



Trends

in the Netherlands

2018

Trends
in the Netherlands
2018

Explanation of symbols

.	Data not available
*	Provisional figure
**	Revised provisional figure (but not definite)
X	Publication prohibited (confidential figure)
-	Nil
-	(Between two figures) inclusive
0 (0.0)	Less than half of unit concerned
empty cell	Not applicable
2017-2018	2017 to 2018 inclusive
2017/2018	Average for 2017 to 2018 inclusive
2017/'18	Crop year, financial year, school year, etc., beginning in 2017 and ending in 2018
2015/'16-2017/'18	Crop year, financial year, etc., 2014/'15 to 2016/'17 inclusive

Due to rounding, some totals may not correspond to the sum of the separate figures.

Colofon

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Welkom

op de

school

er Durk

Sara
sanur

Woensdag
tafelschetsen
maken!

7

19

1. Society

Trends

Teachers in primary education

In 2017, there were 154 thousand teachers working at Dutch primary schools. These were mostly women. The majority of male teachers are over the age of 55. Many teachers experience heavy workloads. Moreover, teachers – particularly older ones – earn less per hour than people of the same age and with the same education level who are employed outside education. Teachers are relatively unlikely to leave the profession. Most will continue to be employed in education.

The majority of teachers are female. Their share has increased in recent years, to over 80 percent in 2017.

Ageing

Aside from the major feminisation of primary education, ageing is another trend. Over the past five years, the share of teachers aged 55 and up has doubled to reach roughly 20 percent

in 2017. The share of over-55s is particularly high among male teachers, exceeding 35 percent in 2017. Among their female colleagues, this is 18 percent. The percentage share of teachers in the age group 45 to 54 years has declined among both sexes. Especially among women, the share of teachers under the age of 25 has dropped, to less than 5 percent in 2017. Nevertheless, this share is still higher than among male teachers (3.6 percent).

Fewer full-time teachers

Of the male teaching force working in primary education in 2017, 64 percent were full-time employees. This share is higher than among female teachers (26 percent). Among both sexes, the share of full-time teachers has declined since 2003. At the same time, the share working in large part-time teaching jobs for 20 to 35 hours per week has increased while the share in small part-time jobs has remained

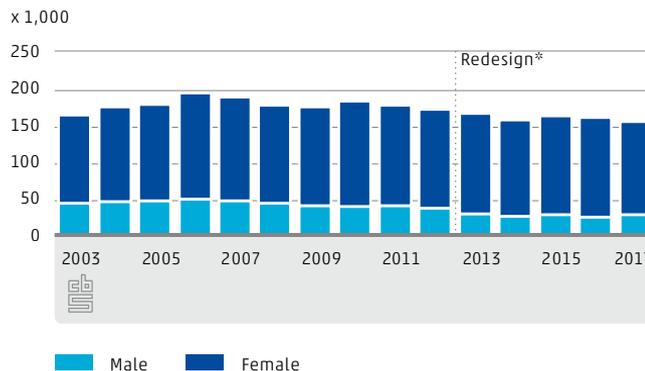
almost stable. Women account for all of the increase in large part-time jobs among primary school staff.

Lower hourly wages

In 2015, teachers in primary education were earning an average gross salary of 26 euros per hour. According to economic research by SEO Amsterdam Economics (the Economics Faculty of the University of Amsterdam), this means their gross hourly earnings were 4 euros (14 percent) lower than outside education for employees of the same age, with the same education level and the same number of working hours. The pay gap is largest (35 percent) for full-time, male teachers aged 50 and over. As for older female teachers in full-time employment, they were earning roughly 26 percent less than their peers outside education.

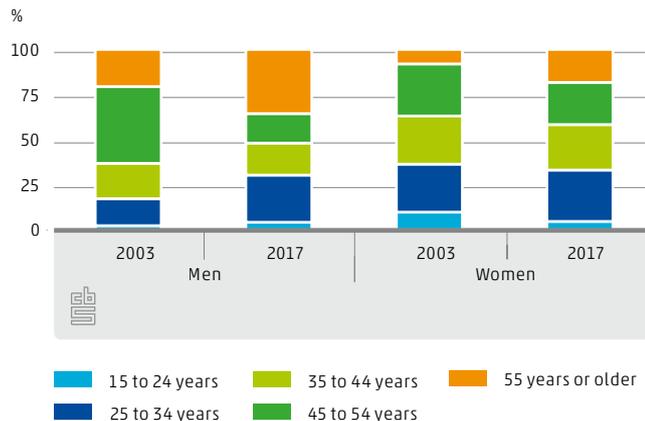
The pay gaps are smaller in the younger age groups. For instance, full-time female primary teachers under the age of 35 are earning 3 percent less than other full-time female employees. Gross hourly wages for female part-time teachers in this age group are

1.1 Teachers in primary education

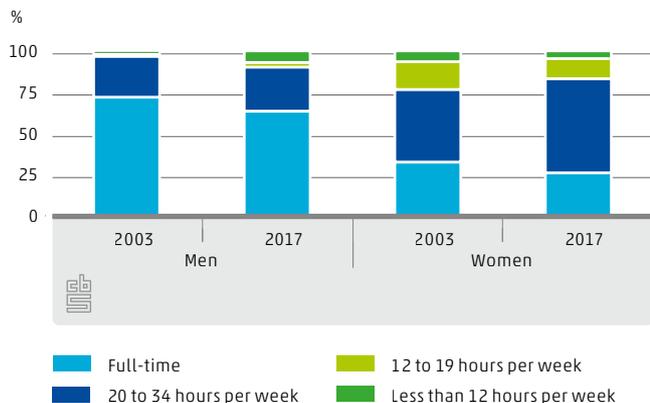


* Due to redesigning of this research, there is a break between the figures over 2012 and 2013.

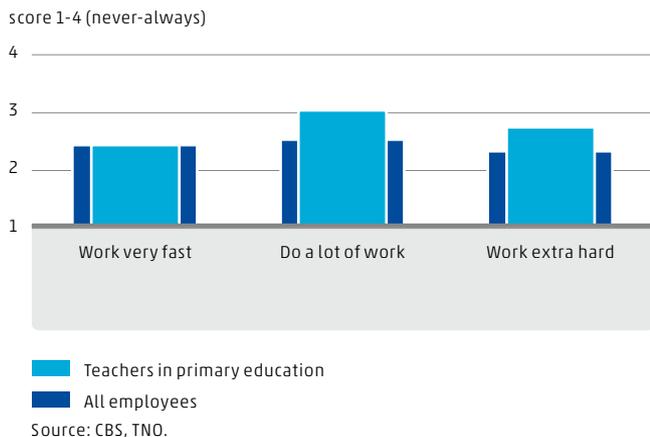
1.2 Age distribution of teachers in primary education



1.3 Working hours of teachers in primary education



1.4 Experienced workload, 2017



comparable with those for part-time employees outside education.

High workload and absenteeism

Together with chefs, doctors, managers and lawyers, teachers top the list of employees with the highest work pressure, as indicated by the working conditions survey conducted by CBS and TNO. Work pressure here means that people find they have to work very fast, very long hours or extra hard. More often than average, primary school teachers indicate they need to work very long hours and extra hard; they score the highest on these aspects among all occupational groups. Apart from a high workload, primary teachers often consider their work emotionally demanding. They are also much less likely to say they have autonomy in their work than the average employee. This is mainly related to the fact that they have less flexibility in taking up leave.

The level of sickness absence is relatively high among primary school teachers. In 2017, primary teachers had an absence rate of 6 percent, against an average of around 4 percent across all sectors. Primary teachers

have higher absence rates than teachers in secondary and higher education.

Moving between occupations mainly within the sector

Every year, a number of primary teachers decide to change profession. At the same time, there are people in other professions who choose primary teaching as a career. Around 5 percent of all primary teachers find alternative careers every year. However, they usually stick to education and choose a similar occupation in the field, e.g. teacher in secondary education or teaching assistant. Part of them switch to health care, retail trade or secretarial services. Every year, around 7 percent of primary school teachers joining the profession are career changers from other occupations, often within the education sector, e.g. secondary teachers and educationalists.

Fewer students in training to teach primary (PABO)

The number of potential new teachers has dropped compared to school year 2003/'04. For example, there were still 9.7 thousand first-year students of primary teacher education

1.5 First-year students in PABO primary teacher education

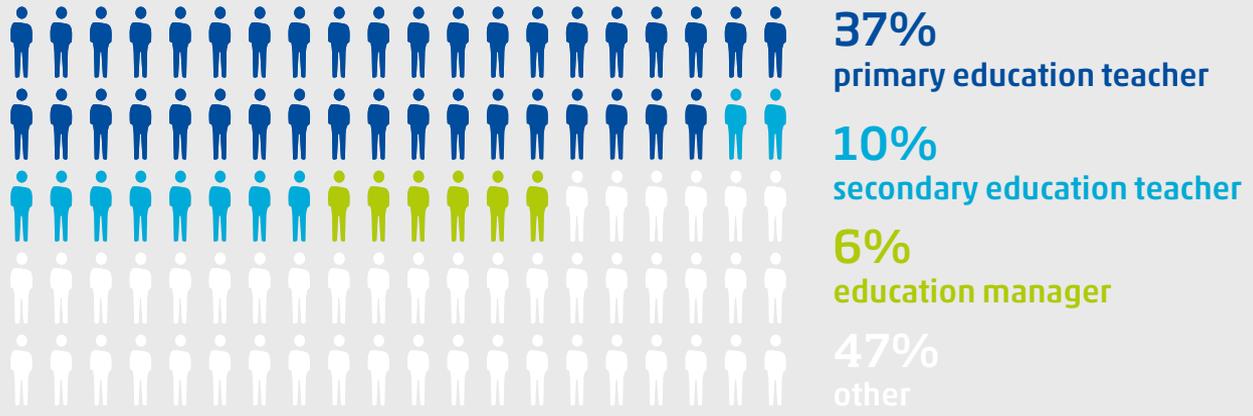


(PABO) at universities of applied sciences (HBO) in 2003/'04, but this number had more than halved to 4.5 thousand students in 2017/'18. This number has started to go up again slightly over the past few years.

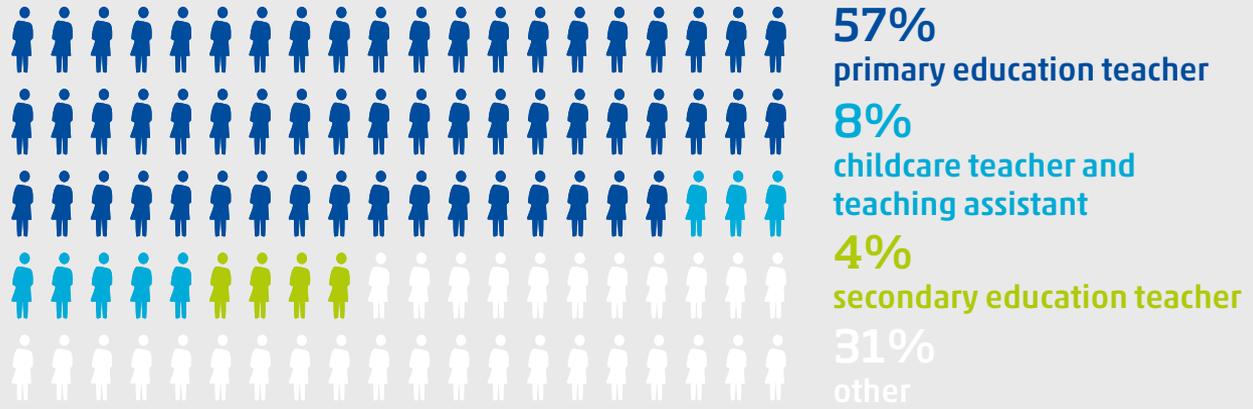
In recent years, PABO teacher education has been affected by tighter admission requirements. Newly incoming students are assessed for their knowledge of geography, history and nature and technology. These changes are aimed at improving the quality of

Occupations of people with PABO teacher education, '14/'15

Men



Women



training, but also have consequences for the number of entering first-year students. Another factor is the introduction of a new student loan system. This initially led to an increase in the number of first-year students in 2013/'14 and 2014/'15, followed by a sharp drop in 2015/'16.

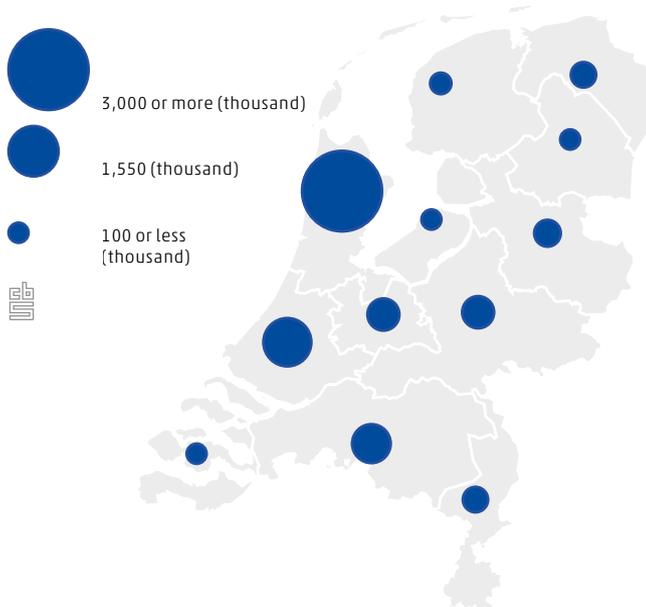
A job outside primary education

Not everyone with a degree in primary teacher training will become a classroom teacher.

Among male PABO graduates, 6 in 10 are engaged in a profession other than teaching.

Some end up as teachers in secondary education (6 percent) while others become managers (10 percent). Women with a PABO diploma who do not work as primary school teachers are relatively often childcare group leaders, teaching assistants (9 percent) or teachers in secondary education (4 percent).

1.6 Concert visits, 2016*



Figures

Culture

In 2016, 8.7 million people attended classical and pop concerts throughout the country. This was 3 percent more than in 2015. Other performances drew 9.5 million visitors, 2 percent down on the previous year. Music was well represented in the range of performing arts productions in 2016. Of all programmed performances, well over one-third were concerts. Attendance at performances, concerts in particular, was largely concentrated in the province of Noord-Holland, more specifically in Amsterdam. The capital city of Amsterdam has a number of large event halls. Combined, they drew 17.3 percent of all concertgoers in the Netherlands in 2016.

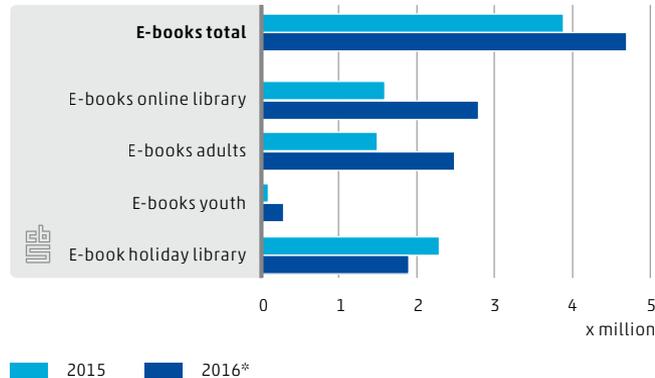
The number of people working in the performing arts industry has increased again in recent years, after a decline between 2011 and 2013 following public budget cuts. In 2016, 21.7 thousand people were working in performing arts, 8 percent more than in 2013. In the period 2009–2015, there were mainly more volunteers and interns working at theatres and music venues. Their numbers stabilised in 2016, but the number of hired workers (self-employed and payroll professionals) increased.

On the other hand, the number of employed people saw a 12 percent decline between 2013 and 2016. Nevertheless, this group still accounted for 71 percent of the hours worked in 2016.

1.7 Employment in performing arts



1.8 Loaned library e-books



Source: Dutch National Library (KB), CBS.

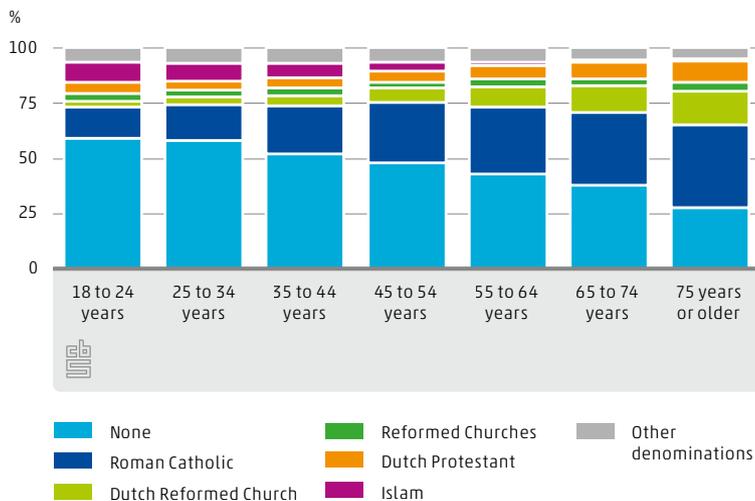
In 2016, there were 694 museums in the Netherlands, drawing altogether 34.4 million visitors. This represents a 9 percent increase on 2015. The number of foreign visitors rose in particular. Museums in Noord-Holland province are the most popular among Dutch and foreign visitors alike. Noord-Holland is also the province with the highest number of museums: 126 in 2016. In 2016, one-quarter of all museum visits were made with a Museum Card. Dutch museums had nearly 10 thousand people on the payroll in 2016. In addition, they often used volunteers (nearly 35 thousand) and freelancers (5 thousand).

Dutch public libraries lent altogether 2.8 million e-books through an online library system in 2016. This is 74 percent more e-books than in the previous year. Including the free online library for the summer holidays ('Vakantiebib'), total e-book lending came to 4.7 million items. E-books form a minor but increasing proportion of total library loans. Physical book loans have decreased by more than half since the late 1980s to a total of 68.5 million books in 2016.

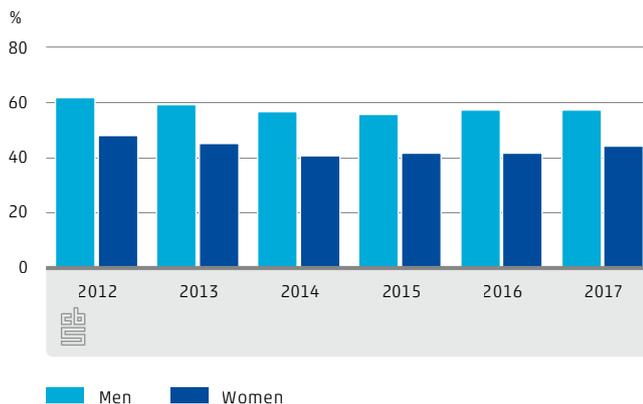
In 2017, 4 in 10 young people (18 to 24 years) indicated they belonged to a religious denomination. This is a much lower share than among the older part of the population. Most believers say they are Roman Catholics. Almost 5 percent indicate they practise the Islamic faith. These are mostly people under the age of 55.

Men are more interested in politics than women. In 2017, 58 percent of men showed an interest in politics, compared to 44 percent of women. Interest in politics declined slightly between 2012 and 2014, but remained stable afterwards.

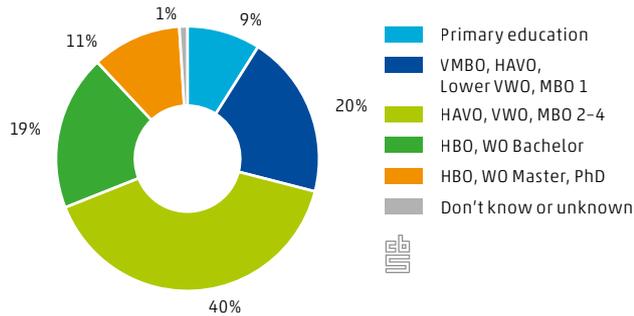
1.9 Religious denominations, 2017



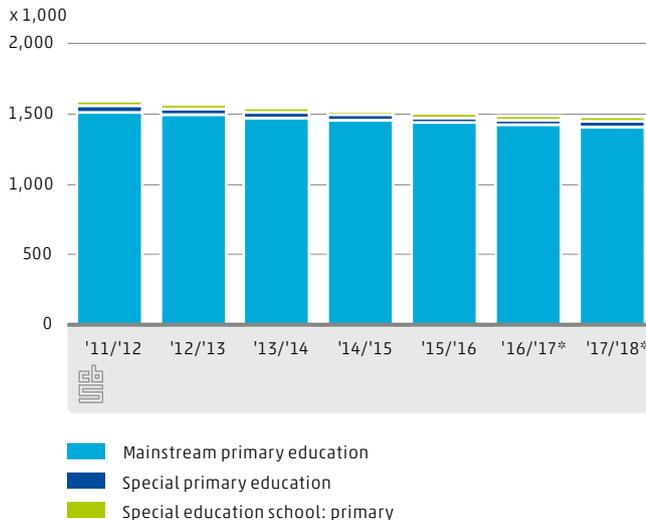
1.10 Interest in politics



1.11 Educational attainment among population aged 15 to 74 years



1.12 Pupils in primary education



Education

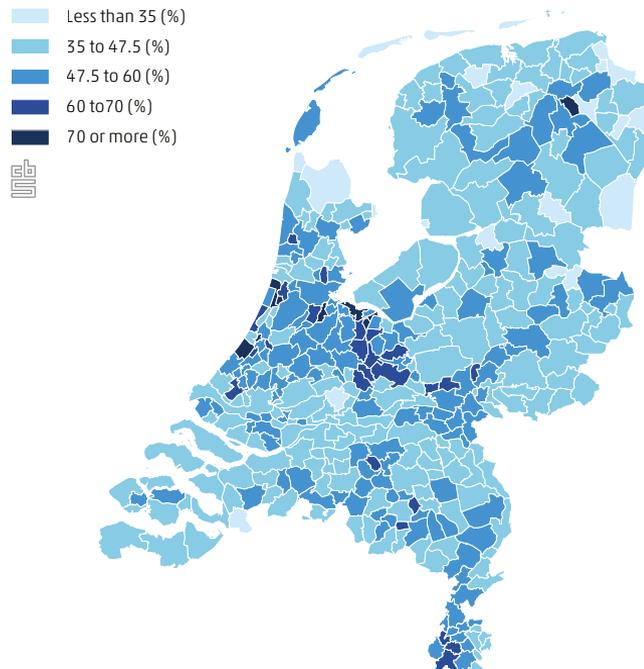
Almost 40 percent of the Dutch population aged 15 to 74 years have secondary education diplomas at vocational (MBO 2, 3 or 4), senior general (HAVO) or pre-university (VWO) level. This group has constituted the majority for years and its size has been relatively stable throughout. At the same time, the share of people who have completed higher (HBO) or university (WO) education has increased and came to 30 percent in 2017. In addition, there is another group – 29 percent – whose highest attained level of education is primary, prevocational secondary (VMBO), the lower years of senior general (HAVO) or pre-university (VWO) education, or lower level secondary vocational education (MBO-1).

In academic year 2017/'18, nearly 1.5 million pupils were attending a (special-needs) primary school or a special education school at primary level. Their number has decreased in recent years and this trend is expected to continue, based on the population forecast by Statistics Netherlands. Especially in mainstream primary education, the number of pupils has declined,

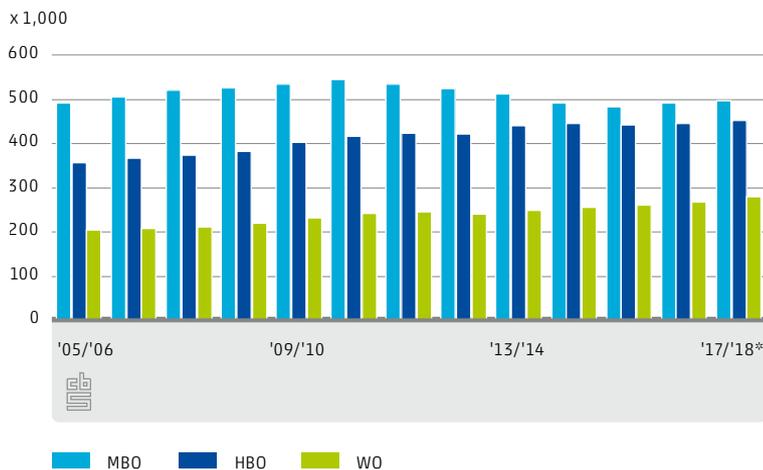
while the number of children attending a (special-needs) primary school or special education at primary level seems to be stabilising (64 thousand in 2017/'18).

In the academic year 2017/'18, there were nearly 956 thousand secondary students (excluding practical education and special education schools at secondary level). In Year 3 of secondary education, 47.5 percent of the student population were in senior general (HAVO) or pre-university (VWO) education. In the Randstad conurbation and in/around the university cities, there are higher than average shares of students at HAVO/VWO level. In Bloemendaal, Heemstede and Oegstgeest, over 80 percent of secondary students are in HAVO or VWO. The share of HAVO/VWO students is below 35 percent in some northern municipalities.

1.13 Year 3 students in HAVO/VWO schools, 2017/'18



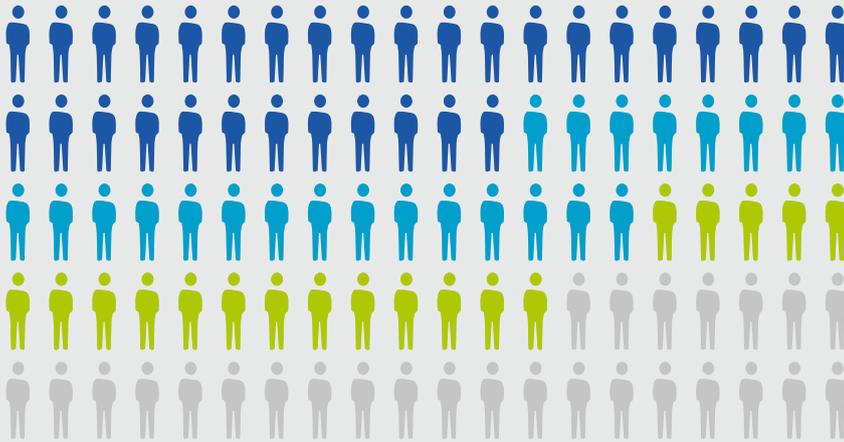
1.14 Enrolments in MBO and higher education



The number of senior secondary vocational education (MBO) students shows an up-and-down trend. After some years of decline, the number of MBO students was up slightly in academic year 2016/'17. The upward trend continued in the academic year 2017/'18, among both the male and the female student population. Male students constitute the majority in MBO. Furthermore, the share of students in the school-based pathway ('bol') increased in particular. In higher education, the increase has prevailed for a much longer time. Female students are in the majority in higher vocational (HBO) and university (WO) education.

Vocational and university enrolments by women are most often related to health care and welfare. Such programmes are among the top 3 for female students at MBO, HBO as well as university level. For example, nursing and obstetrics, social work and medicine. Among the male students, the top 3 comprises technology, industrial and civil engineering. Courses in law, administration and trade are popular among both male and female students. This is also true for studies related to provision of services. At HBO level, teacher education ranks in the

Male MBO students

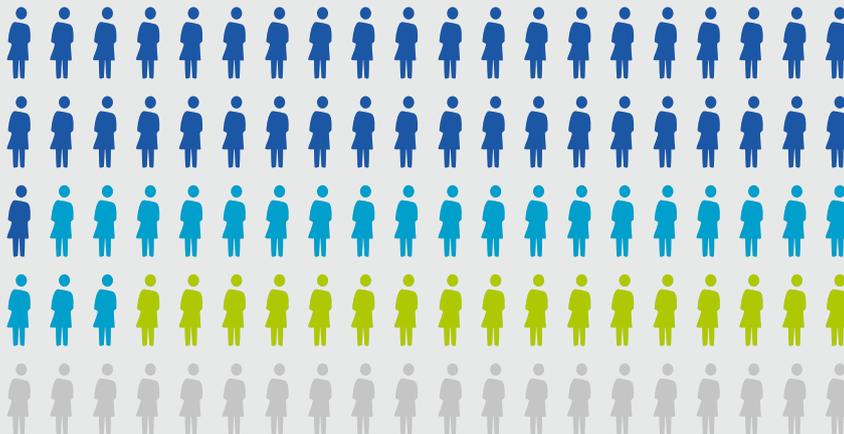


32%
technology, manufacturing and
civil engineering

23%
service provision

18%
law, administration, trade,
business services

Female MBO students

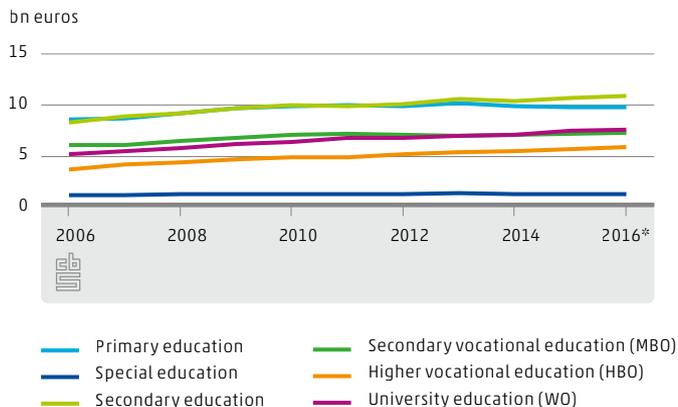


41%
healthcare and welfare

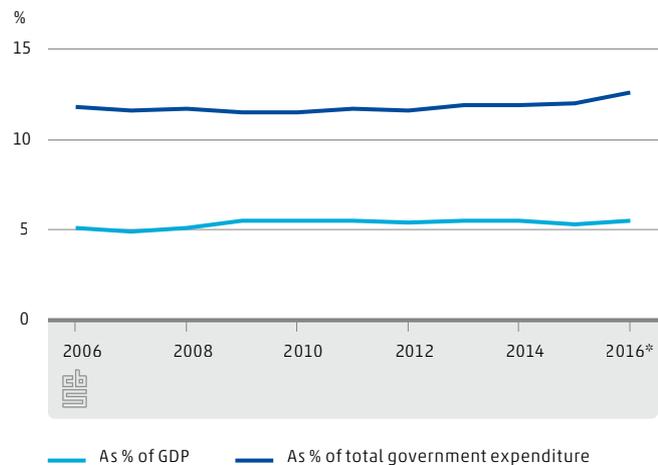
22%
service provision

17%
law, administration, trade,
business services

1.15 Education expenditure, by type of education



1.16 Government expenditure on education



top 3 among female but not among male students. Female university enrolments are most often in the field of journalism, behaviour and society, including psychology and sociology.

In 2016, total expenditure on education came to 42.9 billion euros. The highest proportions were spent on primary and secondary education. These education sectors also have the highest numbers of students. In secondary education, total expenditure went up by 31 percent to 10.9 billion euros in 2016 over a period of ten years. In primary education, total expenditure grew by 14 percent to 9.8 billion euros in 2016 over the same period.

Government expenditure on education has risen in recent years and came to 38.7 billion euros in 2016. The share of education expenditure in GDP is fairly stable at around 5.3 percent. In 2016, education occupied a 12.6 percent share in total government expenditure. This is slightly higher than in previous years.

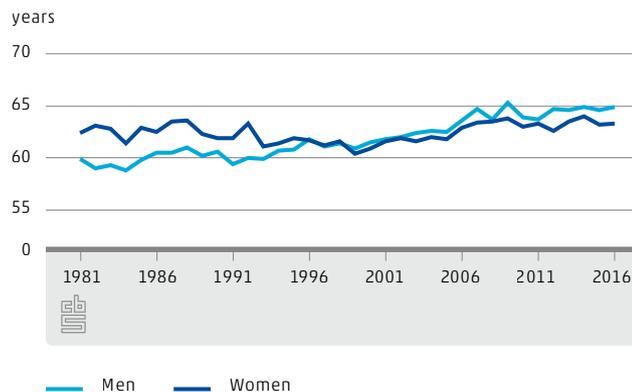
Health and care

Healthy life expectancy means the average number of years that a person is expected to live in good self-perceived health, assuming that future health and mortality risks remain unchanged. As of the 1980s, healthy life expectancy from birth has increased among men in particular: from an average 60 years in 1981 to 65 years in 2016. Among women, healthy life expectancy has fluctuated around 62 years over the same period.

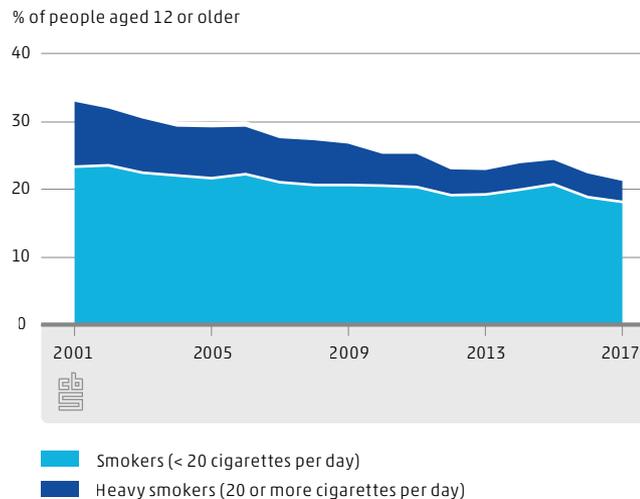
Smoking rates among the population aged 12 years or older have declined since 2001. In 2017, 22 percent were smoking versus 33 percent in 2001. The percentage of heavy smokers, i.e. people who smoke more than 20 cigarettes per day, has fallen as well, namely from 10 to 3 percent.

Adults with a body mass index (BMI) between 25 and 30 (kg/m²) are considered overweight, while a BMI of 30 kg/m² or higher indicates obesity. Thresholds for overweight and obesity are different for minors (under 18), depending on age and sex. Obesity rates have been on the

1.17 Healthy life expectancy (at birth)

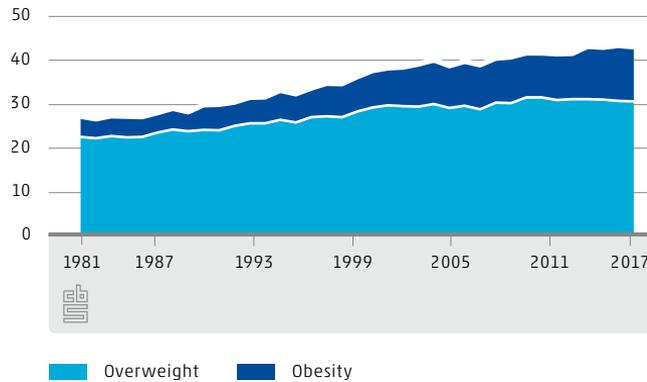


1.18 Smokers



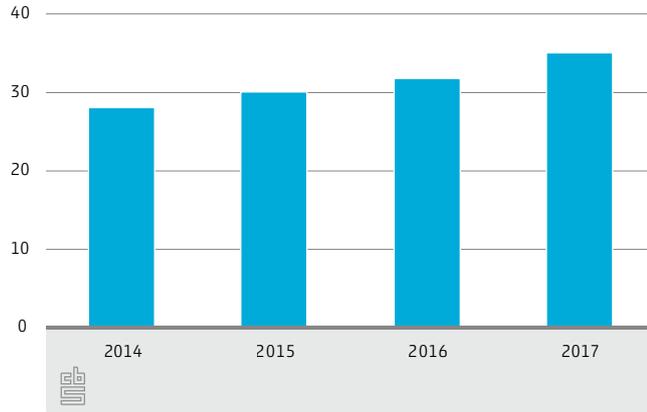
1.19 Obesity rates

% of people aged 4 years or older



1.20 Oral hygiene visits

% of people aged 12 or older

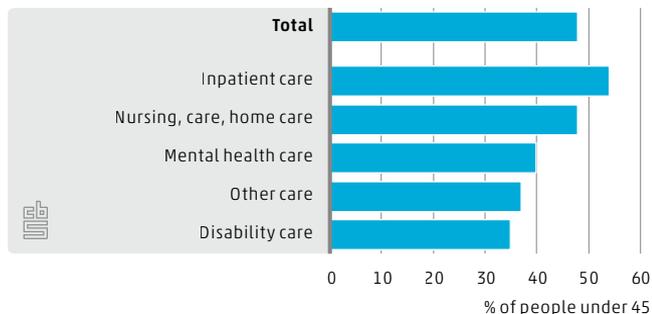


increase in the Netherlands in recent decades. In the early 1980s, 27 percent of the population aged 4 or older were overweight; this had gone up to 43 percent in 2017. The share of overweight people has remained virtually stable since 2000 (over 30 percent). On the other hand, the share of obese people has continued to rise over a longer period. Their number has almost tripled since the early 1980s but has remained fairly stable – around 12 percent – in recent years.

In 2017, 35 percent of the Dutch population aged 12 or older indicated they had visited an oral hygienist. This was still 28 percent back in 2014. People in high-income households visit the oral hygienist more often than those in lower-income households. In 2017, 42 percent from the highest income group went to the oral hygienist, against 28 percent from the lowest income group.

In 2016, there were over 167 thousand nurses working in the care sector, of whom 48 percent were under the age of 45. The share of nurses under the age of 45 is highest at hospitals (inpatient care), namely 54 percent. It is less than half in general nursing, outpatient care and homecare as well as in mental health care. At 35 percent, the share is lowest in care for the disabled. Of all nurses, 45 percent work in a hospital while over one-quarter work in general nursing, outpatient care and homecare.

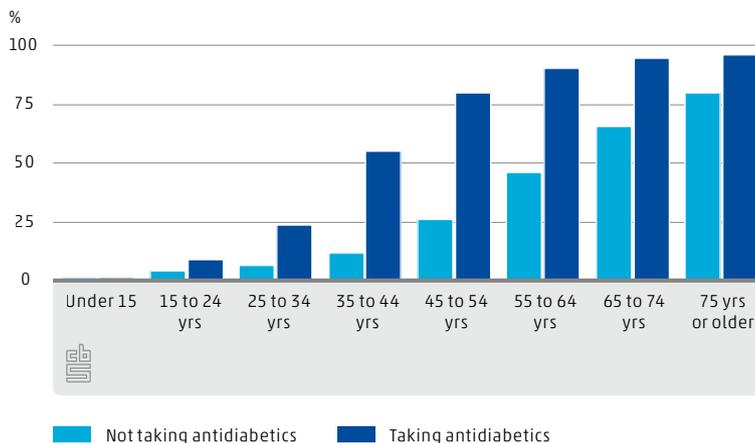
1.21 Nurses employed in care, 2016*



Source: CBS, BIG.

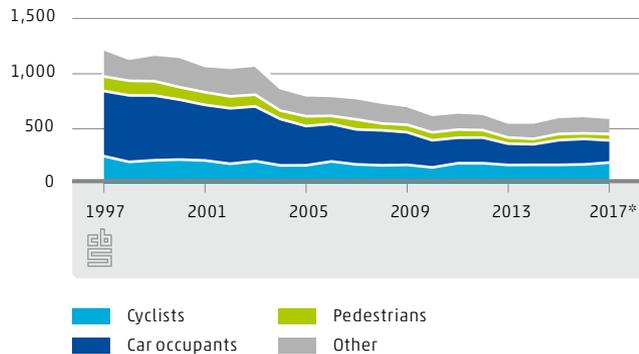
In 2016, more than 800 thousand people or nearly 5 percent of the population were prescribed anti-diabetic medication such as insulin or other blood sugar lowering medication. These diabetics are more likely to also receive medications for treatment of cardiovascular disease than non-diabetics. This holds true for all age groups and for both men and women. In the group of over-75s receiving diabetes medications, over 95 percent are also receiving cardiovascular medications.

1.22 Dispensing of cardiovascular medication, 2016

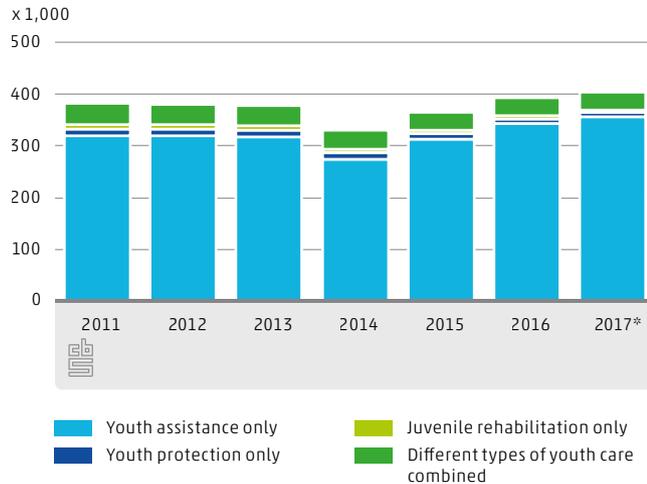


Source: CBS, National Health Care Institute.

1.23 Traffic deaths in the Netherlands by traffic participation



1.24 Youth receiving youth care

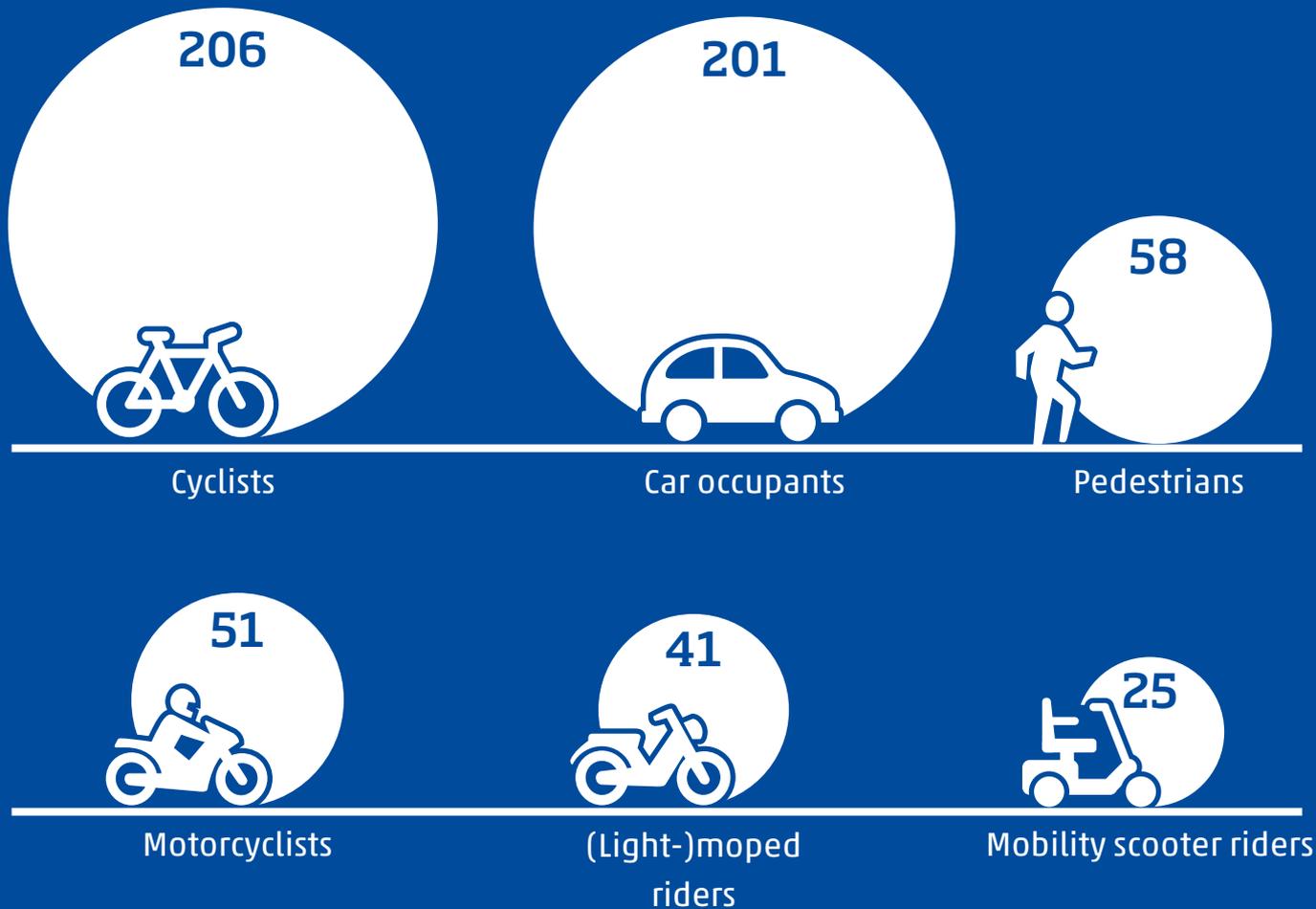


In 2017 there were 613 traffic deaths, including 453 men and 160 women. Among them were 206 cyclist fatalities (34 percent). It is the first time that more cyclists than car occupants (33 percent) were killed in road accidents. Two decades previously, the number of traffic deaths was approximately twice as high. Especially among car occupants, traffic mortality saw a significant decline in this period: by two-thirds. The number of pedestrian deaths has more than halved. The number of cycling-related fatalities has fluctuated around 190 in recent years.

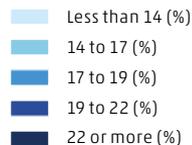
Last year, 206 cyclists were killed in road accidents; 17 more than in 2016 and the highest number in one decade. The number of car occupant deaths stood at 201. It is the first time that more cyclists than vehicle occupants were killed in road accidents. Road fatalities further included 58 pedestrians, 51 motorcyclists, 41 (light-)moped riders and 25 mobility scooter riders.

In 2017, 405 thousand young people up to age 23 (11 percent) received one or more types of youth care (including youth assistance, youth

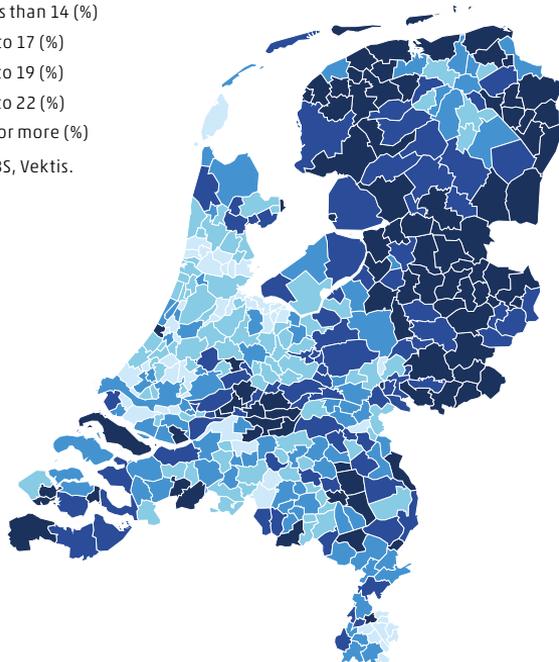
Traffic deaths, 2017



1.25 Over-80s using district nurse services, 2016*



Source: CBS, Vektis.



protection and juvenile rehabilitation services). The number has increased slightly over the past few years. The transfer of responsibility for youth services to the municipal authorities in 2015 does not seem to have had a significant impact. The drop in 2014, just prior to the introduction of the new Child and Youth Act, was due to administrative changes. Not all youth assistance was included in registrations that year. The number of young people receiving youth protection or rehabilitation services saw an annual decline in the period 2011–2017.

In 2016 (reference date: second Friday of November), 18 percent of the elderly aged 80 and over were receiving district nurse services. They included 20 percent of elderly women and almost 14 percent of elderly men. In the group aged 80 to 84, such services were provided to 12 percent, while the share was close to 30 percent among those aged 90 and over. In all age groups, more women than men are visited by the district nurse. The share of people aged 80 and over who use district nurse services is higher in the northern and eastern parts of the country. The difference with the rest of the

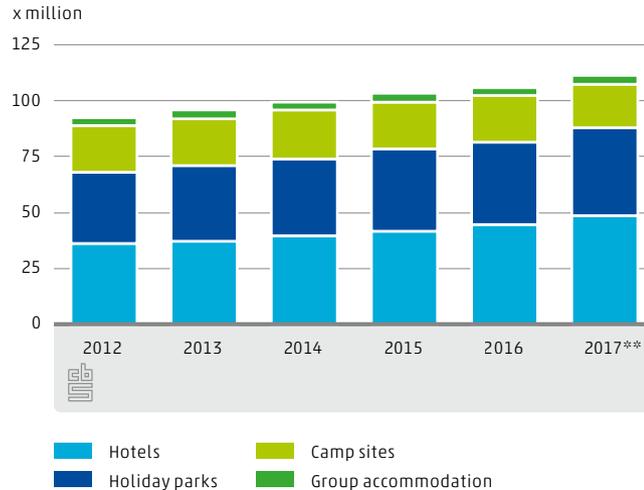
country remains when taking the regional population composition into account.

Leisure

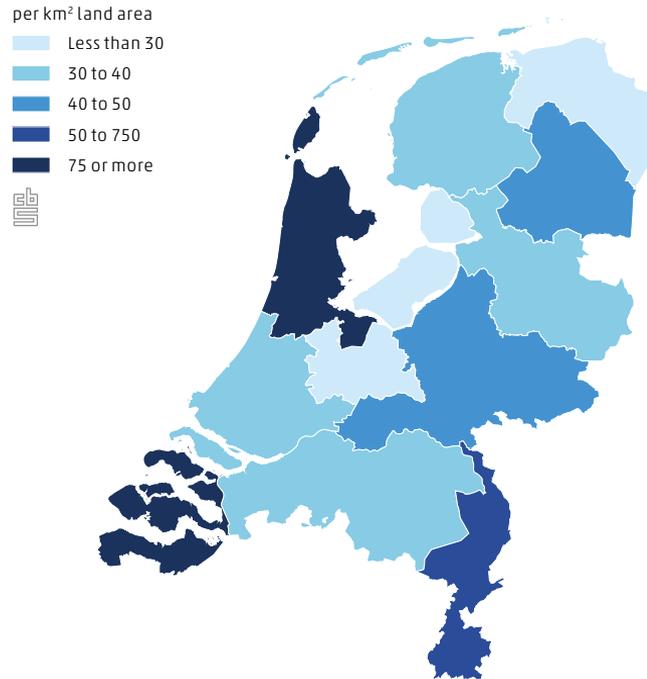
In 2017, the number of guests staying in overnight accommodation in the Netherlands rose to 42 million, a year-on-year increase of almost 9 percent. It is the highest growth rate since 2006. The growth in tourism is primarily driven by foreign visitors. This number increased by 13 percent year-on-year. Domestic tourism grew by over 5 percent.

Just as the number of guests, the number of overnight stays in Dutch accommodation increased, to 111.7 million (2017). This growth is mainly due to the rising number of hotel stays, by nearly 10 percent. The number of overnight stays at holiday parks grew by over 5 percent. On the other hand, fewer nights were spent at campsites. The number of overnight stays at campsites fell by over 5 percent.

1.26 Overnight stays in Dutch tourist accommodations



1.27 Number of beds in overnight accommodations, 2018*



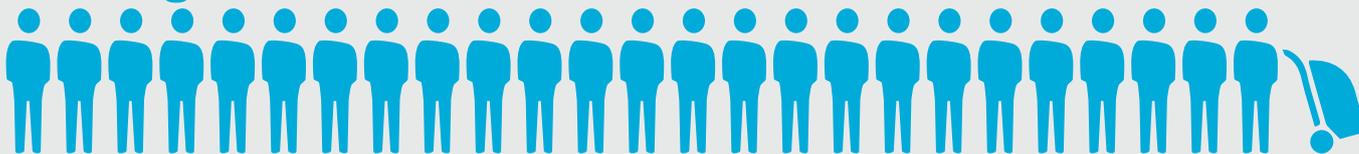
The highest number of sleeping accommodations per sq km of land area can be found in the provinces of Zeeland and Noord-Holland. Types of accommodation vary widely, however. In Zeeland, two-thirds of sleeping accommodations are on campsites; in Noord-Holland, half are hotel beds. A large part of these hotel beds are in the Amsterdam region.

An average fitness centre has over 1,100 members, with numbers ranging from around 400 (small fitness centres) to over 3thousand memberships for the large ones. A total of 2.25 million people are members of a fitness club, of whom 12 percent are younger than 18 years. Almost nine in ten fitness clubs offer group instruction as well. One-quarter of all fitness centres do not (only) provide group instructors but offer lessons on a screen.

Dutch tourist accommodations, 2017

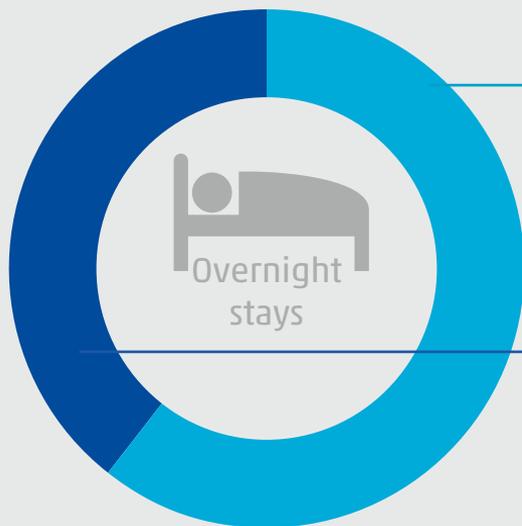
Dutch guests

24.3 million



Foreign guests

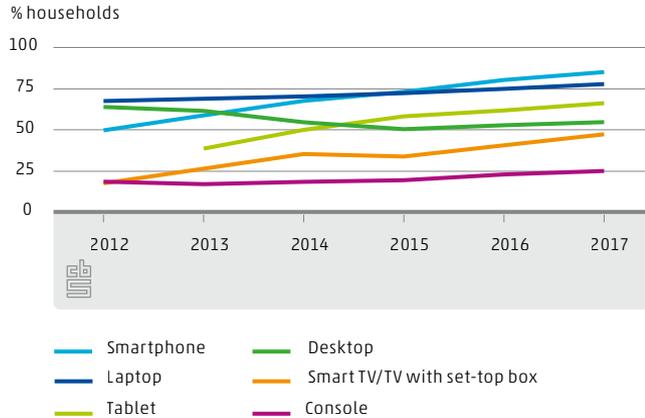
17.9 million



Dutch guests
67.5 million nights

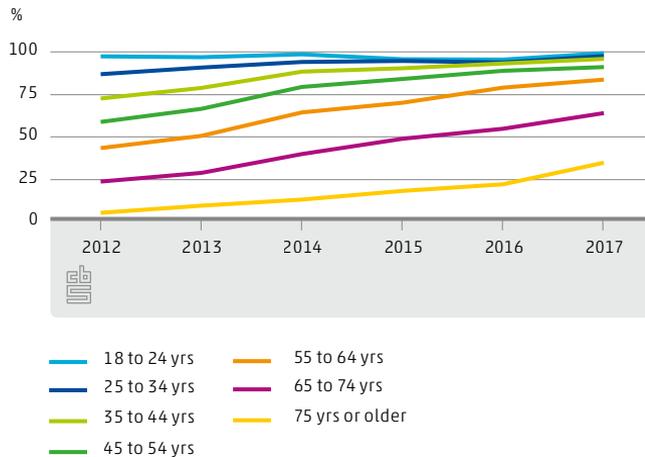
Foreign guests
44.2 million nights

1.28 Internet devices



Smartphones and laptops were the most frequently used internet devices used by households in 2017. Smartphones could be found in 85 percent of all households, laptops in 78 percent. Especially smartphones have gained a lot of ground in recent years. In 2012, only 50 percent of households possessed one or more smartphones. More and more households own a tablet, smart TV, or TV with set-top box (STB). In 2017, two-thirds of households had a tablet while nearly half had a smart TV or a TV with an STB.

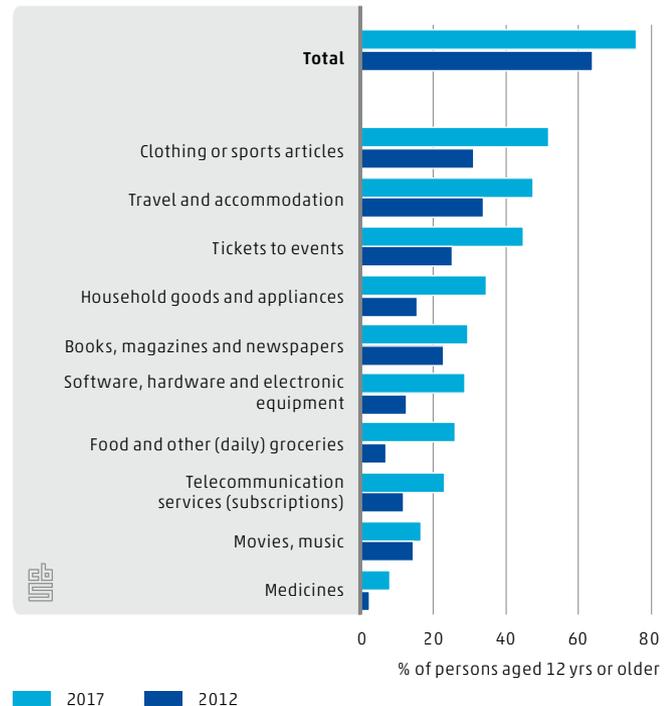
1.29 Use of social media



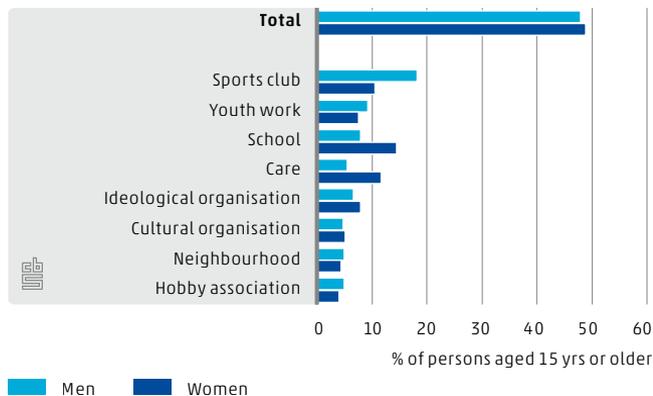
Older adults are increasingly active on social media. In 2017, 64 percent of the respondents aged 65 to 74 years said they had used social media in the recent past. This was only 24 percent five years previously. An increase in social media use was also seen among people aged 75 and over. Nowadays, over one-third of the over-75s are active on social media, versus 5 percent in 2012. When looking at the youngest age groups, social media are used by virtually everyone.

Over three-quarters of the Dutch population aged 12 years or older purchased something on the internet in 2017. This is an increase of 12 percentage points compared to five years previously. As in previous years, the most frequently made online purchases included sports equipment, travel and holiday packages as well as tickets to events. The sharpest increase in recent years was seen in online purchases of food and other (daily) groceries.

1.30 Online purchases



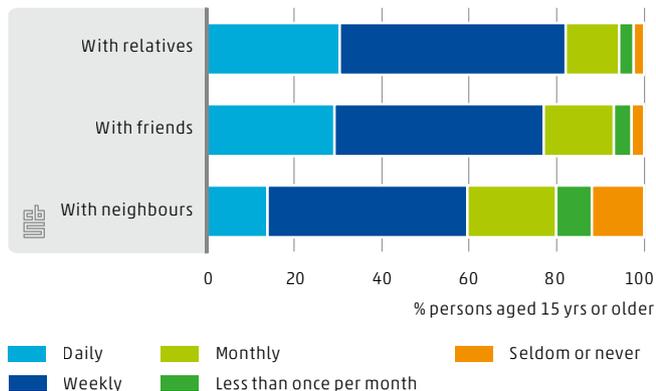
1.31 Volunteering, 2017



Around half of the Dutch population aged 15 years and over engaged in volunteer work last year. The shares were equal for both men and women. Men and women are volunteering for different types of organisations. Most men are active for sports clubs, while women are more likely to volunteer for schools and in care.

Three out of ten Dutch people aged 15 or older have daily contact with relatives who do not live with them. A more or less equally large group are in daily contact with friends. Fourteen percent see neighbours on a daily basis, but 12 percent seldom or never talk to their neighbours. The level of social contact has hardly changed over the past few years.

1.32 Social contacts, 2017

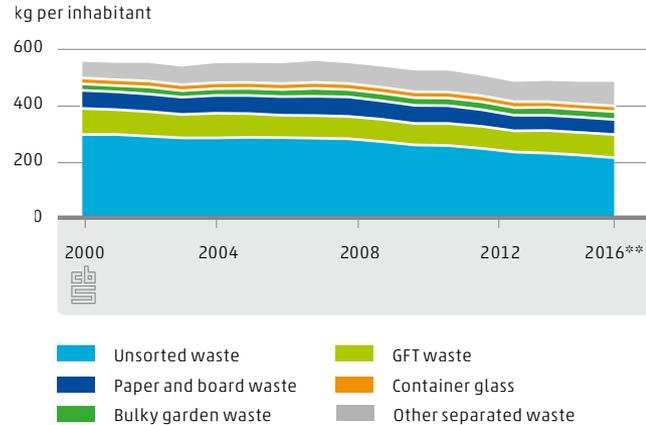


Nature and environment

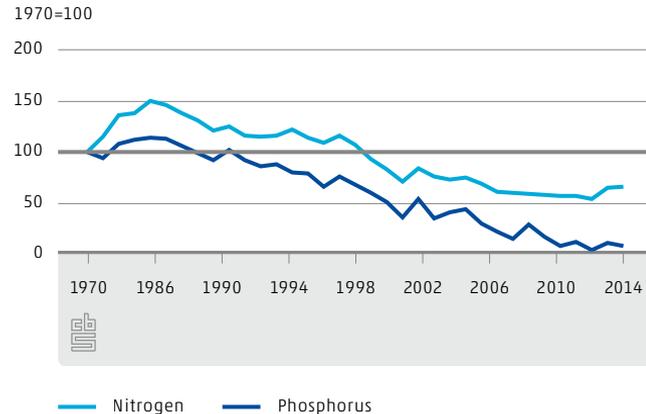
Between 2000 and 2007, the volume of household waste per inhabitant remained stable at over 560 kilograms (kg) per year. After 2007, the volume decreased to 495 kg per inhabitant in 2016. Of this waste, 55 percent (273 kg) was collected separately and 45 percent (222 kg) was unsorted waste. Part of the unsorted waste is still separated mechanically after collection.

Between 1970 and 1986, nitrogen and phosphorus surpluses in agriculture increased rapidly due to intensification of livestock farming. These surpluses were reduced after 1986 following a number of legislative measures. The phosphorus surplus has virtually disappeared as a result. The nitrogen surplus was reduced more slowly and even increased again in 2015 and 2016. This was due to higher input of nitrogen from livestock manure and chemical fertilisers, not accompanied by higher output of nitrogen through agricultural crops.

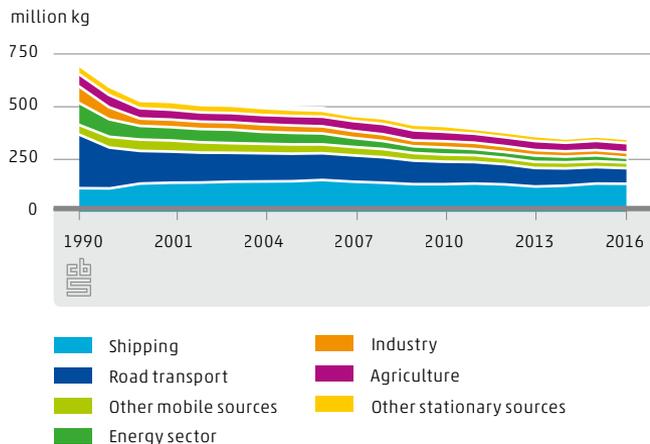
1.33 Collected household waste



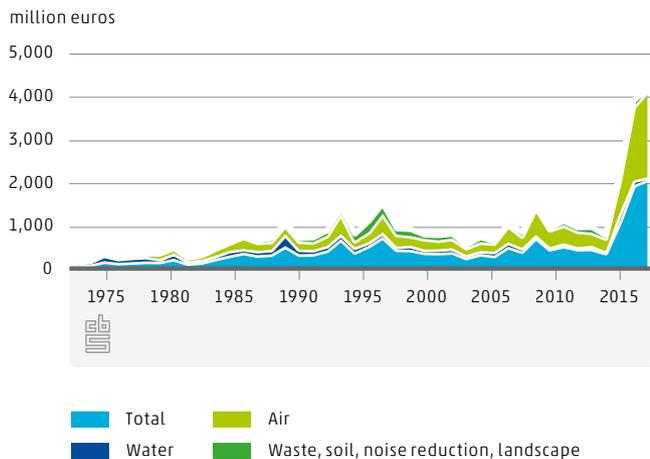
1.34 Nutrient surpluses in agriculture



1.35 Emissions of nitrogen oxides



1.36 Environmental investments in the private sector



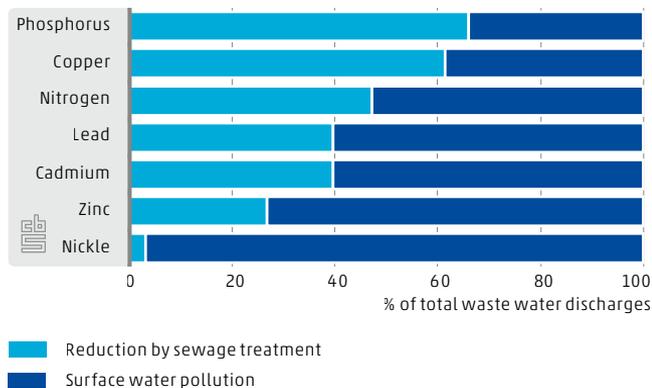
Nitrogen oxide emissions were halved in the period 1990–2016 as vehicles had to meet ever stricter emission standards, but also due to measures taken in the manufacturing and energy sectors. In 2016, emissions declined by 10 million kg relative to 2015. This was largely the result of more stringent emission requirements for passenger cars and heavy goods vehicles. Over two-thirds of nitrogen oxide emissions are related to traffic and transport (including maritime shipping).

In 2016, Dutch companies in the sectors mining and quarrying, manufacturing and public energy and water supply invested 2.1 billion euros in environmental provisions. This is five times the amount in 2013, when 402 billion euros was spent. Environmental investments had not been this high before. Of the total amount in environmental investments in 2016, 95 percent was spent on measures that should lead to improved air quality and a cleaner energy supply. The remainder was distributed to benefit the quality of water, soil and landscape preservation, among other aspects.

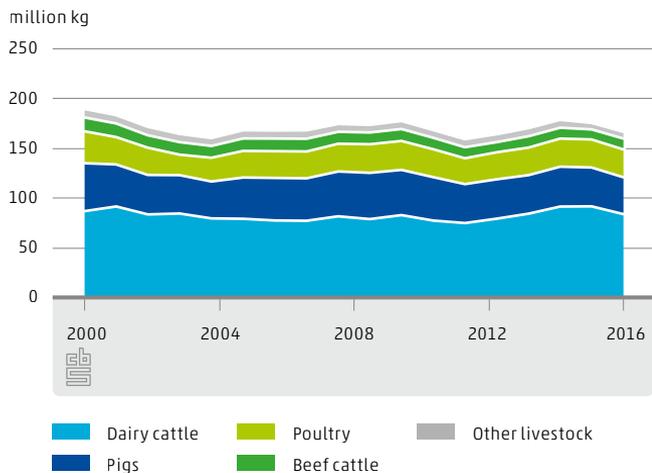
The surface water is being polluted by discharges from industry, residual discharges from sewage plants, airborne pollution, and runoff from agricultural land in particular. Sewage treatment lowers the actual amount of surface water pollution considerably. Without sewage treatment, there would be twice as much nitrogen in the surface water, and two-thirds more phosphorus. For heavy metals such as lead and cadmium, this would be 40 percent.

In 2017, Dutch livestock produced 168 million kg of phosphates. This is 5 percent less than in 2016. This is mainly the result of reductions in the dairy herd and the amount of phosphorus in roughage for dairy cattle and pigs. Nearly 60 percent of the Dutch livestock sector's phosphate production originates from beef cattle manure. Over 20 percent is from pigs, 15 percent from poultry and 5 percent from other livestock. Between 2013 and 2015, phosphate production grew mainly due to an increasing dairy herd.

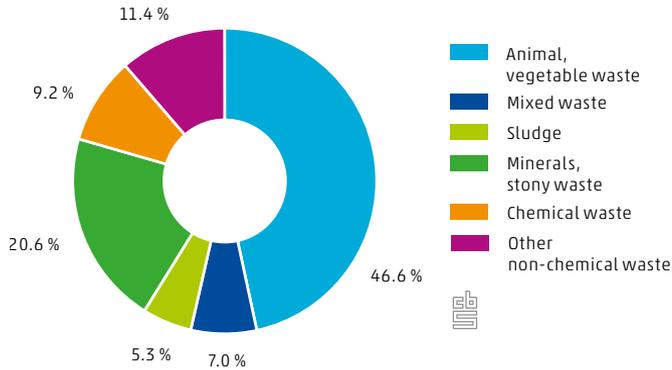
1.37 Effect of sewage treatment, 2016



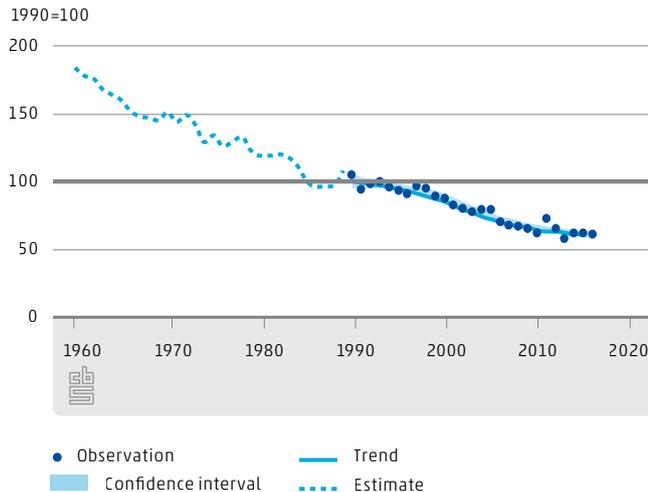
1.38 Phosphate production by livestock



1.39 Industrial waste, 2016



1.40 Farmland birds in the Netherlands



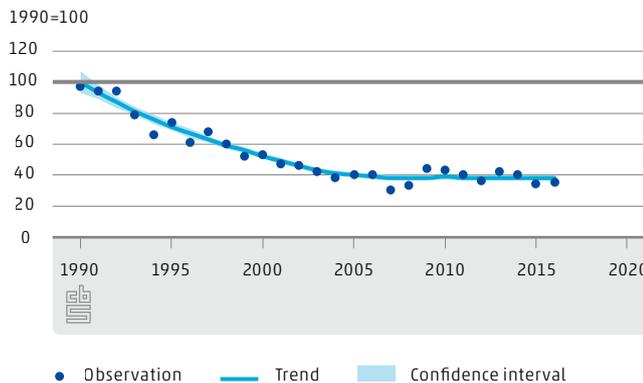
In 2016, nearly half of industrial waste (14.1 billion kg) consisted of animal and vegetable waste from the food, beverages and tobacco industry. The bulk (95 percent) of manufacturing waste is given a useful purpose such as recycling or incineration with energy recovery. Glass, paper and metal waste are being recycled almost completely.

Based on 27 bird species, the farmland bird indicator shows a 60 to 70 percent decline in the breeding bird population on Dutch farmland since 1960. The number of breeding pairs fell from an estimated 4 million in 1960 to slightly over 1.5 million in 2016. Some species have become practically extinct in large parts of the Netherlands. An estimated 750 thousand to 1.1 million breeding pairs of the skylark population have disappeared since 1960. The grey partridge, European turtle dove, Eurasian tree sparrow (all declined by over 90 percent) and black-tailed godwit (with a decline of over three-quarters) have become a rare sight on farmland. Their decline has levelled off recently but the populations are still far from recovered.

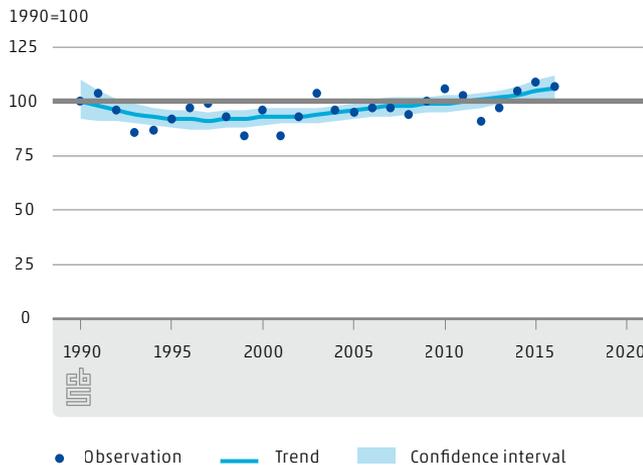
Since 1990, there has been a decline in animal populations inhabiting the open countryside such as heather, dune and extensively managed grassland areas. Over the past decade, the populations of 49 species of mammals, breeding birds, reptiles and butterflies have not changed in size on average. The number of animal species in open nature areas is declining, mainly because of more obstruction by vegetation in nature areas, such as grasses and shrubs. Habitats are lost for species which are tied to early stages of succession or open area, such as the wheatear.

Species inhabiting woodland areas have increased in number again since 1990. Breeding birds which are characteristic for mixed forests, such as the nuthatch and the pied flycatcher, as well as mammals including the common dormouse and the bank vole, have benefited from favourable developments in forests over the past few decades. A number of butterfly species inhabiting forests are also taking advantage, for example the Purple Emperor. Other species such as the White Admiral are doing significantly worse. Dutch forests have aged in recent decades, while forest management has given them a greater variety and a more natural appearance.

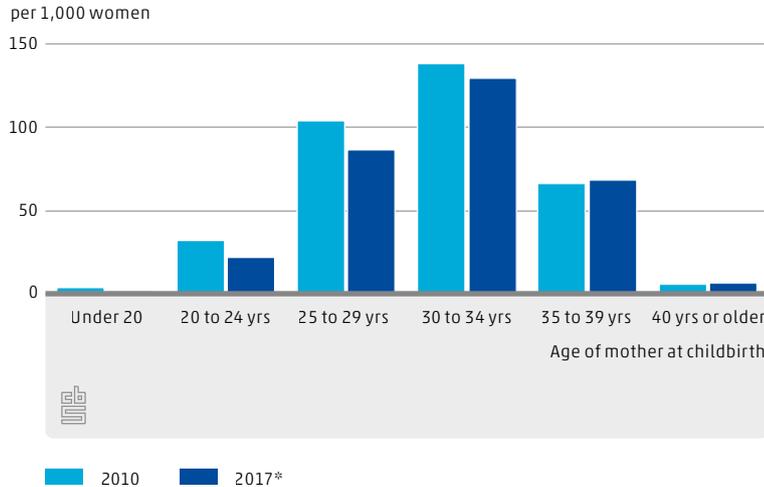
1.41 Fauna in open nature areas



1.42 Fauna in forested areas



1.43 Live births

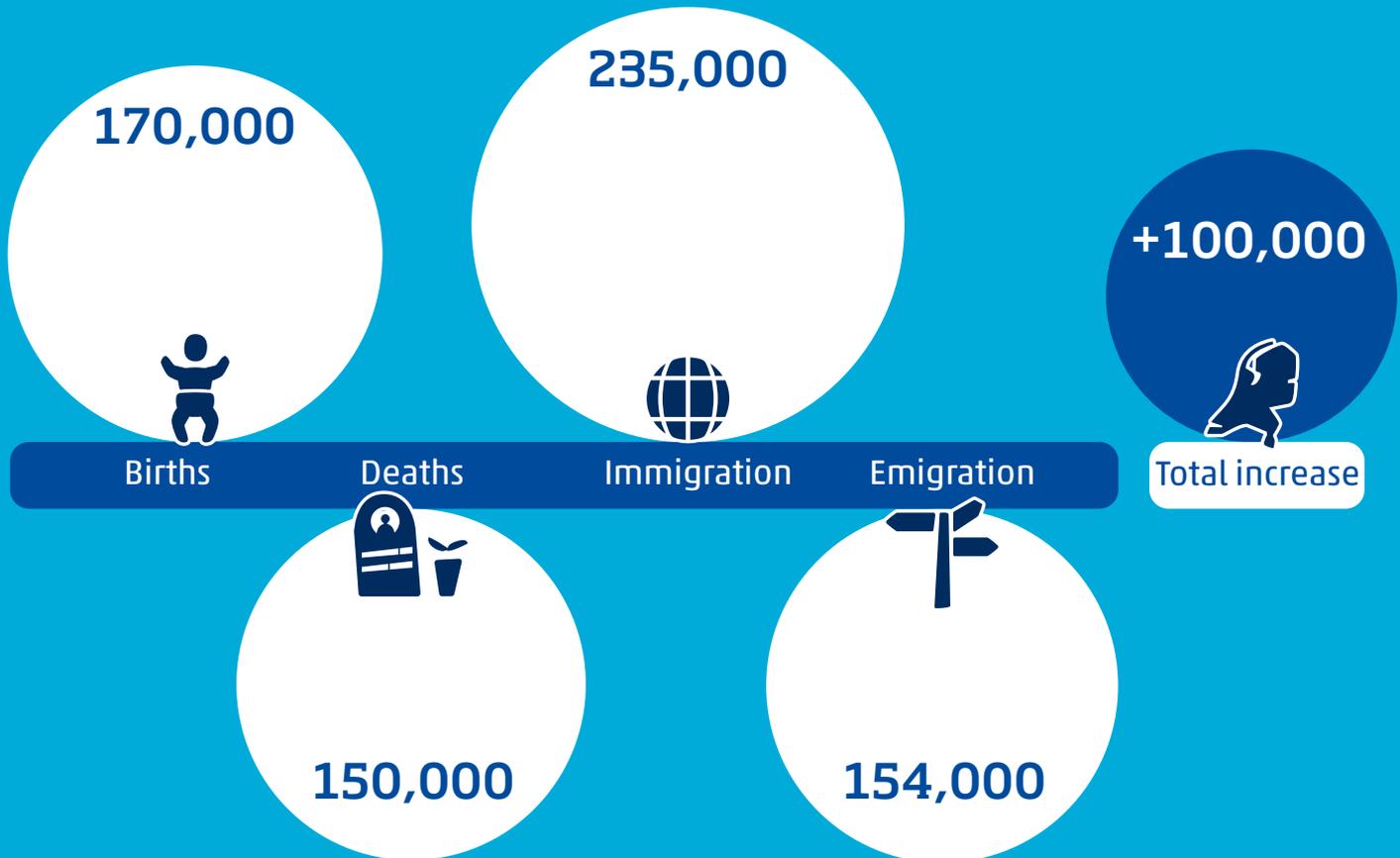


Population

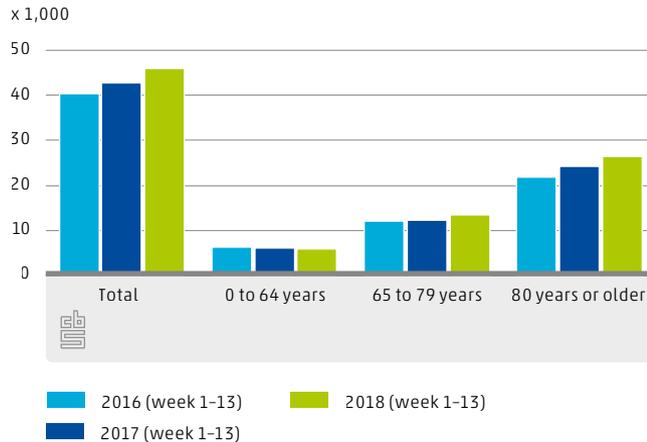
On 1 January 2018, the Netherlands had close to 17.2 million inhabitants. The population grew by 100 thousand in 2017, mainly because more people settled in the country than left. On balance (immigrants minus emigrants), 81 thousand migrants settled in our country. Natural population growth (births minus deaths) added 20 thousand to the population.

There were 170 thousand live births in 2017, almost 3 thousand fewer than in the previous year. At the start of the 21st century, the number of live births exceeded 200 thousand. Many – especially younger – women are postponing motherhood. People in their 20s have had relatively few children in recent years. In 2017, there were 55 births per one thousand women aged between 20 and 29, against 68 in 2010. The birth rate increased slightly among women over 35.

Population dynamics in 2017



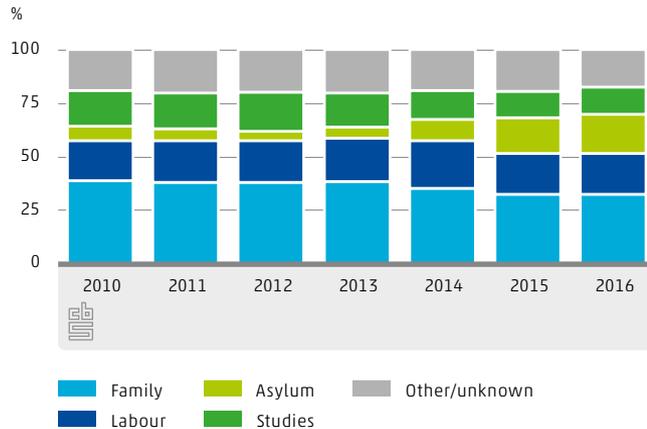
1.44 Mortality, first quarter



At 46 thousand, the number of deaths was relatively high in Q1 2018. This is 3.2 thousand more than in the same period in 2017, and even represents an increase of 5.5 thousand on 2016. Mortality was higher among the over-80s in particular, but also rose among people in the age group 65 to 79 years.

Every year, mortality is higher in winter than in the other seasons, especially among the over-80s. This is particularly the case during prolonged periods of cold and long-lasting influenza episodes, as was the case in 2018. Furthermore, mortality goes up as the number of elderly people increases.

1.45 Migration motives of non-Dutch immigrants



The main motive for non-native immigrants to settle in the Netherlands is family migration. Out of the 182 thousand non-Dutch immigrants in 2016, over 30 percent joined a family member already living here. In 2013, this applied to almost 40 percent of all non-native immigration. The share of asylum migrants has increased sharply in recent years, from below 5 percent in 2012 to nearly 20 percent in 2016. The majority were people from Syria.

Labour migration is the driving motive for almost 20 percent of non-Dutch immigrants. Their share has hovered around this percentage for a number of years. Education was stated as the main reason by 13 percent. In 2012, this share was still a few percentage points higher.

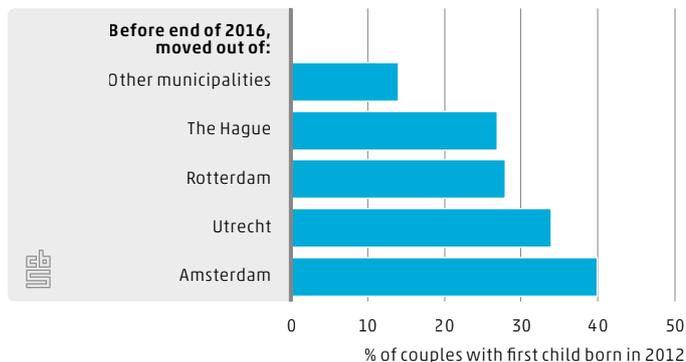
In 2017, there were 64 thousand new marriages, down by nearly one thousand on the previous year. At the turn of the century, this was close to 90 thousand. On the other hand, the number of partnership registrations increased by 2 thousand in 2017 to a total of 18 thousand. Partnership registration has seen a strong upward trend in recent years. In 2017, slightly more than 1 in 5 unions were partnership registrations, which represents a doubling of the share compared to 2010.

Families often move before the children have reached school age, particularly those living in one of the four major cities. Among families living outside the four major cities who had their first child in 2012, 14 percent moved to another municipality within four years. The share departing from the metropolitan areas was two to three times as high.

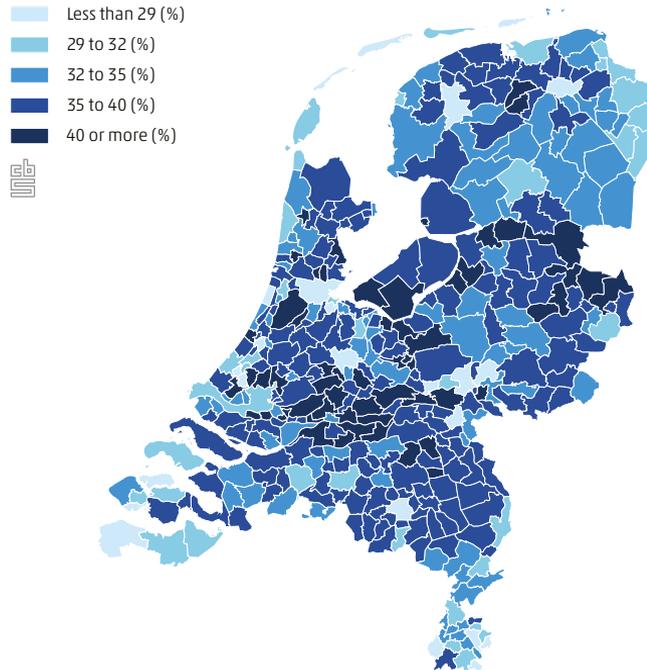
1.46 Marriage and registered partnership



1.47 Relocations to other municipalities after birth of first child



1.48 Households with children, 1 January 2017



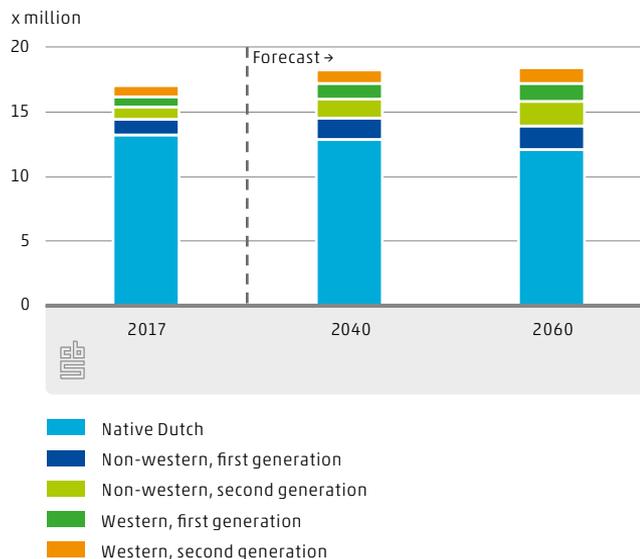
Among young families in Amsterdam, 40 percent moved to a different municipality within four years after the birth of their first child, often to somewhere near the city. The share moving away from Utrecht was 34 percent; from Rotterdam, 28 percent and from The Hague, 27 percent.

On 1 January 2017, there were 7.8 private households in the Netherlands. This included 2.6 million (33 percent) households with one or more children. The majority of children live in a household with two parents (2 million), while a minority are part of a single-parent household (0.6 million). There are relatively many households with children in the so-called Bible Belt and in cities with Vinex (new housing) districts. Relatively few households with children are found in university towns as well as in border regions, particularly Zeeland, south Limburg and east Groningen.

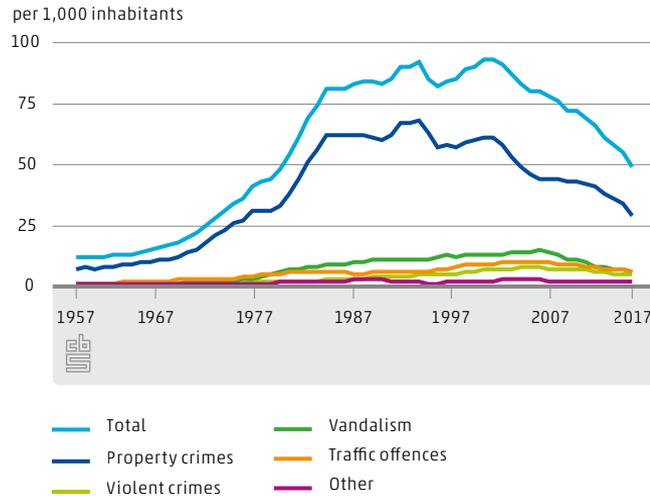
The Dutch population is becoming increasingly international: more and more inhabitants have roots abroad, either because they were born there or because their parents came from another country. On 1 January 2017, the Netherlands had 13.2 million native Dutch inhabitants against 3.9 million inhabitants with a migration background. By 2040, there will be an estimated 12.9 million native Dutch inhabitants. The number of inhabitants with a migration background will have gone up to 5.4 million.

By 2060, the number of native Dutch inhabitants will have declined to 12.1 million, while the number of inhabitants with a migration background will reach 6.3 million.

1.49 Population, by migration background



1.50 Registered crimes



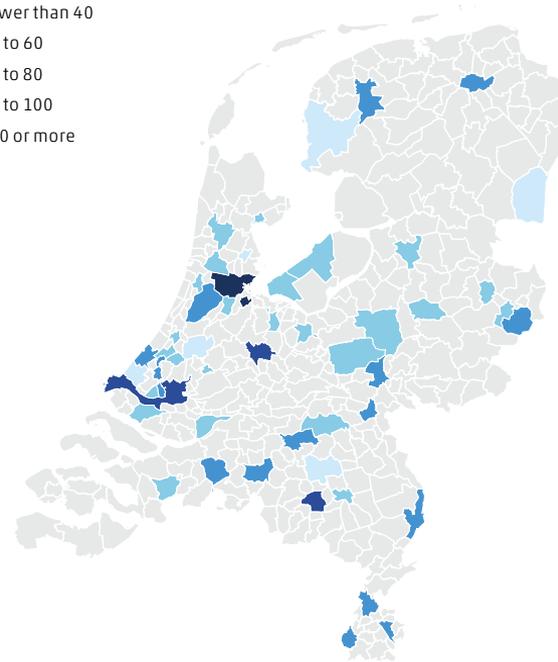
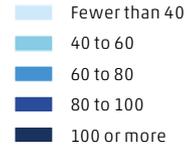
Security and justice

In 2017, the police registered 49 crimes per thousand inhabitants, which is roughly the same as in 1980. The crime rate in 2003 was 93 per thousand inhabitants. Police-recorded crime showed an upward trend between the 1950s and the 1990s, mainly on account of property crimes such as burglary and theft. This crime wave was not only visible in recorded crime, but also from the rising number of offences as reported by victims and cases of murder and manslaughter.

By far the highest proportion of crimes in 2017 were committed in Amsterdam: 103 registered crimes per thousand inhabitants. In Rotterdam, Utrecht and Eindhoven, police recorded between 82 and 90 offences per thousand inhabitants. Arnhem and Maastricht are among the smaller municipalities with a relatively high crime rate.

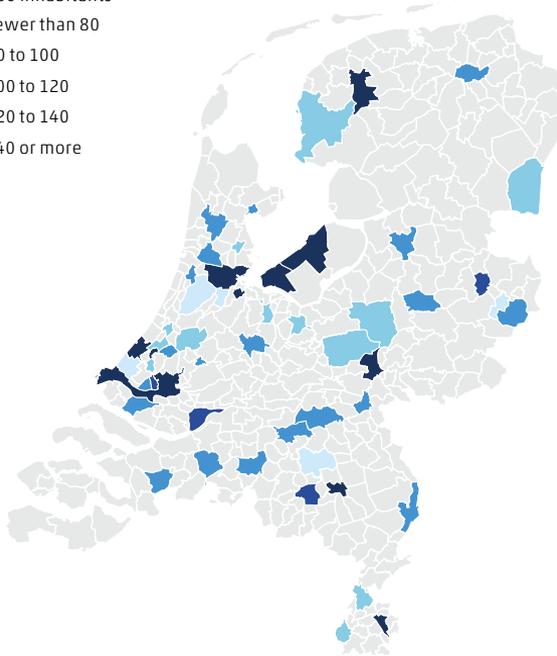
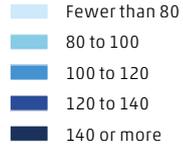
1.51 Registered crimes in municipalities with over 70 thousand inhabitants, 2017

per 1,000 inhabitants



1.52 Registered suspects in municipalities with more than 70 thousand inhabitants, 2017

per 10,000 inhabitants

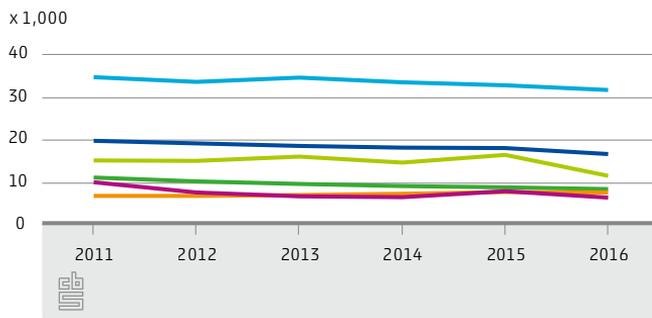


In 2017, The Hague had a crime suspect rate of 175 per 10 thousand inhabitants, the highest rate of all Dutch municipalities. Rotterdam, Lelystad, Almere, Leeuwarden and Arnhem also had relatively high crime suspect rates (over 150 suspects per 10 thousand inhabitants). There were much fewer suspects – 109 per 10 thousand inhabitants) in Utrecht. In the southern provinces, the cities of Heerlen and Helmond had relatively many registered crime suspects.

In 2016, suspects were found guilty of committing a crime by the court in 82.5 thousand cases, more than 11 percent down on 2012. The majority of crime convictions were for property, violent and sexual offences. In 2016, the number of persons found guilty of committing a traffic offence was over 23 percent lower than in 2012.

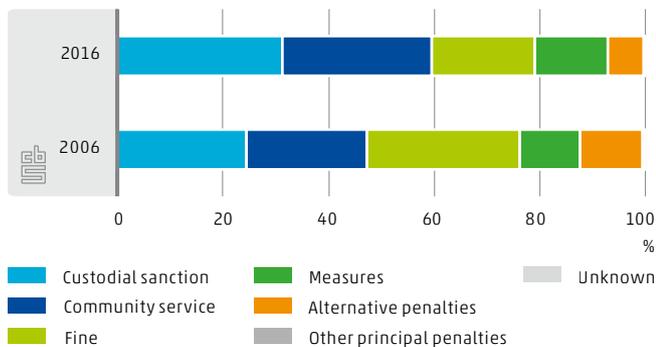
In the same year, Dutch courts imposed 115.8 thousand sanctions for criminal offences. Most common was the custodial sanction, followed by community service and fines. The share of custodial sanctions rose from 25 percent in 2006 to 32 percent in 2016. Furthermore, Dutch courts imposed relatively more community service and fewer fines compared to ten years previously.

1.53 Crime convictions by courts in first instance

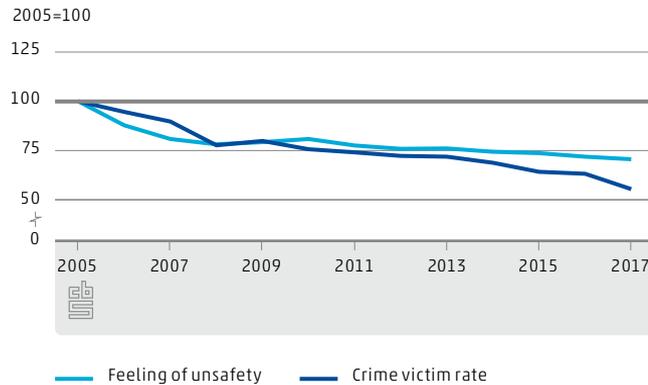


- Property crimes
- Violent and sexual crimes
- Traffic offences
- Vandalism and public order offences
- Drug offences
- Other offences

1.54 Criminal court cases, sanctions imposed by courts in first instance



1.55 Feeling of unsafety and crime victim rate

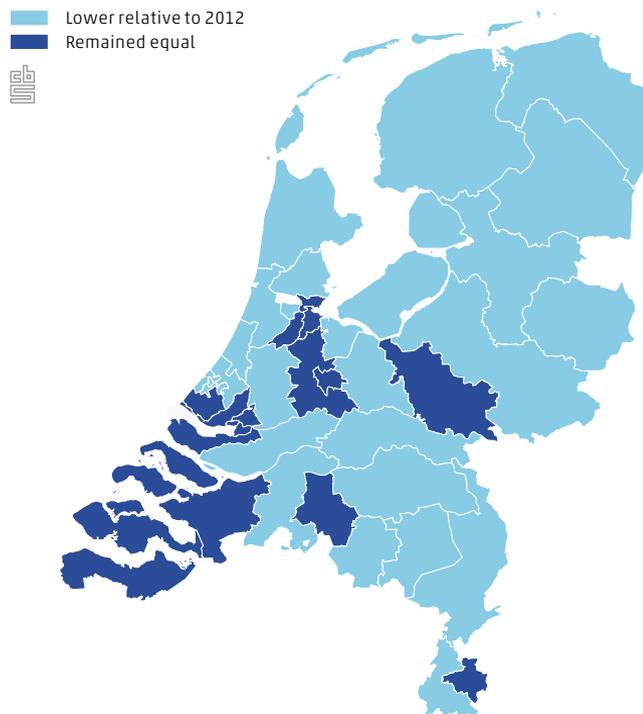


The share of people who have at one point become a crime victim has declined almost continually for more than ten years. In 2005, nearly three out of ten Dutch citizens stated they had been victims of a criminal offence. By 2017 this was 15 percent, representing a decline by 45 percent. In line with falling crime rates, the number of people who sometimes feel unsafe has become progressively lower.

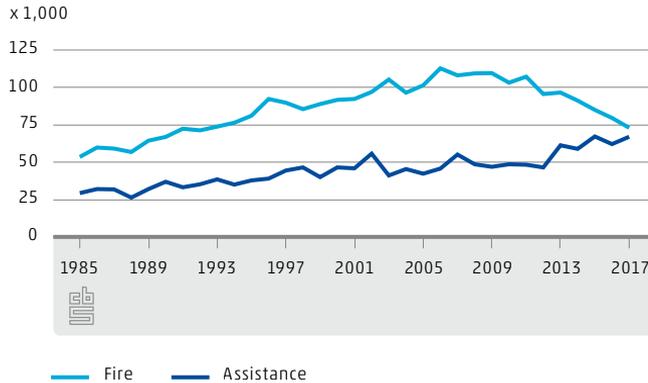
In most police districts, the crime victim rate fell between 2012 and 2017. This decline was sharpest in the police districts of The Hague Centre and South, where it fell by 10 percentage points. In 2017, the crime victim rate was highest in the districts of Utrecht City and Amsterdam North. In both districts, 26 percent of the population aged 15 and over fell victim to a crime; this share was not significantly lower than in 2012. The crime victim rate in lowest in Fryslân that year at 10 percent. This was 4 percentage points lower than in 2012.

In 2017, fire brigades received 73 thousand fire service call outs. The number of call outs by telephone has been fairly stable in recent years at around 38.5 thousand. The number of call outs due to fire alarm systems has declined, however. In 2017, fire services received nearly 67 thousand requests for assistance, more than in 2016. The number of assistances depends largely on the weather. At times of storm and flooding, fire services are in more demand.

1.56 Crime victim rates by police district, 2017

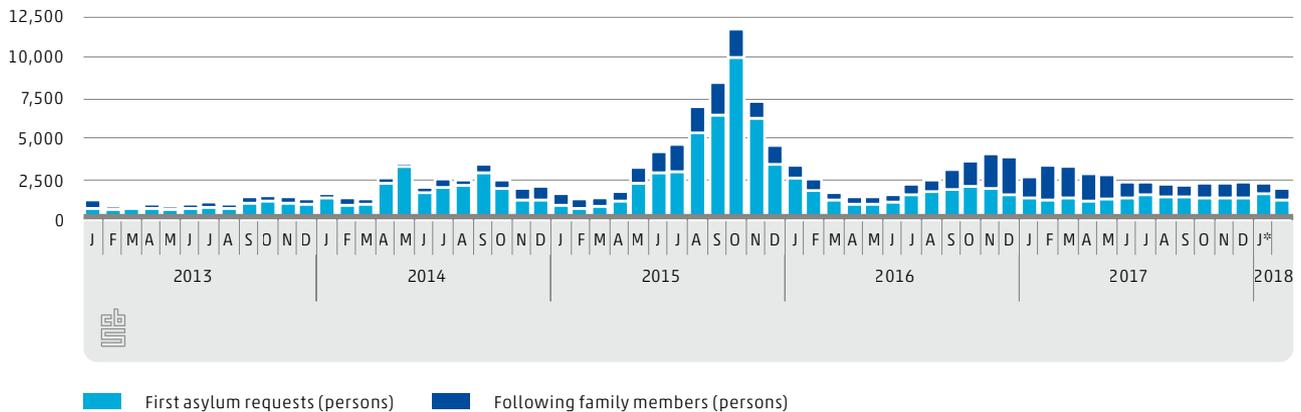


1.57 Fire service call outs



In 2017, the total number of asylum seekers and following relatives entering the Netherlands stood at 30,635, down by 550 on the previous year. The share of following relatives went up to 47 percent in 2017. In 2016 this was 38 percent. It is the highest share since the introduction of a special procedure for asylum seekers wishing to bring over their family members.

1.58 First asylum requests and following family members

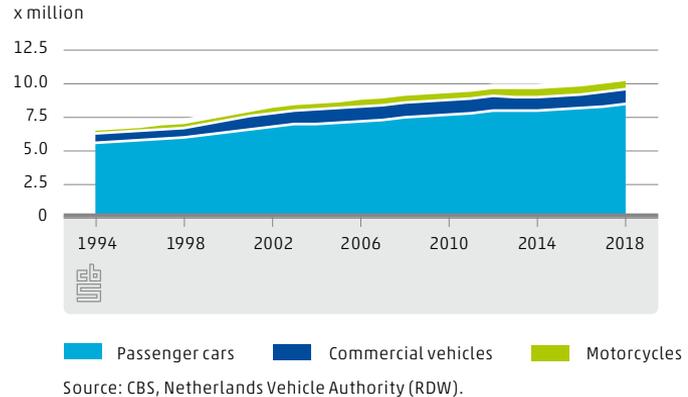


Traffic

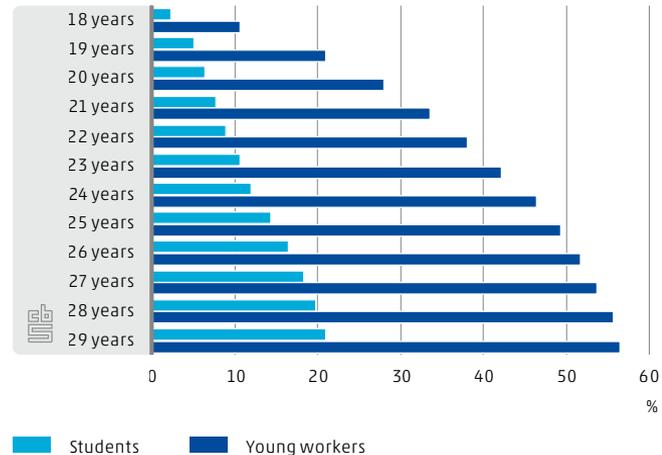
The number of passenger cars with a Dutch licence plate is rising every year. In 2017, the number rose by over 150 thousand to 8.4 million on 1 January 2018. Likewise the number of commercial vehicles and motorcycles increased again last year. In the past two and a half decades, only in 2014 were fewer motor vehicles sold than in the previous year. The total number of registered motor vehicles passed the 10 million mark in 2017. On 1 January 2018, there were 10.1 million motor vehicles in the Netherlands.

Car ownership among young people aged 18 to 29 years increases with age. Of the 18-year-olds, 3 percent owned a car in 2015, versus 49 percent of the 29-year-olds. There is a marked difference in car ownership rates between students and young workers. Eight percent of the student population own a car, versus 48 percent of the young workers. Although only a minority of young people own a car, the majority do possess a driving licence. Of the students, 60 percent have a driving

1.59 Number of motor vehicles on 1 January

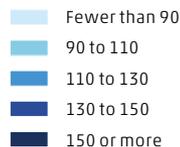


1.60 Car ownership among 18 to 30-year-olds, 2015

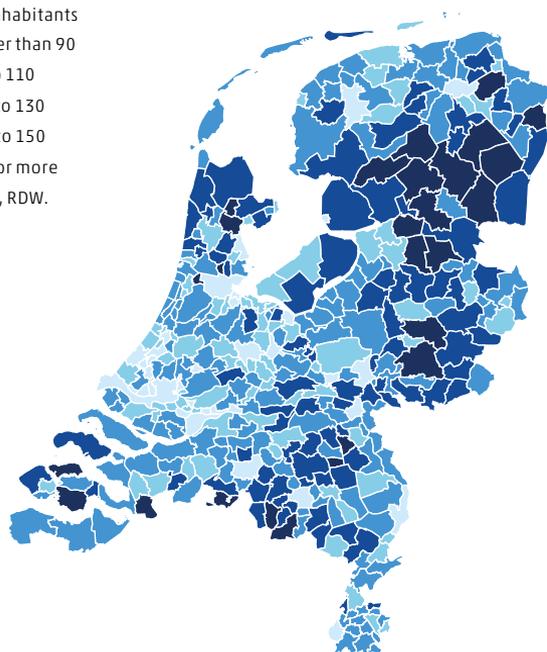


1.61 Motorcycle licence holding on 1 January 2018

per 1,000 inhabitants



Source: CBS, RDW.

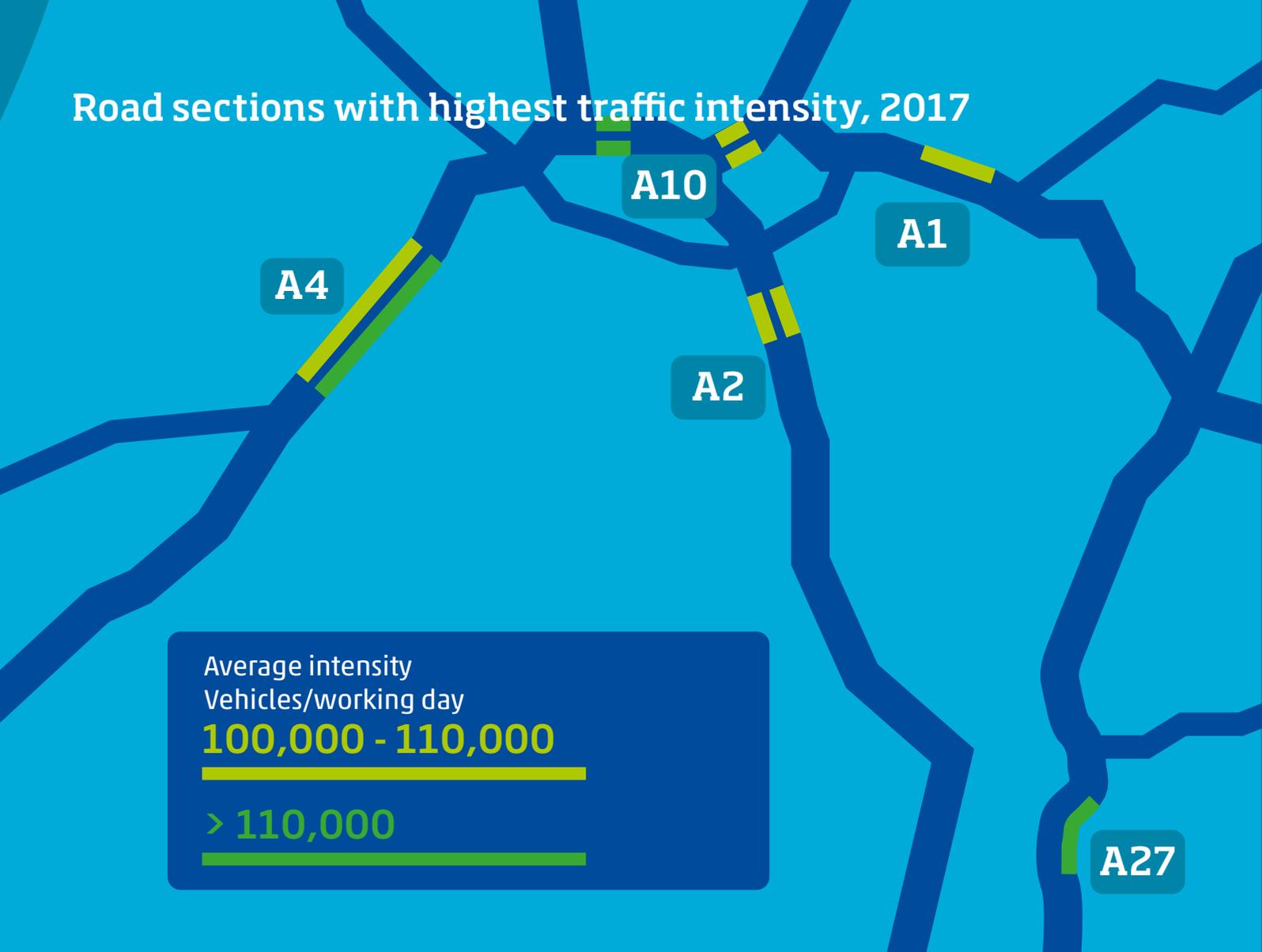


licence, against 83 percent of the young workers.

On 1 January 2018, over 1.4 million people were holders of a Dutch motorcycle licence. This is equivalent to 106 motorcycle licences per thousand inhabitants. The number of motorcycle licences per thousand inhabitants is highest in Drenthe: 143. Second is Zeeland with 127 licences for every thousand inhabitants. At the local level, the municipalities of Dalfsen (Overijssel), De Wolden (Drenthe) and Bronckhorst (Gelderland) stand out with 189, 179 and 177 motorcycle licence holders per thousand inhabitants, respectively. The lowest shares of motorcycle licence holders can be found in Rotterdam (55 per thousand) and Amsterdam (59 per thousand).

In 2017, the volume of motor vehicle traffic on Dutch national roads was 2.3 thousand vehicles per hour, almost 1 percent more than in 2016. The highest traffic density in 2017 was recorded on the A10 between the De Nieuwe Meer junction and the Buitenveldert exit: on average, slightly over 113 thousand in one working day. Other busy routes include the Buitenveldert exit

Road sections with highest traffic intensity, 2017



A4

A10

A1

A2

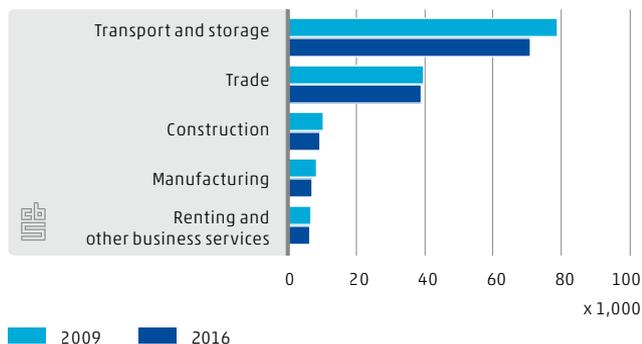
A27

Average intensity
Vehicles/working day

100,000 - 110,000

> 110,000

1.62 Top 5 business sectors with lorries and tractors for semi-trailers



1.63 Passengers at Dutch airports



up to the De Nieuwe Meer junction (A10), the A4 near Hoofddorp towards Amsterdam, and the A27 between the two junctions Lunetten and Rijnsweerd towards De Bilt.

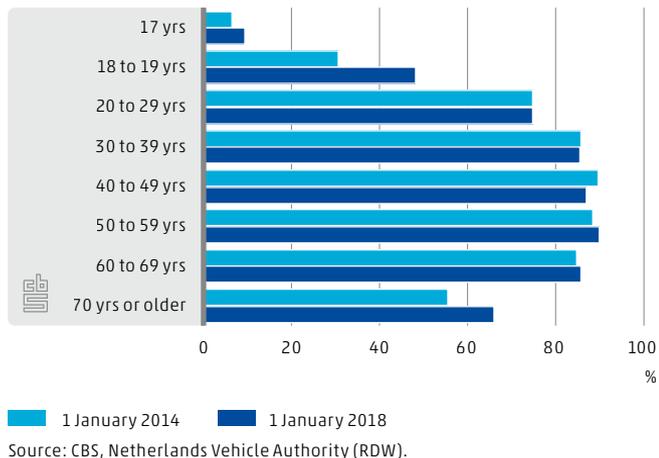
In 2016, almost 71 percent of lorries and tractors for trailers for commercial use were registered in the name of transport and storage companies, wholesalers and retailers. The number of lorries and tractors within these sectors declined by over 7.5 percent relative to 2009. In the same period, the total number of lorries and tractors was down by 7 percent.

The number of passengers travelling in and out of Dutch airports rose by 50 percent between 2007 and 2017: from 50.5 million to 76.2 million. The number of passengers passing through Amsterdam Airport Schiphol has increased by over 43 percent over the past decade. Relative to 2007, nearly three times as many passengers checked in and out at the other domestic airports. The share of these smaller airports in the total number of air passengers rose from 5 to 10 percent.

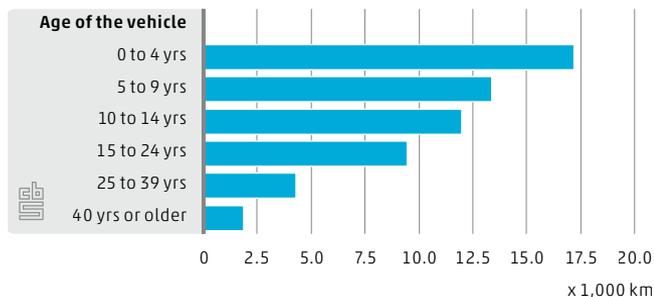
Over 11 million people have a Dutch driving licence, equivalent to 81 percent of the population aged 18 and over. The number of car driving licences is highest among people in their fifties (90 percent). Young people (17 to 19 years) and older people (70 and over) are less often in possession of a driving licence, although the numbers have increased in recent years. Among the over-70s, the share rose from 56 percent in 2014 to 66 percent in 2018. Driving licence holding went up from 7 percent to 10 percent among 17-year-olds. The sharpest rise was seen in the age group 18 to 19 year-olds: from nearly 31 percent (2014) to over 48 percent (2018).

On 1 January 2018, there were over 11 million Dutch holders of a car driving licence (category B or BE). Even more Dutch people had a valid moped licence: nearly 11.3 million. Over 1.4 million adults possessed a Dutch motorcycle licence. Less common are the VHG licence and bus driver's licence, with nearly 285 thousand and 580 thousand holders respectively.

1.64 Driving licence holding



1.65 Average annual mileage, 2016



Driving licence holding, 2018



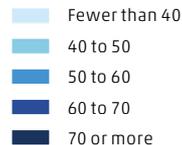
Dutch passenger cars covered a total distance of 119 billion kilometres in 2016. The distance covered by one-year-old cars was 22.4 thousand km on average; cars aged 40 years or more (oldtimers) covered 1.7 thousand wkm on average. Oldtimers therefore accounted for over 243 million km (0.2 of the total). As for cars in between the two age categories, the distance travelled in a year decreases with the age of the vehicle.

On 1 July 2017, there were over 10 thousand electric bicycles with pedal assistance up to 45 km/h in the Netherlands. These so-called speed pedelecs must carry a moped licence as of 1 January 2017. This means that unless otherwise indicated, pedelec riders must use the main road, just like moped riders. Utrecht province has the largest share of speed pedelec owners: 76 per thousand inhabitants, followed by Overijssel and Zeeland.

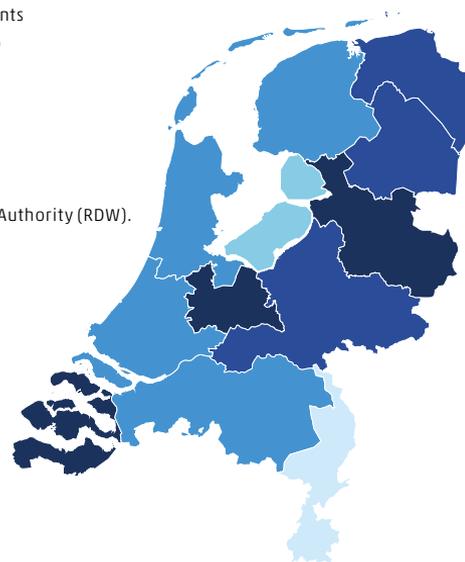
In 2016, an average passenger car with Dutch licence plate reached an annual mileage of 13.2 thousand km. There are clear differences in mileage among the various fuel types. Cars run on CNG (compressed natural gas) or LNG

1.66 Speed-pedelegs, 1 July 2017

per 100,000 inhabitants



Source: CBS, Netherlands Vehicle Authority (RDW).



(liquefied natural gas) had the highest mileage at nearly 25 thousand, followed by diesel-driven cars (23.8 thousand) and plug-in hybrids (23.4 thousand). At 10.7 thousand km, petrol-fuelled cars travelled the fewest kilometres.

Average annual mileage by type of fuel, 2016



Well-being

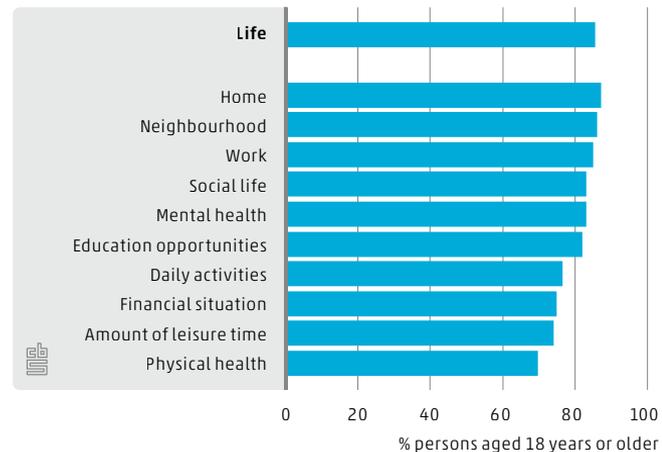
The Dutch are happy people. In 2017, almost 9 in 10 adults said they were happy. A slightly smaller group (85 percent) are satisfied with life in general. The share of people who say they are happy or satisfied has remained virtually the same in recent years.

A person's degree of happiness is partly related to marital status. Among adults who are married, more than 9 out of 10 state they are happy, which is the highest share. They are followed by unmarried adults with 85 percent being happy. The least happy are divorced and widowed people with almost 80 percent.

1.67 Happy and satisfied with life



1.68 Satisfaction level of the Dutch population, 2017

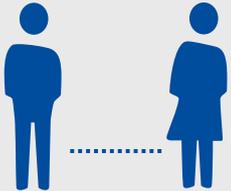


How happy are the Dutch?



Married

92%



Divorced

79%



Widow/Widower

79%



Never been married

85%

Satisfaction with life is seen in almost all areas of life, but mostly in relation to the house people live in (87 percent). The neighbourhood is rated positively by a slightly smaller share. Lower satisfaction levels are seen when it comes to people's physical health, their financial situation and the amount of free time they have available.

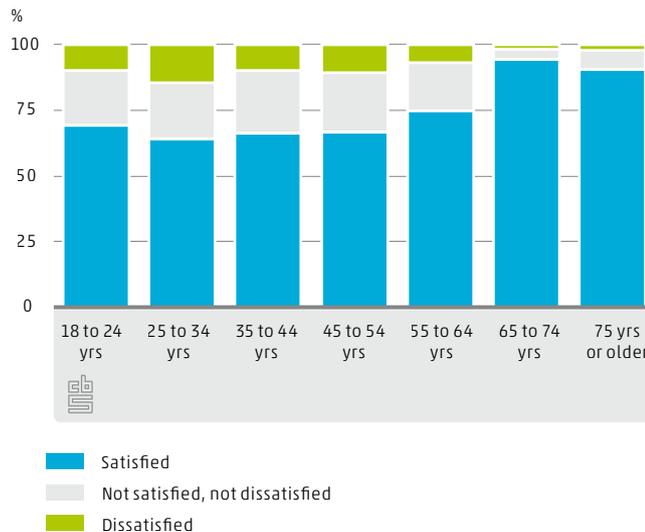
Happiness levels are partly determined by how people rate their own health. Over 95 percent of adults who have a very good self-perceived health say they are happy, against 1 percent who are unhappy. Among adults with a poor or very poor self-perceived health, 55 percent say they are happy and 16 percent are unhappy.

Older people are often happy with the amount of free time they have. This is the case for almost 95 percent of 65 to 74 year-olds. From the age of 75, this level of satisfaction diminishes slightly. Young people are often less satisfied with the amount of free time they have. Least satisfied are those in the age category 25 to 34 years: 64 percent are satisfied, versus 14 percent who are dissatisfied.

1.69 Happiness based on self-perceived health, 2017

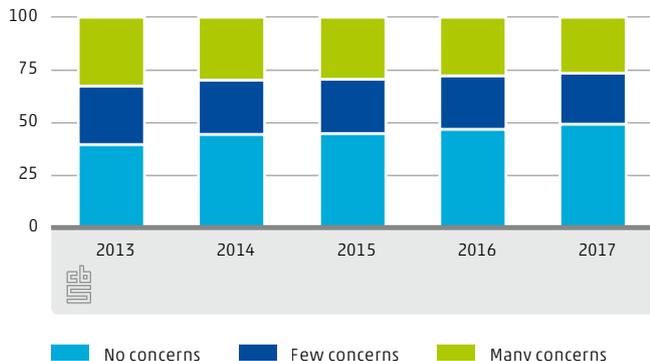


1.70 Satisfaction with amount of leisure time, 2017



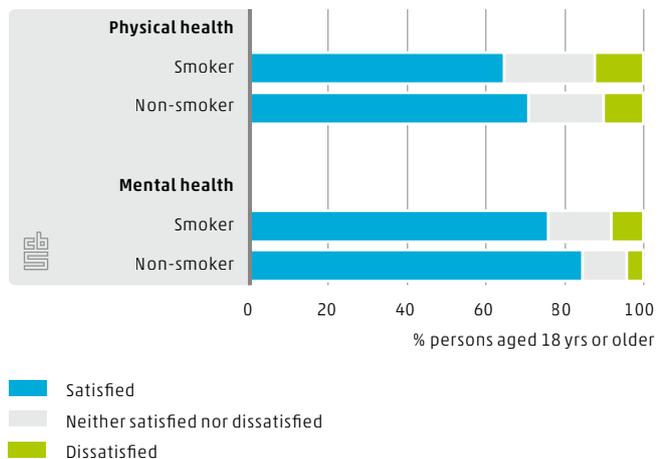
1.71 Concerns about future financial situation

% persons aged 18 yrs or older



In 2017, 26 percent of adults in the Netherlands were very concerned about their future financial situation. Half of all 18-year-olds were not concerned about this, while 24 percent were less worried. The share of adults who say they are very concerned about their future finances has declined in recent years; it was 32 percent in 2013.

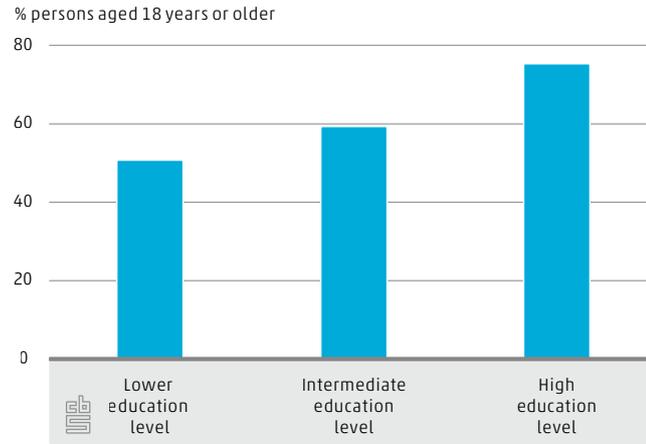
1.72 Satisfaction with health, 2017



In general, smokers are less satisfied with their health than non-smokers. This refers to both physical and mental health. Of the smokers, 65 percent are satisfied with their perceived physical health, while 76 percent are satisfied with their mental health. These percentages are 71 and 85 percent respectively for non-smokers.

Personal well-being increases as the educational attainment level gets higher. Over three-quarters of the highly educated say they have high personal well-being, versus less than half of the lower educated. In between are those with a medium-high level of education. The score on personal well-being is based on people's assessment of various life aspects, including their financial situation, their health, social life and living environment.

1.73 High personal well-being, 2017





2. Economy

Trends

Strongest growth in ten years

The Dutch economy grew by 2.9 percent in 2017. This is the strongest economic growth in ten years. This means that the Dutch economy once again grew faster than those of its most important trading partners. However, the Netherlands did have some catching up to do, as the effects of the 2012–2013 economic dip were more severe in the Netherlands than in neighbouring countries. Since 2008, our economy has lagged some way behind those of countries such as Germany and the United Kingdom.

Year of the construction industry

Many different sectors saw growth last year, but 2017 was really the year of the construction industry. Investment rose by 6.1 percent, adding almost a whole percentage point to the economic growth. The strong increase in construction is linked to the housing market heating up. A record 242,000 existing owner-

occupied homes were sold in 2017, at prices which had risen by 7.6 percent: the biggest price increase since 2002.

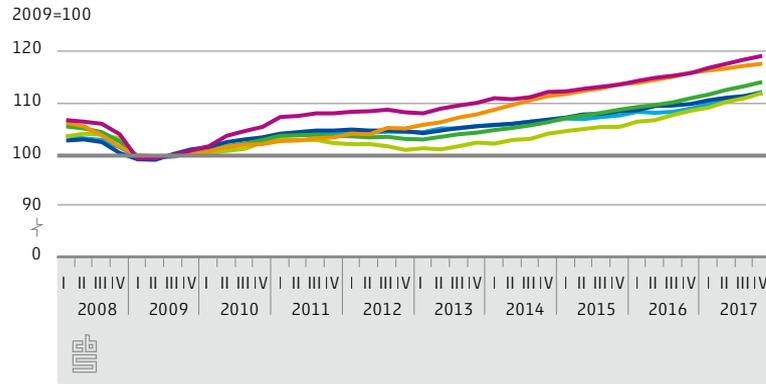
As well as construction, trade and corporate services saw strong growth in production in 2017. In the category of corporate services, employment agencies and the travel sector grew particularly strongly. The output restrictions on the Groningen gas field caused the extraction of natural resources to shrink by double figures for the fourth year running.

Exports also contributed to economic growth. The Dutch economy has focused more and more on exports in recent years, with Dutch exports growing more strongly than total global trade for some years. Household consumption also increased, but its contribution to growth was less significant than that of exports and investments.

Tense labour market

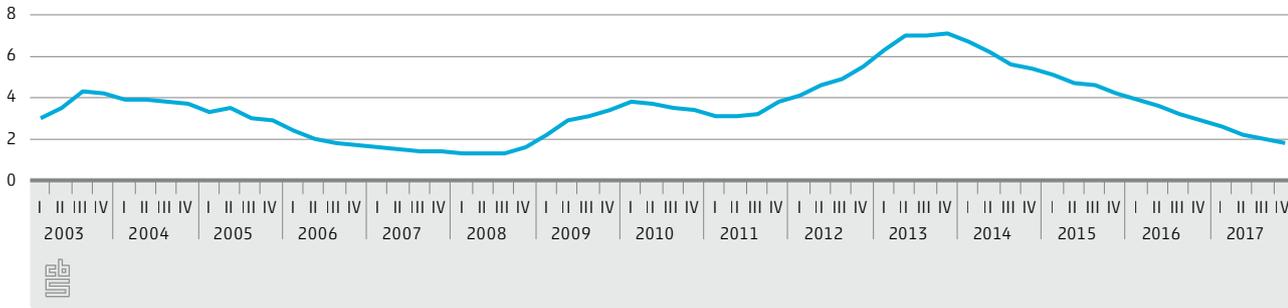
The economic growth spurt was also noticeable in the labour market, with the creation of 207,000 new jobs. With the exception of financial services, employment increased in all business sectors, especially in corporate services and trade, transport and hotels and restaurants. Partly as a result of this, the number of unemployed people was reduced by 101,000, the biggest fall in unemployment for decades. The increase in the number of jobs meant that more positions were advertised. By the end of 2017, there were 1.8 unemployed people for every vacant position. The scarcity in the labour market has almost regained the level it was at

2.1 Economic growth



Source: CBS, Eurostat.

2.2 Number of unemployed per vacancy

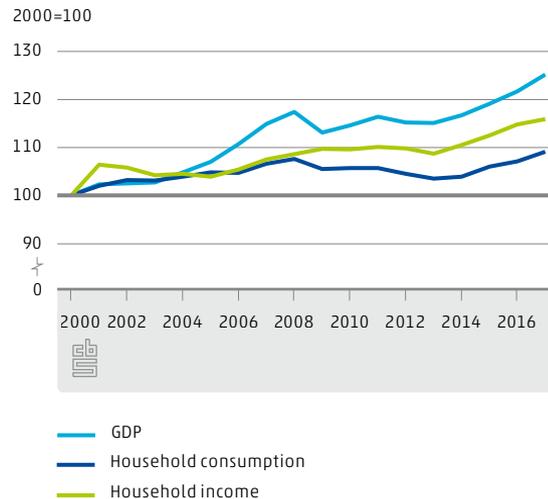


just before the crisis, when there were 1.3 unemployed people for each position.

Income growth still lagging behind

Salary levels increased considerably more slowly than employment figures. Salaries agreed through collective bargaining rose only slightly faster than prices, meaning that employees saw little improvement in their spending power in real terms. Total available

2.3 GDP versus income and consumption



household incomes increased by 1.0 percent, which is considerably less than the growth of the (actual) gross domestic product (GDP).

GDP has been growing structurally faster than household incomes and consumption since as early as 2002. The main causes for this are that the share of the economy taken up by the labour factor (the labour income share) is steadily declining and that the tax burden on citizens has increased. In spite of the large number of homes that have been sold, households' total mortgage debt only grew by 8 billion euros. As a share of GDP, mortgage debt actually fell slightly. However, the household debt ratio is still far higher than the EU average.

The number of bankruptcies was the lowest since the beginning of this century, and non-financial enterprises achieved record profits of 218 billion euros.

Fast-growing sectors in 2017

+4.1%



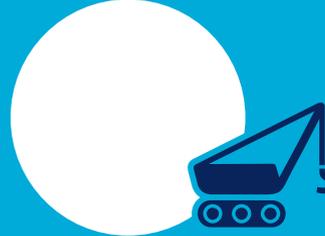
Manufacturing

+4.3%



Trade

+5.6%



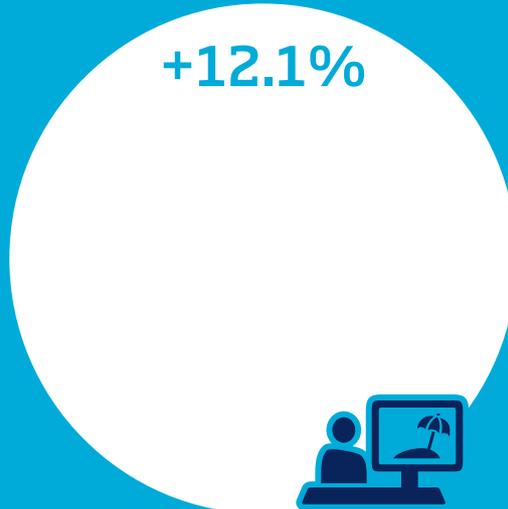
Construction

+9.4%



Temping

+12.1%



Travel

Government finances in order

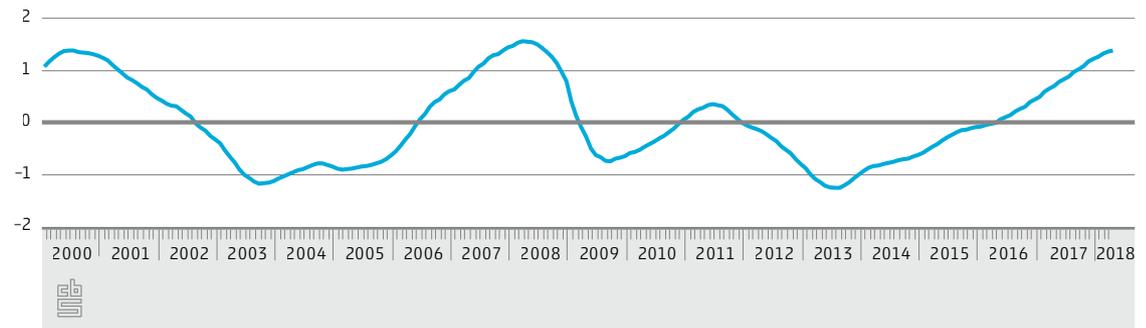
At the end of 2017, government finances were in line with the European debt standard of 60 percent of GDP for the first time since 2008. The national debt amounted to 421 billion euros, or 57.1 percent of GDP. For some years now, the government balance has met the European standard, which dictates that the government deficit must not exceed three percent of GDP. As in 2016, the government achieved a surplus in 2017. Government incomes were 9 billion euros higher than its outgoings. The budget surplus was the highest on record.

Confidence is high

The economic upturn is also noticeable in the confidence demonstrated by consumers and entrepreneurs. Consumer confidence remained at a stable, high level throughout the year. Producer confidence was positive at the start of 2017 and increased over the course of the year. Entrepreneurs ended 2017 with ambitious expectations: they anticipate further growth in turnover and investment in 2018, and they expect to take on more employees in the near future. These confidence indicators are in sharp contrast with the last period of upturn, just before the financial crisis in the autumn of

2.4 Business Cycle Tracer indicator

distance to the long-term trend (=0)

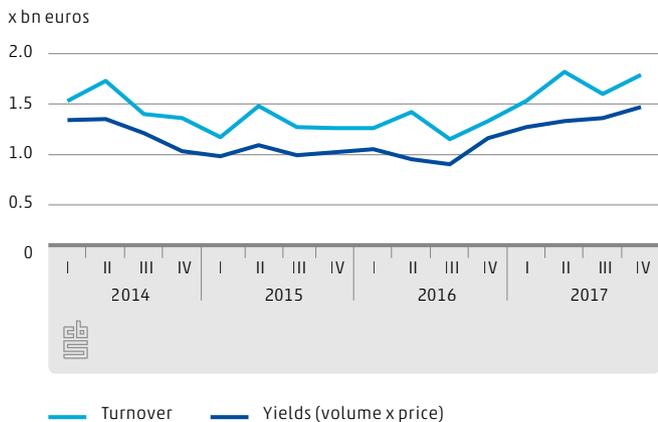


2008, when the figures for the confidence of Dutch citizens and businesses had been declining for some time. That is not at all the case now.

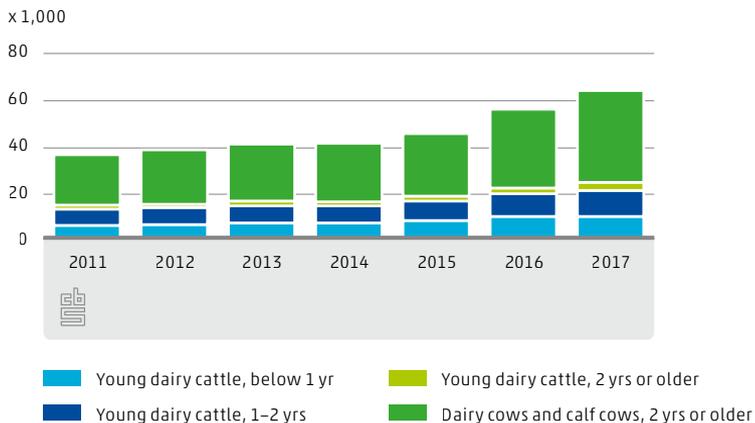
Inflation is increasing

The prices of many goods and services saw a stronger increase in 2017 than in 2016, with the prices of industrial goods rising especially quickly. Consumer prices also rose faster than in previous years, although at 1.4 percent this increase was still moderate. 2017 was the fourth year in a row that the increase in consumer prices ended below the European Central Bank's target of two percent. Consumer prices saw a limited increase elsewhere in the eurozone, too. In the housing market, not only did the prices of existing homes rise quickly, but the price increase for new-build homes was also substantially higher than in previous years.

2.5 Turnover and output in dairy sector



2.6 Organic dairy cattle (female animals)



Figures

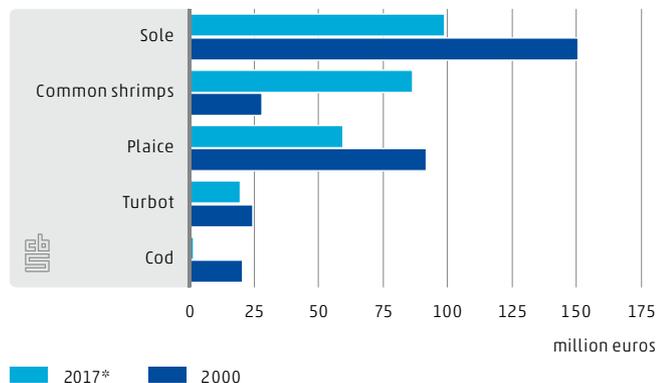
Agriculture

In 2017, turnover in the dairy sector increased by 30 percent compared to 2016. Following the abolition of the milk quota in 2015, milk production rose, while the milk price fell until 2016. In 2017, the phosphate reduction plan for Dutch dairy farms was introduced, causing a drop in the number of dairy cows and a concomitant fall in milk production. The sharp increase in the milk price caused turnover and yields to bounce back in 2017.

In 2017, the number of organic dairy cows and calf cows aged 2 years or older rose to 39,000: a rise of 17 percent compared to 2016. In 2016, the increase was 27 percent compared to the year before. Since 2011, the number of organic dairy cows has increased by over 80 percent. These numbers include the cattle on farms in the process of switching from conventional to organic livestock farming.

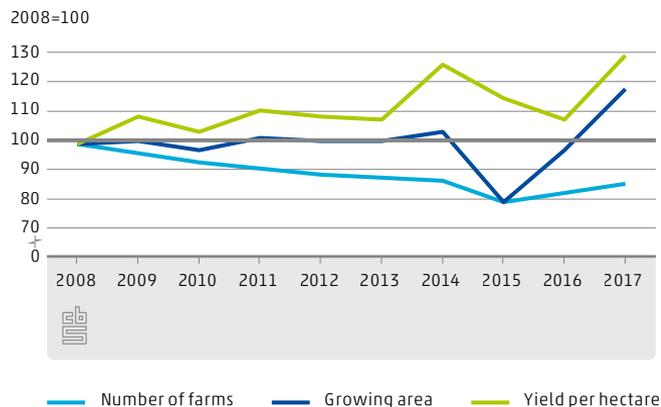
The value of shrimp landed in the Netherlands reached a record of 87 million euros in 2017. This means that revenue from shrimp is catching up with that from sole: with a value of 99 million euros, sole is the most profitable fish in coastal fisheries. In 2000 things were very different, when sole was worth 151 million euros, compared to 28.5 million euros for shrimp. The increase in shrimp revenues is mainly due to the rising price: 7.31 euros per kilo in 2017 compared to 3.37 in 2000.

2.7 Value of freshly-landed fish

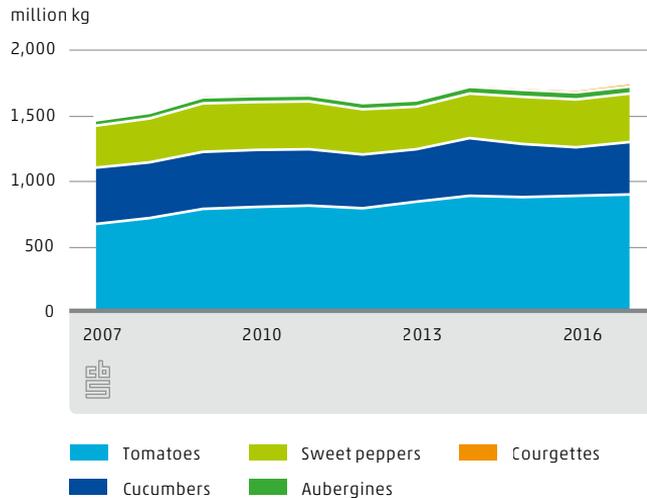


The arable land given over to sugar beet cultivation expanded from 71,000 hectares in 2016 to over 85,000 hectares in 2017. The European sugar beet quota was abolished on 1 September 2017. As a result of the introduction of new sugar beet varieties and new cultivation techniques, a record yield of 93 tonnes of sugar beet per hectare was achieved in 2017. The yield per hectare was 19 percent higher than the average for the period 2008–2016.

2.8 Sugar beet cultivation



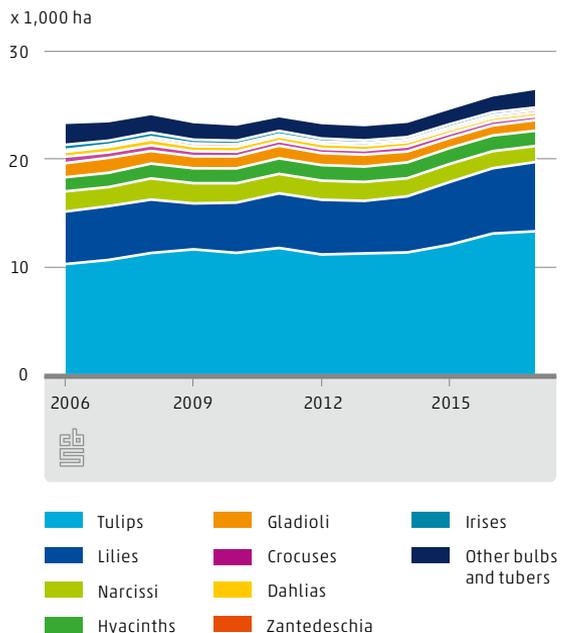
2.9 Harvest of fruiting vegetables



The harvest of fruits commonly regarded as vegetables (e.g. tomatoes, cucumbers, aubergines, courgettes and sweet peppers) has increased by 18 percent over the past ten years to reach almost 1.8 billion kg in 2017. The largest increase was in tomatoes. The tomato harvest increased by 225 million kg in ten years, a rise of 33 percent. Cucumber production fell by 7 percent to 400 million kg. Extreme weather damage to greenhouses, most notably in the De Peel region, led to a dip in the production of cucumbers in 2016.

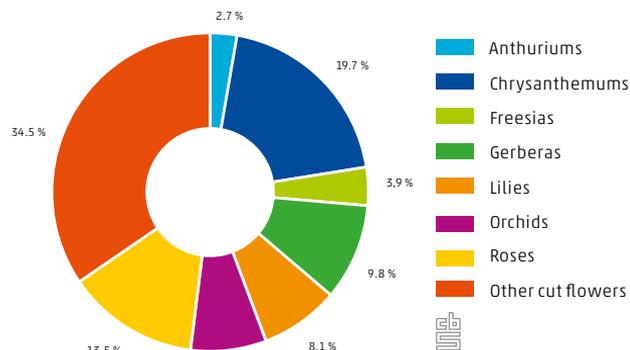
The cultivation of flower bulbs has increased by 13 percent in ten years to nearly 27,000 hectares. This growth was mainly due to the increase in the area given over to the cultivation of tulips (25 percent) and lilies (30 percent). Half of the land given over to flower bulbs is intended for tulips. Lilies take second place, occupying almost a quarter of the bulb-growing area.

2.10 Flower bulb cultivation

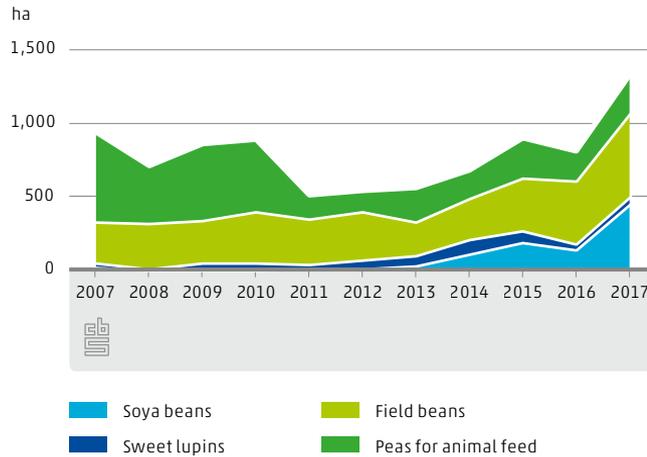


The greenhouse cultivation of cut flowers has fallen by 44 percent since 2007, to nearly 1.7 thousand hectares in 2017. The area devoted to orchid cultivation shrank by 46 percent for the same period. The area for freesias more than halved, while the area devoted to roses fell by almost two thirds. In the last five years, only the area for gerberas has held more or less steady. Cut flower cultivation is mainly losing ground to competition from Africa, where Dutch growers are also active.

2.11 Greenhouse cultivation of cut flowers, 2017



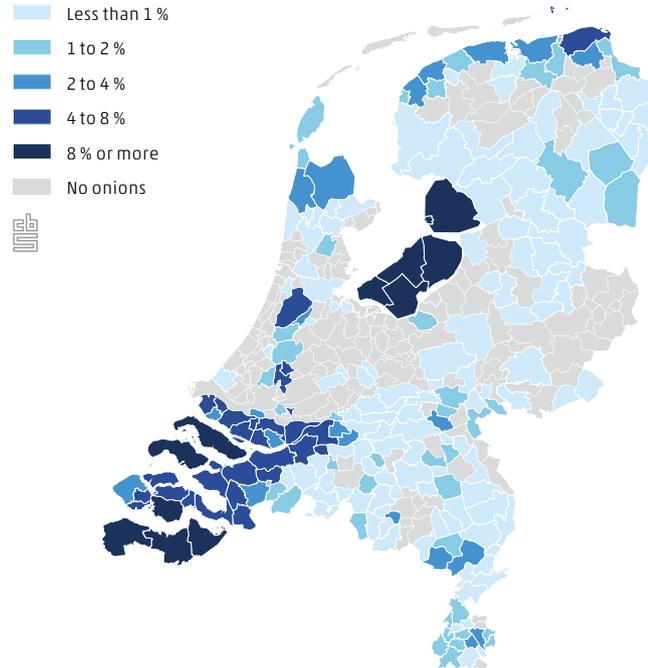
2.12 Protein-rich crops



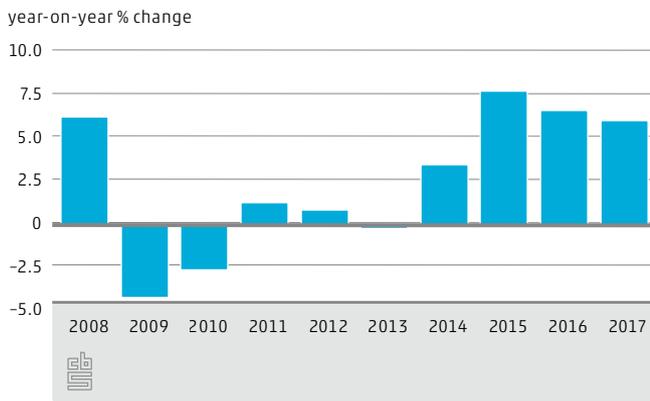
Despite various national and European incentives, until 2016 there was very little increase in the area devoted to protein-rich crops, such as soya beans, lupins, field beans and peas for animal feed. In 2017, however, the land devoted to these crops expanded by no less than 64 percent compared to 2016, to cover an area of 1,330 hectares. Soya beans are mainly grown as a raw material for animal feed. The area for soya bean cultivation tripled between 2016 and 2017, from 140 hectares to 450 hectares.

The onion is the vegetable with the largest cultivation area in the Netherlands. In 2017 the onion crop covered almost 35,000 hectares, 40 percent of the total surface area for open-ground vegetable crops and 2 percent of all arable land. Onions are mainly grown on the sea clay soils of Flevoland and the Southwest Delta region (Zeeland and the surrounding area).

2.13 Arable land used for onion cultivation, 2017



2.14 Turnover in business services

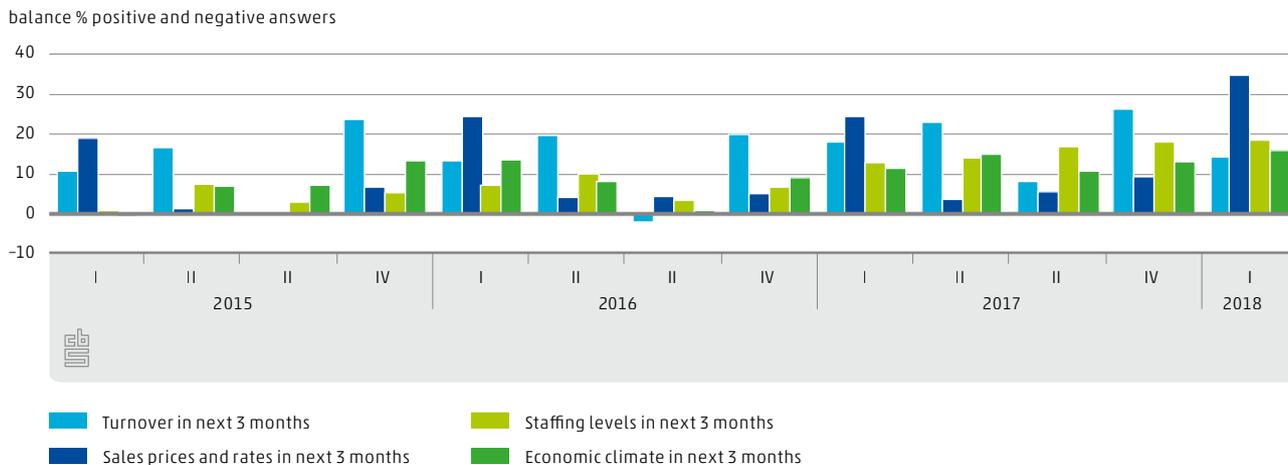


Business services

In 2017, the turnover of business services in the Netherlands rose by more than 6 percent. This is the fourth consecutive year of rising turnover. Since 2008, annual turnover only fell in 2009, 2010 and 2013. The largest increase in the last decade was 8 percent in 2015.

In recent years, most business service providers have expressed positive expectations with regard to staffing levels and the economic

2.15 Expectations of business service providers



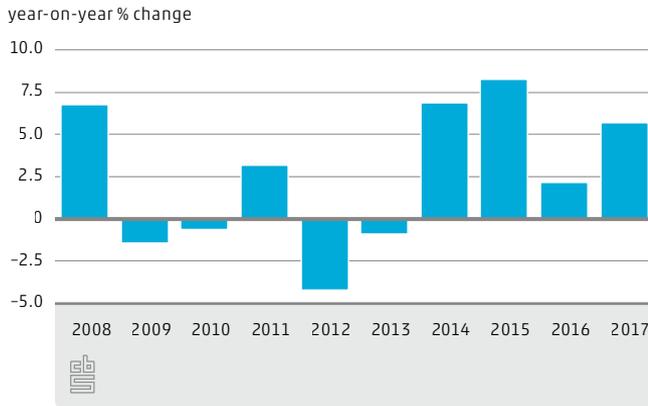
climate. Expectations of turnover and sales prices show a more varied picture, but have nevertheless increased every year since 2015. In the first quarter of 2018, business service providers were especially positive about sales prices and rates for the next three months.

In the period 2015–2017, turnover increased in virtually all branches of business services. The one exception was security and investigative services, which reported a slight downturn in turnover for 2016. The following year, however, their turnover recovered. Cleaning companies, gardeners, and architectural and engineering firms also achieved greater turnover in 2017 than in the two preceding years. Turnover in the travel sector saw the most impressive gains, especially in 2015 and 2016.

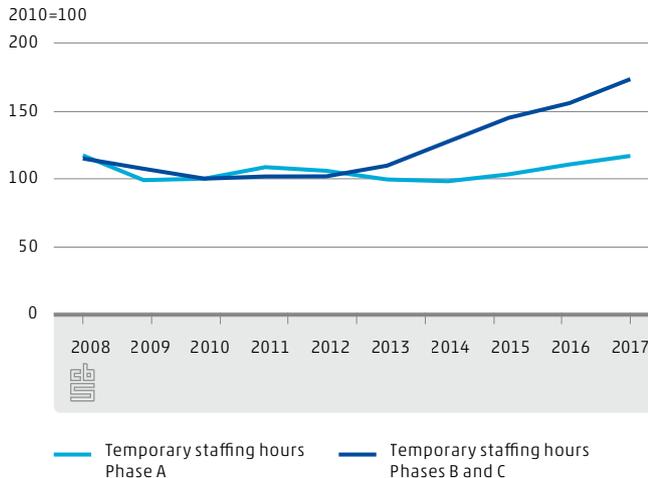
2.16 Turnover in business services per sector



2.17 Turnover of IT service providers



2.18 Temporary staffing hours



The turnover of IT service providers rose by 5.7 percent in 2017 compared to the previous year. This level of growth was higher than the average for 2016, but down on 2014 and 2015. The decline in turnover was most significant in 2012 (4.2 percent). IT services cover computer programming and consulting services, as well as information services such as web hosting, delivery of software applications and IT infrastructure.

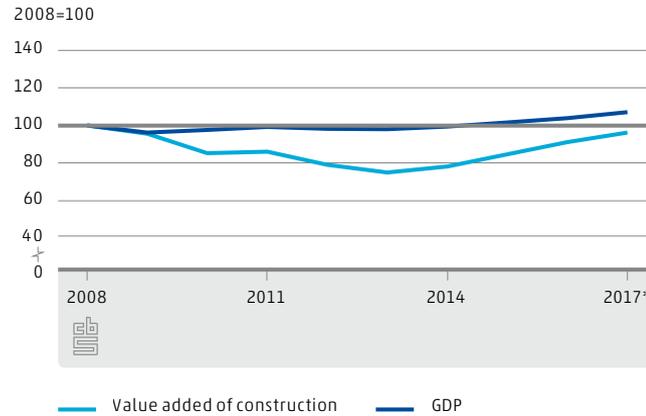
The turnover of temporary employment agencies has been on the rise for several years, corresponding with the increase in the number of temporary staffing hours. The number of temporary staffing hours in long-term contracts, such as secondment and payrolling (phases B and C), has increased almost continuously for six years. These are longer contracts in which temporary employees are taken on by the temporary employment agency for a fixed or an indefinite period. The number of hours in short-term contracts (phase A) only began to increase continuously from 2015 onwards. These are so-called basic contracts without a temporary employment clause, which last a maximum of 78 weeks.

Construction and housing

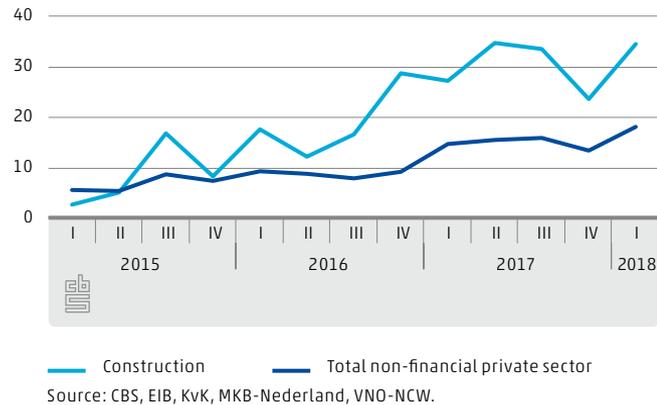
Construction is one of the fastest growing sectors of the Dutch economy. Growth in 2017 came to 5.6 percent compared to 2016. At the end of 2017, the added value of construction was 35 percent higher than the low point in early 2013. However, pre-2008 levels have not yet been attained, even though the gross domestic product (GDP) has been higher since early 2015 than it was before the crisis.

At the start of the first quarter of 2018, the confidence of entrepreneurs in the construction sector was 34.5. In other words, confidence bounced back after a decline in the previous quarter. Entrepreneurial confidence in construction made it the most positive of all sectors for the sixth quarter in a row. In 2013, construction had been the sector with the most pessimistic outlook.

2.19 Gross value added of construction and GDP

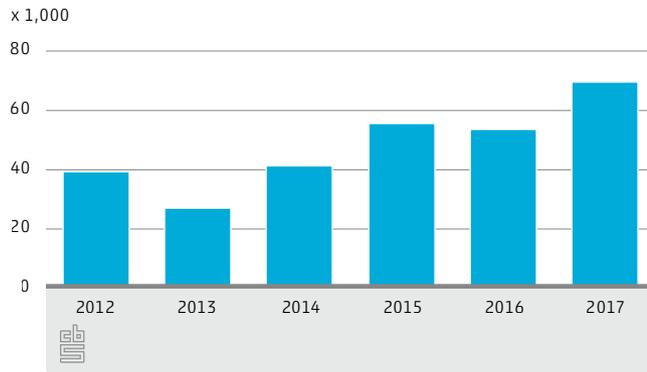


2.20 Entrepreneurial confidence

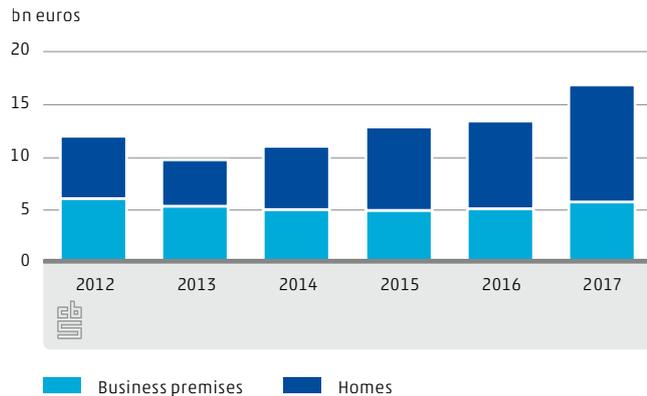


Source: CBS, EIB, KvK, MKB-Nederland, VNO-NCW.

2.21 Building permits issued for new homes



2.22 Construction costs associated with issued building permits



The entrepreneurs are positive about developments in production and anticipate further growth in employment. However, construction companies are having difficulty finding workers. Almost one in five entrepreneurs in the construction industry indicate that the shortage of suitable labour impedes their production.

In 2017, building permits were issued for nearly 70,000 new homes. That is 30 percent more than in 2016. This is approaching the numbers being issued before the economic crisis. Between 2000 and 2008, permits were granted for an average of around 80,000 new homes to be built each year. The number of permits issued to construct new residential properties is an indicator of what will be built in the near future. The average lead time from permit to completed new home is two years.

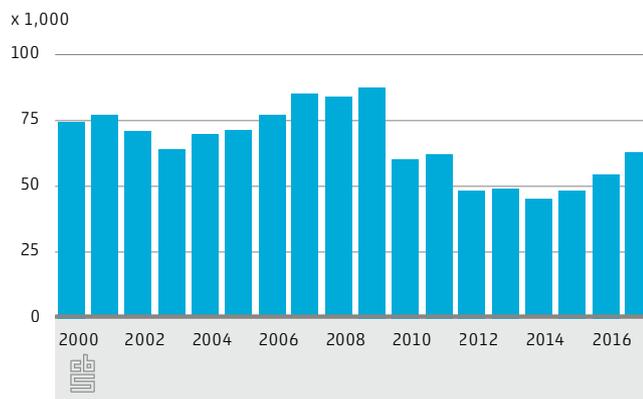
The cost of the construction and renovation of homes was in excess of 11 billion euros, 34 percent up on 2016. For business premises, construction costs rose by 13 percent to over 5.8 billion euros. Total construction costs in connection with newly issued permits reached almost 17 billion euros, the highest figure since 2012.

The construction costs associated with each permit issued are determined by estimating the value of the materials and labour costs involved in the construction contract. Only building permits of 50,000 euros or above are included in this statistic.

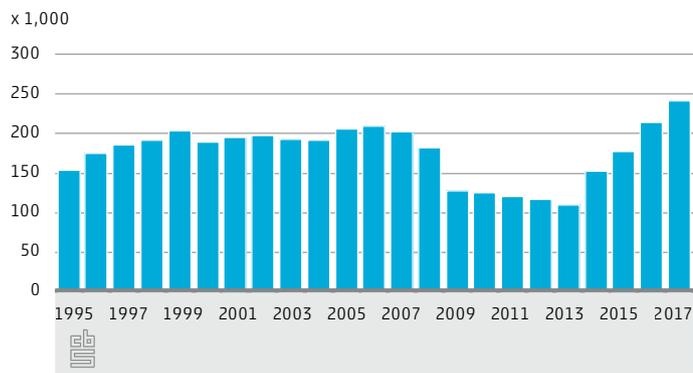
Nearly 63,000 new homes were added to the housing stock in 2017. That is almost 15 percent more than in 2016 and the highest figure since 2009. The total stock on 1 January 2018 consisted of over 7.7 million homes.

Between 2000 and 2009, an average of over 76,000 new homes were added to the stock each year. Since 2010, this number has declined considerably. The low point came in 2014, when only 45,000 new homes were delivered. Despite

2.23 New build homes

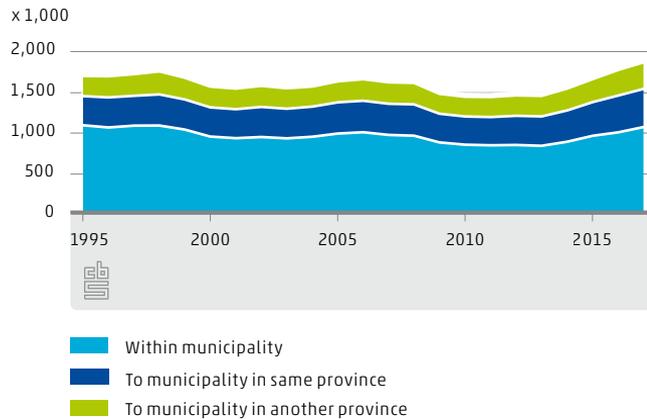


2.24 Home sales



Source: CBS, Kadaster.

2.25 Persons moved



the increase since 2014, the number of new build homes in 2017 was almost 20 percent down on the average for the period 2000–2009.

In 2017 too, more houses changed ownership than in the previous year. A total of almost 242,000 existing owner-occupied houses were sold. This is the highest number since 1995 and represented a record amount of almost 64 billion euros. At the low point in 2013, just over 110,000 existing homes were sold, less than half the number sold in 2017.

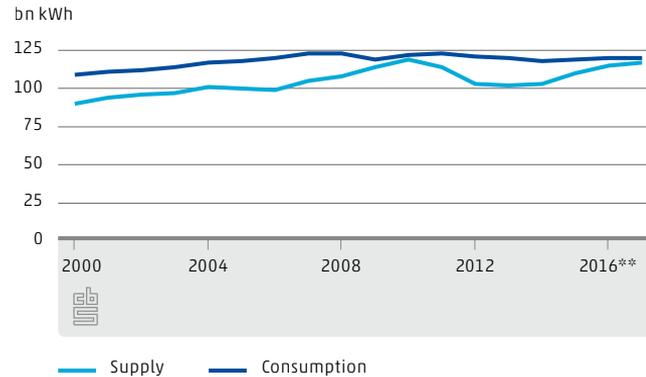
In 2017, almost 1.9 million people moved home in the Netherlands, over 420,000 more than in 2010. The largest proportion, almost 58 percent of moves, took place within the same municipality. Nearly 25 percent of those who moved went to live in a municipality in the same province, while 17 percent moved to another province.

Energy

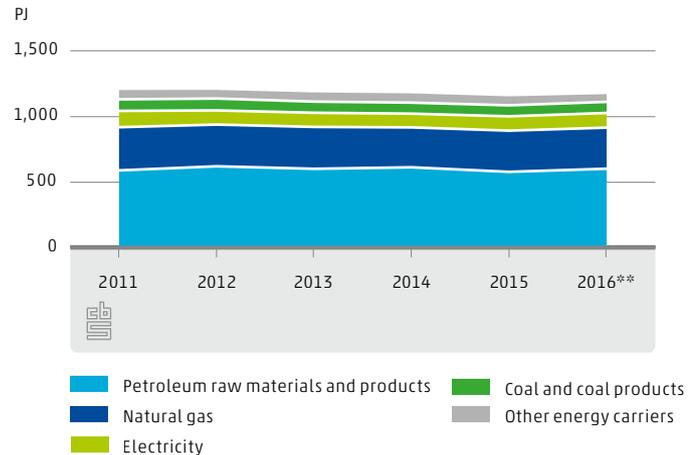
Electricity consumption in the Netherlands has fluctuated around 120 billion kWh since 2006, peaking at over 123 billion kWh in 2008. Due to a number of factors, most notably the financial crisis of 2008, the limited economic growth that followed, and the savings made by new energy-efficient appliances, that level of consumption has never been reached since. Electricity is supplied by both domestic and foreign producers.

In 2016, energy consumption in the industrial sector increased by 1.5 percent compared to 2015. Both developments in industrial activities and efficiencies in energy consumption influence consumption of energy carriers. In recent years, industrial energy consumption has decreased, due primarily to the introduction of more energy-efficient production processes. Approximately half of the energy is generated using petroleum raw materials and products. The chemical and pharmaceutical sectors combined account for 63 percent of industrial energy consumption.

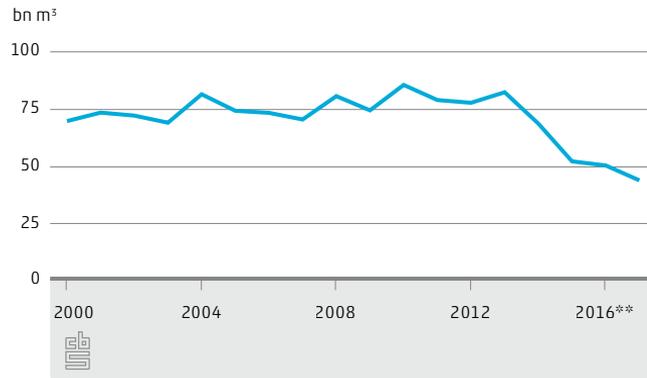
2.26 Electricity supply and consumption



2.27 Industrial energy consumption



2.28 Natural gas extraction from soil



2.29 Coal consumption



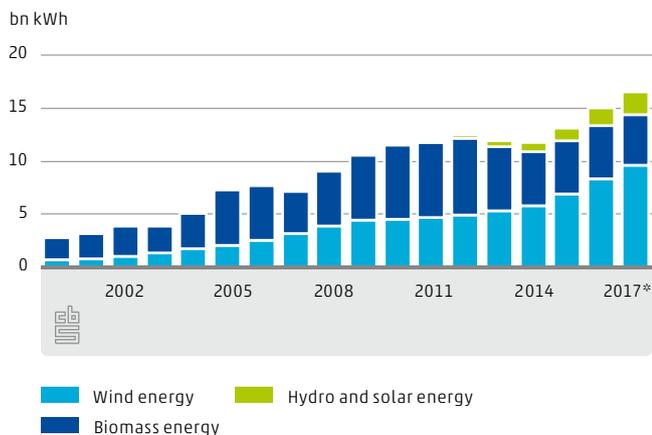
Natural gas production has fallen dramatically since 2013. Due to the safety risks associated with earthquakes caused by gas production in Groningen, the production ceiling has gradually been scaled back. In 2017 only 44 billion cubic metres of natural gas was extracted, almost half the amount in 2013. With less gas being extracted, the government's natural gas revenues have decreased. Profits have come under further pressure due to the price of natural gas, which was lower in 2016 and 2017 than in preceding years for large-scale users.

Coal is used for the production of electricity, iron and steel. Coal consumption for electricity production increased sharply up to and including 2015 as new coal-fired power stations were gradually brought into service. Partly due to the decommissioning of three old coal-fired power stations at the end of 2015 and two in mid-2017, consumption in 2016 and 2017 once again fell by a quarter (to 10.2 billion kg). Coal consumption for iron and steel production has remained reasonably stable at around 4.5 billion kg, except for a dip in the years after the financial crisis of 2008.

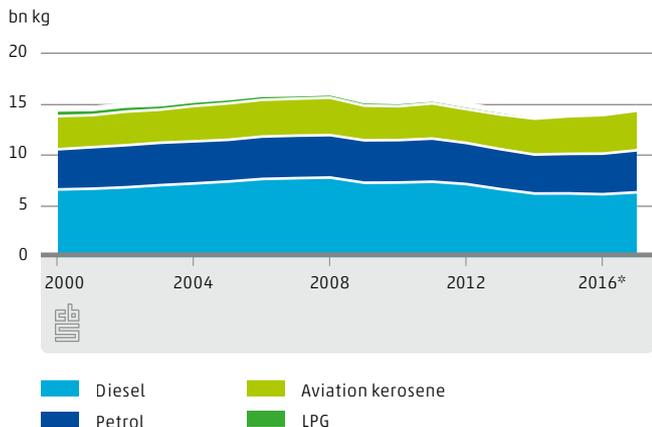
In 2017, 10 percent more electricity was generated from renewable sources in the Netherlands than in the previous year: 17 billion kilowatt hours (kWh) compared to 15 billion kWh in 2016. Wind turbines generated the largest share of this total, with 58 percent, followed by biomass with 29 percent. Almost 13 percent was generated by solar panels, while the share of hydropower was limited to 0.5 percent. Wind and solar energy production is increasing year by year, while the contribution made by biomass is on the decline. The share of total electricity consumption covered by sustainably generated electricity increased from 12.5 percent in 2016 to 13.8 percent in 2017.

The consumption of motor fuels for road traffic rose once again in 2017 to reach 10.7 billion kg. More petrol in particular was consumed, a rise of 3.5 percent on 2016. Diesel sales also show an upward trend once again after years of decline, up 3 percent on 2016. LPG appears to have fallen out of favour for good, with consumption hitting 148 million kg, its lowest level ever. Compared to five years ago, the consumption of LPG has halved. Consumption of kerosene for international air traffic rose by

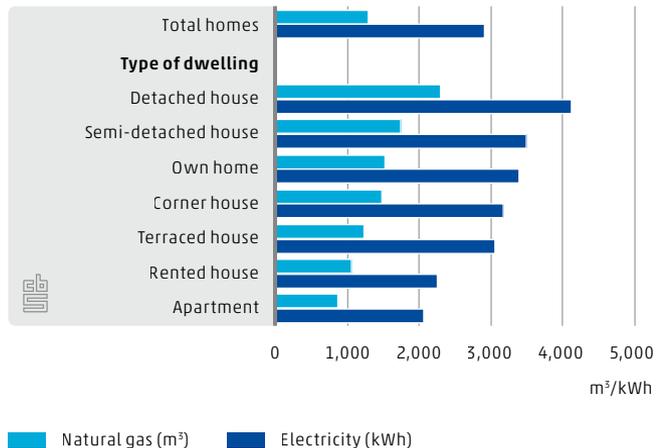
2.30 Renewable electricity production



2.31 Motor fuel consumption



2.32 Natural gas and electricity consumption, 2016



2.8 percent compared to 2016 to reach a record high.

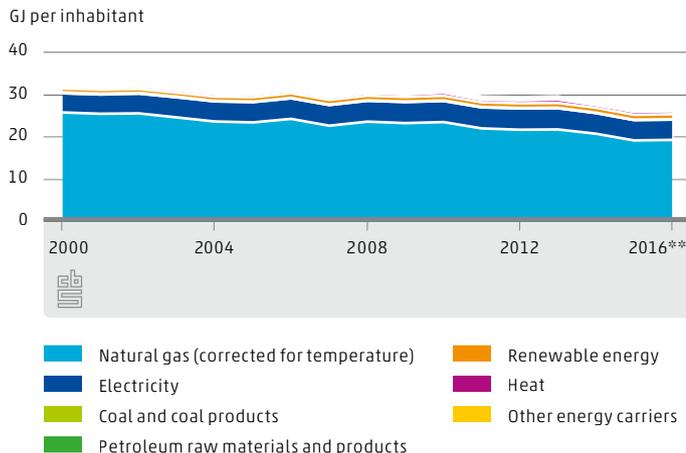
In 2016, an average Dutch household consumed 1,300 cubic metres of natural gas for heating. There are major differences between various types of housing as regards the annual consumption of natural gas. The annual natural gas consumption of a detached house, for example, is 2.6 times higher than consumption for an apartment. The average electricity consumption per home in 2016 exceeded 2,900 kWh. Electricity consumption also depends on the type of housing. In apartments, electricity consumption is on average half of the consumption in detached houses: 2,070 kWh as opposed to 4,120 kWh.

The energy consumption per inhabitant dropped by 18 percent between 2000 and 2016, from 32.2 GJ to 26.4 GJ. Natural gas still accounts for the largest share of consumption: 75 percent, followed by electricity at around 15 percent. Renewable energy (4.5 percent) and heat (2.7 percent) mainly account for remaining consumption. Natural gas is mostly used for heating the home (80 percent) and

consumption fluctuates from year to year, depending on the severity of the winter. Electricity consumption is less prone to fluctuation and was almost 6 percent higher in 2016 than in 2000.

In 2017, the total energy consumption in the Netherlands amounted to 3157 PJ. The main energy carriers were natural gas with over 41 percent of the total, petroleum (almost 39 percent) and coal (12 percent). Slightly more than 8 percent comes from renewable sources, nuclear energy and waste. Natural gas originates mainly from the Netherlands and is used to generate heat and electricity. A large proportion of crude oil and petroleum products are imported, and then re-exported. Petroleum and petroleum products are used to produce fuels and products such as plastics.

2.33 Household energy consumption



Energy consumption by energy carrier, 2017

8.2%
Renewable
and other

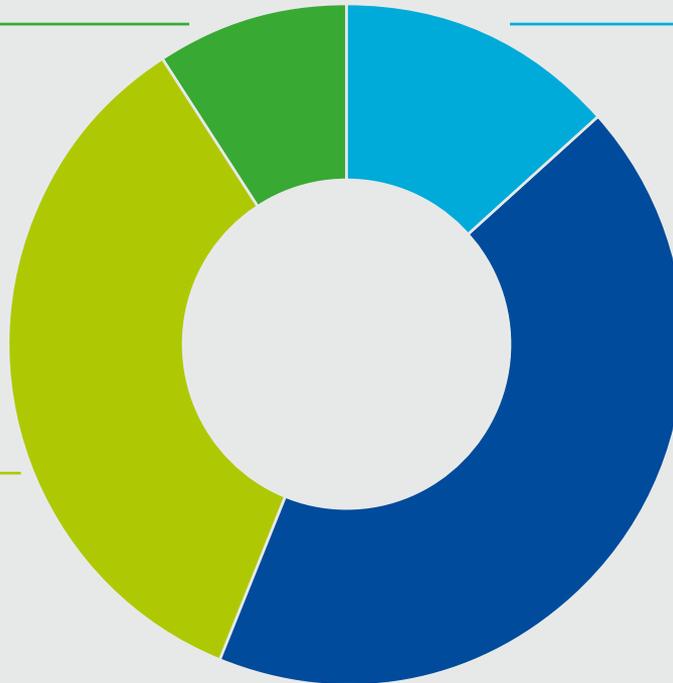


12.1%
Coal and
coal products

41.2%
Natural gas



38.5%
Crude
petroleum

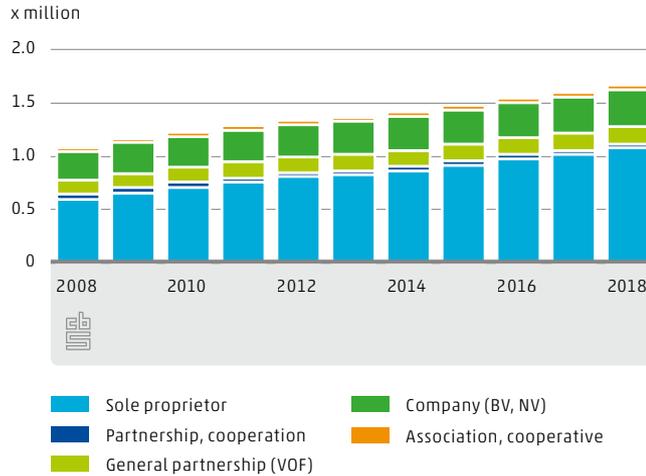


Enterprises

The number of companies has risen continuously in recent years, with the biggest increase in sole proprietors. In the second quarter of 2018, two out of three companies were sole proprietors, in 2008 that figure was just over half. As a legal form, the partnership is becoming less common among companies.

As in previous years, management consultancy firms accounted for most of the new enterprises founded in 2017, almost 13,000 in total. In addition, starters often set up a company in the education sector (e.g. almost 3,500 start-ups in sports education) or in tutoring or coaching (3,000 start-ups). Retail is also high on the list of start-ups, mainly thanks to the strong increase in the number of new webshops.

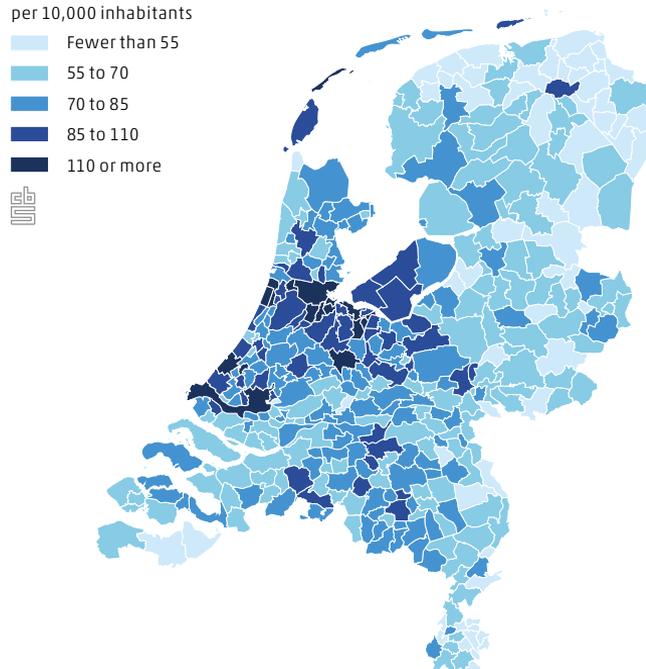
2.34 Companies, Q2



2.35 Sectors with most start-ups, 2017



2.36 Locations of start-ups, 2017



Many new companies also emerged in the arts sector. In outpatient healthcare, starters are mainly to be found in paramedic practices, among them dieticians, opticians, podiatrists, healthcare assistants and nurses (not home care).

The municipalities where most start-ups set up business are mainly located in and around the Netherlands' four largest cities. With 187 businesses founded per 10,000 residents, the City of Amsterdam had the highest number, followed by Laren (164) and The Hague (134). Of the 20 municipalities with the fewest new start-ups, 18 are located on the Netherlands' eastern or northern border. With 35 new businesses for every 10,000 residents, Loppersum and Appingedam are bottom of the table for start-ups established in 2017.

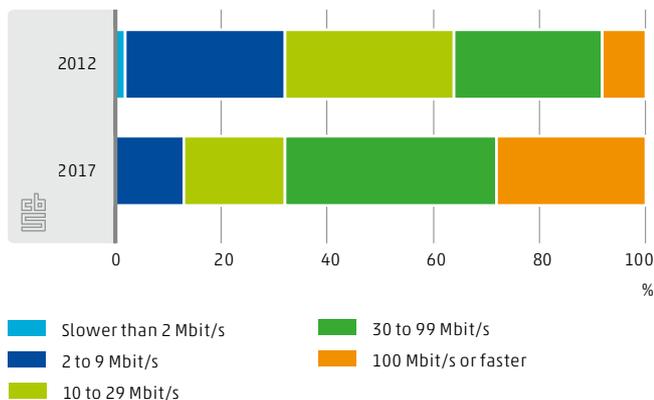
The percentage of companies with a minimum of 10 workers and a fast, fixed internet connection of at least 30 Mb/s rose from 36 percent to 67 percent between 2012 and 2017. Growth in the number of companies with an internet connection of 100 Mb/s or more was especially pronounced; from 8 percent (2012) to

28 percent (2017). The proportion of companies with a slow internet connection (less than 10 Mb/s) decreased by over half in the same period.

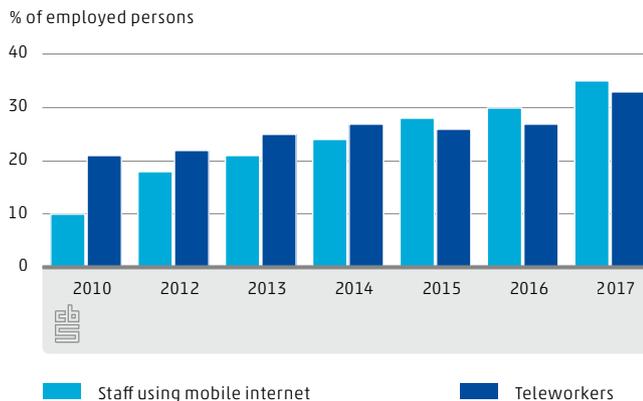
An increasing number of employees are taking advantage of teleworking opportunities. In 2017, 33 percent of employees regularly worked outside their company location. Seven years earlier, only 21 percent of employees did so.

A similar trend can be seen in staff using mobile internet supplied by the business that employs them. In 2017, 35 percent of employees used company laptops, tablets or smartphones in order to gain online access. A significant increase compared to 2010, when this applied to only 10 percent of employees.

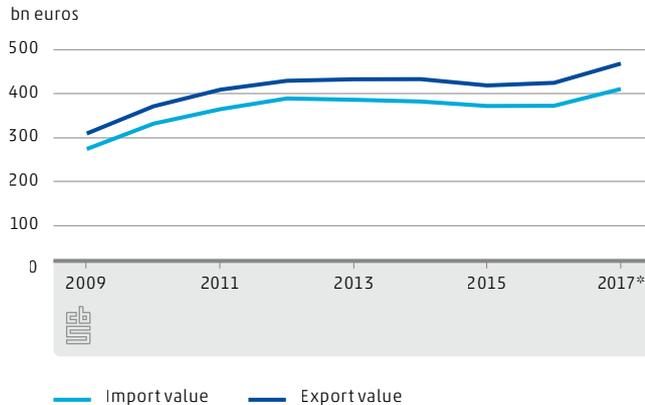
2.37 Speed of fixed internet connection at companies



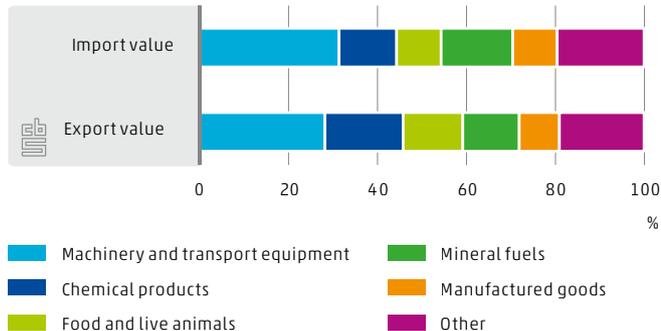
2.38 ICT usage by companies



2.39 International trade in goods



2.40 International trade in goods, 2017*



International trade

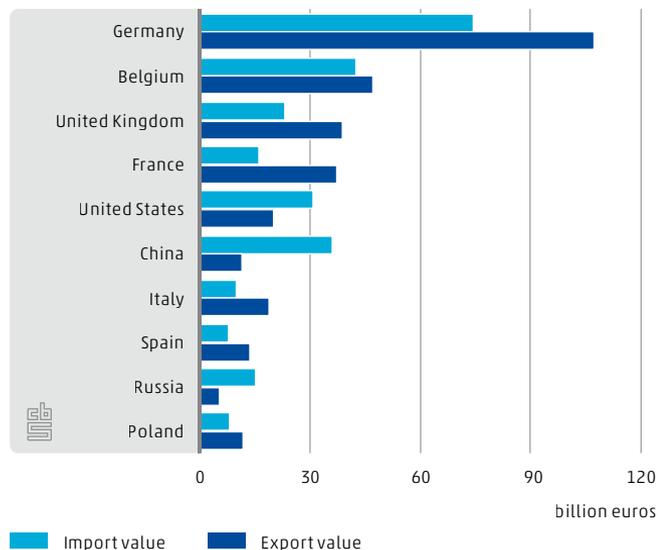
International trade in goods expanded significantly in 2017. Both the import and export value rose by 10 percent. The import value amounted to 411 billion euros, the export value to 469 billion euros. Since 2009, both the import and export value have risen by 50 percent.

Of the 411 billion euros' worth of goods imported by the Netherlands in 2017, one third came in the form of machines and transport equipment. Mineral fuels accounted for 16 percent and chemical products for 13 percent. As regards the value of goods exported (469 billion euros in 2017), machines and transport equipment also represented the highest proportion, at 28 percent. Chemical products came in second with 17 percent.

Germany, Belgium and the United Kingdom were our most important trading partners in 2017, in terms of the value of goods imported and exported. This top 3 is the same if we focus solely on export value. Turning to import value, China occupies third place, behind Germany and Belgium. To the European countries in its top 10 trading partners, the Netherlands generally exports a higher value than it imports. The only exception to this is Russia. China, the United States and Russia are the only countries in the top 10 for which the value of the goods they export to the Netherlands is higher than that of the goods they import from the Netherlands.

Exports and imports of services to Germany in 2017 grew by 9 percent and 15 percent respectively, placing Germany above the United Kingdom on the list of Dutch trading partners. Germany also looks set to overtake the United States, which was the Netherlands' main trading partner in 2016. International trade in services covers both services exports (Dutch companies providing services abroad) and services imports (foreign companies providing services to the Netherlands).

2.41 Top 10 goods trading partners, 2017*



Top 3 trading partners in services, 2017

Import

€ 19.6
billion

Germany

€ 24.6
billion

United States

€ 19.8
billion

United Kingdom

€ 23.7
billion

€ 17.3
billion

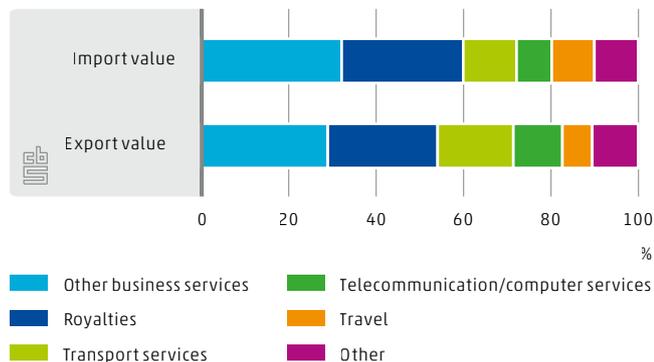
€ 21.7
billion

Export

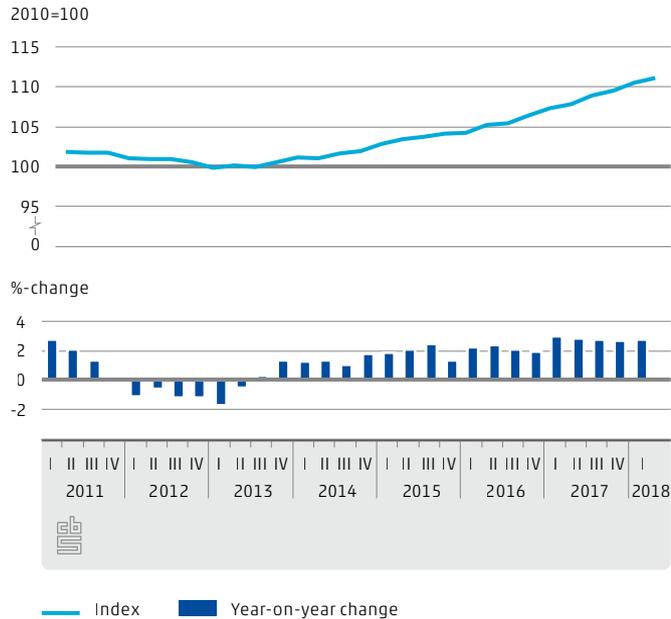
In 2017, 193 billion euros in services were exported and 187 billion euros in services were imported. For both exports and imports, this represents a rise of 12 percent compared to 2016. This growth comes primarily from the two main types of services: other business services (e.g. R&D services) and royalties (e.g. fees for the use of music). The import and export of services in these categories accounted for over half of the trade in services in 2017.

Exports of other business services increased by 16 percent to 56 billion euros, while exports of royalties rose by as much as 25 percent to almost 49 billion euros. The fastest grower in terms of imports were transport services (including aviation). Thanks to growth of 17 percent, almost 23 billion euros in transport services were imported in 2017.

2.42 International trade in services, 2017*



2.43 Size of the economy



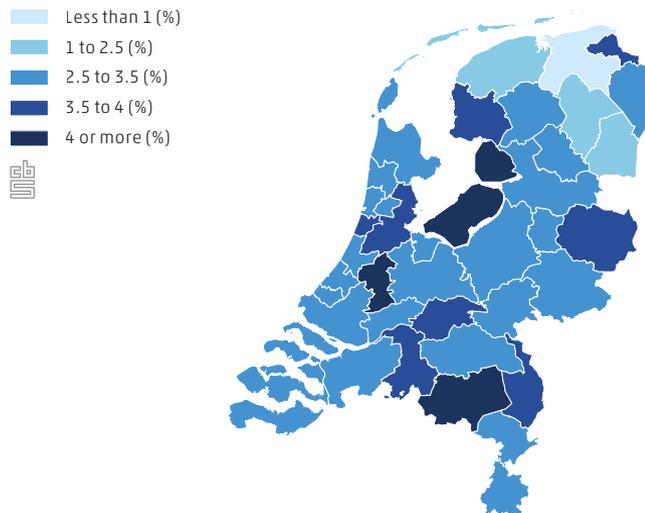
Macroeconomic

The Dutch economy grew by 2.9 percent in 2017, a level that is considerably more robust than in 2016 when economic growth stood at 2.2 percent. It also represents the highest level of growth since the crisis. Growth in 2017 is wide ranging. More has been invested, exported and consumed than in 2016. It was foreign trade, however, that remained the driving force behind the Dutch economy in 2017.

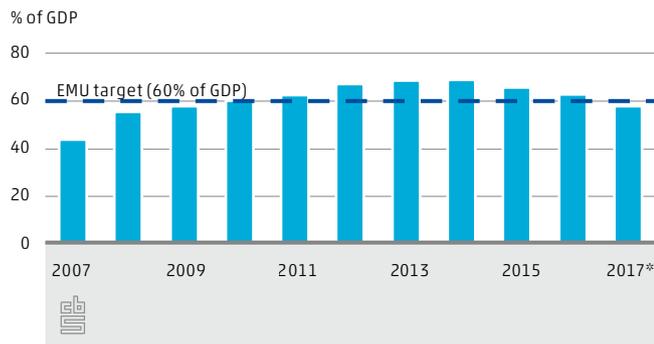
Economic growth in the Netherlands was reported in almost all regions. Economic shrinkage was only apparent in Groningen due to the decline in natural gas production. The economies of Friesland and Drenthe were also inhibited by developments in the natural gas sector. The strongest growth took place in Southeast North Brabant and Flevoland (especially in the city of Almere). Southeast North Brabant (Eindhoven and the surrounding area) thanked its growth to industry and business services. In Almere the economy picked up due to strong economic growth among lease companies.

For the first time since 2008, Dutch government finances are back in line with European standards. At the end of 2017, the national debt amounted to 421 billion euros or 57.1 percent of gross domestic product (GDP). In 2016, this figure was 62 percent. European regulations state that the debt of countries in the euro zone must be below 60 percent of GDP.

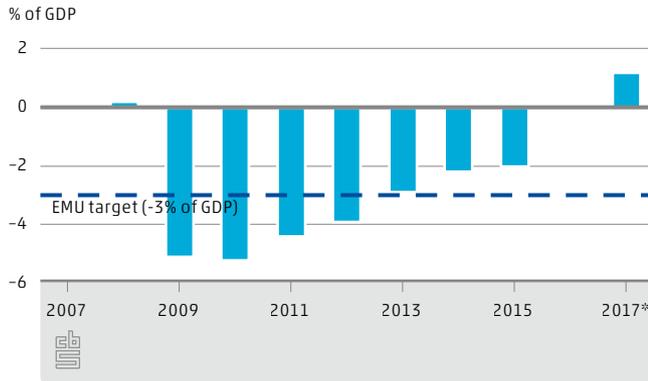
2.44 Regional economic growth, 2017*



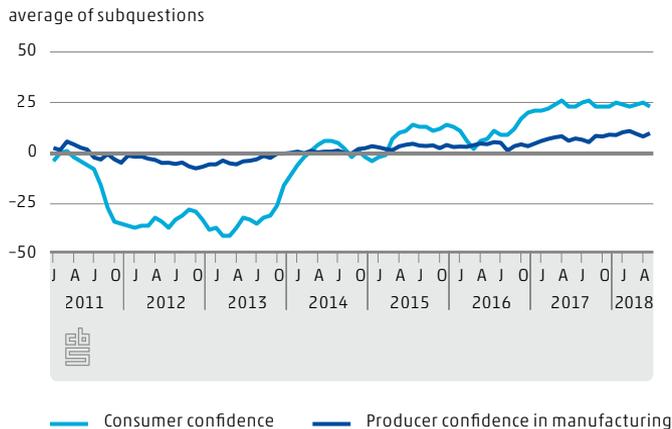
2.45 National debt



2.46 Government balance



2.47 Confidence (seasonally adjusted)



The balance of government revenue and expenditure was exceptionally high, at 9 billion euros. This represents 1.2 percent of GDP. The Netherlands has kept to the European deficit limit of 3 percent since 2013.

Consumer confidence slipped a notch in May 2018 (down 3), but is still well above the average over the past twenty years. For the past year consumer confidence has been fluctuating between 23 and 26. Producer confidence was also up in May 2018, after sliding in March and April. Producer confidence remains well above the average of the past twenty years (0.8). In May 2018 producers were more positive about expected activity than in the previous month.

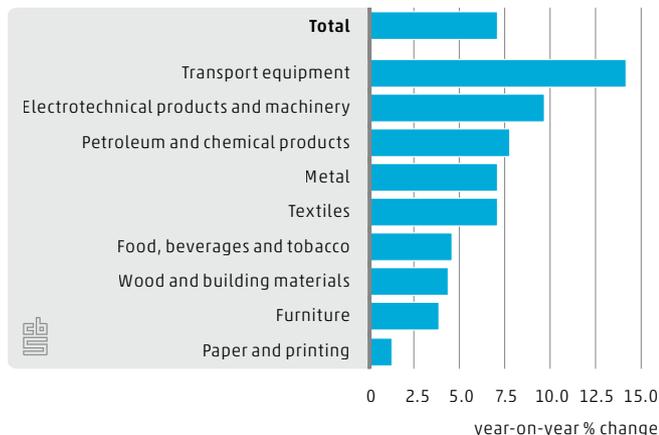
Manufacturing

In Q4 2017, turnover in the industrial sector rose by 6.1 percent year on year. It was the fifth quarter in a row to show growth. For 2017 as a whole, industry achieved an increase in turnover of 7.1 percent. Turnover increased in all industrial sectors, but was strongest in transport with a rise of 14.2 percent.

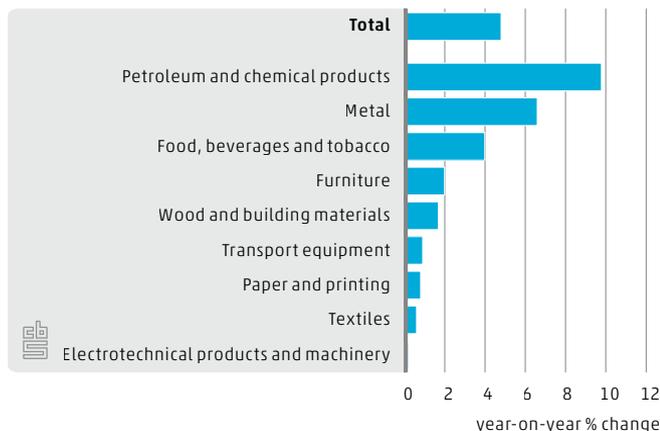
Output prices in industry were 2.8 percent higher in Q4 2017 than at the end of 2016. This rise was seen both in the Netherlands and abroad, with increases of 2.4 percent and 3.2 percent respectively.

Over the whole of 2017 there was an annual price increase of 4.8 percent in the industrial sector. With a price increase of almost 10 percent, the petroleum industry played a major role in these positive price developments. In all other areas of industry, prices also rose, although in the electrical engineering and machinery industries, for example, the increase was only 0.2 percent.

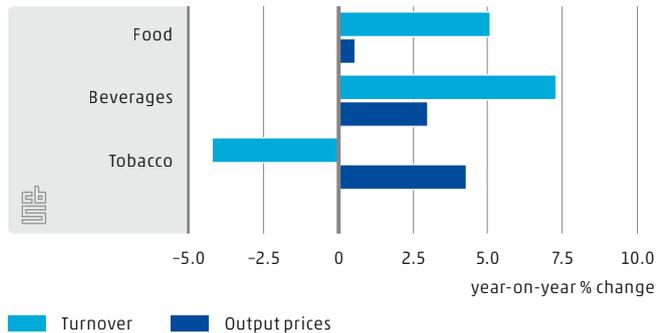
2.48 Turnover in manufacturing industry, 2017



2.49 Output prices in manufacturing industry, 2017

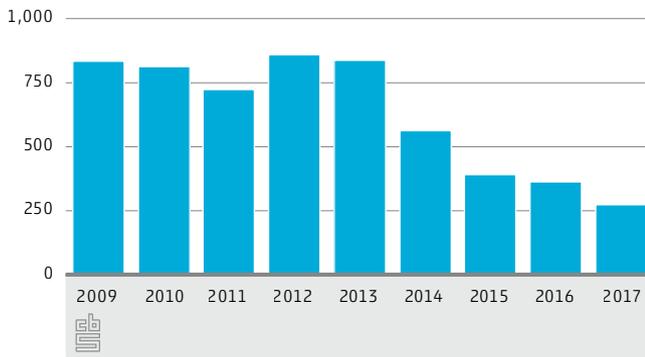


2.50 Food, beverages and tobacco industry, Q4 2017



In the food industry and the beverage industry, sales on both the domestic and international markets increased in the fourth quarter of 2017, while sales in the tobacco industry fell by 4.2 percent. Turnover in the food industry rose by 5.1 percent and in the drinks industry by 7.3 percent. Manufacturing output prices in industry rose across the board in the fourth quarter. The highest price increase (4.3 percent) occurred in the tobacco industry, rising more rapidly on the foreign market (4.7 percent).

2.51 Bankruptcies in manufacturing

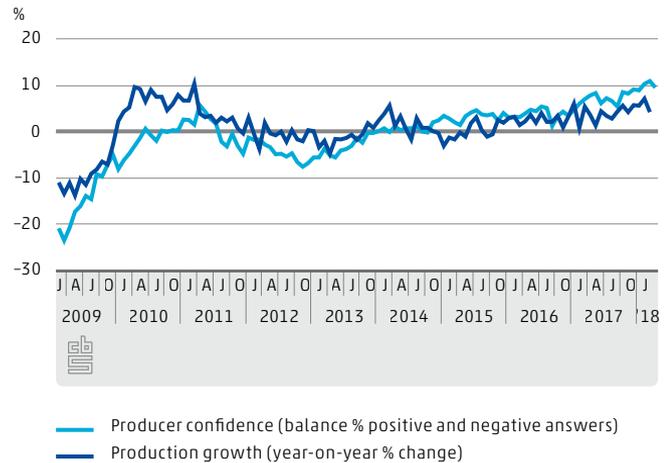


In 2017, turnover grew by 6.3 percent compared to 2016, with the quickest rise in the beverage industry. Turnover in the food industry rose by 4.5 percent and in the tobacco industry by 1.5 percent.

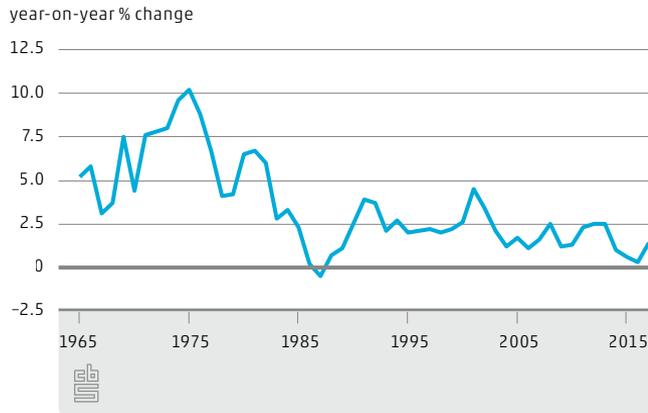
The number of bankruptcies declared in industry has fallen sharply since 2013. At the peak in 2012, 859 companies went bankrupt, while in 2017 the number dropped to 275. This is a fall of 68 percent compared to 2016.

Producer confidence in industry is well above the average for the past twenty years. Since October 2014, entrepreneurial positivity has prevailed. Producer confidence reached a record high of 10.9 percent in February 2018. In March 2018, producers were slightly less optimistic, with a confidence rating of 9.5 percent. Since October 2015, production has grown every month compared to the same period one year previously. In February 2018, production growth reached 4.2 percent.

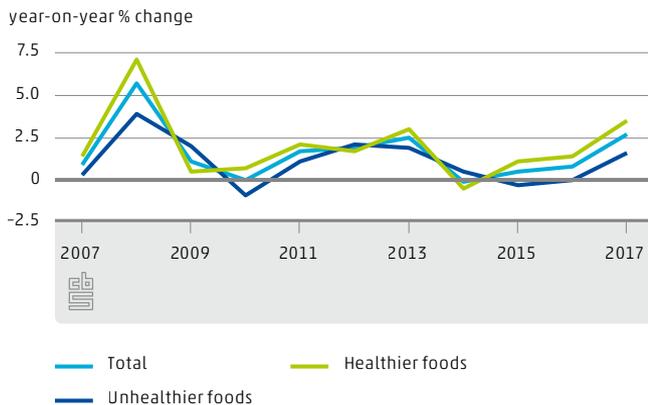
2.52 Producer confidence and production growth



2.53 Consumer prices



2.54 Food prices



— Total
 — Unhealthier foods
 — Healthier foods

Source: CBS, Voedingscentrum.

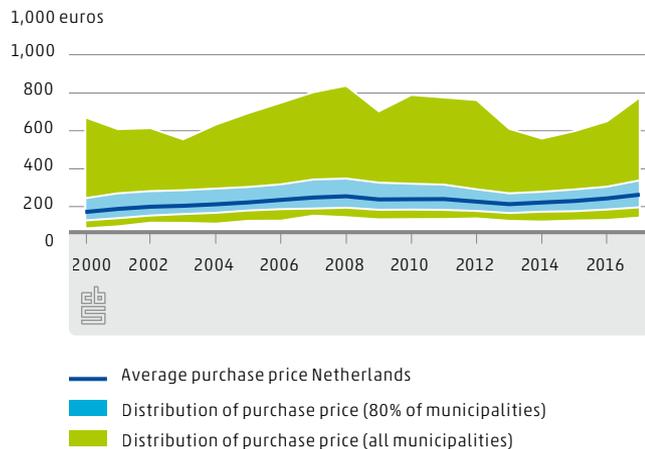
Prices

After three years of slight increases, there was once again a more substantial rise in consumer prices in 2017. On average, prices went up by 1.4 percent in 2017 compared to 2016. Goods were 1.5 percent more expensive on average, while the price of services was 1.2 percent above the level of 2016. The 0.3 percent price increase for goods and services in 2016 was the lowest in almost 30 years.

Food prices rose by a relatively high margin in 2017. Looking back on the period 2007–2017, only 2008 experienced a more significant rise in food prices. In 2017, the price of healthier foodstuffs, such as semi-skimmed milk and eggs, rose over twice as much as the price of unhealthier foods. The stronger price increase for healthier foods is not an isolated incident. In previous years too, the prices of healthier foods also rose by more than those of unhealthier foods.

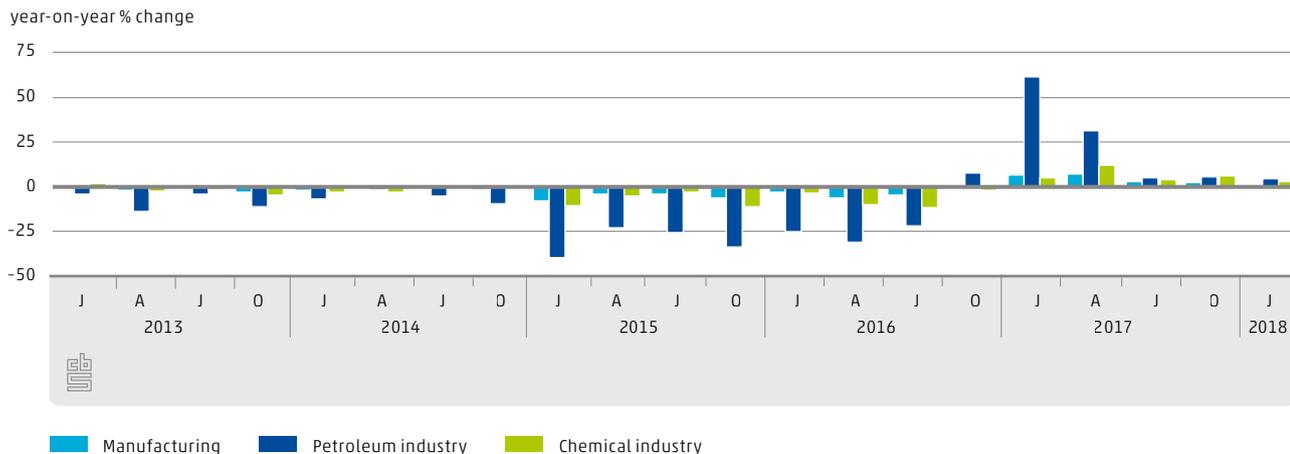
The average selling price of an existing owner-occupied home in the Netherlands rose to over 263,000 euros in 2017. As in previous years, people paid more for a house in Bloemendaal (776,000 euros on average) than anywhere else in the Netherlands. Home buyers in Delfzijl paid the least for their property: an average of 141,000 euros. Differences between municipalities were greater in 2017 than in 2016.

2.55 Selling price existing owner-occupied homes

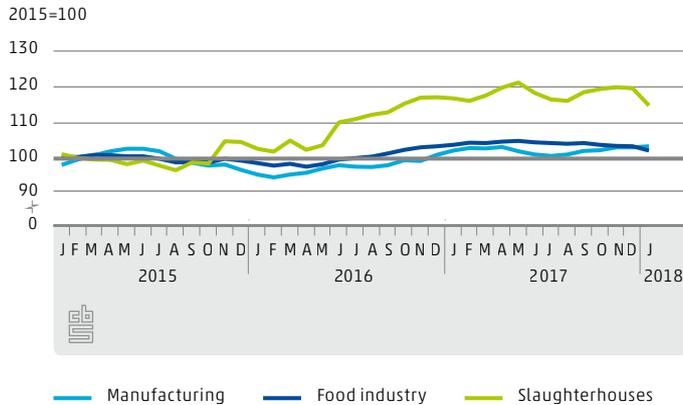


In January 2018, producer prices in industry rose by 1.2 percent compared to the previous year.

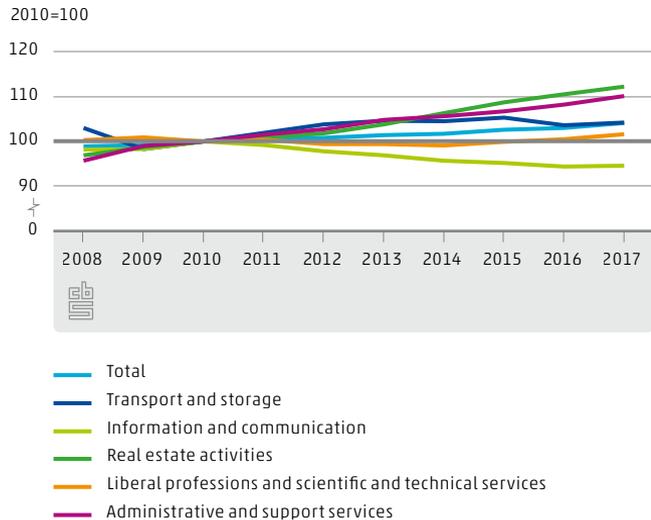
2.56 Producer prices in manufacturing



2.57 Producer prices food industry



2.58 Prices of commercial services and transport



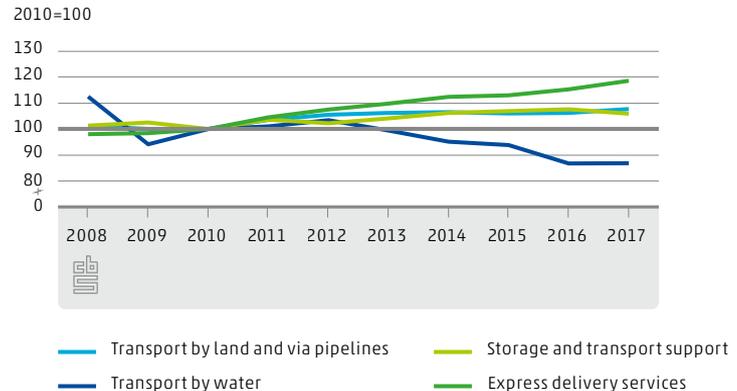
Prices went up in almost all sectors, less strongly at the end of the year than at the beginning of 2017. The petroleum industry largely determines the development of prices in both industry and the chemical sector. At the start of 2018, prices in the petroleum industry were 4.9 percent higher than they had been one year earlier. That was a much smaller increase than in the first quarter of 2017, when petroleum prices rose by 56 percent.

In January 2018, prices in the food industry were 2 percent higher than they had been in 2015. That is a more modest increase than for industry as a whole. Within the food industry, however, slaughterhouse prices rose sharply, by over 13 percent since 2015. This reflects a greater demand for meat in recent years and the increase in the price of animal feed.

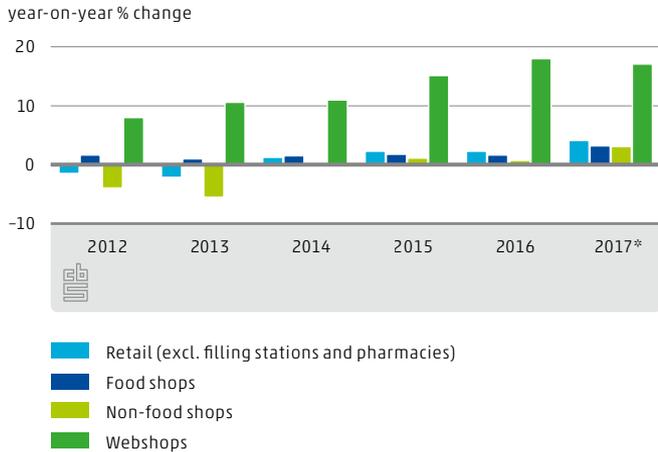
The prices of commercial services and transport have risen steadily in recent years. This also applies to most of the underlying branches. Operational costs and trade in real estate showed the most notable price rises. In this sector, average prices were 12.2 percent higher in 2017 than they had been in 2010. The prices of administrative and support services also rose. The only drop in prices was to be found in the information and communication industry.

Prices for services in the transport and storage sector have been on the rise for almost a decade. This trend was most striking in express delivery services, where prices rose by 18.6 percent in the period 2010–2017. However, the price of transport by water has fallen considerably in recent years.

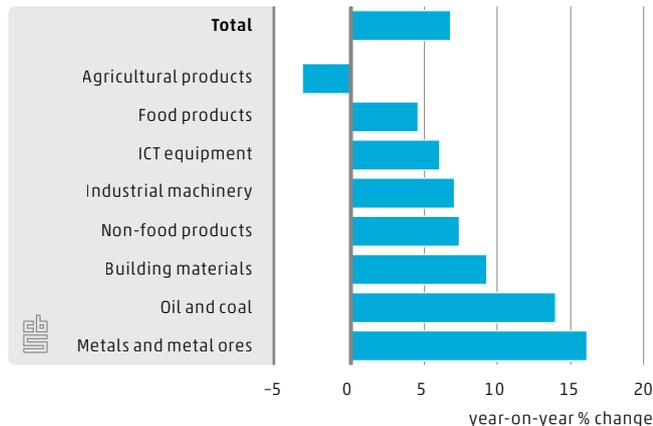
2.59 Prices of transport and storage services



2.60 Turnover in retail trade (adjusted for shopping days)



2.61 Turnover in wholesale trade, 2017

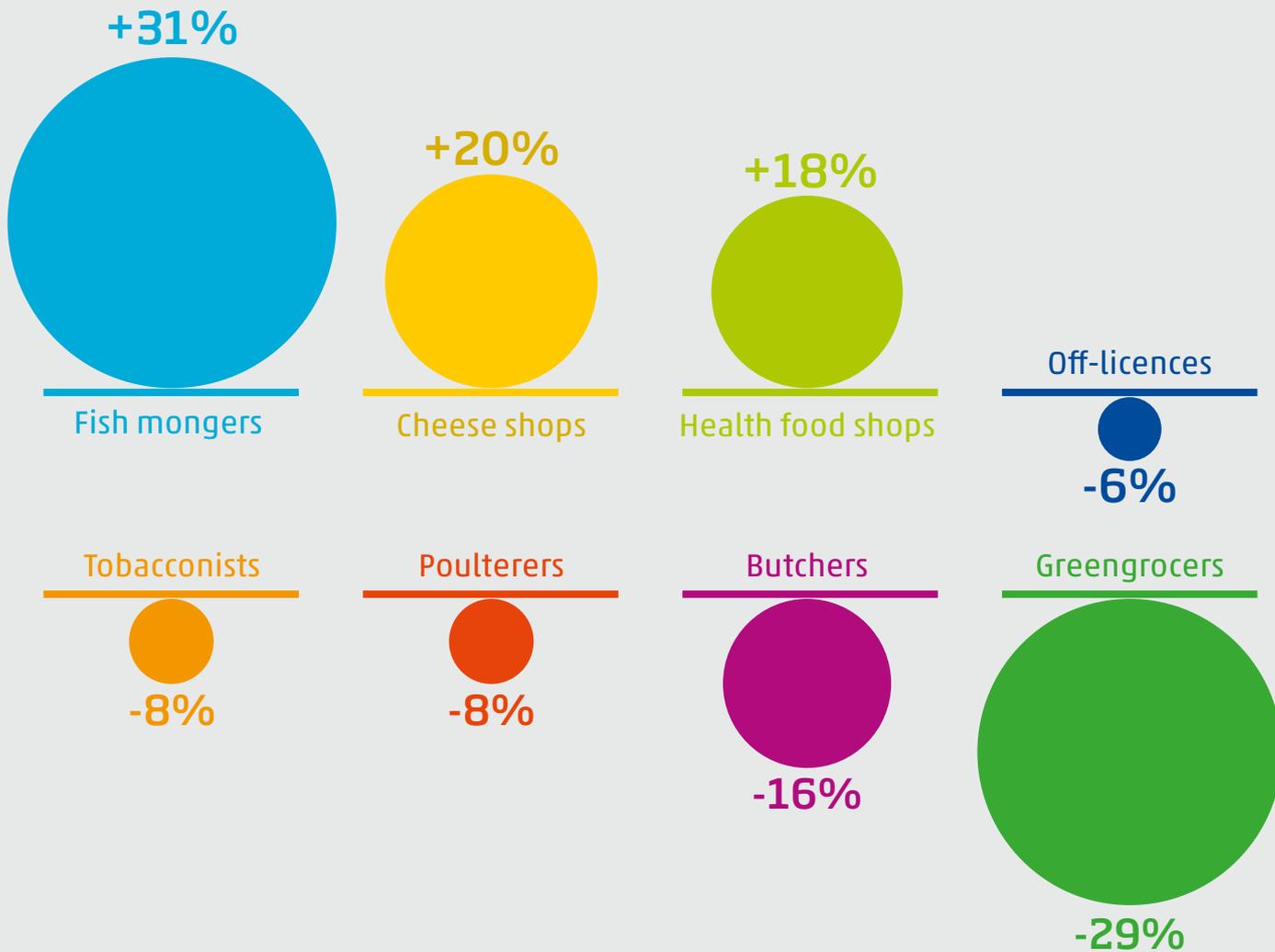


Trade, hotels and restaurants

Turnover in the retail trade increased by over 4 percent in 2017, its biggest growth in turnover since 2006. Sales were up over 3 percent. Turnover in both food and non-food stores grew in 2017. In the non-food sector, shops selling do-it-yourself items, kitchens, floors and furniture benefited most noticeably from the rebound in the housing market. Webshops generated 17 percent more turnover than in 2016.

The number of specialty food stores hardly changed between 2008 and 2017. However, there were significant changes per sector. For example, there was a 31 percent increase in the number of fish shops during this period. The number of cheese shops increased by 20 percent and the number of health food shops by 18 percent. Many greengrocers (29 percent), butchers (16 percent) and poulterers (8 percent) disappeared from the high street. There were also fewer off-licences (6 percent) and tobacconists (8 percent).

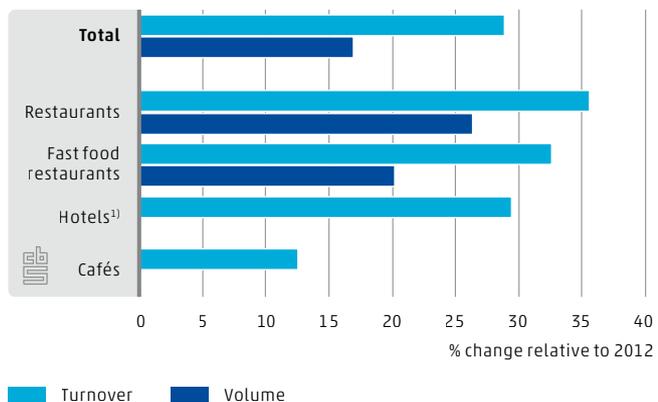
Development number of specialty food stores 2008-2017



2.62 Turnover in car and motorcycle trade



2.63 Turnover hotels and restaurants, 2017



¹⁾ Developments in volume not available for hotels.

The wholesale trade achieved a rise in turnover of almost 7 percent in 2017 compared to the previous year. Annual turnover was up in almost every sector. The exception was the wholesale trade in agricultural products, where sales tailed off by over 3 percent. Turnover rose fastest in the commodities trade. The rising oil price in the second half of 2017 and the recovery in the metals and ore market were the drivers behind this accelerated growth. The wholesale trade in building materials benefitted from the healthy annual climate for construction.

Turnover in the automotive and motorcycle sector increased for the third consecutive year in 2017. The passenger car industry (sales up by 7 percent) and the importers of new passenger cars (sales up by 6 percent) recorded the highest growth in turnover. In 2017 substantially more new passenger cars were sold than in the previous year. Only the commercial vehicle sector reported a contraction in turnover in 2017 after two years of significant growth.

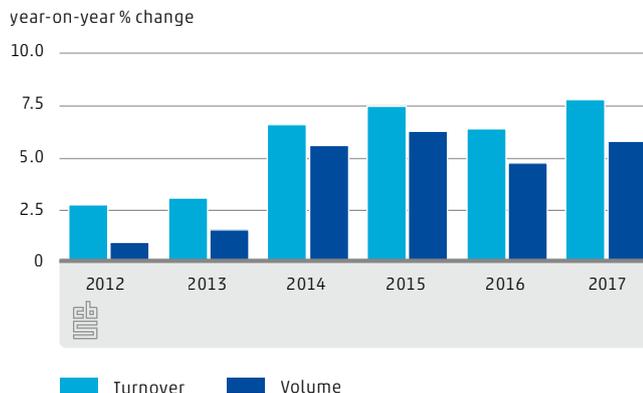
Between 2012–2017, turnover in the hotel and restaurant industry grew by 29 percent. The number of consumptions and/or overnight

stays (volume) was 17 percent higher than in 2012. Restaurants showed the sharpest rise in turnover, followed by fast food restaurants and hotels. Turnover for bars and cafés in 2017 was over 12 percent higher than five years earlier. This increase can mainly be attributed to price rises, as there was little change in the number of consumptions sold.

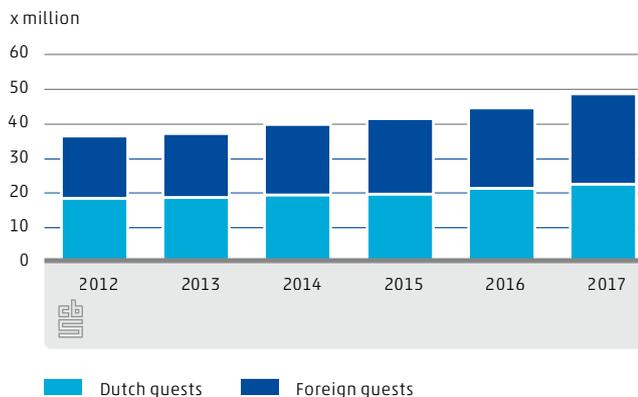
Turnover and the number of consumptions sold (volume) in restaurants have been increasing for seven years in a row. Restaurants reported record growth in turnover in 2017: nearly 8 percent compared to one year earlier. The number of consumptions sold increased by almost 6 percent.

The number of overnight stays in Dutch hotels rose by over 33 percent in the period 2012–2017. This growth is mainly due to the added influx of guests from abroad, who accounted for 46 percent more overnight hotel stays in 2017 than in 2012. Dutch guests booked 21 percent more overnight hotel stays. In 2017, foreign guests booked 26.1 million overnight stays in Dutch hotels, and guests from the Netherlands 22.6 million.

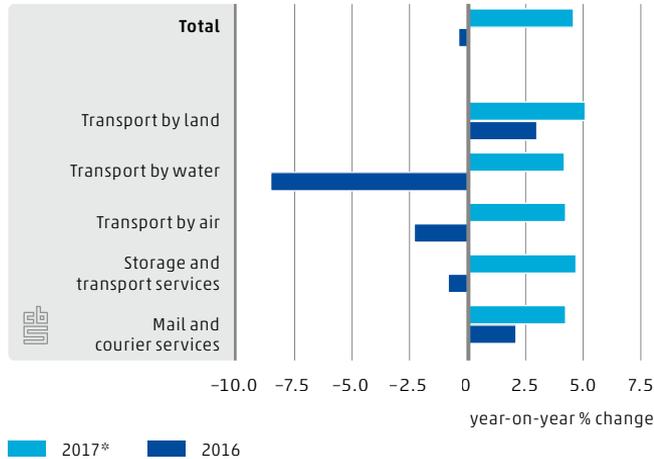
2.64 Turnover restaurants



2.65 Nights spent in hotel accommodation



2.66 Turnover in transport sector



2.67 Air freight transport

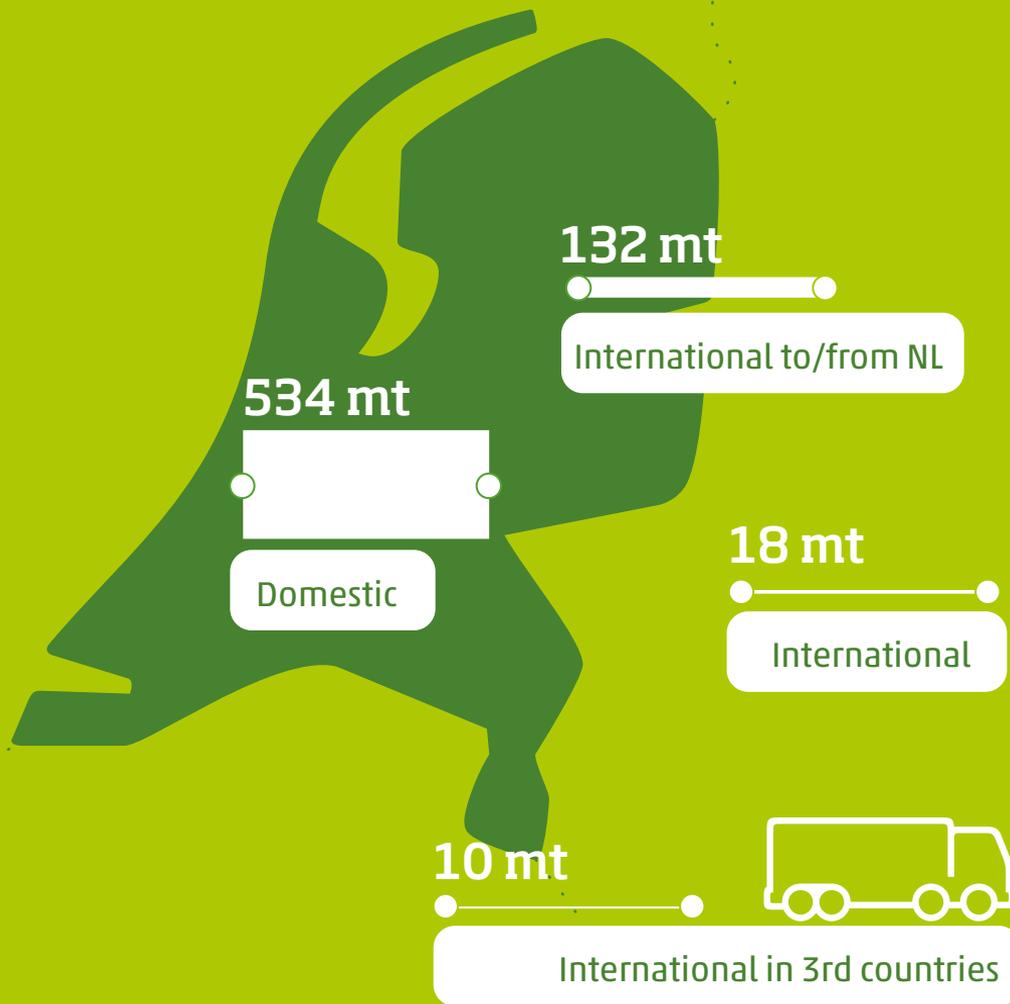


Transport

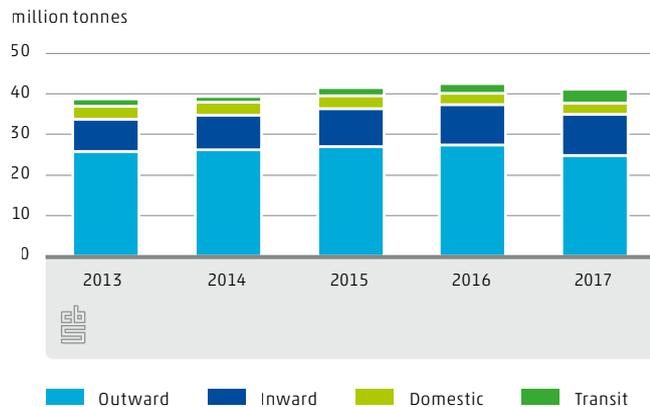
In 2017, Dutch lorries transported 1.5 percent more goods than they had one year earlier. A total of 666 million tonnes of goods arrived at their destination by road. More goods were transported, both within the national borders (a 1.1 percent increase) and in international road transport to and from the Netherlands (an increase of 3.5 percent). International road transport to and from the Netherlands, also known as bilateral transport, expanded again in 2017 after two years of contraction. Bilateral transport accounts for almost 80 percent of all international road transport carried out by Dutch lorries.

The transport sector generated 4.6 percent more turnover in 2017 than a year earlier. This was the largest increase in turnover since 2009. The freight brokers and road hauliers, the two largest branches of the transport sector, made a major contribution to this rise, with 6.2 percent and 6.1 percent revenue growth respectively. Courier services showed the strongest recovery, to achieve an increase in turnover of 6.9 percent.

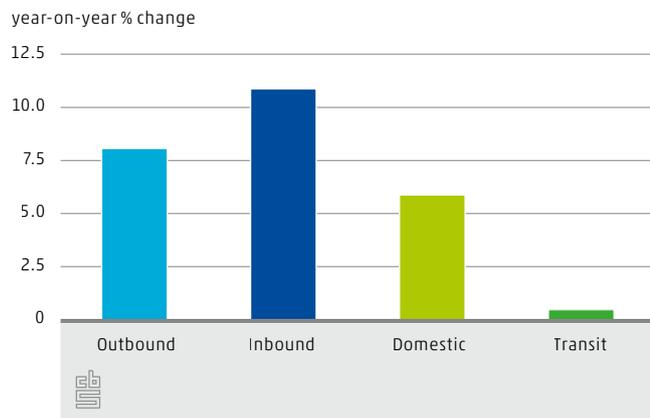
Transport by Dutch lorries in 2017



2.68 Rail freight transport



2.69 Weight of container goods carried by inland vessels, 2017



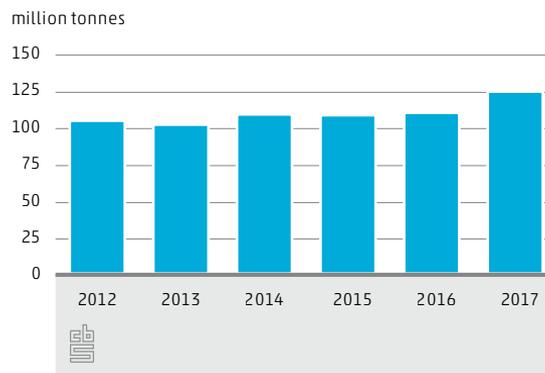
Airlines transported over 1.8 million tonnes of goods to and from the Netherlands in 2017. That is 6.8 percent more than in the previous year. Almost all air freight is routed via Amsterdam Airport Schiphol (95 percent). The remainder, a total of 87,000 tonnes, was transported solely via Maastricht Aachen Airport. China and the United States are the main partner countries for the Netherlands. Over 30 percent of all air freight goes to or comes from one of these countries.

Freight transport by rail took a tumble for the first time in 2017 after four years on the rise. The transported weight decreased by 3.3 percent to 41 million tonnes. This development was largely due to dwindling exports: the transported weight from the Netherlands to other countries fell by 9.1 percent. Rail imports to the Netherlands rose by 2.2 percent. Rail transport in which the Netherlands fulfils the role of transit country, experienced the greatest growth. Compared to 2016, the transited weight rose by 43 percent.

In 2017, inland vessels carried 366 million tonnes of goods, an increase of 1.2 percent on the previous year. This growth was mainly accounted for by container transport, with cargo weight increasing by 6.4 percent. The biggest increase was achieved in import and export. Almost 10 percent more container goods were transported to and from the Netherlands. In bulk transport, the mainstay of inland shipping with a share of 86 percent, the tonnages transported increased by a modest 0.4 percent in 2017. Bulk transport mainly takes the form of coal, ores, coke and refined petroleum products.

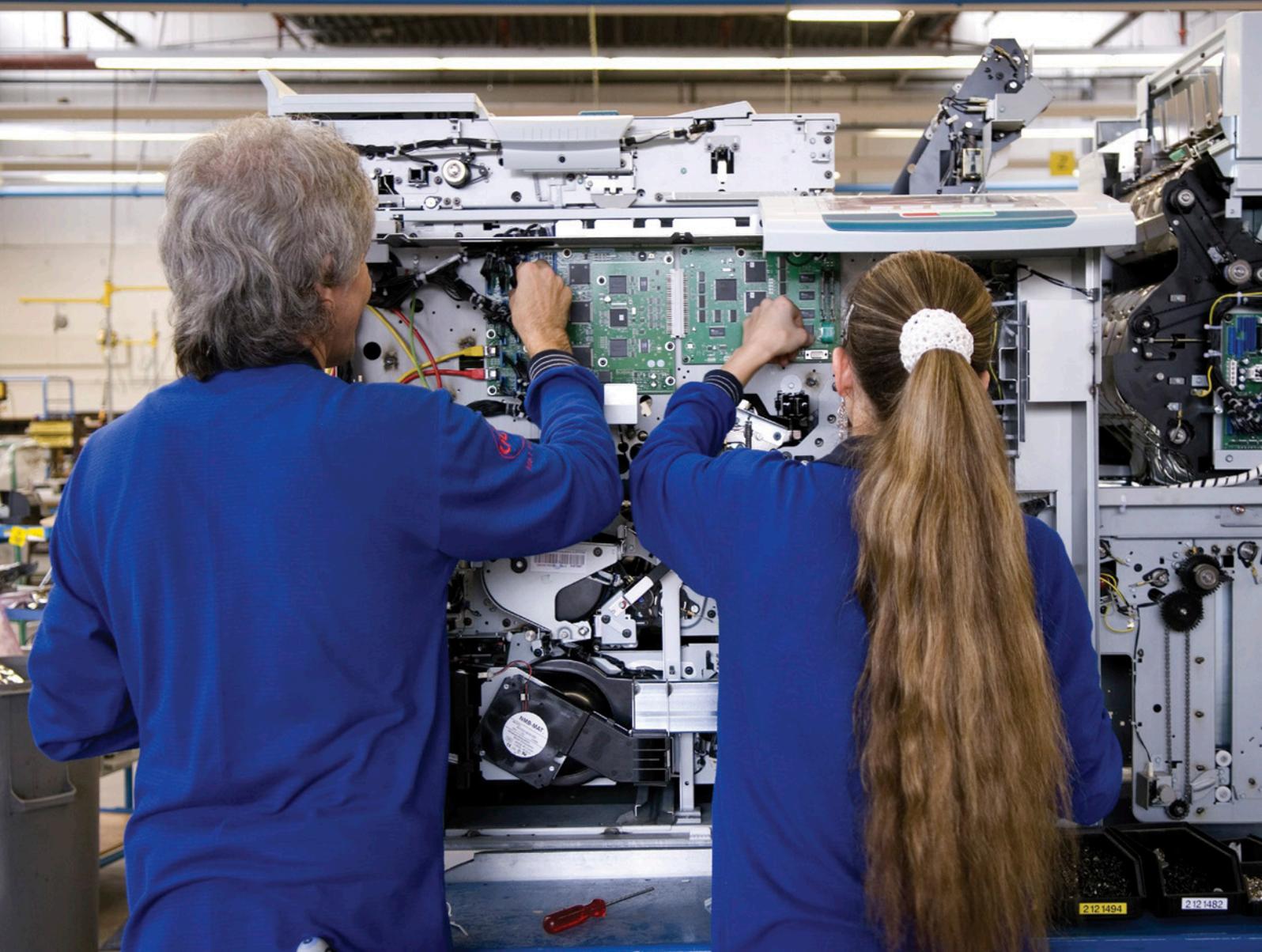
In 2017, a total of 596 million tonnes of goods were processed by Dutch seaports, 1.2 percent up on 2016. As with inland shipping, this growth was almost entirely accounted for by container transport. Compared to the previous year, in 2017 the transshipment of container goods increased by 13 percent to 124 million tonnes. Almost half (46 percent) of all transshipment in Dutch seaports consisted of wet bulk goods (primarily crude oil and petroleum products). The transshipment of these goods fell by 3 percent. Over three-quarters of all goods loaded or unloaded in Dutch seaports were handled in the Port of Rotterdam.

2.70 Transshipment of container goods at Dutch seaports



Note

The published weights for shipping do not include the unladen weight, for example, the weight of the container in which the goods are transported. Weights given for road transport, air freight, inland shipping and freight transport by rail do include all packaging, and the unladen weight of containers, swap bodies, goods pallets etc.



3. Labour and income

Trends

Employment levels still lower than before the credit crisis

In 2017, net employment – the number of people aged 15 to 74 years who are in employment – increased to 66.7 percent. Employment is still a little lower than before the credit crisis began: in 2008, the figure was 67.9 percent. Labour market participation fell after 2008, only picking up again in 2015. Net employment is an important economic and social metric. It is important to have high employment levels, not least to benefit household incomes and maintain the stability of government finances. On average, people in paid work are also happier than unemployed people. The number of hours worked is not factored into employment figures; everyone who does one hour or more of paid work per week is considered to be employed.

A variety of factors influence the development of the net employment figures among the population aged 15 to 74 years. There is a rising trend in the intention to work among women and over-55s, which is grounded in emancipation and government policy aimed at increasing employment. However, the economic reality can sometimes throw a spanner in the works. More people may want to work, but if not enough jobs are available the only metric that will rise is unemployment. Cyclical fluctuations cause discrepancies between the labour market participation of different demographic groups.

Women's employment level approaching that of men

Labour market participation is rising among both men and women, but the increase is more

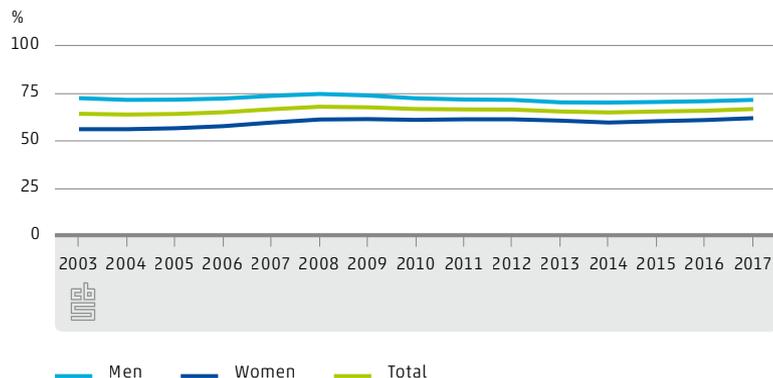
marked for women. The previous shortfall in women's employment compared to men's is gradually shrinking. In 2008, men's net employment was still 13.4 percentage points higher than that of women; by 2017, that difference had fallen below ten percentage points. In recent years, the difference has been reduced in all age groups. Among 15 to 24-year-olds, women's net employment is now in fact a little higher than that of men, as employment among young women grew much faster than employment among young men after 2014.

Employment in 2017 was lower than in 2008 in most age groups. The only groups to enjoy greater labour market participation than ten years ago were the over-55s and women aged 45 and older. Employment among people aged 55 to 64 years has been rising for some time, even continuing to increase during the credit crisis.

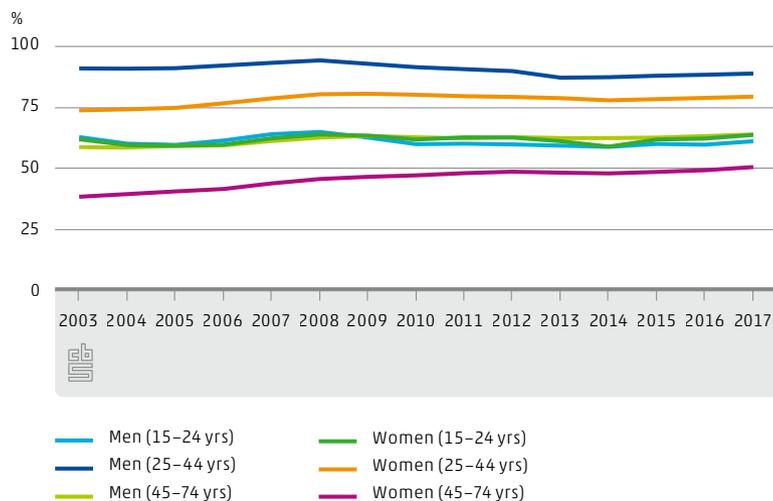
Relatively sharp fall in employment among people with Surinamese and Antillean backgrounds

The economic crisis that followed on the heels of the credit crisis was accompanied by

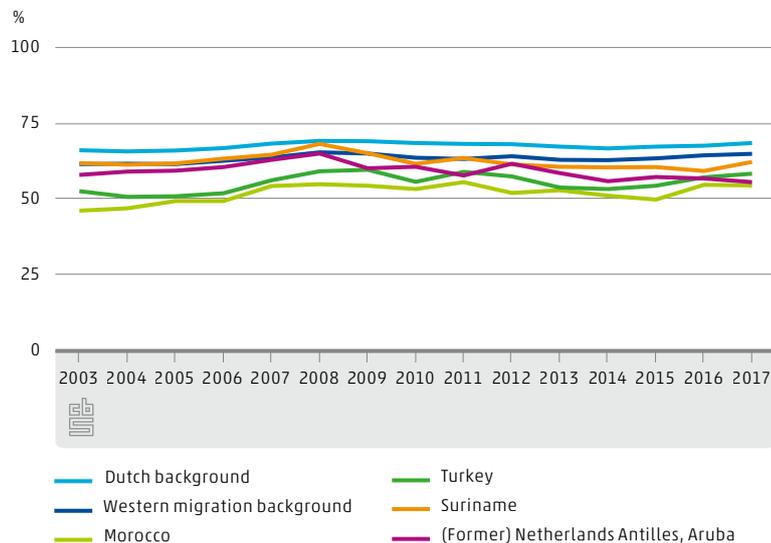
3.1 Net labour participation 15 to 74-year-olds



3.2 Net labour participation by sex and age



3.3 Net labour participation by migration background



significant changes in employment among all large groups with an immigrant background in the Netherlands. All these groups had lower levels of participation in the labour market in 2017 than in 2008. The difference in employment between people with a non-Western immigrant background and people with a Dutch background increased during the crisis. Before the crisis, this difference was actually decreasing, and that has again been the case in recent years.

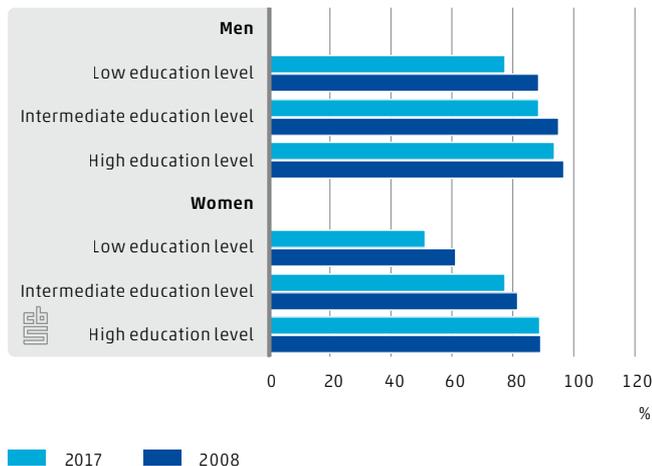
In particular, labour market participation among people with a Surinamese or Antillean immigrant background has fallen significantly since 2008. Employment levels among people with a Turkish and Moroccan immigrant background are now almost back to where they were in 2008. The difference between these groups and people with a Dutch background is also practically the same as in that year. Employment among people with a Moroccan immigrant background is relatively low (less than 55 percent), but it is noticeably higher than it was at the turn of the millennium.

Smaller reduction in employment among highly-educated people

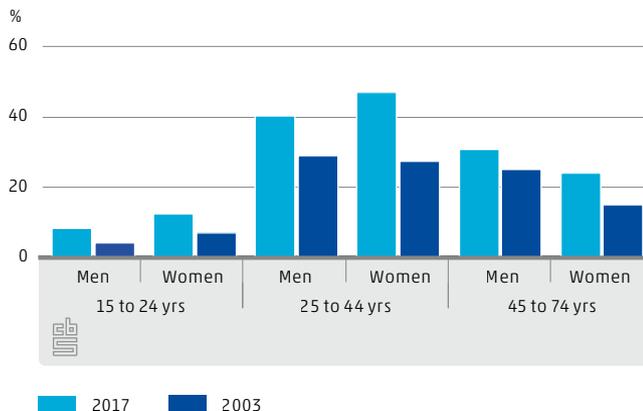
Labour market participation is not only related to the economic situation; it also has to do with a person's age and level of education. The net employment level of people with a lower level of education is roughly 50 percent; this figure is about 70 percent for people with a medium level of education and around 80 percent for highly-educated people. Employment in all three groups was lower in 2017 than in 2008. However, the development of labour market participation during fluctuations in the economic situation is different for those with a medium or low level of education compared with highly-educated people. Employment among people with both a low and a medium level of education has decreased in recent years, to five percent below 2008 levels. Among highly-educated people, employment levels fell by less than 1.5 percent.

When we compare men and women in the same education bracket, it is clear that there is greater net employment among highly-educated people, but also that there is a bigger difference in employment between men and

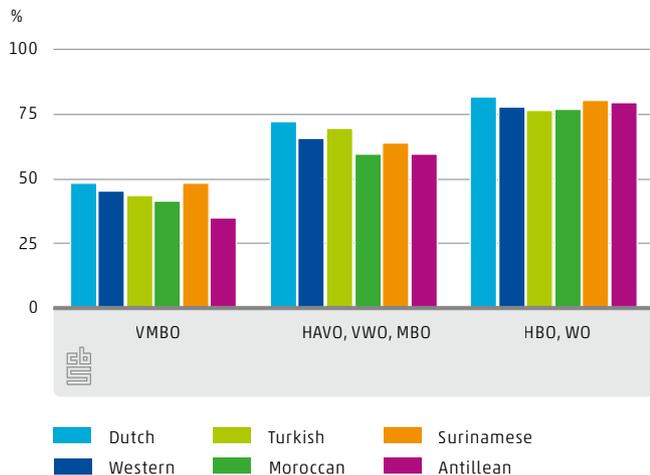
3.4 Net labour participation 25 to 44-year-olds



3.5 Share higher-educated



3.6 Net labour participation 15 to 74-year-olds, 2015



women in groups with medium and low levels of education. The difference between low-skilled men and women was almost 20 percentage points in 2017. Highly-educated men and women hardly differ in their labour market participation, although employment among highly-educated women aged over 45 years is lower than that of highly-educated men in that age group.

Significant fall in employment among low-skilled people aged between 25 and 44 years

The crisis has had a particularly heavy impact on 25 to 44-year-olds with a low level of education. For both men and

women, the net employment level among low-skilled people has fallen by more than ten percentage points since 2008. The reduction was strongest among men, but this group's labour market participation has been recovering in recent years. However, employment among low-skilled women aged between 25 and 44 years continues to fall. Employment levels are also still much lower among 15 to 24-year-old highly-educated men and medium-skilled men aged between 25 and 44 years, compared with 2008.

The share of highly-educated people aged between 15 and 74 years continues to increase, especially among women. In the under-45 age bracket, there are now more highly-educated women than men.

Labour market participation also increases in line with a person's level of education among people with a non-Dutch background, and the differences between people with an immigrant background and people with a Dutch background are smallest among people with a high level of education. Among highly-educated people of Surinamese and Antillean heritage,

employment levels are comparable to those of people with a Dutch background. Differences in labour market participation between people with a high education level are small in any case.

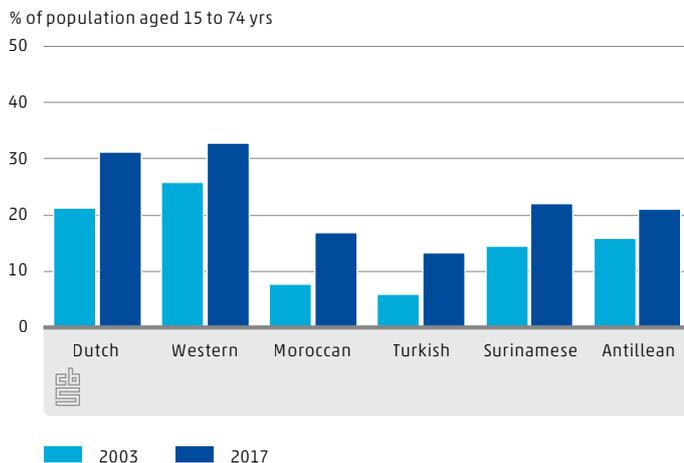
The percentage of highly-educated people among the group of people with a non-Western immigrant background is lower than among people with a Dutch or Western background. This proportion is growing, however, as it is in the other two groups.

Employment in the Netherlands is relatively high

In general, it can be asserted that there was a significant reduction in employment during the economic crisis. However, labour market participation in the Netherlands remained high in comparison with other countries: in the European Union, only Denmark, Estonia and Sweden have higher net employment levels.

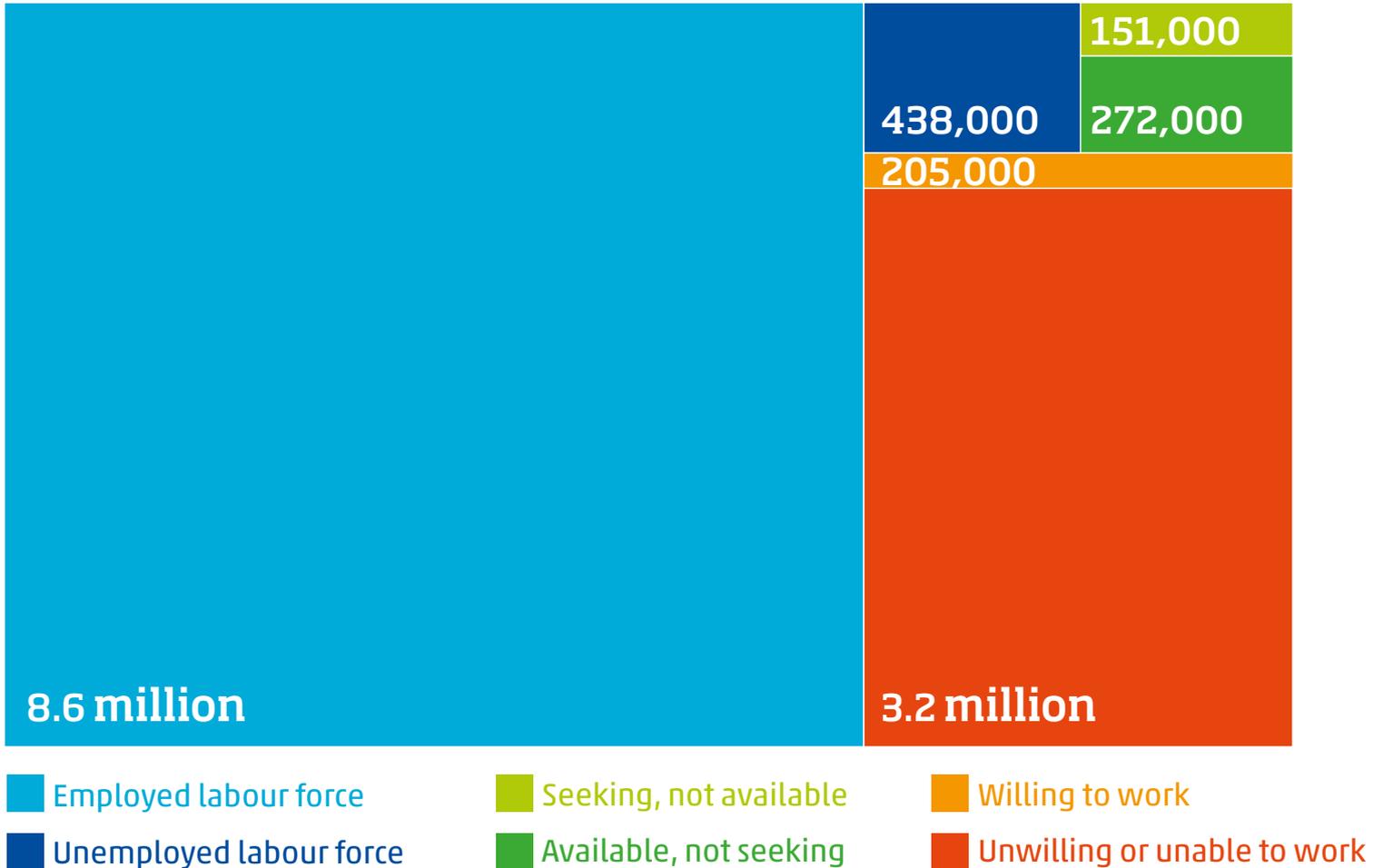
Women's employment has increased steadily over a long period. Although this increase slowed during the crisis, that did not impede the trend of women catching up with men in terms of labour market participation. This cannot be said for

3.7 Share higher-educated by migration background



various groups with a non-Western immigrant background. The fall in employment levels among, for example, people with a Surinamese or Antillean immigrant background was more significant than among people with a Dutch background. In addition, labour market participation among people with low or medium levels of education fell more sharply in the period 2008–2017 than did participation among highly-educated people. The extent to which the lower education level explains the significant decline in employment among people with a non-Western immigrant background has not been investigated.

Population aged 15-17 yrs by connection to labour market, 2017



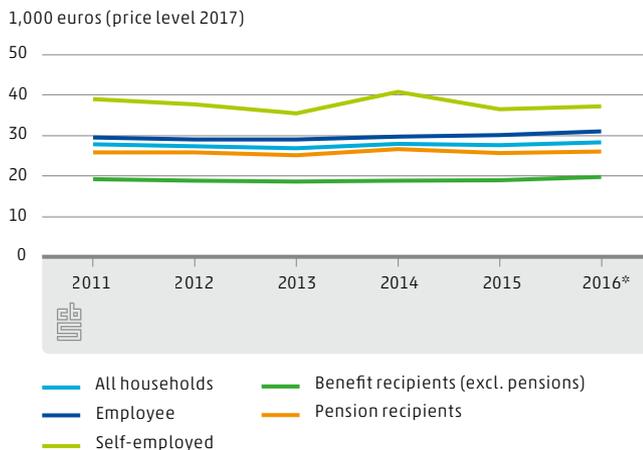
Figures

Income and expenditure

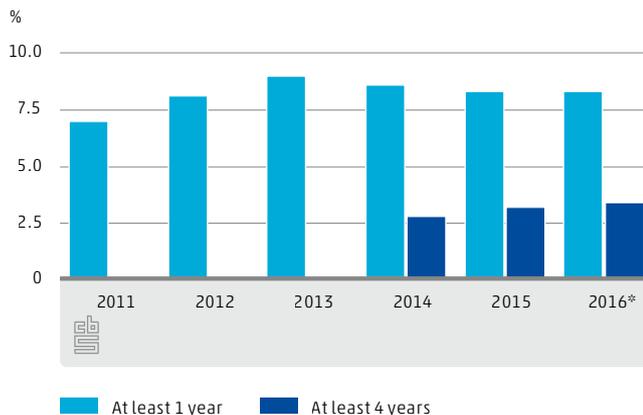
In 2016, the average standardised income per household was almost 3 percent higher than in 2015. The substantial rise in income in 2014 was not only the result of economic recovery, but was also driven by a tax measure that made it attractive for directors/principal shareholders to pay a large dividend that year. This also created a peak for households whose main source of income was sole trader activities. To a lesser extent, this effect was also apparent among pension recipients, including households for whom assets are the main source of income, often with dividend as a secondary income.

In 2016, 590,000 households had to get by on a low income; this is 8.2 percent of all households. The same figure applied in 2015, but it is a drop compared to 2014. It included 224,000 households who had been living on a low income for at least four consecutive years. That is 3.3 percent of all households. In 2014, 2.7 percent of households had been living

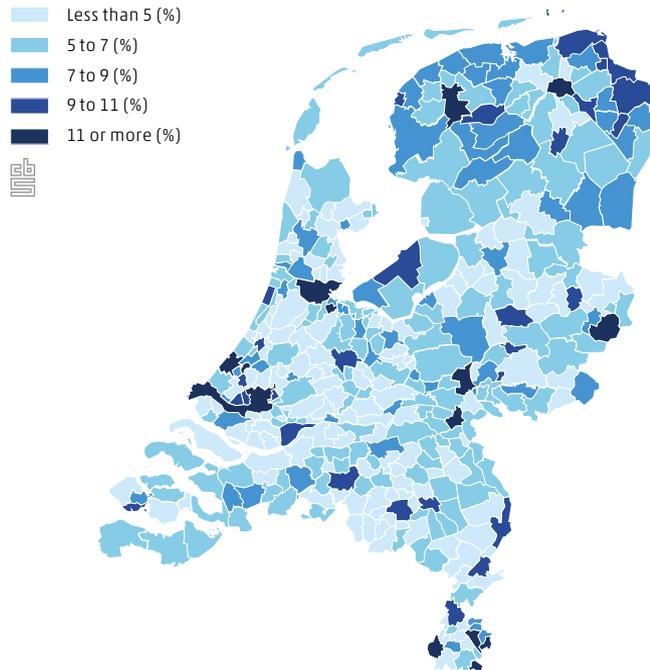
3.8 Standardised disposable household income



3.9 Low-income households



3.10 Share of low-income households, 2016



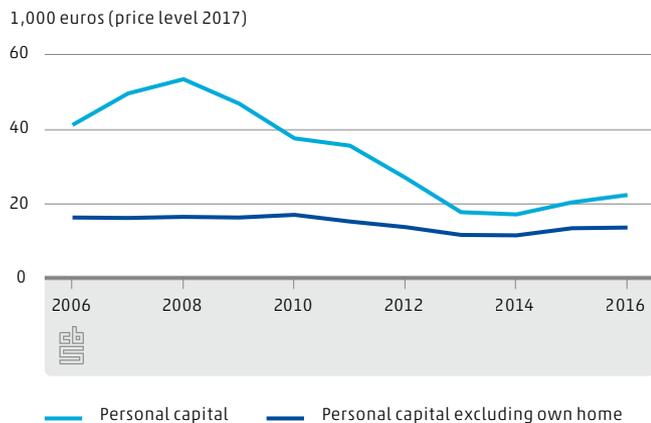
long-term on a low income. The increase in the number of long-term low-income households is mainly because more households have come to depend on income support benefit for an extended period.

As a rule, the larger the municipality, the higher the percentage of households living on a low income. With 15.3 percent, Rotterdam had the highest proportion of low-income households in 2016, followed by Groningen (14.7 percent) and Amsterdam (14.6 percent). The municipality of Rozendaal in the province of Gelderland had the lowest percentage of low-income households: 2.9 percent. In the north-east Netherlands, however, many smaller municipalities are particularly likely to have an above-average share of low-income households.

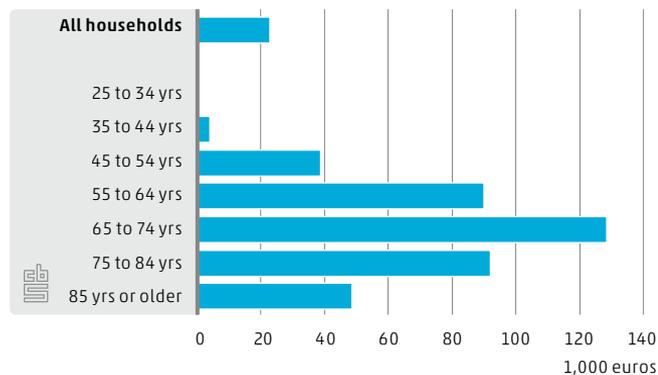
In 2016 median household wealth rose by almost 10 percent to over 22 thousand euros. The increase in median wealth – assets minus debts – is mainly due to rising property values. Aside from home ownership, median wealth held steady from 2015 to 2016. For the period 2006-2016, median household wealth reached its height in 2008, after which it dropped sharply as homes decreased in value.

Household capital accumulates more rapidly as life goes on. Household income declines when pension age is reached, but by this time home-owners have often repaid a substantial chunk of their mortgage. On 1 January 2016, elderly households (aged 65 to 75) had the highest capital, worth 125,000 euros on average. Beyond the age of 75, capital starts to diminish. A significant proportion of the families that make up this generation are large and had a single breadwinner, which meant that they were in less of a position to accumulate wealth than the young elderly.

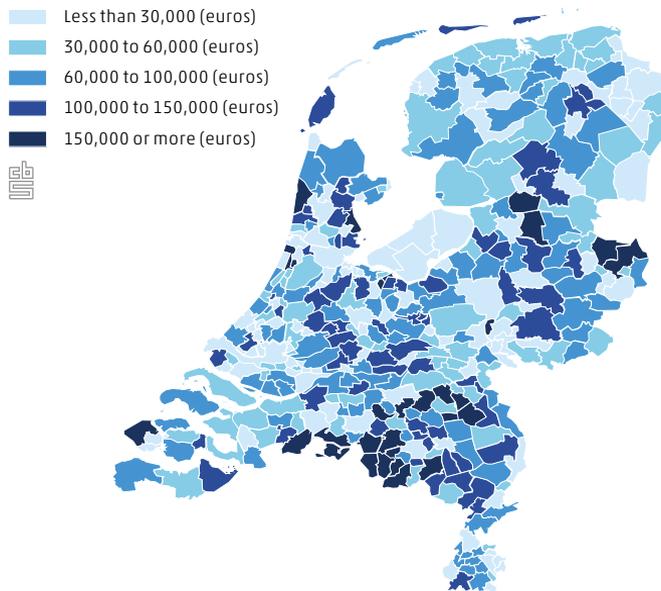
3.11 Median household wealth, 1 January



3.12 Median household wealth by age of main breadwinner, 1 January 2016



3.13 Median household wealth, 1 January 2016



With a median net worth per household of 281,000 euros, Laren in the province of Noord-Holland was the wealthiest municipality in the Netherlands on 1 January 2016. However, the top 10 was dominated by a number of small municipalities in Noord-Brabant, home to a relatively large number of elderly people.

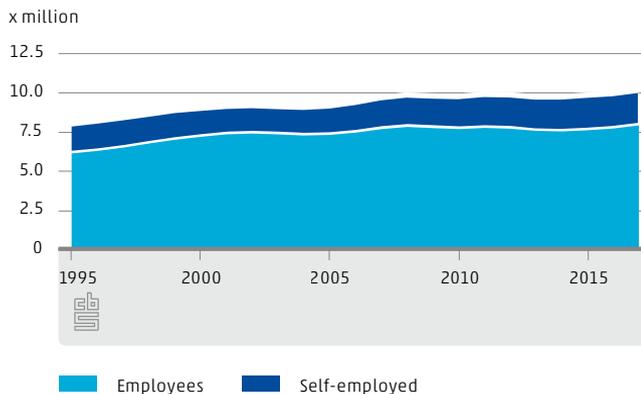
Households in Rotterdam had the lowest median net worth per household: 1,900 euros. The Hague and Amsterdam are also in the top 10 of municipalities with the lowest household capital. A relatively high number of young people, benefit recipients and people with a non-Western migrant background live in the Netherlands' largest cities. All of these groups tend to have little household capital.

Labour

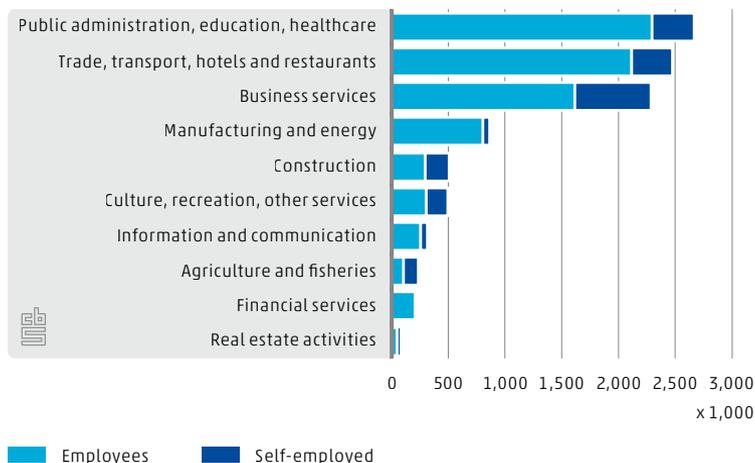
For three years in a row, there has been a marked increase in the number of jobs in the Netherlands. In 2017, 207,000 new jobs were created, the largest increase since 2008. This brought the total to 10.2 million, including 8.1 million jobs in paid employment and 2.1 million jobs for the self-employed. In comparison with 1995, the number of jobs has increased by 27 percent. The share of self-employed jobs fell from 21 to 20 percent.

More than one-quarter of these jobs can be found in public administration, education and healthcare. In 2017, most additional jobs were created in business services. The majority of these new jobs were temporary in nature. Most self-employed people work in business services. The percentage of self-employed jobs is highest in agriculture and fisheries, accounting for more than five out of every ten.

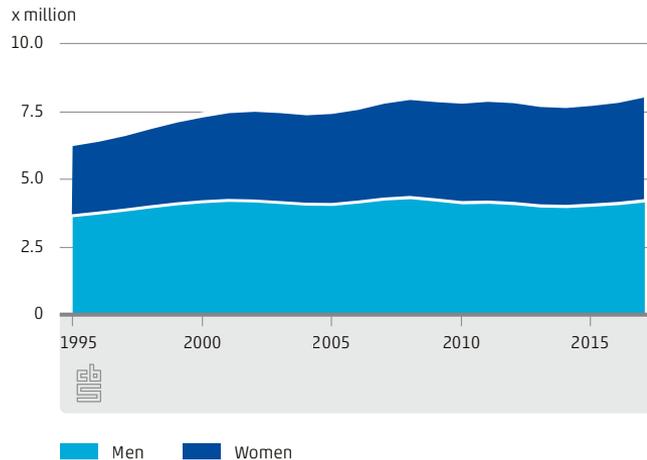
3.14 Jobs



3.15 Jobs by sector, 2017

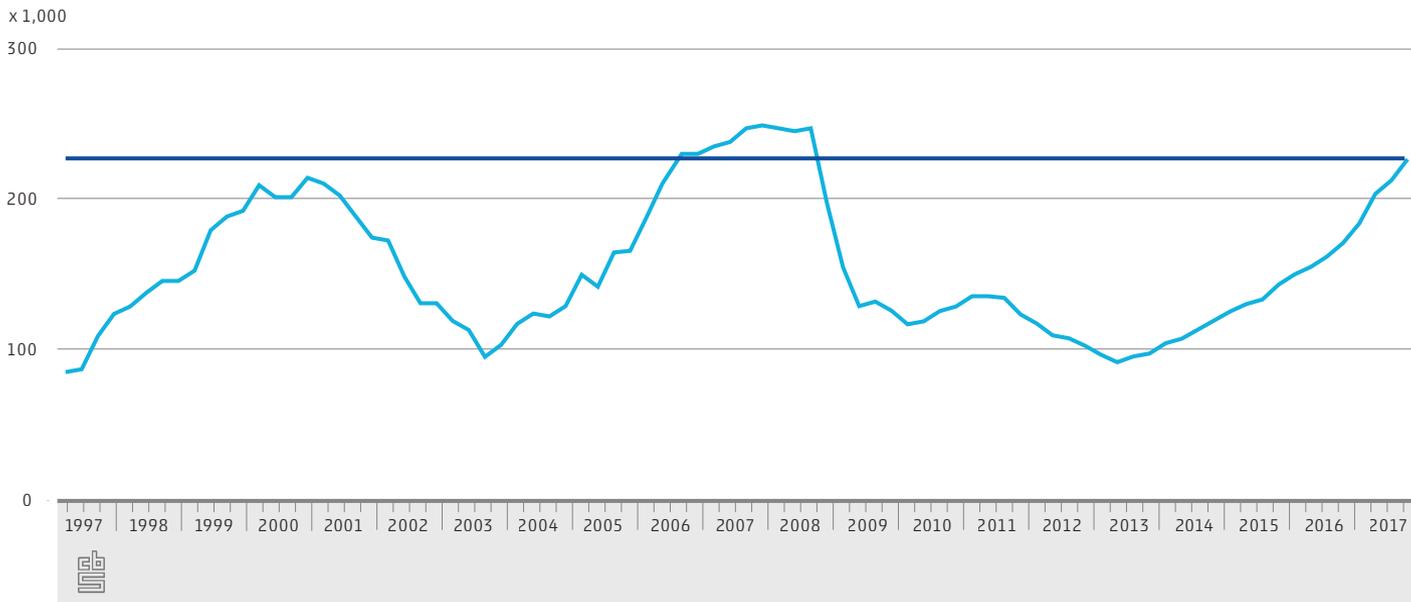


3.16 Employee jobs



In 2017 almost half of all jobs in paid employment were filled by women. In 1995, that proportion was 42 percent. Since then, the number of jobs for women in paid employment has almost doubled, while the number of jobs for men has gone up by 15 percent. The highest proportion of women can be found in healthcare (84 percent) and lowest in the construction industry (12 percent). Of the jobs in paid employment occupied by women, over three-quarters are part-time positions.

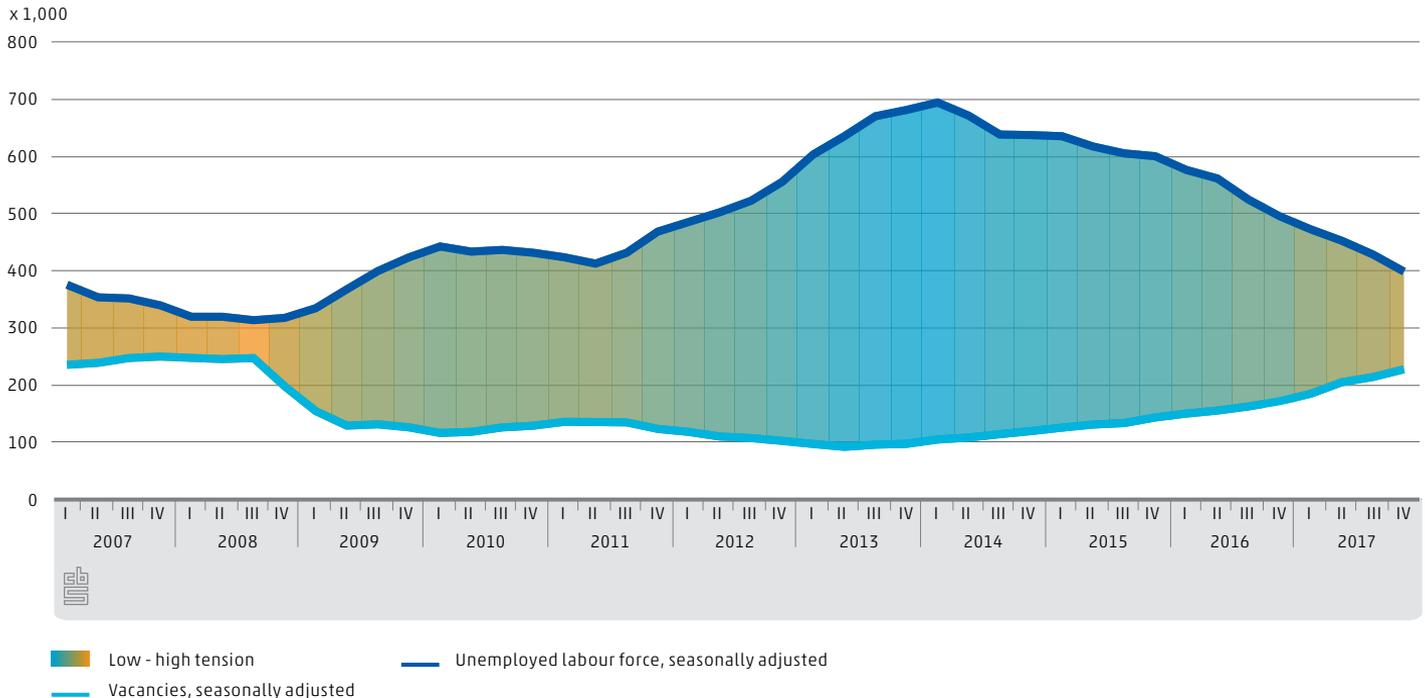
3.17 Vacancies per quarter



The number of unfilled vacancies rose by 45,000 in 2017 to an average of 201,000. This is the highest annual figure since the record number of vacancies in 2008, when there were 240,000 vacancies on average.

In 2013, the lowest level in twenty years was recorded: an average of 95,000 vacancies. Since then the number of vacancies has more than doubled.

3.18 Tension on the labour market



Over the course of the year, tension on the labour market increased. This tension was reflected in the ratio of unemployed to job openings. The fewer unemployed available to potentially fill each vacancy, the higher the tension. At the end of 2013, there were still

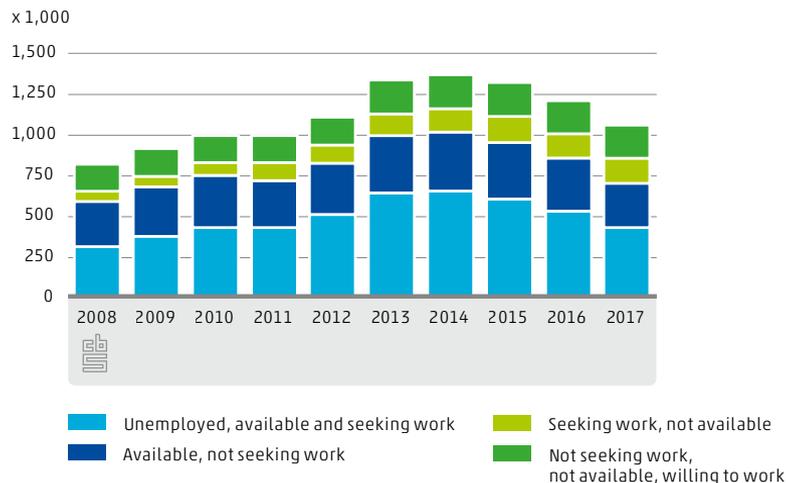
seven times as many unemployed people as vacancies. The labour market was therefore loose at the time. As unemployment fell and the number of vacancies rose dramatically, on average there were only 1.8 unemployed people per vacancy at the end of 2017.

This resulted in a tight labour market for the first time since the economic boom of 2007–2008.

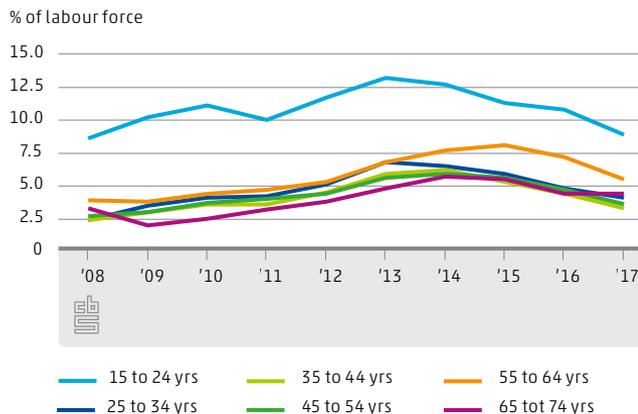
In 2017 the Netherlands was home to 438,000 unemployed people, defined as jobseekers readily available for work. In 2014, the number of unemployed was still 660,000. The number of people available to start work in the short term (i.e. within two weeks) without actively seeking employment has also fallen since 2014 (from 363,000 to 272,000 in 2017). The number of jobseekers who are not directly available has fluctuated around 150,000 since 2014.

Since 2014, the percentage of unemployed has fallen. In that year, 7.4 percent of the workforce was unemployed, while in 2017 this figure was 4.9 percent. The downward trend is visible in all age groups, but did not start until 2015 for the age category 55 to 64 years. Unemployment among the over-65s did not drop further in 2017. Unemployment is highest among 15 to 24-year-olds and has been for years. However, the difference in unemployment between

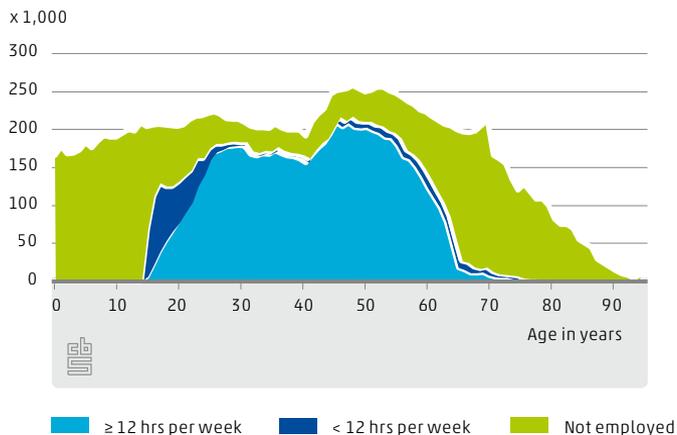
3.19 Connection to the labour market



3.20 Unemployment by age



3.21 Employed persons by working hours, 2017

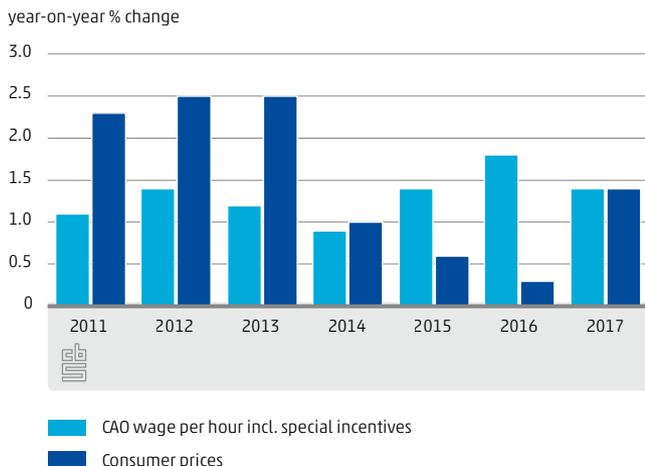


young people and the elderly (aged 55 to 64) has shrunk.

In 2017, 67 percent of the Dutch population aged between 15 and 74 years were in work. Of this group, 9 out of 10 people worked 12 hours or more per week. Of the young people in work (aged 15 to 18 years), 7 out of 10 had a part-time job of less than 12 hours. From the age of 64, working activity drops sharply.

In 2017, salaries determined by collective labour agreements rose by 1.4 percent, keeping pace with consumer price rises. In 2015 and 2016, the increase in consumer prices lagged well behind rises in collectively agreed wages. This contrasts sharply with the period 2011–2014, when wage rises lagged behind developments in consumer prices during the economic crisis.

3.22 Developments in CAO wages and consumer prices

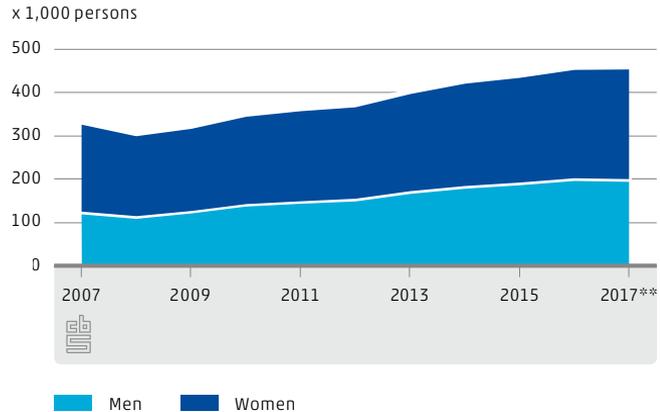


Social security

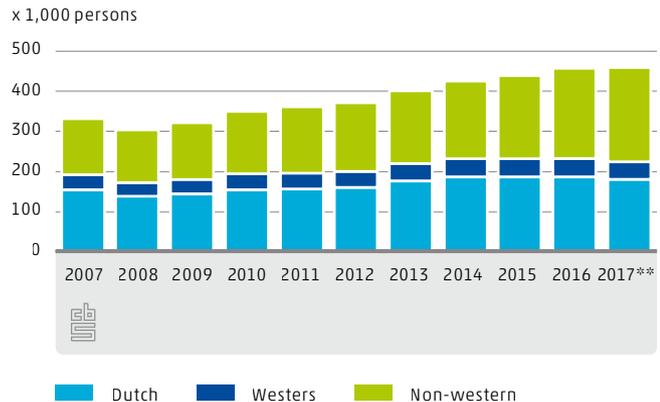
At the end of September 2017, approximately 260,000 women and 200,000 men below the state pension age were receiving income support benefit. For years, more women than men have been receiving income support benefit, but the difference has become smaller as the number of male recipients has risen faster than the number of female recipients. The number of women on income support benefit has increased by 25 percent since 2007, compared to a rise of 60 percent among men.

At the end of September 2017, the Netherlands was home to over 459,000 recipients of income support benefit below the state pension age, roughly on a par with 2016. In other words, the increase in the number of people receiving this benefit has come to a virtual standstill after a period of continuous growth since 2008. Among people with a non-Western migration background, however, the number of benefit recipients did increase. This group accounts for about half of the income support benefit population. There has been a gradual decline in

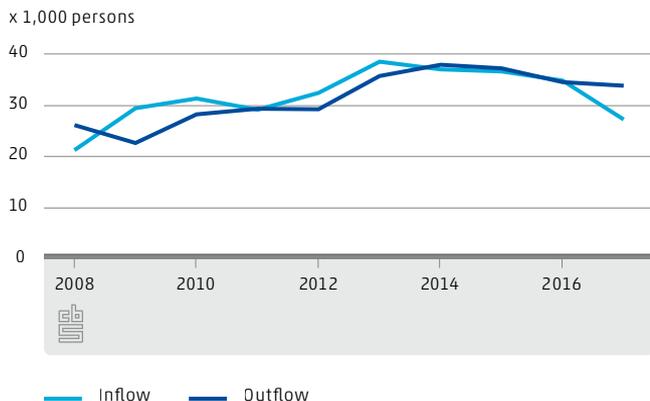
3.23 Income support, 30 September



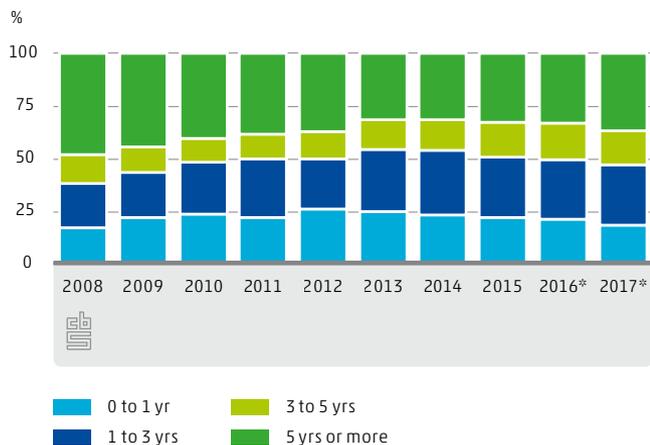
3.24 Income support by migration background, 30 September



3.25 Income support inflow and outflow, 30 September



3.26 Duration of income support, 30 September



benefit recipients among people with a Dutch background or a Western migration background.

In Q3 2017, 27,000 people received income support benefit for the first time, while 34,000 left the system. In previous years the number of people joining or leaving the income support benefit system was more or less the same. The decline in the third quarter of 2017 is most marked among the male population. The influx of men into income support fell by around 5,000 compared to the previous year, while the number leaving the system stayed more or less the same.

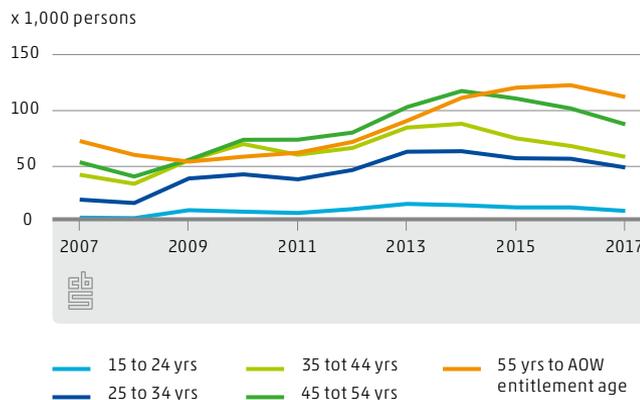
In 2017, the proportion of people receiving income support benefit for less than a year accounted for under 20 percent of the income support benefit population. That is the lowest figure since 2008. The number of people receiving income support benefit for five years or more has been rising slowly since 2014. One reason is the step-by-step increase in the state pension age, as a result of which people lose their entitlement to income support benefit in favour of state old age pension at a later stage.

The number of people receiving unemployment benefit increased from 149,000 in September 2008 – the start of the economic crisis – to 425,000 in early 2014. From that point on, the number of recipients began to fall again. Among unemployed persons aged between 55 and state pension age, the decline began two years later. It is generally more difficult for the over-55s to re-enter the workplace after a period of unemployment. At the end of June 2017, 318,000 people were receiving unemployment benefit.

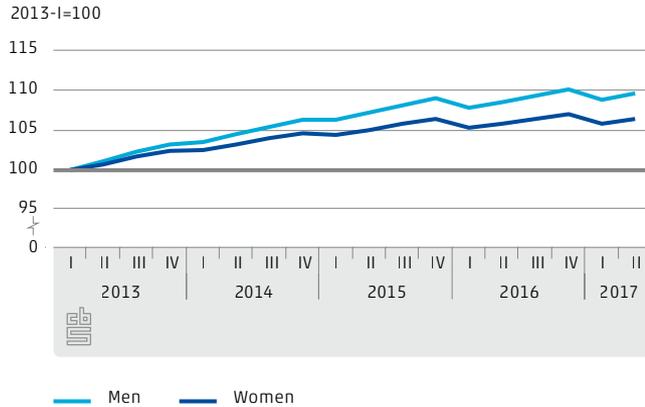
In January 2018, a total of 3.4 million people were receiving state old age pension: nearly 1.6 million men and over 1.8 million women. Ten years earlier less than 2.7 million people were on state old age pension; nearly 1.2 million men and nearly 1.5 million women. Today 19.7 percent of the total population is receiving state old age pension.

Nine out of ten of these pensioners live in the Netherlands. Over 338,000 Dutch pensioners live abroad, almost half of them in Belgium, Spain or Germany.

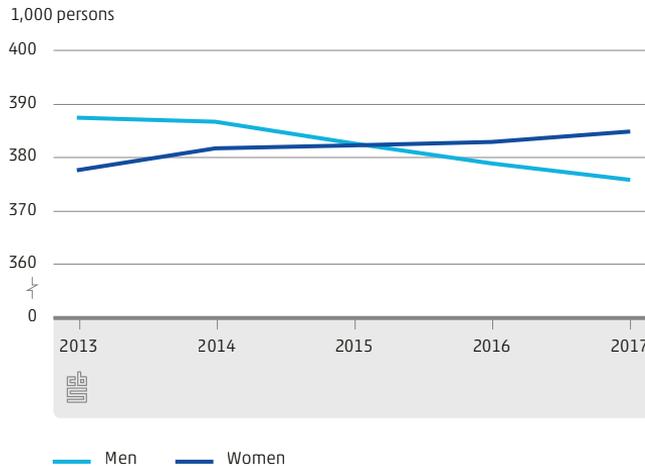
3.27 Unemployment benefits, end of Q2



3.28 People on state pension benefits, end of quarter



3.29 Disability benefits, end of second quarter



From 1 January 2013, the state pension age has been increasing by annual increments, from 65 to 67 and 3 months in 2023. In both 2016 and 2017, the state pension age was increased by three months, following one-month increments in each of the preceding years since 2013. The effect of this process can be seen in the drop in the number of state pension recipients at the beginning of each reporting year. In spite of this, the number of state pension recipients continues to rise, slightly more markedly among men than among women.

In the second quarter of 2017, 761,000 people were receiving incapacity benefit, over 4,000 fewer than in June 2013. In 2013, male recipients of incapacity benefit outnumbered female recipients, but they were overtaken by the women in Q3 2015. This is largely due to the considerable increase in the employment rate of women in recent years, which has also led to an increase in the number of incapacitated women. This is especially true of nursing and the healthcare sector, in which female staff vastly outnumber male staff and where the number of incapacity benefit recipients is high.

4. About CBS

Statistics Netherlands (CBS) responds to current events in society by compiling and disseminating statistical information.

This information is vital for gaining insight into societal developments and formulating answers to (policy) questions. CBS is focused on broad trends in society and how they relate to each other.

Quality of data

CBS places a high priority on the quality of data and wants to maximise their value to society. State-of-the-art technology is used in order to convert the growing amounts of data into useful information, in a way that is innovative, society-oriented and reliable.

Relevant figures

CBS employs around 2,000 people at locations in The Hague, Heerlen and on Bonaire.

Approximately 600 statistical surveys are published every year. CBS data are shared with the outside world via news releases, videos and social media, resulting in around 50,000 articles in newspapers and on news websites each year.

Most followers

Information can also be found on the CBS website and in the StatLine database, which comprises more than 4 thousand tables with a total of no fewer than 14 billion figures. All this information is available to everyone free of charge. You can also follow us on Twitter, Facebook, Instagram, LinkedIn and YouTube. With 117,000 followers on Twitter, we have one of the most-followed social media accounts of any government-related organisation in the Netherlands.

CBS in the media

51,000 news mentions

39,000

newspaper
and web mentions



400

statements by spokes-
persons on radio and TV



9,839

items on radio and TV



5,832

followers on Facebook



117,000

followers on Twitter



