



THE MAIN STIMULANT TO increasing demand for eggs and poultry in the Netherlands, is generic promotion which is conducted by the Produktschap voor Pluimvee en Eieren—the Poultry and Eggs Commodity Board. There is little brand promotion of either eggs or poultrymeat.

Since the inception of the EEC, the Produktschap, which represents the interests of both management and worker sectors of the Dutch poultry industry, has limited its activities to three main roles:

- Collecting statistics for the industry and the government and helping in the implementing of EEC legislation.
- Acting as a spokesman for all who make a living from poultry.
- Promoting poultrymeat and eggs as well as providing finance for certain poultry research projects.

Although the government makes a contribution of around 1.7 million guilders to the Produktschap's total annual income, budgeted at 11.3 million guilders for 1980 against 12.2 million last year, the bulk of the money is raised from levies on hatching eggs and on hen

THE NETHERLANDS

Egg and Poultry Promotion

and broiler processing plants. However, the total raised in this way has declined from more than 9.0 million guilders in 1978 to an estimated 7.9 million this year. The levies are a legal obligation, nonpayers being taken to court.

On the expenditure side of the balance sheet, the biggest item is salaries accounting for 3.94 million guilders in 1979 and as much as 4.4 million guilders this year.

This exceeds promotion, the total budget for this year being only 3.2 million guilders—2.5 million guilders to be spent on poultrymeat promotion and less than 0.7 million guilders on eggs.

No money is spent on television, this medium being considered too costly. Hence, the promotional money is mainly divided between radio commercials, trade journals, housewives' magazines, recipe leaflets and point-of-sale material for display in the larger shops.

Egg consumption in the Netherlands increased by nearly 3% last year from 185 to 190 eggs per person, reversing the downward trend evident since 1975, though the current level is well below the 203 eggs per person achieved in 1970.

Poultrymeat consumption also increased in 1979 to a record 8.7 kg per person though, in this case, the trend has been upwards throughout the second half of the seventies.

The third major item of expenditure in the Produktschap's budget is the subsidising of poultry research and in particular, health projects. The 1980 budget for this work is put at 2.4 million guilders.

Chairman of the Produktschap voor Pluimvee en Eieren is J. T. Mellema.



Although he considers that the Produktschap plays an important role in providing statistics, a political voice and promotion for the Dutch industry, Mellema acknowledges that it would be extremely difficult to raise more money for his Board's budget. This is because such a high proportion (about two thirds) of Dutch egg and poultrymeat output is sold outside the Netherlands. For large operators, the home market may account for only a third of their total sales, hence they have a strong argument against increasing the Produktschap's promotional expenditure.

Mellema agrees that the WIR investment law has been a factor favouring the expansion of the egg sector but he finds it hard to believe that the Dutch government have now excluded the poultry industry from the benefits of this legislation, when it is only a part of the Dutch tax system.

He believes that the Dutch Ministry of Agriculture gave in because of the political pressure from other EEC countries. In his view it was wrong to look at just one aspect of a country's tax system and he feels that it would have been better for the EEC to have looked at ways of trying to harmonise the tax on farmers. Mellema maintains that, at present, the Dutch and the Danes are probably paying the highest taxes in the Community.

In West Germany, farmers and companies are taxed differently. Nevertheless, he considers that the Dutch egg industry will continue to be highly competitive within the EEC and he has no doubts that it will maintain its egg trade with West Germany, if not expand it.

With regard to poultrymeat he is

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Table 1:

Structure of the Dutch laying flock—1979

Flock size	1978		1979	
	Farms	Hens	Farms	Hens
100-1000	2022	647720	1689	53165
1001-2000	416	573000	336	461450
2001-3000	330	790350	285	682050
3001-5000	480	1817950	388	1482700
5001-10000	620	4274400	569	3984650
10001-15000	289	3404450	279	3302450
15001-20000	141	2358550	182	3079950
20001-25000	67	1454450	97	2085400
25001-35000	59	1707950	85	2458200
35001-50000	42	1731000	43	1778750
50001-and over	38	3326700	60	4863550
Total	4504	22086520	4013	24712315

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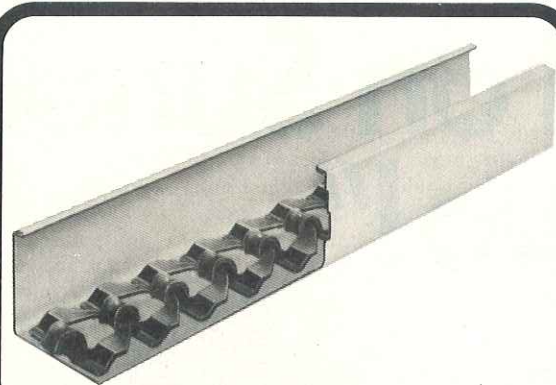


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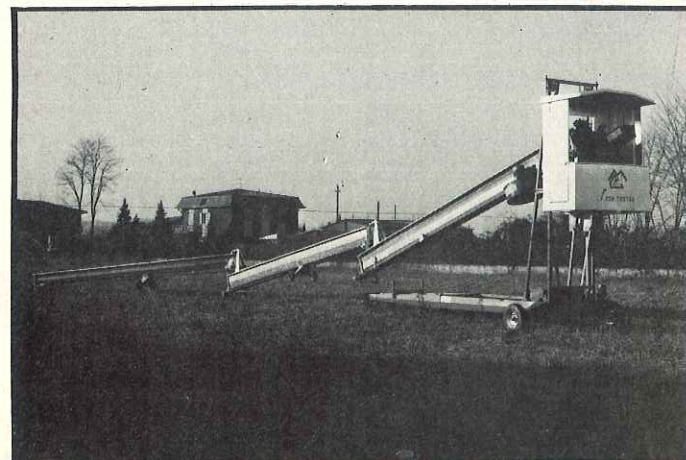


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little less confident of the competitive position. This is particularly true in the areas of cutting up and further processing as, in these more labour intensive sectors, the Dutch are not competitive with West Germany on labour costs.

One of the major problems facing eggmen throughout the EEC at present is the question of poultry welfare. There is well organised opposition to the battery system in many West European countries and the Netherlands is no exception. The ratio between battery and floor systems in the Netherlands is roughly 80:20.

Mellema does not think that the Commission would be looking to make sweeping changes here. There will however, be some changes which he believes will be related to the recommended cage size or feed space per bird. Indeed, he would welcome certain changes in this area considering that in some instances, producers are housing birds too intensively e.g. six birds per cage when five would give a better laying house performance.

However, while he is sure there will be amendments to harmonise the cage system throughout the Community, he is at a loss to suggest ways in which these can be policed. Again, as with the implementation of many EEC regulations, he foresees problems of ensuring uniform application of any cage legislation.

Regarding the further enlargement of the EEC, Mellema views the prospect of Spanish membership with concern, considering that this will magnify the problems facing the EEC egg industry, since Spain is more than self-sufficient in eggs and will therefore contribute to the EEC surplus of this commodity. He considers that there should be a prolonged transition period before Spain becomes a full member of the Community.

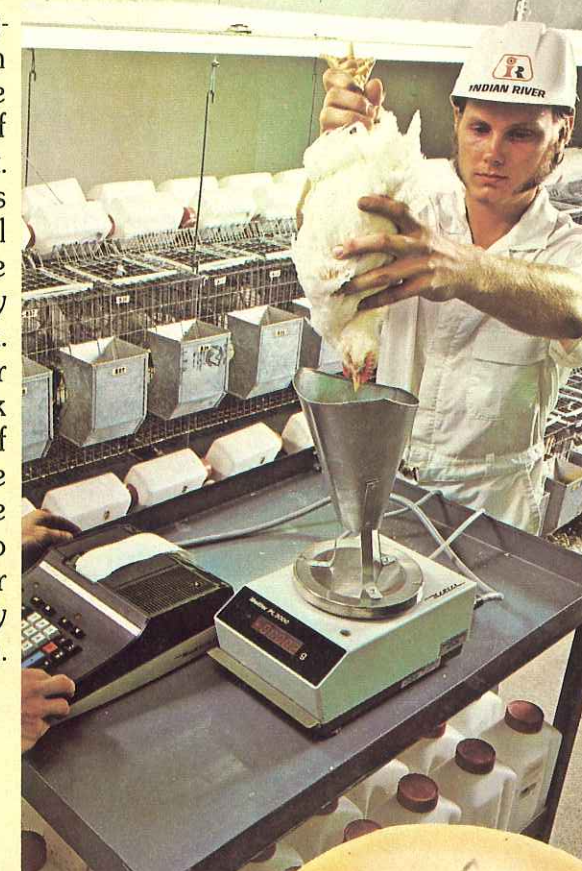
Switching to poultrymeat production within the EEC, Mellema is particularly concerned about the large expansion taking place in France, the bulk of which
(Continued on page 16)

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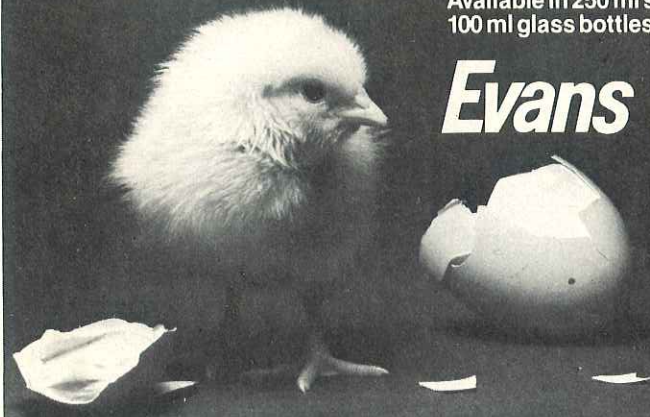
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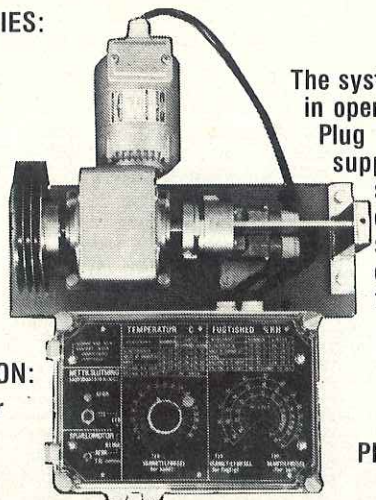
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is intended for Third countries. Last year, France exported some 173 000 tonnes of poultrymeat compared with 126 000 tonnes in the previous year. Of the total in 1979, nearly 79% went to Third countries compared with 72% in 1978.

Such a large volume of Third country exports is sure to act as a drain on the EEC's export restitution fund. With a further large increase in French exports envisaged this year, there is the possibility that either there will be insufficient funds to meet the export restitution requirement or that the amount paid per kilo may be reduced. Should this happen or the Third country trade fail to materialise, then French broilermen could be left with large quantities of chicken meat on their hands. This would almost certainly, have to be unloaded on the West German market with disastrous consequences for the Dutch broiler grower.

Egg production in the Netherlands is booming and could continue to do so for some time as the Dutch aim to capture an increasing share of the West German Market.

Back in 1976, the output of eggs for human consumption just failed to reach 5000 million. In the following year it totalled 5356 million expanding yet again in 1978 to 6382 million eggs. Then, in 1979, production leapt up by more than 17% to 7492 million eggs and it appears that at present, the trend is still upwards.

Of the 24.7 million layers on farms last year, 21.6 million or 87% were found on the largest 1315 laying units, all with flocks of more than 5000 birds (table 1). In the previous year there were 1256 units in this flock-size category and they accounted for less than 82% of all layers. So, the Dutch laying flock is becoming concentrated into fewer hands.

The increase in the number of larger flocks is highlighted by the analysis of flocks with more than 5000 layers. This reveals that there were 60 flocks of over 50 000 birds in 1979 accounting for a total of 4.9 million layers or nearly a fifth of the national flock. The corresponding figures in 1978 were 38 flocks and 3.3 million birds.

There are some large co-operatives and a few large independent egg producers. The majority of producers are tied to some form of contract, though the proportion, estimated at around 60%, is considerably less than that for broilers or turkey production.

The proportion of white to brown egg layers varies from year to year but is roughly 60:40 in favour of white strains.

The average price paid to producers during the past two years has failed to match the "peak" of 2.28 guilders per

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kilo or 13.10 guilders per 100 class four eggs, paid in 1977. Indeed the average producer return on class four eggs last year was only 11.10 guilders per 100 eggs compared with 12.82 guilders in 1976. Yet the average price for layers rations rose by 6% during this period from 54.90 guilders per 100 kg in 1976 to 58.30 guilders in 1979. At these prices it is difficult to see how Dutch eggmen have been able to finance the expansion which has taken place.

The number of registered egg packing stations is slowly declining, the total in December last year was 682 compared with 704 two years earlier.

Of the 7492 million eggs produced in 1979, some 4270 million or 57% were exported in shell, domestic consumption of 2656 million eggs representing only 35% of production (table 2).

West Germany was the leading buyer taking 3305 million eggs or 77% of total exports. EEC countries purchased 3745 million, hence, sales to Third countries of 525 million eggs accounted for only 12% of exports (table 3). Nevertheless, this latter trade has increased steadily from the 1977 level of 256 million eggs.

Middle East States are the main Third country outlets. In 1979 the United Arab

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Table 2:

Egg consumption in the Netherlands in 1979

	Millions
Production of eggs for consumption	7492
Exports	
Eggs for consumption	4270
Egg product (shell egg equivalent)	727
Total exports	4997
Imports	
Eggs for consumption	142
Egg products (shell egg equivalent)	94
Total imports	236
Net exports	4761
Available for home consumption	2731
Wastage say, 1%	75
Domestic consumption	2656
Human population	14.0 million
Egg consumption/person/year	190

Table 3:

Exports of shell eggs for human consumption (millions)

Country	1977	1978	1979
West Germany	2132	2775	3305
France	81	173	162
United Kingdom	10	9	117
Italy	1	94	83
Belgium/Luxembourg	22	38	78
Total EEC	2246	3089	3745
Total Third countries	256	319	525
of which:			
United Arab Emirates	2	20	100
Algeria	1	119	96
North Yemen	—	15	57
Saudi Arabia	3	16	55
Iran	145	23	22
Egypt	—	2	17
Austria	9	12	14
Grand total	2502	3408	4270

Emirates was the main buyer taking 100 million eggs followed by Algeria with 96 million.

As home production has expanded, so the quantity of eggs for human consumption imported into the Netherlands has declined. Hence, total imports last year of just under 142 million eggs was below the previous year's 155 million and well down on the 1977 figure of 266 million eggs. The bulk (80%) of last year's imports came from three countries, Belgium, West Germany and Finland.

The Netherlands, apart from being the top egg exporting country in the world, is also the leading exporter of egg products.

Output from less than a dozen breaking-out plants last year totalled 56 164 tonnes, though this was lower than in the previous two years as the following table shows.

Of the total produced last year, some

51 467 tonnes were manufactured from home-produced second quality and surplus first quality eggs, the remaining

Year	Albumin	Yolk	Whole egg	Total
1974	14416	8365	22547	45328
1975	12391	8490	23743	44624
1976	14371	8330	25266	47967
1977	15248	9085	33682	59015
1978	15261	9449	33716	58426
1979	14594	9704	31866	56164

4696 tonnes coming from imported shell eggs.

Domestic demand accounted for 18 476 tonnes of products in 1979, of which, 4061 tonnes were albumin, 4496 tonnes yolk and 9918 tonnes whole egg. Exports of egg products in 1979 amounted to 28 315 tonnes with West Germany taking 16 206 tonnes.

—Terry Evans

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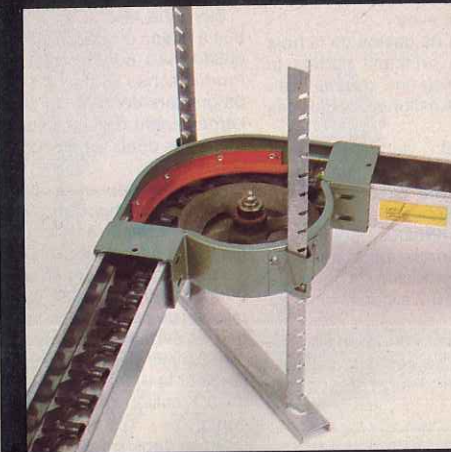
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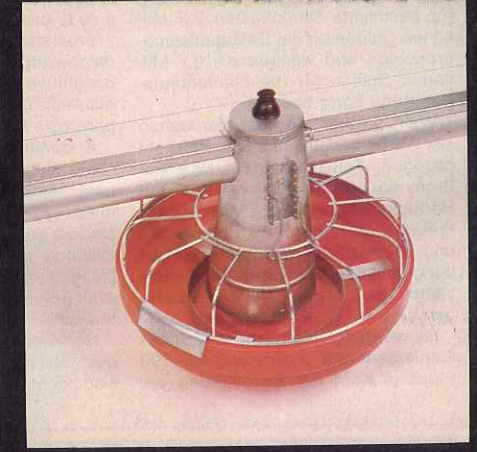
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