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Report Highlights: The EU is on the verge of possibly seeing significant changes in the livestock sector resulting from farmers' reaction to the Midterm Review, the Russian TRQ announcement, this summer's heat wave and the imminent accession of 10 new member states. The EU could also for the first time see beef imports higher than exports as consumption is increasing and competitively priced beef imports are finding there way onto the EU market. Swine imports are low, and are expected to remain low in 2003 on into 2004.

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TABLE OF CONTENTS

- EXECUTIVE SUMMARY 2
- CATTLE 3
- BEEF 5
- SWINE 7
- PORK 9
- POLICY 10
  - BSE CLASSIFICATION 11
  - BSE TESTING. 11
  - FMD 11
  - ANIMAL WELFARE. 11
  - TRADE IN SEMEN. 11
  - ANIMAL BY PRODUCTS. 12
  - FOOD HYGIENE. 12
  - HORMONES. 12
- OTHER RELATED REPORTS. 13

EXECUTIVE SUMMARY

The EU is on the verge of possibly seeing significant changes in the livestock sector resulting from 4 main factors. First, farmer's outlook for the 2004/2005 marketing year as they begin to react to the Midterm Review Agreement reached in July of this year. Reform includes changes in decoupling of payments, use of set-a-side land, and special premium that will all impact the livestock sector. Secondly, EU farmers will have to find ways to compensate for the January 2003 announcement by Russia of its tariff rate quota, which is expected to limit imports of beef, pork and poultry. The Russian TRQ announcement could also impact EU exports to Russia and Japan. Thirdly, EU farmers will have to deal with the drought caused by this summer's heat wave. The EU does not currently have statistics on the effects the drought has had on the livestock sector, however the French, German, Austrian, and Italian governments have requested drought assistance from the Commission. EU Agriculture Commissioner Fischler indicated 2 measures have already been taken to assist member states affected by the drought: (1). Allowing animals in the areas effected by the drought to graze on set a side land and (2). A new tender for the sale in Germany and France to be used as animal feed in Italy. Other options open to the Commission could ultimately contribute to the cost of transport from the place of storage to the place of need for intervention and some form of advance of the CAP direct aid payments in order to ease cash flow problems. Finally, the accession of 10 new member states in 2004 will transform previous extra-EU trade figures into intra-EU trade figures.

CATTLE

Country	European Union					
Commodity	Animal Numbers, Cattle		(1000 HEAD)			
	Revised	2002	Preliminary	2003		2004
	Old	New	Old	New	Old	New
Market Year Begin	01/2002		01/2003			01/2004
Total Cattle Beg. Stocks	80448	80184	79819	78944	0	78081
Dairy Cows Beg. Stocks	20475	20488	20050	20157	0	19880
Beef Cows Beg. Stocks	13112	13085	12940	12988	0	12997
Production (Calf Crop)	28185	27149	27570	27070	0	26958
Extra EC Imports	500	458	485	501	0	507
TOTAL SUPPLY	109133	107791	107874	106515	0	105546
Extra EC Exports	235	249	250	253	0	260
Cow Slaughter	7136	7070	6890	6847	0	6718
Calf Slaughter	5741	5538	5650	5456	0	5432
Total Slaughter	26600	26643	26400	26464	0	26253
Loss	2479	1955	2224	1717	0	1708
Ending Inventories	79819	78944	79000	78081	0	77325
TOTAL DISTRIBUTION	109133	107791	107874	106515	0	105546

Source: FAS EU-15 Post Information

Note: Figures for Austria are have been revised thus effecting beginning and ending numbers. Additionally there are slight changes in 2002 import and export figures as new data has become available.

During the 2002 marketing year there was a decline in the EU cattle herd. This decline resulted from a further decline in dairy herds as a result of greater milk production efficiencies as well as a decline in French cattle numbers to qualify for extensification payments. However the decline was not as severe as previously expected, as UK cattle numbers increased slightly more than originally expected because the sector is still recovering from the FMD outbreaks of 2001.

In 2003, cattle numbers are estimated to be slightly higher than previously forecast due to a smaller decline in dairy cow numbers, especially in Belgium, as and as a result of the inclusion of data from Austria. The decline shown also reflects a downward revision in French cattle numbers. The continuing trend however is long-term reduction in cattle numbers mainly as a result of lower dairy cow numbers.

EU cattle imports are expected to increase in 2003 especially into the Netherlands and Germany.

EU cattle exports are expected to show only slight increases in 2003 to traditional markets for EU cattle (mainly Lebanon, Middle Eastern countries and northern African countries). As fewer countries are willing to take EU cattle due to disease concerns (particularly BSE concerns), this has resulted in EU exporting countries competing against one-another for the remaining markets.

The number of cattle slaughtered in 2003 is a little higher than originally expected however shows a decline from 2002 levels. The decline in slaughter is especially low in Ireland.

Overall EU Ending inventories for 2003 and 2004 are expected to show a decline from earlier forecasts, although Spanish cattle numbers are expected to increase along with UK cattle numbers. These increases however are not predicted to be large enough to compensate for decreases in other member states.

The market year for 2004 is expected to reflect several changes as result of the Mid Term Review (MTR) and the 2003 summer drought. However the MTR is not expected to impact the 2004 production cycle. Overall EU calf production is forecast to decline mainly as a result of lower dairy cow numbers.

Live exports are forecast to increase marginally in 2004. In the UK the anticipated abolishment of the OTM scheme could have a significant impact on the UK beef market.

Cattle calf crop production (EU and top 3 member states)-000' head

	2003	2004
Total EU	27,070	26,958
France	6,570	6,460
Germany	4,862	4,780
Italy	3,000	3,030
Other Member States	12,638	12,688

EU cattle slaughter data (EU and top 3 member states)- 000' head

	2003	2004
Total EU	26,464	26,253
France	5,670	5,530
Italy	4,446	4,513
Germany	4,140	4,050
Other Member States	12,208	12,160

EU Cattle exports (EU and top 3 member states) – '000 head

	2003	2004
Total EU	253	260
Germany	100	100
France	85	85
Ireland	40	40
Other Member States	28	35

BEEF

Country	European Union				
Commodity	Meat, Beef and Veal				(1000 MT CWE) (1000 HEAD)
	Revised	2002	Preliminary	2003	Forecast	2004
	Old	New	Old	New	Old	New
Market Year Begin						
Slaughter (Reference)	26600	26640	26400	26464	0	26253
Beginning Stocks	302	249	260	204	0	30
Production	7400	7456	7260	7360	0	7330
Extra EC Imports	490	417	520	460	0	480
TOTAL SUPPLY	8192	8122	8040	8024	0	7840
Extra EC Exports	510	480	530	430	0	380
TOTAL Domestic Use	7422	7438	7410	7564	0	7460
Ending Stocks	260	204	100	30	0	0
TOTAL DISTRIBUTION	8192	8122	8040	8024	0	7840

Source: FAS EU-15 Post Information

Note: Beginning-of-Year and End-of-Year 2002 beef stocks have been revised in accordance with the latest official EU Commission statistics. The figures in the table have been converted to carcass weight equivalent (CWE). Finally, stock figures reflect EU private storage aid stock only. Commercial stocks are included under" total domestic use".

Due to the EU Commission target to eliminate stocks over the current year, Total 2003 year-end-stocks have been reduced in the table, however given the current EU price trends, it is expected that some beef will remain in the current year-end stocks. High 2004 beef prices are expected to finally enable the depletion of EU intervention beef.

Total EU beef production in 2002 indicates revisions in the table reflecting higher-than-anticipated 2002 slaughter numbers. Increased production was accompanied by an increase in average slaughter weight, which was derived from the killing of large numbers of adult animals maintained on the farm, primarily in France and Belgium. This event was aided through extensification premiums.

Due to an estimated reduction in 2003 cattle slaughter numbers, EU beef production will be reduced from 2002 levels. First-quarter 2003 production statistics show a slowdown in production for most member states. Another reduction in EU-15 beef production is forecasted for 2004 resulting from the effects of additional reductions in cattle activity levels in the Union.

Total EU beef imports in 2002 have also been revised downward to reflect the latest EU official trade data. EU-15 beef imports are expected to increase significantly in 2003, surpassing for the first time the level of EU beef exports. The larger imports will be due to higher levels of beef imported from South America (primarily Argentina, Uruguay and Brazil), under the EU beef GATT quota. Beef imports from CEEC origins will also tend to trend upward over the current year. Most of the EU imports of Argentine beef will be directed into Germany, while Uruguayan beef will tend to be primarily imported into Spain. Significant quantities of African-origin beef is expected to be displaced in the UK market as a result of more competitively priced South American beef.

In 2004 total beef imports into the EU-15 are forecast to increase. The increase in imports is encouraged by lower internal production and increased domestic beef prices. For the same reasons the total level of imports will be limited by the EU's strict import quota regime. However, due to high domestic beef prices, it is expected that some beef imports will be able to enter the EU-15 under the GATT quota limits, at full EU import tariffs.

Exports of EU beef have been revised downwards to reflect the latest EU official trade statistics. Major EU beef exports come mainly from Ireland, Germany and Spain, and are primarily exported to Russia. Large quantities of German beef (15,000 MT) were exported to Korea at the beginning of 2002 from the Special Purchase Scheme to North Korea as food-aid.

Affected by the appreciation of the Euro, total EU-15 beef exports are estimated to drop significantly during 2003. EU beef sales into Russia under the Russian beef TRQs are expected to largely displace the aggressively marketed Brazilian beef. At the same time it is anticipated that the EU will continue to feel the effects of the competitiveness of the Ukraine, which remains un-bound by the Russian TRQ regime. Germany will see the largest impact of trade losses in the EU as first quarter 2003 German beef sales into Russia officially report a 30% decrease from first quarter 2002 levels. Spain is reported to have remained competitive with larger first quarter 2003 beef exports to Russia for the same period in 2002. Due to the shorter market supply forecast for 2004, total EU-15 beef exports will also tend to be reduced.

Total Domestic Consumption is expected to continue its upward trend in 2003. This could result in the total domestic consumption surpassing EU-15 beef production levels. The increase in domestic consumption can be attributed to consumers regaining confidence in beef, combined with increased imports from third countries. Furthermore, total domestic use reflects consumption as well as commercial stocks, and will also reflect increases as total domestic use is directly linked to the EU's intervention stocks policy.

A moderate reduction in EU-15 domestic beef use is anticipated in 2004. This is primarily due to anticipated shortages in the beef market in the coming year. The shortage results from a combination of lower beef outputs, strict EU trade barriers and the 2003 summer drought. The combination of these factors is expected to result in high internal EU beef prices in 2004. This could in tern result in other cheaper meats (primarily pork and poultry) being substituted for beef.

EU Beef production (EU and top 3 member states) –'000 MT

	2003	**2004**
Total EU	7,360	7,330
France	1,555	1,540
Germany	1,260	1,240
Italy	1,178	1,196
Other Member States	3,367	3,354

EU Beef consumption data (EU and top 3 member states) –'000 MT

	2003	**2004**
Total EU	7,564	7,460
France	1,650	1,630
Italy	1,421	1,442
UK*	1,095	1,094
Other Member States	3,398	3,294

**UK surpassed Germany slightly*

EU Beef exports (EU and top 3 member states) –'000 MT

	2003	**2004**
Total EU	430	380
Germany	95	80
Ireland	150	150
Italy	50	50
Other Member States	135	100

SWINE

Country	European Union					
Commodity	Animal Numbers, Swine				(1000 HEAD)	
	Revised	2002	Preliminary	2003	Forecast	2004
	Old	New	Old	New	Old	New
	Report	Report	Report	Report	Report	Report
Market Year Begin					01/2004	
TOTAL Beginning Stocks	121,315	122,191	121,026	121,462	0	121,000
Sow Beginning Stocks	11,694	11,694	11,680	11,417	0	11,380
Production (Pig Crop)	214,000	216,360	213,750	215,000	0	215,300
Extra EC Imports	36	1	40	0	0	0
TOTAL SUPPLY	335,351	338,552	334,816	336,462	0	336,300
Extra EC Exports	108	101	120	90	0	100
Sow Slaughter	4,411	4,450	4,400	4,350	0	4,330
Total Slaughter	204,210	204,387	204,100	204,300	0	204,600
Loss	10,007	12,602	9,596	11,072	0	10,600
Ending Inventories	121,026	121,462	121,000	121,000	0	121,000
TOTAL DISTRIBUTION	335,351	338,552	334,816	336,462	0	336,300

Source: FAS EU-15 Post Information

In 2002 and 2003 sow beginning stocks continue the decreasing trend. The decline in sow numbers in recent years is expected to stop as the environmental and animal welfare adjustment programs (primarily in the Netherlands and Belgium) are ending. The termination of these programs should result in the stabilization of sow numbers, although in 2004, sow beginning stocks are forecast to show a slight decline. Despite the decrease in sow stocks, pig crop production increased as a result of improved sow productivity. A slight increase in pig crop is expected in 2004 due to improved sow productivity. This is in line with the natural trend of improved sow productivity.

Overall EU production is expected to decline, reflecting the lower sow crop. The decline is, however, relatively small in relation to the decline in sow stocks. This is explained by improved sow productivity in the UK and Spain. In 2002, pig crop production in the UK was negatively affected by *Postweaning Multisystemic Wasting Syndrome (PMWS*). PMWS causes wasting in piglets, however the UK is showing sow productivity returning to normal levels.

Swine imports were low in 2002. EU swine exports also remained at low levels, and are expected to remain low in 2003 on into 2004. Most EU swine exports are sent to Eastern Europe.

The total slaughter figure in 2003 is expected to be lower due to the lower pig crop. Sow slaughter will likely stabilize in 2004 while total slaughter is forecast to increase marginally due to increased pig crop. No drastic changes in total slaughter are expected over the next few years.

Overall EU ending inventories are forecast to decline, particularly in Germany and the Netherlands. Germany is facing a downward trend in stocks after having reached a peak. The decrease in the Netherlands is explained by the environmental and animal welfare restrictions mentioned above. The Dutch government wants to reduce inventories to 10 million head and continue this trend for a few more years. In 2004 ending inventories are expected to be stable although there are forecast to be regional variations. Expected increases in the UK, Denmark, Spain and Italy are not expected to be enough to compensate for the previously mentioned declines. The expected reduction in inventories is forecast to show a downward trend in the overall EU swine cycle.

EU Pig Crop production (EU and top 3 member states) –'000 Head

	2003	**2004**
Total EU	215,000	215,300
Germany	43,292	43,250
Spain	38,350	38,500
France	26,824	27,100
Other Member States	106,534	106,450

EU Pig slaughter data (EU and top 3 member states) –'000 Head

	2003	**2004**
Total EU	204,300	204,600
Germany	44,800	44,500
Spain	37,700	37,750
France	26,830	26,970
Other Member States	94,970	95,380

EU Pig exports (EU and top 3 member states) –'000 Head

	2003	**2004**
Total EU	90	100
Germany	30	30
Netherlands	40	50
Austria	12	15
Other Member States	8	5

PORK

Commodity	Pork				(1000 MT CWE)(1000 HEAD)	
	Revised	2002	Preliminary	2003	Forecast	2004
	Old	New	Old	New	Old	New
Market Year Begin	01/2002		01/2003		01/2004	
Slaughter (Reference)	204,210	204,387	204,100	204,300	0	204,600
Beginning Stocks	0	0	0	30	0	0
Production	17,800	17,825	17,820	17,850	0	17,900
Extra EC Imports	60	54	60	60	0	60
TOTAL SUPPLY	17,860	17,879	17,880	17,940	0	17,960
Extra EC Exports	1,300	1,175	1,325	1,000	0	960
TOTAL Domestic Use	16,560	16,674	16,555	16,940	0	17,000
Ending Stocks	0	30	0	0	0	0
TOTAL DISTRIBUTION	17,860	17,879	17,880	17,940	0	17,960

Source: FAS EU-15 Post Information

EU pork production during 2003 is expected to increase slightly due to increased slaughter and higher than average slaughter weight. After the 2003 summer heat wave slaughter weights have declined in most of the EU-15 countries by 10%. This trend is expected to continue into 2004.

EU imports of pork are expected to increase slightly, remaining in line with previous forecasts.

EU exports in 2002 reveal that Denmark, the largest EU-15 exporter of pork, exported 243,000 MT to Japan, 54,000 MT to the U.S., and 65,000 MT to Russia. In January 2003, Russia announced it would impose an import quota of 335,000 MT for fresh and frozen pork for the period from April through December 2003. To counter the safeguard measure imposed by Japan, the EU enforced a private storage scheme (PSA) from December 2002 to April 2003. By the end of 2002 about 30,000 MT of pork were stored under this program, 23,000 MT of which were stored in Denmark.

As a result EU pork exports are currently forecasted to decline by 15%. This decline in EU-15 exports also incorporates an element of increased competition in the Russian market from South American exports. In early 2003, nearly all EU pork exports to Russia were terminated due to competition from Brazilian exports. In order for the EU to compete with Brazilian exports to Russia, export restitutions would need to be high, therefore it is not expected that the EU will impose export restitutions for pork exports to Russia.

The EU pork held under the PSA program, which was imposed to overcome the Safeguard measure, was released in June 2003. At that point, the volume of pork held under the PSA program reached an approximate volume of 112,000 MT. Although the Japanese market is more demand driven than the Russian market, competition in the Japanese market is tightening. In 2003, it is expected that Denmark will maintain its current level of pork exports to Japan, while Spain is expected to attempt to increase overall exports from 10,000 MT (2002), to 12,000 MT (2003). The forecast for 2004 EU pork exports to Russia is predicted to remain under pressure, as EU pork exports to Japan are expected to decline due to decreased Japanese demand and stronger competition from other pork exports.

Total domestic consumption of EU pork is expected to increase as a result of lower prices and ample supply. Domestic use is also expected to increase slightly due to the use of commercial stocks built up in 2003. These commercial stocks of pork will be carried over into 2004.

EU Pork production (EU and top 3 member states) –'000 MT

	2003	**2004**
Total EU	17,850	17,900
Germany	4,160	4,140
Spain	3,080	3,136
France	2,380	2400
Other Member States	8,178	8,224

EU Pork consumption (EU and top 3 member states) –'000 MT

	2003	**2004**
Total EU	16,940	17,000
Germany	4,315	4,300
Spain	2,790	2,801
France	2,261	2,270
Other Member States	7,574	7,629

EU Pork exports (EU and top 3 member states) –'000 MT

	2003	**2004**
Total EU	1000	960
Denmark	485	500
Germany	95	90
France	80	85
Other Member States	340	285

POLICY / ANIMAL DISEASES

BSE CLASSIFICATION

In 2003 the EU adopted a regulation of the European Parliament and the Council amending Regulation 999/2001 regarding the extension of the period for transitional measures for BSE. This Regulation establishes rules for determining the BSE status of a member state, third country. As problems have been encountered in using the criteria laid down in this regulation and scientific risk assessments of all countries have not been fully concluded, the Regulation will be extended until July 2005.

BSE TESTING

In the first half of 2003 the EU carried out 4.1 million BSE tests and detected 591 cases of BSE. This shows a decline from previous years. An invitation to accession countries to submit voluntary BSE reports was made as Cyrus, Lithuania, Latvia, Malta, Poland, and Slovakia have all started sending updates. The UK is proposing to replace the rule excluding from the food chain animals (cattle) older than 30 months from BSE testing, admitting these animals to the food chain.

FMD

In June of 2003 the EU reached a political agreement on a proposal for a Council Directive on Community measures for the control of foot and mouth disease. The two issues that were addressed were the recognition by third countries of a new EU directive which emphasizes the emergency vaccination and the principle of regionalization, and secondly the direct and indirect financial consequences of the use of preventive vaccination on animals.

ANIMAL WELFARE

Consumer health Commissioner Byrne continues to emphasize the priority of Animal Welfare issues for the Commission however states a full analysis and consultations are still necessary. Commissioner Byrne has also re-iterated that his principal objective is to promote measures to enforce enhanced animal protection rules, particularly for long distance journeys.

The basis of the animal welfare movement in the EU results from the guidelines in the The Treaty of Amsterdam, in force since 1st May 1999, which lays out new ground rules for the actions of the EU on animal welfare in the *"Protocol on the Protection and Welfare of Animals"* This protocol recognizes that animals are sentient beings and obliges the European Institutions to pay full regard to the welfare requirements of animals when formulating and implementing Community legislation.

Additionally, export refunds for live bovines will be subject to tighter animal welfare requirements following the adoption of a new Commission regulation. The regulation is part of the Commission's drive to reinforce the conditions and controls under which export subsidies for live animals can be granted.

TRADE IN SEMEN

The Council adopted a Directive amending the Directive laying down the animal health requirements applicable to intra-Community trade in and imports of semen of domestic animals of the bovine species. The purpose of the Directive is: (1). to allow the storage of semen at premises other than the Artificial Insemination center where the semen is collected, (2). to amend the Directive as new scientific data and new provisions have been laid down in the OIE, and (3). to simplify (at the Community level) the procedure for the agreement and listing of AI centers in third countries. The deadline for member states to include this Directive into national legislation is July 1, 2004.

ANIMAL BY PRODUCTS

EC Regulation 1774/2002 is, after the TSE Regulation adopted in 2000, the second key action of the EU's White Paper on Food Safety and is a major component of the Commission strategy to combat and eradicate feed-borne food crises such as BSE, foot and mouth disease, swine fever and dioxin contamination. Under the Regulation, only materials derived from animals declared fit for human consumption following veterinary inspection may be used for the production of feeds. It also bans intra-species recycling, so-called "cannibalism". It sets out rules on what must and may be done with the excluded animal materials, imposing strict identification and traceability system requiring products such as meat and bone meal and fats destined for destruction to be permanently marked to avoid possible fraud and risk of diversion of unauthorized products into food and feed. This regulation will be fully enforced in January 2004.

FOOD HYGIENE

The Council reached a political agreement on two legislative proposals in the "food hygiene" package. Hygiene 3, which is a proposal for a Regulation laying down specific rules for the organization of official controls on products of animal origin intended for human consumption, and Hygiene 5, which is a Directive repealing certain Directives concerning food hygiene and health conditions for the production and placing on the market of certain products of animal origin intended for human consumption. A common position was not adopted as many delegations wanted to wait until after the text had been technically finalized, which is expected in September of 2003. Once this is completed the proposals will be forwarded to the European Parliament. The Hygiene package aims to overhaul 17 current Directives and replace them with 4 Regulations and a Directive aimed at merging and simplifying EU legislation on hygiene. As an agreement has now been reached on the 5 pieces of legislation, the entire Hygiene Package is expected to be approved at the September Council, and then forwarded to the EP for political agreement by 2004, with an expected 2006 enforcement date.

HORMONES

In 2003 the EU adopted the proposal for a Directive amending Council Directive 96/22/EC. This Directive prohibits the use and the stockfarming of certain substances having hormonal or thyrostatic action and of beta-antagonist. The adoption of the amendments would effectively cause the use of this hormone on breeding animals to phase out over a period of three years from the entry into force of this Directive. Oestradiol 17 beta, Testoterone, progesterone, tenbolone acetate, zeranol and melengestrol acetate, will continue to be provisionally prohibited, pending more complete scientific information. Exceptions will be made for therapeutic purposes or zootechnical treatment.

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Report Number	Title
E23004	Stricter Labeling Rules for Meat Products
E23012	EU Veterinary Legislation Guide
E23067	EU Agricultural Budget
E23078	Animal by-products Rules Delayed
E23101	Chronic Wasting Disease
E23113	EU Drafts Law Approving FMD Vaccination
E23116	EU to Increase Animal Welfare During Transit
E23121	CAP Reform Deal Approved
E23150	European Commission Acts on Pigmeat, BSE, and Feed Additives
E23151	Stricter Meat Labeling, Livestock Transport and Third Country Imports are being Enforced in the EU

Report Number	Title
DA3014	Danish Pork Exports, January to June, 2003

Report Number	Title
GM3006	German Cattle Identification and Beef Labeling
GM3021	Biotechnology-Non-GMO Pork in Germany
GM3020	BSE in Germany-Update covering the first half year of 2003

Report Number	Title
SW3008	Salmonella Outbreak in Sweden

Report Number	Title
BE3011	BSE Monitoring System Results for 2002
BE3031	Livestock and Products Annual
BE3032	Classical Swine Fever Still Present in Luxembourg

Report Number	Title
UK3018	Possible Changes to the UK's BSE Controls Ahead