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Report Highlights:

The Dutch livestock sector was severely hit by the BSE and FMD crisis mainly due to export restrictions and reduced demand in export markets.

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Executive Summary

Cattle, Beef and Veal

Dutch cattle herd numbers in 2000 continued to trend downwards, declining 7 percent to nearly 3.9 million animals. The Dutch sector has been affected by the BSE crisis in the EU due to lower demand in France and Germany and import bans by third countries. More than fifty percent of Dutch beef and veal production is exported to other EU countries, mainly France, Italy and Germany. Dutch household purchases of beef remained relatively stable.

The twenty-six outbreaks of FMD in The Netherlands had more serious consequences. The Dutch cattle herd declined to 100,000 head by the end of June. Furthermore, the FMD crisis temporarily halted bovine slaughtering and beef and veal exports. Dutch veal exports, which are particularly dependent on foreign markets, decreased by nearly fifty percent during the first half of 2001.

Swine and Pork

During 2000, pig stocks declined by 2.4 percent to 12.8 million animals due to environmental restrictions and a related purchase program for the Dutch government. Despite the improved world market for pork, Dutch pork exports declined due to lower domestic production. Stocks were further reduced by the FMD crisis. Nearly 120,000 pigs were killed. Since the FMD crisis ended, exports of live pigs have resumed and reportedly surged to Germany and Italy. Preliminary figures of the Product Board reveal a reduction of fifty percent in pork exports during the first half of 2001.

Policy and Marketing

The Dutch livestock sector was severely hit by the BSE and FMD crises mainly due to export restrictions and reduced demand in export markets. The Dutch livestock sector depends on exports for more than fifty percent of sales and is thereby very sensitive to consumer concerns in these markets. The Dutch government's ambition is to rebuild consumer confidence and change the image of the Dutch livestock sector from that of an intensive producer to a quality producer. The Product Board for Livestock, Meat and Eggs (PVE) has developed a quality assurance system to ensure food safety and traceability. Furthermore, the PVE supports consumer labeling and aims to produce with non GM feeds, if requested and feasible. The PVE expects that, even with pressure on suppliers, about two years are needed to have a viable supply of non GM ingredients for feed.

Cattle, Beef and Veal

Production

The Netherlands - Cattle - May Livestock Census (1,000 Head)					
	1998	1999	2000	2001**	2002**
Cattle Total	4,283	4,206	4,051	3,750	3,700
of which :					
beef/veal animals	1,222	1,233	1,212	1,035	1,000
- calves for white veal prod.	610	634	637	625	620
- calves for rosé veal prod.	101	118	146	140	130
- other young cattle for meat prod.	366	328	285	270	250
dairy animals	3,061	2,972	2,829	2,715	2,700
young animals	1,442	1,374	1,325	1,270	1,260
dairy cows	1,611	1,588	1,504	1,445	1,440

*CBS December livestock census **OAA projection Source :CBS

The Dutch cattle herd declined steadily from 4.9 million in 1992 to 4.1 million head in 2000. During the last ten years, the number of dairy cows has declined from 1.9 million in 1990 to 1.5 million in 2000, mainly due to the quota system and increased milk production per cow. The Central Bureau for Statistics (CBS) December 2000 census revealed a continuation of this trend. The livestock herd declined 7 percent to nearly 3.9 million animals. In recent years, the Dutch veal sector was growing, driven by good demand in the EU. It was severely hit by the BSE crisis which led to a decline of consumption in foreign markets. In addition, a significant part of the Dutch veal industry is located in Eastern Netherlands, the region where the major FMD outbreaks occurred. By the end of June, the final number of animals killed in the controlled areas was estimated to be 266,155 of which 92,706 were cattle.

During 2000, the Dutch bovine slaughter decreased by 3.6 percent due to the shrinking cattle stock. As a consequence of the shrinking herd, a further reduction of the bovine slaughter is expected this year. Between Mid March and Mid May 2001, FMD outbreaks hampered bovine slaughtering and the export of beef and veal products. Since restrictions were lifted, slaughtering recovered, but live cattle is reportedly being exported due to the high costs of BSE testing in The Netherlands.

Consumption

The Netherlands: Per Capita Consumption of Meat (Kg)							
	1996	1997	1998	1999	2000	2001**	2002**
Beef	19.3	19.0	18.4	18.3	17.9	17.2	17.1
Veal	1.1	1.2	1.3	1.3	1.3	1.2	1.2
Pork	44.5	43.0	44.0	43.6	43.6	43.0	42.9
Poultry	-	21.8	21.8	21.4	21.6	21.7	21.9
Other	-	-	2.1	2.1	2.1	2.2	2.2
Total	-	-	88.4	87.2	87.0	85.3	85.3

**OAA projection

Source: Product Board for Livestock, Meat and Eggs

Meat consumption by Dutch consumers is primarily price driven. Sector representatives for cattle farmers, butchers and retailers, stated that the BSE crisis had only a limited effect on Dutch beef consumption (see report NL0074). During the fourth quarter of 2000, however, sales of beef declined by 6 percent. The main reason was probably the BSE crisis. This reduction was partly made up by the increased use of beef in snacks. In 2000, overall household purchases of beef and pork declined by 4 percent and 5 percent, respectively, while household purchases of veal (17%), sheep and lamb (26%), and poultry (2%) increased. The trend of eating easy to prepare meat products (6%) and snacks (5%) continued to rise, while sales of butcher shops declined.

During the first quarter of 2001, the trend of reduced sales of beef (6%) and pork (6%), and increased sales of sheep and lamb (9%), poultry (5%) and snacks (9%) continued. The sales of veal declined 20 percent. The reduction of household purchases of pork is probably due to the high price. Lower beef consumption is probably consequence of the BSE crisis.

There are indications that sales of organic beef increased 30 percent during the BSE crisis. It is expected that the growth of organic meat will be limited by the price sensitivity of Dutch consumers. Interestingly, the thriving Dutch economy is supporting increased consumption of beef and veal in restaurants.

Trade

Import

In 2000, the import value of beef and veal, (including live animals), increased 5 percent to EURO 0.78 billion. Beef imports from third countries, especially from Brazil, Argentina and Uruguay, remained stable. Beef imports from EU member states declined, especially from Germany. Dutch imports of cattle for slaughter purposes were particularly affected. During 2001, however, imports of cattle carcasses from Germany and Italy reportedly surged to about 3,000 to 4,000 per week. In Germany and Italy, an oversupply of carcasses exists due to the low beef consumption since the BSE crisis.

Export

Total Dutch export volume of beef and veal (value EURO 1.27 billion), including live animals, has decreased steadily over the last five years. Live cattle exports, predominantly animals for breeding and dairy production, remained relatively stable during this period. Despite the BSE crisis, exports of live cattle and veal increased during 2000, mainly to Eastern European countries and to countries in the Balkans. Dutch beef exports dropped nearly 10 percent, especially to third countries such as Russia and Iran. Dutch veal exports were affected by the BSE crisis at the end of 2000, especially to Germany and Italy. Note that the trade figures for veal during 2000 cannot be compared with previous years since weighing methods have been harmonized.

During 2001, exports of live cattle and beef and veal were negatively affected by the BSE and FMD crisis. From mid March to mid April, exports of meat and dairy products were halted. During the first 24 weeks of 2001, Dutch veal exports to main export markets were reduced by almost fifty percent to 54,000 MT (94,000 MT in 2000). For an overview of the implications of the FMD crisis on the Dutch livestock sector see report NL1053. Since the end of May, exports of live cattle have resumed and have reportedly surged due to the high costs of BSE testing in The Netherlands compared to other EU member states.

Policy and Marketing**Quality and Marketing**

The Product Board for Livestock, Meat and Eggs, in cooperation with the government and other agricultural organizations, developed the Integrated Quality Control (IKB) system. IKB is a quality assurance system to ensure safety and traceability through the whole production system, from raw materials for feed to slaughtering and processing of meat.

A study by the Animal Husbandry Research Station in Lelystad concluded that a 5 percent market share for organic beef is feasible in 2010 (equal to 25,000 head annually). During 2000, 5,800 head of organic cattle were slaughtered in The Netherlands compared to 5,100 in 1999. About 2,300 head were imported from Austria. The number of organic milk cows is estimated at about 40,000 animals.

On May 29, 2001 a commission to develop reforms in the Dutch livestock sector submitted its proposals to the Dutch Minister of Agriculture, Laurens Jan Brinkhorst (see report NL1037). One of the major conclusions of the report is that to rebuild consumer confidence in meat quality, the Dutch livestock sector must change from cost-driven production to quality-based production.

Biotechnology

In The Netherlands, most GM food ingredients have reportedly been eliminated from consumer foods and full acceptance of biotech foods by consumers is several years away. At the present time, the use of GM is primarily restricted to animal feeds, which has expanded due to the ban on meat and bone meal in feeds. While anti-GMO groups have tried to spark consumer resistance in this area too, they have mainly encountered indifference.

On June 25, 2001, the first in a series of public forums or "debates" on "Biotech and Food," was initiated (see report NL1012 and NL1048). The public forums are funded by the Dutch government to obtain consumer feedback concerning the use of biotechnology in food production. The entity organizing these events is the "Commission on Biotech and Food." The "Commission on Biotech and Food" will present the outcome of the debates to the Dutch Parliament in February 2002.

According to the PVE, the Dutch market is not influenced by the scientific safety of the technology (since the imported GM varieties meet EC regulations), but by their acceptance from Germany, the main export market. The PVE agrees that consumers should have the option of buying meat that was produced without GM feed but that two years are needed before non GM feed ingredients can be supplied in an amount sufficient for demand.

Veterinary Situation: BSE

Since 1997, twenty cases of BSE have been discovered in The Netherlands, the latest on August 23, 2001. In addition, two Dutch cows with BSE were found in the UK. On December 22, 2000, the Standing Veterinary Committee accepted the EC proposal to exempt The Netherlands and Denmark for the "Purchase and Destruction" scheme (the intervention and destruction program for non tested cattle older than 30 months). The Standing Veterinary Committee believed that The Netherlands has sufficient testing capacity and agriculture, the Minister, and the PVE are content with the EC decision.

Veterinary Situation: FMD

Between March 21 - May 10, 2001, 26 cases of FMD were confirmed. Most of the cases were found in the East of the country in the provinces of Gelderland and Overijssel. May 23, all vaccinated animals were killed. The total number of farms which were culled is estimated to be 1,750. By the end of June, the final number of animals killed in the controlled areas was estimated at 266,155 head, of which: 92,706 were cattle, 118,360 pigs, 34,918 sheep, 8,519 goats, and 11,652 other animals. The overall reduction in the livestock herd has been limited, for cattle and pigs 2 and 1 percent, respectively. For detailed information on this, see report NL1053.

Prices

In mid December 2000, prices appeared to have stabilized after the BSE crisis. During the period of FMD outbreaks, however, prices of veal tumbled. Research conducted by the Agricultural Economic Institute (LEI) revealed that the annual income of dairy farmers had stabilized at about EURO 22,500 per year. The LEI reported a steady increase of the income in the veal sector during the past years. The veal sector was, however, severely hit by the FMD crisis during March - May 2001.

The Netherlands: Animal numbers, cattle (1000 head)								
	1995	1996	1997	1998	1999	2000	2001	2002
Total Cattle Beg. Stks	4,588	4,557	4,366	4,292	4,200	4,200	3,900	3,725
Dairy Cows Beg. Stocks	1,449	1,444	1,387	1,416	1,588	1,520	1,475	1,450
Beef Cows Beg. Stocks	na	na	na	na	na	1,185	1,145	1,025
Production (Calf Crop)	2,207	2,154	2,158	2,043	2,019	1,660	1,650	1,665
Intra EC Imports	526	498	674	665	700	674	620	650
Other Imports	8	11	15	7	3	3	10	15
TOTAL Imports	534	509	689	672	703	677	630	665
TOTAL SUPPLY	7,329	7,220	7,213	7,007	6,922	6,537	6,180	6,055
Intra EC Exports	65	92	75	57	72	64	90	90
Other Exports	28	17	19	30	19	26	10	10
TOTAL Exports	93	109	94	87	91	90	100	100
Cow Slaughter	743	814	798	684	671	647	600	600
Calf Slaughter	1,198	1,196	1,351	1,373	1,399	1,386	1,180	1,180
Other Slaughter	438	390	354	355	261	214	175	175
Total Slaughter	2,379	2,400	2,503	2,412	2,331	2,247	1,955	1,955
Loss	300	345	324	308	300	300	400	300
Ending Inventories	4,557	4,366	4,292	4,200	4,200	3,900	3,725	3,700
TOTAL DISTRIBUTION	7,329	7,220	7,213	7,007	6,922	6,537	6,180	6,055
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	0	0

Source: Derived from figures of the Product Board for Livestock, Meat and Eggs and OAA's projections.

The Netherlands: Meat, beef and veal (1000 MT)								
	1995	1996	1997	1998	1999	2000	2001	2002
Slaughter (Reference)	2,379	2,400	2,503	2,412	2,331	2,247	1,955	1,955
Beginning Stocks	1	1	1	1	1	0	0	60
Production	580	581	565	535	515	471	423	435
Intra EC Imports	137	135	124	145	170	168	190	175
Other Imports	25	31	56	32	25	28	32	35
TOTAL Imports	162	166	180	177	195	196	222	210
TOTAL SUPPLY	743	748	746	713	711	667	645	705
Intra EC Exports	343	320	319	324	317	309	250	300
Other Exports	86	104	111	80	84	53	40	75
TOTAL Exports	429	424	430	404	401	362	290	375
Human Dom. Consumption	313	323	315	308	310	305	295	295
Other Use, Losses	0	0	0	0	0	0	0	0
TOTAL Dom. Consumption	313	323	315	308	310	305	295	295
Ending Stocks	1	1	1	1	0	0	60	35
TOTAL DISTRIBUTION	743	748	746	713	711	667	645	705
Calendar Yr. Imp. from U.S.	0	0	0	0	1	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	0	0

Source: Derived from figures of the Product Board for Livestock, Meat and Eggs and OAA's projections.

Swine and Pork

Production

The Netherlands - Swine - May Livestock Census (1,000 Head)						
	1997	1998	1999	2000	2001**	2002**
Total Number of Pigs	15,189	13,446	13,567	13,118	12,650	12,500
of which:						
piglets up to 20 kilos	5,996	5,094	5,239	5,104	4,900	4,700
slaughter hogs	7,433	6,591	6,774	6,505	6,300	6,100
breeding hogs	1,761	1,760	1,554	1,511	1,450	1,400

*December livestock census **OAA projections Source: Central Bureau for Statistics (CBS)

In 2000, the Dutch Minister of Agriculture, Laurens Brinkhorst, introduced a program by which subsidies are given to pig and poultry farmers who are closing down their farms. A large number of farmers used the opportunity to sell their farms. The December 2000 CBS livestock census revealed a decline of pig stocks by 2.4 percent, to 12.8 million animals. The number of breeding hogs declined by 2.8 percent which points to a further reduction in 2001. By the end of June, the final number of animals killed in the controlled areas due to FMD outbreaks was estimated at 266,155 head, of which 118,360 were pigs.

During 2000, the slaughter of hogs declined 5 percent to 18,600 animals, due to shrinking pig stocks in The Netherlands. Due to the shortage of pigs for slaughter, slaughterhouses are facing over capacity. During the first quarter of 2001, the slaughter of hogs was restrained by transport restrictions during the FMD crisis. Since the end of May, exports of live cloven hoofed animals resumed and surged to Germany and Italy where they were slaughtered. It is expected that the domestic slaughter will remain under the level of the previous year.

Consumption

During the year 2000, household purchases of pork declined by 5 percent supposedly due to relatively high prices. Meat consumption by Dutch consumers is primarily price driven. For more information on Dutch meat consumption see the chapter on cattle, beef and veal.

Trade

Import

During 2000, the value of Dutch imports of swine and derived meat products grew 22 percent to EURO 0.32 billion. Before 1999, the Dutch imports of live pigs were limited but they grew to 515,000 head in 2000. The rise in live pig imports, which consists mostly of slaughter hogs (464,000 animals), is explained by the need of the Dutch slaughterhouses to try to use excess capacity and low domestic supply. Dutch imports of pork meat increased 7 percent to 134,000 MT in 2000.

Export

The Netherlands is one of the world's five largest exporters of live pigs and pork, despite increasing restrictions by the Dutch government. During 2000, the value of Dutch exports of swine and derived meat products increased 20 percent to EURO 2.16 billion. In 2000, Dutch exports of live pigs rose by 8 percent to 4.6 million animals, mainly due to increased exports of piglets (3.2 million). The strong export of piglets is explained by an over supply of piglets in The Netherlands. As result of lower domestic supply of slaughter hogs, Dutch exports of slaughter hogs declined 3 percent to 1.4 million, main markets were Germany (40%), Spain (22%) and Italy (17%).

The world market for pork improved considerably during 2000. EU pork production declined and while demand in Eastern Europe, Russia and the Far East grew. Dutch exports, declined 3 percent, due to the decline in domestic production. A further reduction in exports is expected, especially to Greece and Italy, due to the increasing prices of Dutch pork. Dutch pork exports to the UK benefitted from the lower production in the UK and the strong British Pound. Dutch bacon exports to the UK rose from 126,000 MT to 134,000 MT in 2000. In Japan, although demand for pork is growing, Dutch exports declined 34 percent to 12,800 MT due to increased competition from the US and Denmark.

Due to FMD outbreaks, exports of live cloven hoofed animals were prohibited during mid March - mid May 2001. During the first 24 weeks of 2001, Dutch exports of slaughterhogs and piglets declined by 4 and 60 percent, respectively. Preliminary figures of the Product Board reveal a reduction of fifty percent of pork exports to 170,000 MT. Since the end of May, the ban on exports of cloven hoofed animals was released. Due to the limited domestic slaughter capacity and the large stock of animals the open EU borders led to intensive exports of live slaughterhogs, especially to Germany and Italy. Dutch pork exports are expected to recover from the FMD crisis, partly due to lower supplies in the UK and Spain. For an overview of the implications of the FMD crisis on the Dutch livestock sector see report NL1053.

Policy and Marketing**Environment**

In The Netherlands, intensive animal farming is constrained by environmental measures. On December 15, 2000, the parliament discussed the function and destination of the Dutch landscape (living, recreation, farming, nature etc.). It is anticipated that new measures will stop the further expansion of intensive animal farming, especially in natural areas. To reduce the present surplus of manure (21.5 million MT of phosphate), the Dutch government is allowing pig and poultry farmers to sell their farms to the government. In November 2000, the Ministry of Agriculture ended the first round of the buy-out program. The government bought a total of farms which would have produced 2.7 million MT of phosphate. The LEI expects that this will give their EU competitors cost advantage.

In January 2000, various organizations in the pig sector (such as the PVE), the Foundation Nature and Environment and Platform Biologica, a government organization to support Dutch organic production, agreed to cooperate to expand the organic stock of pigs to a total of 470,000 in 2005. Currently only about 0.6 percent of the pork supply is organic in The Netherlands produced by about 35 farmers. The slaughter number increased from 23,000 in 1999 to 28,000 head in 2000, and is expected to increase to 40,000 animals in 2001. The major limitations in the growth of organic pork production are the high investment to switch from regular production and the small margin. The cost price for organic pork is calculated at EURO 2.45 per kg slaughtered weight, and EURO 1.45 for regular pork, while the price to the organic farmer is only EURO 2.00 (cost price includes an average salary of the farmer).

Quality and Marketing

The Product Board for Livestock, Meat and Eggs (PVE) has started a research program to create a management program that can limit the infection frequency of Salmonella. Possible measures are separate slaughtering, treatment of water and feed, and disinfection after slaughtering. For more information on Quality and Marketing, see the chapter "Policy and Marketing on Cattle, Beef and Veal."

Veterinary Situation

For detailed information regarding FMD, see report NL1053.

Prices

During 2000, the price of slaughter hogs increased due to shrinking pig stocks in The Netherlands. As a result of the BSE crisis, EU consumption shifted due to consumption of pork which led to a further price increase during the first quarter of 2001. Since the FMD outbreak in The Netherlands, an export ban on meat and dairy products was imposed which led to a considerable price decline. Since the FMD outbreaks stopped, prices stabilized at the same level as one year ago. The LEI reported that the average annual family income declined from EURO 36,800 in 1996/1997 to a loss of EURO 27,300 in 1998/1999 and a loss of EURO 17,200 in 1999/2000. From 1998 until 2000, the financial position of a large number of pig farms deteriorated but the LEI expects a positive annual income of EURO 25,900 in 2000/2001.

The Netherlands: Animal numbers, swine (1000 head)								
	1995	1996	1997	1998	1999	2000	2001	2002
TOTAL Beginning Stocks	13,931	13,958	14,253	11,438	13,418	13,140	12,820	12,600
Sow Beginning Stocks	1,500	1,472	1,360	1,466	1,390	1,338	1,285	1,275
Production (Pig Crop)	27,272	27,789	28,561	29,270	29,092	28,693	27,585	27,355
Intra EC Imports	323	346	301	202	507	515	500	550
Other Imports	0	0	10	0	0	0	0	0
TOTAL Imports	323	346	311	202	507	515	500	550
TOTAL SUPPLY	41,526	42,093	43,125	40,910	43,017	42,348	40,905	40,505
Intra EC Exports	5,421	5,856	1,000	1,807	3,549	4,639	4,000	4,000
Other Exports	31	4	4	11	735	5	5	5
TOTAL Exports	5,452	5,860	1,004	1,818	4,284	4,644	4,005	4,005
Sow Slaughter	na	na	na	na	na	na	na	na
OTHER SLAUGHTER	18,616	18,480	15,312	19,277	19,554	18,564	17,800	18,100
Total Slaughter	18,616	18,480	15,312	19,277	19,554	18,564	17,800	18,100
Loss	3,500	3,500	15,371	6,397	6,039	6,320	6,500	6,000
Ending Inventories	13,958	14,253	11,438	13,418	13,140	12,820	12,600	12,400
TOTAL DISTRIBUTION	41,526	42,093	43,125	40,910	43,017	42,348	40,905	40,505
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	0	0

Source: Derived from figures of the Product Board for Livestock, Meat and Eggs and OAA's projections.

The Netherlands: Meat, swine (1000 MT)								
	1995	1996	1997	1998	1999	2000	2001	2002
Slaughter (Reference)	18,616	18,480	15,312	19,277	19,554	18,564	17,800	18,100
Beginning Stocks	5	5	5	5	93	135	135	307
Production	1,623	1,625	1,375	1,717	1,711	1,623	1,560	1,590
Intra EC Imports	111	110	148	107	125	134	100	100
Other Imports	0	0	0	0	0	0	0	0
TOTAL Imports	111	110	148	107	125	134	100	100
TOTAL SUPPLY	1,739	1,740	1,528	1,829	1,929	1,892	1,795	1,997
Intra EC Exports	1,000	954	761	975	975	952	750	1,065
Other Exports	50	91	91	70	125	113	50	75
TOTAL Exports	1,050	1,045	852	1,045	1,100	1,065	800	1,140
Human Dom. Consumption	684	690	671	691	695	692	688	688
Other Use, Losses	0	0	0	0	0	0	0	0
TOTAL Dom. Consumption	684	690	671	691	695	692	688	688
Ending Stocks	5	5	5	93	134	135	307	169
TOTAL DISTRIBUTION	1,739	1,740	1,528	1,829	1,929	1,892	1,795	1,997
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	0	0

Source: Derived from figures of the Product Board for Livestock, Meat and Eggs and OAA's projections.

Conversion rates:

1997 EURO 1.00 = US\$ 1.16, **1998** EURO 1.00 = US\$ 1.08, **1999** EURO 1.00 = US\$ 1.06
2000 EURO 1.00 = US\$ 0.92, **2001**, average June EURO 1.00 = US\$ 0.85

1997 US\$ 1.00 = Dfl. 1.89, **1998** US\$ 1.00 = Dfl. 2.03, **1999** US\$ 1.00 = Dfl. 2.07
2000 US\$ 1.00 = Dfl. 2.39, **2001**, average June US\$ 1.00 = Dfl. 2.58

Acronyms used in Report	
Dutch	English
AID = Algemene Inspectie Dienst	General Inspection Service
CBS = Centraal Bureau voor de Statistiek	Central Bureau for Statistics
COV= Centrale Organisatie voor de Vleessector	Central Organization for the Meat Sector
IKB = Integraal Ketenbeheer	Integrated Quality Control
LEI = Landbouw Economisch Instituut	Agricultural Economic Institute
PVE = Produktschap Vee, Vlees en Eieren	Product Board for Livestock, Meat and Eggs
RVV = Rijksdienst voor de keuring van Vee en Vlees	National Inspection Service for Livestock and Meat
Stichting Natuur en Milieu	Foundation Nature and Environment