Statistics in focus

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Contents

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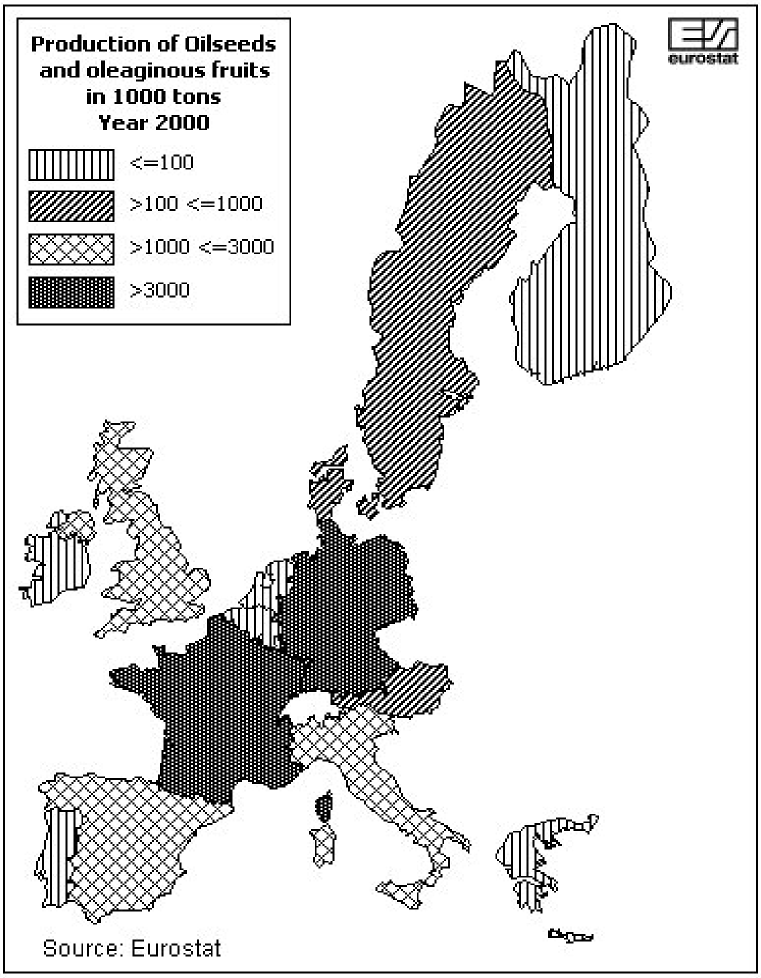
Oilseed production in the EU

A.D. Verhoog

Summary



With a share of 2% in the total output value of agriculture, the production of oilseeds is responsible for around 4% of the total Guarantee budget in 2000. Subsidies account for more than half of the total value of oilseeds for the EU as a whole. The most important oilseed is rape, followed by sunflower and soya. The main producing countries for rape seed are France and Germany. France and Spain are the main producers of sunflower seed and Italy is the main producer of soya beans. The output of sunflower seed and soya bean production in the EU has stabilized since 1987, but the output of rape seed production has been growing. In 1992 the prices for oilseeds in the main producing countries declined sharply because of the CAP reform policy. The purpose of this CAP reform policy was to bring market prices down by lowering the intervention prices, thus narrowing the gap between internal prices and world market prices. On the other hand the level and stability of the farmers income should be ensured by an increase in the direct payment per hectare. In total there are more then 420.000 farms in the EU that grow oilseeds. Only 27.000 (excluding Germany) of them gain more than two thirds of their total standard gross margin from oilseeds. More then 65% of these farms were located in Italy. Of these oilseed producing farms in Italy, 60% have oilseed production areas of less than 5 hectare.

Introduction

	1995	1996	1997	1998	1999	2000
Total crop products	22,831.6	24,876.7	26,263.0	26,587.5	26,739.2	25,812.3
Arable crops	15,018.3	16,372.3	17,414.1	17,945.2	17,865.9	16,663.1
- of which oilseeds	2,288.9	2,381.0	2439.4	2,368.6	2,429.2	1,624.6
Total animal products	10,558.6	12,208.4	11,575.1	9,631.5	9,440.1	9,275.7
Other measures	279.7	170.4	520.3	682.1	773.3	1,173.0
Accompanying measures	832.1	1,852.3	2,064.8	1,847.0	2,588.2	
Expenditures outside guidelines			251.9		335.5	29.3
Total expenditure	34,502.0	39,107.8	40,675.1	3,8748.1	39,876.3	40,466.7
% share of oilseeds in total expenditures	6.63	6.09	6.00	6.11	6.09	4.02
% share of oilseeds in arable crops	15.24	14.54	14.01	13.20	13.60	9.74
Source: European Commission (DG AGRI)						

Table 1: Trends in EAGGF Guarantee Section expenditures (mln. Euro) by sector and share of oilseeds in expenditures

The 1992 Blair House Agreement on Oilseeds was an important element of the final Uruguay Round Agreement of GATT for agriculture. Under the Agreement, the oilseed plantings (rape seed, sunflower seed and soya beans) for food purposes in the European Union were limited to 5.482 million hectares.

Blair House also required a set-aside of at least 10 percent to receive payments. The production of industrial (non-food) oilseeds on set-aside area was limited to a maximum of 1 million tons of soyameal equivalent. From the marketing year 2000/01, the Agenda 2000 reform of the CAP brought about several amendments to the EU arable crops support system. One of the main elements in the Agenda 2000 reform is the gradual decrease in the level of compensatory payments for oilseeds to the level of that for cereals and for set aside; this will mean a payment of EUR 63 per ton from the marketing year 2002/03 onwards. The purpose of the reform for oilseeds is to eliminate the specific character of oilseeds and to free producers from the hectare limits set out in the Blair House Agreement. During the transition years 2000/01 and 2001/02 the hectare payments under the main scheme have been calculated, as before by multiplying a fixed amount (EUR 81.74 per ton in 2000/01 and EUR 72.37 per ton in 2001/02) by the regional historical yields. Unlike before, small producers have also been entitled to receive the oilseed-specific payments. EU support for oilseeds is limited to compensatory payments. Oilseed prices are not supported through intervention or export subsidies. The share of oilseeds in the total expenditure of the EAGGF Guarantee Section was just above 6% between 1996 and 1999, but dropped seriously to 4% in 2000 (table 1). The share of oilseeds in the total expenditures of crop products decreased slightly from over 15% in 1995 to 13.6% in 1999. In 2000 the share of oilseeds in the total expenditures decreased to less then 10%.

Economic importance of oilseeds in agriculture output

Agricultural output is to be valued at basic prices. The basic price is that received by producers for a unit of a good produced as output minus taxes and plus subsidies on products (incl. area payments). The total output value of agriculture at basic prices in the European Union amounted to more than 274 billion Euro in 2000 (table 2). Among Member States, the share of oilseeds in this total amount was only 2%. The share of oilseeds in the total output value of agriculture was just over 3% in Germany and in France, while in Belgium, Greece, the Netherlands, Portugal, Finland and Sweden this share was below 1%.

As a share of the total crop output value in the Member States, the value of oilseeds accounted for between almost 0% in the Netherlands to 6% in Germany.

	Total output value of agriculture	total output value of crop products	total output value of oilseeds	% share of oilseeds in total output	% share of oilseeds in total crop output
Belgium	6928	3024	10	0.1	0.3
Denmark	8324	3223	113	1.4	3.5
Germany	43823	22373	1346	3.1	6.0
Greece	10682	8126	23	0.2	0.3
Spain	33265	20726	486	1.5	2.3
France	62281	35900	1958	3.1	5.5
Ireland	5902	1157	0	0.0	0.0
Italy	41065	26604	559	1.4	2.1
Luxembourg	252	86	3	1.4	4.0
Netherlands	19202	9633	4	0.0	0.0
Austria	4950	2320	98	2.0	4.2
Portugal	6067	3518	25	0.4	0.7
Finland	3640	1718	30	0.8	1.7
Sweden	4964	2431	44	0.9	1.8
United Kingdom	24028	9454	465	1.9	4.9
European Union (15 countries)	275374	150293	5163	1.9	3.4

Table 2: Value at basic prices (mln. Euro) of agricultural output and total crop output (2000) and share of oilseeds.

Importance of subsidies in the output value of oilseeds

	Basic prices	Subsidies	Taxes	Producer prices	% share of subsidies on output value
Belgium	10	2	0	7	25
Denmark	113	59	0	54	52
Germany	1346	676	0	669	50
Greece	23	9	0	14	40
Spain	486	283	0	203	58
France	1958	890	3	1071	45
Ireland	0	0	0	0	0
Italy	559	330	29	257	59
Luxembourg	3	1	0	3	25
Netherlands	4	0	0	4	0
Austria	98	38	0	59	39
Portugal	25	21	0	5	81
Finland	30	17	0	13	56
Sweden	44	20	0	24	45
United Kingdom	465	235	0	230	51
European Union (15 countries)	5163	2582	32	2614	50

Table 3: Value of oilseeds at basic prices (mln. Euro) and share of subsidies in the output value of oilseeds (2000)

The total value of oilseeds at basic prices is strongly influenced by subsidies; the contribution of the subsidies in the output value of oilseeds at basic prices varied from 25% in Luxembourg and Belgium to more then 80% in Portugal in 2000 (table 3). For the European Union as a whole the share of subsidies in the output value of oilseeds at basic prices amounted to about 50% in 2000. The separate values, subsidies and taxes for rape seed, sunflower seed and soya beans is not provided by Spain and France. For the other countries, however, it was possible to calculate both subsidies per ton and per hectare. The subsidies per ton are rather high in Italy (rape seed) and Portugal (sunflower seed), mainly due to the low yields per hectare.

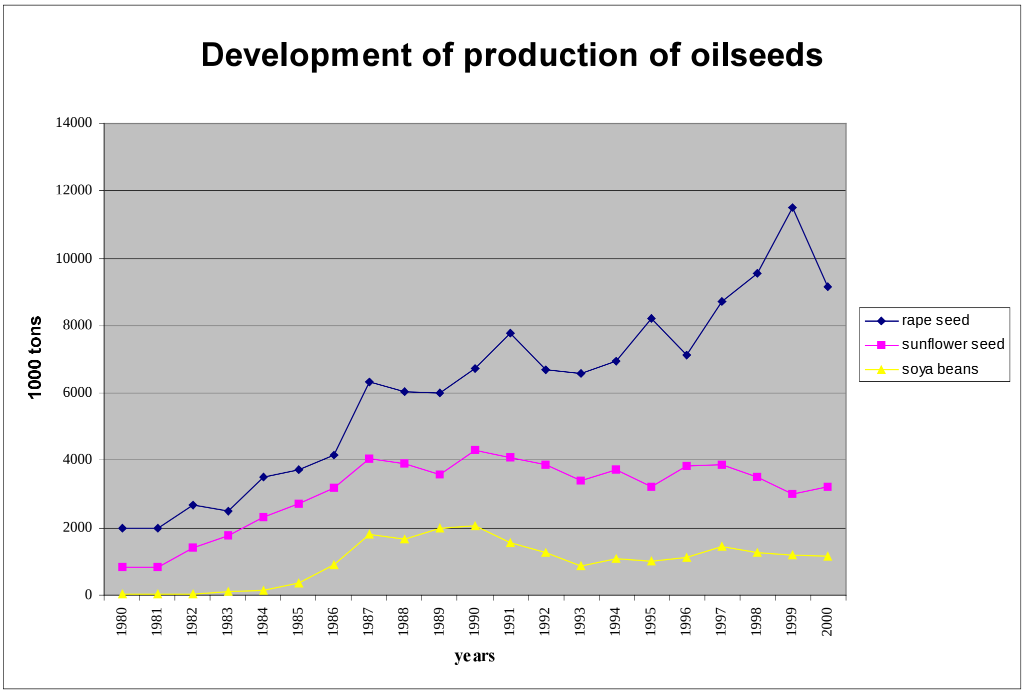
Production of oilseeds in the EU

The total area of oilseeds in the EU amounted to more then 5,6 million hectares in 2000, of which 54% was rape seed and 33% sunflower seed (table 4). France and Germany accounted for 75% of the total EU-area of rape seed in 2000, with France and Spain accounting for more then 80% of the total area with sunflower seed in the EU. Soya beans are mainly grown in Italy. Between 1980 and 1991 the total output of oilseeds (rape seed, sunflower seed and soya beans) in the European Union increased from just below 3 million tons to almost 13,5 million tons. Between 1980 and 1987 the soya bean production in Italy alone more than doubled every year. After the Blair House Agreement, the total output of oilseeds decreased slightly in 1992 and 1993. However, the output of oilseeds and especially the output of rape seed, started to increase strongly again after that. Indeed by 1999, EU oilseed output had risen to 15,4 million tons. In the first year after the Agenda 2000 reform of the CAP, output levels had fallen a steep 14% to 13,5 million tons.

	Total area with oilseeds	area with rape seed	area with sunflower	Area with soya beans	Area with other oilseeds
Belgium	19	5	:	:	14
Denmark	100	100	:	:	:
Germany	1215	1078	26	:	112
Greece	18	:	17	:	1
Spain	971	31	841	3	96
France	2031	1225	710	80	16
Ireland	3	3	:	:	:
Italy	505	36	217	253	:
Luxembourg	3	3	:	:	:
Netherlands	6	1	:	:	5
Austria	101	52	22	16	11
Portugal	48	:	48	:	:
Finland	54	53	:	:	1
Sweden	58	48	:	:	10
United Kingdom	478	402	2	:	74
European Union (15 countries)	5610	3036	1883	350	341

The total area with oilseeds for Greece, Spain, Italy and Netherlands were not available in New CRONOS and are calculated separately.

Table 4: Total areas (1000 hectares) of oilseeds in the EU Member States (2000)



(Rape missing years: ex-GDR (1980-1987), Ireland (1986-1989), Austria (1980-1991), Finland (1980-1984), Sweden (1980-1984); Sunflower missing years: Germany (1980-2000); Soya missing years: Austria (1980-1989)

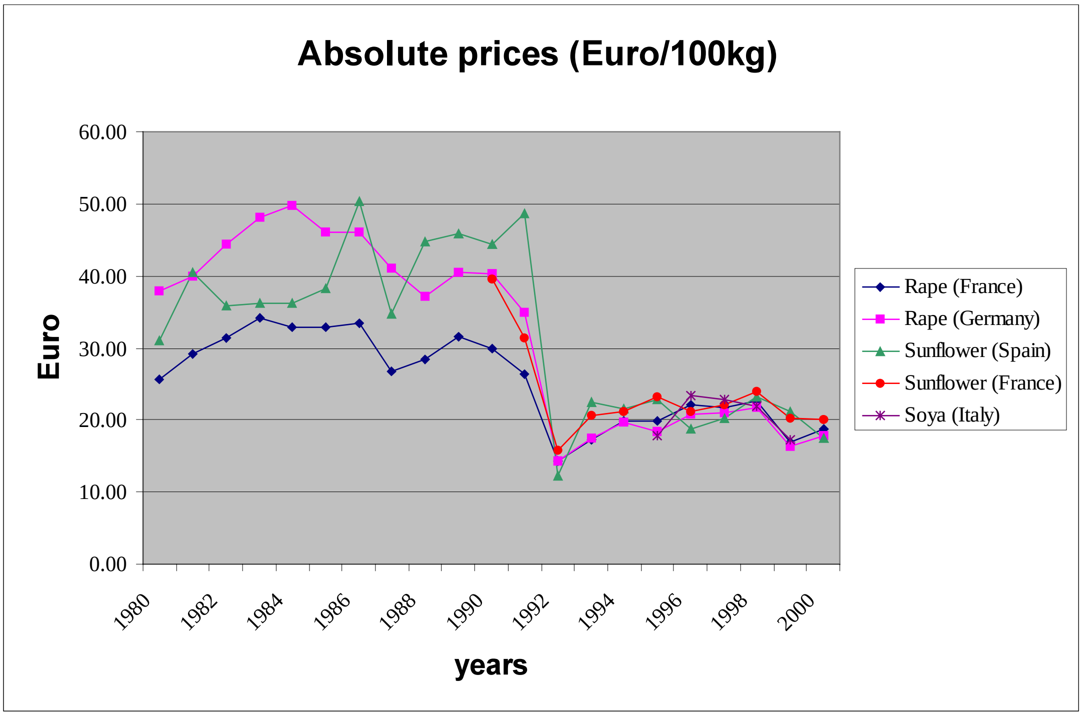
Prices of oilseeds in the EU

Prices	Prices for rape	Prices for sunflower	Prices for soya
Belgium	14.08	:	:
Denmark	19.34	:	:
Germany	16.39	:	:
Greece	:	21.86	:
Spain	:	21.26	19.57
France	16.85	20.20	:
Ireland	:	:	:
Italy	:	17.67	17.20
Luxembourg	15.37	:	:
Netherlands	17.70	:	:
Austria	12.83	14.84	17.31
Portugal	:	20.95	:
Finland	16.85	:	:
Sweden	:	:	:
United Kingdom	18.44	:	:
European Union (15 countries)	16.93	19.95	17.23

Table 5: Prices of oilseeds in Euro the EU Member States (1999)

The absolute prices of rape seed and sunflower seed all fell sharply in 1992. This is caused by the fact that the EU is a price-taker and that since 1992 through the CAP reform policy, the prices for oilseeds are determined by the world price. The purpose of this CAP reform policy was to bring market prices down by lowering the intervention prices, thus narrowing the gap between internal prices and world market prices. On the other hand the level and stability of the farmers income should be ensured by an increase in the direct payment per hectare. After 1992 there was somewhat of a small recovery, but prices have never returned to pre-1992 levels.

In table 5 the absolute prices of the different oilseeds are presented for the year 1999, because prices for 2000 were still missing for Belgium, Italy and the Netherlands. The absolute price for rape seed in 1999 was highest in Denmark, some 2.4 Euro more than the EU average. Of the two main rape seed producing countries (Germany and France), the absolute prices are lying close to each other. The absolute price of sunflower seed in 1999 was highest in Greece, some 2 Euro more than the EU average. The production of sunflower seed in Greece is however very small. The average EU price for sunflower seed in 1999 is mainly determined by France. The production of sunflower seed in Spain was rather low this year. The average EU price for soya beans was almost exclusively determined by the production in Italy.



The development of the absolute price for soya beans is represented by the price series of Italy. The prices are however only available from 1995 to 1999.

Structural data

The Blair House Agreement has a significant impact on the structural aspects of oilseed production. Based on the Farm Structure Surveys of 1990 and 1993, the total number of holdings in the European Union with oilseeds has decreased sharply (-36%), whilst in the same time the production area of oilseeds increased (+12%). As a consequence, the average area of oilseeds per holding increased significantly (table 6). Despite this general trend, there were exceptions among the Member States; the number of holdings with oilseeds in Spain and Portugal increased. The decline in the number of holdings was strongest during this period in Italy (66%). Through 1995 and 1997 the number of holdings with oilseed in the EU-12 countries decreased somewhat further, but at a much reduced rate. Despite the accession of Austria, Finland and Sweden in 1995, and the considerable increase in the number of holdings with oilseeds, the area of oilseed production for the EU-15 remained below that of the EU-12 level in 1993. The effect of the Agenda 2000 measures could not be examined because the data from the Farm Structure Survey of 2000 are unavailable.

The average area of oilseeds per holding with oilseeds is highest in the United Kingdom, followed by Portugal, France, Spain and Germany (table 6). The average area is very low in Austria, Greece and the Netherlands. It is also interesting to look at developments on those holdings that are specialized producers of oilseeds. In order to do so we have selected from the Farm Structure Survey (FSS) those holdings that receive more than two third of their standard gross margin from producing oilseeds. The total number of specialized oilseed producers in the EU (excluding Germany) amounted 27.442 in 1997, about 7,5% of the total number of holdings with oilseeds in the EU (excluding Germany). Of these 27.442 farms, about two-thirds were located in Italy, with the majority of the rest found in Spain (16%) and France (7%). More then 50% of the specialized farms in the EU (excluding Germany) had an average area of less than 5 hectare, while only 1% had an area of more then 100 hectare, reflecting the small-size of the specialized Italian holdings in particular. In Greece, Italy, Austria and Portugal the small farms with an area of less then 5% have a share of respectively 57%, 60%, 74% and 78% of the total number of farms that are specialized in oilseeds.

	1990	1993	1995	1997	Average 1997
Belgium	810	850	1310	940	6.6
Denmark	30980	17940	16090	12180	8.8
Germany	111870	74100	70670	64180	14.8
Greece	11220	9810	8020	8200	3.5
Spain	59220	114880	84230	64500	16.3
France	173150	109040	120950	113180	17.3
Ireland	580	630	710	790	5.7
Italy	133310	44330	61180	92260	7.2
Luxembourg	280	260	260	300	7.5
Netherlands	0	530	700	290	4.9
Austria	:	:	41570	33040	3.3
Portugal	2510	3640	4180	2870	18.1
Finland	:	:	8590	7170	9.2
Sweden	:	:	9980	6220	10.2
United Kingdom	16730	20790	20650	19730	28.6
European Union (15 countries)	540660	396800	449090	425850	13.2

Table 6: Number of holdings in the EU with oilseeds and average size

The Blair House agreement requires for the big farms a set-aside of at least 10 percent of the total area with oilseeds to receive payments, while the so called "small producers" are exempted from set-aside obligations. The Farm Structure Survey for 1997 shows that for France, all the farms in the classes with more then 10 hectares respected this set-aside proportion. In Spain and Greece, however, none of the classes reached this limit, while in Finland all classes have relatively high percentages of set-aside. In Italy only the class with more then 50 and less then 100 hectare reached an average of more then 10% set-aside.

	>0-<5	5-<10	10-<20	20-<30	30-<50	50-<100	>=100	Total
Total number of holdings	14340	6190	3940	1090	970	640	260	27440
Spain	1900	1330	660	200	100	170	80	4430
France	460	430	400	140	250	140	50	1870
Italy	10720	3720	2260	530	400	170	70	17870
Total area	36300	43200	55660	26690	36310	40990	52770	294340
Oilseeds area	32110	37380	46330	20950	27430	28240	29460	222960
Spain	5330	8030	7980	3970	3410	6770	11650	47140
France	1320	2550	4700	2740	6570	6190	4780	28840
Italy	23350	22740	26890	10480	12190	8370	8170	112200
Set aside area	1490	1850	3000	1660	2310	3080	2190	15600
Spain	40	140	500	320	60	310	480	1850
France	80	210	470	280	840	1100	560	3540
Italy	1240	1190	1320	560	590	1220	400	6510

Table 7: Division of holdings and areas of specialized oilseed producers in the EU (excluding Germany) over size classes for 1997

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