



eurostat
Compact guides

Enlargement countries
Agriculture, forestry and fishing

2014 edition

eurostat 

The enlargement process in the EU

The Treaty on European Union (*Article 49*) states that any European country may apply for membership of the European Union (EU) if it respects a range of democratic values — human dignity, freedom, democracy, equality, the rule of law and human rights — and is committed to promoting them.

Enlargement policy has proven to be a powerful tool for transformation: countries that have already become members of the EU and those on the road to joining the EU have undergone far-reaching changes driven by democratic, societal and economic reforms. New members are only admitted once they have demonstrated they will be able to play a full role in the EU, complying with all of the EU's standards and rules. The accession of a new Member State to the EU also requires the consent of the EU institutions, all of the EU Member States and the citizens of the new Member State (expressed through their national parliament or a referendum). The process of ensuring compliance with the EU's standards and rules (the '*acquis*' or the body of EU law) is divided into 35 different policy fields (Chapter 18 covers statistics); these rules are non-negotiable. Those countries wishing to join the EU have to agree on how and when to adopt and implement each of the rules, while the EU seeks guarantees on the date and effectiveness of measures to do this.

As of October 2014, the EU had granted the perspective of membership to eight enlargement countries, six of which have candidate country status: Montenegro, Iceland (*), the former Yugoslav Republic of Macedonia, Albania, Serbia and Turkey. The two remaining countries, Bosnia and Herzegovina and Kosovo (**), are potential candidates.

(*) Accession negotiations started in July 2010 and were put on hold by the Icelandic government in May 2013. Iceland is therefore not included in this publication.

(**) This designation is without prejudice to positions on status, and is in line with UNSCR 1244 and the ICJ Opinion on the Kosovo declaration of independence.

The role of Eurostat

Eurostat follows the progress of enlargement countries in complying with the EU *acquis* in the field of statistics, collecting a wide range of data from each country. The majority of this data from enlargement countries is collected on an annual basis through a questionnaire which is sent to a network of contacts

in each enlargement country. These statistics are considered essential for measuring the progress of reforms in each country, while they are also used to gauge the effectiveness of enlargement policies and assistance programmes.

Enlargement countries are expected to increase progressively the volume and quality of their data and to transmit these to Eurostat in the context of the EU accession process. The data collected are made available free-of-charge on Eurostat's website. In return, Eurostat provides technical assistance and support to each national statistical authority. The ultimate goal is the provision of harmonised, high-quality data that conforms to European and international standards.

The data presented in this compact guide were extracted from Eurostat's database for enlargement countries on 20 October 2014.

The EU's agricultural policy

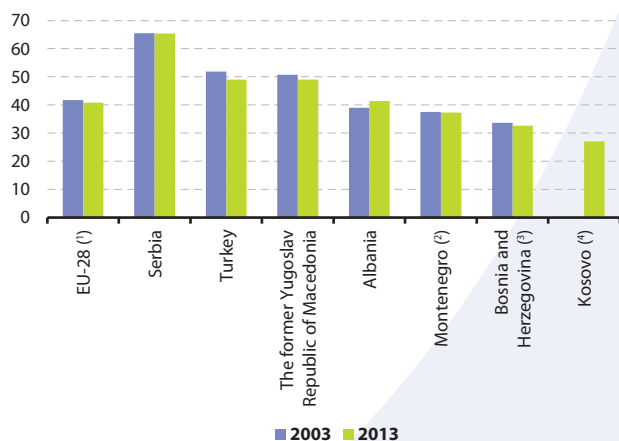
The Common Agricultural Policy (CAP) was launched in 1962. It is a partnership between agriculture and society, as well as between the EU and its farmers. Its initial aim was to improve agricultural productivity so that consumers could have a guaranteed supply of affordable food, while ensuring that EU farmers could make a reasonable living.

Over the last 50 years these goals have been reformed and extended to cover a range of challenges, such as: food security, climate change and the sustainable management of natural resources. The most recent extensive reform of the CAP started in 2010 with a Communication from the European Commission titled 'The CAP towards 2020: meeting the food, natural resources and territorial challenges of the future' (COM(2010) 672 final) and was completed at the end of 2013 with the publication of four basic regulations. These reforms are designed so that the CAP will support farmers to:

- use environmentally sustainable farming methods (for example, to maintain permanent grassland, safeguard landscapes, protect biodiversity and habitats, manage water resources);
- establish new farms (through grants, funding and training initiatives);
- encourage continuity from one farming generation to the next;
- remain in remote or mountainous areas so as to help keep communities alive;
- meet public health, environmental and animal welfare standards;
- produce and market the food specialities of their region;
- make more productive use of forests and woodland;
- diversify their activities into other economic activities (for example, landscape preservation or cultural heritage projects).

Figure 1: Utilised agricultural area, 2003 and 2013

(% of total area)



(1) Data for 2012 instead of 2013. Data for total area: includes data on land area and not total area for Croatia.

(2) 2003: includes the area of fishponds and ponds. 2011 (estimates) instead of 2013.

(3) Utilised agricultural area: consists of arable land, kitchen gardens, permanent crops and permanent grassland as cadastral data.

(4) 2003: not available. 2013: provisional.

Source: Eurostat (online data codes: [cpc_agmain](#), [apro_cpp_luse](#) and [demo_r_d3area](#))

Main statistical findings

The utilised agricultural area (UAA) provides a measure of the area used for all types of farming. The seven enlargement countries had a combined agricultural area of almost 50 million hectares, equivalent to just over one quarter of the area used for agriculture in the EU-28.

Turkey had by far the largest utilised agricultural area among the enlargement countries, at 38.4 million hectares in 2013. Turkey was also one of four enlargement countries where the share of utilised agricultural area in the country's total area (including inland waters) was higher than in the EU-28 (40.8 % in 2012); this proportion reached 41.4 % in Albania, 49.0 % in the former Yugoslav Republic of Macedonia and in Turkey, and 65.4 % in Serbia.

In recent years, the share of area used for agriculture declined in most of the enlargement countries, as well as in the EU-28, although the changes were relatively modest. The biggest decline was recorded in Turkey, with a reduction of 2.8 percentage points between 2003 and 2013. By contrast, Albania was the only enlargement country to record an increase in the relative share of its utilised agricultural area (up 2.4 points).

Table 1: Total area and utilised agricultural area, 2013

	Total area	Utilised agricultural area	
	(thousand hectares)		(% share of total area)
EU-28 (1)	446 265	181 877	40.8
Montenegro (2)	1 381	516	37.4
The former Yugoslav Republic of Macedonia	2 571	1 260	49.0
Albania	2 875	1 190	41.4
Serbia	7 747	5 069	65.4
Turkey	78 356	38 428	49.0
Bosnia and Herzegovina (3)	5 121	1 670	32.6
Kosovo	1 089	295	27.1

(1) Data for 2012. Data for total area: includes data on land area and not total area for Croatia.

(2) Data for 2011.

(3) Utilised agricultural area: consists of arable land, kitchen gardens, permanent crops and permanent grassland as cadastral data.

Source: Eurostat (online data codes: [cpc_agmain](#), [apro_cpp_luse](#) and [demo_r_d3area](#))

Table 2: Analysis of the utilised agricultural area, 2003 and 2013

(% share of utilised agricultural area)

	Arable land		Permanent grassland		Land under permanent crops	
	2003	2013	2003	2013	2003	2013
EU-28 (1)	59.6	61.9	33.9	31.5	6.6	6.4
Montenegro (2)	:	:	:	57.6	:	:
The former Yugoslav Republic of Macedonia	36.3	32.8	60.4	64.3	3.3	2.9
Albania	51.6	52.2	37.6	41.3	10.8	6.5
Serbia (3)	65.9	65.1	28.0	29.2	6.2	5.7
Turkey (4)	57.5	53.6	36.0	38.0	6.5	8.4
Bosnia and Herzegovina (5)	31.9	31.0	62.4	62.6	5.6	6.3
Kosovo	:	66.5	:	31.3	:	2.3

(1) 2012 instead of 2013.

(2) 2011 instead of 2013.

(3) Arable land: includes kitchen gardens. Land under permanent crops, 2003: orchards and vineyards.

(4) Permanent grassland: based on results of 2001 general agricultural census.

(5) Utilised agricultural area: consists of arable land, kitchen gardens, permanent crops and permanent grassland as cadastral data.

Source: Eurostat (online data codes: [cpc_agmain](#) and [apro_cpp_luse](#))

Table 2 provides an analysis of the different types of agricultural land use. It shows that arable land accounted for more than half of the total area utilised for agricultural purposes in Turkey, Albania, Serbia and Kosovo, with its share peaking at 66.5 % in Kosovo. By contrast, permanent grassland accounted for more than half of the agricultural area in Montenegro, Bosnia and Herzegovina, and the former Yugoslav Republic of Macedonia. Land under permanent crops (for example, fruit trees, vines or olive trees) accounted for a much lower share of the utilised agricultural area, ranging from less than 3 % in the former Yugoslav Republic of Macedonia and in Kosovo, to a high of 8.4 % in Turkey.

Table 3: Share of agriculture, forestry and fishing (NACE Rev. 2 Section A) in total economic activity, 2003, 2008 and 2013

(% of total)

	Gross value added			Employment		
	2003	2008	2013	2003	2008	2013
EU-28 (1)	2.0	1.7	1.7	7.0	5.3	4.9
Montenegro (2)	11.6	9.3	8.8	1.8	7.6	4.5
The former Yugoslav Republic of Macedonia (2)	12.9	11.6	10.3	22.1	18.9	18.7
Albania (2)	23.5	19.4	22.2	58.2	44.6	44.6
Serbia (2)	13.3	10.6	11.4	24.1	25.1	21.3
Turkey (2)	9.9	7.6	7.4	33.9	23.7	23.6
Bosnia and Herzegovina (2)	9.5	8.8	8.2	:	20.6	18.9
Kosovo (2)	:	15.1	14.9	:	:	4.6

(1) Employment for 2003: NACE Rev. 1.1 instead of NACE Rev. 2.

(2) 2012 instead of 2013, 2003 and 2008: NACE Rev. 1.1 instead of NACE Rev. 2.

(3) NACE Rev. 1.1 instead of NACE Rev. 2, 2008: breaks in series.

(4) Value added: shares calculated as a percentage of value added plus taxes and subsidies minus financial intermediation services indirectly measured (FISIM). Employment: 2004 instead of 2003. Employment for 2004 and 2008: NACE Rev. 1.1 instead of NACE Rev. 2.

(5) Value added: shares calculated as a percentage of gross value added after deducting financial intermediation services indirectly measured (FISIM); as a result the shares are over estimates. Employment, 2013: includes NACE Rev. 2 Group 98.1.

(6) Value added for 2003 and employment for 2008: NACE Rev. 1.1 instead of NACE Rev. 2.

(7) 2012 instead of 2013. Value added: NACE Rev. 1.1 instead of NACE Rev. 2.

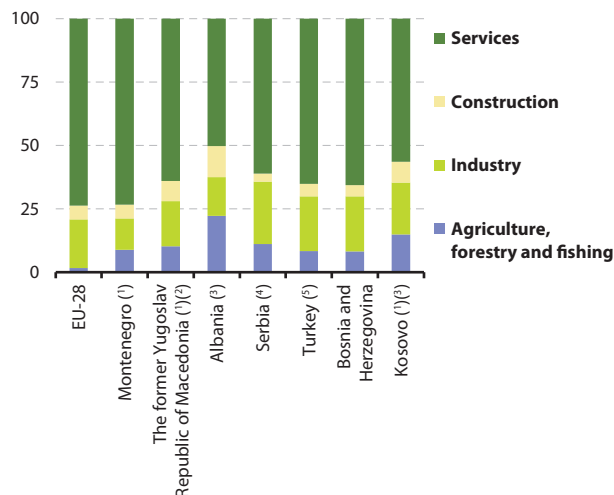
Source: Eurostat (online data codes: [cpc_ecnabr](#), [nama_10_a10](#), [nama_10_a10_e](#), [lfsa_egana](#) and [lfsi_grt_a](#))

Agriculture, forestry and fishing (NACE Rev. 2 Section A) accounted for less than 2 % of the EU-28's gross value added in 2013. These activities contributed a far higher share of total value added in the enlargement economies, ranging from 7.4 % in Turkey to 22.2 % in Albania.

The relative weight of agriculture, forestry and fishing was generally much higher when measured in terms of its contribution to employment, although this was not the case in Montenegro or Kosovo. Aside from these two exceptions, the contribution of agriculture, forestry and fishing to total employment in the enlargement countries ranged from almost one fifth (18.7 %) of the total workforce in the former Yugoslav Republic of Macedonia to close to half (44.6 %) in Albania. Indeed, agriculture, forestry and fishing was the largest employer in the Albanian economy and the second largest employer in the Serbian and Turkish economies (on the basis of the analysis presented in Figure 3).

The production of selected crops reflects, among others, the vagaries of climatic conditions; there were notable contractions in cereals output in 2007 and 2012. Together, the seven enlargement countries produced almost 50 million tonnes of cereals, which was equivalent to 17 % of the EU-28 total. Turkey accounted for almost 90 % of the total volume of fruit and vegetables produced in the enlargement countries in 2013, while its share of total production among the enlargement countries was somewhat lower for oilseeds (80 %), cereals (75 %) and potatoes (approximately 70 %).

Figure 2: Gross value added by economic activity (NACE Rev. 2), 2013 (% of total gross value added)



(1) 2012 instead of 2013.

(2) Provisional.

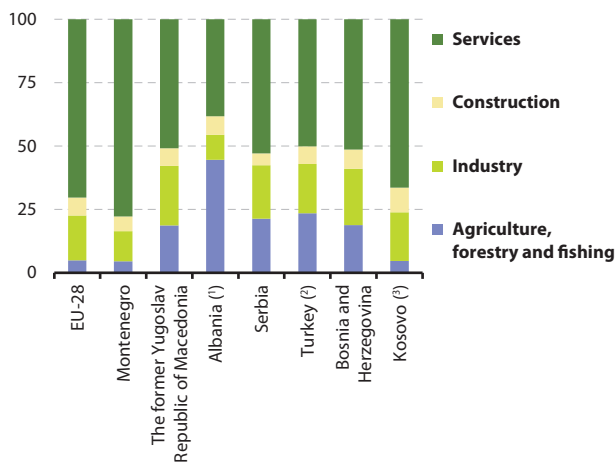
(3) NACE Rev. 1.1 instead of NACE Rev. 2.

(4) Shares initially calculated as a percentage of gross value added after deducting financial intermediation services indirectly measured (FISIM). The resulting shares have been proportionately rescaled to sum to 100 %.

(5) Shares initially calculated as a percentage of value added plus taxes and subsidies minus financial intermediation services indirectly measured (FISIM). The resulting shares have been proportionately rescaled to sum to 100 %.

Source: Eurostat (online data codes: [cpc_ecnabr](#) and [nama_10_a10](#))

Figure 3: Employment by economic activity (NACE Rev. 2), 2013 (% of total employment)



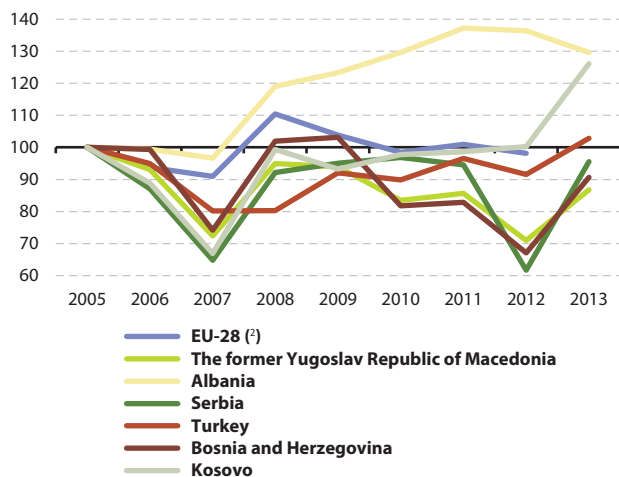
(1) NACE Rev. 1.1 instead of NACE Rev. 2. Estimates.

(2) Agriculture, forestry and fishing: includes NACE Rev. 2 Group 98.1.

(3) 2012 instead of 2013.

Source: Eurostat (online data codes: [cpc_ecnabr](#) and [lfsi_grt_a](#))

Figure 4: Production of cereals (including rice), 2005–13 (¹)
(2005 = 100)



(¹) Montenegro: not available.
(²) 2013: not available.

Source: Eurostat (online data codes: [cpc_agmain](#) and [apro_mk_farm](#))

Table 4: Agricultural production of selected crops, fruit and vegetables, 2003, 2008 and 2013
(thousand tonnes)

	Cereals (including rice)		Oilseeds		Potatoes	
	2003	2013	2003	2013	2003	2013
EU-28 (¹)	253 705	284 826	19 220	29 065	63 608	53 882
Montenegro (²)	4	18	:	:	113	180
The former Yugoslav Republic of Macedonia	466	562	8	9	175	191
Albania	489	662	2	2	158	190
Serbia (³)	5 453	9 157	618	925	679	767
Turkey	30 807	37 489	2 388	3 313	5 300	3 955
Bosnia and Herzegovina	793	1 224	5	10	302	371
Kosovo (⁴)	408	556	:	1	69	51

	Fruit			Vegetables		
	2003	2008	2013	2003	2008	2013
Montenegro (⁵)	:	:	44	:	:	150
The former Yugoslav Republic of Macedonia	103	253	199	681	728	702
Albania (⁶)	77	134	183	675	715	867
Serbia (⁷)	1 229	1 221	1 402	1 172	1 277	1 242
Turkey	14 083	16 782	19 389	25 650	27 218	28 448
Bosnia and Herzegovina (⁸)	186	275	378	204	299	319
Kosovo (⁹)	53	58	67	150	153	185

(¹) Cereals and oilseeds: 2012 instead of 2013.
(²) 2011 instead of 2013. Cereals: break in series; 2003, only wheat.
(³) Cereals, 2003: excluding triticale.
(⁴) 2004 instead of 2003. Oilseeds: 2012 instead of 2013.
(⁵) 2011 instead of 2013.
(⁶) Fruit, 2003 and 2008: fruit tree production only; excluding olives, citrus fruits and grapes.
(⁷) 2003: excluding blackberries. Fruit, 2008: break in series.
(⁸) Fruit, 2003: excluding mandarins, lemons, figs and olives. Vegetables, 2003: including dried pulses. Vegetables, 2008: including lettuce and strawberries.
(⁹) 2004 instead of 2003. 2004: excluding scattered fruit tree production. Fruit, 2008: break in series.

Source: Eurostat (online data codes: [cpc_agmain](#) and [apro_cpp_crop](#))

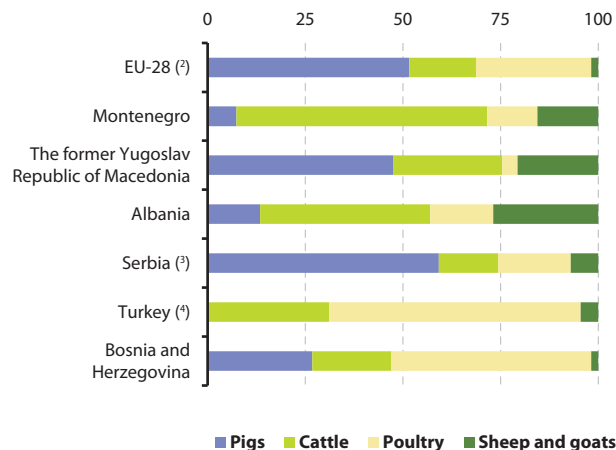
Table 5: Livestock population, December 2003 and 2013
(thousand head)

	Cattle		Pigs		Sheep and goats	
	2003	2013	2003	2013	2003	2013
EU-28 (¹)	91 610	87 619	159 953	146 083	112 300	:
Montenegro	175	89	24	20	252	220
The former Yugoslav Republic of Macedonia	260	238	179	167	1 239	807
Albania	684	468	132	112	2 919	2 734
Serbia (²)	1 102	913	3 439	3 144	1 741	1 841
Turkey (³)	9 788	14 415	7	3	32 203	38 510
Bosnia and Herzegovina (⁴)	453	447	596	530	965	1 089
Kosovo (⁴)	335	321	55	49	106	160

(¹) Sheep and goats: estimate made for the purpose of this publication, excluding Belgium.
(²) 2008: break in series (change of reference date from 15 January).
(³) Cattle: excluding buffaloes.
(⁴) 2004 instead of 2003.

Source: Eurostat (online data codes: [cpc_agmain](#), [apro_mt_lscat](#), [apro_mt_lspig](#), [apro_mt_lssheep](#) and [apro_mt_lsgoat](#))

Figure 5: Slaughtered animal production, 2013 (¹)
(% of total carcass weight)



(¹) Kosovo: not available.
(²) Includes estimates made for the purpose of this publication based on the latest available data for each EU Member State.
(³) Net quantity.
(⁴) Cattle, sheep and goats, 2013: break in series (coverage extended to include production inside and outside of slaughterhouses). Cattle: excluding buffaloes.

Source: Eurostat (online data codes: [cpc_agmain](#) and [apro_mt_pann](#))

Religious and cultural differences, as well as topographical and climatic conditions may, at least in part, explain the distribution of livestock across the enlargement countries. For example, there was a low propensity to farm pigs in several of the enlargement countries, contrary to the pattern observed in Serbia and the EU-28. By contrast, there was a higher propensity to farm sheep and goats in many of the enlargement countries, and there was fairly rapid growth in the number of cattle being farmed in

Table 6: Number of dairy cows and milk production, 2003, 2008 and 2013

	Dairy cows ⁽¹⁾ (thousand head)			Milk production (thousand tonnes)		
	2003	2008	2013	2003	2008	2013
EU-28 ⁽²⁾	25 196	24 406	23 475	149 090	149 336	156 765
Montenegro ⁽³⁾	127	73	61	203	160	159
The former Yugoslav Republic of Macedonia	89	130	129	192	368	381
Albania	443	360	346	1 060	1 040	1 155
Serbia ⁽⁴⁾	672	542	429	1 646	1 621	1 515
Turkey	5 040	4 080	5 607	10 611	12 243	18 224
Bosnia and Herzegovina ⁽⁵⁾	291	297	222	583	737	688
Kosovo ⁽⁶⁾	182	192	179	:	:	:

(1) As of December.

(2) 2004 instead of 2003. Cows' milk only. Dairy cows: EU-27 instead of EU-28 for 2004.

(3) Milk production: 2012 instead of 2013. Milk production: net quantity.

(4) Dairy cows, 2006 and 2007: break in series (change of definition and change of reference date).

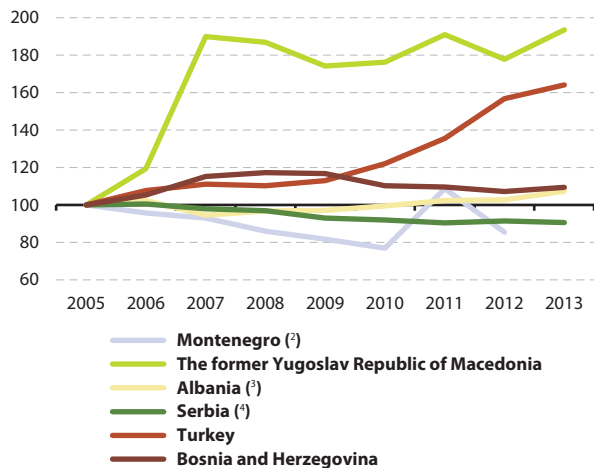
Milk production: milk from cows and sheep used for human consumption or processing.
Milk production: data provided in litres and converted to tonnes (using conversion factor of 1 000 litres = 1,035 tonnes).

(5) 2004 instead of 2003.

Source: Eurostat (online data codes: [cpc_agmain](#), [apro_mt_lscatl](#) and [apro_mk_farm](#))

Figure 6: Milk production, 2005–13 ⁽¹⁾

(2005 = 100)



(1) Kosovo: not available.

(2) Net quantity. 2013: not available.

(3) 2006: estimate.

(4) Milk from cows and sheep used for human consumption or processing. Based on litres instead of tonnes. 2012: estimate.

Source: Eurostat (online data code: [cpc_agmain](#))

Turkey. Unsurprisingly, the increase in the number of dairy cows being raised in Turkey had a knock-on effect in relation to the quantity of milk that was produced. Although the combined dairy herd of the enlargement countries was equivalent to almost one third of the EU-28's dairy herd in 2013, the quantity of milk produced was approximately equivalent to one sixth of the EU-28's output.

Table 7: Forestry indicators, 2003 and 2013

	Forests and wooded area (thousand hectares)		Industrial roundwood removals (underbark) (thousand m ³)	
	2003	2013	2003	2013
EU-28 ⁽¹⁾	176 261	179 477	335 729	338 049
Montenegro ⁽²⁾	554	563	235	253
The former Yugoslav Republic of Macedonia ⁽³⁾	955	989	142	114
Albania	1 041	1 041	40	30
Serbia ⁽⁴⁾	1 950	2 031	873	992
Turkey ⁽⁵⁾	20 703	21 678	7 320	14 424
Bosnia and Herzegovina ⁽⁶⁾	2 821	2 781	2 886	2 689
Kosovo	:	:	:	:

(1) Forests and wooded area: 2000 instead of 2003; 2010 instead of 2013.

(2) Forests and wooded area: forests only.

(3) Forests and wooded area: includes only areas larger than five acres; end of year values.

Industrial roundwood: 2004 instead of 2003.

(4) Industrial roundwood: 2012 instead of 2013.

(5) Forests and wooded area: 2007 instead of 2003; includes karst rocky soils and bare grounds, forest roads and cuttings under electricity lines.

Source: Eurostat (online data codes: [cpc_agfor](#), [for_area](#) and [for_remove](#))

Table 8: Fishery production, 2003 and 2013

(tonnes of live weight)

	Total catch ⁽¹⁾		Aquaculture	
	2003	2013	2003	2013
EU-28 ⁽²⁾	7 357 698	4 418 787	1 355 221	1 318 087
Montenegro ⁽³⁾⁽⁴⁾	1 235	1 389	11	:
The former Yugoslav Republic of Macedonia ⁽⁵⁾	1 486	1 461	0	:
Albania	4 563	5 313	167	1 190
Serbia ⁽⁶⁾	459	5 040	1 608	5 936
Turkey	463 074	339 047	79 943	233 394
Bosnia and Herzegovina	:	:	6 635	2 853
Kosovo	:	:	:	:

(1) Excludes aquaculture.

(2) Total catch: 2012 instead of 2013. Aquaculture: 2009 instead of 2013.

(3) Total catch: 2005 instead of 2003. Aquaculture: 2006 instead of 2003.

(4) Total catch: 2012 instead of 2013.

(5) Aquaculture: production for consumption; young fish are excluded.

Source: Eurostat (online data codes: [cpc_agfish](#), [fish_pr_00](#), [fish_aq_q](#) and [fish_aq_2a](#))

The area of forests and wooded land in the EU-28 rose at a modest pace during the period 2000–10, up by 1.8 % overall. A similar pattern was observed in four of the enlargement countries over the period 2003–13, with the area of forests and wooded land increasing by between 1.6 % in Montenegro (forests only) and 4.7 % in Turkey.

The total fish catch by the five enlargement countries for which data are presented in Table 9 was just over 352 thousand tonnes; this was equivalent to almost 8 % of the catch made by fishermen from the EU-28. Turkey accounted for the vast majority (96 %) of the fish catch in the enlargement countries, several of which are landlocked. While the quantity of the catch in the EU-28 declined by almost 40 % between 2003 and 2012, the size of the catch in Turkey declined by 27 % between 2003 and 2013.

Eurostat's mission is to be the *leading provider of high quality statistics on Europe*. This short guide presents the latest data available for the **European Union (EU) and the enlargement countries in relation to agriculture, forestry and fishing**.

Direct access to statistics on enlargement countries:

The Eurostat online data code, which is given in the source under each table or figure, provides users with a quick and efficient way to access the most up-to-date statistics.

For general information regarding European statistics, please go to the Eurostat website:

<http://ec.europa.eu/eurostat>

For information on statistical classifications, please go to the Eurostat classification server RAMON:

<http://ec.europa.eu/eurostat/ramon>

For more specific questions on statistics in relation to the enlargement countries, please contact:

e-mail: estat-cooperation@ec.europa.eu

fax: (352) 4301-32139

For more information on enlargement policy, or on agricultural and fisheries policies, please go to the following websites:

<http://ec.europa.eu/enlargement/>,

http://ec.europa.eu/agriculture/index_en.htm,

and

http://ec.europa.eu/fisheries/index_en.htm

National statistical offices of the enlargement countries

Montenegro: <http://monstat.org/eng/index.php>

The former Yugoslav Republic of Macedonia :

http://www.stat.gov.mk/default_en.aspx

Albania: <http://www.instat.gov.al/en/home.aspx>

Serbia: <http://webrzs.stat.gov.rs/website>

Turkey: <http://www.turkstat.gov.tr>

Bosnia and Herzegovina: <http://bhas.ba/index.php?lang=en>

Kosovo: <http://ask.rks-gov.net/eng>

Symbols

: Not available

Billion 1 000 million

Italics Value is either an estimate or provisional.

