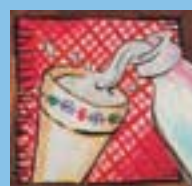




Productschap
Zuivel



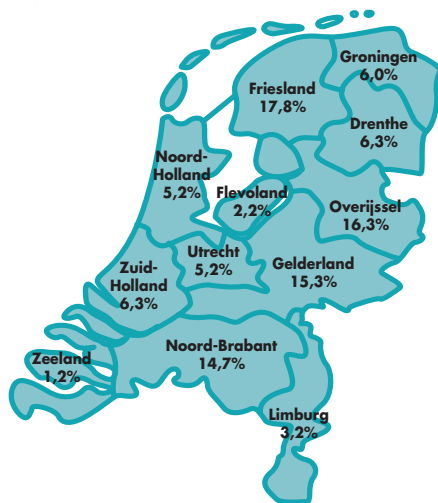
D U T C H D A I R Y B O A R D

The Dutch dairy sector

The Dutch Dairy Board (PZ) operates on behalf of the Dutch dairy sector. Around 21,000 dairy farms produce almost 11 billion kg of milk, with in total 1.4 million dairy cows and 180,000 dairy goats. Approximately 55% of agricultural land in the Netherlands is used for dairy farming.

The bulk of the milk is processed into cheese (50%), butter, powdered milk, condensed milk, fresh milk products and speciality products by 51 dairy factories. A small proportion of the milk is used for on-farm processing.

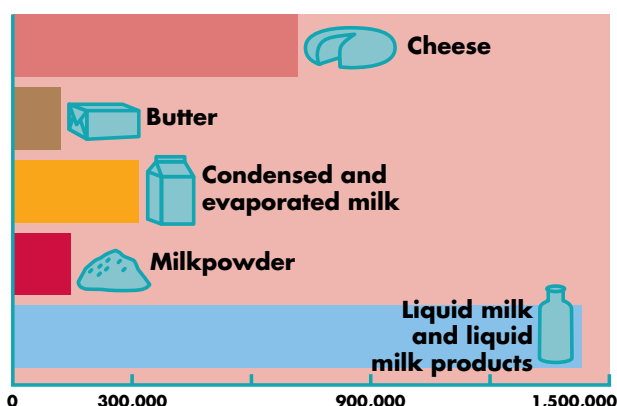
Geographical distribution of milk production



In the whole sale trade about 300 specialised companies are active, many of them worldwide. Almost 6,000 retail outlets are involved in trade in dairy products. The dairy sector as a whole provides 62 thousand jobs.

The breakdown of the consumption of Dutch dairy products is as follows: the Netherlands 40%, other EU countries 40% and non-EU countries 20%.

Production of (x 1,000 kg)



Organisations

Legislation relating to statutory organisations such as the Dutch Dairy Board has been in place since the 1950s. This was the period following the Second World War when the Netherlands was rebuilding its social structure and there was a general consensus that added value could be achieved by collective efforts. The Dutch Dairy Board was established in 1956.

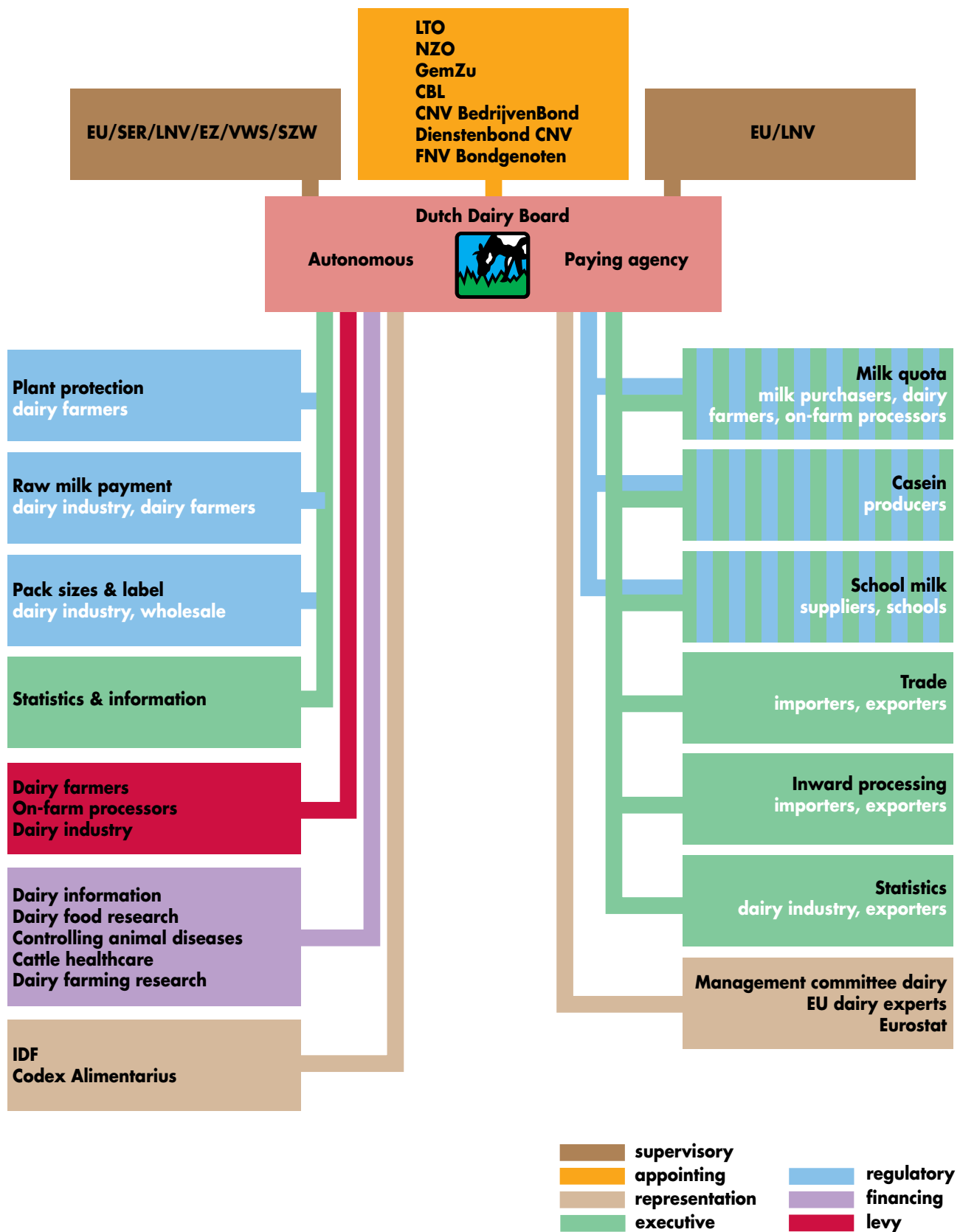
The Dutch dairy sector is highly organised, each segment in the production chain having its own organisation to represent its interests.

Within the Board the farmers are represented by the Dutch Association for Agriculture and Horticulture (LTO), the dairy industry by the Dutch Dairy Association (NZO), traders by the Joint Dairy Federation (GemZu) and the retail by the Dutch bureau for Provision Trade (CBL). The trade unions FNV Bondgenoten, CNV BedrijvenBond and Dienstenbond CNV represent the workforce.



In the field of milk quality assurance, control and animal health some specialised organisations are active on instruction of the Board: the Netherlands Controlling Authority for Milk and Milk Products (COKZ) and the Animal Health Service Deventer (GD).

Relations and activities Dutch Dairy Board





Dutch Dairy Board

The Board of Governors of the Dutch Dairy Board includes representatives of employers and employees from every segment of the Dutch dairy sector, covering dairy farming, the dairy industry and the wholesale and retail trade in dairy products. The president is appointed by the Crown and has an independent position. The Board has a workforce of almost 100 employees.

The Board has regulatory powers. This means that the Board can impose regulations with which all dairy farmers, dairy processors and traders must comply. Levies are imposed to finance promotion, research, animal healthcare and quality projects.

In addition to serving as a platform for discussion of developments in national and international dairy policy, the Board also acts as an information and knowledge centre for the dairy sector in the Netherlands. The information available includes market and price data, regulations and production and trade statistics.



The Board is also accredited by the Ministry of Agriculture, Nature and Food Quality (LNV) as a delegated body of the national paying agency, responsible for the implementation of the majority of European Union market regulations relating to the dairy sector. Examples of these are the superlevy regulations, the import and export regulations for dairy products and the subsidy for school milk. In implementing these regulations, the Board provides the sector with added value by supplying the requisite information and giving optimum service.

Departments

Policy Affairs

Facilitates dairy farming research, is fully involved in developments relating to quality control in the dairy sector and dairy food legislation and initiates labour-related studies in close co-operation with employers and trade unions in the dairy sector.

Information

Collects, analyses and presents data relating to the dairy sector, both in the Netherlands and abroad. The information available includes data on markets and prices, regulations and production and trade statistics. Reporting is either in a standard format or on a more trailer-made basis.



Trade Regulations

Implements regulations relating to the import and export of dairy products. The department evaluates and processes applications for export refunds, issues import and export licences and implements the regulations on inward processing relief and those with regard to seagoing vessels and aircraft. The department has a help desk for queries relating to veterinary trade restrictions.

Sector Regulations/COS

Implements the milk quota regulations and a number of subsidy regulations. The department evaluates and processes quota transactions, registers individual milk quotas and imposes superlevy. The department also implements the regulations on subsidies with respect to school milk and casein, imposes the levies and is involved in the determination of the urea content of milk, related to the implementation of the nitrate directive.

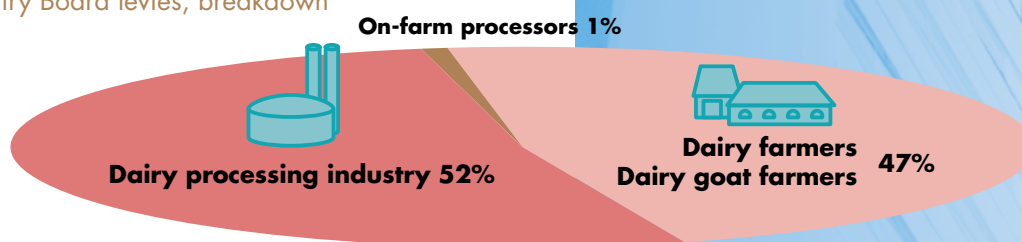


Finances Dutch Dairy Board

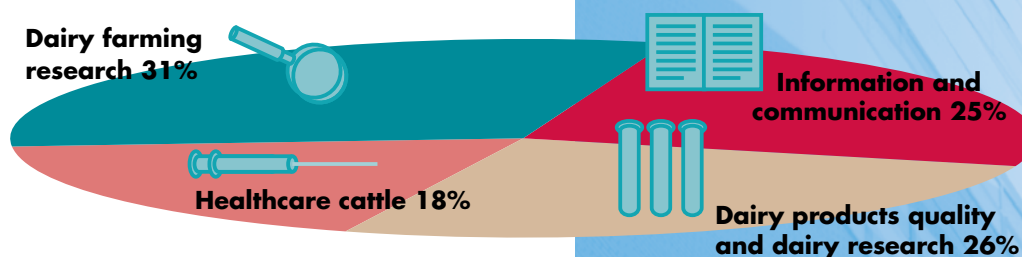
Autonomous activities

Activities under the independent control of the Board are financed by one general and various specific levies imposed on dairy farmers, on-farm processors, dairy goat farmers and the dairy industry. The levies (amounting to approximately € 18 million in 2007) are used to finance activities relating to information, research, animal health and quality projects. The Board's operating costs make up approximately 12% of the total expenditure on autonomous activities.

Dutch Dairy Board levies; breakdown

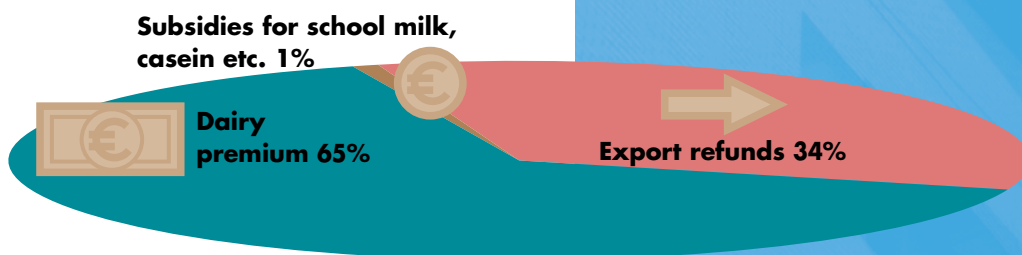


Dutch Dairy Board levies; allocation



Paying agency

Operating costs associated with implementation of European market regulations are reimbursed by the Ministry of Agriculture, Nature and Food Quality. In 2006 the turnover on payments related to EU-financed export and support measures was approximately € 570 million. The Board's annual operating costs amounted to € 7.2 million.



The superlevy related to the milk quota regulation was less than € 1 million in 2006.

Information

Internet Dutch Dairy Board

www.produivel.nl



The Dutch Dairy Board web site provides:

- Policy and accountability of the Board
- General dairy information (latest news, sector information, publications, links)
- Statistics (production, trade, consumption, prices/quotations of dairy products)
- Regulations (Board circulars, EU regulations)

Contact

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Sector Regulations/COS	+31-79-3681662	+31-79-3681950	srcos@pz.agro.nl

Organisations

CBL	Dutch bureau for Provision Trade	www.cbl.nl
CNV	National federation of Christian Trade Unions	www.cnv.nl
COKZ	Netherlands Controlling Authority for Milk and Milk Products	www.cokz.nl
EU	European Union	www.europa.eu.int
EZ	Ministry of Economic Affairs	www.minez.nl
FNV	Netherlands Trade Union Confederation	www.fnv.nl
GD	Animal Health Service Deventer	www.gddeventer.com
GemZu	Joint Dairy Federation	www.gemzu.nl
LNV	Ministry of Agriculture, Nature and Food Quality	www.minlnv.nl
LTO	Dutch Organisation for Agriculture and Horticulture	www.lto.nl
NZO	Dutch Dairy Association	www.nzo.nl
PZ	Dutch Dairy Board	www.produivel.nl
SER	Social and Economic Council	www.ser.nl
SZW	Ministry of Social Affairs and Employment	www.minszw.nl
VWS	Ministry of Health, Welfare and Sport	www.minvws.nl

