

You can find the complete research report of Berenschot on our website www.grodan.com

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Berenschot

The research "Intensive horticulture in the Netherlands and Europe" has been executed by Berenschot commissioned by Grodan.

Grodan 50 years



Part of the ROCKWOOL group

Introduction

Fifty years ago, in 1969, the practice of using stone wool for horticulture was born. The start of a success story as Grodan is still growing strong. Since then we are making an impact. Not only in the horticulture industry but in the world by providing a sustainable growing solution.

Because of this milestone we created this booklet in front of you to capture the momentum. "In Intensive horticulture in the Netherlands and Europe - A glance at the past, present and future" Berenschot give us a compact overview with the facts. During our 50th Anniversary event on October 9 we discussed these with our Northern Western European customers and a diverse panel from the sector.

1900

European horticulture suffers from the economic crisis in the 30's and 40's. As a result the demand for horticultural products decreases.

The economic crisis causes a protective policy in lots of European countries. Due to this export is being complicated.

Horticultural companies are mostly family owned companies and the cultivation work is labour intensive.

1950



Edwin Lambregts

(Senior managing consultant
at Berenschot)

Horticulture at the beginning of the 20th century was characterized by small scale, family owned businesses. The work was labour intensive and farmers had to be inventive to make ends meet.

The growth of modern retail chains in Europe spurred the development of highly efficient logistical chains and international trade.

The introduction of glass greenhouses revolutionized horticulture and gave rise to a whole new industry. Capital intensity, productivity and product quality have increased ever since.



Celebrations around the world

In 2019 we celebrated our 50th Anniversary around the world with our customers and partners.



1950

The economic growth results in an increasing demand for fresh produce in Europe. The first supermarkets pop up in Europe and this opens up new markets for growers as well as this changes the established political relations, logistic requirements and packaging.

Mechanization and knowledge development result in a rising productivity. Migrant workers are needed to do the work.

European Common Agricultural Policy (CAP): internal trade barriers are removed and trade agreements are made between European countries. Europe integrates step by step.

1970



**“The next 50 years
there will be more
change and more
innovation than the
past 500 years”**

- Adjiedj Bakas (Trendwatcher)

Adjiedj Bakas

1970

Internationalization of horticulture continues. Increased purchasing power of large food retailers. Banks are prepared to provide finance for growing horticultural companies.

Auctions merge and become bigger, as well as their members do. Large growers unite to control their sales and to develop horizontal market power.

Major investments in control of cultivation and in energy supplies.

2000

“At the end of the horizon I see the full autonomous greenhouse”

- Leo Marcelis (Head of chair group at Horticulture and Product Physiology at Wageningen University & Research)



“The future will be plant based”

- Katinka Versendaal (Food designer at Eatalier)



Time for networking!



2000

The power of the super market is without prejudice enormous, however new channels are emerging.

It is increasingly difficult to hire a suitable workforce. Due to a strong development of horticulture in Poland, the workers prefer to the job in their own country.

Enlargement of scale continues: the surface area of horticultural companies increases to more than hundred hectares.

Strict regulations on crop protection, water usage, energy and emissions from Europe.

2020



WC DECREASE % OVERNIGHT

31 May 2019

10,1 %



Week 22

This week

65.000 kg

1,6 kg/m²



26 - 31 May



Are you ready for the future?

AVG. WEEKLY HARVEST

1,6 kg/m²

65.000 kg

Variety A

31 MAY 2019

Production Crop

Last week harvest

Week 21

1,2 kg/m²

48.750 kg

Most recent harvest

Week 22

1,6 kg/m²

65.000 kg



Crop balance

Week 22

Strong /

Vegetative



2020

Consumers are increasingly demanding. Relative elements in the mix are healthy and personalized food, a conscious mind towards food waste. As technology causes transparency in the chain, the power moves more and more towards the consumer.

A shift from green-fingered growing to datadriven growing. Problems with regards to successors are a challenge for growers.

Sustainability becomes an integral concept and determines the 'license to operate'.

Enormous investments in controlling the cultivation and energy supply.