Organic Farming in the Netherlands

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Contents

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1 General Information on Agriculture in the Netherlands

With a total surface area of about 4.15 million hectares the Netherlands ranks among the smaller countries in western Europe; it is slightly smaller than Denmark, but bigger than Belgium. As the population of the Netherlands is 15.5 million in the year 2000, it is one of the most densely populated countries in the world.

The limited land area puts an almost permanent pressure on the rural areas. The rural areas have to provide opportunities for economic production and transportation. At the same time valuable nature areas and unique landscapes should be safeguarded for future generations.

The agricultural area amounts to two million hectares and in 1999, there were 103,000 farms altogether. The share of the labour force working in agriculture is four percent. The enterprises of the farms concentrate on cattle (56 percent), horticulture (21 percent) and arable cropping (14 percent). Fruit-growing farms account for five percent of the farms and mixed farms for four percent.

2 History and Development of organic agriculture

In the Netherlands two types of organic agriculture can be distinguished: bio-dynamic and ecological farming. The history of organic agriculture starts in 1926 with the first bio-dynamic farm in Zeeland, Loverendale. In 1947 the *Warmonderhof* (http://www.warmonderhof.nl/warmhof/index2.htm) in Warmond establishes the first bio-dynamic agriculture school. In 1964 the first bio-dynamic advisor starts working. In the course of the sixties the ecological movement comes into being. In contrast to bio-dynamic agriculture with its philosophical background the origination of ecological agriculture has social and environmental motives. Protection of the environment, being careful with natural resources, energy and a changing society are the most important objectives of ecological agriculture. The organic sector is slowly growing: in 1972 the Netherlands numbers 85 organic farms, at the end of the eighties 359.

In the nineties, organic agriculture receives more and more recognition and the organic sector becomes more and more professional. A new organisation for the entire sector is founded in 1992: *Platform Biologica* (http://www. platformbiologica.nl/). Also in 1992 the conversion regulation comes into effect. Farmers who wish to convert are subsidised by the state. Food surpluses, manure problems, the swine-plague, various food scandals (BSE, dioxin etc.) and falling prices in conventional agriculture result in more and more regular farmers becoming interested in organic farming and in consumers demanding safe products. The organic sector slowly out-grows its "do-gooders" image. Research shows that organic farmers manage to acquire a comparable - if not better - income than their conventional colleagues. Most farmers converting now opt for ecological farming. After some years of ecological management a number of farms decide themselves for bio-dynamic agriculture.

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In the Netherlands there is a growing consensus regarding the necessity for a more sustainable form of agriculture. In a country as densely populated as the Netherlands an increase in organic agriculture is urgently needed to safeguard the environment for future generations and provide for healthy food-products. Platform Biologica, the umbrella organisation for the organic sector, advocates the realisation of ten percent organic agriculture by 2010.

In 1996 the Ministry of Agriculture (http://www.minlnv.nl/) developed an action plan for biological agriculture. It is currently revising the action plan and now supports the ten percent goal. Yet it is still hesitant to invest sufficiently into the conversion schemes.

3 Statistics on Growth of Organic Hectares and Farms

The organic share in the total agricultural surface in the Netherlands is relatively small. 1.17 percent of the total agricultural area is organically managed (table 1). In the nineties, however, the growth increased considerably. Between 1993 and 1997, an average of 60 farms per year converted. In 1998 and 1999 more than 200 farms converted per year which is the equivalent in growth of more than 25 percent per year.

Table 1: Organic Farming in Figures (1999)

Number of organic farms	1,216
Number of certified farms	936
Number of farms in transition	280
% of total number of farms	1.18 (total number of farms = 103,000)
Hectares under organic management	22,997
% of total agricultural area	1.15 (total = 2 million ha)

(Source: Skal/Blik)

4 Organic Agriculture Organisations and Logos

4.1 Federation of Organic Farmers

The organic farmers are organised in the *NVEL (Nederlandse Vereniging voor de Ekologische Landbouw)* the organisation for ecological farmers, which was founded in 1983,

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VB-DB (Vereniging van Biologisch-Dynamische Boeren) the organisation for the bio-dymanic farmers, which was founded in 1976.

Since 1995, both organisations have joined their strength in the Federation of Organic farmers *(Federatie van Biologische Boeren).*

The Federation safeguards the interests of the organic farmers in the Netherlands. Their main aims are:

- safeguard of realistic prices for organic products
- improvement of the national and EU-legislation on organic agriculture
- increase in the demand of organic products by improved consumer information
- safeguard of the natural character of organic agriculture.

4.2 Skal

Since 1985 Skal (http://www.skal.com/) controls compliance to the Council Regulation (EEC) 2092/901 (http://europa.eu.int/eur-lex/nl/lif/dat/1991/nl_391RZ2092.html). Their main aim is to guarantee a good and reliable certification of the organic products.

4.3 VBP - Vereniging Biologische Producenten

VBP (Verenigung van handels- en verwerkingsbedrijven in Biologische Produkten / Vereniging Biologische Producenten) is the organisation of processors of organic products. It was founded in 1995, uniting three smaller associations of processors. The main aim of the VBP is the defence of the common interests of their members and the stimulation of the trade and processing of organic products.

4.4 Platform Biologica

Until 1992 there were two organisations: *Biologica* being mainly active in the fields of consumer information and marketing and *Platform Biologische Landbouw & Voeding* being mainly active in the field of agricultural policy.

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Platform Biologica (http://www.platformbiologica.nl/) was founded in 1992. It is the umbrella organisation for organic farming and nutrition biological farmers, traders, manufacturers and retail-traders are co-operating to expand the reputation and the market of organic products.

The following organisations are associated with Platform Biologica:

- The Federation of organic farmers (that unites the NVEL and the VBDB, the two organic producer associations)
- the VBP, the organisation of processors of organic products,
- the VWNR, the association of retail traders in natural food,
- the CBL, the umbrella organisation of supermarkets.

4.5 Good Food Foundation

The Good Food Foundation (http://www.goodfood.nl/)was established in 1986 with the aim to encourage, initiate, subsidise, manage and supervise projects in the field of organic agriculture. Members of the foundation are mainly European firms. Certified organic products originating from the projects are: Sultana raisins and paste, dried figs and figpaste, dried unsulphured apricots and other fruits as well as herbs, pulses, grain and seeds.

4.6 Avalon Foundation

Avalon is an international, non-profit foundation based in the Netherlands. Since its establishment in July 1991, Avalon has been committed to the support of sustainable rural development in the transitional economies of Central and Eastern Europe. Much of their work focuses upon harnessing the two instruments of market development and agri-environmental policy in order to create a favourable economic climate for organic agriculture to become established and to prosper to the benefit of local communities throughout Central and Eastern Europe.

5 Regional Distribution of Organic Farms

The Netherlands has twelve provinces. The provinces of Gelderland and Noord-Brabant have the highest number of organic farms (table 2). They are also the largest provinces of the Netherlands. In Flevoland, however, the area under organic management is highest.

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Table 2: Organic farming in the different provinces in the Netherlands in 1999 (map see: http://sunsite.informatik.rwth-aachen.de/Maps/europe/Netherlands.jpg)

Province	Number of farms	Hectares	% of the total agricultural area
Groningen	76	1,227	0.5
Friesland	130	3,475	1.3
Drenthe	78	2,430	1.2
Overijssel	128	1,618	0.6
Flevoland	125	5,363	5.3
Gelderland	178	2,336	0.8
Utrecht	62	819	0.8
Noord-Holland	123	2,397	1.5
Zuid-Holland	87	1,540	0.8
Zeeland	37	602	0.3
Noord-Brabant	145	1,623	0.5
Limburg	44	567	0.3
The Netherlands	1,216	23,997	1.15

(Source: Skal / CBS / Blik 2000)

6 Land Use, Animal Husbandry

Many of the organic farms in the Netherlands are mixed farms. Table 3 shows the main activity of the farms.

The largest sector in the Netherlands is the animal husbandry sector. Within the last years especially the number of dairy farmers has sharply risen, due to increasing consumer demand and the introduction of dairy products in the supermarkets. Because of the improved conversion regulation organic farming has become more and more interesting for fruit farmers as well. The area with fruit production has doubled in one year's time. Only in horticulture the number of converting farms is growing at a slow pace.

Table 3: Share of organic farms per sector 1999

Sector	Percentage at the total number of organic farms
Horticulture	24.5
Fruit growing	6.0
Arable crops	24.0
Animal husbandry	42.0
Others (includes: mushrooms, planting material and herbs)	3.5

(Source: Skal /Blik)

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Greenhouse production has still only a minor meaning for organic farms. 40 organic farms have greenhouses. But for them, it is not their only source of income. Only 20 farms are mainly greenhouse farms, the rest are horticultural farms with small greenhouses.

7 Standards, Certification, State Regulations and Implementation of the Council Regulation (EEC) No. 2092/91

Like in all European countries in the Netherlands Council Regulation (EEC) No. 2092/91 (http://europa.eu.int/eur-lex/nl/lif/dat/1991/nl_391R2092.html) is in force for organic plant production and processing and from 24th of August 2000 also for animal production (Council Regulation (EC) No. 1804/99; http://europa.eu.int/eur-lex/nl/lif/dat/1999/nl_399R1804.html). The Dutch government has appointed Skal (http://www.skal.com/) as the only inspection body in the Netherlands to check compliance with the EU-Regulation. Presently, the Belgian Blik controls 15 farms with animal husbandry. When the law on animal production comes into force on the 24th of August 2000 only Skal will be certifying organic agriculture in the Netherlands.

Certified organic products can be identified by the EKO trademark.

For bio-dynamic products there is also the Demeter-trademark.

8 State Support and Policy Initiatives

The Ministry of Agriculture (http://www.minlnv.nl) is an advocate of expansion of the area under organic management. The Minister of Agriculture announced an evaluation of the earlier Plan of Action for Organic Farming. That means that the Lower House will see a new Plan of Action at the beginning of the year 2000. It will be finished ca. in July 2000. Its name is „Plan von Aanpak biologische Landbouw 2001-2004“. Aims are five percent of the organically managed area in 2005 and ten percent in 2010.

Dienst ***La****ndelijke* ***Ser****vice (LASER)*, the Dienst National Service executes the subsidy regulations of the Ministry of Agriculture (http://www.minlnv.nl/), Nature Management and Fishing Industry. The following regulations concern organic farming:

- Regulation supporting the conversion to organic production (Regeling stimulering biologische productiemethode, RSBP, http://www.minlnv.nl/international/deutsch/presse/02.htm)

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- Innovation market and Competition force (Innovatie Markt en Concurrentiekracht, INN)
- Stimulation regulation Innovation National Area (Stimuleringsregeling Vernieuwing Landelijk Gebied, VLG)
- Investment regulation market and Competition power, - Division processing and sales of farming products (Investeringsregeling Markt en Concurrentiekracht, onderdeel verwerking en afzet van landbouwproducten, VAL)
- Subsidy regulation Demonstration projects market and Competition power (Subsidieregeling Demonstratieprojecten Markt en Concurrentiekracht, DEMO)

Within this stimulation framework a little over 11.5 million Guilders (5.2 million Euro) were paid out in 1997 as well as in 1998 to projects in organic farming (incl. the conversion regulation).

8.1 RSBP - Conversion Scheme

Farmers who want to convert to the organic production method have to wait for two years before they may call their products organic. During this period they do have to start working according to the organic method. That means lower yields without higher prices. In order to compensate this loss in income the regulation supporting the conversion to organic production (RSBP) (http://www.minlnv.nl/international /deutsch/presse/02.htm) has been created. This regulation provides a financial support during the transition period.

The conversion subsidies were substantially improved in 1999 for outdoor horticulture, for greenhouse production and fruit farming. There is however the condition that one will go on growing according to the organic method for at least five years. Per five years per hectares arable crops the subsidy amounts to Guilders (Dfl) 2,500.- / 1,136 Euro (remained the same), for vegetables (outdoor and greenhouse production) the subsidy is Dfl 12,500.- / 5,682 Euro (until 1999 it amounted to Dfl 6,000.- / 2,727 Euro respectively Dfl 9,250.- / 4.205 Euro) and for fruit growing it is to Dfl 25,000.- / 11,364 Euro (was Dfl 9,250.- / 4,205 Euro).

The budget for 1999 amounted to 15 million Guilders (Dfl) / 6.82 million Euro. (In 1998 conversion subsidies were granted for almost 3.5 million Dfl / 1.6 million Euro, in 1997 for 4.1 million Dfl / 1.86 million Euro.) The interest in 1999 was so high that the regulation was over-signed within one day. Within the application period 175 applications were submitted. No more than 55 applications could be granted (table 4).

For the year 2000 an adapted regulation was announced. In order to prevent unintended use the subsidy amounts for fruit farming and open field vegetable farming will be based on the real loss of yields. For the year 2000 20 million Dfl (9.1 million Euro) were budgeted.

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Table 4: Number of granted applications for conversion

Year	1994	1995	1996	1997	1998	1999
Number of granted applications	95	40	14	110	83	55

(Source: LASER Noord, 1999)

8.2 Green Financing

Since 1st of January 1995, the Ministry of Housing, Spatial Planning and Environment (VROM, http://www.minvrom.nl) has made possible green investments. Interests and dividends for private investors will no longer be taxed. Organic farming, marketing and processing is one of the "green" fields on which investments can be made.

For organic farmers and other organic industries it is possible to borrow at a lower interest rate (one to even 1.5 percent lower) on the condition that a project has been recognised as a green project.

In spite of an initially slow start in 1995 and 1996 (only three respectively 44 projects), full use of this regulation was made subsequently in 1997 and 1998. In total 403 organic green projects, with a project capital of more than 350 million guilders, were able to make use of this lower interest rate (table 5).

Table 5: Number of green projects in the organic sector

Year	1995	1996	1997	1998
Application	3	44	232	124
Project capital in million Guilders / million Euro	1.84 / 0.84	47.3 / 21.5	204.8 / 93.1	99.1 / 45.0

Source: LASER Zuidwest, 1999

8.3 Fiscal Stimulation Regulation

In the year 2000 organic farms will be eligible for a tax free allowance for sustainable producers. For this 20 million Guilders (9.1 million Euro) have been made available for the year 2000. Biological farmers and producers of organic products, who obtain at least 70 percent of their income from the selling of organic products can deduct the sum of 15,000 Guilders (6,818 Euro) from their income taxes.

8.4 Provinces

Most provinces in the Netherlands have made their own Action Plans for Organic Farming and are striving for an increase in the number of organic farms. A survey of the subsidy- and financing regulations of the provinces and the contacts concerned can be applied for with the Platform Biologica (http://www.platformbiologica.nl) in writing, by telephone or by e-mail.

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9 Implementation of Agenda 2000

In July 1997, the European Union presented Agenda 2000 in order to convert the Common Agricultural Policy. In March 1999, the European Union presented detailed regulations. On 15th of December 1999, the Dutch Ministry of Agriculture (http://www.minlnv.nl) presented a new rural development plan to the European Union. In the plan the Dutch government requests for 124 million Guilders (56.4 million Euro) support from the European Union. 38 million Guilders (17.2 million Euro) are destined to sustainable agriculture of which organic farming is a part.

It is the European Union that finally approves the plan, in consultation with the Member State. For the period 2000 to 2006 a yearly maximum of 4.3 billion Euro is available for the member states altogether. The quality of the plan will determine how much money the European Union will make available. Normally the European Union refunds a percentage of the expenditures. What percentage of the measures the European Union will pay for is still not clear. It is expected that this will be approximately an average of 25 percent for the Netherlands.

The ministry publishes a newsletter regarding the plan: "Newsletter Project Rural Development plans". Interested parties can request this newsletter (Tel: + 31 (0)70-3785314).

10 Marketing

The market size for organic products in the Netherlands in 1999 has exceeded half a billion. According to an estimate by the research bureau Aurelia Dutch shops, farmers and exporters will have a turnover of DFL 515 million (234.1 million Euro) in 1999. In 1998 it was still DFL 440 million (200 million Euro), and in 1997 sales were at a level of DFL 375 million (170.5 million Euro).

10.1 Organic Food Shops

Organic products in the Netherlands are sold for a large part via the organic food shops. Organic food shops control approximately half the market (DFL 257 million / 116.8 million Euro). In the last four years the increasing interest of the consumer has led to a yearly growth in turnover of the organic food shops of five to eight percent.

10.2 Supermarkets

The interest of supermarkets in organic products has sharply increased over the last years. Since Albert Heijn (AH) – the largest supermarket chain in the Netherlands – introduced its own organic house brand at the beginning of 1998, sales in the supermarkets have risen sharply. The market share of the supermarkets has grown in two years time from 19 to 27 percent (DFL 150 million / 68.2 million Euro).

The other sales take place directly from the farm, from farmers' markets or via vegetable subscriptions.

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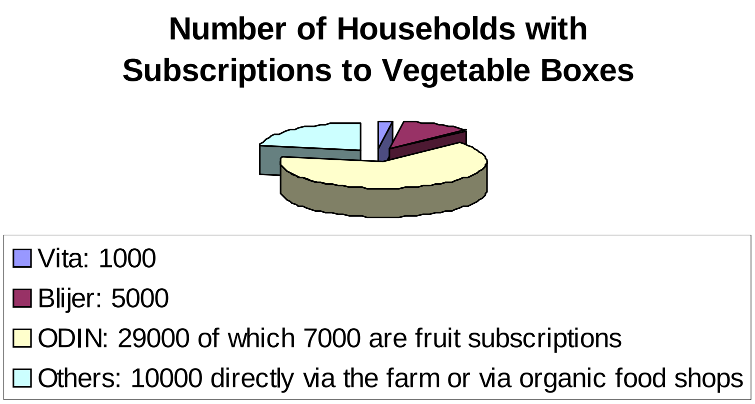
10.3 The "Vegetable Bag"

A subscriber to a vegetable box scheme receives a bag with freshly harvested vegetables and fruit every week. The bag contains mainly regionally grown seasonal vegetables and fruit. A vegetable box scheme can be arranged directly via organic farms or with organic food shops. These "vegetables bags" are very popular. While ten years ago it was an unknown phenomenon in the Netherlands, in 1999 45,000 households got their vegetables at a shop or a farm every week (picture 1).

Figure 1: Subscribers to Vegetable Boxes



Odin (http://www.odin.nl/) is the name of a bag and also of the retailer. Vita and Blijer are names of bags that are retailed by *Udea* (http://www.ekoland.com/).

10.4 Farmers' Markets

The number of farmers' markets - markets where only organic products are being sold – has increased sharply during the last five years. In four years' time their number has almost doubled: from 15 to 27 farmers' markets in 1999 (table 6). That is also due to Organic Farmers' markets that endeavour to realise farmers' markets in as many towns as possible in the Netherlands based on accurate market research.

Table 6: Growth of Organic Farmers' Markets

Year	Number of markets
1995	15
1996	13
1997	18
1998	22
1999	27

Source: Platform Biologica

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10.5 Processors

The growing demand has also resulted in a remarkable growth in the number of organic processors (table 7). Since 1996, 300 new processors have acquired a place in the organic market. Skal (http://www.skal.com) considers processors to be the industrial and artisan , the importers, the service providing industries and the charge industries. Among the industries that entered in 1999 there are among others 15 butcheries, twelve bread- and pastry bakeries, 21 vegetable and fruit processors and seven dairy processors.

Table 7: Number of organic of processors

Year	1993	1997	1998	1999
Processors	432	514	575	733

(Source: Skal 2000)

11 Training and Education

The only school for bio-dynamic farming in the Netherlands is the *Warmonderhof* (http://www.warmonderhof.nl/warmhof/index2.htm) in Dronten. The Warmonderhof is a part of Groenhorst College. Students between 15 and 27 years of age can take a four-year course to become a bio-dynamic farm manager. An ecological diploma is being developed at the moment. The Warmonderhof (http://www.warmonderhof.nl/warmhof/index2.htm) also provides a course via the apprenticeship system. This exists not only in the Netherlands but also in Belgium and the South of Germany. These countries themselves do not provide any possibility to acquire a diploma for bio-dynamic farm manager.

In the secondary and higher agricultural education in the Netherlands more and more attention is being paid to organic farming. This also thanks to the *BIOLA (biologische landbouw)*-project, a sizeable project in which schools and teachers are being informed of the possibilities to include organic farming in the agricultural education. Over 100 teachers take part in the project that will end in the middle of 2000.

At academic level students can take subjects concerning organic farming at the Leerstoelgroep (Chair group) organic farming systems of the *Wageningen University* (http://www.agro.wau.nl/eco/index.htm) *and Research Centre (*WUR*)* (http://www.wur.nl) in Wageningen. It is also possible to attend a Masters course in organic farming or to do a doctors degree in these subjects.

Finally the *Study Centre Kraaybeekerhof* (http://www.kraaybeekerhof.nl/) in Driebergen provides retraining courses for organic farmers. And the *Centre for Organic Farming* in Lelystad provides an orientation course in organic farming for conventional farmers in co-operation with the Warmonderhof Education.

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12 Advisory Service

In the Netherlands a farmer who wants to convert to organic farming may receive technical advice and training from several private consultancy firms. *DLV* used to be a government institute (Dienst Landbouwvoorlichting) but has been privatised in the meantime. It is the largest consultancy firm and it employs special advisers for all sectors in organic farming. Since the privatisation, its name DLV is the full name. On top of that a number of other smaller private consultancy firms specialised in organic farming are available: *AgroEco*, *Nieuwland Advies* and *Skal Quality Services*. These advice bureaus also provide training courses for conventional farmers wishing to convert or training courses for organic farmers.

13 Research Situation

In order to solve bottlenecks in organic farming a powerful research policy is needed. In 1999, 176 research projects existed specifically for organic farming, with a total financial amount of approximately twelve million Guilders (5.5 million Euro). The exact share of the Ministry of Agriculture still has to be drawn up, it is estimated at approximately eight million Guilders (3.6 million Euro). This is approximately 0.5 percent of the total budget of the Ministry of Agriculture for research, education and knowledge transfer together (approximately 1,700 million Guilders / 773 million Euro). Of course within that total budget research takes place in conventional farming that can also contribute to organic farming.

By far most of the money (approximately 5.5 million Guilders / 2.5 million Euro) concerns projects in vegetable growing and vegetables growth-sector. Dairy farming is next with approximately two million Guilders (0.9 million Euro), and fruit with approximately one million Guilders (0.45 million Euro). The other sectors have budgets of less than 1 million Guilders, but practically all research stations now develop research for their organic sector.

Most research is aimed at the development of farming systems in general such as housing, crop rotation, fertilisation and farm economics. On top of that much attention is paid to diseases and plagues at the growing level.

In order to better structure and co-ordinate research in organic farming, Platform Biologica has executed in co-operation with the Wageningen University and Research centre (WUR – the only agricultural university and research centre in the Netherlands (http://www.wur.nl) the project "Research agenda organic farming and food 2000 to 2004". The aim of the project is to determine a research agenda for the entire organic sector. The research agenda has been presented to the Ministry of Agriculture on the 1st of february 2000 and will be used for the new Plan of Approach for organic farming of the Ministry of Agriculture.

Louis Bolk Instituut
onderzoek biologische landbouw

One of the institutes in the Netherlands doing research on biological agriculture is the *Louis Bolk Institute* (http://www.louisbolk.nl/) in Driebergen.

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Since 1976, the Louis Bolk Institute has been a pioneer in scientific research and innovation in organic farming, food and medicine.

14 Challenges and Outlook

Within the last ten years much has happened in the organic sector. The dairy farm sector has developed rapidly. Sectors such as poultry, greenhouse farming, fruit and pigs are still in the pioneering stage in the Netherlands, but they have a large growth potential. Yet the Netherlands is still lagging behind compared to its European neighbours. Many obstacles that hinder growth must be put out of the way. For instance there is hardly any research money available and the budget for the conversion regulation and other measures promoting organic farming is too limited.

However, when the organic production and sales channels continue to develop at the same rate, and environmental pressure by conventional food production will be increasingly charged by means of fiscal instruments leading to higher food prices, then organic farming will continue to grow.

However, determining and checking clear norms that guarantee the sustainability of organic products in this growing market is an absolute condition. Therefore strengthening the image of organic production must be worked at from one integral vision.

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