

4.4.8 Netherlands

4.4.8.1 Demographics

Out of an estimated 731 poultry farms in the Netherlands, about 85%, or 619 farms, were commercial chicken farms. The next largest share of poultry farms were duck farms, accounting for 8% or 60 poultry farms. Approximately 5% or 11 of the total poultry farms in the Netherlands were turkey farms. Household or micro-producer chicken farms represented 2% or 11 poultry farms (Figure 149).

Poultry production in the Netherlands increased since 2010, while poultry consumption has declined. In 2019, poultry production totaled 1.0 million metric tons, a 21% gain compared to 2010 (see Figure 150). Consumption totaled 64,753 metric tons in 2019, reflecting a 70% decrease from 2010.

Of the 113.2 million head in the Netherlands' poultry stocks, 101.9 million were chickens, 9.2 million were turkeys, and 2.2 million were ducks (See Table 43). Since 2010, chicken stocks increased 1%, and chicken slaughter increased 25%. Poultry slaughter in the Netherlands totaled 626.0 million head in 2020. An estimated 597.5 million chickens were slaughtered, representing % of the total poultry slaughter. Turkeys represented the second largest share of poultry slaughter with 20.3 million head. Duck slaughter was an estimated 8.2 million head.

Poultry production included 996,000 metric tons of chicken, 167,000 metric tons of turkey, and 18,000 metric tons of ducks.

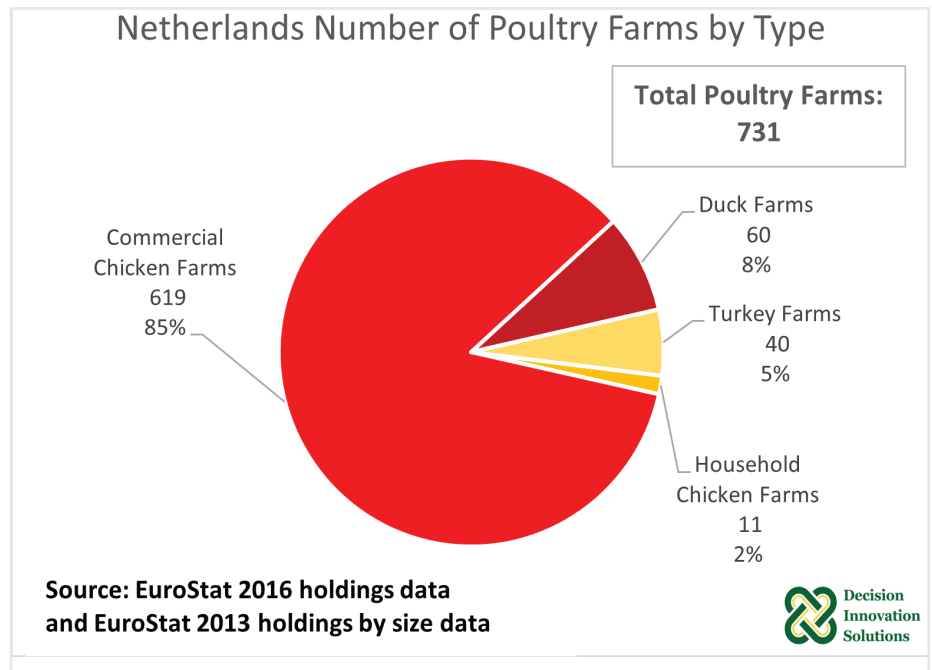


Figure 149. Netherlands number of poultry farms by type

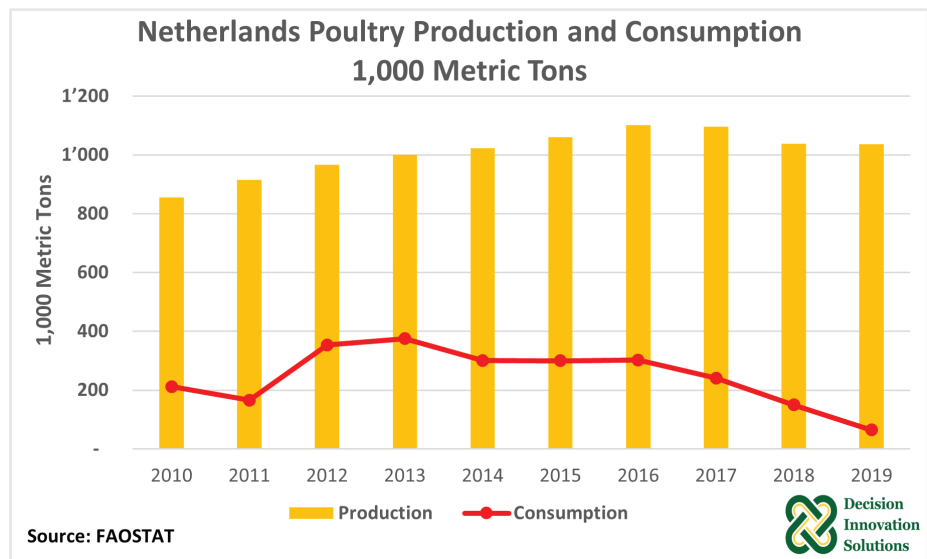


Figure 150. Netherlands poultry production & consumption

| NETHERLANDS POULTRY STOCKS, SLAUGHTER, AND PRODUCTION | | | | |
|---|----------|-------|---------|---------|
| 1,000 head | Chickens | Ducks | Turkeys | Total |
| Stocks | 101'863 | 2'171 | 9'208 | 113'242 |
| Producing Animals/Slaughtered | 597'529 | 8'197 | 20'305 | 626'031 |
| Production (1,000 MT) | 996 | 18 | 167 | 1'181 |

Sources: FAO, 2020

Table 43. Netherlands poultry stocks, slaughter & production

4.4.8.2 GDP and Value of Production

The GDP of the Netherlands was valued at \$912.2 billion in 2020 with agricultural production representing about 2% of the total GDP. More than \$9.9 billion was derived from the red meat production sector which represented 1% of the total GDP. Crop production also represented about 1% of GDP with \$6.0 billion in contributions. Less than 1% of the total GDP was represented by chicken production. Turkey production also represented less than 1% of the total GDP and was valued at \$88.9 million (Figure 151).

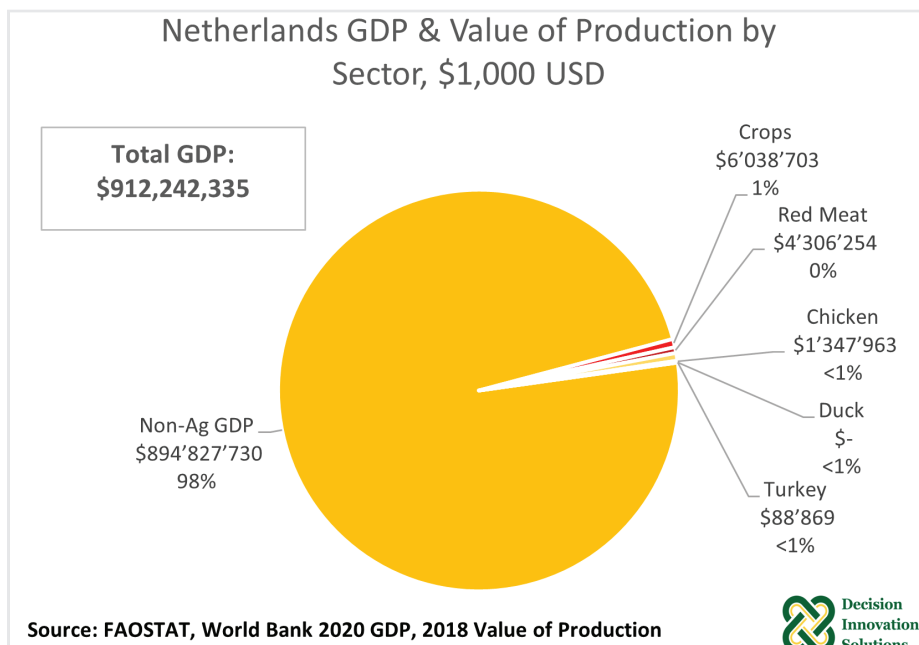


Figure 151. Netherlands GDP & value of production by sector

The combined (direct and indirect) effects of agricultural production in the Netherlands are estimated to be \$40.3 billion. Of this amount, \$3.8 billion comes from the poultry industry, with \$3.6 billion from chicken meat production and \$235 million from turkey production. Agriculture pays a net value of \$382 million in taxes, \$30 million of which is estimated to be from the poultry industry (Table 44).

| ECONOMIC EFFECTS - NETHERLANDS (\$1,000 USD) | | | | |
|--|--------------|--------------|--------------|-------------|
| | Direct | Indirect | Total | Taxes paid* |
| All agriculture | \$17'414'605 | \$22'868'972 | \$40'283'577 | \$381'999 |
| Livestock | \$11'375'902 | \$14'938'908 | \$26'314'810 | \$249'536 |
| Poultry | \$1'436'832 | \$2'370'773 | \$3'807'605 | \$29'934 |
| Chicken | \$1'347'963 | \$2'224'139 | \$3'572'102 | \$28'083 |
| Duck | - | - | - | - |
| Turkey | \$88'869 | \$146'634 | \$235'503 | \$1'851 |

Source: FAOSTAT, OECD Input-Output Tables. *Taxes is equal to total taxes net of subsidies

Table 44. Economic effects - Netherlands

4.4.8.3 Labor

The total number of individuals in the labor force in the Netherlands was 9.5 million in 2020 (Table 45). Approximately, 53%, or 5.0 million, were male and 47%, or 4.4 million, were female.

The agricultural sector employed 178,629 individuals in 2020. Approximately 72,405 individuals were employed in the poultry production industry.

| AGRICULTURAL LABOR FORCE CHARACTERISTICS - NETHERLANDS | | | |
|--|-----------|---------------------|-----------|
| | Total | Female | Male |
| Total Country Labor | 9'490'523 | 4'441'774 | 5'048'749 |
| Non-Agricultural Labor | 9'311'894 | 4'390'146 | 4'921'748 |
| Agricultural Labor | 178'629 | 51'628 | 127'001 |
| Total Non-Poultry Agricultural Labor | 106'224 | | |
| Total Poultry Labor | 72'405 | | |
| Chicken Labor | 14'101 | | |
| Turkey Labor | 29'152 | | |
| Other Poultry Labor | 29'152 | | |
| | | Wages (\$1,000 USD) | |
| Total Meat Processing Labor | 15'731 | \$680'348 | |
| Livestock Processing Labor | 11'795 | \$510'135 | |
| Poultry Processing Labor | 3'936 | \$170'213 | |

Source: ILO 2020, World Bank 2020, UNIDO Database, INDSTAT 4 2021, ISIC Revision 3

Table 45. Agricultural labor force characteristics - Netherlands

Turkey production and "other" poultry labor accounted for the highest shares of jobs within the poultry production industry with 29,152 or 40% of the total for each. The remaining 20% or 14,101 individuals employed in poultry production worked in chicken production.

Meat processing labor totaled 15,731 jobs and \$680.3 million in wages earned. Livestock meat processing was the largest share of meat processing jobs with 11,795 jobs and \$510.1 million in wages earned. Poultry meat processing accounted for 3,936 jobs and \$170.2 million in wages earned.

4.4.8.4 Cost of Production

The Netherlands' cost of feed represented the largest share of broiler production total costs (61%). Day-old chicks was the second largest cost component at 17%, followed by the variable costs of heating, electricity, litter, and animal health (10%). Around 10% came from housing (6%) and labor (4%). The costs at farm level for insurance, bookkeeping, consultancy, telephone, and transport represented 1% of total costs. The Netherlands also had an added cost related to manure disposal accounting for 1% of total cost (Figure 152).

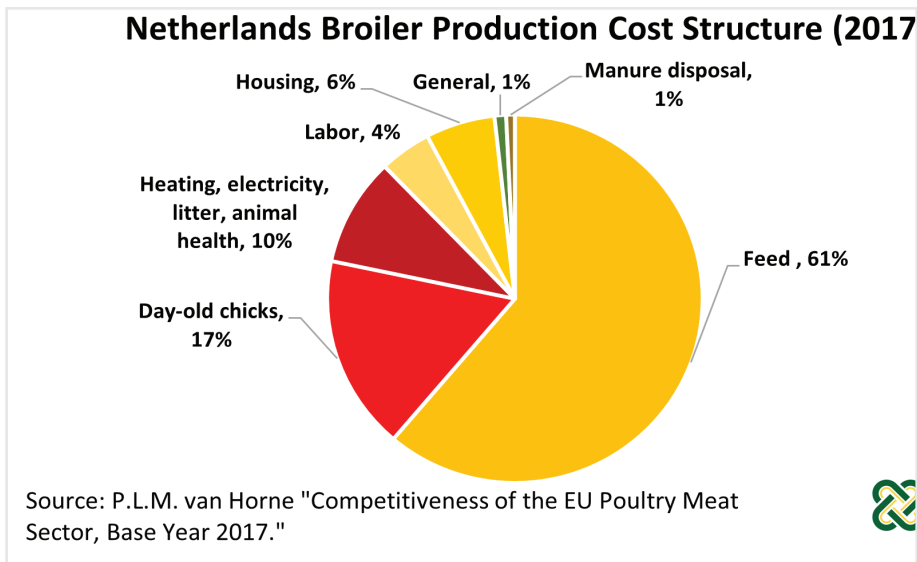


Figure 153. Netherlands broiler production cost structure

4.4.8.5 Trade

The United Kingdom was the main destination for the Netherlands' poultry meat exports in 2020. The Netherlands exported about 241,719 MT of poultry meat to the United Kingdom valued at \$772.5 million. The value of poultry meat exported by the Netherlands to its top ten destinations was estimated at \$2.6 billion in 2020, which made up about 86% of its total value of exports that year (see Figure 153 and Figure 154).

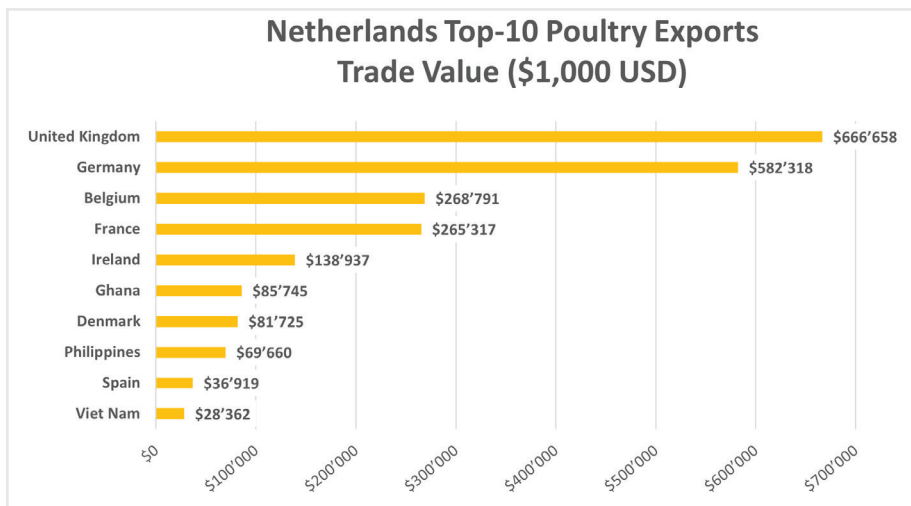


Figure 152. Netherlands top 10 poultry exports, trade value

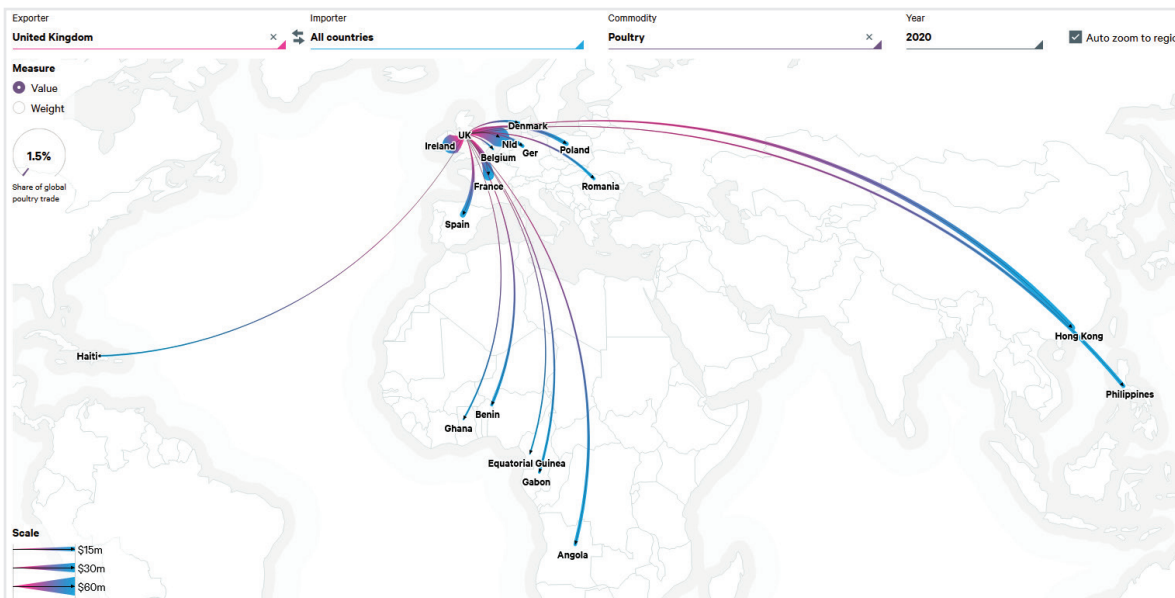
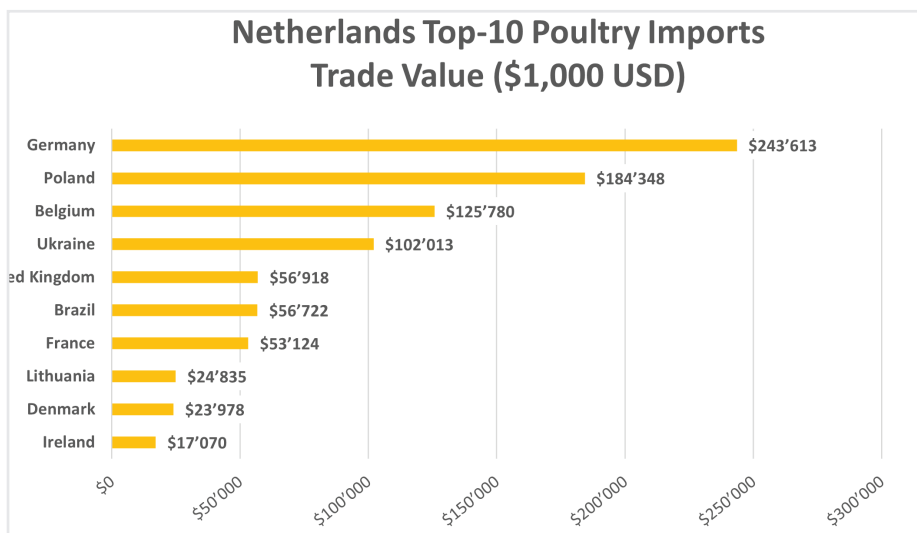


Figure 154. Netherlands poultry export flows



The value of poultry imports by the Netherlands from its top ten suppliers was estimated at \$888.4 million equivalent to 541,393 MT in 2020. Almost 60% of the value of poultry imported by the Netherlands was from three countries Germany, the main supplier, Poland, and Belgium (see Figure 155 and Figure 156).

Figure 155. Netherlands top 10 poultry imports, trade value

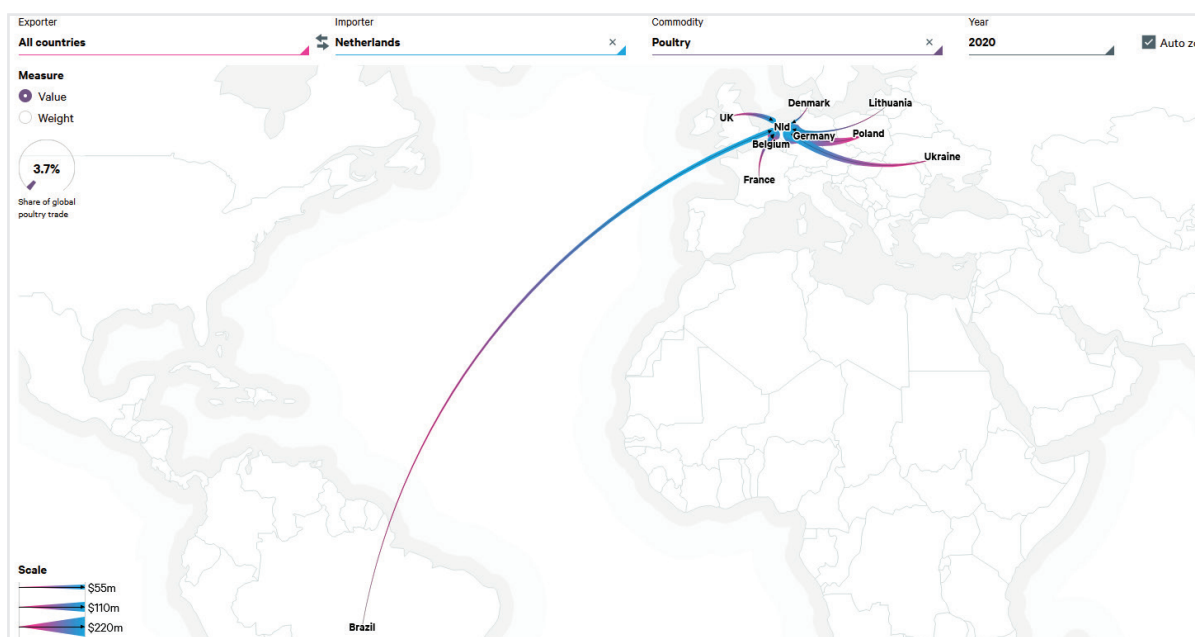


Figure 156. Netherlands poultry import flows