

## Factsheet Agri-food

### Holland is a world-leading supplier of sustainable, healthy, agri-food products

The Dutch agri-food sector is one of the main drivers of the Dutch economy with a contribution of almost 10 percent to the economy and employment. In the past centuries, the Dutch have created new land for agriculture through land reclamation and they built greenhouses to be able to grow a multitude of fruit and vegetables. Today, the Netherlands is the world's second largest exporter of agri-food products, after the USA. For decades, Dutch agriculture has succeeded in maintaining its lead over international competitors by continually investing in the renewal of agricultural production chains. The agri-food industry in the Netherlands is responsible for a proportionally greater share of national industrial production than any other country in the European Union, not least because the Netherlands is the home of several world-renowned agri-food multinationals.

The Netherlands is a hotbed of R&D in the area of agri-food, due largely to the excellent knowledge infrastructure consisting of several universities, research institutes and industrial R&D organizations. The Dutch government strongly supports all agri-food related activities in public-private partnerships, Innovation Programs, dedicated support organizations such as Food Valley and through investment in education and R&D in its broadest sense. Focus themes for the coming years as identified by industry, knowledge infrastructure and the government are: healthy food, food safety & quality, and sustainability & food security. Important R&D players are Wageningen University and Research Centre, the Top Institute Food & Nutrition (TIFN), the public-private innovation program FND+ (Food & Nutrition Delta), TNO (Netherlands Organization for Applied Scientific Research) and NIZO food research. The agri-food related curricula of, in particular, the universities of Wageningen, Groningen, Amsterdam, Utrecht and Maastricht also contribute to the Dutch agri-food successes. The agri-food knowledge infrastructure is supported by the presence of world-class institutes and R&D departments of companies in the areas of medicine, chemistry, logistics, high tech systems and other related industries.

### Key aspects and strengths

- The whole agri-food chain, from seed to consumer, has a very strong presence in the Netherlands. In each segment there are internationally operating world-class companies.
- The Dutch agri-food sector benefits from Holland's mild climate, flat and fertile soil and favourable location at the heart of Europe. The sector can capitalise on expertise in transport and logistics and the presence of the Port of Rotterdam and Amsterdam Airport Schiphol.
- The Food Valley region, centred around Wageningen University and Research Center, is one of the most authoritative agri-food and nutrition research centre in Europe, if not the world.
- Dutch suppliers to the agri-food industry are highly innovative and have internationally leading positions in, for example, ingredients, enzymes, animal breeder material and biological crop protection. Furthermore, The Netherlands is a global market leader in machinery for, for example, poultry processing, red meat, bakery and cheese production.
- NIZO food research owns the largest food testing pilot plant in Europe and is open to the entire food and ingredient industry.
- The Restaurant of the Future in Wageningen is unique in the world for its in-depth scientific approach to consumer choice. In this restaurant, which is also a laboratory, cameras monitor consumer behaviour relating to selection of products for consumption.
- In spite of tight profit margins, agricultural businesses have invested substantially in environmental protection and implemented improvements in animal welfare. Dutch agricultural entrepreneurs are front runners in efficient and sustainable production systems and processes, resulting in a productivity that is five times higher than the European average.

## Facts & figures

- Despite the economic crisis, the Dutch agri-food industry continues to grow. The total value of Dutch agricultural exports was € 72.8 billion in 2011, an increase of 9 percent from 2010.
- The Dutch agri-food industry contributes € 48 billion of added value to Dutch GDP and provides work and income, directly and indirectly, for more than 660,000 people.
- The sector has a strong international focus and accounts for 21 percent of Holland's total export value. Germany is Holland's largest trade partner for agricultural products: 26% of Dutch agri-food exports go to Germany.
- Four of the world's top 40 food and beverage companies are Dutch and twelve out of the 40 largest food & beverage companies have a major production site or R&D facilities in the Netherlands.
- Two Dutch universities are in the European top 10 with regard to the number of publications on agri-food subjects.
- The Netherlands has the second highest private R&D investment in agri-food, after Denmark.
- Turnover of the Dutch machinery for food processing sector is € 2.3 billion, of which 80% is exported.
- In Holland, organic food continues to gain in popularity. Dutch consumers spent over €752 million on organic products in 2010 – more than 13 percent up on 2009.

Sources: Statistics Netherlands (CBS), Dutch Federation of Agricultural and Horticultural Organisations (LTO), Wageningen University and Research Centre, NFIA ("Holland Food Valley"), Ministry of Economic Affairs, Agriculture and Innovation ("Top sector agro & food").

## Websites

- [www.tifn.nl](http://www.tifn.nl) - Top Institute Food & Nutrition
- [www.foodnutritiondelta.nl](http://www.foodnutritiondelta.nl) - Dutch food and nutrition innovation programme
- [www.foodvalley.nl](http://www.foodvalley.nl) - World-renowned food and nutrition research cluster
- [www.tno.nl](http://www.tno.nl) - Dutch technology research institute
- [www.nizo.com](http://www.nizo.com) - Dutch food research institute
- [www.wur.nl](http://www.wur.nl) - Dutch university and research centre in food, environment and health & lifestyle
- [www.lto.nl](http://www.lto.nl) - Dutch Federation of Agriculture and Horticulture