

# **KEY INDICATORS**

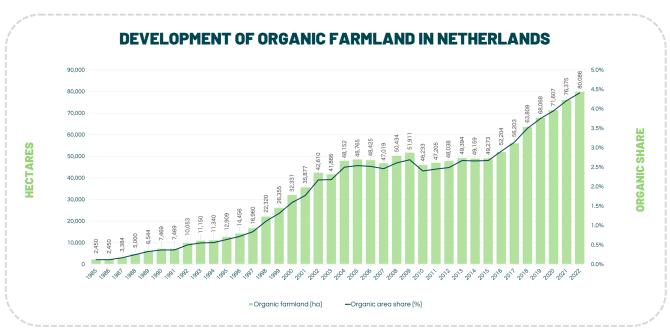
With 80,086 hectares, the Netherlands had 4.4% of its farmland under organic management in 2022, considerably less than the EU (10.6%). Growth from 2001-2022 was modest compared to most other countries; the organic farmland area only doubled. In the Netherlands, organic retail sales amounted to 1,435 million euros or 4.4% of all retail sales, similar to the EU organic share of food retail sales

	ORGANIC FARMLAND	2001	2022
	Area* (Share of Total Farmland)	35,877 ha (1.8%)	80,877 ha (4.4%)
	Area Growth from 2001 to 2022	123	3.2%
	ORGANIC LAND USE & AQUACULTURE	2001	2022
	Arable Land* (Share of Total)	16,001 ha (2.6%)	31,261 ha (3.1%)
İ	Permanent Crops* (Share of Total)	598 ha (2.9%)	968 ha (2.6%)
·	Grassland* (Share of Total)	18,890 ha (1.9%)	44,146 ha (5.7%)
	Aquaculture Production (Share of Total)	N/D	15,277 MT (38.7%) (2021)
	ORGANIC OPERATORS	2001	2022
	Producers (Share of Total)	1,528 (1.5%)	2,110 (4%)
	Aquaculture Producers	N/D	33
	Processors	N/D	1222
İ	Processors Importers	N/D N/D	1222 529
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	Importers	N/D	2022
	ORGANIC RETAIL SALES	2001	529
	ORGANIC RETAIL SALES Retail Sales (Share of Total)	N/D 2001 343 M € 21.5 €	529 <b>2022</b> 1,435 M€ (4.4%)

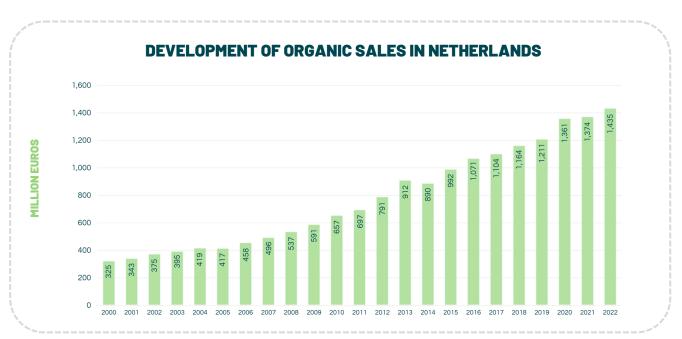
 $Source: FiBL\ survey\ based\ on\ national\ data\ sources, Eurostat\ and\ TRACES/European\ Commission\ in\ the\ framework\ of\ the\ Organic Targets\ 4EU\ project$ 



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Source: FiBL-AMI Survey based on Eurostat and Nic Lampkin



Source: FiBL-AMI Survey based on Bionext and LEI



# **CAP ORGANIC POLICY SUPPORT**

After a long period when the Netherlands was the only country in Europe not to support conversion to or maintenance of organic farming, the introduction of support for organic farming at the top level of the national eco-scheme marks a significant change in approach. The Netherlands CAP Strategic Plan sets a target of 6% of UAA to be supported as organic by 2027/8, with just over 6% of total environmental support and less than 2% of CAP funds allocated to organic. Some provinces provide additional conversion support not detailed here.



CONVERSION & MAINTENANCE	2018	2027
Land Area Supported (Change from 2018)*	0 kha	109 kha
Share of Total Agricultural Area Supported*	0%	6%
Share of Certified Organic Area Supported (Change)*	0%	N/D
Expenditure per Year*	0 M€	22 M€¹
Expenditure per Hectare Supported*	0€	200€

 $^1$ Planned expenditure values for NL eco-schemes have been estimated from per hectare rates and R29 indicators



SHARE OF CAP RESOURCES	CAP EXP. 2023-2027	ORGANIC SHARE*
Organic Farming Support (P1)*	95 M€	100%
Eco-Schemes (P1)	964 M€	0.004
Agri-Environment, Climate, Welfare (P2)	576 M€	6.2%
Total CAP Expenditure	4,899 M€	1.9%

 ${\it Organic\ eco-scheme\ expenditure\ estimated\ from\ per\ hectare\ rates\ and\ R29\ indicators}$ 

### CAP ORGANIC CONVERSION AND MAINTENANCE PAYMENTS FOR DIFFERENT LAND USES

INDICATOR	YEAR	FUND	GRASSLAND	ARABLE CROPS	HORTICULTURE	FRUIT CROPS
Conversion Support (€/ha)	2019	N/D	0	0	0	0
	2023	P1	200	200	200	200
Change from 2019 to 2023		ω	ω	ω	ω	
Maintenance Support	2019	N/D	0	0	0	0
(€/ha)	2023	P1	200	200	200	200
Change from 2019 to 2023 $$				ω	ω	
Conversion Support Higher than Maintenance		2019	0%	0%	0%	0%
		2023	0%	0%	0%	0%

P1(Pillar 1) European Agricultural Guarantee Fund (EAGF); P2 (Pillar 2) European Agricultural Fund for Rural Development (EAFRD) and national co-financing

<sup>\*</sup>including in-conversion and fully organic land

<sup>\*</sup>including in-conversion and fully organic land



## **NATIONAL ORGANIC ACTION PLAN**

Although the Netherlands had three action plans from 2001, there was a long period since 2010 with no new action plans. The latest action plan for 2023-2030 sets an ambitious target of 15% of UAA to be organic by 2030, but many of the actions proposed are early stage, exploratory initiatives, making the target challenging, also given the CAP CSP target of 6% UAA supported as organic in 2027/8.

### **TARGETS**

	PERIOD	LAND AREA TARGET	OTHER TARGETS
Previous Action Plan	None	None	None
Current Action Plan	2023-30	15% of UAA by 2030	25% of public procurement

#### **KEY ACTIONS**

### PREVIOUS ACTION PLAN (N/D) **CURRENT ACTION PLAN (2023 - 2030)** PRODUCTION Support via eco-scheme introduced, with additional conversion support through regional No previous plan rural area transition funds, and investments via sustainable agriculture investment fund Sector-led supply chain developments; explore options for price reductions; 25% target for **MARKETS** central government procurement – other authorities to follow; explore options for hospitality No previous plan catering; support export development; encourage retailer certification to reduce packaging; review control system to reduce costs; reform land leasing regulations Increase awareness of organic products and EU logo; review presentation with retailers; communicate sustainability benefits; establish national conversion helpline; encourage INFORMATION! knowledge exchange with other sectors; develop use of farm advisory service for conversion No previous plan advice and business planning; identify opportunities to improve knowledge dissemination including training, education also of advisors; develop research and innovation agenda aligned with EU programmes; research on how food services can contribute to increased sales

## **AQUACULTURE**

The organic share of total aquaculture production in the Netherlands is 20%. The Netherlands was not included in our analysis of the EMFF (2014-2020) and EMFAF (2021-2027) operational programmes and the Multi-annual National Strategic Plan for Aquaculture. Aquaculture was not highlighted in the current national organic action plan from 2023. As the funding is project specific and there is no ring-fenced organic budget, statistics on organic aquaculture support expenditure are not available.



