Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network

Scheduled Report - public distribution Date: 8/1/1999

GAIN Report #BE9021

Belgium/Luxembourg & The Netherlands

Livestock

Livestock and Products Annual Report

1999

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Report Highlights:
This an overview of the Dutch and Belgian/Luxembourg Livestock and By-product sector.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Brussels [BE1], BE

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Executive Summary

The Netherlands

The Dutch dairy herd continues to decrease as a consequence of restrictive EU dairy policies and increases in milk yields per cow. The economic situation in the Dutch beef sector is declining as EU beef supplies are high and prices are low.

The Dutch veal sector did well in 1998 but since then, prices have dropped because of slackening demand. The Dutch government was able to convince the EU that some support for the veal industry is necessary in the year 2000. The EU agreed to institute a slaughter premium of 50 euro per animal. About 95 percent of Dutch veal production is exported to other EU countries.

Dutch consumption of beef is under pressure because of relatively low pork and poultry prices. The US is rapidly losing its export market for high quality beef in the Netherlands. Rigorous, time-consuming and expensive EU testing for hormonal compounds has seriously hampered trade.

In a reaction on the US/EU growth hormone dispute, a contact at the Dutch Ministry of Agriculture opined that the Netherlands meat industry connot be unhapy with the USG's retaliation list. He added that so far, EU studies about hormones in beef had not provided new information. Although the EU promises to release final reseatch by the fall of this year, our contact believes that this will only happen in the spring 2000.

The Dutch swine herd has recovered from the 1997 swine fever disaster. However, EU pork prices are still very low and no change is expected before the end of this year. So far the Dutch government has been unable to force swine farmers to reduce their swine herd by a total of 25 percent. New Dutch government measures trying to reduce animal waste and to minimize health hazards, can be expected later this year.

According to the Product Board for Margarine, Fats and Oils, the production of edible fats increased by about 8 percent in 1998 compared to 1997. The production of inedible fats increased by about10 percent from 1997 to 1998. Production of lard increased by 20 percent, which was the main cause for the rise in total production of edible fats. The production of tallow in 1998 decreased by about 7 percent due to lower slaughter numbers of bovine animals. The use of total animal fats in the Netherlands decreased by about 3 percent. The usage of edible fats in the food processing industry increased by about 20 percent, while the industrial use of tallow and greases decreased by about 25 percent. The Dutch and Belgian Governments require SRMs to be removed and destroyed. SRMs will remain one of the most important trade policy issues to be resolved. In 1999, the Belgian and Dutch feed sector suffered in sales and image due to the dioxin contamination of animal feed.

Belgium/Luxembourg

Since the discovery in Belgium of dioxin in feed in the beginning of June 1999, the Belgian meat industry has suffered serious finanical setbacks. EU traders do not buy or demand large price concessions when dealing with Belgian meat exporters. Many non-EU countries have closed their borders to Belgian meat. Swine farmers are having great difficulties in selling their slaughter hogs or piglets. Stables are becoming overpopulated and the pork has to be put in storage.

So far the Belgian government has promised only limited financial aid to this particular sector. In addition EU authorities claim that the dioxin crises is a calamity which is not covered by EU regulation's so no funding is available. On July 19, 1999, the EU Commission responded negatively to an official Belgian request for intervention and storage aid for the Belgian pork sector.

One US$ equals
1997 = Dfl 1.954
1998 = Dfl 1.983
July '99 = Dfl 2.150

Cattle & Beef - The Netherlands

Production

PSD Table						
Country	Netherlands					
Commodity	Animal Numbers, Cattle				(1000 HEAD)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Total Cattle Beg. Stks	4,292	4,292	4,210	4,184	0	4,100
Dairy Cows Beg. Stocks	1,416	1,416	1,400	1,350	0	1,300
Beef Cows Beg. Stocks	0	0	0	0	0	0
Production (Calf Crop)	2,100	2,027	2,075	1,996	0	1,880
Intra EC Imports	725	665	700	595	0	645
Other Imports	25	7	25	5	0	5
TOTAL Imports	750	672	725	600	0	650
TOTAL SUPPLY	7,142	6,991	7,010	6,780	0	6,630
Intra EC Exports	80	57	75	50	0	50
Other Exports	20	30	15	30	0	30
TOTAL Exports	100	87	90	80	0	80
Cow Slaughter	800	684	790	650	0	625
Calf Slaughter	1,152	1,373	1,150	1,300	0	1,325
Other Slaughter	560	355	560	350	0	300
Total Slaughter	2,512	2,412	2,500	2,300	0	2,250
Loss	320	308	310	300	0	250
Ending Inventories	4,210	4,184	4,110	4,100	0	4,050
TOTAL DISTRIBUTION	7,142	6,991	7,010	6,780	0	6,630
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	Netherlands					
Commodity	Meat, Beef and Veal			(1000 MT CWE)(1000 HEAD)		
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Slaughter (Reference)	2,512	2,412	2,500	2,300	0	2,250
Beginning Stocks	1	1	1	1	0	1
Production	565	535	565	510	0	500
Intra EC Imports	125	145	130	140	0	145
Other Imports	50	32	50	40	0	30
TOTAL Imports	175	177	180	180	0	175
TOTAL SUPPLY	741	713	746	691	0	676
Intra EC Exports	310	324	340	330	0	330
Other Exports	81	80	64	70	0	60
TOTAL Exports	391	404	404	400	0	390
Human Dom. Consumption	330	308	305	290	0	285
Other Use, Losses	0	0	0	0	0	0
TOTAL Dom. Consumption	330	308	305	290	0	285
Ending Stocks	20	1	37	1	0	1
TOTAL DISTRIBUTION	741	713	746	691	0	676
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

As of January 1, 1999 the Dutch cattle herd decreased by 2.5 percent, compared to 1998 year. The number of dairy cows decreased by almost 5 percent. The EU milk quota system and a more efficient dairy herd are the reason for this decline. A smaller (dairy) cattle herd caused Dutch beef and veal production to decrease by 5.3 percent in 1998.

The Netherlands - Cattle - May Livestock Census
(1,000 Head)

	1997	**1998**	**1999***	**1998=100**
Cattle Total	4,411	4,283	4,251	99
of which :				
beef/veal animals	1,261	1,215	1,247	103
- calves for white veal prod.	603	610	640	105
- calves for rosé veal prod.	101	108	120	111
- other cattle for meat prod.	412	366	332	91
dairy animals	3,150	3,161	3,004	95
young animals	1,551	1,442	1,387	96
dairy cows	1,591	1,611	1,608	100

*Preliminary Source :C.B.S.

Economic circumstances in the Dutch beef sector were not so good in 1998. Because of the Russian monetary crisis, exports to that country decreased sharply. Prices for culled dairy animals were particularly low. Prices of meat from steers did not decrease that much because of EU support measures. Cattle slaughtering decreased by about 100,000 animals in 1998. A similar decrease is expected for 1999. A lower profitability of the steer fattening industry, the numbers decreased by 25 percent since 1990, and the ever increasing efficiency of the dairy herd is causing the gradual decline in slaughter numbers. For 1999 a further decrease in cattle numbers can be expected. As a consequence, domestic supply of newly born calves will decrease further which is detrimental to the veal fattening industry.

The Netherlands: Bovine Slaughter
(no. x 1,000)

	1996	1997	1998	1999*
Steers/bulls	346	314	282	270
Cows	814	795	684	680
Heifers	44	43	73	50
Calves	1,196	1,351	1,373	1,300
Total	2,400	2,503	2,412	2,300

* Estimated
Source: CBS

The Netherlands is a large producer of veal of which approximately 90 percent is exported to other EU countries with Italy as the most important destination. Out of the total cattle slaughter number of 2.4 million, 1.4 million or 58 percent pertains to veal calves.

With a continuous decrease in Dutch dairy cattle numbers, the veal industry has to import newly born calves from surrounding countries such as Germany and Belgium. Importation from Belgium is momentarily hampered because of the dioxin crises. The EU early slaughter premium which was advantageous to the Dutch veal industry was discontinued on December 1, 1998. Lower veal prices and a relative shortage of newly born calves will probably decrease the 1999 Dutch veal production.

Originally, the Agenda 2000 proposals did not foresee in any support for the European veal industry. The Dutch government was able to convince the EU that a price decrease for beef of 20 percent would have a negative effect on veal prices as well. Whereas lower beef prices would be compensated by various premiums, this compensation was not foreseen for veal. The EU agreed to institute a slaughter premium for veal calves of 50 euro, for calves not older than 7 months and a maximum slaughter weight of 160 kilos.

Consumption

Relatively low pork and poultry prices prompted the Dutch consumer to buy less beef in 1998 and most likely in 1999. The interest of the Dutch consumer in fresh beef and veal is decreasing in favor of the easy-to-cook beef/veal products. Consumption of beef and veal in the food service sector is still slightly increasing.

The Netherlands: Per Capita Consumption of Beef and Veal in Kilos					
	1995	**1996**	**1997**	**1998**	**1999***
Beef	19.2	19.3	19.0	18.4	18.7
Veal	1.1	1.1	1.2	1.3	1.3
Beef & Veal	20.3	20.4	20.2	19.7	20.0

* Estimated Source: Product Board for Livestock and Meat

Disease Situation

On March 17, 1999 the Ministry of Agriculture confirmed the sixth case of Bovine Spongiform Encephalopathy (BSE) in the Netherlands. It was the second case in 1999.

In February of 1999, cows on 12 farms showed signs of a BVD-infection. This infection occurred approximately 10 days after the animals were vaccinated with an anti-IBR-vaccine. It appeared that the vaccine used came from a contaminated batch. All animals from the 12 farms have been killed and destructed. The German manufacturer of the vaccine assumed responsibility for this incident and paid the damage to the 12 farmers, totaling US $ 2.3 million.

Another 6,600 Dutch dairy farmers blamed the contaminated German vaccine for a deterioration of the condition of their cattle herd with a consequent decrease in milk production and a above normal abortion rate. Also these farmers want to be compensated for their damage.

Trade

In 1998 the U.S. exported for a value of US$ 16,284,000 of high quality beef and veal to the Netherlands an increase of 5.1 percent over the preceding year.

Dutch Imports of U.S. Beef/Veal		
	Metric Tons / Carcass Wght	% of HQB Quota (±)
1995	2,886	25
1996	5,088	44
1997	5,539	48
1998	3,520	31

The 1998 decrease in imports was partly due to higher U.S. veal prices but to an increasing extent containers arriving in Rotterdam are clearing customs in other EU countries. Dutch imports of US beef and veal are mostly for re-exports.

Since May of 1999, exports of U.S. untreated beef and veal to the EU are seriously hampered by the EU. The EU authorities question the untreated (with hormonal growth promotants) status of the beef and require EU sampling of all U.S. beef/veal shipments. Two samples of each consignment of U.S. beef are taken at the EU border to be tested for the presence of growth promotants. The samples are sent to either the EU Communities Reference Laboratory for Residues in Bilthoven, the Netherlands or to the National Reference Laboratory in Nantes, France.

Presently, June/July 1999, importation of U.S. beef into the Netherlands has come to a stand still. Dutch importers do not want to take the risk that a container of U.S. high quality beef, valued at approximately U.S.$ 100,000 is refused entry into the EU. Importers require a guarantee from U.S. exporters that the beef is untreated. So far, U.S. exporters do not want/are unable to give this guarantee.

A container of U.S. beef, refused entree in the EU has to be re-exported to the United States if re-entree is allowed by U.S. authorities. Otherwise, the shipment must be sold to any other country outside the EU, most likely for less than half the value.

Dutch beef exports in 1998 and 1999 are hampered by the loss of the Russian market. However exports have also decreased as a consequence of the BSE crises. Consumers in for instance Germany and France prefer their own national product over imported product which they consider not to be as safe. This attitude is encouraged by the national meat producers associations. The dioxin crises adds to the problem as some countries believe that the Netherlands and Belgium are so close, that Dutch beef and veal is also suspected to be contaminated.

Trade Matrices

Import Trade Matrix				
Country	Netherlands		Units:	1,000 Head
Commodity	Animal Numbers, Cattle		Partial Begin	January
			Partial End	June
Imports for:	1997	1998	1998	1999
	Full	Full	Partial	Partial Forecast
U.S.				
Others				
E.U.	523	434	219	210
-Germany	253	206	108	105
-Belgium/Lux	176	125	66	65
-Italy	11	29	15	10
-France	28	34	10	10
-Denmark	31	27	13	10
-Spain	8	6	3	3
Poland	6	3	2	1
Total for Others	529	437	221	211
Others not Listed	1	1	1	4
Grand Total	530	438	222	215

Export Trade Matrix				
Country	Netherlands		Units:	1,000 Head
Commodity	Animal Numbers, Cattle		Partial Begin	January
			Partial End	June
Exports for:	1997	1998	1998	1999
	Full	Full	Partial	Partial Forecast
U.S.				
Others				
E.U.	75	48	26	25
-France	33	19	12	15
-Belgium/Lux	17	8	5	7
-Germany	5	5	1	2
-U.K.	5	1	1	2
-Italy	4	4	2	2
-Spain	6	5	3	2
Poland	3	3	1	1
Morocco	3	10	5	3
Algeria	1	3	2	2
Total for Others	82	64	34	31
Others not Listed	12	9	4	4
Grand Total	94	73	38	35

Import Trade Matrix				
Country	Netherlands		Units:	1000 MT CWE
Commodity	Meat, Beef and Veal		Partial Begin	January
			Partial End	June
Exports for:	1997	1998	1998	1999
	Full	Full	Partial	Partial Forecast
U.S.	5,539	3,520	2,010	2,000
Others				
E.U.	115,319	116,525	48,678	49,000
-Germany	47,499	61,068	23,597	24,000
-Belgium/Lux	30,740	18,387	9,042	8,000
-Ireland	13,506	16,272	6,344	6,000
-France	6,878	5,603	2,657	2,700
-Italy	8,890	8,023	4,115	4,000
Brazil	11,486	14,136	5,932	6,000
Argentina	4,861	3,585	1,768	1,500
Uruguay	2,455	2,707	1,329	1,500
Total for Others	134,121	136,953	57,707	58,000
Others not Listed	439	1,334	244	1,000
Grand Total	140,099	141,807	59,961	61,000

Export Trade Matrix				
Country	Netherlands		Units:	1000 MT CWE
Commodity	Meat, Beef and Veal		Partial Begin	January
			Partial End	June
Exports for:	1997	1998	1998	1999
	Full	Full	Partial	Full
U.S.				
Others				
E.U.	314,826	285,720	131,293	130,000
-France	70,557	72,320	32,374	33,000
-Germany	76,951	65,312	29,523	30,000
-Italy	77,256	72,356	35,156	35,000
-Greece	18,568	13,697	7,108	7,000
-Denmark	15,474	14,505	6,510	7,000
Egypt	29,791	21,380	7,423	7,000
Russia	52,754	20,652	14,260	10,000
Iran	3,089	11,051	2,796	2,000
Lebanon	1,809	1,937	953	1,000
Total for Others	402,269	340,740	156,725	15,000
Others not Listed	25,216	12,733	5,967	5,000
Grand Total	427,485	353,473	162,692	155,000

Prices

Cattle, producer prices in Dutch Guilders
per kilo live weight

	The Netherlands					**Belgium***			
	1997	1998	1999	Change		1997	1998	1999	Change
January	2.47	2.67	2.12	-20.8%		2.75	2.79	4.30	54.5%
February	2.48	2.65	2.20	-16.9%		2.75	2.74	4.27	56.1%
March	2.56	2.65	2.23	-15.8%		2.87	2.70	4.20	55.6%
April	2.56	2.66	2.26	-15.3%		2.83	2.74	4.16	52.3%
May	2.65	2.71	2.33	-13.7%		2.85	2.91	4.24	45.8%
June	2.64	2.74	2.43	-11.3%		2.84	2.93	4.23	44.4%
July	2.63	2.73				2.88	2.92		
August	2.71	2.72				2.95	2.90		
September	2.77	2.62				2.93	2.80		
October	2.76	2.48				2.86	2.79		
November	2.74	2.39				2.87	2.71		
December	2.69	2.39				2.8	2.69		

Source: Dutch Product Board for Livestock One US$ equals :- 1997 = Dfl 1.954 1998 = Dfl 1.983 July ‘99 = Dfl 2.150

** Note : 1998 and 1999 Belgian prices for live, mature cattle are not comparable because of an EU change in weighing coefficients.*

Through August of 1998, prices of Dutch slaughter cattle were higher than in the preceding year. Because of the

Russian monetary crises exports of EU beef to Russia were seriously hampered and oversupplies caused a bearish EU beef market. EU restitutions and intervention measures were only partially successful in keeping a bottom in the market

Cattle & Beef - Belgium/Luxembourg

Production
Official 1998 statistics show a 10. 6 percent decrease in cattle slaughter, compared to the preceding year. The first outbreaks of BSE in 1996 and the consequent lower price levels had a detrimental effect on beef production in Belgium in the following years. Secondly, although the official trade statistics do not show, the Belgium Agricultural Economic Center (CLE) believes that in 1998 a large number of young live slaughter steers were exported to France and the Netherlands, which otherwise would have been slaughtered in Belgium. (See Trade paragraph)

For 1999 we expect an increase in cattle slaughter numbers in Belgium to about one million head.

Belgium beef production comes roughly for 50 percent from culled dairy animals and for 50 percent from the EU subsidized suckling cow program.

PSD Table						
Country	Belgium-Luxembourg					
Commodity	Animal Numbers, Cattle				(1000 HEAD)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Total Cattle Beg. Stks	2,990	3,184	2,920	3,186	0	3,150
Dairy Cows Beg. Stocks	652	688	642	680	0	670
Beef Cows Beg. Stocks	485	-	480	-	0	-
Production (Calf Crop)	1,230	1,291	1,215	1,339	0	1,375
Intra EC Imports	110	125	105	120	0	125
Other Imports	0	0	0	0	0	0
TOTAL Imports	110	125	105	120	0	125
TOTAL SUPPLY	4,330	4,600	4,240	4,645	0	4,650
Intra EC Exports	270	275	250	250	0	280
Other Exports	0	0	0	0	0	0
TOTAL Exports	270	275	250	250	0	280
Cow Slaughter	320	281	320	350	0	320
Calf Slaughter	315	316	310	330	0	310
Other Slaughter	390	352	390	370	0	370
Total Slaughter	1,025	949	1,020	1,050	0	1,000
Loss	115	190	110	195	0	190
Ending Inventories	2,920	3,186	2,860	3,150	0	3,180
TOTAL DISTRIBUTION	4,330	4,600	4,240	4,645	0	4,650
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	Belgium-Luxembourg					
Commodity	Animal Numbers, Cattle				(1000 HEAD)	
	Revised	1995	Revised	1996	Revised	1997
	Old	New	Old	New	Old	New
Market Year Begin		01/1995		01/1996		01/1997
Total Cattle Beg. Stks	0	3,365	0	3,362	0	3,280
Dairy Cows Beg. Stocks	0	847	0	732	0	698
Beef Cows Beg. Stocks	0	0	0	0	0	0
Production (Calf Crop)	0	1,415	0	1,363	0	1,332
Intra EC Imports	0	194	0	178	0	118
Other Imports	0	0	0	0	0	0
TOTAL Imports	0	194	0	178	0	118
TOTAL SUPPLY	0	4,974	0	4,903	0	4,730
Intra EC Exports	0	331	0	354	0	297
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	331	0	354	0	297
Cow Slaughter	0	322	0	354	0	331
Calf Slaughter	0	339	0	294	0	324
Other Slaughter	0	411	0	425	0	407
Total Slaughter	0	1,072	0	1,073	0	1,062
Loss	0	209	0	196	0	188
Ending Inventories	0	3,362	0	3,280	0	3,184
TOTAL DISTRIBUTION	0	4,974	0	4,903	0	4,731
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	Belgium-Luxembourg					
Commodity	Meat, Beef and Veal			(1000 MT CWE)(1000 HEAD)		
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Slaughter (Reference)	1,025	949	1,020	1,050	0	1,000
Beginning Stocks	5	0	11	0	0	0
Production	330	317	328	353	0	335
Intra EC Imports	37	22	39	20	0	25
Other Imports	2	2	2	0	0	0
TOTAL Imports	39	24	41	20	0	25
TOTAL SUPPLY	374	341	380	373	0	360
Intra EC Exports	115	113	115	100	0	130
Other Exports	30	0	24	0	0	0
TOTAL Exports	145	113	139	100	0	130
Human Dom. Consumption	218	228	218	273	0	230
Other Use, Losses	0	0	7	0	0	0
TOTAL Dom. Consumption	218	228	225	273	0	230
Ending Stocks	11	0	16	0	0	0
TOTAL DISTRIBUTION	374	341	380	373	0	360
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	Belgium-Luxembourg					
Commodity	Meat, Beef and Veal			(1000 MT CWE)(1000 HEAD)		
	Revised	1995	Revised	1996	Revised	1997
	Old	New	Old	New	Old	New
Market Year Begin		01/1995		01/1996		01/1997
Slaughter (Reference)	0	1,072	0	1,073	0	1,062
Beginning Stocks	0	0	0	0	0	0
Production	0	357	0	362	0	354
Intra EC Imports	0	31	0	32	0	47
Other Imports	0	0	0	0	0	0
TOTAL Imports	0	31	0	32	0	47
TOTAL SUPPLY	0	388	0	394	0	401
Intra EC Exports	0	158	0	159	0	161
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	158	0	159	0	161
Human Dom. Consumption	0	230	0	235	0	240
Other Use, Losses	0	0	0	0	0	0
TOTAL Dom. Consumption	0	230	0	235	0	240
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	0	388	0	394	0	401
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Belgium - Cattle - May Livestock Census (1,000 Head)				
	1996	**1997**	**1998**	**1997=100**
Cattle Total	3,243	3,157	3,090	98
of which:				
Cattle of less than 1 year:				
- to be slaughtered as calves	177	170	170	100
- other male bovines	327	302	295	98
- other female bovines	543	517	510	99
Cattle from 1 to less than 2 years:				
- male bovines	207	197	189	96
- female for slaughter	42	58	41	71
- heifers replacing cows in production	443	416	409	98
bovines of 2 years and more:				
- males	46	44	41	93
- heifers replacing cows in production	248	249	226	91
- dairy cows	637	617	619	100
- suckling cows	459	483	493	102
- female for slaughter and other	115	104	99	95

July 19, 1999 : May Census not yet available
Source: N.I.S.

Belgium: Bovine Slaughter (1,000 Head)				
	1996	**1997**	**1998**	**1999***
Steers	14	13	12	15
Bulls	339	316	273	285
Cows	346	324	276	290
Heifers	58	61	52	60
Calves	290	320	311	350
Total	1,046	1,035	923	1,000

*Estimates
Source: I.N.S.

Disease Situation
On June 29, 1999, Belgian veterinary authorities confirmed the ninth case of Bovine Spongiform Encephalopathy (BSE). This was the second time BSE was confirmed in 1999.

On June 22, 1999 and as consequence of the BSE situation in the country, the Belgian government introduced legislation to introduce the beef and beef product labeling system. The system is not yet effective although the industry can make use of it on a voluntary basis. This system should make it possible to trace any piece of beef or any beef product back to the slaughter animal. The Council Directive 820/97 requires all EU member states to start labeling beef and beef products as of January 1, 2000. Some doubt if the time frame to implement the system is realistic.

Consumption
Total consumption of beef and veal in Belgium and Luxembourg is expected to increase slightly in 1999. Consumers are expected to buy more beef because it will be relative cheap and it is less suspicious (dioxin) than chicken and pork.

Belgium: Per Capita Consumption of Beef and Veal
Kilos per inhabitant

	1996	1997	1998*	1999**
Beef & Veal	22.2	21.3	19.5	20.1

* Preliminary, ** Forecast
Source: C.E.A.

Trade
Official intra-EU trade figures, in the Netherlands, Belgium and Luxembourg, are highly inaccurate. Since January 1, 1993, customs documents, also used to record foreign trade, are no longer gathered at the intra-EU borders. This makes it increasingly difficult to analyze the Production, Supply and Distribution of live animals and meat in EU countries. To the extent possible, the Dutch Product Board for Livestock and Meat and the CLE in Brussels make corrections of totals, which we use for the PS&D tables.

Because of the dioxin incident, Belgian trade in live cattle and beef will be seriously hampered for at least the remainder of 1999 as foreign buyers either refuse to buy or demand price concessions.

Trade Matrices

Import Trade Matrix				
Country	Belgium-Luxembourg		Units:	1,000 Head
Commodity	Animal Numbers, Cattle		Partial Begin	January
			Partial End	June
Imports for:	1997	1998	1998	1999
	Full	Full	Partial	Partial Forecast
U.S.	0	0	0	0
Others				
EU	118	125	60	65
-France	59	58	29	30
-Netherlands	31	23	11	12
-Germany	28	43	19	20
Other EU	0	1	0	0
Total for Others	118	125	60	65
Others not Listed	0		0	0
Grand Total	118	125	60	65

Export Trade Matrix				
Country	Belgium-Luxembourg		Units:	1,000 Head
Commodity	Animal Numbers, Cattle		Partial Begin	January
			Partial End	June
Exports for:	1997	1998	1998	1999
	Full	Full	Partial	Partial Forecast
U.S.	0	0	0	0
Others				
EU	297	275	135	130
-France	74	53	25	30
-Netherlands	182	187	94	90
-Germany	18	12	6	5
-Italy	21	20	9	5
-Spain	2	3	1	0
Total for Others	297	275	135	130
Others not Listed	0	0	0	0
Grand Total	297	275	135	130

Import Trade Matrix				
Country	Belgium-Luxembourg		Units:	1,000 MT PWE
Commodity	Meat, Beef and Veal		Partial Begin	January
			Partial End	June
Imports for:	1997	1998	1998	1999
	Full	Full	Partial	Partial Forecast
U.S.	0	0	0	0
Others				
EU	33	22	8.3	10
-France	13	8	3	3
-Netherlands	10	8	3	3
-Germany	3	2	1	1
-Italy	3	0	0	0
-U.K.	1	0	0	0
-Ireland	2	1	0.3	1
-Spain	1	2	1	1
Other EU	0	1	0	1
Argentina	0	1	-	-
Total for Others	33	23	8.3	10
Others not Listed	2	1	1	1
Grand Total	35	24	9.3	11

Export Trade Matrix				
Country	Belgium-Luxembourg		Units:	1,000 MT PWE
Commodity	Meat, Beef and Veal		Partial Begin	January
			Partial End	June
Exports for:	1997	1998	1998	1999
	Full	Full	Partial	Partial Forecast
U.S.	0	0	0	0
Others				
EU	106	92	46	50
-France	29	25	13	15
-Netherlands	40	32	15	18
-Germany	13	9	5	2
-Italy	2	1	0.4	1
-U.K.	10	14	7	5
-Greece	8	8	4	3
-Spain	3	3	1.6	1
Other EU	1	0	0	5
Total for Others	106	92	46	50
Others not Listed	33	21	1	1
Grand Total	139	113	47	51

Prices

Belgian beef and veal prices, slightly increasing in the past few years have been dropping by about 10 percent since the start of the dioxin crisis. It is mostly foreign buyer resistance to pay the market price which forces Belgian exporters to do price concessions.

Cattle, producer prices in Dutch Guilders
per kilo live weight

	The Netherlands					**Belgium***			
	1997	1998	1999	Change		1997	1998	1999	Change
January	2.47	2.67	2.12	-20.8%		2.75	2.79	4.30	54.5%
February	2.48	2.65	2.20	-16.9%		2.75	2.74	4.27	56.1%
March	2.56	2.65	2.23	-15.8%		2.87	2.70	4.20	55.6%
April	2.56	2.66	2.26	-15.3%		2.83	2.74	4.16	52.3%
May	2.65	2.71	2.33	-13.7%		2.85	2.91	4.24	45.8%
June	2.64	2.74	2.43	-11.3%		2.84	2.93	4.23	44.4%
July	2.63	2.73				2.88	2.92		
August	2.71	2.72				2.95	2.90		
September	2.77	2.62				2.93	2.80		
October	2.76	2.48				2.86	2.79		
November	2.74	2.39				2.87	2.71		
December	2.69	2.39				2.8	2.69		

Source: Dutch Product Board for Livestock   One US$ equals :- 1997 = Dfl 1.954   1998 = Dfl 1.983   July ‘99 = Dfl 2.150

** Note : 1998 and 1999 EU prices for live, mature cattle are not comparable because of an EU change in weighing coefficients.*

Swine & Pork - The Netherlands

Production

PSD Table						
Country	Netherlands					
Commodity	Animal Numbers, Swine				(1000 HEAD)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
TOTAL Beginning Stocks	11,438	11,438	12,800	13,418	0	13,000
Sow Beginning Stocks	1,431	1,249	1,425	1,275	0	1,250
Production (Pig Crop)	27,862	30,387	25,250	29,282	0	26,000
Intra EC Imports	295	202	245	300	0	300
Other Imports	5	0	5	0	0	0
TOTAL Imports	300	202	250	300	0	300
TOTAL SUPPLY	39,600	42,027	38,300	43,000	0	39,300
Intra EC Exports	2,495	2,923	2,195	4,800	0	3,000
Other Exports	5	12	5	0	0	0
TOTAL Exports	2,500	2,935	2,200	4,800	0	3,000
Sow Slaughter	0	0	0	0	0	0
OTHER SLAUGHTER	18,300	19,277	19,000	19,200	0	17,800
Total Slaughter	18,300	19,277	19,000	19,200	0	17,800
Loss	6,000	6,397	5,900	6,000	0	6,000
Ending Inventories	12,800	13,418	11,200	13,000	0	12,500
TOTAL DISTRIBUTION	39,600	42,027	38,300	43,000	0	39,300
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	Netherlands					
Commodity	Meat, Swine			(1000 MT CWE)(1000 HEAD)		
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Slaughter (Reference)	18,300	19,277	19,000	19,200	0	17,800
Beginning Stocks	5	5	5	88	0	100
Production	1,610	1,717	1,660	1,700	0	1,580
Intra EC Imports	150	107	150	50	0	100
Other Imports	0	0	0	0	0	0
TOTAL Imports	150	107	150	50	0	100
TOTAL SUPPLY	1,765	1,829	1,815	1,838	0	1,780
Intra EC Exports	970	975	1,010	988	0	1,000
Other Exports	100	70	100	50	0	80
TOTAL Exports	1,070	1,045	1,110	1,038	0	1,080
Human Dom. Consumption	690	696	700	700	0	700
Other Use, Losses	0	0	0	0	0	0
TOTAL Dom. Consumption	690	696	700	700	0	700
Ending Stocks	5	88	5	100	0	0
TOTAL DISTRIBUTION	1,765	1,829	1,815	1,838	0	1,780
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

The Dutch swine sector is rapidly recovering from the disastrous swine fever outbreak in 1997. For the time being, production can continue to grow since the Dutch government can not go through with its plan to reduce the Dutch swine herd by 25 percent.

The Netherlands - Slaughterhog Production
x 1,000 Head

	1998	**1999***	**2000***
1st quarter	4,411	5,980	5,700
2nd quarter	4,910	5,725	
3rd quarter	5,890	5,950	
4th quarter	6,800	6,100	
Total for the Year	22,011	23,755	

*estimated Source: Product Board for Livestock and Meat, The Hague

The Dutch restructuring law of September 1, 1998, for the pork sector required a 10 percent reduction in swine numbers in 1998 and another 15 percent in the year 2000. The Dutch government did not deem it necessary to compensate swine farmers for their income losses.

In December 1998 the Dutch swine farmers challenged the new law in court. In an interim ruling, the judge found that the Dutch government had not proven that the restructuring law was necessary to meet Dutch (EU) environmental goals. The judge also ruled that the farmers should be compensated for their losses. The Dutch government took its case to the High Court, of which a decision is expected later this year.

The Dutch Minister of Agriculture has admitted that farmers are free to enlarge their herds as he has no legal way to curtail and/or limit production yet. However, the Minister has announced that in the fall of this year he will introduce an interim law which will limit swine production, not curtail, in the Netherlands to each farmers manure quota which he possessed on August 1998.

The Netherlands - Swine - May Livestock Census
(1,000 Head)

	1997	1998	1999*	1998=100
Total Number of Pigs	15,189	13,446	13,957	104
of which:				
piglets up to 20 kilos	5,996	5,094	5,513	108
slaughter hogs	7,433	6,591	6,877	104
breeding hogs	1,760	1,760	1,567	89

*Preliminary
Source: CBS

The Dutch swine herd at 11.5 million head by the end of 1997, increased to 13.5 million in April of 1998, stayed stable at that level through December of 1998 and increased further to 13.9 in April of 1999. However in April of 1999 the number of served sows decreased by 9.3 percent pointing to a decreased pig population by the end of this year. In order to meet EU environmental requirements, the Dutch government is obliged to keep looking for ways to curtail the Dutch swine herd. This might happen in the course of 2000, causing a further decrease in the Dutch swine population that year

Consumption

Low prices caused 1998 Dutch pork consumption to increase slightly to 696,000 mt or 44 kilos per capita. Only small increases are foreseen for 1999 and the year 2000. Although low pork prices tend to help increase consumption large subsidized, private storage pork stocks.

Stocks
On July1, 1999 the quantity of pork in EU subsidized private storage amounted to 230,000 metric tons, about 2 percent of total EU production. In the Netherlands 44,000 metric tons of pork was in private storage, in Belgium 12,000 metric tons whereas in Luxembourg there is no pork in private storage.

It is believed that the EU is ready to abandon the private storage regulation which is of course quite costly. On the other hand the dioxin crises in Belgium might prompt the Commission to wait until the fall of this year.

Trade
In 1998 and 1999, the Netherlands had to regain markets which were lost during the swine fever year 1997. Other EU countries had expanded their production to fill the gap. Because Dutch export of live animals was still banned in the first quarter of 1998, exports of pork increased quite substantial. As a consequence of the swine fever outbreak, a number of countries kept their borders closed for Dutch pork during the larger part of 1998. The monetary/economic crises in Russia and the far East and the increased competition with U.S. pork on the world market, had a depressing effect on pork prices. Basically the Netherlands could only turn to other EU countries to sell its pork. Oversupplies and stiff competition in the EU market helped prices to reach all time record lows through the first half of 1999.

Dutch frozen pork exports to Japan and Korea decreased in 1998, while exports to Hong Kong almost doubled to 11,392 mt.

It is expected that the Netherlands will export approximately the same quantity of pork in 1999.

Policy
In a reaction on USG’s retaliation in the US/EU hormone dispute, a contact at the Dutch Ministry of Agriculture and a contact at the Dutch Product Board for Livestock and Meat opined that the Netherlands meat industry cannot be unhappy with the retaliation list.

Dutch exports of canned hams to the US total about US $ 6 to 8 million per year and are not threatened since they were not on the list. Dutch frozen pork ribs are not on the list either. However, since the swine fever outbreak of 1997, the U.S. has been closed to Dutch pork. The Dutch expect to be able to resume these exports fairly soon. In 1996 Dutch pork rib exports amounted to US $ 0.9 million and was rapidly growing.

Veal is on the list and Dutch veal exports to the U.S. amounted to about US$ 3 million in 1997 with exports rapidly growing as well. However, since 1997 the U.S. has not allowed Dutch veal imports because of BSE.

Trade Matrices

Import Trade Matrix				
Country	Netherlands		Units:	1,000 Head
Commodity	Animal Numbers, Swine		Partial Begin	January
			Partial End	June
Imports for:	1997	1998	1998	1999
	Full	Full	Partial	Partial
U.S.				
Others				
E.U.	240	202	86	125
-Belgium/Lux	130	80	44	80
-Germany	20	87	23	30
-France	25	230	12	10
-Denmark	32	2	2	5
-U.K.	12	7	3	
-Spain	10	-	-	
Czeh Rep	3	-	-	
Total for Others	243	202	86	125
Others not Listed	1	0	0	0
Grand Total	244	202	86	125

Export Trade Matrix				
Country	Netherlands		Units:	1,000 Head
Commodity	Animal Numbers, Swine		Partial Begin	January
			Partial End	June
Exports for:	1997	1998	1998	1999
	Full	Full	Partial	Partial
U.S.				
Others				
E.U.	973	1,807	222	2,200
-Germany	416	700	139	1,500
-Spain	222	456	8	300
-Italy	176	396	47	300
-Belgium/Lux	82	168	21	100
-France	71	76	7	0
-Austria	2	2	1	0
Slovenia	2	0	0	0
Bosnia-Herz.	0	10	1	0
Total for Others	975	1,817	223	2,200
Others not Listed	0	1	1	0
Grand Total	975	1,818	224	2,200

Import Trade Matrix				
Country	Netherlands		Units:	1000 MT CWE
Commodity	Meat, Swine		Partial Begin	January
			Partial End	June
Imports for:	1997	1998	1998	1999
	Full	Full	Partial	Partial
U.S.	72			
Others				
E.U.	68,331	50,396	23,135	30,000
-Belgium/Lux	22,156	11,746	5,645	11,000
-Germany	14,660	15,100	5,503	7,000
-U.K.	10,428	6,129	3,283	5,000
-Denmark	6,734	5,599	2,771	4,000
-Italy	1,987	2,882	1,336	1,000
-France	6,782	6,241	3,158	2,000
Hungary	28	44	26	0
Czech Rep.	-	53	53	0
Total for Others	68,359	50,493	23,214	30,000
Others not Listed	127	77	43	0
Grand Total	68,558	50,570	23,257	30000

Export Trade Matrix				
Country	Netherlands		Units:	1000 MT CWE
Commodity	Meat, Swine		Partial Begin	January
			Partial End	June
Exports for:	1997	1998	1998	1999
	Full	Full	Partial	Partial
U.S.				
Others				
E.U.	611,646	719,206	354,117	330,000
-Germany	238,081	289,340	145,806	120,000
-Italy	151,822	189,906	91,705	75,000
-France	67,445	70,830	34,817	42,000
-Greece	48,357	68,053	26,129	25,000
-Belgium/Lux	57,124	46,163	37,409	40,000
Hong Kong	6,114	11,392	5,227	10,000
Japan	8,933	7,356	1	4,000
Hungary	1,641	3,939	2,730	2,000
Slovenia	1,796	6,091	2,617	500
Total for Others	630,130	747,984	364,692	346,500
Others not Listed	16,315	24,431	8,500	3,500
Grand Total	646,445	772,415	373,192	350,000

Prices

Because of European wide oversupplies, the Benelux pork sector looks back on a period with record low prices since mid 1998. It is forecasted that European pork supplies will diminish in the last quarter of 1999. It is only then when pork prices can be expected to reach a profitable level.

In the beginning of July 1999 Dutch slaughterhouses paid Dfl 2.50 per kilo slaughter weight (US$ 0.53 per pound). This is the highest price paid since April last year. The increase might be temporarily as it is believed that the Belgian dioxin crises causes a temporary extra demand for slaughter hogs and pork on the German market.

Swine, producer prices in Dutch Guilders
per kilo slaughter weight

	The Netherlands					**Belgium**			
	1997	1998	1999	Change		1997	1998	1999	Change
January	2.87	2.58	1.55	-39.8%		3.28	3.05	1.98	-35.1%
February	2.75	2.87	1.90	-33.7%		3.36	3.26	2.24	-31.2%
March	3.09	2.68	1.82	-32.1%		3.55	3.11	2.21	-29.0%
April	3.87	2.57	1.80	-29.7%		4.06	3.01	2.17	-28.0%
May	4.40	2.35	1.95	-17.2%		4.73	2.77	2.33	-16.0%
June	3.59	2.41	2.35	-2.5%		3.88	2.82	2.35	-16.8%
July	3.43	2.32				3.77	2.68		
August	3.84	2.10				4.10	2.50		
September	3.72	1.96				4.14	2.37		
October	3.32	1.77				3.75	2.14		
November	3.38	1.54				3.5	1.88		
December	2.62	1.78				3.2	2.236		

Source: Dutch Product Board for Livestock & Meat
One US$ equals :- 1997 = Dfl 1.954 1998 = Dfl 1.983 July '99 = Dfl 2.150

Swine & Pork - Belgium/Luxembourg

Production

PSD Table						
Country	Belgium-Luxembourg					
Commodity	Animal Numbers, Swine				(1000 HEAD)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
TOTAL Beginning Stocks	7,438	7,436	7,600	7,632	0	7,500
Sow Beginning Stocks	754	764	770	774	0	770
Production (Pig Crop)	11,942	12,436	11,940	12,400	0	12,250
Intra EC Imports	993	940	990	800	0	850
Other Imports	7	0	5	0	0	0
TOTAL Imports	1,000	940	995	800	0	850
TOTAL SUPPLY	20,380	20,812	20,535	20,832	0	20,600
Intra EC Exports	600	668	600	500	0	600
Other Exports	0	1	0	0	0	0
TOTAL Exports	600	669	600	500	0	600
Sow Slaughter	0	0	0	0	0	0
OTHER SLAUGHTER	11,300	11,661	11,500	11,832	0	11,550
Total Slaughter	11,300	11,661	11,500	11,832	0	11,550
Loss	880	850	890	1,000	0	850
Ending Inventories	7,600	7,632	7,545	7,500	0	7,600
TOTAL DISTRIBUTION	20,380	20,812	20,535	20,832	0	20,600
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	Belgium-Luxembourg					
Commodity	Animal Numbers, Swine				(1000 HEAD)	
	Revised	1995	Revised	1996	Revised	1997
	Old	New	Old	New	Old	New
Market Year Begin		01/1995		01/1996		01/1997
TOTAL Beginning Stocks	0	7,060	0	7,221	0	7,194
Sow Beginning Stocks	0	741	0	774	0	742
Production (Pig Crop)	0	11,861	0	11,849	0	12,185
Intra EC Imports	0	1,496	0	1,345	0	832
Other Imports	0	0	0	0	0	7
TOTAL Imports	0	1,496	0	1,345	0	839
TOTAL SUPPLY	0	20,417	0	20,415	0	20,218
Intra EC Exports	0	883	0	679	0	597
Other Exports	0	2	0	1	0	0
TOTAL Exports	0	885	0	680	0	597
Sow Slaughter	0	0	0	0	0	0
OTHER SLAUGHTER	0	11,461	0	11,654	0	11,196
Total Slaughter	0	11,461	0	11,654	0	11,196
Loss	0	850	0	887	0	989
Ending Inventories	0	7,221	0	7,194	0	7,436
TOTAL DISTRIBUTION	0	20,417	0	20,415	0	20,218
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	Belgium-Luxembourg					
Commodity	Meat, Swine			(1000 MT CWE)(1000 HEAD)		
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Slaughter (Reference)	11,300	11,661	11,500	11,832	0	11,550
Beginning Stocks	0	0	0	0	0	0
Production	1,040	1,026	1,060	1,041	0	1,015
Intra EC Imports	109	72	109	50	0	50
Other Imports	1	0	1	0	0	0
TOTAL Imports	110	72	110	50	0	50
TOTAL SUPPLY	1,150	1,098	1,170	1,091	0	1,065
Intra EC Exports	590	510	600	400	0	400
Other Exports	100	15	100	0	0	0
TOTAL Exports	690	525	700	400	0	400
Human Dom. Consumption	460	573	470	691	0	665
Other Use, Losses	0	0	0	0	0	0
TOTAL Dom. Consumption	460	573	470	691	0	665
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	1,150	1,098	1,170	1,091	0	1,065
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	Belgium-Luxembourg					
Commodity	Meat, Swine			(1000 MT CWE)(1000 HEAD)		
	Revised	1995	Revised	1996	Revised	1997
	Old	New	Old	New	Old	New
Market Year Begin		01/1995		01/1996		01/1997
Slaughter (Reference)	0	11,461	0	11,654	0	11,196
Beginning Stocks	0	0	0	0	0	0
Production	0	1,043	0	1,070	0	1,030
Intra EC Imports	0	86	0	90	0	106
Other Imports	0	0	0	0	0	0
TOTAL Imports	0	86	0	90	0	106
TOTAL SUPPLY	0	1,129	0	1,160	0	1,136
Intra EC Exports	0	628	0	656	0	677
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	628	0	656	0	677
Human Dom. Consumption	0	501	0	504	0	459
Other Use, Losses	0	0	0	0	0	0
TOTAL Dom. Consumption	0	501	0	504	0	459
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	0	1,129	0	1,160	0	1,136
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Belgian production of swine and pork increased in 1998 compared to the preceding year by about two percent. April/May 1999 census figures reveal a continued increase in Belgian slaughter hog production.

Belgium - Slaughterhog Production
x 1,000 Head

	1998	**1999***	**2000***
1st quarter	2,788	2,947	2,854
2nd quarter	2,751	2,991	
3rd quarter	2,773	2,820	
4th quarter	2,955	2,884	
Total for the Year	11,267	11,642	

*estimated Source: Product Board for Livestock and Meat, The Hague

The first three quarters of 1999 show a continued increase in production compared to the same quarters in 1998. Only in the last quarter of 1999 a 2.4 percent decrease and in the first quarter of 2000 a 3.2 percent decrease is forecasted in Belgian slaughterhog supply.

Since the discovery of dioxin in feed in the beginning of June 1999, the Belgian pork industry is in a deep crisis. By the end of June 1999, test results confirmed that swine at suspected farms were indeed contaminated with dioxin. Contaminated swine farms will be depopulated and the swine will be destructed. The cost of the destruction of the animals and/or product will be paid for by the Belgian government.

Damage to the Belgian swine industry is large. No matter what, Belgian pork is not trusted abroad, and exports of Belgian pork/slaughter hogs have dropped to 20-30 percent of normal levels.

This creates tremendous problems at the farms as slaughterhouses refuse to buy the slaughter hogs because their customers do not want the pork. Of course the slaughter hogs continue to gain in weight with all kinds of undesirable consequences such as: unnecessary feed cost, limited stable space, fatteners can not start a new fattening cycle, problems in the slaughterhouses etc.

On July 7, 1999 the Belgian government agreed to pay the market price for slaughter hogs which are overweight. The hogs will be slaughtered, stored and destructed afterwards. It is reported that one million Belgian hogs are overweight, sometimes at 1.5 times their normal weight. The cost to the Belgian government is estimated at Bfr 2.2 billion. EU authorities have approved the Belgian government aid in connection with the dioxin incident.

Pig breeders are also experiencing difficulties as fatteners refuse to buy piglets as their stables are full. On July 1, 1999, about 700 swine farms in Belgium were isolated because these farms are suspected to have received dioxin contaminated feed.

On June 25, 1999 the caretaker government of Belgium announced an emergency-help program valued at about US$ 100 million. The program foresees in interest free loans. Swine and cattle farmers who have/had contaminated animals or those farmers who were not allowed to sell because of suspected contamination can apply for such a loan. The money will have to be re-paid starting two years after the loan, in a period of five years.

Two thirds of the amount is earmarked for loans to agricultural holdings and one third for the meat/food processing industry.

The Belgian farmers organization is not at all satisfied with this proposal. They have requested the Belgian government to relieve the market of 530,000 pigs in the month of July 1999, whereby the farmers and the government equally share in the cost.

Belgium - Swine - May Livestock Census				
	1996	**1997**	**1998**	**1997=100**
Total Number of Pigs	7,225	7,313	7,632	104
of which:				
piglets of less than 20 kilos	2,001	2,060	2,221	108
pigs of 20 to less than 50 kilos	1,763	1,730	1,816	105
pigs for fattening - 50 kilos and more:	2,696	2,744	2,792	102
pigs for breeding - 50 kilos and more:				
- boars	17	17	16	94
- sows, bred	546	562	584	104
- sows, unbred	195	194	194	100
other	7	8	8	100

July 19, 1999 May Census not yet available
Source: I.N.S.

Also, Belgian farmers and meat product producers have requested their government to apply for EU support. However until now the EU Commission is of the opinion that they are unable to provide any financial relief. The Commission claims that the dioxin crises is a calamity which is not foreseen in any EU regulation, nor is their any budget available. The EU Commission has responded negatively to an official request from the Belgian Government for intervention and storage aid for the Belgian pork sector. This is different from a disease disaster like for instance the swine fever crises in the Netherlands in 1997. The EU participated heavily in the financial consequences of this disaster.

The Belgian meat-product producers are also experiencing very difficult times in selling their products abroad. Not only are they having difficulties in selling their product, they also receive claims from their foreign buyers for product which was traded before the dioxin crises emerged.

Consumption

After one month of dioxin crises, the Belgian consumption of pork is slowly getting at quote normal unquote levels, according to a spokesman of the Belgian farmers organization. The 1998 and 1999 pork prices, So far, have been at record low levels and that of course has stimulated consumption. The forecasted 1999 and 2000 pork consumption figures in the Belgian PS&D are high. However this does not mean that these amounts of pork are actually consumed, the pork might also go into storage destruction but at the moment there is no certainty about this.

Trade

Since the dioxin crises became public, on June 4, 1999 exports of Belgian slaughter hogs and pork have dropped to a 20 to 30 percent level of normal. Specially the German market, which is crucial to Belgian exporters has virtually ceased to exist for the Belgian pork producer. Some exports still take place, usually at sharp reduced prices. It seems that Italy is still buying Belgian pork because Italians are price buyers according to our Belgian spokesman. The Belgian government certifies exports of dioxin-free pork but so far this has not helped Belgian pork exports to any great extent.

On July 16, 1999 the Belgian Farmer Organization reported that a total of 429 sea-containers with pork destined for South Korea, Japan and the Philippine's were either blocked in Antwerp or Rotterdam, or at sea or at their destination. These shipments pertain to about 9,000 MT of pork, valued at about US$23 million.

At the moment reportedly, quite a few Belgian hogs are exported and slaughtered in the Netherlands. The carcasses are re-exported to Belgium as imported Dutch pork and processed into products with the guarantee that the product is made from Dutch pork.

Although Belgium is not restricted to export pork within the EU, Belgian pork sellers still meet a lot of resistance from their European and specially German buyers. It is expected that this situation will continue for the next months.

Trade Matrices

Import Trade Matrix				
Country	Belgium-Luxembourg		Units:	1,000 Head
Commodity	Animal Numbers, Swine		Partial Begin	January
			Partial End	June
Imports for:	1997	1998	1998	1999
	Full	Full	Partial	Partial Forecast
U.S.	0	0	0	0
Others				
EU	832	940	431	420
-France	167	125	83	80
-Netherlands	187	371	91	90
-Germany	404	413	232	230
-U.K.	39	21	16	15
-Austria	18	9	8	5
-Denmark	7	1	0	0
-Ireland	9	0	1	0
-Spain	1	0	0	0
Other EU	0	0	0	0
Total for Others	832	940	431	420
Others not Listed	7	0	0	0
Grand Total	839	940	431	420

Export Trade Matrix				
Country	Belgium-Luxembourg		Units:	1,000 Head
Commodity	Animal Numbers, Swine		Partial Begin	January
			Partial End	June
Exports for:	1997	1998	1998	1999
	Full	Full	Partial	Partial Forecast
U.S.	0	0	0	0
Others				
EU	597	668	329	350
-France	43	91	23	25
-Netherlands	215	129	71	75
-Germany	159	92	53	60
-Italy	165	335	176	185
-Austria	11	2	1	2
-U.K.	1	0	0	0
-Spain	3	15	4	2
-Portugal	0	2	1	1
Other EU	0	2	0	0
Total for Others	597	668	329	350
Others not Listed	0	1	0	0
Grand Total	597	669	329	350

Import Trade Matrix				
Country	Belgium-Luxembourg		Units:	1,000 MT PWE
Commodity	Meat, Swine		Partial Begin	January
			Partial End	June
Imports for:	1997	1998	1998	1999
	Full	Full	Partial	Partial Forecast
U.S.	0	0	0	0
Others				
EU	68	72	41	40
-France	15	13	7	7
-Netherlands	33	37	21	20
-Germany	5	4	2	2
-Spain	5	8	4	4
-U.K.	6	4	2	2
-Ireland	0	2	1	0
-Denmark	4	4	2	1
Other EU	0	0	2	0
Total for Others	68	72	41	40
Others not Listed	0	0	0	0
Grand Total	68	72	41	40

Export Trade Matrix				
Country	Belgium-Luxembourg		Units:	1,000 MT PWE
Commodity	Meat, Swine		Partial Begin	January
			Partial End	June
Exports for:	1997	1998	1998	1999
	Full	Full	Partial	Partial Forecast
U.S.	0	0	0	0
Others				
EU	462	510	250	250
-France	46	54	26	25
-Netherlands	44	34	20	20
-Germany	269	289	143	140
-Italy	67	85	41	40
-Spain	9	16	5	5
-U.K.	9	7	4	4
-Greece	10	15	7	7
-Portugal	3	3	2	0
Other EU	5	7	2	9
Total for Others	462	510	250	250
Others not Listed	13	15	0	0
Grand Total	475	525	250	250

Prices

Swine, producer prices in Dutch Guilders per kilo slaughter weight								
	The Netherlands				Belgium			
	1997	1998	1999	Change	1997	1998	1999	Change
January	2.87	2.58	1.55	-39.8%	3.28	3.05	1.98	-35.1%
February	2.75	2.87	1.90	-33.7%	3.36	3.26	2.24	-31.2%
March	3.09	2.68	1.82	-32.1%	3.55	3.11	2.21	-29.0%
April	3.87	2.57	1.80	-29.7%	4.06	3.01	2.17	-28.0%
May	4.40	2.35	1.95	-17.2%	4.73	2.77	2.33	-16.0%
June	3.59	2.41	2.35	-2.5%	3.88	2.82	2.35	-16.8%
July	3.43	2.32			3.77	2.68		
August	3.84	2.10			4.10	2.50		
September	3.72	1.96			4.14	2.37		
October	3.32	1.77			3.75	2.14		
November	3.38	1.54			3.5	1.88		
December	2.62	1.78			3.2	2.236		

Source: Dutch Product Board for Livestock & Meat
One US$ equals :- 1997 = Dfl 1.954 1998 = Dfl 1.983 July ‘99 = Dfl 2.150

Tallow& Grease - The Netherlands

Production

PSD Table						
Country	Netherlands					
Commodity	By-Products,Tallow & Grease				(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Beginning Stocks	21	32	16	16	0	7
Production	170	190	169	168	0	192
Intra EC Imports	198	196	197	199	0	196
Other Imports	79	64	79	70	0	76
TOTAL Imports	277	260	276	269	0	272
TOTAL SUPPLY	468	482	461	453	0	471
Intra EC Exports	85	117	87	86	0	119
Other Exports	2	3	3	3	0	4
TOTAL Exports	87	120	90	89	0	123
Domestic Consumption	365	360	364	362	0	344
Ending Stocks	16	2	7	2	0	4
TOTAL DISTRIBUTION	468	482	461	453	0	471
Calendar Yr. Imp. from U.S.	35	34	36	35	0	30
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

According to the Product Board for Margarine, Fats and Oils, the production of edible fats increased by about 8 percent in 1998 as compared to 1997. The production of inedible fats increased by about10 percent in 1998 as compared to 1997. Total animal fats production therefore increased by 9 percent. The increase in total production is mainly the result of the aftermath of the hog crisis in the Netherlands leading to excessive slaughter of animals and hence increased availability of destruction fats. Production of lard increased by 20 percent and this was the main cause that total production of edible fats increased. The production of tallow in 1998 decreased by about 7 percent due to decreased slaughter numbers of bovine animals as compared to 1997. The longer term outlook for production of animal fats in the Netherlands remains difficult to forecast. However, for the years 1999/2000 the production of tallow and lard will likely reach similar levels as those in 1997 although the effects of the continued low prices in the hog sector could push these levels up again. The general trend will be that the production of tallow in the Netherlands will likely decline, due to a on-going reduction of livestock numbers in the Netherlands. In Belgium tallow and grease production is estimated down by about 4 percent. According to trade sources this is mainly due to the bad image of these products as much attention was given in the media concerning BSE and SRM's.

The Netherlands - Production of Animal Fats (1,000 MT)					
Type of fat	1996	1997	1998*	1999**	2000***
Edible fats:					
Total	105.2	94.0	102.8	90.9	91.9
Lard	46.3	41.1	51.7	45.1	46.8
Tallow	52.0	49.5	45.7	43.0	43.0
Chicken fat	6.9	3.4	5.4	2.8	2.1
Inedible fats:					
Total	101.8	138.1	152.6	119.0	116.0
Bonefat	19.8	20.1	21.2	19.0	19.0
Destruction	78.4	114.0	127,2	96.0	94.0
Other	3.6	3.8	4.2	4.0	3.0
Grand Total	207.0	232.1	255.4	208.9	207.9

* updated ** preliminary *** Projected
SOURCE: Product Board for Margarine, fats & Oils Ag. Counselor Office Estimates.

Consumption
In 1998, the use of total animal fats in the Netherlands decreased by about 3 percent as compared to 1997. The usage of edible fats in the food processing industry increased by about 20 percent while the industrial use of tallow and greases decreased by about 25 percent. This is mainly attributable to the fact that the major processor, called Unichema (ICI subsidiary), is confronted with customers who want a guarantee that the tallow is not made out of BSE infected animals. The company is not able to guarantee this and therefore the industry is using more and more alternative raw materials. The specified risk maretial remain the most important issue in the animal fat and oil world and policies on the SRM's will influence the future development of the market seriously (see policy). Taking into consideration the lack of a EU policy on the SRM and the discussion in the Netherlands about this and other issues such as healthy foods, organic foods etc. it is anticipated that the total consumption and the total use of animal fats like tallow will continue the downward trend into the year 2000 and beyond. Consumers, continue to favor vegetable oils and fats, a trend which appears to be on-going. The use of tallow and greases in animal feeds increased by about 1 percent in 1998 as compared to 1997. This increase in mainly attributable to a recovery of the hog sector from the swine fever crisis.

The Netherlands - Local Use of Tallow & Grease including mixed/diluted fats, x1,000 MT						
Local use in:	1995	1996	1997	1998*	1999**	2000**
Food Products	13.8	10.0	11.1	13.9	12.5	12.2
Animal feed	370.2	368.3	345.5	349.6	321.4	315.2
Industrial Use***	77.6	75.0	71.6	52.9	50.1	48.9
Grand Total	461.6	453.3	428.2	416.4	384.0	376.3

*preliminary, **Projected, *** Refers mainly to fatty acid distillation for soap, paint, plastics floor covering etc.
SOURCE: Product Board for Margarine, Fats & Oils   Ag. Counselor Office Estimates.

In 1998, The usage of total animal fats in Belgium decreased by about 2 percent as compared to 1997. The industry is complaining about the uncertain situation created by the EU as no clear decisions have been made with regard to the SRMs. It is therefore anticipated that the domestic consumption will fall in 1999 and that processors will look for alternative raw materials.

The Netherlands : Compound Feed Production CY, x 1,000 MT						
Type of feed ration:	**1995**	**1996**	**1997**	**1998***	**1999****	**2000****
Cattle feed	4,026	3,804	3,500	3,600	3,500	3,500
Swine feed	7,405	7,459	6,800	5,500	5,400	5,150
Poultry feed	3,409	3,581	3,900	4,150	4,400	4,450
Other feed	752	784	800	740	740	720
Calf Milk Replacers	779	745	725	725	725	700
Grand Total	16,371	16,373	15,725	14,715	14,765	14,520

*) Preliminary.   **) Projections.
Source: Stigevo

Trade
In 1998, total exports of animal fats and fish oil fell by about 3 percent as compared to 1997. However, this was mainly attributable to a significant drop in fish oil exports of over 50 percent. The export of animal fats on the other hand, increased by about 18 percent. The increase is attributable to growth in the exports of lard. Total exports of **fish oil** fell by a spectacular 50 percent in 1998 as compared to 1997. According to the Product Board for Margarine, Fats and Oil, this is attributable to the significant lower supply in 1998 leading to high prices for fish oil especially when compared to palm oil. Lower supply c.q. production was due to lower availability of fishes in the world seas. Reduced demand for fish oil occurred in most EU as well as in third countries.

Total imports of animal fats in 1998 decreased by about 14 percent as compared to 1997. Tallow imports decreased by an estimated 25 percent. Imports from the US fell by about 0.6 percent. One of the causes of the total lower imports is the occurrence of BSE which led to uncertainty and hence reduced demand of the pharmaceutical industry. The reduced imports from the U.S. were also due to the price competitivenss of Uruguan and Canadian tallow over U.S. tallow. The EU is still the major tallow supplier to the Netherlands. The longer term outlook for the export and imports of tallow and grease is difficult to forecast because no clear EU legislation exists on the SRM and the WTO round on trade will start again in 1999 on which the SRM will likely be put on the agenda. Outcomes of these negotiations are difficult to predict. The Dutch Product Board for Margarine, Fats and Oils forecasts that for 1999 and 2000 the imports of tallow and grease will decrease especially the fats used for technical purposes like in the Pharmaceutical industry. Exports of lard will increase slightly in 1999/ 2000 as the Dutch prices are low dus to abundant supply. For the years 2005 - 2010 the Board anticipate a fall in both exports and imports of lard as the Dutch hog industry will than be smaller than it presently is.

Trade Matrices

Import Trade Matrix			
Country	Netherlands		
Commodity	By-Products,Tallow & Grease		
Time period	CY	Units:	Metric Tons
Imports for:	1997		1998
U.S.	36,038	U.S.	33,998
Others		Others	
E.U.	201,884	E.U.	188,469
-Belgium\Lux	36,286	-Belgium\Lux	38,592
-Germany	142,090	-Germany	110,288
-Ireland	7,939	-Ireland	15,306
Switzerland	3,140	Switzerland	2,664
Poland	17,193	Poland	13,726
Canada	4,486	Canada	1,627
Czech Rep.	5,777	Czech Rep.	0
Uruqauy	4,839	Uruqauy	0
Total for Others	237,319		206,486
Others not Listed	6,986		2,332
Grand Total	280,343		242,816

Export Trade Matrix			
Country	Netherlands		
Commodity	By-Products,Tallow & Grease		
Time period	CY	Units:	Metric Tons
Exports for:	1997		1998
U.S.		U.S.	116
Others		Others	
E.U.	103,916	E.U.	114,025
-Belgium\Lux	42,637	-Belgium\Lux	45,201
-Germany	30,814	-Germany	30,691
-U.K.	9,433	-U.K.	7,353
-Denmark	3,487	-Denmark	14,630
-Greece	0	-Greece	11,135
Gambia	0	Gambia	1,500
Total for Others	103,916		115,525
Others not Listed	3,121		4,565
Grand Total	107,037		120,206

Tallow & Grease - Belgium/Luxembourg

Production

PSD Table						
Country	Belgium-Luxembourg					
Commodity	By-Products,Tallow & Grease				(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Beginning Stocks	2	2	2	2	0	2
Production	22	23	21	18	0	19
Intra EC Imports	35	58	34	45	0	46
Other Imports	101	82	100	90	0	92
TOTAL Imports	136	140	134	135	0	138
TOTAL SUPPLY	160	165	157	155	0	159
Intra EC Exports	23	27	22	12	0	13
Other Exports	1	0	1	1	0	1
TOTAL Exports	24	27	23	13	0	14
Domestic Consumption	134	134	133	133	0	134
Ending Stocks	2	4	1	9	0	11
TOTAL DISTRIBUTION	160	165	157	155	0	159
Calendar Yr. Imp. from U.S.	0	6	0	6	0	6
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Total tallow and grease imports into Belgium are down by an estimated 4 percent as compared to 1997. Belgium imported larger quantities from other EU countries such as Germany and the Netherlands but imported substantially less from Canada. This was mainly attributable to the favorable prices in the EU countries. Belgium imports about 11,000 metric tons of tallow from the United States. Exports fell sharply by almost 30 percent, this is mainly attributable to decreased demand in France and the Netherlands. The exports to Denmark fell dramatically with about 95 percent, according to a trade source, this was attributable to the problems with BSE and SRM’s (see policy). Denmark has been very critical with regards to the EU’s SRMs policy and the Danish Government wishes to avoid all risks related to BSE and SRM’s.

Policy

The Dutch and Belgian Government require SRMs to be removed and destroyed. It is estimated that, with the current measures, up to 98% of SRMs are removed. The Governments are waiting for an EU decision prior to requiring the domestic industry to make additional costly changes to their slaughter facilities to achieve 100%. However, in December 1998, the EU’s Standing Veterinary Committee has comprehensively rejected the EU Commisions’s plans to impose common member state and third country requirements for removing specified risk material (SRM’s) on the basis of the perceived BSE risk. This means that the proposal to increase consumer protection by excluding from the food chain by law SRM’s (such as the spinal cords, brains and eyes of cattle) was voted down. The vote is considered another blow for the Commission which has been trying to get EU legislation through on this matter for years. Each time member states, worried over extra financial costs, have thwarted it. This vote now leaves in place even wider-ranging rules which came into force by default on

January 1, under which an already proposed SRM ban would be extended to cosmetics and pharmaceuticals, many of which contain cattle derivates such as tallow. The present situation threatens billions of dollars' worth of trade of tallow and tallow products, pharmaceuticals, cosmetics and many food stuffs. Belgium imports about 11,000 metric tons of tallow from the United States. Another issues which threathens the animal fats and compound feed industries is that of the dioxin scandal in Belgium and the Netherlands. During the period of January 16 and January 26 contamination of feed with dioxin occurred in Belgium. A company called Fogra supplied another fat rendering company called Verkest fats with high levels of dioxin. This led to a enormous scandal and all poultry, porc and beef products were taken off the supermarket shelves. The result was that the Belgium agricultural sector is on the virtue of collapse and has a damage of about US$ 5 billion dollars. Export markets collapsed and the Belgian Government fell over the issue. This dioxin crisis will affect the animal feed industry in Belgium and likely the EU wide, more rigid regulations are expected in the near future.

Trade Matrices

Import Trade Matrix			
Country	Belgium-Luxembourg		
Commodity	By-Products,Tallow & Grease		
		Units:	Metric Tons
Imports from:	1997		1998
U.S.	11,001		5,848
Others			
EU	32,678	EU	57,712
-France	17,688	-France	33,439
-Netherlands	5,708	-Netherlands	5,860
-Germany	5,750	-Germany	13,371
-Italy	0	-Italy	2
-U.K.	1,921	-U.K.	1,488
-Ireland	1,590	-Ireland	3,441
-Denmark	0	-Denmark	111
Other EU	21	Other EU	0
Canada	98,761	Canada	75,993
Total for Others	142,440		139,553
Others not Listed	0		0
Grand Total	142,440		139,553

Export Trade Matrix			
Country	Belgium-Luxembourg		
Commodity	By-Products,Tallow & Grease		
		Units:	Metric Tons
Exports for:	1997		1998
U.S.	0		0
Others			
EU	31,454	EU	26,813
-France	15,001	-France	6,555
-Netherlands	8,702	-Netherlands	9,081
-Germany	7,430	-Germany	6,152
-U.K.	27	-U.K.	84
-Spain	63	-Spain	3,563
-Denmark	151	-Denmark	117
-Ireland	80	-Ireland	104
-Italy	0	-Italy	1,157
Other EU	0	Other EU	0
Total for Others	31,454		26,813
Others not Listed	104		117
Grand Total	31,558		26,930

Hides & Skins - The Netherlands

Production

PSD Table						
Country	Netherlands					
Commodity	Hides & Skins, Bovine				(1000 MT)(1000 PCS)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Beginning Stocks	0	0	0	0	0	0
Production In MT	54	49	54	47	0	46
Production In Pieces	2512	2412	2500	2300	0	2250
Intra EC Imports	55	48	60	45	0	45
Other Imports	15	12	15	10	0	15
TOTAL Imports	70	60	75	55	0	60
TOTAL SUPPLY	124	109	129	102	0	106
Intra EC Exports	65	56	70	55	0	60
Other Exports	45	32	49	30	0	25
TOTAL Exports	110	88	119	85	0	85
Domestic Consumption	14	21	10	17	0	21
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	124	109	129	102	0	106
Calendar Yr. Imp. from U.S.	1	0	1	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Trade Matrices

Import Trade Matrix			
Country	Netherlands		
Commodity	Hides & Skins, Bovine		
Time period		Units:	
Imports for:	1997		1998
U.S.	878	U.S.	1,065
Others		Others	
E.U.	65,110	E.U.	48,124
-Belgium/Lux	10,529	-Belgium/Lux	8,444
-Germany	34,255	-Germany	29,181
-U.K.	3,182	-U.K.	3,847
Russia	6,933	Russia	3,138
Brazil	1,253	Brazil	2,330
Total for Others	73,296		53,592
Others not Listed	148		5,462
Grand Total	74,322		60,119

Export Trade Matrix			
Country	Netherlands		
Commodity	Hides & Skins, Bovine		
Time period	CY	Units:	Metric Tons
Exports for:	1997		1998
U.S.		U.S.	2
Others		Others	
E.U.	*70,000	E.U.	56,050
-France		-France	4,459
-Germany		-Germany	18,871
-Italy		-Italy	27,733
-Austria		-Austria	3,088
Argentina		Argentina	1,122
Indonesia		Indonesia	751
Hong Kong		Hong Kong	471
Total for Others	*70,000		58,394
Others not Listed	*48,000		29,691
Grand Total	*118,000		88,087

* These were estimated due to unreliable statistics

Hides & Skins - Belgium/Luxembourg

Production

PSD Table						
Country	Belgium-Luxembourg					
Commodity	Hides & Skins, Bovine				(1000 MT)(1000 PCS)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Beginning Stocks	16	0	15	0	0	0
Production In MT	33	23	32	25	0	24
Production In Pieces	1,025	947	1,020	1,050	0	1,000
Intra EC Imports	16	19	16	18	0	19
Other Imports	5	2	6	1	0	1
TOTAL Imports	21	21	22	19	0	20
TOTAL SUPPLY	70	44	69	44	0	44
Intra EC Exports	30	32	28	33	0	34
Other Exports	10	7	10	6	0	5
TOTAL Exports	40	39	38	39	0	39
Domestic Consumption	15	5	15	5	0	5
Ending Stocks	15	0	16	0	0	0
TOTAL DISTRIBUTION	70	44	69	44	0	44
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Trade Matrices

Import Trade Matrix			
Country	Belgium-Luxembourg		
Commodity	Hides & Skins, Bovine		
Time period	CY	Units:	Metric Tons
Imports for:	1997		1998
U.S.	66		0
Others			
EU TOTAL	16,152		18,563
France	3,951		4,119
Netherlands	2,044		1,033
Germany	2,687		1,540
U.K.	1,675		4,664
Ireland	3,418		4,332
Spain	1,263		1,855
New Zealand	0		1,026
Russia	787		270
Total for Others	16,939		19,859
Others not Listed	1,126		1,597
Grand Total	18,131		21,456

Export Trade Matrix			
Country	Belgium-Luxembourg		
Commodity	Hides & Skins, Bovine		
Time period	CY	Units:	Metric Tons
Exports for:	1997		1998
U.S.	242		0
Others			
EU TOTAL	33,460		32,296
France	3,287		3,603
Netherlands	14,943		13,338
Germany	1,308		1,919
Italy	7,569		5,942
U.K.	5,128		5,953
Other EU	1,225		1,541
South Korea	4,160		1,524
Hong Kong	3,961		3,952
Total for Others	41,581		37,772
Others not Listed	1,818		1,449
Grand Total	43,641		39,221