

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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POLICY

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Approved By:

Susan Phillips

Prepared By:

Bob Flach

Report Highlights:

EU cattle slaughter and beef production are forecast to fall in 2018. But a further reduction of milk prices could elevate slaughter, beef production and exports for the remainder of this year. EU pork production is expected to significantly increase in 2018 based on the favorable market conditions during the first three quarters of 2017. Current stagnating exports to China and a weak demand on the German market force producers to seek for alternative markets.

Executive Summary

Cattle & Beef

The dairy herd is shrinking due to environmental restrictions, in particular in the Netherlands, and the phasing out of the least productive animals and farms throughout the EU. The Irish dairy cow herd is an exception; it has expanded since the abolishment of the milk quotas in 2015. While the EU beef cow herd shrunk in 2017, a expansion is reported in Spain and Central Europe. Factors for an expanding beef cow herd are Member State subsidies, local demand for high quality beef and export demand for live cattle. For 2018, a reduction of slaughter and beef production is anticipated but plummeting milk prices could cause slaughter to elevate again. All the same, due to good demand from foreign markets, and stocks, EU beef exports are expected to remain on the highest level reported since 2011.

Swine & Pork

During the second half of last year, EU piglet and carcass prices fell from well above to below the five-year average. The market is in particular depressed in Germany, the biggest producer in the EU. Slaughter is shifting from the Western Europe (Germany, Denmark, France and Belgium) to Southern (Spain) and Central Europe (Poland). Stable and relatively low feed prices, improved production efficiency, high carcass prices and growing local and export demand buoyed pork production in Spain and Poland. But in Poland a further spread of African Swine Fever is looming. The elevated piglet production during mid-2017 and ongoing expansion of the sow herd is forecast to elevate slaughter during the first three quarters of this year. With the weak domestic demand, absence of the Russian market and increased competition on the Asian market, the sector is actively seeking for export diversification. If exports will stagnate at the 2017 level, stockpiled volumes will further depress the market.

Policy

The negotiations of the European Commission (EC) with Mercosur (Argentina, Brazil, Uruguay and Paraguay) are ongoing. While Mercosur asked duty-free access for reportedly at least 130,000 MT of beef the EC offered 99,000 MT. The CETA agreement has been enforced since September 21, 2017, and incrementally allows EU duty-free access for about 53,000 MT of Canadian beef and 75,000 MT of Canadian pork. The EC and Canada are still negotiating the veterinary details of the trade deal. On the EU meat export side, the EU and Japan came to a political agreement on December 8, 2017. It has been agreed that over a 15-year period, tariffs for beef will be reduced from 38.5 percent to 9 percent, and for fresh pork almost abolished.

Cattle

| Animal Numbers, Cattle | 2016 | | 2017 | | 2018 | |
|-------------------------------|------------------|-------------|------------------|-------------|------------------|-------------|
| | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| European Union | | | | | | |
| Total Cattle Beg. Stks | 89,152 | 89,152 | 89,078 | 89,152 | 89,030 | 88,445 |
| Dairy Cows Beg. Stocks | 23,595 | 23,594 | 23,507 | 23,525 | 23,485 | 23,319 |
| Beef Cows Beg. Stocks | 12,312 | 12,312 | 12,346 | 12,342 | 12,400 | 12,273 |
| Production (Calf Crop) | 30,050 | 30,100 | 30,030 | 29,450 | 30,080 | 29,400 |
| Total Imports | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Supply | 119,202 | 119,252 | 119,108 | 118,602 | 119,110 | 117,845 |
| Total Exports | 997 | 997 | 1,000 | 1,051 | 1,010 | 1,100 |
| Cow Slaughter | 11,913 | 11,868 | 11,950 | 11,900 | 11,850 | 11,750 |
| Calf Slaughter | 6,697 | 6,762 | 6,730 | 6,600 | 6,780 | 6,600 |
| Other Slaughter | 8,658 | 8,634 | 8,600 | 8,780 | 8,700 | 8,800 |
| Total Slaughter | 27,268 | 27,264 | 27,280 | 27,280 | 27,330 | 27,150 |
| Loss | 1,859 | 1,839 | 1,798 | 1,826 | 1,800 | 1,795 |
| Ending Inventories | 89,078 | 89,152 | 89,030 | 88,445 | 88,970 | 87,800 |
| Total Distribution | 119,202 | 119,252 | 119,108 | 118,602 | 119,110 | 117,845 |
| (1000 HEAD) | | | | | | |

Not Official USDA data. Source: Eurostat and FAS Offices in the EU.

The EU dairy cow herd shrinks due to production limitations in the Netherlands.

During 2012–2015, the EU cattle herd increased but expansion began to flatten out in 2016. By 2016, the dairy herd had begun to contract. The most significant reductions were reported in the Netherlands and France, while the herd continued to expand in Ireland. The reduction of the Dutch dairy herd was the most significant. On February 1, 2017, the Dutch Government enforced the Phosphate Plan by which total phosphate emissions from the dairy sector had to be reduced to the maximum permitted level in 2017. For more information see GAIN report [NL7006 - New Phosphate Reduction Plan Sets Limits to Dutch Dairy Production, published on February 9, 2017](#). The enforcement of the plan resulted in record slaughter levels. During 2017, the Dutch dairy cow herd was cut by about 100,000 head, for a total of 1.8 million. It should be noted that the government detected fraudulent registration of animals at possibly 2,100 Dutch dairy farms. As a consequence official statistics may overestimate the reduction of dairy cows in the Netherlands. The French dairy cow herd also continues to shrink as the least competitive farmers phase out their older cows or excess heifers. In contrast, the Irish dairy sector has profited from the dairy market liberalization and has continued to increase the herd since the abolishment of the milk quotas in 2015.

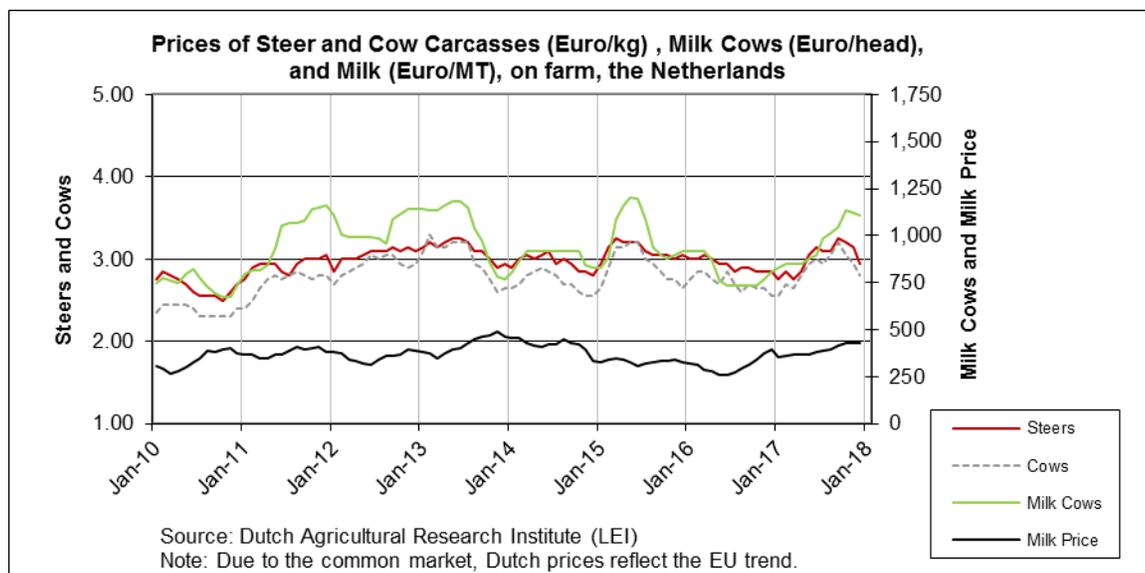
Due to increased competition farms are switching from dairy to beef cattle.

While the EU beef cow herd shrunk in 2017, expansion of the beef cow herd continues in Spain and throughout Central Europe. Farmers are switching from dairy to beef cows due to the increased competition on the dairy market since the milk quotas have been abandoned. EU subsidies for beef and veal production (except in Germany, Ireland, Luxembourg and Cyprus), the local demand for high

quality beef, and the export demand for live cattle is driving increased beef production. EU exports of cattle rose most significantly to Turkey and Russia. In June 2017, the Spanish sector opened the Turkish market and according to the industry, it will become the second most important destination for Spanish live cattle exports. Exports from France are still banned from most markets because of the presence of Bluetongue (BT) disease and a new agreed upon protocol on BT between France and Turkey is not expected to bring French exports back to speed again this year.

With sustained milk prices, slaughter is forecast to decline in 2018.

As forecast in the Annual Report, cattle slaughter increased during 2017 as a result of elevated slaughter of dairy cows during the last two months of the year. Restructuring of the dairy herd was expected to elevate slaughter levels, but due to the relatively high price of milk farmers held on to their cattle for as long as possible. In 2018, a reduction of slaughter is forecast, but a significant reduction of milk prices could boost another increase in slaughter. The total cow herd combined fell last year, which is forecast to result in a lower number of calves in 2018, resulting in a significant decline of the total cattle herd.



Beef

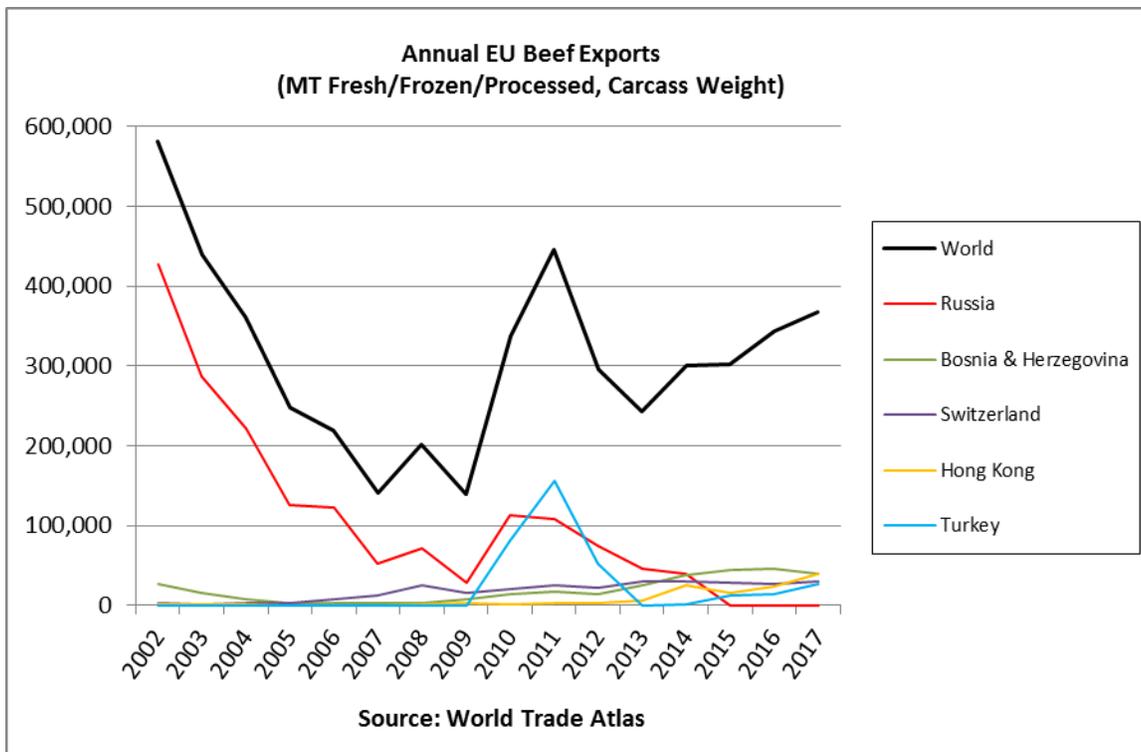
| Meat, Beef and Veal | 2016 | | 2017 | | 2018 | |
|-----------------------|---------------|----------|---------------|----------|---------------|----------|
| | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| Slaughter (Reference) | 27,268 | 27,264 | 27,280 | 27,280 | 27,330 | 27,150 |
| Beginning Stocks | 0 | 0 | 0 | 0 | 0 | 0 |
| Production | 7,881 | 7,880 | 7,890 | 7,900 | 7,900 | 7,855 |
| Total Imports | 369 | 368 | 340 | 338 | 360 | 340 |
| Total Supply | 8,250 | 8,248 | 8,230 | 8,238 | 8,260 | 8,195 |
| Total Exports | 344 | 344 | 400 | 367 | 420 | 370 |
| Human Consumption | 7,906 | 7,904 | 7,830 | 7,871 | 7,840 | 7,825 |
| Other Use, Losses | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Consumption | 7,906 | 7,904 | 7,830 | 7,871 | 7,840 | 7,825 |

| | | | | | | |
|----------------------------|-------|-------|-------|-------|-------|-------|
| Ending Stocks | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Distribution | 8,250 | 8,248 | 8,230 | 8,238 | 8,260 | 8,195 |
| (1000 HEAD) ,(1000 MT CWE) | | | | | | |

Not Official USDA data. Source: Eurostat and FAS Offices in the EU.

In 2018, beef production is forecast to decline for the first time in five years.

Since 2012, the cow herd has expanded, and the calf crop and slaughter has increased. In 2017, EU beef production rose for the fourth successive year. Official slaughter statistics reported a reduction of slaughter during the first ten months of the year. But with the elevated slaughter of dairy cows during the last two months, beef production increased in 2017. This is supported by the relatively high slaughter weights of dairy cows. Based on the anticipated reduction of slaughter, beef production will decline this year. An increase of beef production through 2016-2018 is only anticipated in Ireland and Poland.



While total demand for beef is falling, there is a shortage of high quality beef.

EU consumers are eating less beef resulting in a slackening of domestic demand and as a result, the elevated beef production was exported to third countries. The export volume of 367,000 MT CW is the highest level reported since 2011. In 2017, exports rose most significantly to Hong Kong, Turkey and the Philippines. Due to strong demand from foreign markets, and the stockpiled volumes, EU beef exports are expected to remain high in 2018. In contrast to dairy cow beef, demand for high quality beef remains good, in particular in Germany, but the supply is limited by quotas. In 2009, the EU reached a Memorandum of Understanding with the United States, by which a zero duty quota for 48,200 MT high quality grain fed beef was implemented. Currently, the quota is fully used but less than 40 percent is supplied by the United States, as other producers became eligible. Beef imports from Canada could

potentially increase in the future. The provisional implementation date of the Canada – EU Trade Agreement (CETA) was September 21, 2017, but the build-up of eligible production takes time before exports can start to flow.

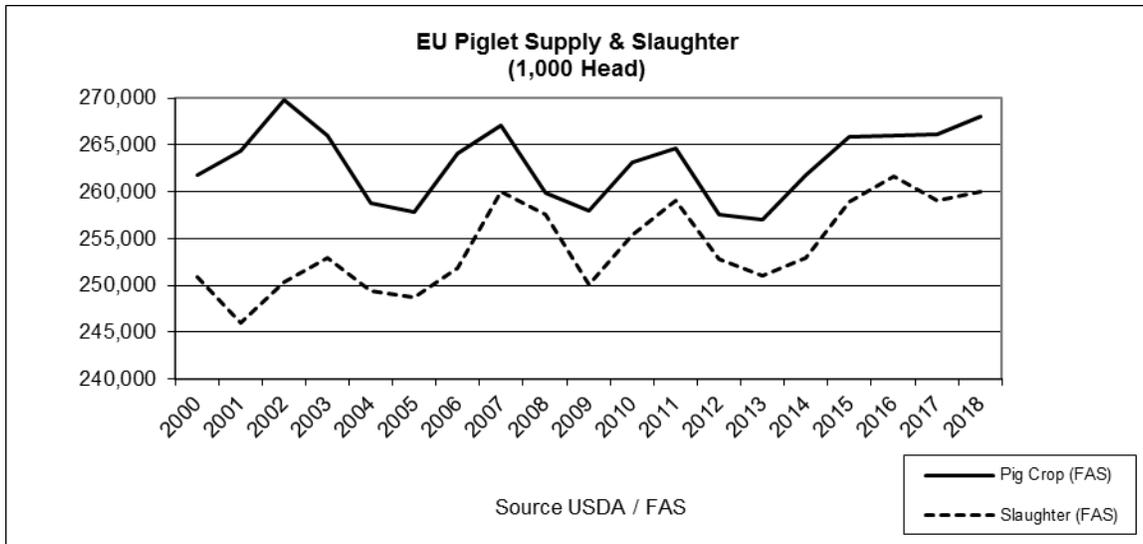
Swine

| Animal Numbers, Swine | 2016 | | 2017 | | 2018 | |
|-------------------------------|------------------|-------------|------------------|-------------|------------------|-------------|
| | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| European Union | | | | | | |
| Total Beginning Stocks | 148,716 | 148,716 | 147,240 | 147,188 | 147,200 | 150,112 |
| Sow Beginning Stocks | 12,293 | 12,293 | 12,046 | 12,022 | 12,040 | 12,189 |
| Production (Pig Crop) | 265,000 | 266,000 | 265,200 | 267,500 | 265,000 | 271,500 |
| Total Imports | 3 | 3 | 4 | 6 | 4 | 5 |
| Total Supply | 413,719 | 414,719 | 412,444 | 414,694 | 412,204 | 421,617 |
| Total Exports | 281 | 288 | 250 | 340 | 250 | 350 |
| Sow Slaughter | 4,124 | 4,124 | 4,030 | 4,020 | 4,100 | 4,150 |
| Other Slaughter | 256,104 | 257,505 | 254,970 | 254,680 | 254,700 | 259,350 |
| Total Slaughter | 260,228 | 261,629 | 259,000 | 258,700 | 258,800 | 263,500 |
| Loss | 5,970 | 5,614 | 5,994 | 5,542 | 6,114 | 5,617 |
| Ending Inventories | 147,240 | 147,188 | 147,200 | 150,112 | 147,040 | 152,150 |
| Total Distribution | 413,719 | 414,719 | 412,444 | 414,694 | 412,204 | 421,617 |
| (1000 HEAD) | | | | | | |

Not Official USDA data. Source: Eurostat and FAS Offices in the EU.

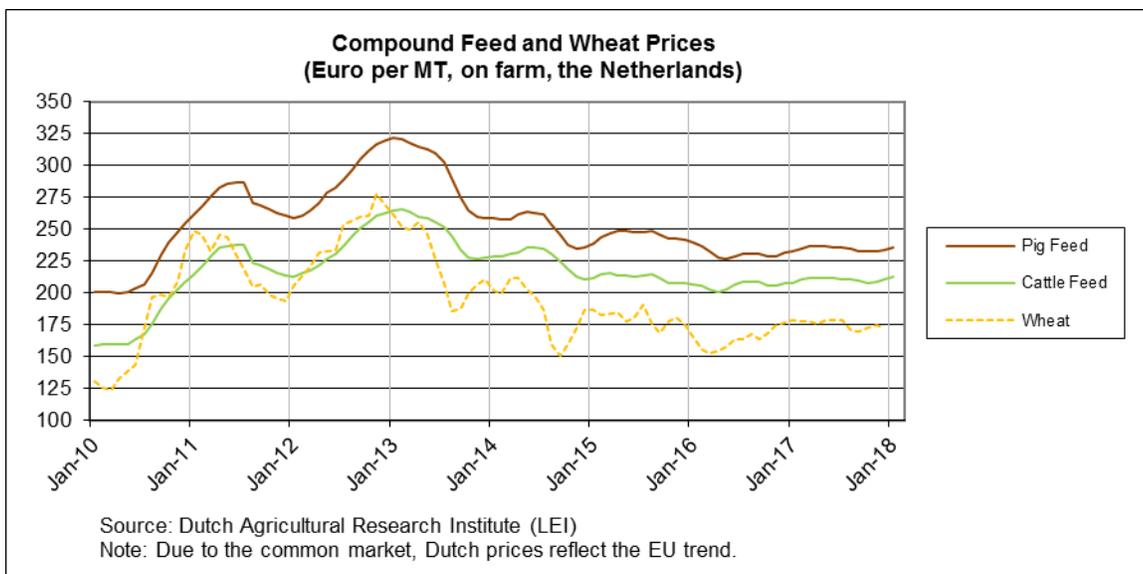
In 2017, slaughter fell due mainly to reductions in Germany and Denmark.

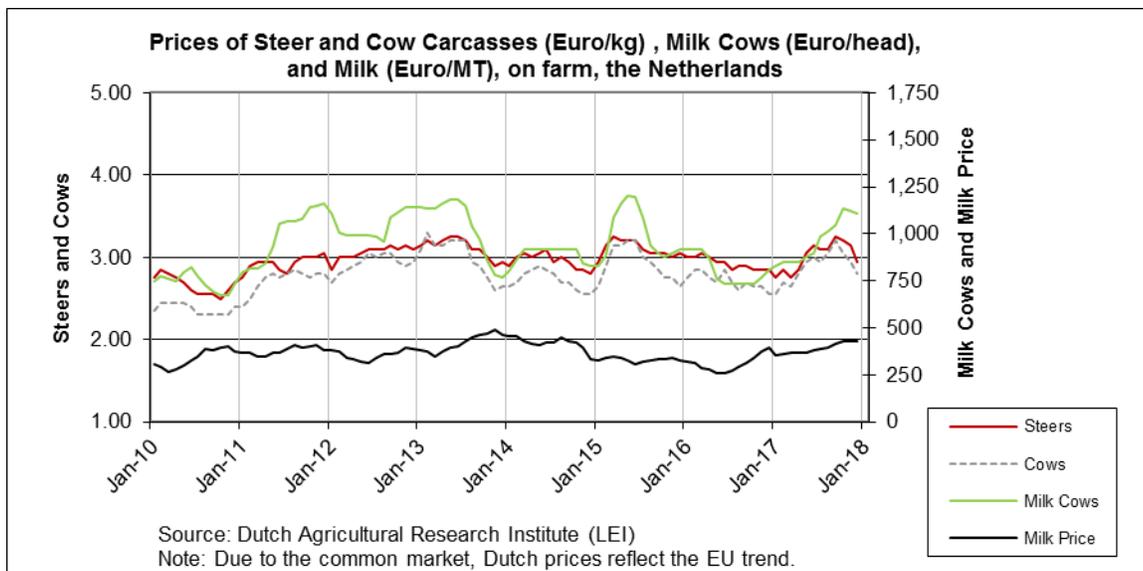
The final balance over 2016 revealed a slight underestimation of sow productivity. A further improvement of the piglet to sow ratio is extended through 2017 and 2018, which is resulting in higher piglet production than forecast in the Annual Report. EU slaughter in 2016 is adjusted to a higher level in line with revised official Spanish slaughter figures. As forecast in the Annual Report, EU swine slaughter fell to about 259 million head in 2017. Slaughter dropped by about 1.2 million head in Germany and about 0.9 million head in Denmark. German pork farmers continue to be under pressure due to an oversupply of pork on the market as domestic demand decreases and discussions about animal welfare are further depressing the market. In addition, a further spread of African Swine Fever (ASF) from Poland is looming. Danish production of piglets increased, but a growing portion was exported and not fattened nor slaughtered in Denmark. Of the about 14.5 million Danish piglet exported in 2017, about 50 percent were destined to Germany and about 40 percent to Poland. The Danish sector expects that the trend of increasing piglet exports and falling domestic slaughter will continue.



Increased productivity will support an increase in slaughter this year.

In 2017, slaughter rose by about 0.7 million head in Spain and 0.4 million head in Poland. In 2017, the Spanish swine sector benefited from stable and relatively low feed prices, improved production efficiency, high carcass prices and growing local and export demand. The low feed prices and favorable carcass prices also benefited the Polish sector but detections of ASF in eastern and northeastern Poland hamper further expansion of the sector. Market conditions are similarly favorable in the United Kingdom, but uncertainty over Brexit makes forecasting difficult. For more information on the Spanish and Polish livestock sector see the specific country reports listed further down, which can be downloaded from the public [FAS GAIN report database](#).





The elevated supply of piglets produced in the summer and autumn of 2017 will result in a recovery of slaughter during the first half of this year. The Eurostat December census reports a 1.4 percent increase in the number of covered sows compared to the 2016 census. The most significant increases were reported in Spain, Poland, the Netherlands and Denmark. This sow stock is forecast to set the piglet crop and slaughter at record levels in 2018. Nearly all of the expansion of slaughter will be realized in Spain and Poland.

Pork

| Meat, Swine | 2016 | | 2017 | | 2018 | |
|---|---------------|----------|---------------|----------|---------------|----------|
| | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| European Union Slaughter (Reference) | 260,228 | 261,629 | 259,000 | 258,700 | 258,800 | 263,500 |
| Beginning Stocks | 0 | 0 | 0 | 0 | 0 | 0 |
| Production | 23,523 | 23,866 | 23,400 | 23,675 | 23,350 | 24,050 |
| Total Imports | 12 | 12 | 13 | 14 | 13 | 15 |
| Total Supply | 23,535 | 23,878 | 23,413 | 23,689 | 23,363 | 24,065 |
| Total Exports | 3,125 | 3,125 | 2,800 | 2,857 | 2,800 | 2,900 |
| Human Consumption | 20,410 | 20,753 | 20,613 | 20,832 | 20,563 | 21,165 |
| Other Use, Losses | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Consumption | 20,410 | 20,753 | 20,613 | 20,832 | 20,563 | 21,165 |
| Ending Stocks | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Distribution | 23,535 | 23,878 | 23,413 | 23,689 | 23,363 | 24,065 |

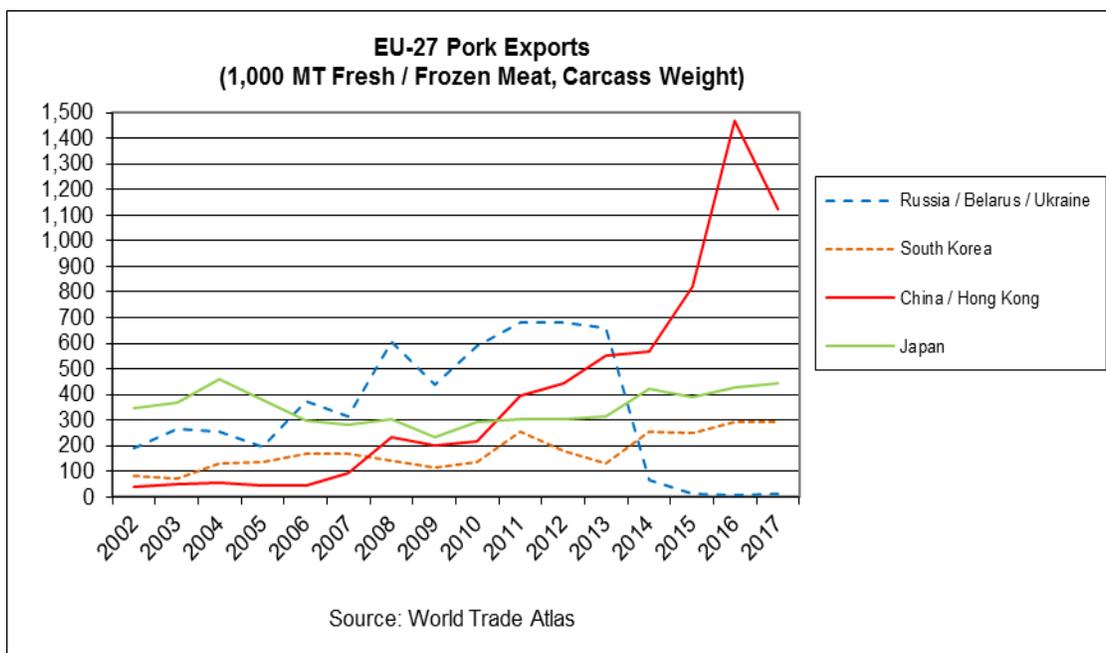
(1000 HEAD) ,(1000 MT CWE)

Not Official USDA data. Source: Eurostat and FAS Offices in the EU.

The EU swine sector is seeking alternative export markets.

As outlined in the Swine Chapter, official slaughter figures report a one percent reduction in 2017. The decline of pork production was tempered by increasing slaughter weight through the year. While pork production fell by about 190,000 MT CW, exports plummeted by about 270,000 MT CW. This export

plunge caused an oversupply of pork on the EU market, which has temporarily been stored awaiting a recovery in demand from foreign markets. With the weak domestic demand, the absence of the Russian market, and increased competition on the Asian market, the sector is eager to open new markets elsewhere. In 2017, producers have been able to expand exports to the United States (30,000 MT CW), Japan (20,000 MT CW) and the Philippines (20,000 MT CW), but not enough to make up for the reduction in demand from China (400,000 MT CW). In 2018, the strategic markets for Spain, the main exporter in the EU, will be South America, mainly Mexico, Colombia and Chile, and India. On July 5, 2017, the EC and Japan announced they had come to a political agreement. The trade deal with Japan will reportedly open the market for lower value parts and higher-end processed swine products, but SPS issues still have to be decided upon, and the ratification procedure for such an agreement generally last two years.



EU pork production faces limited domestic demand and increased foreign competition.

While slaughter is expected to peak during the first half of this year, a larger sow stock and increased productivity is expected to maintain high piglet production and slaughter throughout 2018. As domestic consumption of pork is on the decline a significant volume of pork is likely to end up in cold storage. An exception is Spain where consumption increased due to improved demand by restaurants and tourism. Pork consumption, in particular, is under pressure in the main market, namely Germany. In 2016 and 2017, German pork consumption fell by about 100,000 MT CW annually, and is expected to decline further by 70,000 MT CW in 2018. Exports to China have gradually recovered since May 2017, but a substantial expansion of exports to China is not likely based on increased supply from competitors and a strong Euro against the US\$. In this scenario of limited exports sales, and an oversupply of pork on the domestic market, prices for hogs and piglets will likely fall.

Policy

New CAP Likely to Continue Coupled Direct Payments for Beef

Since recent months, discussions between the EC and stakeholders on the next Common Agricultural Policy (CAP) have started. The EU beef sector and cattle farmer groups in several EU Member States made statements about the importance of the EU coupled supports for their sector. Farmers are particularly eager to highlight the increased pressure on their sector from new beef import quotas that the EU intends to grant in free trade negotiations with countries in South-America (Mercosur), Australia and New Zealand.

EC Negotiations with Mercosur (Argentina, Brazil, Uruguay and Paraguay)

Mercosur still continues to push the EC for higher beef quota concessions, with the lowest numbers floating above 130,000 MT. It is understood that such a new quota would come on top of all existing EU beef import quota for both high quality beef, as well as for beef for processing. The last round of negotiations ended on February 9, 2018 without any agreement on key issues, such as quotas on Mercosur beef; however, the EU's last offer increased the beef quota from 77,000 MT to 99,000 MT and it is reported that the block may have accepted this. Some commentators predict that an agreement may be reached by early March.

Implementation of the EU-Canada Trade Agreement (CETA)

The CETA, enforced on September 21, 2017, incrementally allows EU duty-free access for fresh and chilled Canadian beef starting with 5,140 MT in year one increasing to 30,840 MT CW from year six onwards. An additional 4,160 MT CW from the EU-Canada MOU on hormone beef will be added from the start. A second quota for frozen beef will open incrementally starting at 2,500 MT CW and reaching 15,000 MT CW from year six onwards. Furthermore, Canada will receive a waiver for the 20 percent duty for the 11,500 MT Hilton beef quota that it shares with the United States. For bison, Canada receives a new 3,000 MT quota, while it will also be able to ship bison duty-free under the Hilton quota. For pork, Canada gained a duty-free quota with 12,500 MT CW annual increments totaling 75,000 MT CW from year six. This comes on top of Canada's existing country-specific quota of 5,549 MT CW. Negotiations between the EC and Canada on the veterinary details of the FTA are ongoing.

Implementation of the EU-Japan Free Trade Agreement (FTA)

On December 8, 2017, the EU and Japan announced that they had come to a political agreement on an FTA. Tariffs for beef will be reduced from 38.5 percent to 9 percent, and for fresh pork almost abolished over a 15-year period. The formal U.S. withdrawal from the Trans Pacific Partnership (TPP) in January 2017 seems to have allowed the EU to reverse its backlog on trade with Japan. European farm industry leaders cheer this agreement with this second largest and most affluent export destination in the growing Asian market.

Presence and Impact of African Swine Fever (ASF)

After the first ASF outbreak occurred in Lithuania and Poland in early 2014, the disease spread to the North also infecting Latvia and Estonia. At the end of June 2017, ASF was detected in the wild boar population in the Czech Republic and early August it was found in backyard pigs in Romania close to the Ukrainian border. Before the latest outbreaks, the impact of ASF on EU pork exports was limited to Poland and the Baltic States. But because many importing countries, especially China, do not accept EU regionalization, the spread of ASF could have a devastating effect on EU pork exports.

Brexit Will Impact Irish Beef Sector Whatever the Future Trade Relationship

Of the half million metric tons of Irish beef exports, about 270,000 MT are exported to the United Kingdom annually. Under the least disruptive future trade scenario, the Brexit impact may remain limited to a price impact only, which already occurred when the British pound exchange rate fell sharply upon the invocation of Article 50 of the EU Lisbon Treaty officially launching the procedure for the United Kingdom leaving the EU. In a worst-case scenario, much of this Irish beef surplus may need to find other markets within the EU or beyond. This may have inevitable ramifications for global beef trade flows. In December 2017, the EU Livestock and Meat Trade Association (UECBV) published an [impact report](#) analyzing the consequences of the worst-case Brexit scenario without a trade agreement with the EU.

DISCLAIMER

The numbers in the PSDs in this report are not official USDA numbers, but they result from a collaborative effort by FAS EU offices to consolidate PSDs from all 28 EU member states.

This report is the result of active collaboration with the following EU FAS colleagues in the following member states:

Xavier Audran from FAS Paris covering France
Ornella Bettini from FAS Rome covering Italy
Mila Boshnakova from FAS Sofia covering Bulgaria
Monica Dobrescu from FAS Bucharest covering Romania
Dimosthenis Faniadis from FAS Rome covering Greece
Bob Flach from FAS The Hague covering the Netherlands and Nordic countries
Gellert Golya from FAS Budapest covering Hungary and Slovenia
Steve Knight from FAS London covering the United Kingdom and Ireland
Roswitha Krautgartner from FAS Vienna covering Austria
Jana Mikulasova from FAS Prague covering the Czech Republic and Slovak Republic
Andreja Misir from FAS Zagreb covering Croatia
Yvan Polet from FAS Brussels covering EU Policies, Belgium and Luxembourg
Leif Rehder from FAS Berlin covering Germany
Piotr Rucinski from FAS Warsaw covering Poland, Estonia, Latvia and Lithuania
Carmen Valverde from FAS Madrid covering Portugal and Spain

NOTE

In this report the following HS codes and conversion factors are used:

| | HS codes | Conversion factors |
|-------------|--|---------------------------|
| Beef | 0201, 0202 | PW X 1.40 = CW |
| | 021020, 160250 | PW X 1.79 = CW |
| Pork | 0203, 021011, 021012, 021019, 160241, 160242, 160249 | PW X 1.30 = CW |

PW = Product Weight CW = Carcass Weight

ABBREVIATIONS

EC: European Commission
 EU: All twenty-eight Member States of the European Union.
 MS: An EU Member State
 NMS: The thirteen new Member States which joined the EU in May 2004, January 2007 and July 2012

Livestock Related reports from FAS Posts in Europe:

| Country | Title | Date |
|----------------|---|-------------|
| Spain | Exports are the driving forces of the Spanish Animal Production | 02/01/18 |
| Romania | New Romanian African Swine Fever Detection | 01/30/18 |
| EU | High Quality Beef Quota Fill Under Fierce Import Competition | 01/24/18 |
| EU | European Meat Trade Association Publishes Brexit Impact Study | 12/26/17 |
| Poland | Annual Livestock Report | 11/27/17 |
| EU | High Quality Beef 2017-18 Quota Second Quarter Fills in One Month | 11/13/17 |
| Spain | Spanish pork captures Asian market share | 11/09/17 |
| Bulgaria | Livestock and Products Annual | 10/26/17 |
| Slovakia | American Foods Promotion in Slovakia Levies Economic Boom | 10/04/17 |
| EU | EU Livestock Annual | 09/12/17 |
| Romania | African Swine Fever Detected in Romania | 08/15/17 |
| Germany | Animal Welfare Takes Center Stage | 07/13/17 |
| Czech R. | African Swine Fever Occurrence in the Czech Republic | 07/03/17 |
| Turkey | Turkish Subsidy Program for Beef Breeding and Livestock Continues | 04/28/17 |
| Spain | Record year for Spanish swine and cattle production | 04/26/17 |
| Turkey | Udder Excitement about New Bovine Genetics Import Regulations | 04/05/17 |
| Ukraine | Livestock and Products Semi-Annual | 03/15/17 |
| Poland | Good prospects for higher imports of U.S. bovine genetics to Poland | 03/14/17 |
| EU | Livestock and Products Semi-Annual | 03/01/17 |
| Netherlands | New Phosphate Reduction Plan Sets Limits to Dutch Dairy Production | 02/09/17 |
| Germany | Agricultural Turnaround starts with Animal Welfare | 02/01/17 |

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-For additional livestock market related information, please contact:

Bob Flach (FAS The Hague)

Phone: ++31 70 310 2303

E-mail: bob.flach@fas.usda.gov

-For additional livestock policy related information, please contact:

Yvan Polet (FAS Brussels U.S. Mission to the EU)

Phone: ++32 2 811 4095

E-mail: yvan.polet@fas.usda.gov