Statistics in focus

AGRICULTURE AND FISHERIES

THEME 5 – 4/2001

AGRICULTURE

Contents

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The range of agricultural holdings and fruit and vegetable production

2. Fruit

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Fruit and vegetables together account in equal proportions for an eighth of economic activity in EU agriculture (measured by SGM[1]). A quarter of this gross margin is generated by five regions (two in Spain, two in Italy and one in the Netherlands). Europe's fruit trees, including citrus and soft fruits, are concentrated in the EU's five "Mediterranean" countries, with Spain, Italy, France, Portugal and Greece accounting for 93% of the Community's fruit growing areas and 91% of production. A third of all dessert fruit (33 million tonnes in EU-15 in 1999) comes from Spain, and another third from Italy. In response to demand, apple and peach orchards were extensively renewed between 1992 and 1997. Fruit and vegetables both come under the Common Organisation of the Market (COM). The diversity of this sector of production is apparent with regard to agricultural holdings, types of farming and marketing. The accession of the candidate countries to the European Union should affect the market in fruit. These countries produce small fruit, and they also import dessert fruit and citrus fruit.

Fruit and vegetables, an eighth of the economic activity of EU agriculture

Fruit and vegetables (excluding potatoes and bananas) fall under the same COM **(Box 4 page 7)**. Yet their method of production is extremely varied (permanent crops or arable land, under glass or open air, climate requirements…) analysing this sector thus needs care. It accounts for 12.5% of total SGM[1] in agriculture. Fruit and vegetables contribute in equal proportion to this figure **(Figure 1)**.

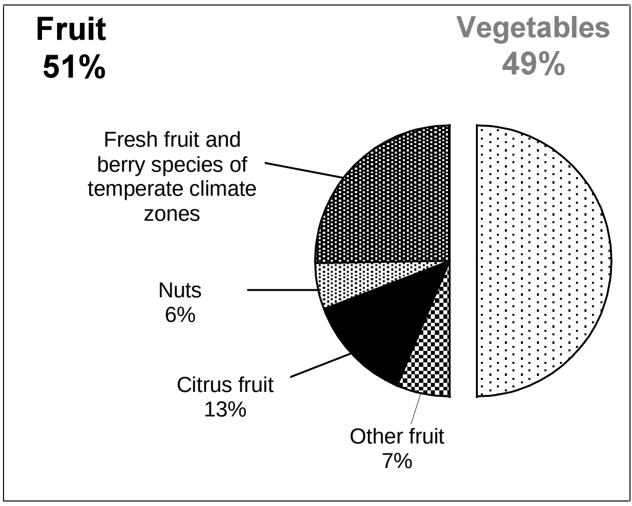

Figure 1: Breakdown of SGM of fruit by type of product 1997, EU-15 (excluding Germany)

[1] *SGM: standard gross margin = specific products - specific costs (more information can be found in Statistics in Focus, Theme 5, No 9/2000). It is very highly correlated (correlation coefficient = 0.99) to measured gross production for fruit and vegetables, in the regions where these two indicators are known.*

A good quarter of SGM is generated solely by *fruit trees* and *soft fruits of temperate climate zones*. In spite of being grown on half a million holdings covering more than a million hectares, nuts contribute only 6% to the SGM of fruit and vegetables.

The regions growing fruit and vegetables are mainly located in the south of the European Union **(Figure 2).** A quarter of the SGM for fruit and vegetables is accounted for by five regions: *Andalucía* and *Comunidad Valenciana* (E), *Sicily* and *Emilia Romagna* (I) and *West-Nederland* (NL). A half is accounted for but 15 regions. ▶

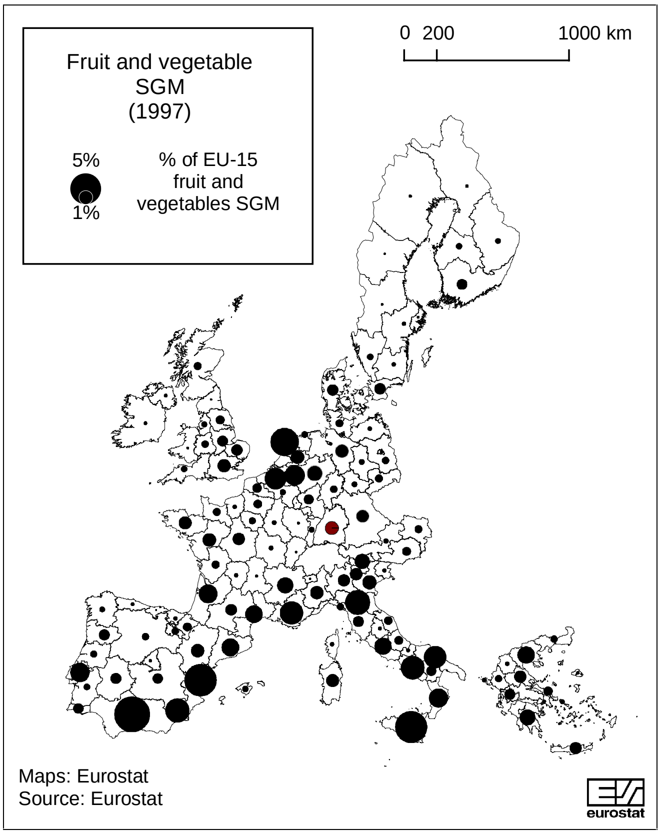

Figure 2: SGM of fruit and vegetables, 1997

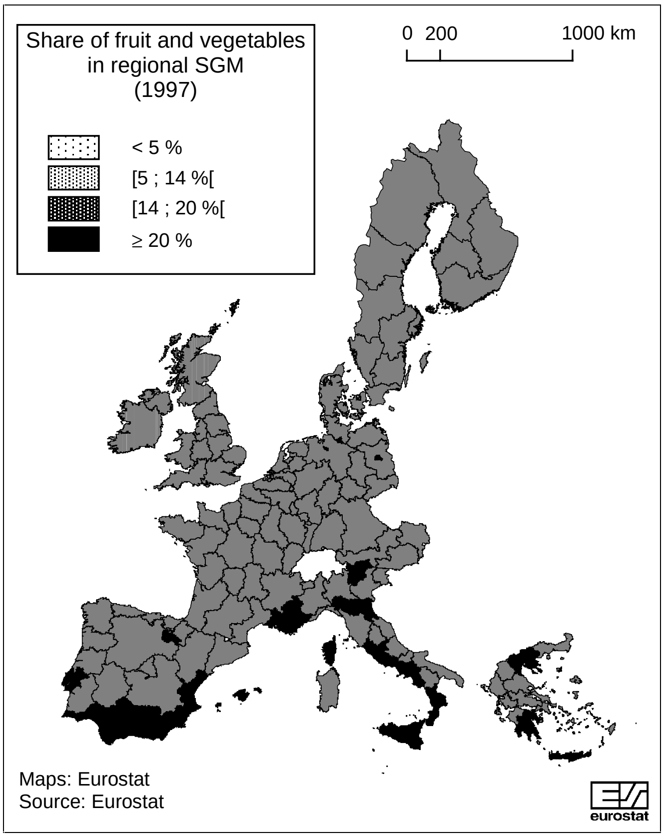

Figure 3: Contribution of SGM of fruit and vegetables to regional SGM, 1997

Europe's orchards

More than a million agricultural holdings in EU-15 had *plantations of fruit trees* or *soft fruits* in 1997. Of these, more than half a million cultivated *fruit trees* and *soft fruits of temperate climate zones*, and half a million *grew nuts*. The total area under cultivation came to 2 million hectares, thus comprising what can be called Europe's orchards. *Soft fruits of subtropical climate zones* (kiwis, avocados, prickly pears…) figured only marginally (54 000 hectares, excluding the French overseas départements).

Holdings with fruit trees are concentrated (93%) in five EU Member States: Italy, Spain, Greece, Portugal and France. The other Member States had fewer than 35 000 hectares each in 1997. Fruit growing holdings are also affected by the trend towards fewer holdings, with the number down by -22% in EU-12* between 1987 and 1997, compared with a fall of -24% for agricultural holdings in general.

The area under fruit trees also declined slightly in EU-12* between 1987 and 1997 (-2.2 %), although this figure conceals differences at national level **(Figure 5).** In the ten years to 1997, areas increased in Belgium (+43%, but from a very low starting figure), France (+8%), Portugal (+13%) and Germany (+9%). The figure in Spain was the same in 1997 as in 1987, although it had recorded a peak in 1990. In Italy the 1997 figure was similar to the figure for 1975 (560 000 hectares), having risen to its highest level during the 1980s.

Further information on these changes in area comes in the form of data about grubbing-up and replanting which, together with irrigation, has helped to improve quality and adapt products to the market (Box 1 page 4 and 2 page 5).

The regions that contribute more than 1% of SGM for fruit and vegetables include:

- regions with greenhouse cultivation: *Vlaams gewest en Brussel* (B), *Zuid et West-Nederland* (NL);
- regions with open-air farming: South East (UK), *Aquitaine* (F), *Brittany* (F);
- a fruit growing area: *Bolzano-Bozen* (I);
- areas of periurban market gardening: *Lisbon* (P), *Hamburg, Bremen, Berlin* (D).

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In some regions, the economic significance of fruit and vegetables is way above the European average **(Figure 3).** Out of 126 regions:

- seven regions generate more than half of their total regional SGM from fruit and vegetable production: *Comunidad Valenciana*, *Murcia*, *Madeira, Canarias* (E), *Algarve* (P), *Bolzano-Bozen, Trento* (I)
- 23 regions generate more than a quarter of their regional SGM;
- nearly one region in two generates more than 5% of its total regional SGM.

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Although according to the survey on the structure of agricultural holdings **(Box 5 page 7)** the holdings *specialising in fruit or citrus fruit production* (Farm type 32) account for only 56% of holdings with *plantations of fruit trees or soft fruits*, their contribution to regional SGM **(Figure 4)** is comparable to the share of UAA for such crops. In EU-15 in 1997, some 1.7% of the UAA in question was administered by 8% of holdings, which employed 5.9% of the total labour force and 14.0% of seasonal labour.

Holdings specialising in fruit or vegetables (Farm type 32, 143 and 201) account for 8.8% of European agriculture's SGM (4.2% for fruit, 1% for outdoor vegetables and 3.6% for market gardening) while occupying only 2.5% of area.

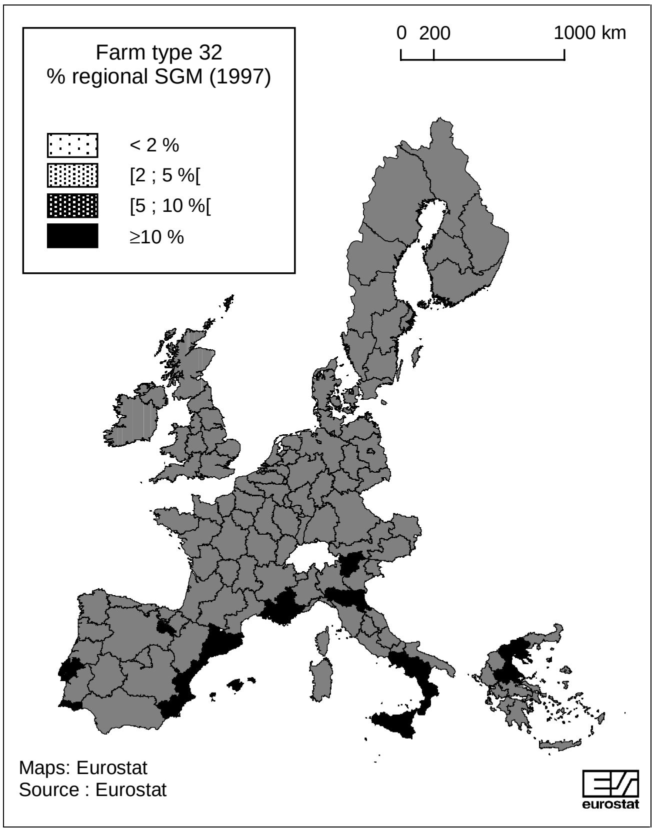

Figure 4: Contribution of holdings specialising in fruit and citrus fruit to regional SGM, 1997

concentrated in five countries

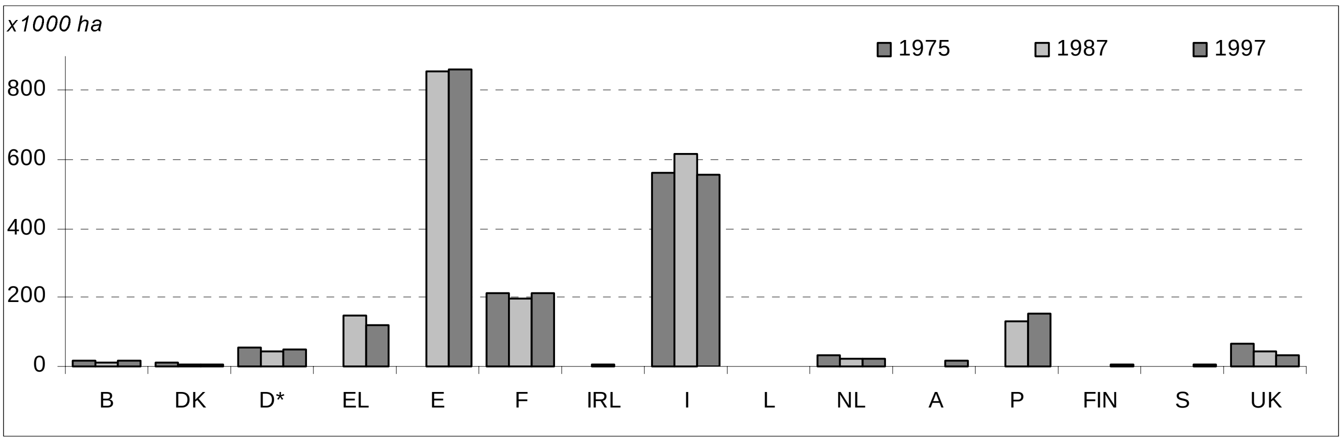

Figure 5: Areas under fruit trees and soft fruits

Restructuring of citrus groves

In EU-15 in 1997 there were 413 000 holdings in five Member States growing citrus fruits on a total area of 537 000 hectares. Since Spain and Portugal joined the Community, the number of farmers growing citrus fruits in those countries has declined, with the numbers falling by -17% and -28% respectively between 1987 and 1997 **(Figure 6)**. In Italy in 1997, according to the Farm Structure Survey, there were 127 000 holdings growing citrus fruits. The peak figure had been recorded in 1989/90 as a result of the census and a large number of small holdings. There was also a reduction in the number of citrus fruit growers in Greece between 1983 and 1990. Since 1993 the number of holdings seems to have stabilised at about 86 000. The number of such holdings in France is very small (fewer than a thousand).

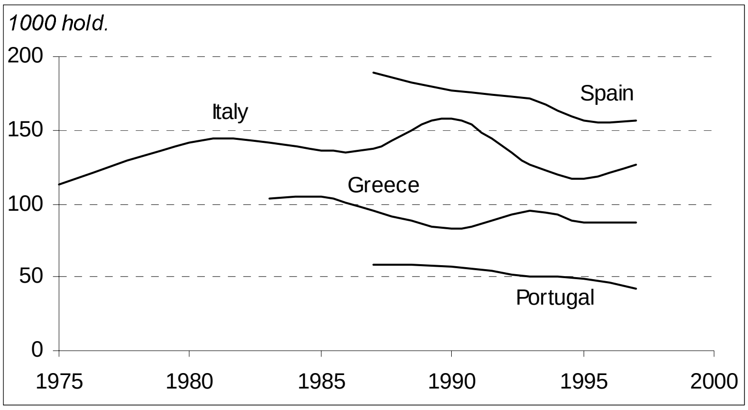

Figure 6: Number of citrus fruit growers

Areas under citrus fruits were unchanged in Portugal (25 000 hectares) and Greece (48 000 hectares). In Spain, however, there has been a steady rise (+18% since 1987), and also in Italy (+11% since 1975).

The average area of citrus holdings in EU-12 went up by 31% between 1987 and 1997. In particular, the number of holdings of at least 50 hectares increased by 4%, and those with less than 2 hectares by 16%; the figure was down by 10% for other holdings. Restructuring has thus led to an expansion of bigger holdings and a shrinking of smaller or less specialised holdings.

Box 1: Renewal of apple and peach orchards in response to the market

The market in apples and peaches (including nectarines) is regularly affected by withdrawals because of surpluses or poor quality. Large quantities then go into intervention: an average of 332 000 tonnes of apples and 337 000 tonnes of peaches and nectarines in the last three marketing years. In order to adapt, growers in Europe are restricting quantities and improving the quality of their produce (by reducing areas under cultivation or selecting new varieties).

According to the orchard survey, apple orchards in EU-12 shrank by more than 10% from 307 000 to 275 000 hectares between 1992 and 1997. In EU-15 in 1997 one apple tree in five was less than five years old, and half the trees were less than 10 years old. Only one tree in ten was more than 25 years old. Cultivation of two-tone apples is increasing sharply, while more traditional varieties (Golden Delicious, Granny Smith, American Red) are declining. These younger orchards are more productive and produce better quality. This limits the effect that grubbing-up has in controlling production.

The cultivation of peaches in EU-12 shrank by 12.5% from 227 000 to 200 000 hectares between 1992 and 1997. In 1997 some 40% of peach trees were less than 10 years old, and one in six was less than five years old. These average figures for Europe conceal some big differences:

- In Italy, the leading producer by area, there has been less renewal of orchards in the last ten years than elsewhere in Europe. Large-scale grubbing-up has cut peach growing areas by 23% in five years.
- In Spain, on the other hand, orchards have expanded (+12% in five years) and become younger: six of ten trees are less than 10 years old, and three of ten less than five years old.
- There was little change between 1992 and 1997 in Greece, where trees had been renewed earlier. In 1997 half of the trees in Greece were less than 10 years old. As a result, there was less intervention on fresh fruit in the country, together with fewer surpluses. The effect of intervention on production went down by a factor of four in three years (three-yearly averages).
- The number of trees was declining in France (-29%) and Portugal (-58%), where replanting was continuing.

Significant annual variations in production of dessert fruit

The production of dessert fruit amounted to 33.4 million tonnes in EU-15 in 1999. Italy, the Community's leading producer since 1970, lost the top spot to Spain in 1997 **(Figure 7).** Production in Italy has been around 10 million tonnes since 1970, but Spain produced 10.9 million tonnes in 1999, up by 40% from the 1986 figure of 7.8 million. Production in France has varied between 3 and 4 million tonnes since 1970. The Greek figure is a little lower: between 2.5 and 3.5 million tonnes.

The weather and biological[2] conditions cause sharp annual variations in production. These variations, particularly strong in Germany, are felt less in the Mediterranean countries.

Citrus fruits account for about a third of EU dessert fruit production **(Table 1 and Figure 8).** Spain, Italy and Greece are the main producer countries. Apples, which are grown in every Member State, represent a quarter of dessert fruit production in the EU.

Dessert fruit	Production (Mio t)	Share of production
Dessert apples	7.85	25%
Dessert pears	2.31	7%
Oranges	5.49	17%
Clementines	1.95	6%
Lemon	1.57	5%
Other citrus fruits	0.73	2%
Peaches	2.81	9%
Other stone fruits	2.19	7%
Nuts	1.54	5%
Dessert grapes	2.67	8%
Strawberries	0.88	3%
Soft fruits	0.66	2%
Other	1.37	5%
TOTAL	**32.03**	**100%**

Table 1: Production of dessert fruit (average 1997/98/99)

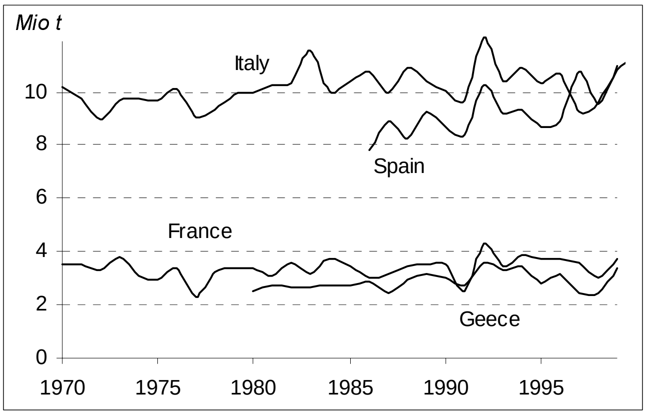

Figure 7: Production of dessert fruit in main producer countries

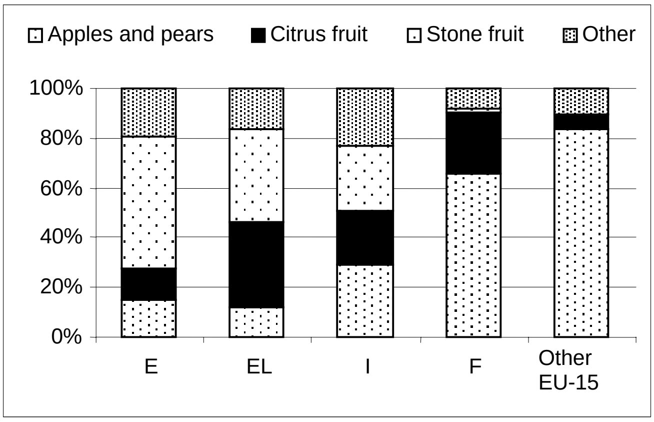

Figure 8: Structure of dessert fruit production, 1997

Box 2: Irrigation, essential for fruit growing in the south of Europe

The survey on the structure of agricultural holdings provides information on areas that are irrigated at least once during the year. In the case of fresh fruit trees and berry plantations, about one hectare in four was irrigated in 1997. For citrus groves, the figure was close to two out of three.
In Greece 72% of the area under fruit trees was irrigated, with the figure rising to 96% in the case of citrus fruits. In Spain the figures were 29% and 100% respectively.
France irrigates 62% of its area under fruit trees, and 97% in the case of citrus groves (located in *Corse* and *Provence-Alpes-Côte d'Azur).*

[2] *Some fruit trees have a biennial production cycle, with the result that production fluctuates tremendously.*

A third of EU fruit production traded internally

Extra-Community imports of fruit amounted on average to 16% of production between 1996 and 1998 (20% for citrus fruits). Overall, the European Union is not self-sufficient in fruit (93%). Exports of certain fruits (peaches and nectarines, lemons, clementines…) do not offset imports, especially of oranges and tropical fruits.

Most imports come from Mediterranean countries (Morocco for citrus fruits) or from the Southern hemisphere (South Africa, New Zealand…), where the production seasons allow fresh produce to be available all year round. Exports amount to 3.4 million tonnes (8% of production). The main items are apples (0.4 million tonnes), half of which go to Russia, and citrus fruits (1.1 million tonnes), most of which are exported to Eastern Europe, where the main crops are small fruits **(Box 3)**.

Box 3: Fruit production in the candidate countries

Production of fresh fruit in the candidate countries[3] amounts to more than 10 million tonnes, a third of the EU figure. Turkey alone accounts for 80%, mainly apples and citrus fruits (mandarins). The other candidate countries grow mainly soft and small fruits. Poland produces 0.16 million tonnes of strawberries, two thirds of the candidate countries' production.

Production in Turkey (1994 figures) tends to be below the levels attained by the main EU producers, and production in the other candidate countries is modest. Their accession to the European Union will thus provide outlets for Europe's fruit and will improve self-sufficiency in citrus fruits.

Production of dessert fruit (Mio t)		Total		Main producer		
		EU-15	CC-13	EU-15	% EU-15	CC-13
Apples		7.8	3.3	Italy : 2.2	27%	Turkey : 2.1
Pears		2.3	0.5	Italy : 0.8	34%	Turkey : 0.4
Citrus fruits		9.7	2.0	Spain : 5.6	57%	Turkey : 1.8
in which	- oranges	5.5	1.0	Spain : 2.7	49%	Turkey : 0.9
	- mandarins	0.3	0.5	Italy : 0.1	46%	Turkey : 0.4
Stone fruits		5.0	2.7	Italy : 1.9	38%	Turkey : 1.3
in which	- peaches	2.8	0.5	Italy : 1.0	35%	Turkey : 0.4
	- apricots	0.5	0.5	Spain : 0.2	30%	Turkey : 0.4
Soft fruits		0.7	0.8	Italy : 0.4	58%	Turkey : 0.5
Strawberries		0.9	0.2	Spain : 0.3	36%	Poland : 0.2
Nuts		1.5	0.8	Spain : 0.6	40%	Turkey : 0.8
Dessert fruit		32.0	10.5	Spain : 10.8	34%	Turkey : 8.4

Production of dessert fruit, EU-15 candidate countries (CC-13)
Three-yearly averages 1997/98/99, 1996 figures for Slovenia, 1994 national data for Turkey

[3] Bulgaria, Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovenia, Slovakia and Turkey.

Box 4: Common organisation of the market undergoing tremendous change

The common organisation of the market in fruit and vegetables was reformed in 1996, the aim being to help and encourage producers in the EU to cope successfully with a more open and competitive market in the coming years by strengthening their main advantages:

- the quality of their products;
- their ability to respond to a rapidly changing market;
- the services they can offer in connection with a varied range of healthy products.

With this aim in mind, budget resources have focused on the financing of positive measures: market orientation, decentralised management, grouping of supply (currently fragmented in response to demand) through producer organisations. The purpose of these measures is to build for the future and to incorporate environmental concerns.

Three regulations were adopted, and major amendments were recently made to all three by Regulation (EC) No 2699/2000.

- *Council Regulation (EC) No 2200/96 on the common organisation of the market in fruit and vegetables*
  For fresh fruit and vegetables, this regulation reflects the general objectives (i) by strengthening the role of producer organisations (creation of an operational fund, administered by the producer organisations and jointly financed by the Community, permitting the funding of a programme of structural measures - operational programmes); (ii) by amending the way of administering short-term surpluses (cutting compensation for withdrawals and limiting the quantities that producer organisations can withdraw) in order to reduce the risk of structural surpluses. This regulation brought about a simplification of operational fund arrangements by fixing a single ceiling (4.1% of the value of the marketed production of each producer organisation).
- *Council Regulation (EC) No 2201/96 on the common organisation of the markets in processed fruit and vegetable products*
- *Council Regulation (EC) No 2202/96 introducing a Community aid scheme for producers of certain citrus fruits*

The schemes that existed until 2000 for peaches, pears and tomatoes provided aid to processors who bought their raw products at a higher price than the minimum price set in connection with contracts signed before the start of the marketing year. Under Regulation (EC) No 2699/2000, they were replaced by schemes that provided aid to producer organisations according to the weight of raw material delivered to processors, similar to the scheme that had existed for citrus fruit since 1996. The regulation also introduced thresholds for each Member State; if they are exceeded, the result will be a reduction in aid to the relevant Member States the following year.

Box 5: sources of data on fruit and vegetables

1 – The Farm Structure Survey (FSS) allows the uniform recording of information on areas for the cultivation of fresh vegetables, melons or strawberries and on holdings that grow such crops (headings D/14 et D/15). The same kind of information is collected for permanent crops (heading G). Supplementary data on greenhouses and irrigation allow greater detail in profiling holdings. The attribution of SGM by product also makes it possible to classify holdings by type of farming (Farm type). The data are taken from censuses conducted every ten years and from intermediate surveys carried out every 2-3 years on a representative sample of agricultural holdings. The last known results are from 1997 survey.

2 – The agricultural production database contains annual national data on the areas and yields of a large number of types and varieties of fruit and vegetables. It also contains data on the supply balances of 14 products (fresh fruit, apples, pears, citrus fruits, vegetables…).

3 – The FRUCTUS orchard database contains data on seven types of fruit tree (apples, pears, peaches, apricots, oranges, lemons and small citrus fruits). Tree age, density of plantation and the varieties grown are recorded by country and area of production. The survey has been carried out every five years since 1977.

4 – Intervention data come from DG Agriculture (Agriculture in the European Union - Statistical and economic information 1999, http://europa.eu.int/comm/agriculture/agrista/table_en/45.htm).

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