

**European Commission**  
**Directorate-General for Agriculture**

**EUROPEAN AGRICULTURE  
ENTERING THE  
21<sup>st</sup> CENTURY**

*October 2002*

<b>FOREWORD</b>	<b>7</b>
<b>LIST OF ACRONYMS AND ABBREVIATIONS</b>	<b>8</b>
<b>CHAPTER I THE AGRICULTURAL ECONOMY IN THE EU</b>	<b>10</b>
1. KEY AGRICULTURAL STATISTICS	10
1.1. Share of agriculture in the GDP	10
1.2. Share of agriculture in employed civilian working population	10
2. STRUCTURE OF AGRICULTURAL HOLDINGS	11
2.1. Land use (1 000 ha)	11
2.2. Agricultural holdings: total number and average agricultural area	11
2.3. Total number of holdings by size classes (1 000 holdings)	12
2.4. Distribution of holdings by size classes (%)	12
2.5. The economic size of agricultural holdings (Economic Size Unit)	13
2.6. Standard Gross Margin per holding (Economic Size Unit)	13
2.7. Total number of holdings by economic size classes ('000 Economic Size Unit)	14
2.8. Distribution of holdings by economic size classes (%)	14
2.9. Type of tenure	15
2.10. Holdings with livestock	15
2.11. Total number of holdings by type of farming in 1997 (1 000 holdings)	16
2.12. Utilised Agricultural Area by type of farming in 1997 (1 000 ha)	16
3. AGRICULTURAL LABOUR	17
3.1. Evolution of employment in agriculture in the EU (1 000 AWU)	17
3.2. Evolution of the employment in agriculture per MS (1 000 AWU)	17
3.3. Share of women in total employment in the EU agriculture (%)	18
3.4. Distribution of total labour force per holder's age (1 000 holders)	18
3.5. Evolution of agricultural labour per holding	19
3.6. Total agricultural labour: breakdown by working time (1 000 persons)	19
3.7. Holders with other gainful activities (1 000 holders)	20
4. PRICES AND INCOME IN AGRICULTURE	21
4.1. Indices of real output prices for agricultural products (1990=100)	21
4.2. Indices of real purchase prices for goods and services currently consumed in agriculture (1990=100)	21
4.3. Comparison between producer prices for agricultural products and consumer prices for food products in the EU (1995=100 in nominal terms)	22

4.4.	Variation in nominal producer prices for agricultural products and harmonised consumer prices for food products from 1991 to 2000 per Member State (%) -	22
4.5.	Market value of agricultural land (nominal prices in Euro/ha) -----	23
4.6.	Market value of arable land (nominal prices in Euro/ha) -----	23
4.7.	Rents for agricultural land (nominal prices in Euro/ha) -----	23
4.8.	Development in agricultural income in the EU (index form base 1980=100 and %) -----	24
4.9.	Indices of the agricultural income per Member State from 1990 to 2001 (1995 = 100) -----	24
4.10.	Farm profitability: ratio of gross farm income to total assets, 1991 and 1999 (%) -----	25
4.11.	Fixed assets as percentage of total assets in 1991 and 1999 (%) -----	25
5.	EU AND WORLD TRADE -----	26
5.1.	Total Agricultural World trade and EU market share (billion EUR)-----	26
5.2.	EU trade in raw and processed products (billion EUR)-----	26
5.3.	EU and Rest of world export -----	27
5.3.1.	Cereals: Total world trade and EU market share (million EUR)-----	27
5.3.2.	Oilseeds: Total world trade and EU market share (million EUR) -----	27
5.3.3.	Livestock and meat: Total world trade and EU market share (million EUR)	28
5.3.4.	Dairy products: Total world trade and EU market share (million EUR) -----	28
5.3.5.	Fruit and vegetables: Total world trade and EU market share (million EUR)	29
5.3.6.	Wine, vermouth, alcoholic drinks: Total world trade and EU market share (million EUR) -----	29
5.3.7.	Food preparation: Total world trade and EU market share (million EUR)---	30
5.3.8.	Other processed products: Total world trade and EU market share (million EUR) -----	30
5.4.	Total trade in agricultural products per Member State -----	31
5.4.1.	Total export of agricultural products (million EUR) and intra-trade (%) ----	31
5.4.2.	Total import of agricultural products (million EUR) and intra-trade (%) ---	32
5.5.	Intra-EU trade: all agriculture-----	33
5.5.1.	Intra-EU export per Member State - 2001-----	33
5.5.2.	Intra-EU import per Member State - 2001-----	33
5.6.	Intra-EU import per products (million EUR) 1991-2001-----	34
5.7.	Major products exported and imported intra-EU in 2001 by Member State (million EUR, descending order)-----	34

<b>CHAPTER II AGRICULTURAL MARKETS IN THE EU</b> -----	<b>36</b>
1. BALANCE SHEET CEREALS -----	36
1.1. Common Wheat - Balance sheet 1999/2000 (thousand t)-----	36
1.1.1. Development of European balance sheet - Common Wheat -----	36
1.2. Durum Wheat - Balance sheet 1999/2000 (thousand t) -----	37
1.2.1. Development of European balance sheet - Durum Wheat -----	37
1.3. Total coarse grains - Balance sheet 1999/2000 (thousand t) -----	38
1.3.1. Development of European balance sheet - Total coarse grains -----	38
1.4. Barley - Balance sheet 1999/2000 (thousand t)-----	39
1.4.1. Development of European balance sheet - Barley-----	39
1.5. Grain Maize - Balance sheet 1999/2000 (thousand t)-----	40
1.5.1. Development of European balance sheet - Grain Maize -----	40
1.6. Rye - Balance sheet 1999/2000 (thousand t)-----	41
1.6.1. Development of European balance sheet - Rye-----	41
2. BALANCE SHEET RICE -----	42
2.1. Rice - Balance sheet 2000 (thousand t: milled equivalent)-----	42
2.1.1. Development of European balance sheet - Rice (thousand t: milled equivalent)-----	42
3. BALANCE SHEET SUGAR-----	43
3.1. Sugar - Balance sheet 2000 (thousand t) -----	43
3.1.1. Development of European balance sheet - Sugar -----	43
4. OILSEEDS PRODUCTION (OILSEEDS FOR FOOD AND NON-FOOD PURPOSES)-----	44
4.1. Oilseeds area and production 2001: sunflower, rape seed, soya (thousand ha/t) 44	
4.1.1. Development of European area and production for soya, sunflower and rape seed (food and non-food purposes) -----	44
5. PROTEIN CROPS PRODUCTION -----	45
5.1. Protein crops - Production 2001/2002 (thousand t)-----	45
5.1.1. Development of area and production - Protein crops-----	45
6. TOMATO AND APPLE PRODUCTION-----	46
6.1. Tomato - Production 2001 (thousand t) -----	46
6.1.1. Development of European production - Tomato (thousand t)-----	46
6.2. Apple - Production 2001 (thousand t)-----	47
6.2.1. Development of European production - Apple (thousand t) -----	47
7. TOBACCO PRODUCTION-----	48
7.1. Raw Tobacco Production 2000 -----	48
7.1.1. Development of European raw tobacco area-----	48

8.	COTTON PRODUCTION-----	49
8.1.	Cotton - Production 2000/2001 (thousand t) -----	49
8.1.1.	Development of European production - Cotton (thousand t) -----	49
9.	BALANCE SHEET OLIVE OIL AND TABLE WINE -----	50
9.1.	Olive oil - Balance sheet 2001/2002 (thousand t) -----	50
9.1.1.	Development of European balance sheet - Olive oil (thousand t) -----	50
9.2.	Table Wine - Balance sheet 2000/2001 (1 000 hl) -----	51
9.2.1.	Development of European balance sheet - Table wine (1 000 hl) -----	51
10.	BALANCE SHEET MEAT-----	52
10.1.	Total meat - Balance sheet 1999 (thousand t) -----	52
10.1.1.	Development of European balance sheet - Total meat (EU-12 until 1994) -	52
10.2.	Beef and Veal - Balance sheet 1999 (thousand t)-----	53
	Development of European balance sheet - Beef and Veal (EU-12 until 1994)--	53
10.3.	Pig - Balance sheet 1999 (thousand t) -----	54
10.3.1.	Development of European balance sheet - Pig (EU-12 until 1994) -----	54
10.4.	Poultry - Balance sheet 1999 (thousand t) -----	55
10.4.1.	Development of European balance sheet - Poultry (EU-12 until 1994)-----	55
10.5.	Sheep and goat - Balance sheet 1999 (thousand t) -----	56
10.5.1.	Development of European balance sheet - Sheep and goat (EU-12 until 1994)-----	56
11.	BALANCE SHEET DAIRY PRODUCTS -----	57
11.1.	Butter - Balance sheet 1999 (thousand t)-----	57
11.1.1.	Development of European balance sheet - Butter (thousand t)-----	57
11.2.	Cheese - Balance sheet 1999 (thousand t) -----	58
11.2.1.	Development of European balance sheet - Cheese (thousand t) -----	58
11.3.	Skimmed Milk Powder - Balance sheet 1999 (thousand t)-----	59
11.3.1.	Development of European balance sheet - Skimmed Milk Powder (thousand t)-----	59
11.4.	Whole Milk Powder - Balance sheet 1999 (thousand t)-----	60
11.4.1.	Development of European balance sheet - Whole Milk Powder (thousand t)	60

<b>CHAPTER III EXPENDITURE AND SUPPORT FOR THE AGRICULTURAL SECTOR IN THE EU</b>	<b>62</b>
1. BUDGET BREAKDOWN: EAGGF GUARANTEE SECTION 1993-2001 IN THE EU (MILLION EUR)	62
2. TREND IN EAGGF GUARANTEE SECTION EXPENDITURE BY MEMBER STATE (MILLION EUR)	62
3. EVOLUTION IN EAGGF GUARANTEE SECTION EXPENDITURE BY PRODUCT (MILLION EUR)	63
4. TREND IN EAGGF GUIDANCE SECTION EXPENDITURE BY MEMBER STATE (MILLION EUR)	63
5. DIRECT PAYMENTS TO THE PRODUCERS, BY SIZE CLASS, PAID BY THE EAGGF IN THE FINANCIAL YEAR 2000 FOR ARABLE CROPS AND LIVESTOCK PREMIA	64
6. NUMBER OF BENEFICIARIES OF DIRECT PAYMENTS, BY SIZE CLASS, PAID BY THE EAGGF IN THE FINANCIAL YEAR 2000 FOR ARABLE CROPS AND LIVESTOCK PREMIA	64
7. DEVELOPMENT IN THE PSE OF THE AGRICULTURAL SECTOR AS A WHOLE IN THE EU (%)	65
8. DEVELOPMENT IN THE PSE OF SPECIFIC AGRICULTURAL PRODUCTS IN THE EU (%)	65
 ANNEX	 66
1. AVERAGE AGRICULTURAL AREA AND AVERAGE STANDARD GROSS MARGIN PER HOLDING	67
2. UTILISED AGRICULTURAL AREA BY TYPE OF FARMING	68
3. TOTAL NUMBER OF HOLDINGS BY SIZE CLASS	69
4. EMPLOYMENT IN AGRICULTURE	70
5. FARM NET VALUE ADDED PER TOTAL LABOUR INPUT IN THE FADN REGIONS	71
6. INTRA-EU TRADE IN AGRICULTURE	72

## Foreword

This publication provides an overview of the evolution of the agricultural situation in the EU and in all Member States over the last 10 years. It can therefore be interpreted as a dynamic photograph of European agriculture at the beginning of the new century.

It is mainly based on statistical information from Eurostat, as available in September 2002. In certain cases, data collected or estimated by the Directorate-General for Agriculture have also been used.

This report contains three chapters. Chapter I focuses on the agricultural economy in the EU and covers the following aspects: the role of agriculture in the economy, structures of agricultural holdings, employment in agriculture, prices, income and trade. Chapter II gives an overview of the market balance sheets for a certain number of agricultural products. Chapter III covers the main budgetary aspects.

**List of acronyms and abbreviations**

A	Austria
AWU	Annual Working Unit
B	Belgium
BLEU	Belgium and Luxembourg
CAP	common agricultural policy
D	Germany
DG AGRI	European Commission, Directorate-General for Agriculture
DK	Denmark
E	Spain
EAGGF	European Agricultural Guidance and Guarantee Fund
EL	Greece
ESU	Economic Size Unit
EU	European Union
Eurostat	Statistical Office of the European Communities
F	France
FADN	farm accountancy data network
FIN	Finland
GDP	gross domestic product
ha	hectare
hl	hectolitre
I	Italy
IRL	Ireland
L	Luxembourg
LSU	Livestock Size Unit
mio T	million metric tonne
MS	Member State
NL	Netherlands
OECD	Organisation for Economic Co-operation and Development
P	Portugal
PSE	Producer Support Estimate
S	Sweden
SGM	Standard Gross Margin
SMP	Skimmed Milk Powder
t	metric tonne
UAA	Utilised Agricultural Area
UK	United Kingdom
WMP	Whole Milk Powder