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Poultry and Products

Annual

2000

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Report Highlights:

Low prices, partly due to the dioxin crisis, led to more concentration in the sector but tempered further expansion of the production capacity. Optimism returned to the egg sector.

Includes PSD changes: Yes

Includes Trade Matrix: Yes

Annual Report

The Hague [NL1], NL

Table of Contents

Executive Summary	2
Poultry Meat	4
Production	4
Consumption	7
Trade	7
Prices	11
Policy and Marketing	11
Eggs	13
Production	13
Consumption	14
Trade	14
Prices	15
Policy and Marketing	16

Executive Summary

Poultry Meat

During the past five decades, poultry production has grown almost continuously. During 1999, production of broilers rose 1997/1998 by 1.5 percent to 675,000 MT, driven by profitability. In 1999, however, low price levels for broilers restrained further expansion of the production capacity. In 1999/2000, the number of broilers decreased from 53.2 million to 52.5 million (on a total of 104.8 million chickens). In 1998, the stock of turkey declined from 1.50 million to 1.44 million and a further decline is expected during 2000. The production of turkey meat stabilized at 29,400 MT.

The per capita consumption of poultry meat decreased by 0.4 kg to 21.4 kg. This drop, the first since 1975, is due to the Belgian dioxin crisis and price competition with pork. Imports of broilers (whole, meat and products) rose nearly 30 percent to 132,000 MT. Due to the dioxin crisis, large amounts of low priced broilers were imported from Belgium and re-exported. During the past five years, imports of turkey (whole, meat and products) stabilized at about 71,000 MT.

To guarantee product quality, the poultry sector puts a lot of effort in the IKB (Integrated Quality Control) system. Nearly 100 percent of the poultry meat sector and about 75 percent of the laying sector is IKB certified. With the IKB system, the Product Board can guide farmers and industry regarding medicine use, labeling etc.

Eggs

Good financial results in 1997/1998 led to an expansion of egg production capacity in 1999. The number of layer hens and production of eggs increased nearly 2 percent to 31.4 million and 10.8 billion (9.7 million for human consumption), respectively. During 1999, the price level of eggs declined and discouraged further production expansion. However, midway through 2000, prices for eggs rose significantly to levels comparable to 1997 and the number of layer hens rose to 32.8 million.

As a result of the dioxin crisis in Belgium, Dutch exporters were able to compete with low prices on the world market. Over the whole year 1999, both imports and exports of eggs and egg products increased to a record of 1.8 billion and 8.7 billion pieces, respectively. Major increases were reported for imports of shell eggs for human consumption (32 percent to 1.13 billion) and for fluid, frozen and cooked (49,800 MT) and dried protein (8,500 MT).

Conversion rates:

1997 US\$ 1.00 = Dfl. 1.89, **1998** US\$ 1.00 = Dfl. 2.03, **1999** US\$ 1.00 = Dfl. 2.07,

2000 US\$ 1.00 = Dfl. 2.32 (average June 2000)

Acronyms used in Report	
Dutch or German	English
CBS = Centraal Bureau voor de Statistiek	Central Bureau for Statistics
DEP = Stichting Duurzame Energieproductie Pluimveehouderij	Association Sustainable Energy Production Poultry Farming
GGE = Gute Gemeinschaft Eier (German)	Good Community Eggs
IKB = Integraal Ketenbeheer	Integrated Quality Control
KAT = Controle Alternatieve Tierhaltungsformen (German)	Control Alternative Animal Farming
LEI = Landbouw Economisch Instituut	Agricultural Economic Institute
NOP = Nederlandse Organisatie Pluimveehouderij	Dutch Association of Poultry Farmers
Stichting Natuur en Milieu	Foundation Nature and Environment

Poultry Meat

Production

During the past five decades, poultry production, predominantly broilers, showed an almost continuous and linear growth. In 1999, production of poultry meat grew by 2.2 percent to 758,000 MT (more than 1 million MT basis live weight).

PSD Table						
Country	Netherlands					
Commodity	Plty, Meat, Chicken -16 wks			(1000 MT)(MIL HEAD)		
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Inventory (Reference)	0	0	0	0	0	0
Slaughter (Reference)	0	0	0	0	0	0
Beginning Stocks	0	7	7	0	8	0
Production	666	675	667	670	0	665
Whole, Imports	13	16	12	20	0	20
Parts, Imports	92	116	90	125	0	125
Intra EC Imports	86	107	86	110	0	110
Other Imports	0	0	0	0	0	0
TOTAL Imports	105	132	102	145	0	145
TOTAL SUPPLY	771	814	776	815	8	810
Whole, Exports	109	72	108	65	0	55
Parts, Exports	397	485	397	490	0	495
Intra EC Exports	328	357	328	360	0	365
Other Exports	0	0	0	0	0	0
TOTAL Exports	506	557	505	555	0	550
Human Consumption	258	257	263	260	0	260
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	258	257	263	260	0	260
TOTAL Use	764	814	768	815	0	810
Ending Stocks	7	0	8	0	0	0
TOTAL DISTRIBUTION	771	814	776	815	0	810
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

PSD Note: The figures of the production, trade, and consumption are provided by the Product Board of Livestock and Meat. The Central Bureau for Statistics (CBS) is the source of the livestock census.

PSD Table						
Country	Netherlands					
Commodity	Poultry, Meat, Total				(1000 MT)(MIL HEAD)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Inventory (Reference)	0	0	0	0	0	0
Slaughter (Reference)	0	0	0	0	0	0
Beginning Stocks	14	14	37	5	13	0
Production	745	758	745	745	0	745
Whole, Imports	15	17	10	25	0	25
Parts, Imports	219	238	215	240	0	245
Intra EC Imports	199	235	192	240	0	245
Other Imports	0	0	0	0	0	0
TOTAL Imports	234	255	225	265	0	270
TOTAL SUPPLY	993	1,027	1,007	1,015	13	1,015
Whole, Exports	100	79	100	55	0	50
Parts, Exports	496	603	529	610	0	615
Intra EC Exports	409	415	415	425	0	430
Other Exports	0	0	0	0	0	0
TOTAL Exports	596	682	629	665	0	665
Human Consumption	360	340	365	350	0	350
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	360	340	365	350	0	350
TOTAL Use	956	1,022	994	1,015	0	1,015
Ending Stocks	37	5	13	0	0	0
TOTAL DISTRIBUTION	993	1,027	1,007	1,015	0	1,015
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

PSD Note: The figures of the production, trade, and consumption are provided by the Product Board of Livestock and Meat. The Central Bureau for Statistics (CBS) is the source of the livestock census.

PSD Table						
Country	Netherlands					
Commodity	Poultry, Meat, Turkey				(1000 MT)(MIL HEAD)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Inventory (Reference)	0	0	0	0	0	0
Slaughter (Reference)	0	0	0	0	0	0
Beginning Stocks	2	2	6	0	9	0
Production	32	29	33	27	0	27
Whole, Imports	1	1	1	1	0	1
Parts, Imports	68	70	68	72	0	75
Intra EC Imports	60	70	60	65	0	65
Other Imports	0	0	0	0	0	0
TOTAL Imports	69	71	69	73	0	76
TOTAL SUPPLY	103	102	108	100	9	103
Whole, Exports	1	1	1	1	0	1
Parts, Exports	52	60	53	64	0	62
Intra EC Exports	38	36	40	40	0	42
Other Exports	0	0	0	0	0	0
TOTAL Exports	53	61	54	65	0	63
Human Consumption	44	41	45	35	0	40
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	44	41	45	35	0	40
TOTAL Use	97	102	99	100	0	103
Ending Stocks	6	0	9	0	0	0
TOTAL DISTRIBUTION	103	102	108	100	0	103
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

PSD Note: The figures of the production, trade, and consumption are provided by the Product Board of Livestock and Meat. The Central Bureau for Statistics (CBS) is the source of the livestock census.

In 1999, production of broiler meat rose by 1.5 percent to 675,000 MT (838,000 MT basis live weight). This growth is a result of the expansion of the production capacity during the last half of 1998 driven by good profits. Production volume per farm increased by 9 percent. In 1999, the number of issued building permits were substantially lower in than in 1998. In May 2000, the CBS (Central Bureau of Statistics) census revealed a broiler stock of 52.5 million, a decline of about 700,000 animals compared with May 1999.

The total stock of chickens, including roosters, in 1999 was 104.77 million:

-brood stock for broilers younger than 18 weeks:	3.25 million
-brood stock for broilers older than 18 weeks:	5.80 million
-broilers	53.25 million
-layer hens younger than 18 weeks:	11.04 million
-layer hens between 18 weeks and 20 months:	28.94 million

-layer hens older than 20 months: 2.48 million

During the past ten years, the stock of turkey grew from 1.00 million to 1.44 million and production (basis live weight) increased from 37,900 MT to 54,000 MT. However, production of turkey meat stabilized at around 29,000 MT. A quarter of the Dutch production is exported alive to slaughterhouses in Germany. In 1998, the stock of turkey declined from 1.50 million to 1.44 million and a further decline is expected during 2000.

Consumption

In 1999, the per capita consumption of poultry meat decreased 0.4 kg to 21.4 kg. This drop, the first since 1975, is due to the Belgian dioxin crisis and price competition with pork. Consumption of broiler (16.2 kg) and turkey (2.6 kg) declined while consumption of other poultry such as duck and guinea fowl became more popular. Because of their convenience, poultry breast products are still growing and account for 40 percent of the total sales volume.

Trade

Import

In 1999, imports of poultry meat increased 11 percent to 255,000 MT. More than 50 percent is usually imported from Belgium or Germany. About 10 percent is imported from outside the EU, predominantly Brazil and Thailand.

Between 1993 and 1998, imports of broilers (whole, meat and products) stabilized at about 100,000 MT. In 1999, imports rose nearly 30 percent to 132,000 MT. After removal of Belgian export restrictions, due to the dioxin crisis, large amounts of low priced broilers were imported from Belgium. Last year imports of chicken consisted of: whole chicken, 15,800 MT, and parts, 106,500 MT. Major increases in imports were reported for chicken wings (9,200 MT in 1999) and breasts with bone (20,200 MT in 1999), probably both for barbecue purposes.

During the past five years, imports of turkey (whole, meat and products) stabilized at about 70,000 MT (71,000 MT in 1999). A large part (about 40 percent) of Dutch turkey imports are re-exported to other EU destinations. Last year imports of turkey consisted of: whole turkey, 700 MT, and parts, 23,700 MT. Major increases in imports were reported for wings, 4,700 MT in 1999.

Export

In 1999, exports of poultry meat rose about 8 percent to a new record of 682,000 MT. Meat delicacies and preparations had the largest export growth (10 percent) to 63,000 MT. The Dutch export growth can partly be explained by restricted Belgian supply and low prices during the dioxin crisis. Growth of foreign sales were reported in Belgium (restricted domestic supply), UK (mainly poultry filets), and Russia where the market slightly recovered. Exports of poultry meat to third countries declined with 15 percent attributable to the surplus on the world market.

Import Trade Matrix			
Country	Netherlands		
Commodity	Plty, Meat, Chicken -16 wks		
Time period	CY	Units:	Metric Tons
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
E.U.	84,751	E.U.	107,109
- Germany	31,816	- Germany	37,956
- U.K.	16,155	- U.K.	13,836
- Belgium/Lux	26,269	- Belgium/Lux	44,915
- France	4,234	- France	3,599
Thailand	9,717	Thailand	6,296
Brazil	6,726	Brazil	6,984
Hungary	733	Hungary	732
Total for Others	101,927		121,121
Others not Listed	806		1,178
Grand Total	102,733		122,299

Export Trade Matrix			
Country	Netherlands		
Commodity	Plty, Meat, Chicken -16 wks		
Time period	CY	Units:	Metric Tons
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
E.U.	329,771	E.U.	357,313
- Germany	210,131	- Germany	197,151
- U.K.	60,863	- U.K.	90,516
- Belgium/Lux	27,179	- Belgium/Lux	27,985
Russia	45,498	Russia	65,088
Ukraine	19,699	Ukraine	7,149
Hong Kong	20,796	Hong Kong	26,013
China	16,019	China	12,415
Bosnia-Herz.	13,176	Bosnia-Herz.	6,634
Malaysia	5,112	Poland	7,561
Total for Others	450,071		482,173
Others not Listed	86,769		86,988
Grand Total	536,840		569,161

Trade Matrices Note: Chicken meat is inclusive broilers, hens and cocks and exclusive meat preparations.

Import Trade Matrix			
Country	Netherlands		
Commodity	Poultry, Meat, Total		
Time period	CY	Units:	Metric Tons
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
E.U.	109,154	E.U.	136,874
- Germany	39,561	- Germany	47,763
- U.K.	20,575	- U.K.	18,695
- Belgium/Lux	28,280	- Belgium/Lux	46,844
- France	13,205	- France	14,196
- Italy	1,695	- Italy	3,865
Thailand	9,717	Thailand	6,309
Brazil	6,726	Brazil	6,984
Total for Others	125,597		150,167
Others not Listed	1,670		1,998
Grand Total	127,267		152,165

Export Trade Matrix			
Country	Netherlands		
Commodity	Poultry, Meat, Total		
Time period	CY	Units:	Metric Tons
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
E.U.	381,599	E.U.	414,771
- Germany	241,958	- Germany	228,712
- U.K.	67,677	- U.K.	99,889
- Belgium/Lux	37,176	- Belgium/Lux	38,287
Russia	52,065	Russia	75,648
Hong Kong	21,206	Hong Kong	26,427
Ukraine	20,527	Ukraine	7,540
China	16,295	China	12,795
Bosnia-Herz	13,252	Bosnia-Herz	6,664
Ghana	4,602	Ghana	10,452
Total for Others	509,546		554,297
Others not Listed	97,357		94,228
Grand Total	606,903		648,525

Trade Matrices Note: Poultry meat is exclusive meat preparations.

Import Trade Matrix			
Country	Netherlands		
Commodity	Poultry, Meat, Turkey		
Time period	CY	Units:	Metric Tons
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
E.U.	19,614	E.U.	23,689
- France	7,260	- France	7,225
- Germany	6,146	- Germany	8,195
- U.K.	4,275	- U.K.	4,338
- Italy	609	- Italy	1,592
- Belgium/Lux	727	- Belgium/Lux	1,552
Israel	19	Israel	1
Chile	-	Chile	20
Total for Others	19,633		23,710
Others not Listed	11		0
Grand Total	19,644		23,710

Export Trade Matrix			
Country	Netherlands		
Commodity	Poultry, Meat, Turkey		
Time period	CY	Units:	Metric Tons
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
E.U.	33,205	E.U.	35,272
- Germany	23,141	- Germany	22,191
- Belgium/Lux	9,256	- Belgium/Lux	9,576
Russia	6,337	Russia	10,468
Benin	614	Benin	1,931
Liberia	506	Liberia	1,629
Togo	348	Togo	1,367
Eq. Guinee	1,059	Eq. Guinee	1,043
Gabon	786	Gabon	911
Ghana	463	Ghana	689
Total for Others	43,318		53,310
Others not Listed	7,251		3,100
Grand Total	50,569		56,410

Trade Matrices Note: Turkey meat is exclusive meat preparations and whole turkey.

Prices

In 1999, the price level of broilers (per kg live weight Dfl. 1.57 in 1998 and Dfl. 1.36 in 1999) was negatively influenced by the large supply from the U.S. and Brasil and price competition with pork. Another negative factor was the dioxin crisis in Belgium. After the release of the accumulated stock in Belgium, the price dropped significantly. During the first half of 2000, prices showed an upwards trend and the forecasts are moderately optimistic.

According to the Dutch Agricultural and Economic Institute (LEI), the family income for Dutch broiler farms declined from Dfl. 110,000 in 1997/1998 to Dfl. 50,000 per year in 1998/1999 (Dfl. 34 per 1,000 kg product). The LEI predicted a yearly loss of Dfl. 5,000 per family (minus Dfl. 50 per 1,000 kg product) for the 1999/2000 season.

Policy and Marketing

- The Product Boards for Livestock, Meat and Eggs developed, in cooperation with the government and other agricultural organizations, the Integrated Quality Control (IKB) system. With the IKB system, the Product Boards can require or persuade farmers and industry to follow instructions regarding medicine use, labeling etc. The feed industry (Dutch and foreign) must follow a Good Manufacturing Practice (GMP), veterinarians must operate according to a Good Veterinarian Practice (GVP) and slaughterhouses must apply a Good Hygienic Practice (GHP).

Currently, about 75 percent of the laying sector (IKB Egg) and nearly 100 percent of the poultry meat sector (IKB Chicken and IKB Turkey) are certified. The Product Boards of Livestock, Meat and Eggs believes that the total export volume of the sector can be maintained if their production emphasizes quality. In correspondence with the IKB system, the multinationals Cebeco, Cehave and Nutreco are reorganizing to control the production system from reproduction to the slaughtering.

- In July 2000, the Minister of Public Health, Els Borst, proposed to introduce mandatory labeling of all poultry meat with the warning: "Let op, dit product bevat ziekmakende bacteriën." ("Warning, this product contains pathogenic bacteria."). The warning continues with advice on how to prepare the poultry meat hygienically. The legislation is a result of a 3-year old agreement of the sector to lower the Salmonella and Campylobacter infection to 10 and 15 percent, respectively. This year, a test on chicken filets conducted by the Dutch Consumers Organization revealed that 13 percent was contaminated with Salmonella and 42 percent with Campylobacter. The European Union prohibits companies to treat poultry with chlorous water or lactic acid (this is permitted in the U.S.).

- The Minister of Agriculture, Laurens Brinkhorst, plans to prosecute poultry farmers who supply broilers contaminated with antibiotics. Regulations are based on the minimum allowed period between administration of the medicine and slaughtering. The Minister made his statement as a reaction to the Dutch Consumers Organization (de Consumentbond) announcement that 10 percent of the chicken breast filets are contaminated with antibiotics. The Product Board for Poultry and Eggs is studying the possibility of limiting usage of the antibiotic doxycyclin.

- The Dutch poultry sector is planning to burn about 1,000,000 MT of poultry manure per year for energy production. The emission of nitrogen oxides will be limited (gas treatment will be applied) and the ash will be used as fertilizer. The Foundation Nature and Environment states that the energy production from manure is polluting and claims that the primary reason for the manure surplus is the large size of the poultry stock.

Eggs

Production

PSD Table						
Country	Netherlands					
Commodity	Poultry, Eggs					
					(MIL HEAD)(MIL PCS)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Layers	30	31	29	31	0	30
Beginning Stocks	0	0	0	0	0	0
Production	10,650	10,771	10,600	11,000	0	10,500
Hatch Eggs, Imports	60	61	55	62	0	64
Shell Eggs, Imports	840	1,129	840	1,100	0	1,100
Other Imports	350	626	350	500	0	500
Intra EC Imports	1,140	1,713	1,150	1,500	0	1,500
TOTAL Imports	1,250	1,816	1,245	1,662	0	1,664
TOTAL SUPPLY	11,900	12,587	11,845	12,662	0	12,164
Hatch Eggs, Exports	200	186	200	200	0	200
Shell Eggs, Exports	5,810	6,591	5,815	6,600	0	6,000
Other Exports	2,210	1,933	2,210	2,110	0	2,260
Intra EC Exports	6,720	4,443	6,700	5,000	0	5,000
TOTAL Exports	8,220	8,710	8,225	8,910	0	8,460
Hatch Eggs, Consumption	640	890	640	800	0	750
Shell Eggs, Human	3,000	2,943	2,920	2,900	0	2,900
Shell Eggs, OT. Use/Loss	40	44	60	52	0	54
Other Dom. Consumption	0	0	0	0	0	0
Total Dom. Consumption	3,680	3,877	3,620	3,752	0	3,704
TOTAL Use	11,900	12,587	11,845	12,662	0	12,164
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	11,900	12,587	11,845	12,662	0	12,164
Calendar Yr. Imp. from U.S.	3	1	3	1	0	1

PSD Note: The figures of the production, trade, and consumption are provided by the Product Board of Livestock and Meat. The Central Bureau for Statistics (CBS) is the source of the livestock census.

In 1998, the number of building licenses issued increased and, as a result, egg production capacity expanded in the following year. The stock of layer hens, older than 18 months, increased from 30.8 million to 31.4 million during 1999. In 1999, however, the egg sector lost money and the number of building licenses decreased significantly. Optimism has returned and, in May 2000, the stock of layer hens was at 32.8 million.

During the past decade, production of eggs fluctuated around 10 billion per year. In 1999, production of eggs increased slightly 1.6 percent to 10.8 billion. Production of eggs for human consumption remained at about 9.7 billion per year. The production share of alternative egg production (free-range systems) grew from 18 percent to 20 percent.

Consumption

In 1999, the per capita consumption of eggs was 180, two more than in 1998. This rise is attributable to the institutional use and the consumption of convenience products. Household consumption of eggs decreased 2 percent. Household purchases of free-range eggs rose, probably as a result of the dioxin crisis. Currently, the share of free-range eggs is 44 percent of the total.

Trade

Import

In the middle of 1999, imports of eggs declined because of the dioxin crisis (Belgium is the main supplier of eggs to the Dutch market). Still, over the entire year, imports of eggs and egg products increased more than 40 percent to 1.8 billion pieces. Major increases were reported for fluid, frozen and cooked (49,800 MT) and dried protein (8,500 MT). Also, imports of shell eggs for human consumption grew significantly, 32 percent, to 1.13 billion.

Export

In 1999, exports of eggs and egg products reached a record of 8.7 billion pieces. During the first quarter of 1999, Dutch exporters were able to compete with low prices (dioxin crisis) on the world market. However, at mid 1999, exports were temporary hampered by a lack of purchases from German retailers on account of the dioxin crisis. Exports of shell eggs for human consumption were about 6.6 billion pieces.

Import Trade Matrix			
Country	Netherlands		
Commodity	Poultry, Eggs		
Time period	CY	Units:	Metric Tons
Imports for:	1998		1999
U.S.	1,455	U.S.	524
Others		Others	
E.U.	798,553	E.U.	1,095,057
- Belgium/Lux	431,851	- Belgium/Lux	667,241
- Germany	271,150	- Germany	320,198
- U.K.	61,678	- U.K.	28,319
- Spain	22,814	- Spain	30,106
- France	7,596	- France	44,880
Czech Rep.	2,718	Czech Rep.	19,198
Israel	32,341	Israel	12,241
Thailand	17,137	Thailand	-
China	1,026	China	597
Total for Others	851,775		1,127,093
Others not Listed	3,057		1,659
Grand Total	856,287		1,129,276

Export Trade Matrix			
Country	Netherlands		
Commodity	Poultry, Eggs		
Time period	CY	Units:	Metric Tons
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
E.U.	4,764,752	E.U.	4,301,334
- Germany	4,054,213	- Germany	3,510,587
- Belgium/Lux	400,577	- Belgium/Lux	243,013
- U.K.	95,585	- U.K.	204,319
Hong Kong	354,735	Hong Kong	376,932
Angola	152,273	Angola	88,925
Switzerland	99,004	Switzerland	92,485
U. Arab. Emir.	150,904	U. Arab. Emir.	258,163
Oman	117,041	Oman	148,499
Kuwait	36,266	Kuwait	85,034
Total for Others	5,674,975		5,351,372
Others not Listed	155,607		204,468
Grand Total	5,830,582		5,555,840

Trade Matrices Note: Poultry eggs in matrix are shell eggs exclusive hatch eggs.

Prices

In 1999, over supply in Europe resulted in a further decline of egg prices. In September 1999, prices improved nearly to the level in September 1998, but still about Dfl. 0.50 per kg lower than the level in 1997 (about Dfl. 1.80 per kg). Especially the eggs meant for the German market, price carriage paid to the German border, was under pressure because of preference of German consumers for domestic production. March 2000, prices improved significantly. Reasons for this recovery are the production decline in Europe and outbreak of aviaire influenza in Italy. Currently, July 2000, the price per kg is more than Dfl. 1.60 per kg, comparable with the level in July 1997.

According to the Dutch Agricultural and Economic Institute (LEI) the family income for Dutch egg farms declined from Dfl. 140,000 in 1997/1998 to a loss of Dfl. 20,000 per year in 1998/1999 (minus Dfl. 0.80 per layer hen). The LEI predicted a yearly loss of Dfl. 70,000 per family (minus Dfl. 3.00 per layer hen) in 1999/2000 which will result in a serious deterioration of their financial position. Currently, the price level of eggs increased and the forecast is more optimistic.

Policy and Marketing

- Beginning January 1, 2012, battery production of eggs must be restricted to half of the production. The goal is based on an agreement, made in 1999, of the Dutch Association of Poultry Farmers (NOP) and environmental and animal welfare conscious organizations and was incited by EU legislation. Three systems are available: enhanced cages (“verrijkte kooien”), aviaries (“volières”) and free-range farming systems. The poultry farmers are skeptical. Major obstacles for introduction of this systems are increase of aggression and cannibalism under the hens, lack of control over ammonia emission and hygiene (more antibiotics are needed), high labor intensity and the specialistic knowledge needed. Furthermore, poultry farmers stated that the EU legislation is not conclusive and will be evaluated in 2005.

-Beginning September 1, 2000, free-range eggs for the German market and inspected by KAT (Control Alternative Animal Farming) must be labeled with the name of the farm. The German inspection body for regular eggs, Good Community Eggs (GGE), is considering the origin labeling. Currently, only egg boxes are labeled with the name of the farm. About 50 percent of the Dutch egg exports are destined to the German market.

- Information regarding Integrated Quality Control see Chapter: Poultry meat.
- Information regarding Good Manufacturing Practices see Chapter: Poultry meat.