

The Value of the North Sea Cluster of Excellence in Livestock

A Call to Recall Defective Regulation

Open letter to

Ursula von der Leyen, President of the European Commission

Christophe Hansen, Commissioner for Agriculture and Food

Cc:

Stéphane Séjourné, Executive Vice-President for Prosperity and Industrial Strategy

Maroš Šefčovič, Commissioner for Trade and Economic Security

Olivér Várhelyi, Commissioner for Health and Animal Welfare

Jessika Roswall, Commissioner for Environment, Water Resilience and a Competitive Circular Economy

And cc:

David Clarinval, Deputy Prime Minister and Minister of Employment, Economy and Agriculture of Belgium

Jacob Jensen, Minister for Food, Agriculture and Fisheries of Denmark

Jaimi van Essen, Minister of Agriculture, Fisheries, Food Security and Nature of Netherlands

Alois Rainer, Federal Minister for Agriculture, Food and Homeland of Germany

Martine Hansen, Minister of Agriculture, Food and Viticulture of Luxembourg

We, European researchers in agricultural economics, animal science, rural development, and environmental engineering – urge a reevaluation, reconsideration, and recalling of public policies on agrifood systems and livestock, in particular with regards to the North Sea Cluster of Excellence.

We believe the geostrategic importance and contribution of this sector to the European and national economies is not sufficiently appreciated. There continues to be a policy environment that degrades rather than advances the sector, and policy implementation that is focused on reducing raw animal numbers rather than accelerating innovation. If

the target is to make the sector more sustainable, the current regulatory condition is counterproductive and will negate the very goals it seeks to achieve.

We write not to defend the status quo, but to warn against policy paths that may feel decisive, yet end up self-defeating. We ask for two things: a clearly visible governmental acknowledgement of and commitment to the strategic importance of the sector to the competitiveness of Europe, and a decisive pivot toward innovation as the primary policy instrument so that the sector is strengthened instead of weakened further.

Many words have been spoken - too little action has followed. The sector needs unambiguous endorsement and recognition for its strategic importance, and an urgent end to regulatory strangulation.

The Starting Point:

The North Sea cluster of excellence in livestock is integrated and essential for the entire agrifood system and European food production. The cluster's breadth and depth of expertise in machinery, genetics, health, feeding, housing and transport, processing, and integrated farming systems for producing more high-quality food with less resources, and for enhanced ecosystem servicing while reducing environmental burdens, is unmatched anywhere else in the world. A disproportionately large share of innovative technologies and practices that have created progress in livestock farming worldwide over the past decades, have their roots in this North Sea Cluster.

This cluster's knowledge and innovative strength continues to be urgently needed to address the ongoing global challenge of producing enough high-quality food in enough places, and to improve environmental performance of livestock production in regions where the problem is orders of magnitude larger and standards are weaker compared to Europe.

Universities and research centers in the area, Wageningen, Copenhagen, Ghent, Göttingen, Friedrich-Loeffler Institut, Nottingham or DTU Veterinary to name only a few, are famous around the world for their research and education in livestock performance. The industry in the cluster enjoys globally undisputed innovation and technology leadership. The following is far from an exhaustive list, in machinery: Big Dutchman, Ventomatic, Moba, Stork, Meyn, Lely, GEA, Pas Reform, Nedap, Fancom, JOZ, Haarslev, SKIOLD, Roxell, Weda...; in genetics: EW-Group, Hendrix Genetics, Topigs Norsvin, Danbred, Viking, CRV...; in feed: Nutreco, DSM Firmenich, De Heus, ForFarmers, Agrifirm, BEWITAL, Hamlet, Agravis, Baywa...; in animal health: the large regional operations of MSD, Elanco, Boehringer Ingelheim, Ceva, CID Lines, Kempex, Royal GD...; in animal and dairy processing: Vion, vanDrie, Tönnies, Danish Crown, Rothkötter, Plukon, PHW, BPG, Zwanenberg, Friesland Campina, Arla, DMK, Milcobel and numerous specialty cheese and sausage producers.

Our request for reevaluation and recalling rests on three arguments.

First: weakening the livestock sector is geopolitically reckless and out-of-tune with overarching EU policies

An era has come to an end. The rules-based international system with the assumptions of open trade and economic cooperation is being replaced by transactionalism and great-power hegemony. As a collection of middle powers, the European nations were a key beneficiary of the former system, but the game has changed. In the current world, nations need leverage - strategic assets that provide bargaining power.

The North Sea cluster leadership in livestock technology - genetics, nutrition, machinery, veterinary science, circular agriculture - is of primary strategic importance. Nutritional food security is rising on every government's agenda worldwide. Nations that can offer solutions will have influence; those that cannot will depend on others.

Past policies on national and European levels amounted to a deliberate shrinking and weakening of this globally significant sector. In an era when strategic autonomy is becoming the organising principle of international relations, this is a severe strategic mistake.

The current EU-Commission has already made it clear in sufficient words that it considers the livestock sector to be a cornerstone of Europe's competitiveness and sovereignty. The principles set out in the Draghi Report on European Competitiveness, such as leveraging innovation, reducing regulatory burden and defending strategic autonomy, apply with full force to the livestock sector. But actions on the ground are missing - and national policy-making is lagging too far behind.

It is time for governments to unequivocally commit themselves to the sector or they will be out-of-tune with European priorities, out-of-tune with what the World needs, and soon out-of-tune with what their populations will have to say once they notice the damage that reckless policy has caused.

Second: weakening the sector inflicts serious economic damage

For instance, data from the Harvard Complexity Atlas show for the Netherlands, that at 17%, the livestock sector is the single largest sector for export earnings in the Dutch economy, even higher than machinery at 14% (general business is 37%). The sector's net export is three times as large as ASML. This does not count the exports of a livestock-related services sector which is equally vigorous as products. The sector sustains not only farmers but a vast ecosystem of suppliers, processors, traders, and knowledge institutions. 60% of both the 46,000 land holdings and the total value added of the agricultural complex, are livestock-related. The multiplier effects run deep into the rural economy and beyond.

The costs of the Dutch policy trajectory of recent years are already visible: stranded investments, depopulating regions, destruction of generational farming enterprises,

and erosion of the knowledge infrastructure that took decades and centuries to build. For policies that are failing to achieve their environmental objectives, these are not acceptable trade-offs.

The impact in Belgium, Denmark and Germany is no less dramatic for the sector, though milder relative to the respective national economy. The entire European sector suffers from its cluster of excellence being eroded.

Third: slowing innovation undermines global environmental progress

The environmental problems associated with intensive livestock production are real - but they are global. The North Sea region houses a small fraction of global livestock, yet operates under standards that are among the strictest in the world. Burdens per unit of output here are a fraction of those in most producing regions.

By indiscriminately reducing livestock numbers in the region, the economic foundation that drives the sector's innovation is weakened. A shrinking sector invests less in research and development. It loses the practical grounding that only a substantial industrial basis provides. It is no longer attractive for young talent to pursue a career. It cedes leadership to competitors less committed to environmental progress. The famous "*Diamond of National Advantage*" by Michael Porter (1990), begins to operate in reverse: the same factors that mutually reinforce each other on the way towards excellence, also accelerate a downward spiral towards ruin.

The irony is bitter: the focus on reducing production where it does the least environmental harm, Europe diminishes its capacity to improve conditions where the need is greatest. This is neither sensible nor successful policy - whether measured against environmental or economic targets. It amounts to symbolism at the cost of progress.

Our request

We urge the governments to:

1. Publicly and visibly acknowledge and commit to the importance and strategic value of the North Sea Cluster of excellence in livestock as a global leader in economic and environmental performance - and given that this is a rare strategic asset in a new era of global transactionalism - a commitment to the promotion of the competitiveness of this sector, aligned with EU policy direction.
2. Urgently orient policy toward innovation: set performance standards within realistic time-frames in cooperation with the sector, halt unaffordable subsidies aimed at indiscriminate reduction of animal numbers, and redirect resources toward technology development and deployment, including strengthening the world-renowned interaction between universities and companies in research and application.

The North Sea cluster has a well-earned global reputation that agricultural excellence, economic performance and environmental ambition can reinforce each other towards producing nourishing food and ecosystem protection. It has shown the path forward for decades. We can continue to lead by example through innovation and technology.

The Canadian Prime Minister Mark Carney, said in Davos: *“We do not only believe in the strengths of our values, but also in the value of our strengths”*. The North Sea livestock cluster of excellence is a cornerstone strength not only for the European people, but for all people of the World. This cluster requires and deserves support and appreciation in its efforts to make a difference to nutritional food security of the World and environmental sustainability of Earth.

We offer our expertise in support of this effort and welcome the opportunity for dialogue.

Signatories (in alphabetical order):

Europe, 31 March 2026

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