

# 共同農業政策與世貿組織下的荷蘭農業政策

荷蘭經濟部投資貿易政策組副組長  
範德流

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## 中文摘要

荷蘭農業是一項建立在高度機械化、高科技與最良好後勤的高科技事業。今日當荷蘭農夫不是件簡單的事。他們需要具備多種技術。在此本人所要提出與各位一起探討的三個問題。荷蘭農業所面臨的主要挑戰為何？荷蘭的共同農業政策(CAP)的主要目標與背景以及前兩者是如何與荷蘭 WTO 整體政策互動。

然而，荷蘭雖是小國但卻是個農業超強，在出口農產品方面是僅次於美國與法國的世界第三大農產品出口國。佔世界農產品貿易的百分之六。百分之五十七的荷蘭四萬一千平方公里的國土是用於農耕。這正是證明何以荷蘭農業發展成功的要因之一，即該國國土平坦、肥沃與交通便利，以及能使荷人能充分利用土地資源。百分之五十一的農耕地是草地，百分之四十一則用來栽種穀物，而百分之八只用作園藝。二〇〇一年農業佔荷蘭生產總值的百分之三，是由九千兩百七十三個農場所雇用的二十六萬九千人所創造而來的。荷蘭的主要農作物為穀物、玉米、馬鈴薯與甜菜。以二〇〇〇年為例，農作物總產值約為二十一歐元。比農作物更重要的是動物(奶製品與肉)，所創造的產值為八十一歐元。包括水果、蔬菜、植物與花卉等園藝產值則有七十六億歐元。

當然農業本身只是農業食品工業的一部分。在經濟上(附加價值、就業與出口)更重要的是那些支撐產業(包括肥料、機械、

殺蟲劑等)分配與加工業。二〇〇〇年整體農業食品工業佔荷蘭就業人口的百分之十點七，佔生產總值的百分之九。若就附加價值來看，整體農業食品工業附加價值總值達三百九十億歐元，其中百分之二十來自農業，其餘的則來自支撐工業加工與分配。

至於貿易方面，二〇〇一年荷蘭農業食品工業出口總值為四百五十三億歐元，佔其總出口的五分之一。同年進口農業產品總值則達兩百七十一億歐元，因而使荷蘭擁有一百八十二億歐元的貿易順差。大約百分之七十五的荷蘭農業產出則以出口為導向。園藝是這方面最重要的次產業。大約全球裝飾用植物貿易的百分之六十來自荷蘭，尤其全球花苞貿易市場荷蘭囊括超過百分之九十。超過百分之七十五的荷蘭農業出口是前往 EU，由於二〇〇四年的 EU 將擴大，此一比例料將更加提高。在 EU 裡，主要荷蘭農產品的買主為法國、比利時、德國與英國。對荷蘭而言，亞洲是個小而正在發展中的市場。二〇〇一年荷蘭對亞洲出口總值達二十四億歐元，但有鑒於亞洲整體皆呈現成長，預期在未來將有更實質的增加。

以上為農業食品業對荷蘭經濟的重要性。荷蘭之所以能發展成農業超強，主要有以下幾個因素：一、擁有肥沃的土地；二、透過研發不斷創新(如採用溫室技術使很多園藝不需種植在土地上，發展新產品)並擁有一個訓練農民的教育體系；三、良好的合作組織以提供農民財政、共同生產設備(如奶製品工廠)以及分配設施(如拍賣花卉、植物與蔬菜的場所)；四、政府透過土地參與創造規模經濟；五、荷蘭位居歐洲主要地區的核心位置；六、良好的運輸以及後勤補給的設施；七、荷蘭具有悠久的重商主義傳統；八、從大使館到領事館，荷蘭皆派有主要農業官員來負責農業事務，具有廣泛的聯繫網絡；九、EU 共同農業政策提供荷蘭農業食品工業一個龐大的「國內」市場，以及各種補助。

荷蘭農業所面臨的主要挑戰

數十年來荷蘭農業政策都朝不斷擴大發展。生產與出口接二連三地屢創紀錄。但至八〇年代、九〇年代，此一發展模式開始出現負面跡象。主要問題是：一、景觀的退化；二、環境的退化；三、動物福利和健康問題；四、消費者信心的降低。此外，對 EU 農業政策扭曲市場的做法之批評與日據增。不僅全球如此，荷蘭國內越來越對 EU 利用高關稅與補助來阻絕外國競爭、攻佔外國市場的做法大加譏伐。



## **Dutch Agricultural Policy in the Context of CAP and WTO**

**Willem H. van der Leeuw**

Deputy Director for Trade and Investment, the Dutch Ministry of  
Economic Affairs

Key words : Netherland, Agricultural Policy, CAP, WTO, EU

Distinguished guests, ladies and gentlemen,

The Netherlands prides itself of being a modern country. Yet, if one asks the average foreigner what comes to his mind when he thinks of the Netherlands, the answer is likely to be windmills and tulips. No wonder, when our Netherlands Trade and Investment Office here in Taipei uses an orange tulip for its logo!

But perhaps this image is not as backward as it would seem at first sight. In fact, there is more to the tulip than meets the eye. The Dutch agro sector is a high tech-business, built upon a very high degree of mechanisation, advanced science and optimal logistics. Being a Dutch farmer nowadays is no simple business, but requires an enormous array of skills.

Today I intend to discuss three questions with you:

- What are the main challenges facing the Dutch agricultural sector?
- What are our main goals with regard to the Common Agricultural Policy (CAP) and why?

- How does this interact with our overall policy with regard to the WTO?

In the limited time we have available today, it is impossible to tell you everything that is worth knowing about Dutch agriculture. Apart from this lack of time, I hasten to admit that my expertise in the field is limited. Agriculture is just one of the many subjects I am dealing with in my job as deputy director of the Department of Trade Policy and International Investment of the Ministry of Economic Affairs. But, if one is dealing with international trade policy and the WTO, there is no escape from agriculture, as you will be aware yourself. That is why it is fitting to have this subject on the agenda of today's conference. And I hope that I will at least be able to give you a broad picture which will help you understand our position on agriculture in the WTO.

Before we begin to address the three questions I just mentioned, I will sketch a brief picture of the Dutch agro sector. One cannot understand policy unless one knows a little of the object of this policy.

The Netherlands is a small country, with a surface of just over 41,000 square kilometres. About 18% of that surface is water. More than 16 million people live on this tiny surface, making the Netherlands one of the most densely populated countries on earth. Yet, this small country is an agricultural superpower, ranking third after the USA and France as an exporter of agro food products, with a share of 6% of world trade.

Of that total surface of 41,000 square kilometres, 57% is used for agriculture. This may sound surprising, but it illustrates one of the reasons which, throughout history, have contributed to

the development and success of Dutch agriculture: the country is flat, fertile and accessible, enabling the population to use it to the maximum.

Of agricultural land 51% is grassland, 41% is used for crops and the remaining 8% for horticulture.

In 2001 farming represented about 3% of the total value of production in the Netherlands. This value was produced by 92,783 farms, which employed 269,000 people.

In the European context, Dutch agriculture is relatively big. Whereas our population is only 4.6% of the total population of EU-15, in terms of gross production value our share is 6.5%.

The main crops are cereals, maize, potatoes and beets. The total value of crops in 2000 was about 2 billion euros (1 euro = ± 1,10 US \$).

More important than crops are animals (dairy and meat). The 16 million Dutchmen share their country with 4 million cows (and a few bulls), 1.5 million sheep and goats, 13 million pigs and over a 100 million chickens and other birds. The total value produced by this sector was 8.1 billion euros in 2000.

Horticulture (fruits, vegetables, plants and flowers) was good for a production value of 7.6 billion euros in 2000.

Farming itself is, of course, only part of the agro food complex. Even more important in economic terms (added value, employment, exports) are the supporting industries (fertilizer,

machinery, pesticides etc), distribution and, of course, the processing industry.

In total, this whole agro food complex was still good for about 10.7 % of Dutch employment in 2000. It represented about 9% of total production value.

If one looks at added value, the whole agro food complex was good for a total added value of 39 billion euros, about 20% of which came from farms and the rest from the supporting industries, processing and distribution.

In 1999 the Dutch food and beverage industry consisted of 6680 companies with a total net turnover of 48.5 billion euros (25% of the total net turnover of Dutch industrial companies). It employed about 113,500 people (17% of total industrial employment).

It includes well-known multinal companies like Unilever and Heineken.

Let us have a brief look at trade. Our agro food sector exported 45.3 billion euros' worth of goods in 2001. This represented about a fifth of our total exports.

Imports of agricultural products amounted to 27.1 billion euros in 2001, leading to a surplus on our trade balance of 18.2 billion euros. According to the first figures over 2002 this surplus has grown to almost 20 billion.

Some 75% of our agricultural production is exported. Horticulture is the most important subsector in this respect. About 60% of world trade in ornamental plants comes from the Netherlands. For flower bulbs our share of world trade is even over 90%.

In 2001 we exported  $\pm 7$  billion euros' worth of plants and flowers. Fresh vegetables were good for  $\pm 3$  billion, whereas preparations of potatoes, fruit and vegetables amounted to 2.5 billion. Other main agro export sectors are meat ( $\pm 5$  billion) and dairy products ( $\pm 4$  billion).

More than three quarters of our agricultural exports go to our present EU partners.

With the enlargement of the EU next year, this percentage is likely to rise even further.

Within the EU our main clients are Germany, Belgium, France and the UK.

Asia is still a small -but growing- market. In 2001 we exported 2.4 billion euros' worth of agro products to that region ( $\pm 5.3\%$  of the total). But in view of the favorable overall growth perspectives for Asia we expect a substantial increase in the future.

Of our agro imports, about 60% comes from from our EU partners. Asia's share was 8.5 percent.

Enough of these figures. I hope they have given you a general impression of the importance of the agro food complex for the Dutch economy.

How did we achieve our status of 'agricultural superpower'?

I believe that, inter alia, following factors played a role:  
1) the availability of fertile land;



- 2) constant innovation (e.g. using windmills to drain vast tracts of land as from the 17<sup>th</sup> century, advanced breeding techniques, greenhouse technology freeing a large part of our horticulture from the soil, developing new products) through research (e.g. Agricultural University of Wageningen), an educational system for training farmers and a good system for disseminating knowledge and information.
- 3) well-developed co-operative structures providing finance (co-operative banks), common production facilities (e.a. dairy factories) and distribution facilities (e.a. auction halls for flowers, plants and vegetables) to farmers.
- 4) participation by the government in creating economies of scale (e.a. through land consolidation).
- 5) the location of the Netherlands at the heart of Europe's main industrial region (Germany, France, UK).
- 6) excellent transportation and logistical facilities: e.g. Rotterdam seaport and Amsterdam airport.
- 7) a keenly developed mercantile spirit (The Netherlands has always been a nation of traders).
- 8) a extensive network of agricultural attachés operating from our embassies and consulates.
- 9) the Common Agricultural Policy of the European Union, which provides our agro food sector with a big 'domestic' market and with a variety of subsidies.

*What are the main challenges facing the Dutch agricultural sector?*

For many decades our agricultural policy was geared towards constant expansion. Production and exports broke one record after another. In the eighties and nineties the negative aspects of

this growth model began to make themselves felt. The main problems were:

1) Degradation of the landscape: the ever-increasing scale of agricultural production led to the disappearance of characteristic landscapes and farm buildings with considerable recreational and touristic value.

2) Degradation of the environment. A notable manifestation of this problem was the huge manure surplus produced by highly intensive forms of pig breeding during the eighties and early nineties. In our Province of Brabant ammonia fumes could be smelt everywhere. Trees and plants were killed.

3) Animal welfare and health problems: large-scale bio industry, with enormous amounts of animals kept on relatively small surfaces and frequent long-distance transport of living animals led to a serious degradation of animal welfare. It also led to massive outbreaks of disease: food and mouth disease, BSE, fowl pest, to name but three. In order to contain these epidemics, millions of animals, even healthy ones, had to be killed. Day after day the Dutch television viewer saw these gory scenes of mass destruction on his TV screen. Not only did these epidemics cause enormous economic damage, they also seriously tainted the sector's image with the public.

4) Dwindling consumer confidence: more and more, mass production in combination with modern technology made many consumers lose faith in the quality and even the safety of agricultural products. In Germany, our most important market, our "industrially produced" tomatoes and other agro products acquired a negative reputation and rapidly began to lose market share to "home grown" or "naturally grown" products.

In addition, there was a growing criticism of the market-distorting aspects of the EU's agricultural policy: not only in the

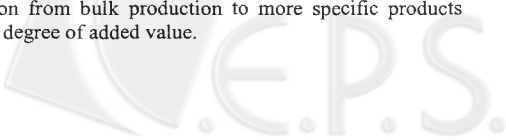
world at large, but also in the Netherlands itself people became increasingly critical of the high tariffs and subsidies the EU uses to keep out foreign competition and conquer foreign markets. More and more, people became aware of the negative effects of the CAP on prices and on more efficient producers elsewhere, in particular in developing countries.

Also, the increasing drain of the CAP on Dutch taxpayers' money, became an issue in Dutch politics. As the CAP represents 45% of total EU expenditure (44 billion euros in absolute terms in 2001), it is a major cause of our growing net contribution to the EU budget (the highest per capita amount in EU-15). The enlargement of the EU with 10 new Member States would greatly increase the cost of an unchanged CAP.

All these factors, together with the dwindling number of people working as farmers, led to a situation in which the traditional model of agriculture had lost its appeal with the general public and, gradually, also its political acceptance. The time was ripe for change.

In July 2000 the Ministry of Agriculture issued a major policy document on the future of Dutch agriculture called "Food and Green". Dutch agricultural policy was to steer away from ever increasing bulk production. Henceforth, the overall aim of our agricultural policy would be: "a sustainable agricultural sector, which is able to face international competition on its own, which is anchored to society and which plays a leading role in Europe". In practice this policy means, inter alia, the following:

- a transition from bulk production to more specific products with a high degree of added value.



- a shift from competition on the basis of price towards competition on the basis of quality.
- less pressure from agriculture on the environment.
- tough rules for food safety.
- a strong emphasis on animal welfare.
- more attention for the role of farming in the preservation of the landscape.
- more choice and information for consumers.
- a more market-oriented agriculture through:
  - . a decrease in subsidies, in particular price support and export restitutions.
  - . less protection through trade barriers.

Of course, not all of this new policy was new. For instance, the Netherlands had been an advocate of lower trade barriers and subsidies for a long time. As for environmental protection, legal measures had already contributed to halving ammonia emissions and the use of pesticides compared to the levels of the mid-eighties. What was new was the notion that agriculture could not continue like it had since World War II and that a drastic transformation was necessary.

#### *The European dimension of agricultural reform*

Only a small part of the above policy can be realised within the Dutch context. Much more important is the European dimension. Prices of important agricultural products and the corresponding domestic and export subsidies are fixed at EU level. So is border protection, because trade policy is the exclusive domain of the EU. In addition, there is a host of European legislation regulating food safety, animal welfare and other standards for agricultural products. The admission of novel

foods and the labelling of gen tech products, for instance, is regulated at EU level.

A lot of Dutch ministries, including my own Ministry of Economic Affairs, are involved in the making of European policies that will shape the future of our agricultural sector. Agricultural policy is Cabinet policy, not just the policy of the Ministry of Agriculture.

As far as the CAP is concerned, subsidies and border protection attract most of the attention. This is not only caused by a growing pressure from the EU's trading partners, but also by internal concerns about the cost of the CAP and the distribution of the corresponding financial burden.

In the early eighties, about 70% of the EU budget went to the CAP. As the importance of agriculture in the EU economy diminished and new policy needs arose, it became more and more difficult to explain why so much of the EU budget should be spent on agriculture. Also, it became a bone of contention, particularly for those Member States, who, like the UK, benefitted relatively little from the CAP, but had to pay a lot. When, in the nineties, the Netherlands became a net contributor to the EU budget, the cost of the CAP also became a political issue for us.

Since the early nineties the EU has taken a number of steps to reform the CAP. Its relative cost has gone down from 70% tot 45% of the EU budget. The so-called MacSharry reforms, Agenda 2000 and this year's "mid-term review" all go in the same direction: bringing EU prices more in line with the world

market, moving subsidies away from price support and de-linking subsidies from production.

In this way the butter and meat mountains and all the other surpluses of the past can be avoided and EU export restitutions will gradually stop distorting the world market.

In the EU, the Netherlands is among the most reform-minded Member-States. This is so for a number of reasons:

- 1) the political desire to diminish our net contribution to the EU budget.
- 2) the fact that our primary agricultural production is strong in those sectors where EU price support measures play a relatively modest role (e.g. horticulture).
- 3) the fact that our processing industry is less and less dependent upon the Dutch primary sector and can flourish while sourcing its inputs from elsewhere.
- 4) the relatively modest significance of our primary agriculture in economic (and employment) terms.
- 5) the fact that under the Dutch electoral system of proportional representation farmers do not constitute an important political force (in fact, for the reasons I mentioned earlier, farmers are not very popular in Dutch politics).
- 6) our centuries-old tradition of free trade and open borders.
- 7) a strong moral streak in Dutch Foreign policy: unlike farmers, the interests of developing countries play a significant role in Dutch politics.

In the EU as a whole, the situation is different. In countries like France, Spain and Italy and even in Germany, farmers and farmer interests are much more important, especially from a political point of view. In France, agriculture is considered as an

important part of the French way of life. Hence, in France decisions on the reform of the CAP can only be taken by the President himself.

How does this interact with our overall policy with regard to the WTO?

What I just said about Dutch policy on agriculture in the EU context means that our attitude towards agriculture in WTO negotiations is less defensive than that of the EU as a whole. We are more relaxed about far-reaching reductions in price support measures and border protection.

This relaxed attitude recently found support in a study of the Erasmus University of Rotterdam and the Dutch Institute of Agricultural Economics (LEI) into the possible consequences of far-reaching trade liberalisation in the WTO. The study showed that a 50% reduction of import tariffs, export subsidies and domestic subsidies would not have dramatic consequences for the Dutch agro food complex. The important processed foods industry would even see a strong growth in exports. Cereals and sugar are likely to suffer most, but these are not the most important subsectors in Dutch agriculture.

There is a broad feeling in the Netherlands that the defence of agricultural interests should not be an obstacle to the realisation of more important goals we have in the WTO, like increased access to foreign markets for our services and industrial products (services alone represent between 70 and 80% of our GDP). A less restrictive and distortive EU agricultural policy is also the key towards a better integration of the developing countries into the multilateral trading system.

And that, in turn, we consider a vital condition for the future health of that system and the WTO.

This is not to say that we do not have goals for the WTO negotiations on agriculture as such. The Dutch agricultural sector, though nowadays of a lesser weight than other sectors, remains a valuable asset to our economy. In addition, continued agricultural activity plays a role in the preservation of the landscape and has recreational value.

We think that most of our agriculture can survive without price support, export subsidies and high tariffs. But it can only do so on a level playing field. Other developed countries also must open their markets and eliminate their own kinds of trade distorting subsidies. Emerging markets like China and other industrialising countries cannot be allowed to keep their agricultural markets closed. Only the poorest developing countries should not be obliged to make - at least some - concessions.

Another negotiating goal has to do with so-called non-trade concerns like animal welfare, environmental protection and the preservation of the landscape. As I said earlier, such values are an integral part of our new agricultural policy. Non-trade concerns, however, are not very popular in the WTO. Many WTO partners fear they will be abused for protectionist policies.

We understand that we cannot impose our own values on our WTO partners. And it is certainly not our intention to block their exports to our market. But we feel that to further the respect of these values in our own agriculture we need to be able to take



certain measures like labelling or green box subsidies. If such measures are not allowed, imposing high standards on our own producers may become very difficult or even impossible, because this would seriously endanger their competitive position vis-à-vis producers from countries with lesser standards.

We feel, however, that such arguments can only be convincing if the EU makes it clear that it is ready to make really significant concessions whereas trade-distortive subsidies and border protection are concerned.

Outside the context of the Doha Round we will continue to stress the importance of a strict maintenance of existing WTO disciplines on veterinary and phytosanitary measures. Without such maintenance our agricultural exports could easily be blocked - as has happened often in the past - on some flimsy excuse, thus undermining the positive effects of tariff reduction. To us the SPS agreement is one of the most important WTO agreements.

I have spoken for too long. I hope I have been able to give you at least an overall picture of our agricultural policy. As for me, I would like to hear your views on this subject.

Thank you for your attention.

