



# Agriculture in The Netherlands

*Nuffield CSC, Zeewolde*

Stefan van Merrienboer & Richard Scheper  
RaboResearch Food & Agribusiness  
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# What is your image of agriculture in The Netherlands?



## Dutch cow poo overload causes an environmental stink

Dairy farms in the Netherlands are producing so much dung they can't get rid of it safely. Now the WWF is calling for a 40% cut in herd numbers to protect the environment

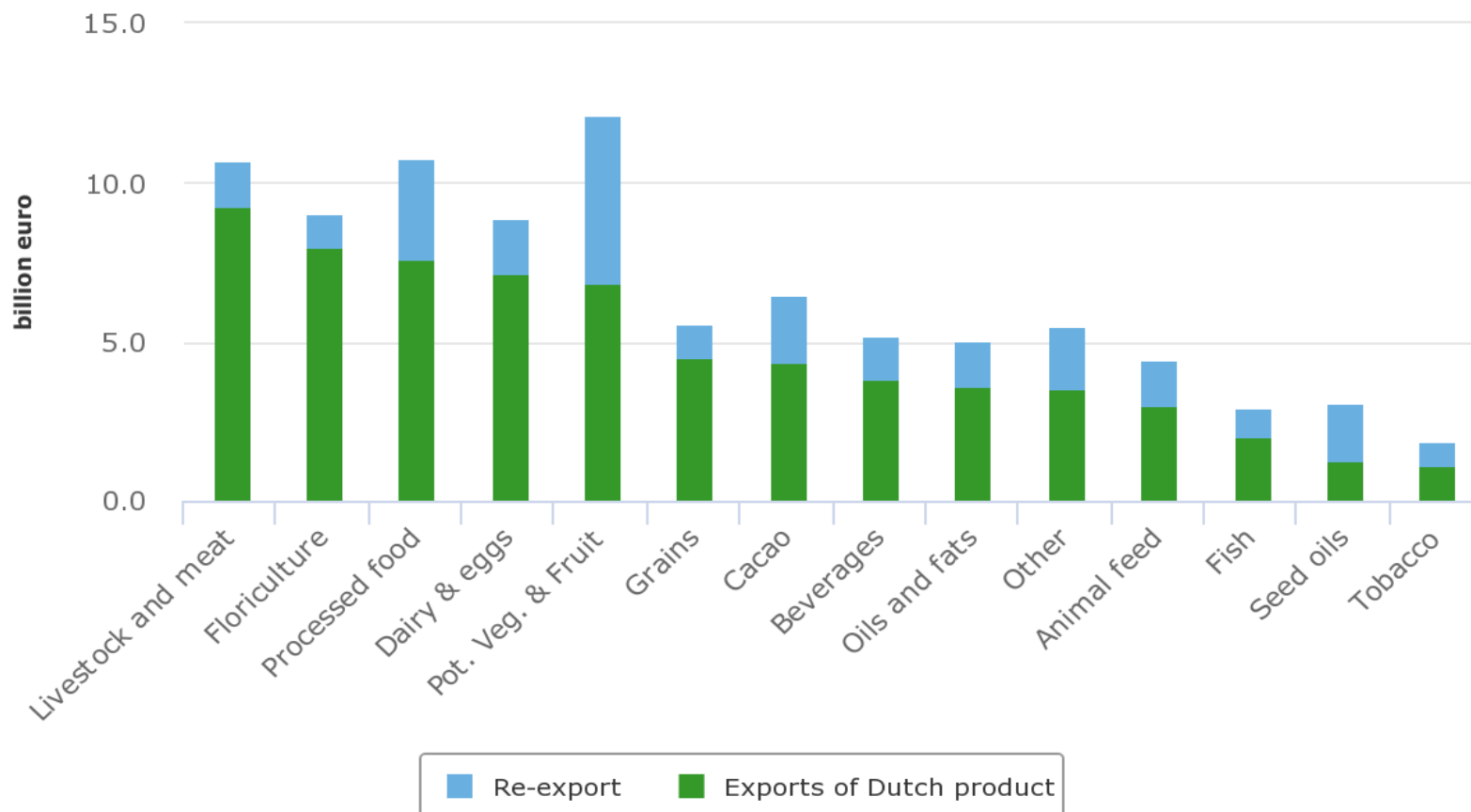


# Dutch agricultural export record in 2017



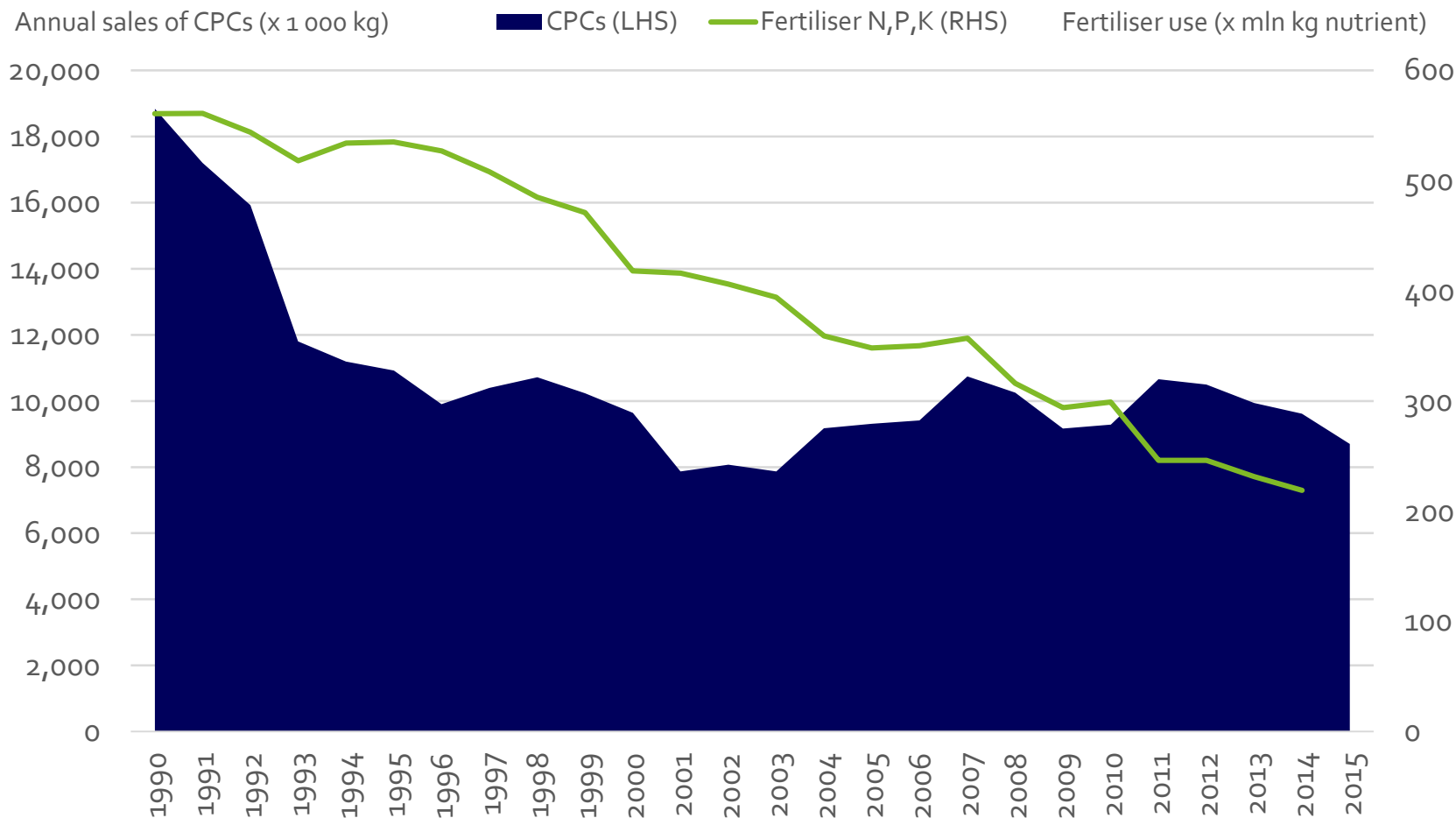
## Exports of agricultural goods

2017 (raming)



Source: CBS tot en met okt. 2017, raming nov. en dec. 2017 door WUR en CBS.

# Using less CPCs and fertilisers and...

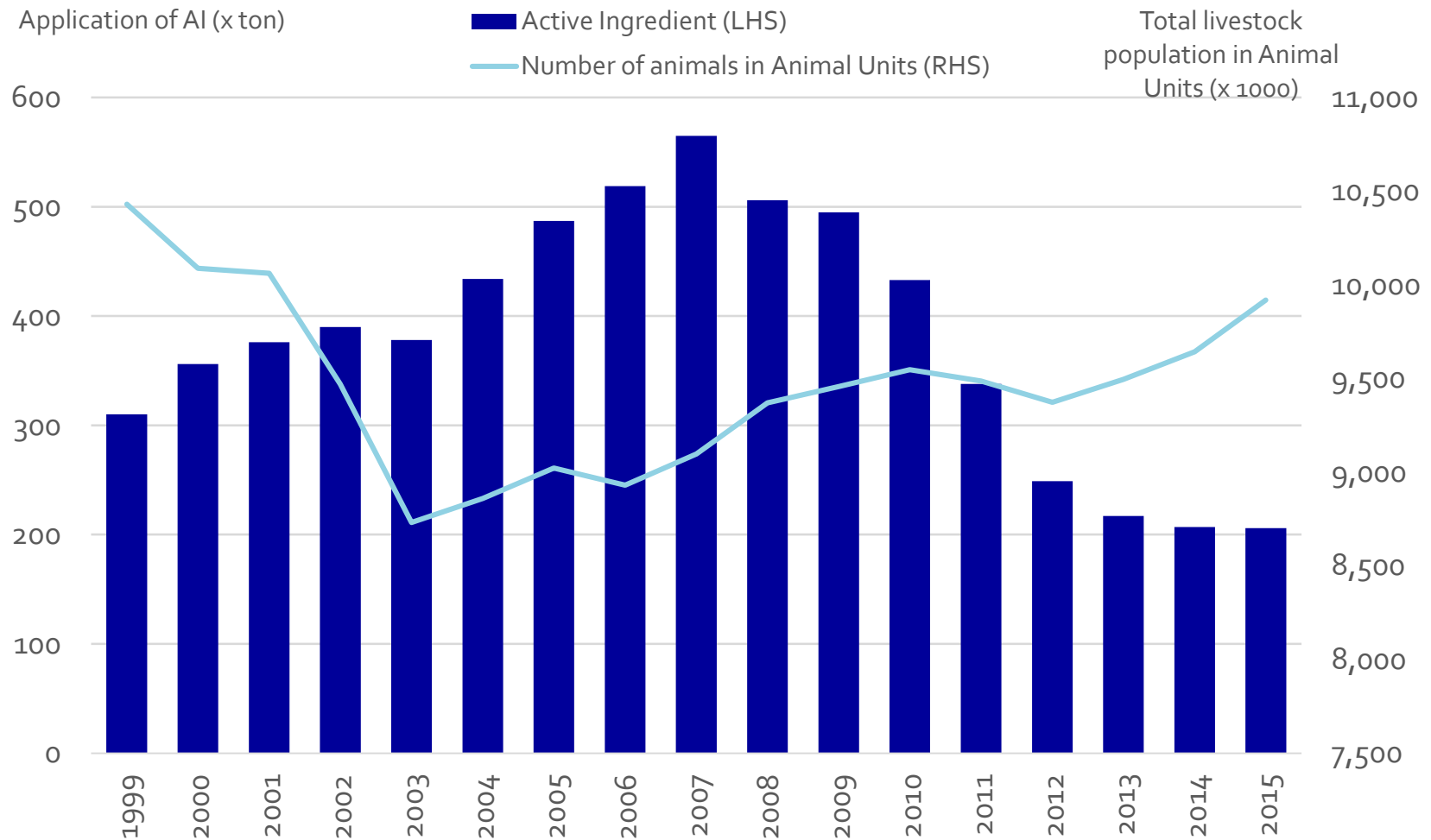


Source: WER, Nefyto, IFA, Rabobank 2018

# ..reducing the use of antibiotics.



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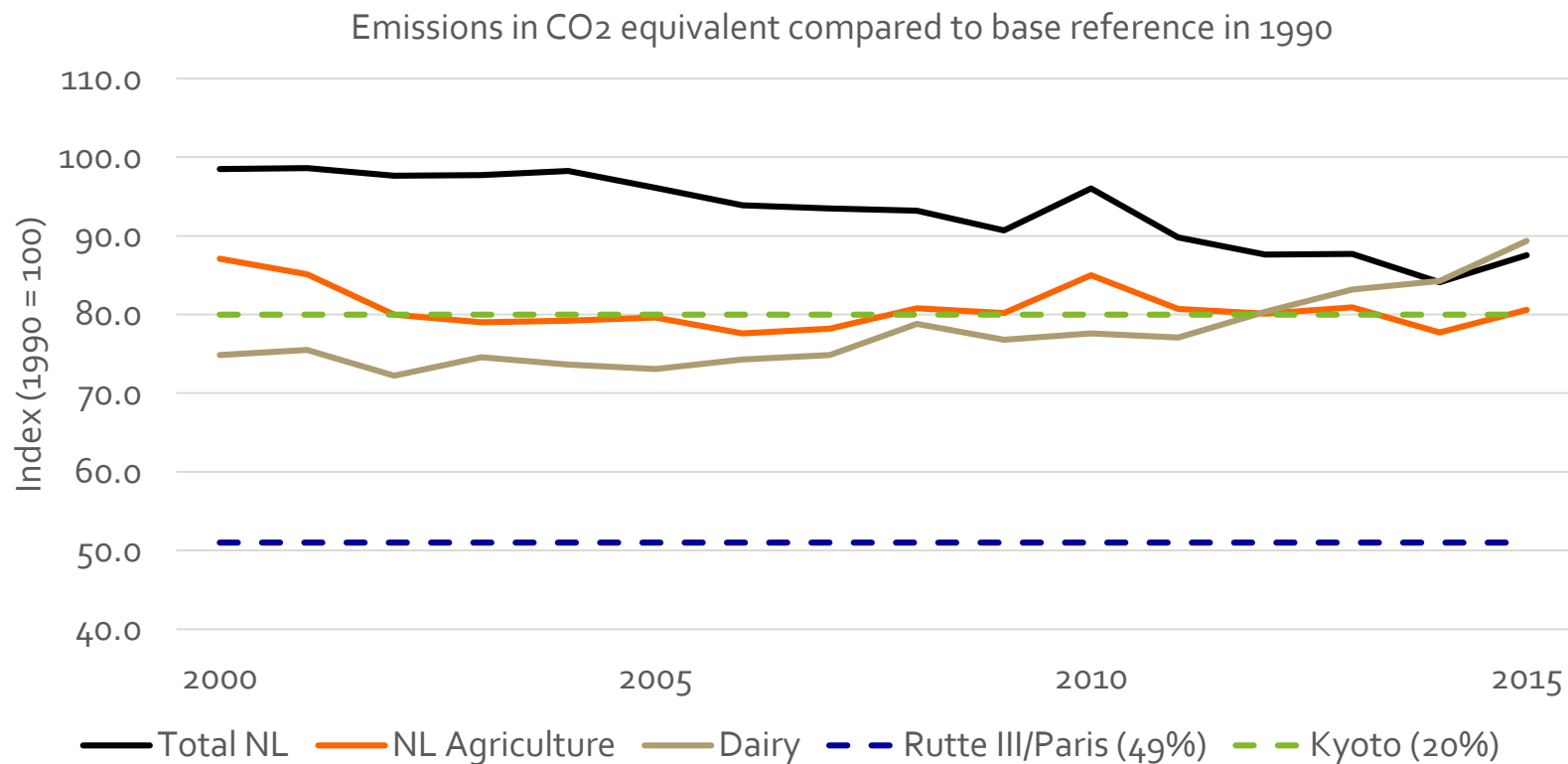


Source: FIDIN, CBS, European Commission, Rabobank 2018

# Carbon footprint



## *New climate targets will have an impact on future farming systems*



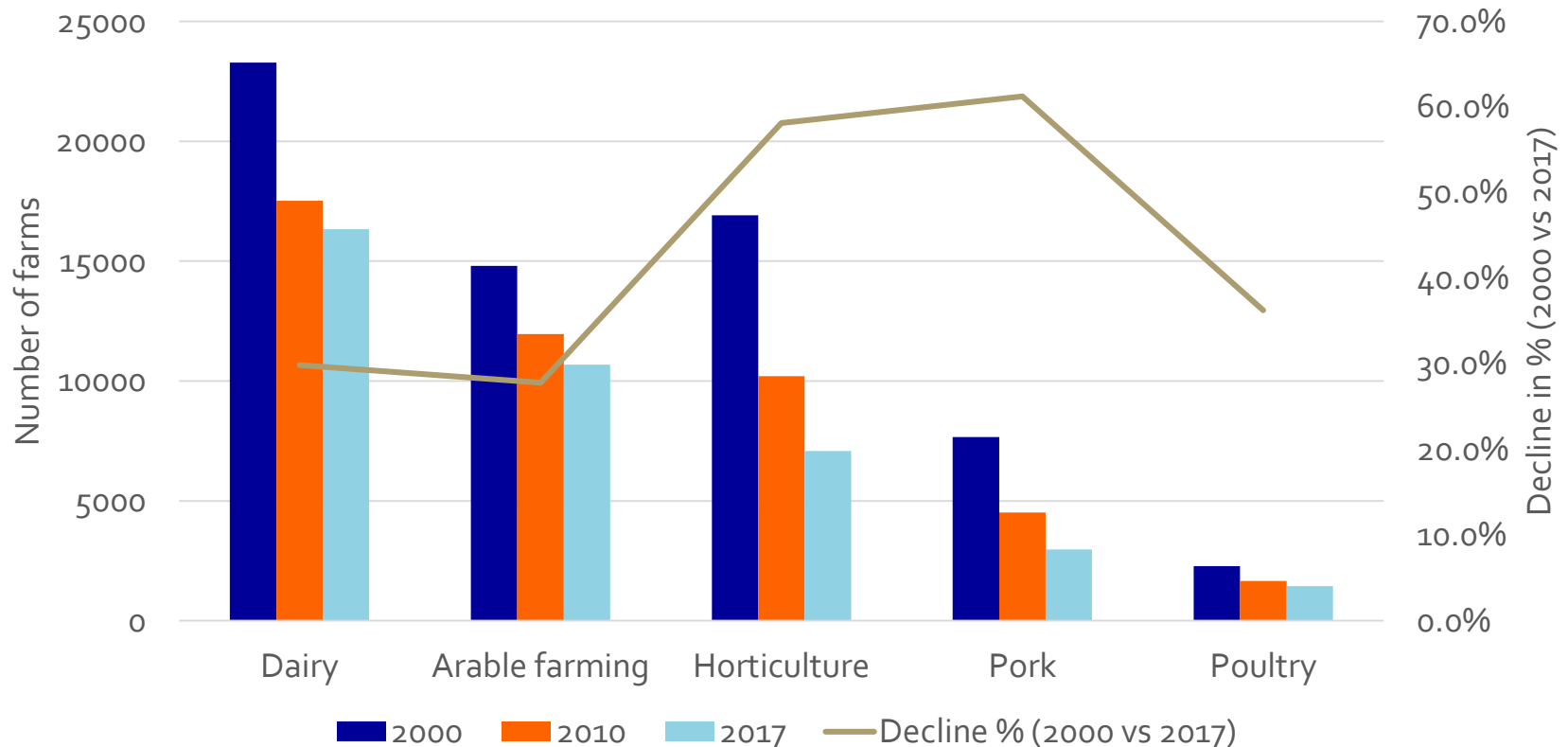
Source: LEI, Emissieregistratie, Rabobank 2018



# Succession is a challenge

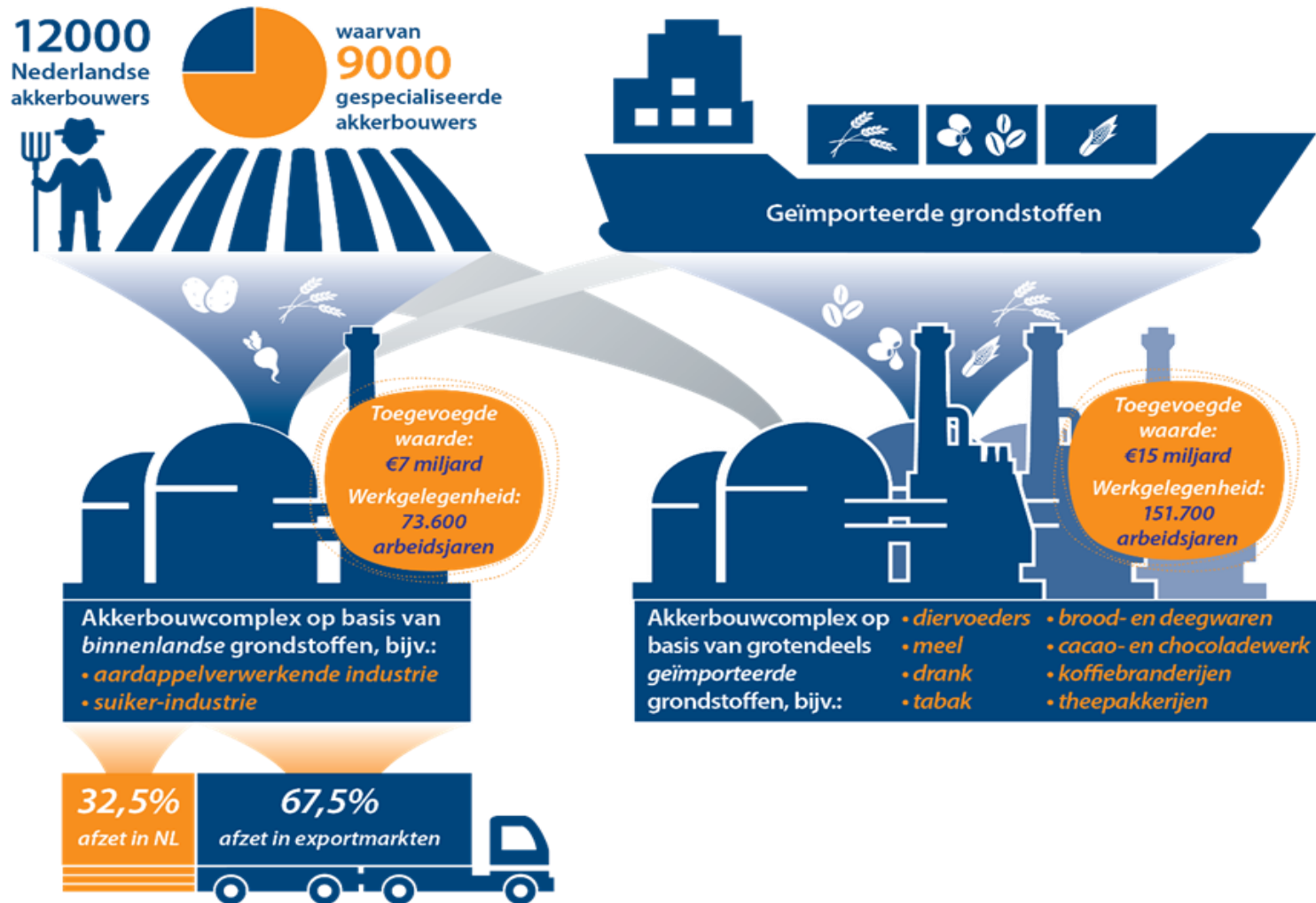


*Number of farms is declined with nearly 44% between 2000 and 2017: size and sector does matter!*



Source: CBS, Rabobank 2018

# Arable Farming in the Netherlands

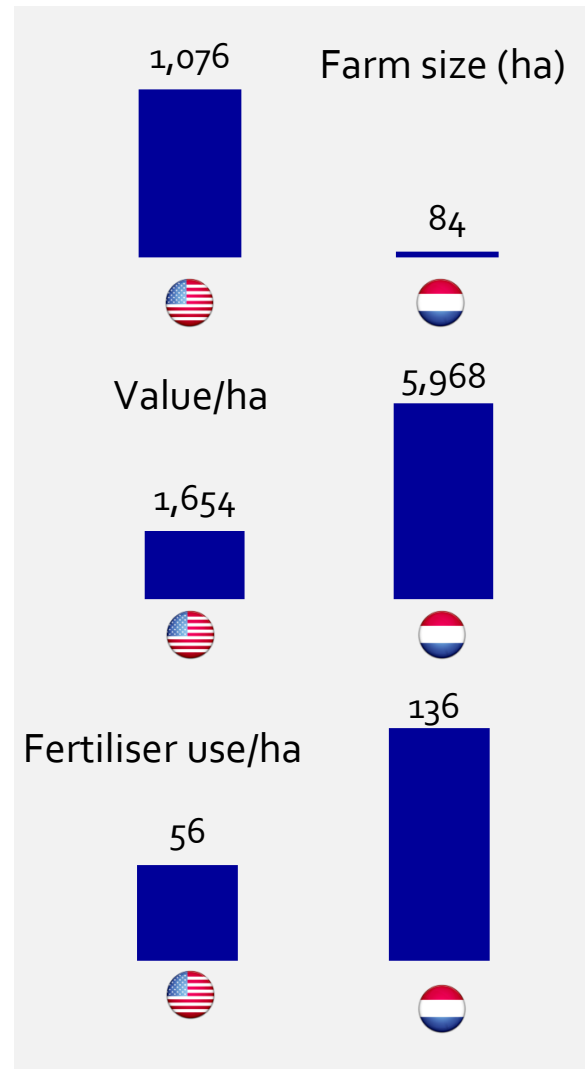
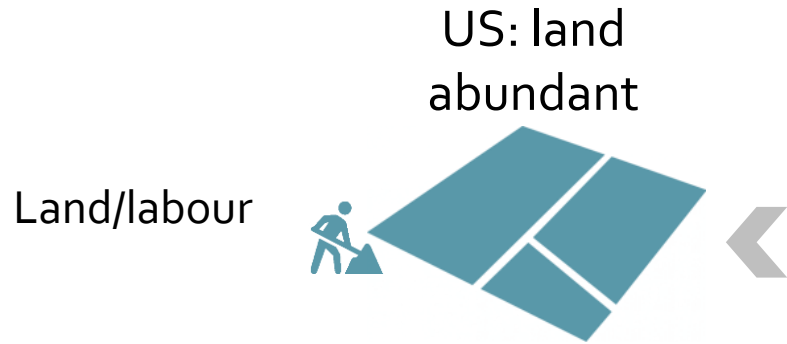


# Arable farming in a land scarce country

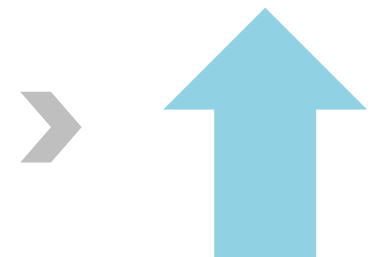


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Netherlands:  
land scarce

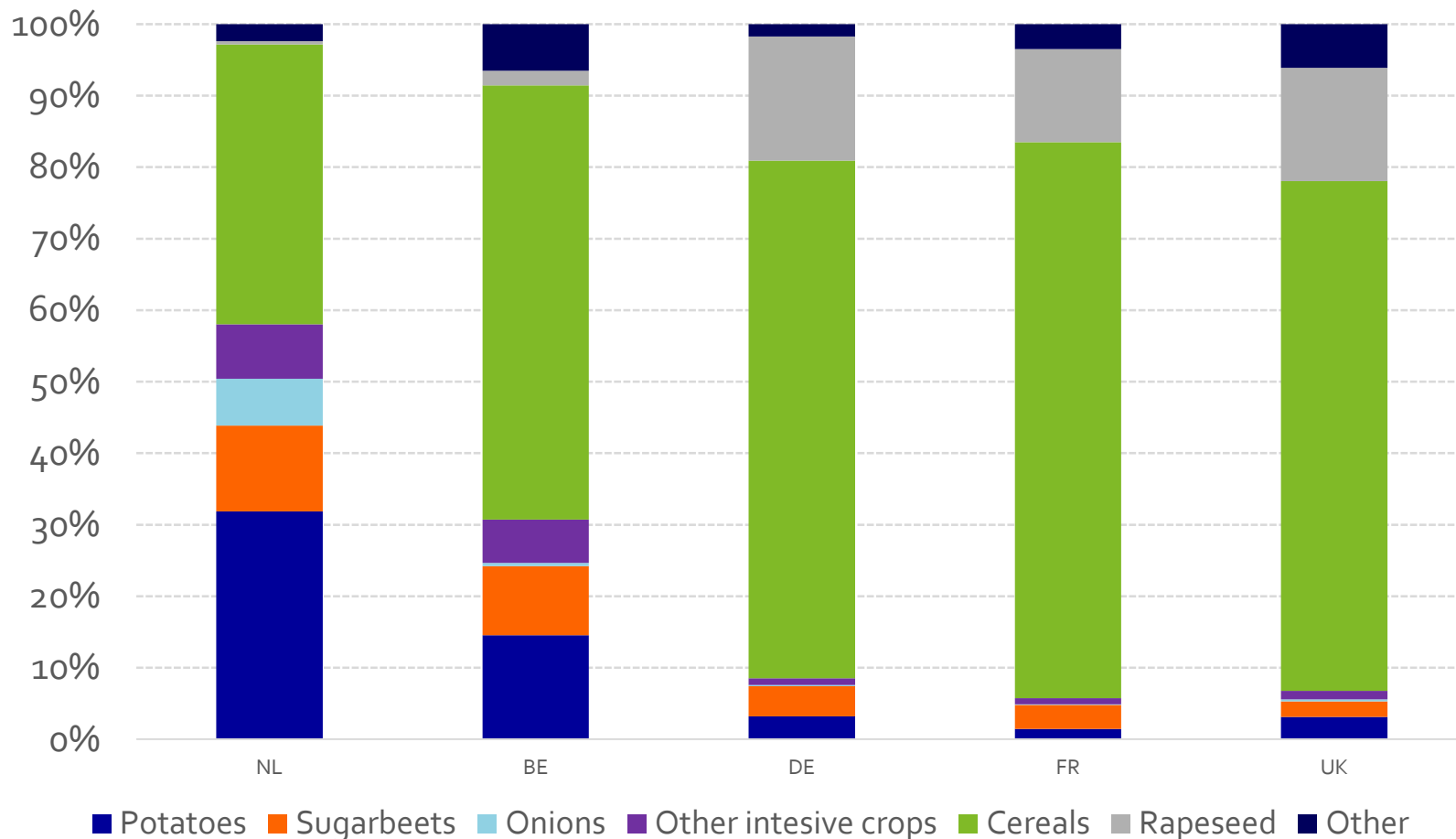


Potatoes  
Sugar beets  
Wheat





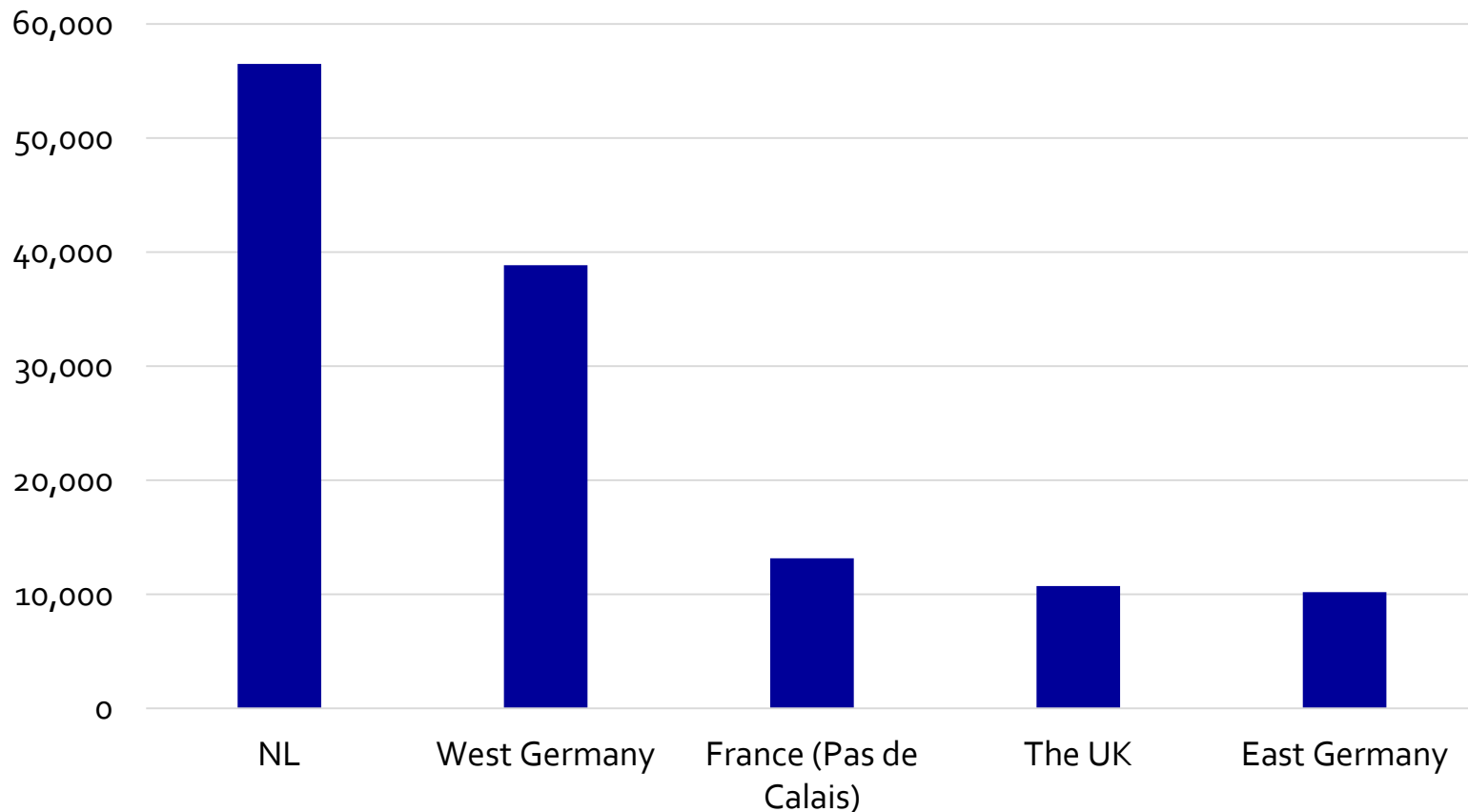
# Challenge 1: how can we maintain soil health?



# Challenge 2: making sure future generations have access to arable land



## Arable land in the Netherlands is expensive (€/ha)

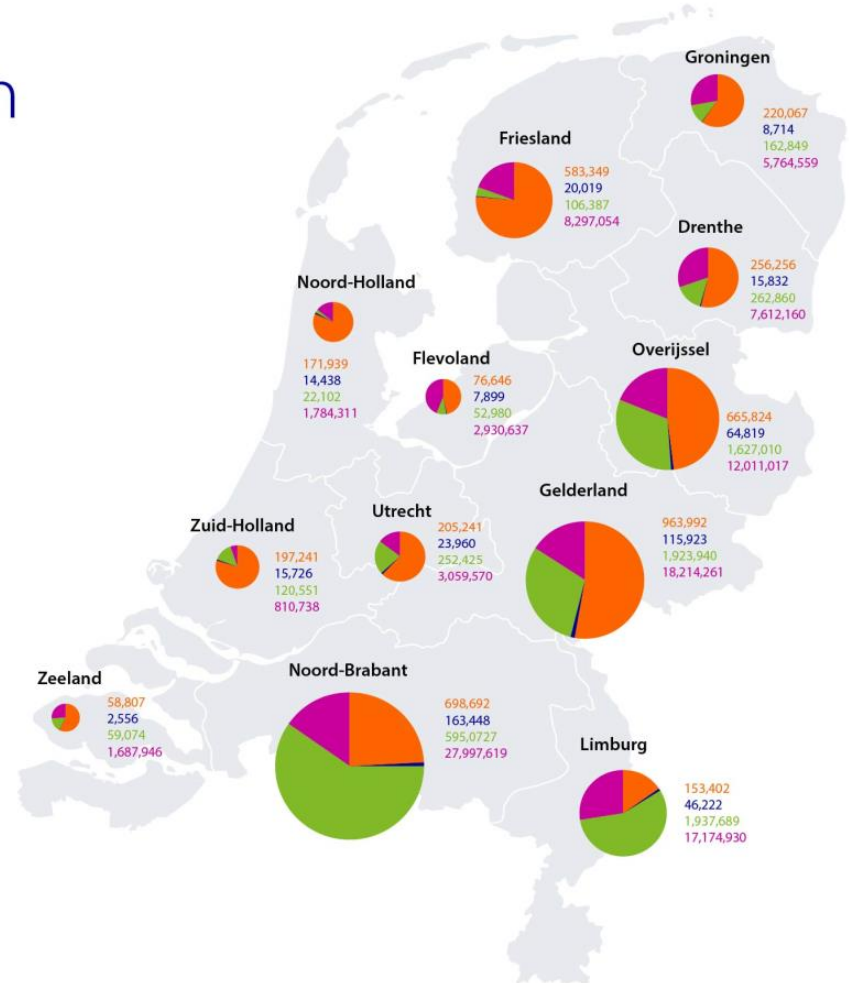
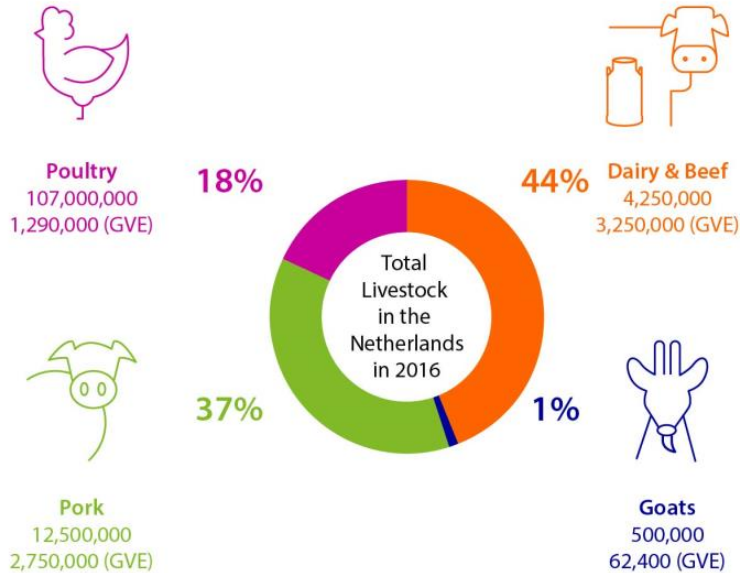


# Livestock in the Netherlands



*Livestock is concentrated in the South and the East*

## Distribution of Livestock in Animal Units (GVE's)



Source: CBS, Rabobank 2018

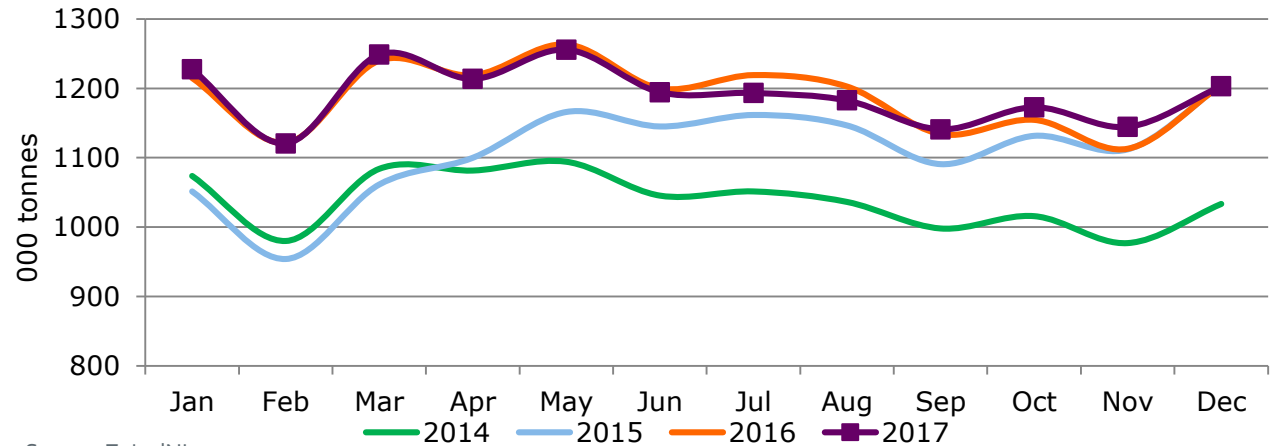


# The Netherlands: Land of Dairy



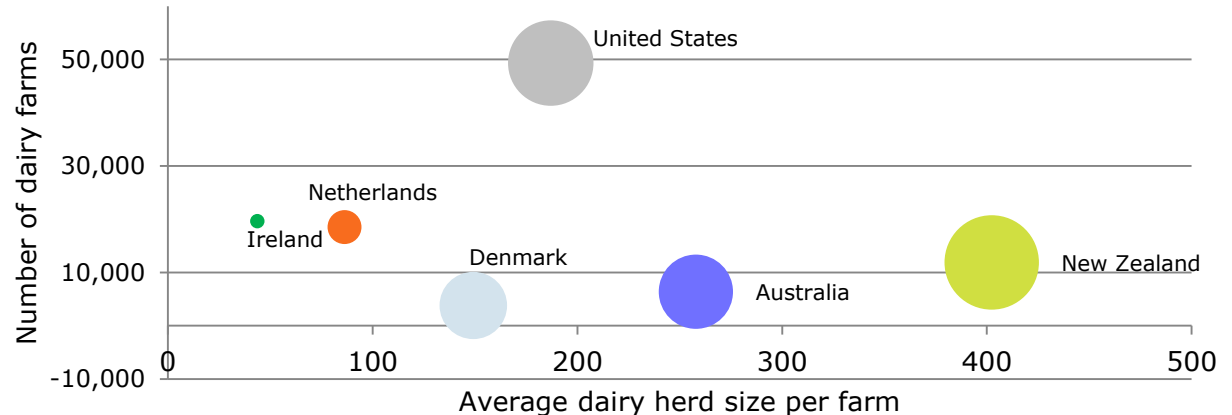
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Since 2014 milk production increased with 1.9 million tonnes to 14.3 million tonnes

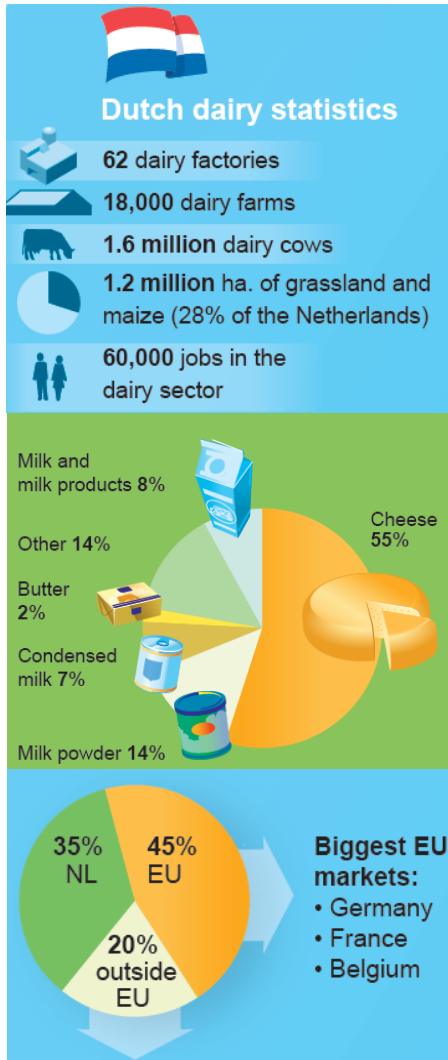


Source: ZuivelNL

Average farm size remains relatively small



Source: National Statistics, Rabobank



Source: ZuivelNL, NZO

# Dutch dairy as premium product



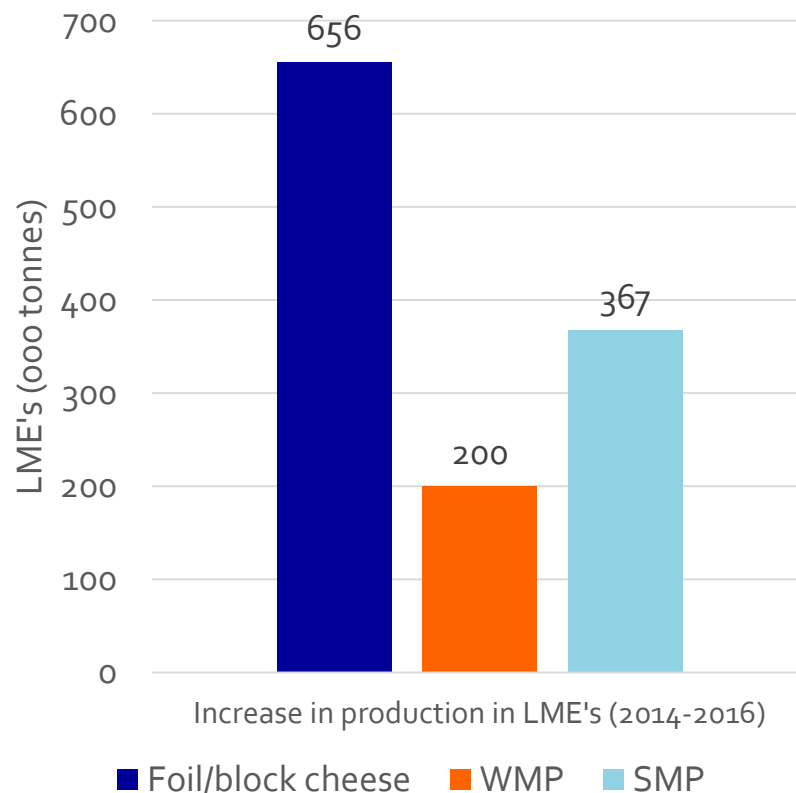
## Chinese shops selling Dutch dairy products



# The reality at the moment is slightly different

*33.695 tonnes of Dutch SMP in EU intervention stocks (Jan 2018). Which is the equivalent of 367.000.000 liquid milk equivalents.*

*Majority of the access milk is used for bulk products (2014-2016).*

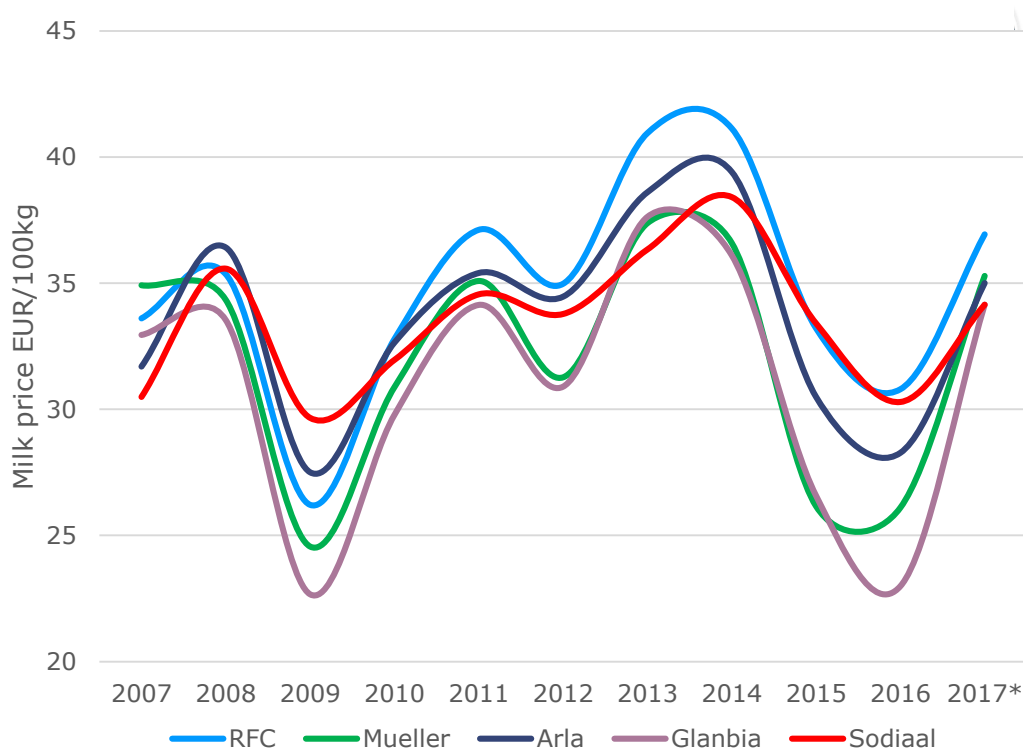




# Milk price volatility and cost prices



*Cost prices increased, while milk prices became more volatile*



## Break-Even-Point II in the last 4 years

in Ct/kg ECM, mean, long-term farms with 4-year participation in a row

|         | 2012/13<br>2013 | 2013/14<br>2014 | 2014/15<br>2015 | 2015/16<br>2016 |
|---------|-----------------|-----------------|-----------------|-----------------|
| SE (17) | 43              | 40              | 36              | 32              |
| DK (11) | 41              | 39              | 35              | 35              |
| BE (19) | 40              | 40              | 37              | 35              |
| FR (15) | 40              | 40              | 39              | 38              |
| NL (25) | 38              | 39              | 41              | 40              |
| ES (12) | 36              | 37              | 35              | 32              |
| UK (13) | 35              | 36              | 39              | 35              |
| DE (16) | 33              | 35              | 33              | 32              |
| IE (9)  | 29              | 30              | 26              | 26              |

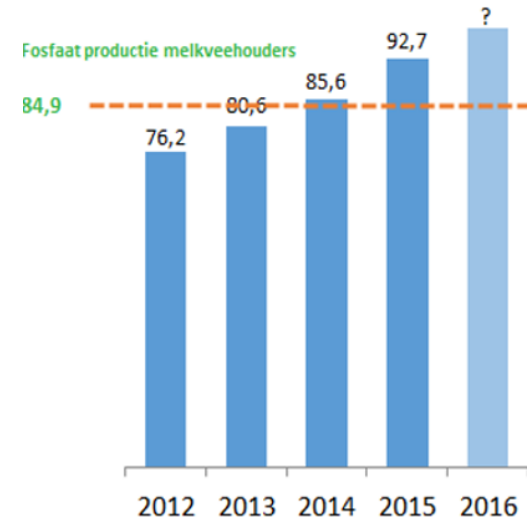
# Dutch Dairy and Minerals: phosphate



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## Phosphate reduction plan & phosphate production rights

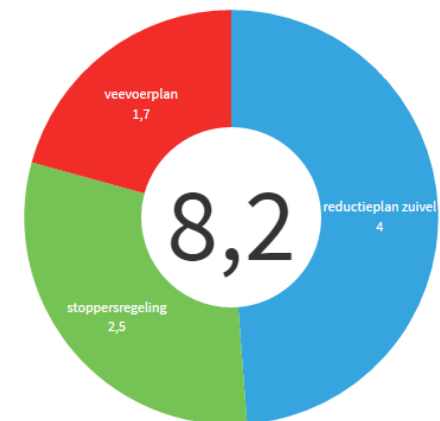
- Phosphate reduction plan = 2017
- Phosphate production > 1<sup>st</sup> of January 2018
- Reference date: 2<sup>nd</sup> of July 2015



Fosfaatreductieplan: 8,2 miljoen kilo minder fosfaat door melkvee  
voorgenomen fosfaatreductie volgens plannen zuivelsector, x 1 miljoen kilo fosfaat

## Phosphate reduction plan

- Reduce the amount of phosphate in cattle feed (1.7 million kilograms)
- Offer pre-financing solutions 'stoppersregeling' to farmers who want to quit in 2018 (2.5 million kilograms)
- GVE-reduction' or 'Fosfaatreductieplan ZuivelNL' (4,0 million kilograms).



Source: RVO, Boerderij.nl

# Conclusions



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Farming in the Netherlands is challenging

With (capital) intensive farming systems and strict regulation

However, challenges also accelerate innovations!





Thank you for your attention

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**Rabobank**



Richard Scheper  
Analyst Dairy  
E-mail: [Richard.Scheper@Rabobank.com](mailto:Richard.Scheper@Rabobank.com)

Stefan van Merrienboer  
Analyst Crop Farming  
Email: [Stefan.van.Merrienboer@Rabobank.com](mailto:Stefan.van.Merrienboer@Rabobank.com)

Website: [far.rabobank.com](http://far.rabobank.com)  
Twitter: [@rabofoodagri](https://twitter.com/rabofoodagri)

