts (bone-in)	239%
0201.30.00	Boneless	239%
0202 Meat of bovine animals, frozen		
0202.10.00	Carcasses and half carcasses	239%
0202.20.00	Other cuts (bone-in)	239%
0202.30.00	Boneless	239%
0204 Meat of sheep, fresh, chilled or frozen		
0204.10.00	Carcasses and half carcasses of lamb, fresh or chilled	289%
0204.21.00	Carcasses and half carcasses of other sheepmeat, fresh or chilled	289%
0204.22.00	Other sheepmeat cuts, fresh or chilled (bone in)	289%
0204.23.00	Other sheepmeat cuts, fresh or chilled (boneless)	289%
0204.30.00	Carcasses and half carcasses of lamb, frozen	289%
0204.41.00	Carcasses and half carcasses of other sheepmeat, frozen	289%
0204.42.00	Other sheepmeat cuts, frozen (bone in)	289%
0204.43.00	Other sheepmeat cuts, frozen (boneless)	289%
0204 Meat of goats, fresh, chilled or frozen		
0204.50.00	Meat of goats	289%

Harmonized Tariff Schedule of Morocco

Chapter 2, Meat and Edible Meat Offal (cont.)

Heading / Sub-Heading	Article Description	Tariff
0206 Edible offal, fresh, chilled or frozen		
0206.10.00	Bovine offal fresh or chilled	34%
0206.21.00	Bovine tongues, frozen	34%
0206.22.00	Bovine livers, frozen	239%
0206.29.00	Bovine – other, frozen	34%
0206.80.00	Other edible offal (sheep or goats), fresh or chilled	34%
0206.90.00	Other edible offal, frozen	34%
0210 Meat and edible offal, salted, in brine, dried or smoked		
0210.20.00	Meat of bovine animals	239%
0210.90.00	Other	239%

Chapter 16: Preparations of Meat

Heading / Sub-Heading	Article Description	Tariff
1601 Sausages and similar products, of meat, meat offal or blood; food preparations based on these products		
1601.00.00	Sausages	34%
1602 Other prepared or preserved meat, meat offal or blood		
1602.10.00	Homogenised preparations	34%
1602.20.10	Of liver of any animal	34%
1602.20.90	Other	34%
1602.50.00	Of bovine animals	34%
1602.90.00	Other, including preparations of blood	34%
1602.90.90	Other	34%
1603 Extracts and juices of meat		
1603.00.10/20	Meat extracts and meat juices	34%

Source: WTO Tariff Schedule / Morocco Tariff Schedule 2003

Harmonized Tariff Schedule of Tunisia

Key Red Meat & Livestock Tariff Lines

Chapter 1: Live Animals

Heading / Sub-Heading	Article Description	Tariff
0102 Live bovine animals		
0102.10.00	Pure-bred breeding animals	150%
0102.90.00	Other	76-80%
0104 Live sheep		
0104.10.10	Pure-bred breeding animals	180%
0104.10.90	Other	180%
0104 Live goats		
0104.20.10	Pure-bred breeding animals	180%
0104.20.90	Other	180%

Chapter 2: Meat and Edible Meat Offal

Heading / Sub-Heading	Article Description	Tariff
0201 Meat of bovine animals, fresh or chilled		
0201.10.00	Carcasses and half-carcasses	75%
0201.20.00	Other cuts (bone-in)	75%
0201.30.00	Boneless	75%
0202 Meat of bovine animals, frozen		
0202.10.00	Carcasses and half carcasses	100%
0202.20.00	Other cuts (bone-in)	100%
0202.30.00	Boneless	100%
0204 Meat of sheep, fresh, chilled or frozen		
0204.10.00	Carcasses and half carcasses of lamb, fresh or chilled	100%
0204.21.00	Carcasses and half carcasses of other sheepmeat, fresh or chilled	100%
0204.22.00	Other sheepmeat cuts, fresh or chilled (bone in)	100%
0204.23.00	Other sheepmeat cuts, fresh or chilled (boneless)	100%
0204.30.00	Carcasses and half carcasses of lamb, frozen	100%
0204.41.00	Carcasses and half carcasses of other sheepmeat, frozen	100%
0204.42.00	Other sheepmeat cuts, frozen (bone in)	100%
0204.43.00	Other sheepmeat cuts, frozen (boneless)	100%
0204 Meat of goats, fresh, chilled or frozen		
0204.50.00	Meat of goats	180%

Harmonized Tariff Schedule of Tunisia

Chapter 2, Meat and Edible Meat Offal (cont.)

Heading / Sub-Heading	Article Description	Tariff
0206 Edible offal, fresh, chilled or frozen		
0206.10.00	Bovine offal fresh or chilled	43%
0206.21.00	Bovine tongues, frozen	43%
0206.22.00	Bovine livers, frozen	43%
0206.29.00	Bovine – other, frozen	43%
0206.80.00	Other edible offal (sheep or goats), fresh or chilled	100%
0206.90.00	Other edible offal, frozen	100%
0210 Meat and edible offal, salted, in brine, dried or smoked		
0210.20.00	Meat of bovine animals	180%
0210.99.00	Other	180%

Source: WTO Tariff Schedule

ends