

Reporting

# Farmers Deserve Better!

Research into improvements in the earnings model and sustainability rewards for Dutch livestock farmers

(google doc translated from Dutch)

May 2024





## INTRODUCTION

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## INTRODUCTION

# Introduction

The report before you is the result of a market research conducted by Prosu on behalf of TAPP Coalition among Dutch livestock farmers. This research was set up to gain insight into the opinions and needs of livestock farmers regarding possible improvements in their business model and the rewards for sustainability in the sector. The aim is to identify policy measures that can contribute to a fairer income and more sustainable business operations, both through the market and through the government.

The findings in this report are based on a survey in which 453 livestock farmers participated. This group consists of 393 regular livestock farmers who are representative for the Netherlands. In addition, the questionnaire was shared among livestock farmers who are members of one of the interest groups affiliated with TAPP Coalition or GroenBoerenPlan (GBP), such as organic livestock farmers, Caring Farmers or the Dairy Network GRONDig . These 60 respondents, who are often more committed to organic and sustainable agricultural practices, offer a valuable point of comparison with the other participants.

The results were collected both by telephone and by means of a digital survey and provide a representative picture of the current positions and wishes of the livestock farmers. The group of 453 livestock farmers was not included in the research, because there would be an overrepresentation of organic livestock farmers. Therefore, for the representative part of the livestock farmers, only the survey results of the group of 393 regular livestock farmers were used.

The most striking finding is that 53% of livestock farmers support a German animal welfare plan - also in the Netherlands - for a higher VAT on meat, dairy and eggs, provided that the additional VAT revenues are used to give farmers a one-off compensation for twenty years for animal- and environmentally friendly stable adjustments, both in Germany and abroad.





## INTRODUCTION

# Method of research

### Data collection method

The data was obtained by conducting telephone and digital interviews. Interviews were conducted from week 17 to week 21 of 2024.

The respondents were selected from the National Agricultural Database of Prosu. The target group consists of Dutch livestock farmers with the following characteristics:

- Dairy farmers with at least 50 dairy cows.
- Poultry farms with at least 10,000 poultry.
- Pig farmers with at least 500 pigs.

The table below shows the distribution per target group. In this report we call the representative group of 393 farmers 'General' and the separate group of 60 farmers interviewed 'TAPP Members/GBP', summarized as 'TAPP members'.

Target audience	General	TAPP-Members/G BP	Total
Dairy cattle	231	37	268
Poultry	54	2	56
Pigs	108	15	123
Mixed	0	6	6
<b>Total</b>	<b>393</b>	<b>60</b>	<b>453</b>

### Representativeness

The total population of these Dutch livestock farms consists of 15,859. From this target group, 393 respondents participated in this research. As a result, the results have a reliability level of 95% with a margin of error of 5%.





## INTRODUCTION

# Background of the target group.

This page further explains the background of the target group.

### Interest groups

A total of 393 complete surveys were completed among 231 dairy farmers, 108 pig farmers and 54 poultry farmers. Of these 393 livestock farmers, 59 percent were members of LTO-Nederland (232 livestock farmers), 15 percent of NMV or DDB (dairy farming unions, resp. 39 and 20 livestock farmers), 11 percent of POV (pig farming union), 6 percent of Agractie (22 livestock farmers), 4 percent of Farmers Defense Force (17 livestock farmers), 3 percent of NAJK (13 young farmers), 16 of NVP (4 percent) and 3 percent of BioHuis (12 organic livestock farmers). Three livestock farmers are affiliated with Netwerk Grondig, 1 with Caring Farmers and 1 with the BD association.

Of the group of 60 livestock farmers (whose sector organisation is affiliated with TAPP Coalition or GBP), 37 are affiliated with Biohuis (organic farming), 21 with Dairy Farmers Network GRONDig, 12 with the BD Association, 11 with Caring Farmers and 2 with Herenboeren. Apparently, 21 of the 60 livestock farmers are members of multiple organisations. This also applies to their memberships with LTO-Nederland (24 livestock farmers), POV (4), NAJK (3), DDB (3), NMV (2), NVP and Farmers Defence Force (1).

### Age

The average age of the respondent is ... years.  
There are \* respondents under 55 and \* respondents over 55 years old.

### Political preference



# Summary

The research shows that the majority of Dutch livestock farmers are open to environmentally friendly tax measures, provided that they are accompanied by fair income compensations. This research emphasizes the willingness of livestock farmers to support sustainable measures and provides insight into their preferences and wishes towards the new cabinet.

## **Livestock farmers support VAT increase on meat**

A significant proportion of livestock farmers support a tax measure similar to the German 'Tierwohl Cent' model, where consumers pay slightly more for meat, dairy and eggs through a VAT increase. The proceeds from this are used to compensate farmers for animal and environmentally friendly barn adaptations. In addition, livestock farmers stress the need for a higher price for their products, with many stating that they need a price increase of at least 11% or even at least 21% to earn a fair income.

## **A meat tax is preferred over an environmental tax for farmers**

The research also shows that most farmers would prefer a meat tax for consumers rather than an environmental tax that they have to pay themselves, if the environmental costs of meat have to be taken into account somewhere. Furthermore, many farmers believe that supermarkets should be required to pay a fair price for their products. There is also broad support for an

EU import tax on products such as soy, meat, eggs and dairy that are produced with lower environmental or animal welfare standards than in the EU.

## **Organic farmers expect more**

Among farmers who are members of a farmers' organisation affiliated with the TAPP Coalition or the GroenBoerenPlan, support for these measures is even greater. This group of farmers, including many organic farmers, shows that they are very positive about tax measures and an EU agricultural emissions trading system, as long as this contributes to a fairer income.

The research underlines that livestock farmers welcome innovative solutions that improve both the environment and their own economic position, but that they have clear expectations of the new cabinet and the Minister of Agriculture.



RESULTS

# Current income



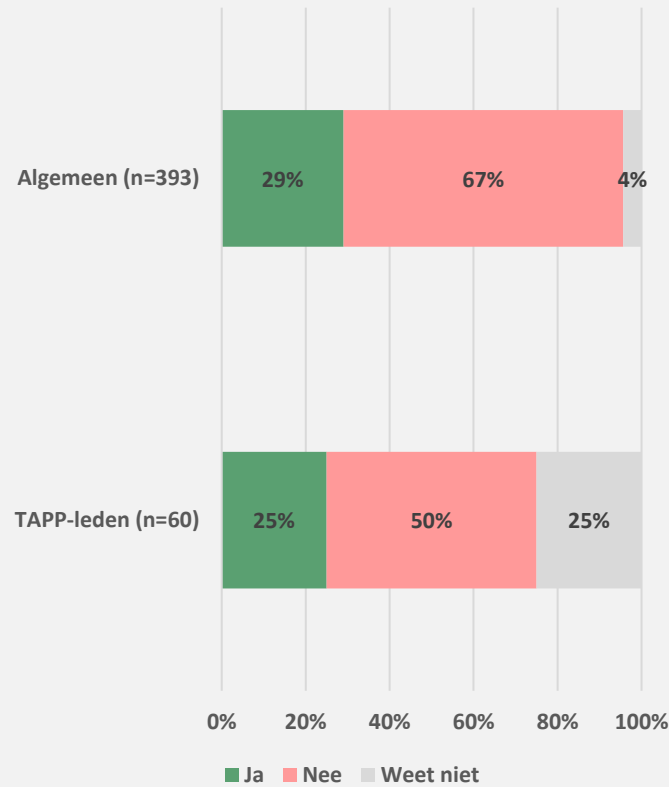
## RESULTS

# Fair income

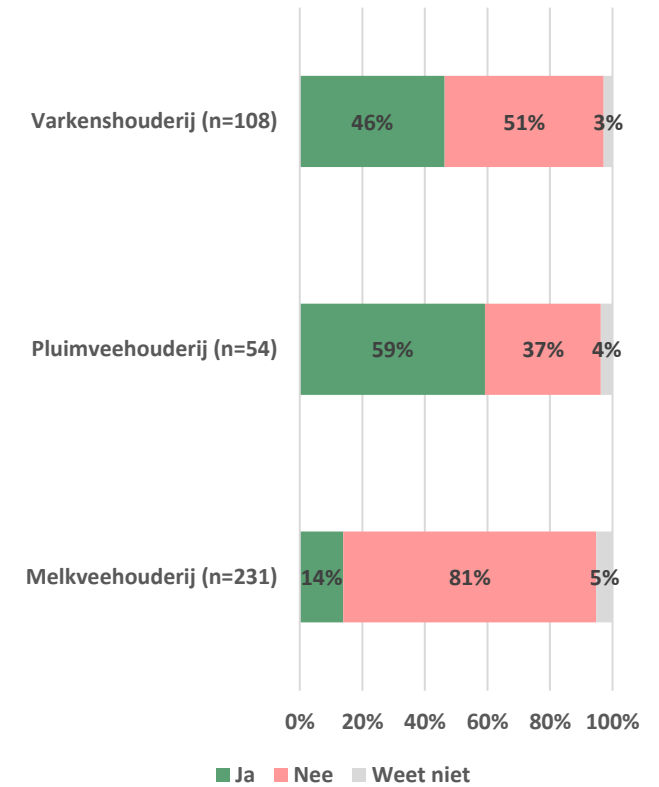
Do you think you currently earn a fair income from your livestock farming?

- Only 29% of livestock farmers feel they currently earn a fair income.
- A majority of 67% feel that they do not receive a fair income.
- Dairy farmers are the most dissatisfied, with only 14% saying they earn a fair income and 81% saying they do not.
- Poultry farmers are more positive, with 59% believing they receive a fair income, compared to 37% who do not.

Percentage of livestock farmers that think they earn an honest income



Percentage of livestock farmers that thinks they earn an honestly income





# Why do you think you are not earning an honest living right now?

Respondents who indicated that they did not earn a fair income were asked to explain this. This page shows examples of answers given by respondents.

- All kinds of things are expected of me while I have to wait and see whether the market is willing to pay for it.
- Milk prices are too low in relation to what you have to do for it
- When products in the store cost four times more than what we get for them, something is wrong.
- The cost package has increased shockingly and the milk price has not risen accordingly.
- I work with heart for the environment and am prepared to go the extra mile for a healthy and beautiful living environment. But the collective does not yet sufficiently appreciate this effort. Buyers now determine the price.
- No fair policy. Costs are spiraling out of control.
- The costs outweigh the benefits.
- When I look at what other people earn, many sectors have risen by 10% in recent times, but not farmers.
- The capital involved for 1 liter of milk, such as land, production rights and permits, is too high for the yield.
- There is a big difference between the store and the farmer
- The ratio is not right. The products and the costs cannot be passed on to the consumer.
- For an organic product, the cost price is high due to relatively much manual labour, while the food must remain cheap in the supermarket. This squeezes the farmer.
- We are technically doing well according to organic regulations, but we still have difficulty making money.
- The sales price of BD milk is too low and not balanced compared to other milk flows and the additional conditions.
- We are oppressed by the large purchasing organization. In terms of regulations, more and more is being asked to comply with, but this is met with negativity rather than appreciation.
- There is no good business model
- We are the last link in the chain and cannot implement price increases like the processing industry.

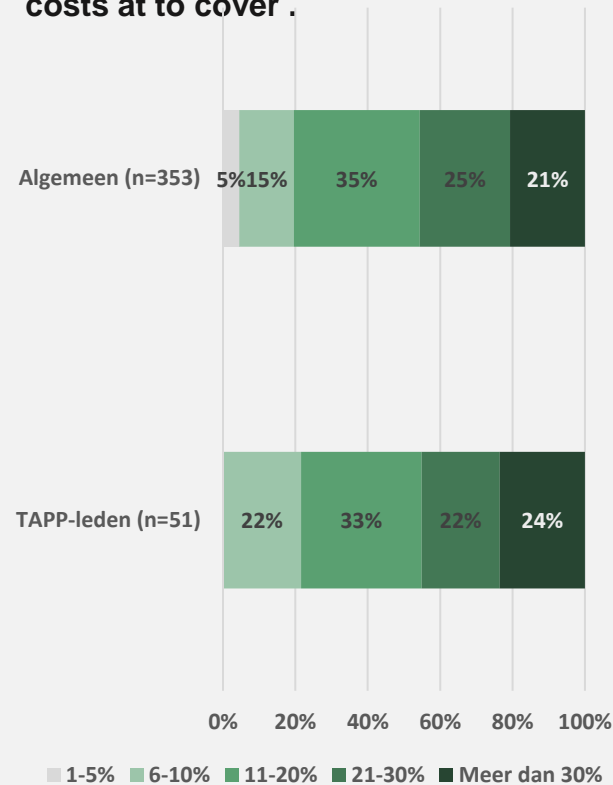
RESULTS

# Increase in current income

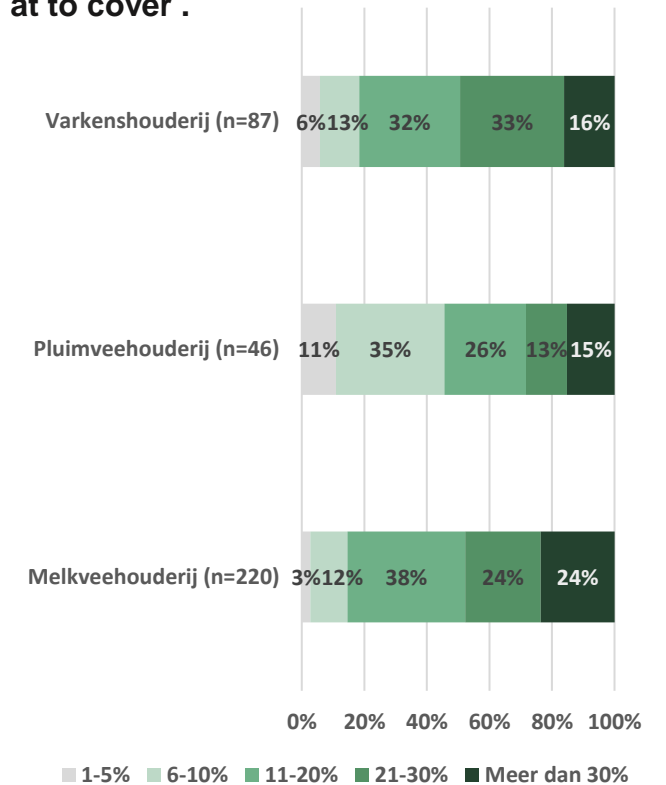
By what percentage should the sales price of your products increase in the coming years to achieve a fair income and finance additional measures in the field of the environment and/or animal welfare?

- 80% require a surcharge of at least 11%.
- Half of them will only consider the price to be fair if supermarkets pay them at least 21% extra.

Additional price paid by livestock farmers say necessary at have to of a honestly income at speak about costs at to cover .



Additional price paid by livestock farmers say necessary at have to of a honest income at speak about costs at to cover .





## RESULTS

# Conclusions current income

The research shows that a large proportion of Dutch livestock farmers are dissatisfied with their current income. Only 28% of livestock farmers believe they earn a fair income, while 64% do not experience this. Dairy farmers are the most dissatisfied, with 81% indicating that they do not receive a fair income, while poultry farmers are relatively more positive at 59%.

The main reasons for this dissatisfaction are the low prices farmers receive for their products compared to the retail prices, the sharply increased costs that are not compensated by higher incomes, and a feeling of undervaluation of their efforts and sustainability. Farmers experience that as the last link in the chain they have little influence on the price determination, while the market and buyers dominate the prices. There is a clear need for fair compensation and better appreciation for the farming sector.

In the context of the concept agricultural agreement, Dutch supermarkets would make agreements on a higher standard (environment, animal welfare) for food, whereby Dutch farmers would then receive a higher price, comparable to the program Better for Nature and Farmer of Albert Heijn. The necessity to still come to such agreements is great as far as the livestock farmers from this survey are concerned. This also applies to (higher) prices for organic farmers.



RESULTS

# Realistic income

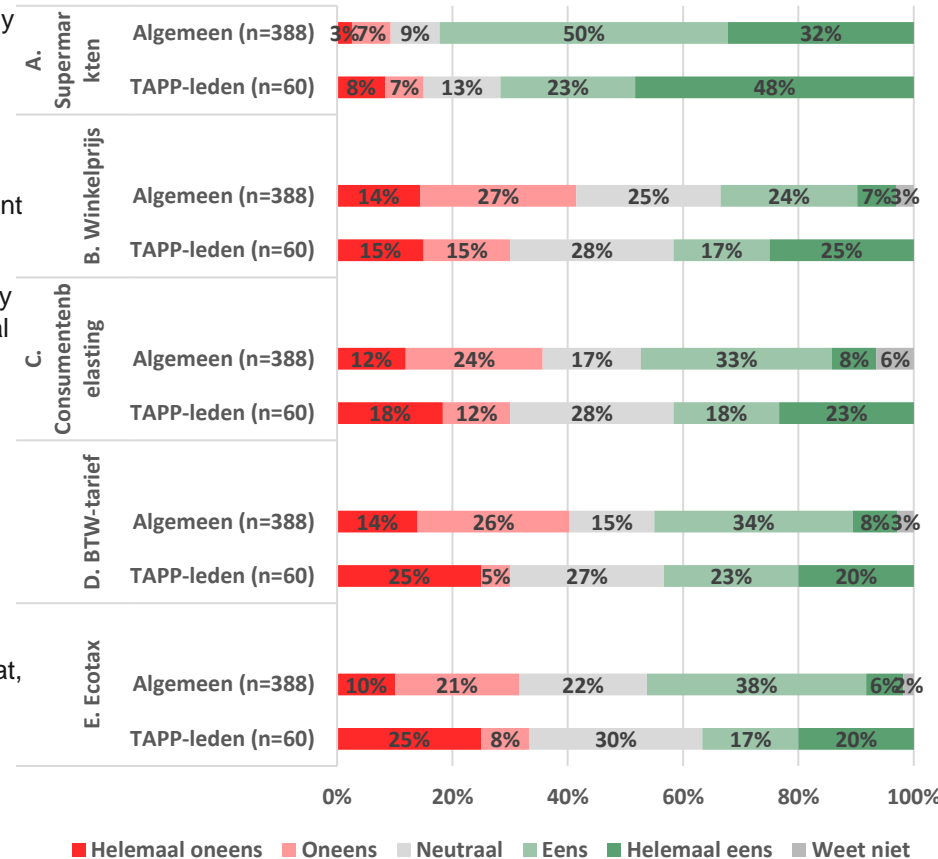




# Consumer price statements

## Part I

- A. Supermarkets in the Netherlands, like in some other EU countries such as Spain, must be legally obliged to pay a minimum cost-covering price to farmers, including a surcharge for sustainability/animal welfare, with high fines for violations.
- B. The impact of meat production on the environment must be reflected in the retail price of meat.
- C. A consumer tax on meat or dairy is a better policy instrument to take into account the environmental costs of meat production than an environmental levy on farmers themselves.
- D. The normal VAT rate (from 9% to 21%) may be introduced on meat if the additional price is permanently returned to livestock farmers for sustainability and/or animal welfare measures of their choice.
- E. If an ecotax, excise duty or consumer tax on meat, dairy or eggs increases my income, I would support it.



- A significant proportion of farmers agree with the statement that supermarkets should be legally required to pay a cost-covering price. Among TAPP members, 71% agree or strongly agree, compared to 82% of general farmers.
- When asked whether environmental taxes on meat and dairy should be paid by the consumer or the livestock farmer, most farmers choose the consumer.
- There are slightly more supporters than opponents among livestock farmers for increasing VAT on meat if that additional price is channeled back to livestock farmers for a higher income (for the environment/animal welfare, among other things). But the supporters do not have a majority.

# Consumer price statements

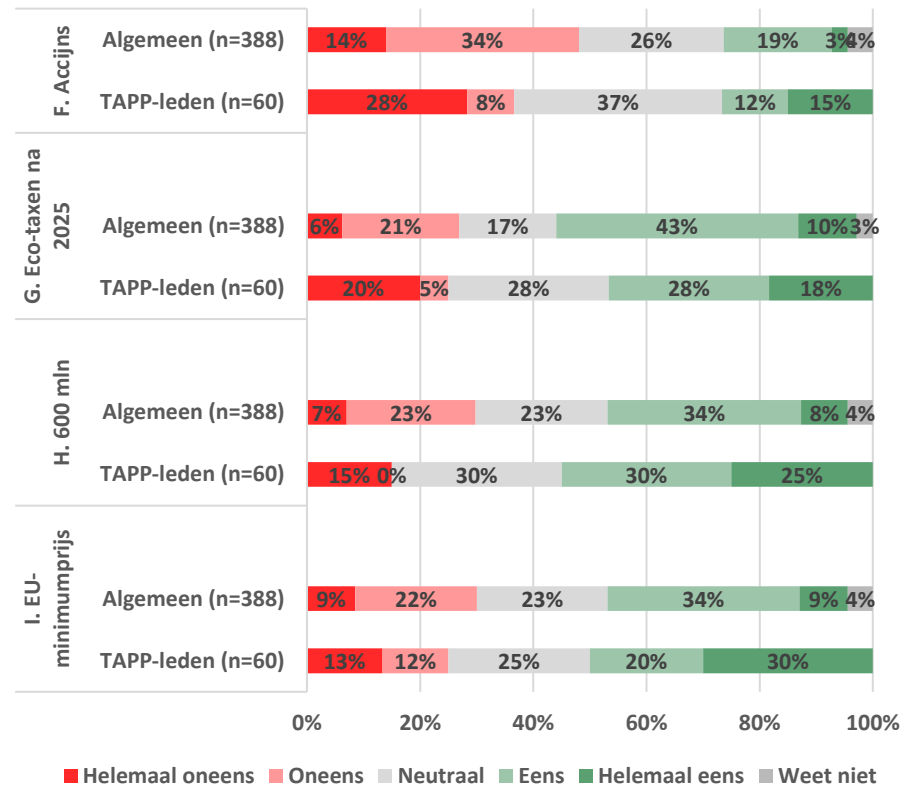
## Part II

F. The Netherlands had an excise duty on meat from the Middle Ages until the Second World War, which would still suit the Netherlands perfectly today.

G. I support the proposal from the LTO vision for the future 2030 that eco-taxes on food for consumers may be introduced after 2025, with the tax revenue going back to farmers if supermarkets do not pay cost-covering additional price compensation to farmers.

H. The draft agricultural agreement stated that farmers would receive an additional 600 million euros per year for payments for climate, water, nature and animal welfare, reimbursed from the proposed consumer levies on food. A new cabinet will still have to arrange this.

I. In order to offer all EU farmers a cost-covering price including higher environmental and animal welfare requirements, an EU minimum price should be introduced within the livestock sector. This should be linked to flexible production control, comparable to the previous milk quota.



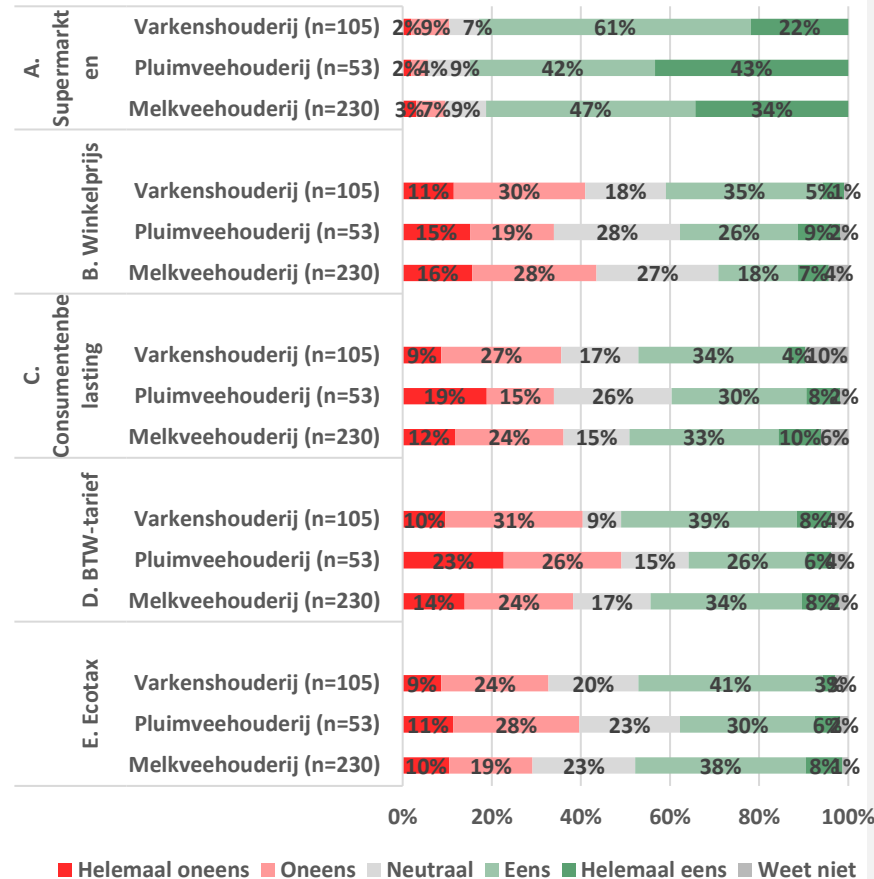
- There is a majority of 53% of livestock farmers in the Netherlands in favor of an eco-tax on food for consumers from 2025, with the levy going back to farmers (proposal from LTO vision for the future).
- Support for a meat excise tax alone (without tax revenues being used to financially support farmers) is limited. However, 27% of TAPP members and 22% of general livestock farmers still support the idea of a meat excise tax.
- There is a majority among TAPP members for the plan from the draft agricultural agreement for 600 million euros annually for green measures for farmers, paid from a consumer levy. That majority is just not there among the representative group of livestock farmers.
- A similar situation occurs with European price regulation measures, with 50% of TAPP members supporting this, compared to 43% of the representative group of livestock farmers.
- On the next page the results are split by target group.



# Consumer price statements

## Part I – By target group

- A. Supermarkets in the Netherlands, like in some other EU countries such as Spain, must be legally obliged to pay a minimum cost-covering price to farmers, including a surcharge for sustainability/animal welfare, with high fines for violations.
- B. The impact of meat production on the environment must be reflected in the retail price of meat.
- C. A consumer tax on meat or dairy is a better policy instrument to take into account the environmental costs of meat production than an environmental levy on farmers themselves.
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# Consumer price statements

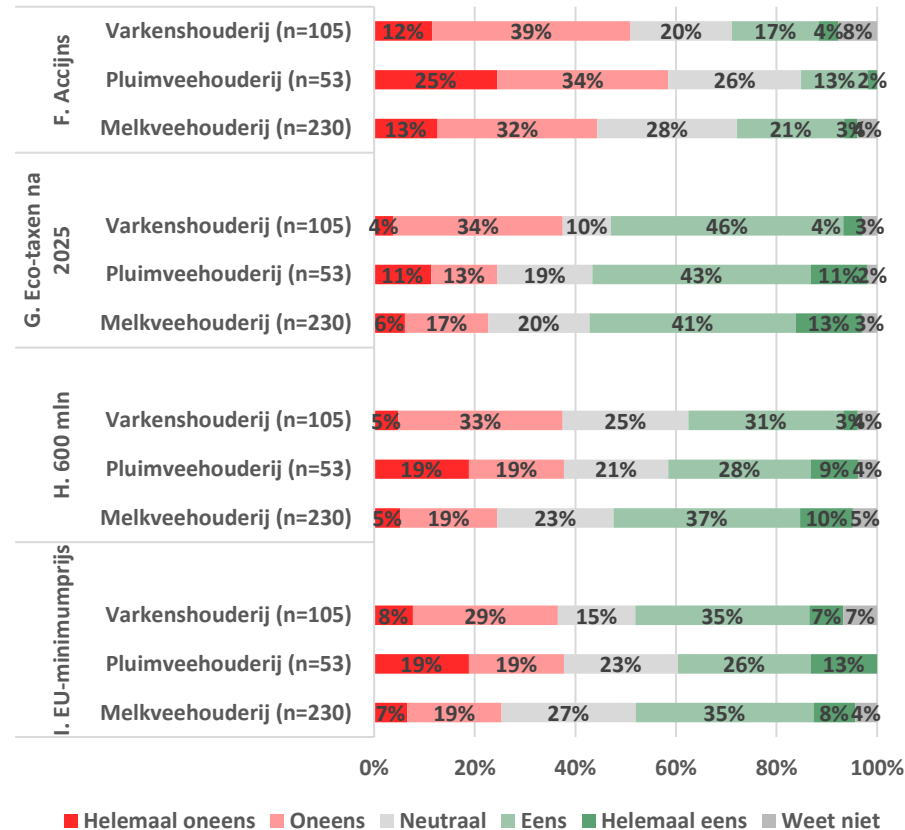
## Part II – By target group

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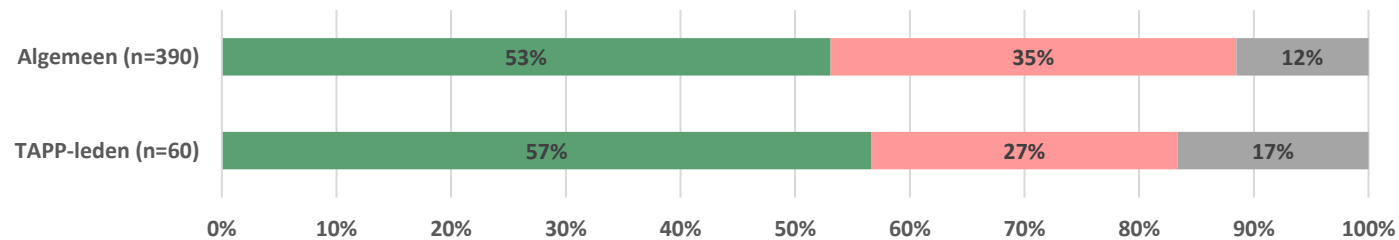


- The greatest resistance to an excise duty on meat can be seen among poultry farmers.

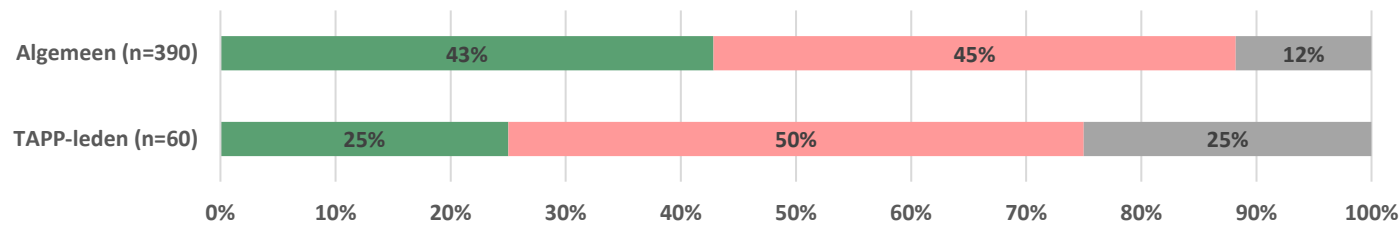


# German Animal Welfare Plan VAT Increase

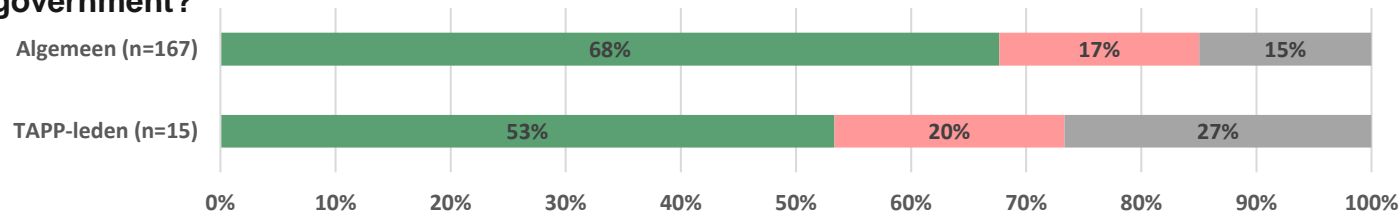
## Would you think this is a good idea for the Netherlands?



## Do you also supply products for the German market?



## Would you also like to make use of these payments made to you by the German government?

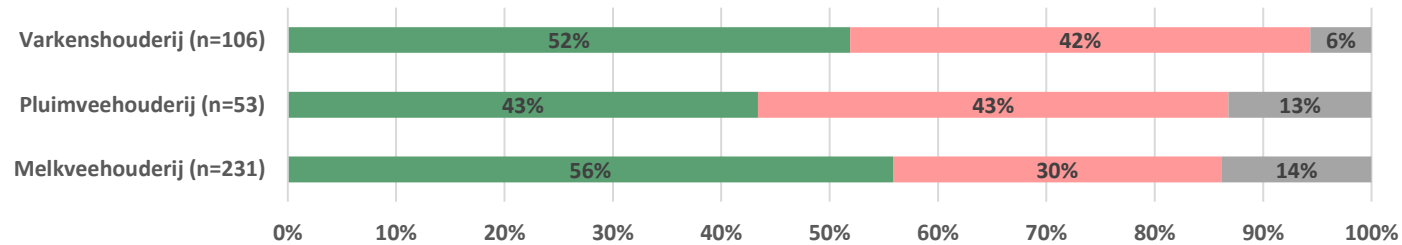


In Germany, some agricultural organisations support the animal welfare levy, whereby consumers pay a little more via a VAT increase on meat, dairy and eggs. The levy revenue is used to compensate farmers for 20 years for more animal and environmentally friendly stables, both in Germany and abroad.

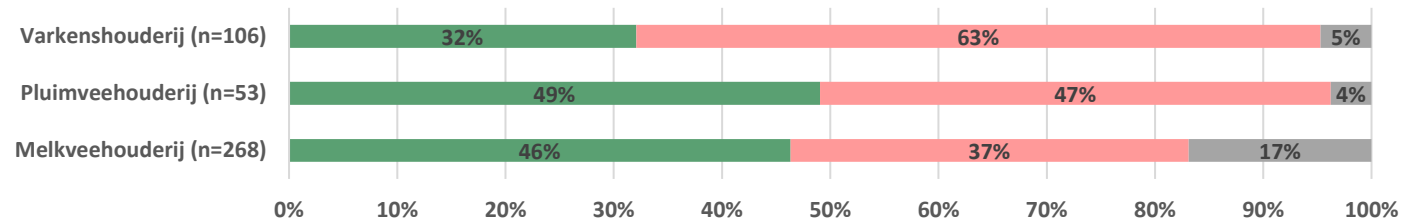
- A significant majority of livestock farmers support a tax measure similar to a German model, where consumers pay a little more through a VAT increase on meat, dairy and eggs. The proceeds are used to compensate farmers for building more animal- and environmentally friendly stables.
- It turns out that almost half of all livestock farmers export food to Germany and that most of them hope that possible future German subsidies for animal and environmentally friendly stables will also be intended for them.
- On the next page the results are split by target group.

# German Animal Welfare Plan VAT Increase

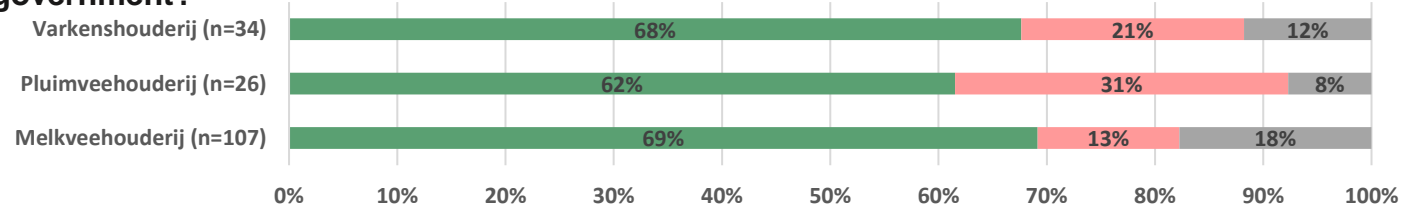
Would you think this is a good idea for the Netherlands?



Do you also supply products for the German market?



Would you also like to make use of these payments made to you by the German government?



- A majority of both pig and dairy farmers support a tax measure similar to the German model.
- Within each target group, a large majority of respondents would like to make use of these German subsidies.



# Conclusions realistic income

The research shows that a significant portion of Dutch livestock farmers advocate measures that make their income more realistic and sustainable. For example, 82% of general livestock farmers believe that supermarkets should be legally required to pay a cost-covering price.

In addition, there is broad support among livestock farmers for the idea that environmental taxes on meat and dairy should be borne by the consumer. Although there is just short of a majority, there are more proponents than opponents of increasing VAT on meat, provided that the additional income flows back to livestock farmers for environmental and animal welfare measures. In addition, 53% of livestock farmers support an eco-tax on food from 2025, with the proceeds going back to farmers, as proposed in the LTO vision for the future 2030.

## German Animal Welfare Plan

A tax measure similar to the German model, in which consumers contribute to subsidies for more animal- and environmentally friendly stables through a VAT increase on meat, dairy and eggs, can count on the support of a significant majority of livestock farmers. Almost half of them export to Germany and hope that future German subsidies will also be available to them.

## European price regulation

Furthermore, there is a majority among TAPP members for annual green measures financed by a consumer levy, although this plan just misses a majority among general livestock farmers. The idea of European price regulation measures is also supported by 50% of TAPP members and 43% of general livestock farmers.

These results highlight the need for fair compensation and better appreciation for the efforts of livestock farming.



RESULTS

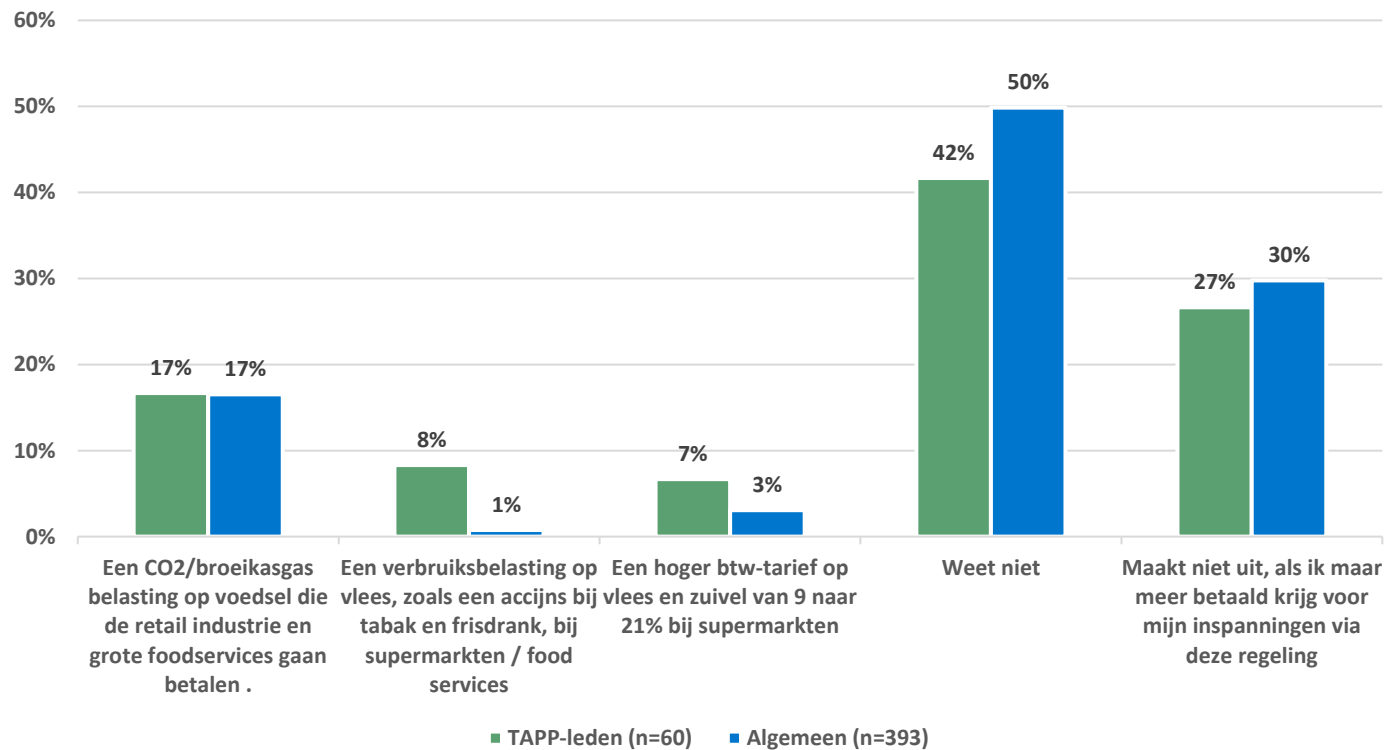
# Sustainability measures





# Eco -tax

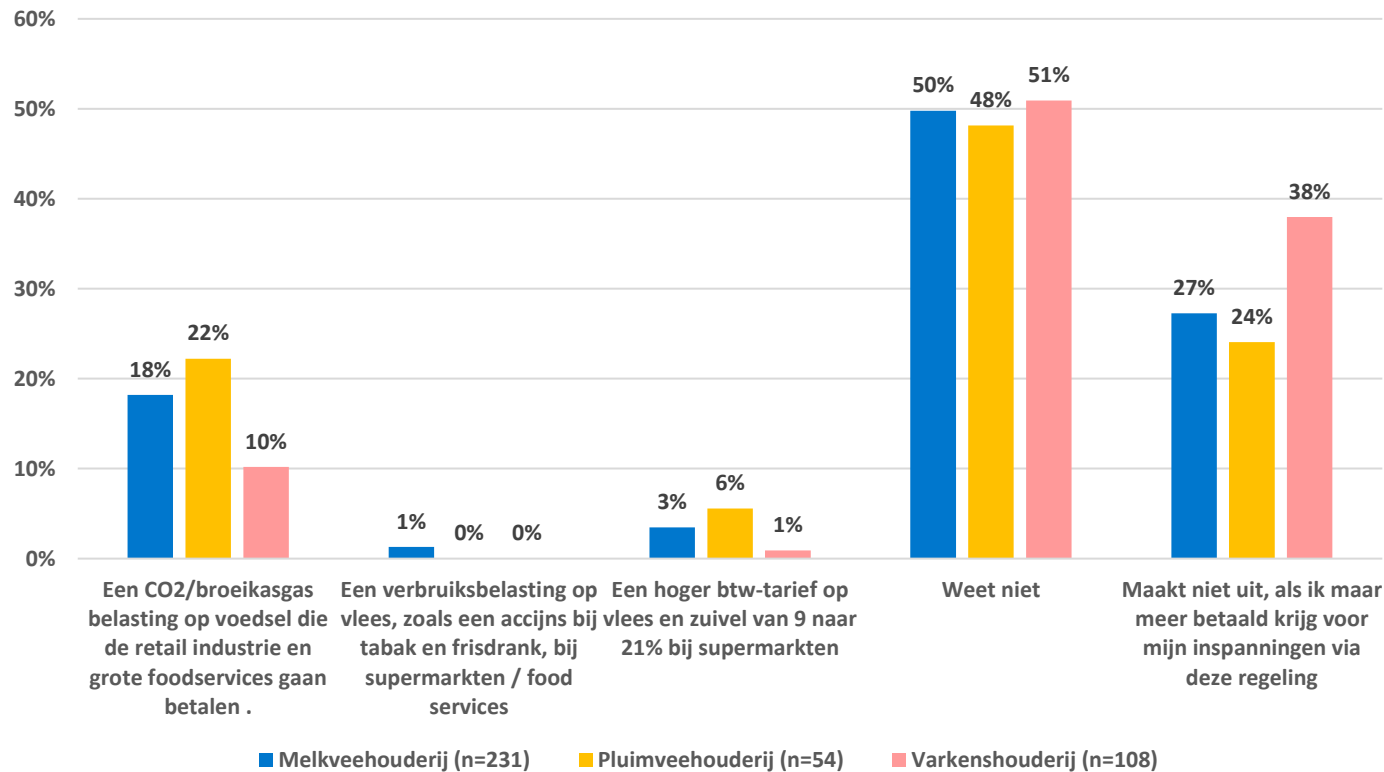
If an eco -tax on food were to be introduced, with the tax revenue being returned to livestock farmers by the government, it should preferably take the form of: (one answer)



- The draft Agricultural Agreement contained a proposal to almost double current agricultural subsidies to farmers, with an additional 600 million euros per year for nature, water and climate to be compensated through, for example, a consumer levy on food.
- Among both TAPP members and general livestock producers, 17% support a carbon/greenhouse gas tax on food, which would be paid by the retail industry and large food services.
- A significant proportion of respondents do not know what form of eco -tax they would support, with 50% of TAPP members and 42% of general livestock farmers indicating they do not know.
- 30% of general livestock farmers and 27% of TAPP members indicate that they do not care about the specific form of the tax scheme, as long as they get paid more for their efforts.
- The low support for a higher VAT rate on meat and dairy is striking, because in the question about the German animal welfare plan, it is precisely about a higher VAT rate on meat, dairy and eggs. Here, a majority of 53% was in favor.

# Eco -tax

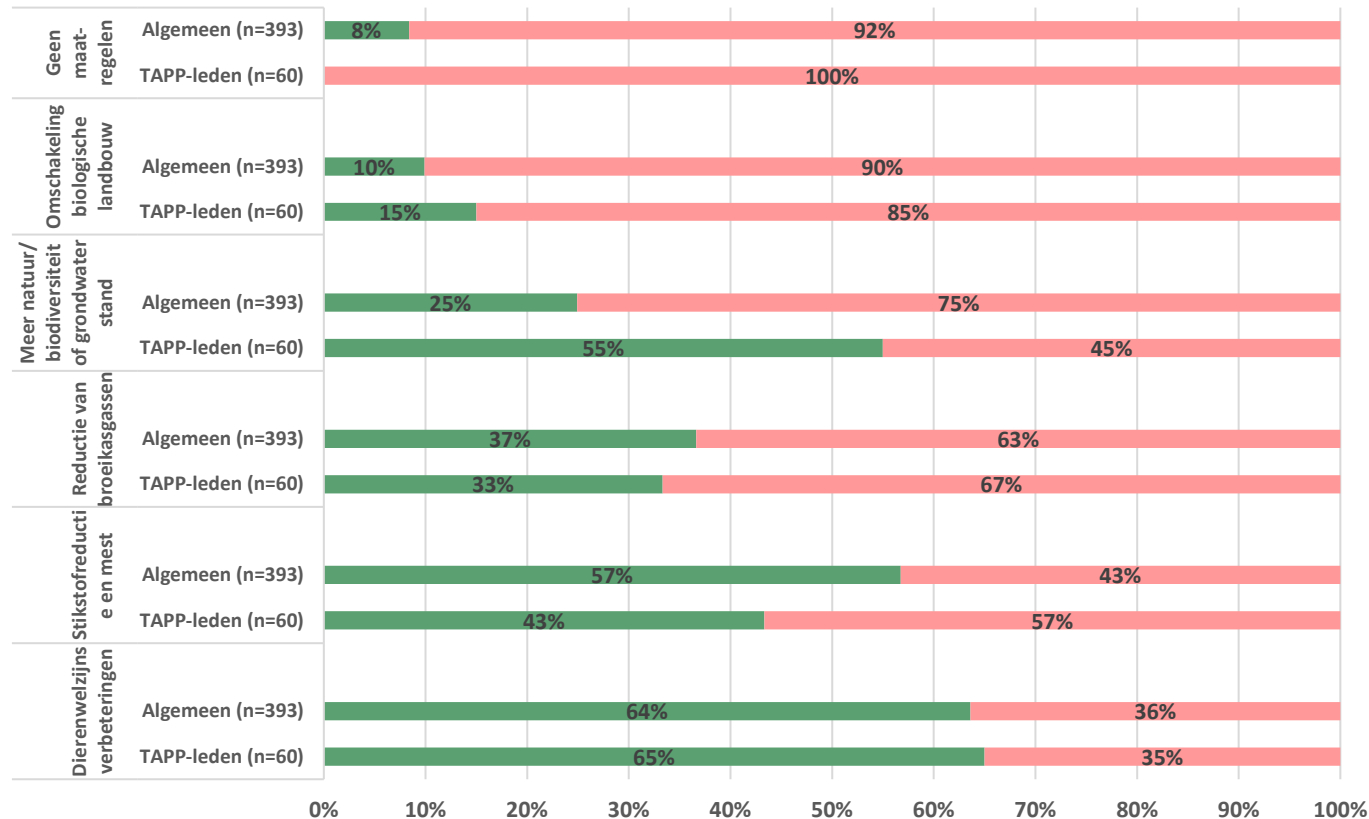
If an eco -tax on food were to be introduced, with the tax revenue being returned to livestock farmers by the government, it should preferably take the form of: (one answer)



- The draft Agricultural Agreement contained a proposal to almost double current agricultural subsidies to farmers, with an additional 600 million euros per year for nature, water and climate to be reimbursed through, for example, a consumer levy on food.
- Uncertainty is high among all groups: 50% of dairy farmers, 48% of poultry farmers and 51% of pig farmers indicate that they do not know.
- These findings highlight that there is some support for specific tax measures, but that there is also a high degree of uncertainty and flexibility among livestock farmers as long as their income position improves.
- A greenhouse gas levy on food at supermarkets and the catering industry receives the most support in this regard.

# Additional environmental and/or animal welfare measures

What additional environmental and/or animal welfare measures are you prepared to implement in the next 2 years, if compensation for these from the market or through other government policy increases?

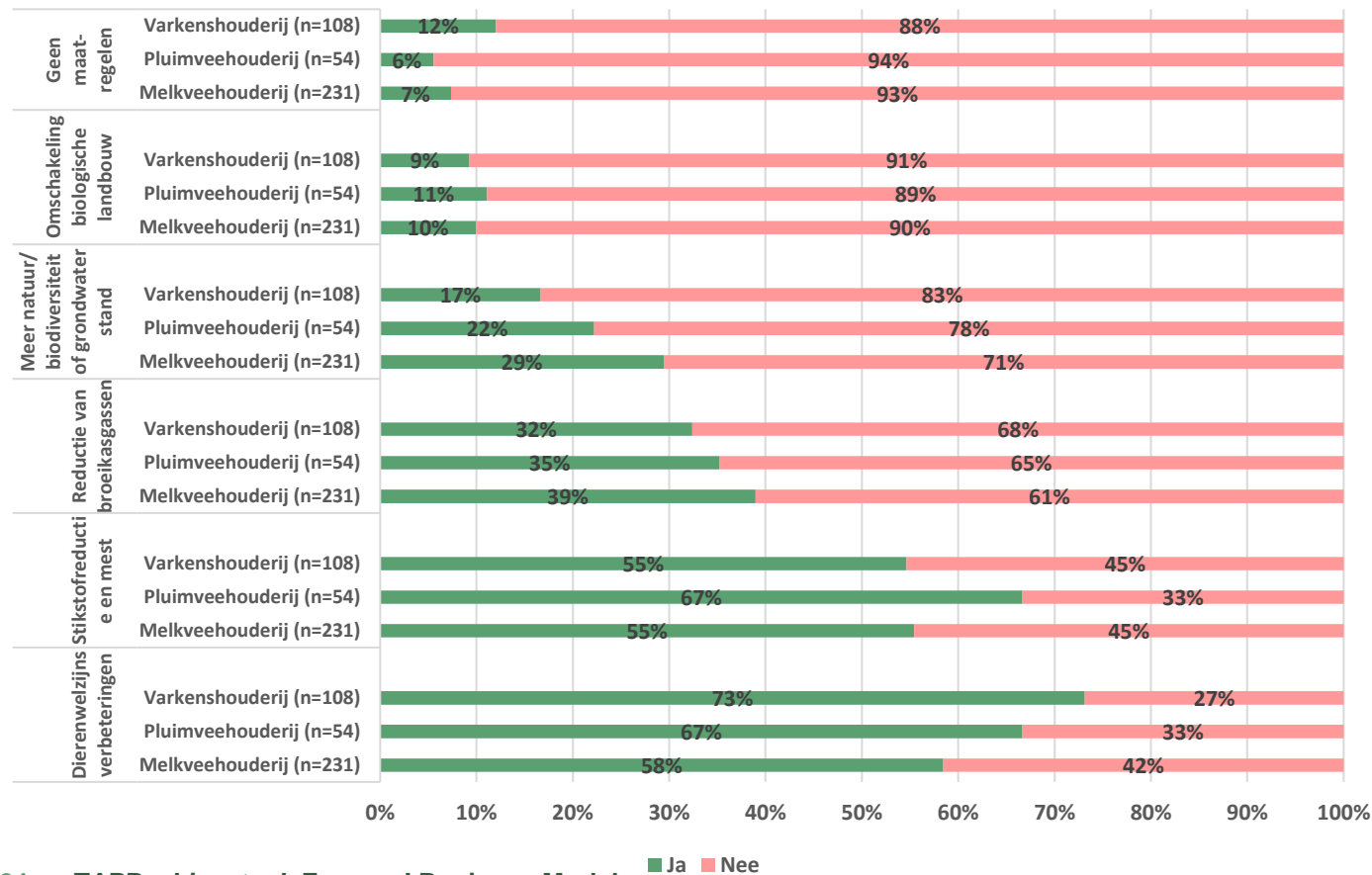


- Most livestock farmers are mainly prepared to implement animal welfare improvements and nitrogen reduction and manure measures if they receive higher compensation in return.
- Among TAPP members, the willingness to take measures regarding nature or biodiversity is greater, with 55% support. In the general group, that support is limited to a quarter. This is striking, because the new coalition of PVV, BBB, NSC and VVD recently released 500 million euros for agricultural nature measures, while livestock farmers in this survey indicate that they would rather see money for animal welfare measures.
- Only 8% of livestock farmers are not prepared to take any measures.



# Additional environmental and/or animal welfare measures

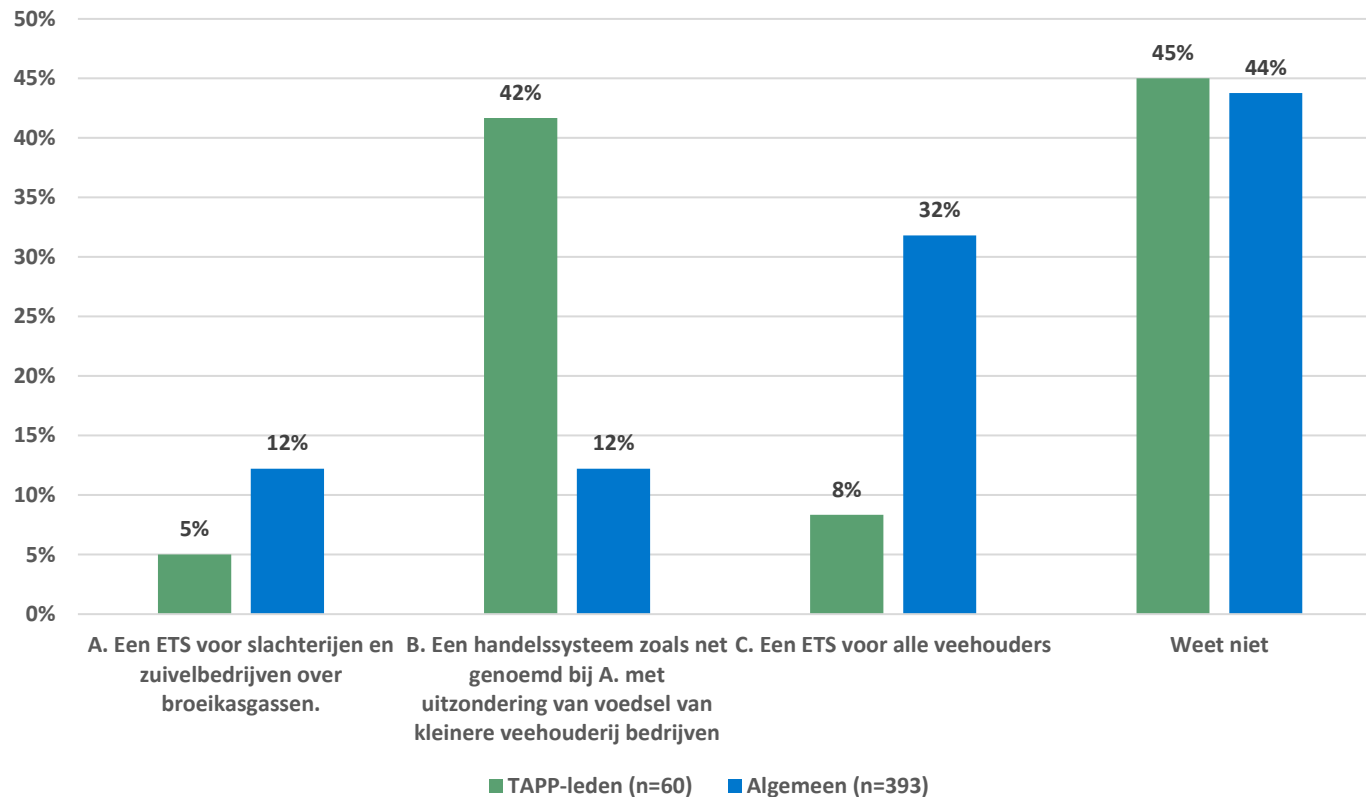
What additional environmental and/or animal welfare measures are you prepared to implement in the next 2 years, if compensation for these from the market or through other government policy increases?



- Animal welfare measures are the most popular among all groups cattle farmers , as there are additional fees for would to come from the market or through the government .

# Greenhouse Gas Emissions Trading System

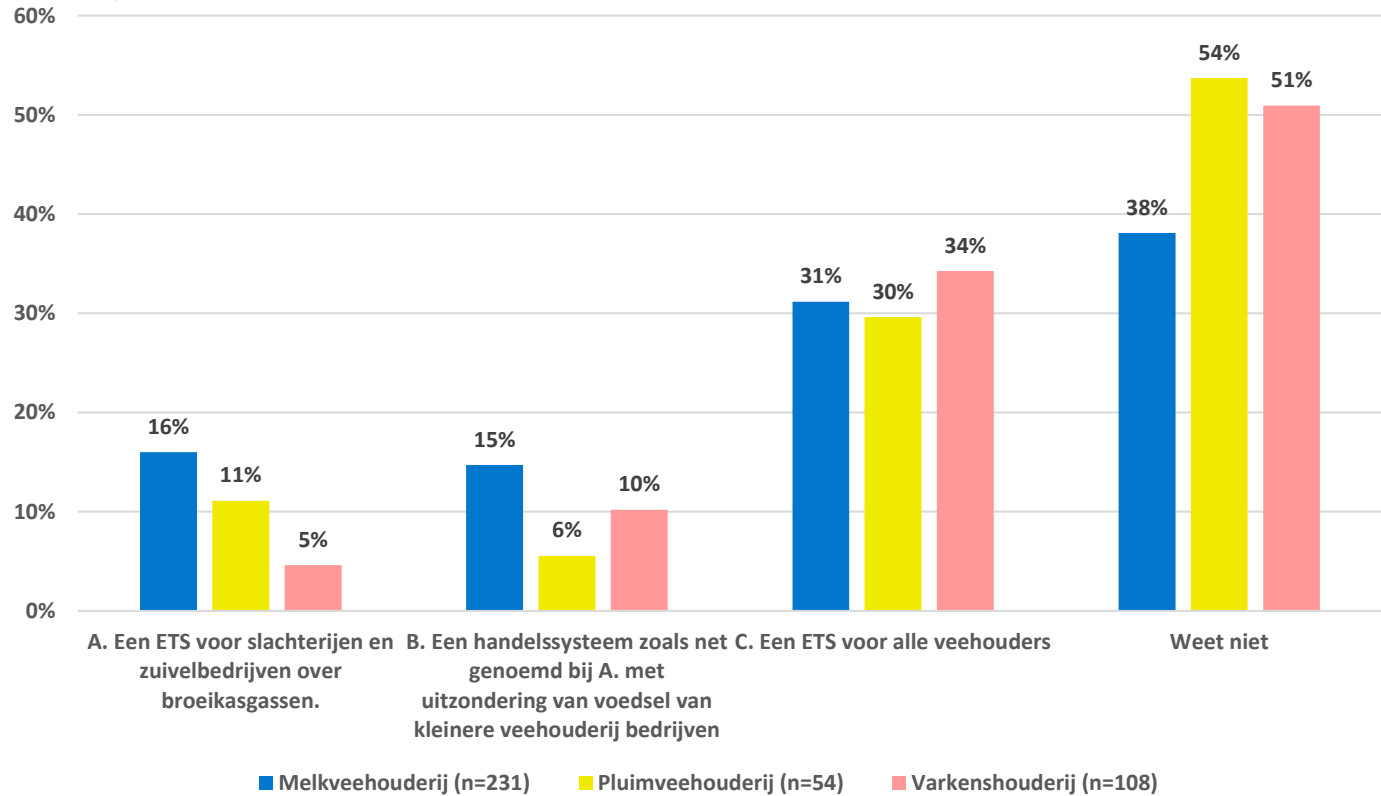
If this were to be introduced, with ETS revenues being wholly or largely returned to livestock farmers, I think it would need to take the form of:



- The EU is considering including the agro-food chain in a separate and new Emissions Trading System (ETS) for greenhouse gases around 2030. In such a system, the emission ceiling decreases annually and agro-food companies can trade emission rights among themselves (those who produce 'cleanly' can earn money this way).
- From the general group of livestock farmers, a large group indicates that this should apply to all livestock farmers.
- A significant group, 44% of livestock farmers, do not know what form the ETS should take.
- Among TAPP members there is relatively much support for an ETS system for food companies excluding food from small companies. This is also the position of the TAPP Coalition.

# Greenhouse Gas Emissions Trading System

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- Uncertainty is high among all groups, but dairy farmers are more likely to choose a specific type of ETS.
- It is striking that the option 'ETS for all livestock farmers' is chosen more often than the option 'ETS for slaughterhouses and dairies'. In the EU context, agricultural organisations for young farmers have expressed a preference for the ETS option for food companies. Then livestock farmers do not have to pay the administration and costs of an ETS or pay less.



# Refund tax revenues

## Suppose there is a consumer tax on food, what should the tax revenue be spent on? Total – Part 1

**A.** You will receive €50,000 per fully sustainable dairy farm, €300,000 per fully sustainable pig farm or €600,000 per fully sustainable poultry farm.

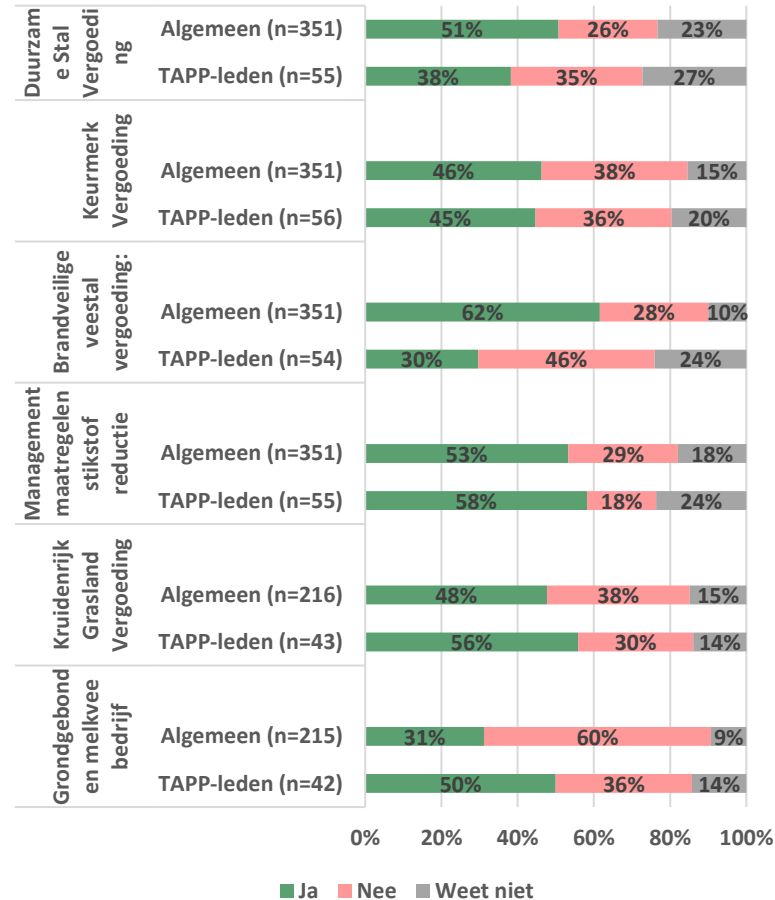
**B.** You will receive €0.01 per egg, €0.10 per broiler, €10 per meat pig, which will receive the 3-star Better Life quality mark. €0.04 per litre of milk extra for Planetproof or AH Beter.

**C.** You will receive a maximum subsidy of €20,000 per company for making livestock barns fire-safe.

**D.** You will receive compensation of €1,000 per hectare if you apply certification management measures such as low urea number for milk and extensive grazing.

**E.** You will receive a one-off payment of €300 per hectare for sowing herb-rich grassland and an annual payment of €100 per hectare of herb-rich grassland for loss of yield.

**F.** You will receive €5,000 per year if you apply less manure than the legal maximum on your own farm; you do not dispose of any manure.



- Subsidies for fire safe stables , sustainable stables , management measures have the preference of a majority of livestock farmers . Subsidies for get herb-rich grassland support from almost An majority , among TAPP members this is 56%.

# Refund tax revenues

## Suppose there is a consumer tax on food, what should the tax revenue be spent on? Total – Part 2

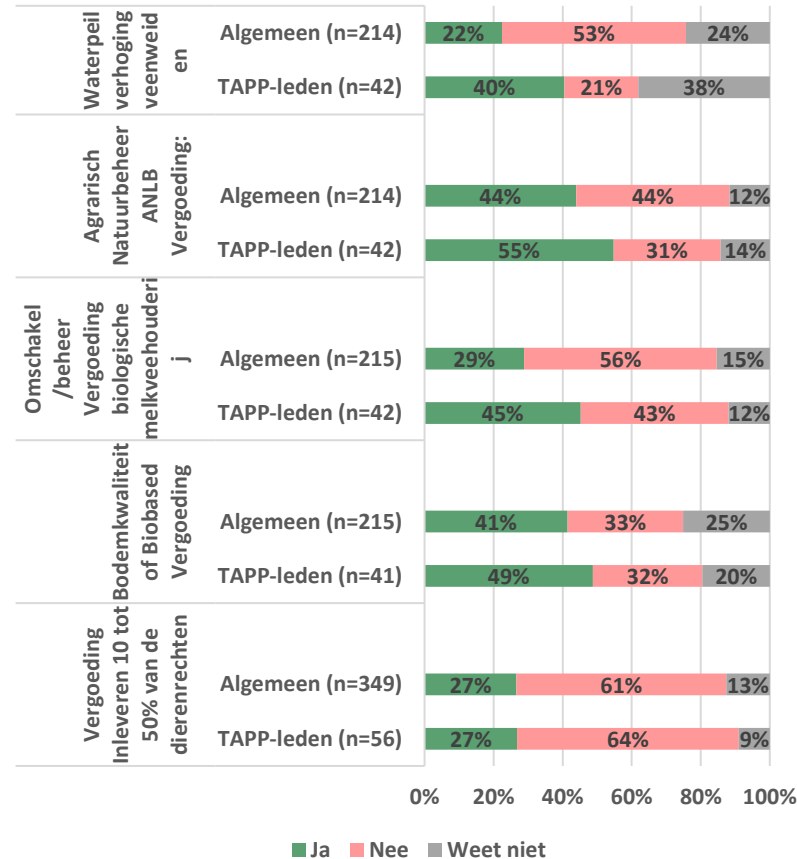
G. You will receive compensation of €1,000 per hectare per year for raising the water level.

H. You will receive €1,400 per hectare and/or Landscape elements Compensation: €10,000 per hectare for the construction of landscape elements such as hedgerows, food forests and then €2,160 per year for annual management costs.

I. You will receive €600 per hectare in conversion years and €300 per hectare for land that has already been converted.

J. You will receive €100 per ha for increasing the organic matter content in the soil or €875 per ha for Biobased building materials and CO2 sequestration and incentive premium for growers.

K. You will receive 35% above the average market price for pig, poultry or phosphate rights, which you voluntarily surrender to the government. You surrender a portion of the rights, which creates more living space for animals and you may qualify for quality mark systems that lead to a higher price.



- These findings show that the general group of livestock farmers most supports practical and directly applicable measures such as fire safety, making the barn more sustainable, landscape elements and management measures for nitrogen reduction, while there is less support for measures that may be more drastic or require specific changes in business operations, such as raising the water level and surrendering phosphate rights.
- Among pig farmers (POV), the percentage willing to surrender part of the animal rights for payment is highest at 33% and among NAJK members the lowest (9%, with LTO members in the middle (27%). Of the LTO members, 29% are interested in switching to organic farming with the above-mentioned support packages. Among NAJK members this is even 38%.
- The concept agricultural agreement included a proposal to channel 600 million euros per year back from consumer levies on food to farmers for ecosystem services (including nature and landscape management, herb-rich grassland, water level increase, conversion to organic farming and integrally sustainable stables). In the new Main Lines Agreement (PVV, BBB, NSC, VVD), 500 million euros per year has been set aside to finance this type of measure. The survey indicates that there is broad support for this.

# Refund tax revenues

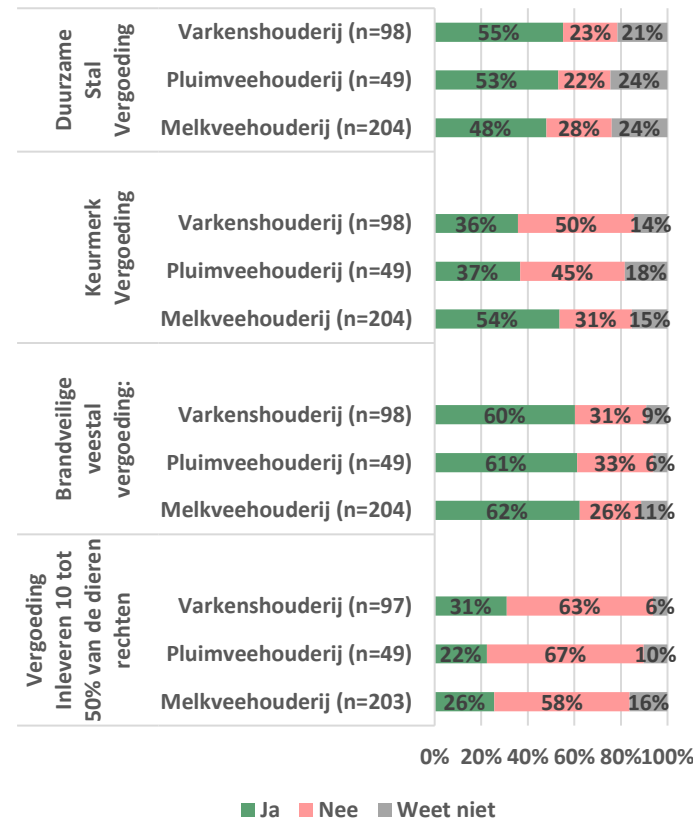
Suppose there is a consumer levy on food, what should the levy revenues be spent on? – per target group

**A.** You will receive €50,000 per fully sustainable dairy farm, €300,000 per fully sustainable pig farm or €600,000 per fully sustainable poultry farm.

**B.** You will receive €0.01 per egg, €0.10 per broiler, €10 per meat pig, which will receive the 3-star Better Life quality mark. €0.04 per litre of milk extra for Planetproof or AH Beter.

**C.** You will receive a maximum subsidy of €20,000 per company for making livestock barns fire-safe.

**F.** You will receive 35% above the average market price for pig, poultry or phosphate rights, which you voluntarily surrender to the government. You surrender a portion of the rights, which creates more living space for animals and you may qualify for quality mark systems that lead to a higher price.



- About 60% of livestock farmers would like to receive a subsidy for making stables fire-safe.
- Among dairy farmers, the quality mark compensation is appreciated by a majority of respondents.
- The voluntary surrender of a portion of animal rights in return for payment is appreciated by 27% of respondents. This percentage is highest among pig farmers.



# Conclusions sustainability measures

The draft Agricultural Agreement proposes to almost double agricultural subsidies with an additional 600 million euros per year for nature, water and climate, financed by a consumer levy on food. However, livestock farmers have different opinions about the best way to implement eco -taxes, such as consumer levies on food. Some support a CO2/greenhouse gas tax, but many livestock farmers do not know what form of eco -tax they would like. There is a lot of uncertainty, and a significant group indicates that they do not care about the form of the tax scheme, as long as their income position improves. The only variant of an eco -tax that has the support of a majority of livestock farmers is the German animal welfare model of increasing VAT on meat, dairy and eggs.

## Additional measures

The willingness to take additional environmental and animal welfare measures depends largely on the compensation that livestock farmers receive for this. Most livestock farmers are willing to take measures in the field of animal welfare, nitrogen reduction and manure management, provided that a higher compensation is provided. TAPP members are more willing to focus on nature and biodiversity.

## ETS

Regarding a new Emissions Trading System (ETS) for greenhouse gases, the EU is considering including the agro-food chain in it. Although some livestock farmers are open to this, a large group does not know what form this should take. In general, livestock farmers prefer practical and directly applicable measures, while more radical changes receive less support. Among TAPP members, there is relatively much support for an ETS variant in which slaughterhouses and dairies, rather than farmers, are included in an Emissions Trading System, and an annually decreasing ceiling with CO2 rights that can be traded among each other.



RESULTS

# Opinion of the farmer



## RESULTS

# Theses

### Opinion on environmental and price measures

a. I see similarities between CO2 taxes on energy and transport fuels and a consumer tax on meat or dairy.

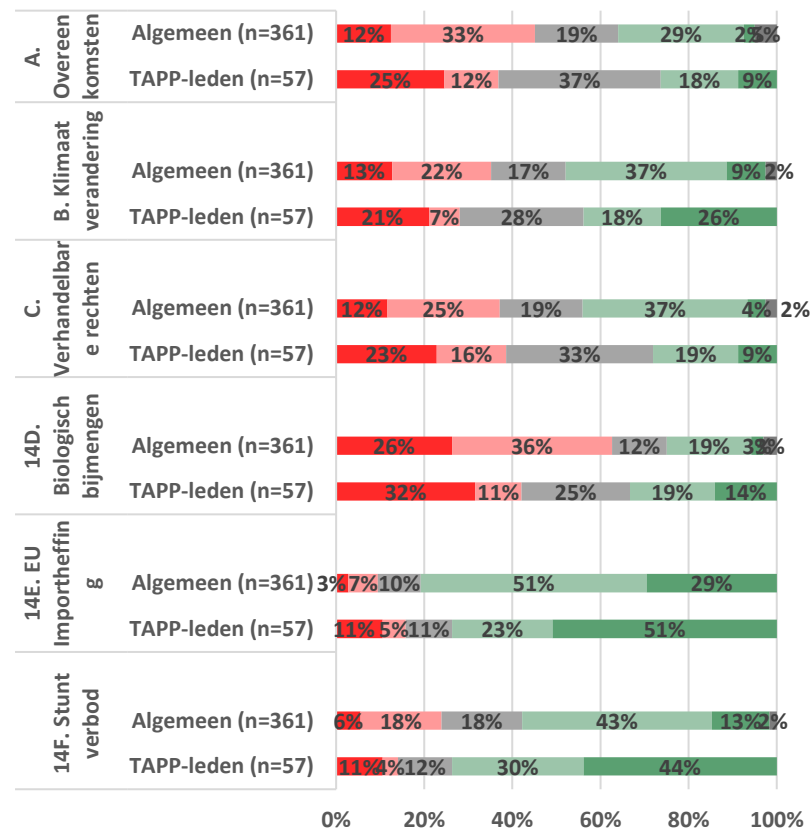
b. Climate change is a serious problem. It is already having a negative effect on milk/meat production and higher feed costs. It should not get worse.

c. The VVD proposal for tradable nitrogen rights, so that rights can be traded with a falling ceiling, whoever produces cleaner than average earns money. I think this is a good proposal.

d. Food companies in the Netherlands/EU may be required to add an increasing percentage of organic food (e.g. 10% organic milk, grain and minced meat) and to pay farmers a (mandatory) cost-covering additional price for this.

e. The EU may impose an import duty on soya, meat, eggs and dairy products if they are produced to lower environmental or animal welfare standards than in the EU itself.

f. My sector organisation may campaign for a ban on meat promotions at all supermarkets; promotions lead to a worse negotiating position for farmers to get a higher price



- A majority of livestock farmers believe that their sector organisation should be allowed to campaign for a ban on meat promotions at supermarkets, such as Jumbo, as these promotions lead to a worse negotiating position for farmers.
- In addition, a large majority of 80% of livestock farmers would like to see a European import duty on products from countries with lower environmental or animal welfare standards.
- Livestock farmers, on the other hand, see little in the mandatory mixing of organic food. The VVD proposal for tradable nitrogen rights receives slightly more support, but not a majority. Among the pig farmers of POV, that majority is there.
- There are slightly more livestock farmers who take climate change seriously because they experience adverse effects from it than there are livestock farmers who do not.
- Of the members of LTO-Nederland, 52% say they take climate change seriously and that adverse effects are already noticeable and should not get worse.



## RESULTS

# Theses

### By target group

a. I see similarities between CO2 taxes on energy and transport fuels and a consumer tax on meat or dairy.

b. Climate change is a serious problem. It is already having a negative effect on milk/meat production and higher feed costs. It should not get worse.

c. The VVD proposal for tradable nitrogen rights, so that rights can be traded with a falling ceiling, whoever produces cleaner than average earns money. I think this is a good proposal.

d. Food companies in the Netherlands/EU may be required to add an increasing percentage of organic food (e.g. 10% organic milk, grain and minced meat) and to pay farmers a (mandatory) cost-covering additional price for this.

e. The EU may impose an import duty on soya, meat, eggs and dairy products if they are produced to lower environmental or animal welfare standards than in the EU itself.

f. My sector organisation may campaign for a ban on meat promotions at all supermarkets; promotions lead to a worse negotiating position for farmers to get a higher price



- Especially at dairy farmers there is a lot support for an EU import duty on dairy , soy, meat and eggs , which with lower standards are produced than in the EU itself .
- Also at dairy farmers receive the most support for An stunt ban on meat at all supermarkets .

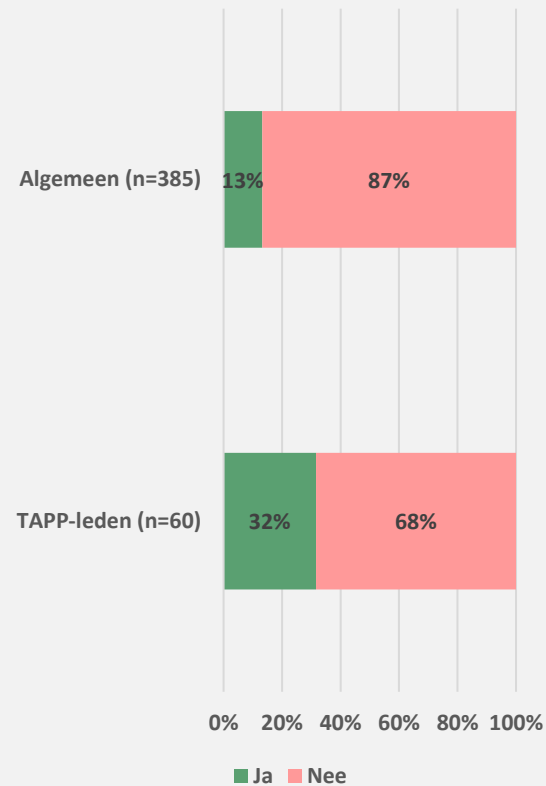
## RESULTS

# TAPP fame

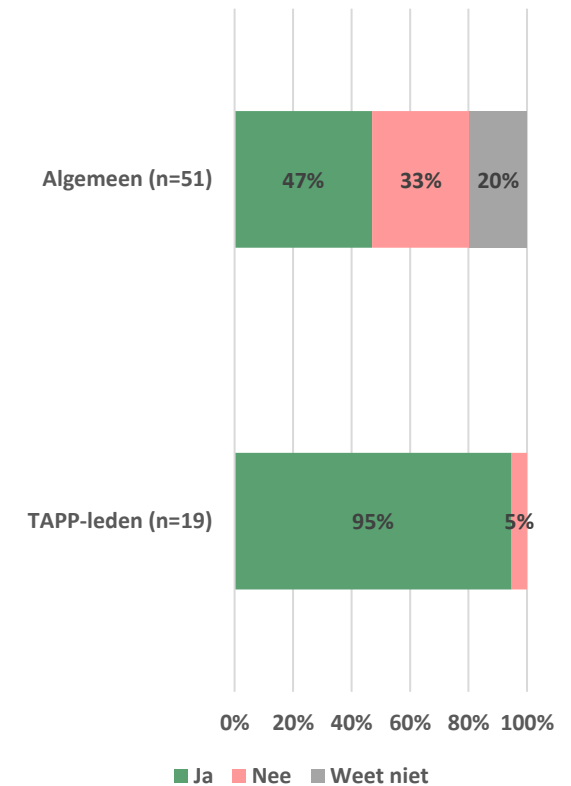
TAPP Coalition is not yet very well known among livestock farmers; only 13% of respondents have heard of it. Among livestock farmers who are members of the TAPP Coalition or an interest group affiliated with GroenBoerenPlan, familiarity is slightly higher at 32%, but there is still room for improvement there.

Respondents who are familiar with the TAPP Coalition were asked whether their interest group is allowed to collaborate with the TAPP Coalition. Among members of organizations where this is already happening, 95% say that this is allowed. Among general livestock farmers, almost half say that this is allowed.

Have you ever heard of the TAPP Coalition?



Do you think that the organization you are a member of should collaborate (more often) with TAPP Coalition?

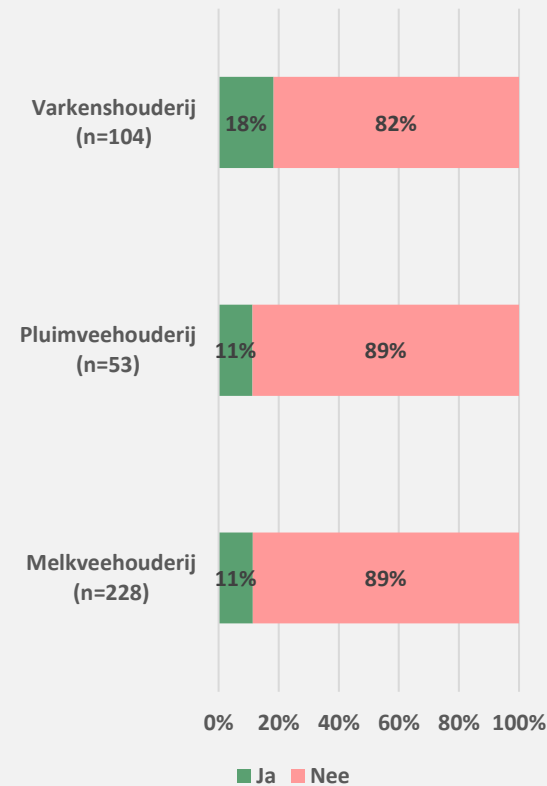


## RESULTS

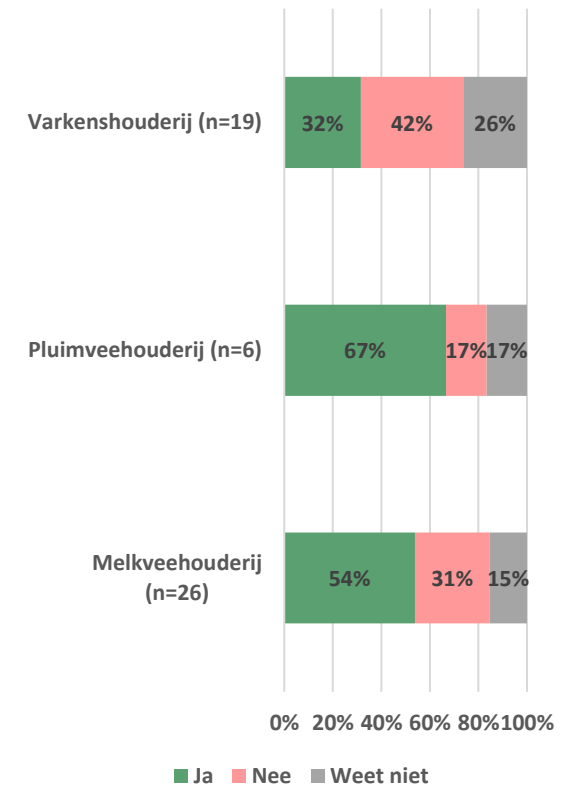
# TAPP Coalition Awareness

- The awareness of the TAPP Coalition among general livestock farmers is quite low in all target groups (13%).
- Among the livestock farmers whose organization is a partner of TAPP Coalition or is affiliated with GBP, one third is familiar with TAPP Coalition. Within that group, 95% agree that their sector organization cooperates with TAPP Coalition.
- Of the dairy farmers and poultry farmers who are familiar with TAPP Coalition (11% of the total), a majority is positive about cooperation with TAPP Coalition by their sector organization.
- There is the greatest resistance to cooperation with the TAPP Coalition among pig farmers.

Have you ever heard of the TAPP Coalition?



Do you think that the organization you are a member of should collaborate (more often) with TAPP Coalition?





# Conclusions sustainability measures

A majority of livestock farmers support the idea that their sector organisation should advocate a ban on meat at supermarkets. They believe that this stunt will lead to a worse negotiating position for farmers. In addition, there is broad support for a European import levy on products from countries with lower environmental or animal welfare standards. However, livestock farmers show little interest in the mandatory mixing of organic food.

## TAPP Coalition

The TAPP Coalition is not yet widely known; only 13% of livestock farmers have ever heard of it. Among members of organisations affiliated with the TAPP Coalition or GroenBoerenPlan (GBP), the awareness is slightly higher, at 32%.

Almost half of the general livestock farmers who are familiar with the TAPP Coalition indicate that their interest group may cooperate with this coalition. Among dairy farmers, this support is 54% and poultry farmers 67%. Among members of organizations that already cooperate with the TAPP Coalition, 95% support this cooperation.

## Resistance in the sector

However, there is significant resistance to cooperation with the TAPP Coalition among pig farmers, indicating sectoral differences in perception and acceptance of this organization.

These conclusions show that livestock farmers support pragmatic measures that strengthen their economic position, while there are mixed feelings and low awareness of the TAPP Coalition. Nevertheless, according to the results of this survey, a number of the TAPP Coalition proposals are supported by a majority. These include the German animal welfare plan with a VAT increase on meat and dairy, the proposal from the LTO vision for the future 2030 that eco-taxes on food for consumers may be introduced after 2025, with the tax revenue going back to farmers and EU import duties on meat, dairy and soy from countries with lower environmental and animal welfare requirements than in the EU.





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