

EUROPEAN COMMISSION

Brussels, 20.10.2011
SEC(2011) 1153 final/2

CORRIGENDUM:

Annule et remplace le document SEC(2011) 1153 final du 12 octobre 2011
Langue unique EN (page de couverture)

COMMISSION STAFF WORKING PAPER

IMPACT ASSESSMENT

Common Agricultural Policy towards 2020

ANNEX 1

{COM(2011) 625 final}
{COM(2011) 626 final}
{COM(2011) 627 final}
{COM(2011) 628 final}
{COM(2011) 629 final}
{SEC(2011) 1154 final}

Annex 1: Situation and prospects for EU agriculture and rural areas

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List of acronyms and abbreviations

AWU	Annual working units
CAP	Common Agricultural Policy
cwe	Carcass weight equivalent
DG AGRI	Directorate-General for Agriculture and Rural Development
EEA	European Environmental Agency
ESU	European Size Unit
EU	European Union
EU-27	European Union after the enlargement on January, 1 st 2007
EU-25	European Union after the enlargement on May, 1 st 2004
EU-10	Member States that joined the European Union on May, 1 st 2004
EU-2	Bulgaria and Romania
EU-12	All Member States that have joined the EU since May, 1 st 2004
EU-15	Member States of the European Union before May, 1 st 2004
Eurostat	Statistical Office of the European Communities
FADN	Farm Accountancy Data Network
FNVA	Farm Net Value Added
FSS	Farm Structure Survey
GDP	Gross Domestic Product
GVA	Gross Value Added
ha	Hectare
IR	Intermediate region
kg	Kilogram
mio	Million
NACE	Statistical Classification of Economic Activities in the European Community
NUTS	Nomenclature of Territorial Units for Statistics
OECD	Organisation for Economic Co-operation and Development
PR	Predominantly rural region
SME	Small and medium sized enterprises
SMP	Skimmed Milk Powder
t	Metric tonne
UAA	Utilised Agricultural Area
US	United States of America
USD	US Dollar

1. OVERVIEW OF THE COMMON AGRICULTURAL POLICY (CAP)

The CAP has undergone fundamental reforms over time to respond to changing economic conditions as well as to evolving societal expectations and demands. Policy drivers and challenges of today are not only related to agriculture *per se*, but also extend to the wider institutional and economic setting within which the policy evolves.

EU agriculture is facing an ever wider range of challenges that the CAP has to address, including:

- Increased globalisation with greater integration of national economies into the world economy and thus greater inter-dependencies and more competitive pressure on agriculture. The impact of the economic crisis on agriculture is a notable example.
- Increased price volatility for agricultural products, which is strongly linked to developments in other commodity and energy markets.
- Increasing environmental pressures on agriculture and rural areas, in particular relating to the effects of climate change, water availability and quality, and the need to halt biodiversity loss.
- Food security issues. A growing world population and changing consumption patterns put a strain on global resources to supply adequate amounts of food. Recent developments have raised concerns related to food security, particularly concerning the impact of climate change on supply variation, and thereby on the availability of food.

1.1. Historical development of the CAP

The CAP has its roots in Western Europe of the 1950s, where societies had suffered from years of war, and where agriculture had been crippled and food supplies could not be guaranteed. The CAP aimed at improving productivity in the food chain, ensuring a fair standard of living for the agricultural community, stabilising markets and ensuring the availability of food supplies to EU consumers at reasonable prices. Incentives to produce were provided through a system of high support prices to farmers, combined with border protection and export support. Financial assistance was also granted for the restructuring of farming, for example by aiding farm investment, aiming to ensure that farms developed in size and in management and technological skills so that they could adapt to the economic and social climate of the day.

Although the CAP was very successful in moving the EU towards self-sufficiency, by the 1980s the EU had to contend with almost permanent surpluses of the major farm commodities, some of which were exported (with the help of subsidies), others of which had to be stored or disposed of within the EU. These measures had a high budgetary cost, distorted some world markets, did not always serve the best interests of farmers and became unpopular with consumers and taxpayers. At the same time society became increasingly concerned about the environmental sustainability of agriculture.

This led to a fundamental reform process of the CAP which started in 1992 and was later deepened and extended in 1999 with Agenda 2000, which started the shift from product support (through prices) to producer support (through income support). In substance this reform process was the starting point for the reduction in support prices and the

introduction of direct payments for a few key agricultural sectors. It also introduced a comprehensive rural development policy as a second pillar of the CAP which encouraged many rural initiatives while also helping farmers to diversify, to improve their product marketing and to otherwise restructure their businesses.

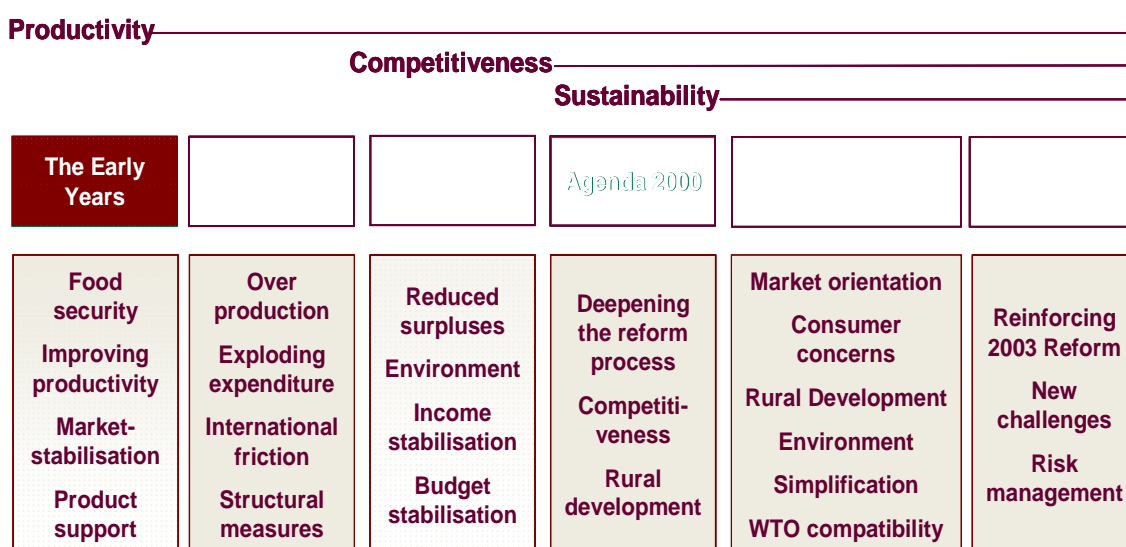
Agenda 2000 explicitly established economic, social, and environmental goals within a reformulated set of objectives for the CAP consistent with the requirements of the Amsterdam Treaty. This had the aim of giving concrete form to a European Model of Agriculture and preserving the diversity of farming systems spread throughout Europe, including in regions with specific problems, in the years ahead. These objectives involved better market orientation and increased competitiveness, food safety and quality, stabilisation of agricultural incomes, integration of environmental concerns into agricultural policy, developing the vitality of rural areas, simplification and strengthened decentralisation.

The regular and consistent adjustment of the CAP to pressures from European society and its evolving economy was again illustrated by the new set of reforms initiated in 2003 and continued in 2008/09 with the Health Check, which aimed at enhancing the competitiveness of the farm sector, promoting a market-oriented, sustainable agriculture and strengthening rural development policy.

Income support has now become almost fully decoupled from production activity, thus allowing EU farmers to make their economic decisions on the basis of market signals. In addition, income support is linked to the respect of standards on environment, food safety and quality and animal welfare that society requests and that EU Member States have implemented through cross-compliance.

The rural development policy for the 2007-2013 programming period focuses on three core objectives, namely improving the competitiveness of the farming and forestry sectors, improving the environment and the countryside through support for land management, and improving the quality of life in rural areas and encouraging the diversification of the rural economy.

Figure 1 Historical development of the CAP



1.2. Effectiveness and efficiency of policy instruments

The most recent wave of policy reform has considerably improved the performance of the EU's agricultural policy. It now provides better value for money by supporting and targeting more accurately what taxpayers, citizens and consumers have demanded:

- More market orientation, and thus increased competitiveness;
- Direct support to producers which helps to keep farming in place and to deliver public goods concerning the environment, food safety, food quality and animal welfare which are not compensated for by market mechanisms;
- More incentives to improve standards and promote sustainability in our rural areas.

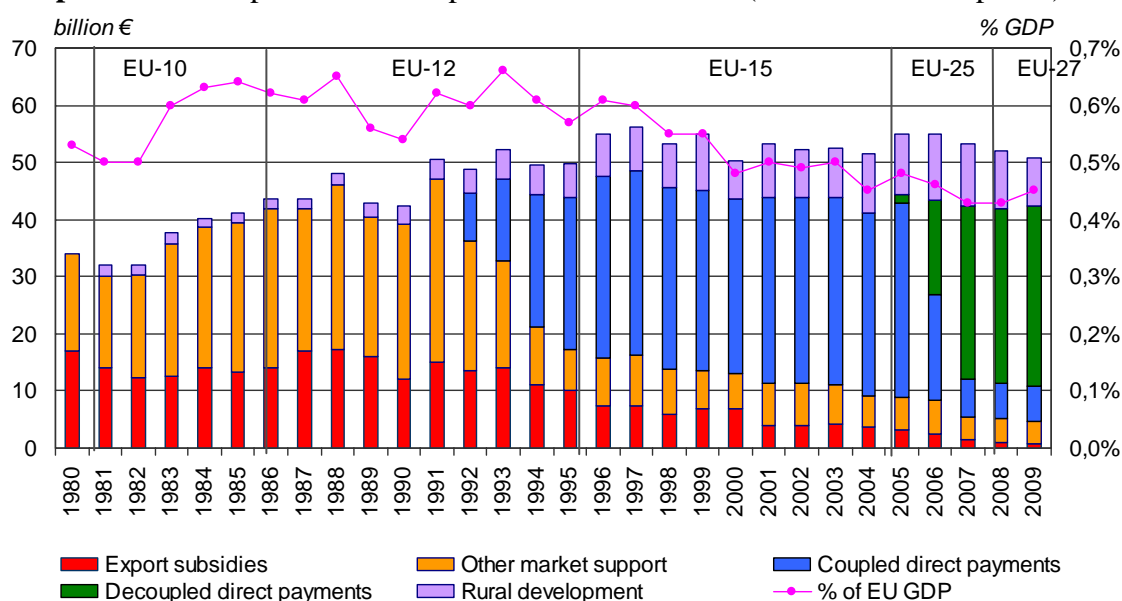
The fundamental shift in emphasis from price support to income support, and from product to producer support (together with a broader range of rural development policy instruments) has allowed market forces to play a greater role in guiding the allocation of resources, resulting in lower market and trade distortions.

The implementation of the single payment scheme constitutes a major improvement in terms of the degree of decoupling. OECD research¹ has shown that such measures have considerably smaller potential production impacts than the price support measures or area payments they have replaced. This has significantly improved the effectiveness and efficiency of the CAP in providing income support.

1.3. Level and composition of budgetary support

These changes in the policy mix together with the introduction of the mechanisms of modulation and financial discipline (in order to keep agricultural expenditure under the financial ceilings set in the financial perspectives for 2007-2013) have significantly changed the level and composition of the financial support to the agricultural sector and rural areas. They have also made the CAP expenditure more stable and predictable.

Graph 1 The path of CAP expenditure 1980 – 2009 (in 2007 constant prices)



Source: European Commission, DG AGRI

¹ OECD (2006), Decoupling: policy implications, Paris

Most of the CAP budget is now spent on decoupled payments and direct aids, while market and export support (that used to constitute the bulk of the CAP expenditure) captured only 9% of the CAP budget in the period 2007-2009. Support under rural development has also steadily increased, representing 19% of the total CAP budget in 2007-2009.

Whereas the CAP used to represent a very significant proportion of EU budget expenditure in its early years of existence, its share of the total EU budget has dramatically fallen in line with the growth of EU activities in other policy areas, stricter budgetary discipline and a series of reforms.

The CAP currently absorbs around 41% of the EU budget (as compared to over 60% in 1989). Whereas 0.5% of the EU GDP was spent in the beginning of the 2000s on supporting EU farmers and rural areas, that figure stands at 0.45% in 2009 and is expected to fall further by 2013.

2. SITUATION FOR EU AGRICULTURE AND RURAL AREAS

2.1. Role of agriculture in the economy and in the environment

2.1.1. Role of agriculture and food industry in the economy

The combined agricultural and food sector accounted for 16.8 mio jobs (7.6% of total employment) and for 3.5% of total gross value added (GVA) in the EU-27 in 2009 (most of the food sector activity depends upon the production of the primary sector).²

There are, however, significant variations across Member States. The agri-food sector is relatively more important in the EU-12, in particular for employment in the primary sector in rural areas.

The primary sector

With 12.1 mio persons employed in 2009 in the EU-27, the primary sector (agriculture, hunting and forestry) represents 5.4% of the total employment for the EU-27, ranging from 1% in the United Kingdom to around 28% in Romania, 20% in Bulgaria and 13% in Poland.³

In terms of value-added, the EU-27 primary sector reached €168 billion in 2009 and accounted for 1.6% of the total GVA, ranging from less than 0.5% in Luxemburg to around 8% in Bulgaria and 7% in Romania (see graph 2).

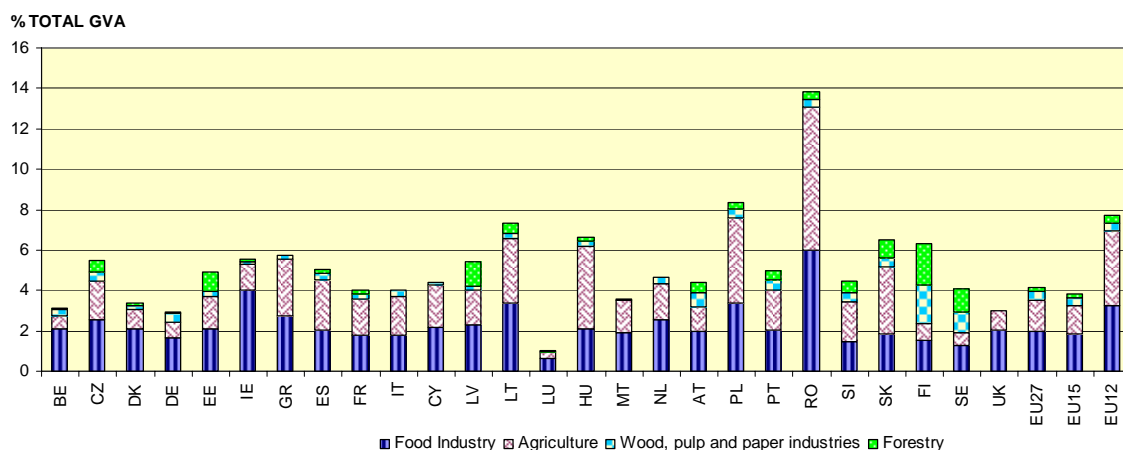
The importance of the primary sector in the economy of the EU-27 is declining, supported by the significant productivity gains of labour and capital and the sharp decline in real prices. Between 2000 and 2009, its share in the overall economy diminished by 1.4 percentage points in terms of employment and by 0.7 percentage points in terms of

² Due to the restricted availability of regional statistical data for the agri-food sector, it is defined here as the combination of the primary sector (branch A: agriculture, hunting, fishing and forestry) and the food industry (branch DA: Manufacture of food products; beverages and tobacco).

³ In the Economic Accounts, the classification of persons by branch is on the basis of their main activity. The data presented therefore cover only persons working mainly in the primary sector, and not all the persons that are directly involved in agriculture or forestry, which are much more numerous.

value-added. In the period 2001-2009, the number of jobs decreased by 2.8 mio (or -2.3% per year), with the highest rates observed in Lithuania (-7% per year), Poland and Romania (both -6%). The value added decreased by €20 billion between 2000 and 2009. The relative volume increase during the period 2000-2009 was +0.7% per year, ranging from -4.6% in Denmark to +12% in Slovakia.

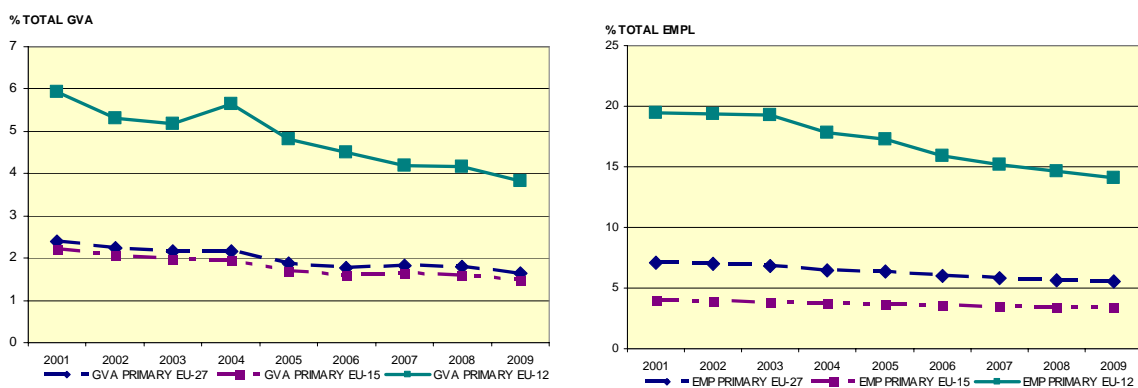
Graph 2 Contribution of the agri-food and forest sectors to the economy: share in total GVA, 2008 (*)



Source: EUROSTAT, Economic Accounts

- (*) - No data available for BG
- The data of IE and ES refer to 2006; AT refer to 2007; UK and PL refer to 2005
- The data of wood, pulp and paper industries and forestry in UK are not available.

Graph 3 Importance of the primary sector in the total GVA and employment 2001-2009.



Source: Eurostat, Economic Accounts

Nonetheless, the primary sector still plays a major role in some regions. For example, in 2008 its contribution to the total GVA was higher than 25% in Kardzhaly and Silistra in Bulgaria and at around 20% in Ileia and Pella in Greece.⁴ Likewise, its share of employment stood above 50% in the regions Ialomita, Vaslui, Calarasi and Teleorman in Romania and the regions of Yambol and Silistra in Bulgaria.

⁴ Regions are defined here at NUTS level 3 and primary sector also covers fishing (Branches A_B of the NACE classification)

At EU-27 level, agriculture and forestry occupy 47% and 30% of the territory, respectively. These levels differ greatly among Member States, forest being the dominant land cover in Nordic (Estonia, Finland, Sweden) and mountainous (Slovenia, Austria) Member States. At EU-27 level, the share of agricultural area in the territory is proportionally lower in rural areas (40%) than in urban areas (53%) due to the importance of forests in many rural regions. Between 1990 and 2000, urbanization has led to the loss of agricultural land especially in the major centres of population. This shift is partly offset by a conversion of forest and semi-natural land to agriculture.

At Member State level, conversion of forest and semi-natural marginal land to agriculture appears to be taking place in Spain and Greece, while there are clear patterns of land abandonment or withdrawal of farming in marginal areas elsewhere in the EU.⁵ Such trends can be observed in many of the mountainous regions of the EU, and in Hungary, Slovakia, Portugal and Italy, as well as in some parts of Germany, where arable land has been transformed to forest through the process of natural regeneration.

Forests play a major role not only for the environment but also for the economy of some Member States and rural areas. With around 129 mio ha, the forest available for wood supply represents 72% of the total forest area for the EU-27 (this share of productive forest is much lower in Mediterranean Member States).

In 2009 forestry and logging represented only 0.2% of the total GVA at EU-27 level, though the contribution of the forest sector as a whole (i.e. including wood, pulp and paper industries) represented 0.6% of total GVA. It can be quite important at Member State level.⁶ This is the case in Finland and Sweden (3.9% and 2.1% of total GVA respectively) and to a lesser extent in Estonia, Austria, Czech Republic and Slovakia (around 1% of total GVA). However, the GVA share of the forest sector as a whole decreased between 2000 and 2009 in most Member States, especially in Sweden and Finland, whereas this ratio remained stable in the Czech Republic, Estonia, Latvia, Lithuania and Romania, following a shift of production and investments from Western to Central and Eastern Europe. The number of employees of the forestry sector decreased over the period 2000-2009 except in Latvia, Sweden and Finland.

Food industry

In 2009 the food industry accounted for 4.8 mio jobs (2.1% of total employment) and 1.9% of total GVA for the EU-27. It is relatively more important in the EU-12 than in the EU-15 and especially in the following Member States: Romania, Ireland, Lithuania, Greece and Bulgaria. Between 2000 and 2009 the food industry has experienced a decrease in employment and an increase in the GVA at EU-27 level.

The EU is the world's largest producer of food and beverages, with a turnover estimated at €65 billion in 2008. The food industry sector remains highly polarised and fragmented in terms of size (SMEs account for 99% of firms, 62.5% of the work force and about 45.5% of total value added).⁷

⁵ This is due in part to the limited area of good agricultural land and the loss of the best areas through urbanisation, and in part to the expansion of more intensive agricultural practices which include the expansion of irrigated crops in the Mediterranean region. European Environment Agency, Land Accounts for Europe 1990-2000.

⁶ The forest sector excludes furniture industry.

⁷ CIAA Annual Report 2009.

In terms of value added, the largest activity is the manufacture of bread, sugar, confectionary and other food products (36% of the total sectoral value added), followed by beverages and meat processing (17.3% and 15.3% respectively) and by dairy products (around 9%).⁸

A number of EU regions are highly specialised in the food industry in terms of employment with at least 5% of total employment: La Rioja and Navarra in Spain, Bretagne and Pays de la Loire in France, Dél-Alföld and Észak-Alföld in Hungary, Açores in Portugal or Wielkopolskie in Poland.

Whereas the employment *on farms* decreased significantly over the last few years, the average annual decrease in the food industry was 0.8% over the period 2000-2009. Employment in the food industry even grew in some Member States (Greece, Spain and Poland) with annual increase over 5% in several regions.⁹

2.1.2. *Role of agriculture and forestry for the environment*

As highlighted above, in 2006 agriculture and forestry represent together 77% of land cover in the EU-27, ranging from 55% in Malta to 93% in Poland.¹⁰ Agriculture and forestry therefore continue to have a significant impact on the environment and to play a major role in maintaining natural resources and cultural landscapes as a precondition for other human activities in rural areas. Different types of agricultural practices and land use have an effect on natural resources, notably biodiversity, water and soil, and climate change.

Biodiversity

The link between certain types of farming and 'natural values' is widely acknowledged and complex at the same time. In some cases, agriculture is associated with valuable habitats with an high level of biodiversity. It is estimated that high nature value farmland covers more than 20% of the agricultural area in most Member States (even more than 30% in some of them).¹¹ More generally, 16% of the utilised agricultural area (UAA) in the EU-27 is located in mountainous areas, where agriculture contributes to maintaining biodiversity.¹² Appropriate methods of production, such as extensive farming, may also support biodiversity. Extensive arable crops and extensive grazing represent on average 15.8% and 22.8% respectively of the total utilized agricultural area in the EU-27.¹³

⁸ For EU-27 in 2006 – Eurostat - European business – facts and figures 2009 edition

⁹ e.g. Sardegna (IT), Dolnoslaskie, Warmisnko-Mazurskie and Lubuskie (PL), Kent (UK), West-Vlaanderen (BE), Brandenburg (DE)

¹⁰ Source: Rural Development in the EU, Statistical and Economic Information Report 2010 (DG Agriculture and Rural Development). Estimation from the CORINE land cover 2006 database (CLC2006). Data for UK and EL come from CLC2000.

¹¹ Source: JRC/EEA 2007. The concept of High Nature Value Farmland is still under development. The current methodology does not seem fully satisfactory in some Member States (e.g. Finland and Slovakia) which therefore often use national definitions. Malta is not included in the calculations

¹² Source: DG AGRI - MS specific communication and CAP-IDIM, 2005.

¹³ Source: FSS, crop production and land use, 2007. Extensive agriculture for arable crops is defined as area under production (except forage crops) when the regional yield is less than 60% of EU27 average. Extensive agriculture for grazing livestock production is considered when the density is less than 1 Livestock Unit per hectare of forage area.

The implementation of Natura 2000¹⁴ represents a significant contribution to the preservation of biodiversity. It is estimated that the designated sites approximately cover 10% of the agricultural area of the EU-27 and more than 15% in six Member States (Bulgaria, Greece, Spain, Portugal, Slovenia, Slovakia).¹⁵ 24% of the total forest area belongs to Natura 2000 sites, this share being higher than 40% in several Member States.

However, a decline in the population of farmland birds, largely attributed to intensive farming, can be observed in many Member States, although the situation seems to go towards a stabilisation at EU level from 1996 onwards..¹⁶

Water Quality

Water quality is influenced by several human activities, yet agriculture plays an important role and can have significant impacts for some of its features. Although the concentration of nitrates in surface water has decreased over the last years in most Member States, significant surpluses of nutrients (+83 kg/ha for Nitrogen and +10 kg/ha for Phosphorus at EU-15 level and higher for example in Belgium, Denmark, Germany, Luxembourg, Netherlands for both Nitrogen and Phosphorus and Italy, Portugal, United Kingdom for Phosphorus)¹⁷ reveal that farming practices still remain too intensive in some parts of the EU. The pressure from agriculture on water use is also critical in some regions as the share of irrigated area is higher than 20% of the agricultural area in several Member States.¹⁸

Forests can contribute to the protection of water: at EU-27 level, 11% of the forests and other wooded land area is managed so as to protect water and soil, this figure reaching 20% or more in four Member States (Belgium, Germany, Poland, Romania).¹⁹ However, this management does not cover all the EU-27.

Soil erosion

Soil erosion is increasing in Europe. As precise estimates are not available at EU-level, owing to the lack of comparable data, it is difficult to assess the total area of the EU affected by erosion. The EEA estimated in 1995 that 115 million ha, or 12% of Europe's total land area, were affected by water erosion and that 42 million ha were affected by wind erosion, of which 2% were severely affected.²⁰

¹⁴ http://ec.europa.eu/environment/nature/natura2000/index_en.htm

¹⁵ Source: Natura 2000 spatial database (mid 2010) and Corine Land Cover 2006 (EEA)

¹⁶ Attention should be given to long-term trends as short-term variations are mainly influenced by weather conditions. However interpretation of the results should be given with caution since some changes in the methodology during the nineties can limit the validity of long-term trends. Pan-European Common Bird Monitoring Scheme, The state of Europe's common birds 2008, p. 6.

¹⁷ These figures refer to average 2002-2004. Source: OECD, Environmental indicators for agriculture, Vol.4, 2006.

¹⁸ Source: Eurostat, FSS 2007.

¹⁹ Source: Ministerial Conference on the Protection of Forests in Europe (MCPFE), 2007. The figures refer to 2005.

²⁰ As quoted in the Commission Communication (COM(2006) 231). Source: EEA, Chapter 7: Soil in Europe's Environment: the Dobbris Assessment, 1995.

It is also estimated that water erosion in the Mediterranean region, which is particularly prone to this phenomenon, could result in the loss of 20-40 t/ha of soil after a single cloudburst, and in extreme cases the soil loss could be over 100 t/ha.²¹

Moreover, according to the PESERA model which provides the only Europe-wide estimates of water erosion that are based on a harmonised approach and standard data sets, soil loss by running water can amount to more than 2 tons/ha/year in some Member States, especially in the Mediterranean countries.²²

Organic Agriculture

An increasing part of agricultural area is now devoted to organic production, with an estimated 7.6 mio ha in 2008, i.e. 4.3% of UAA in the EU-27. In the period 2000-2008, the average annual rate of growth was 6.7% in the EU-15 and 20.0% in the EU-12. Even if in some Member States the agricultural area under organic farming is still much lower than the EU average, it is close to or higher than 9% of the total UAA in the following five Member States: Austria (15.5%), Sweden (10.9%), Estonia (10.9%), the Czech Republic (9.0%) and Latvia (8.9%).

In 2008, it is estimated that there were about 197 000 holdings involved in organic agriculture in the EU-27, i.e. 1.4% of all EU-27 holdings (0.6% in the EU-12 and 2.9% in the EU-15).

Consumer demand for organic food grows at a fast pace in the largest EU markets, yet the organic sector did not represent more than 2% of total food expenses in the EU-15 in 2007. In the EU-12 organic food consumption stands at lower levels.²³

Climate change

With 471 mio tonnes of CO₂ equivalents, agriculture produced 9.6% of the EU emissions of greenhouse gases in 2008. However, with an average annual decrease of 0.7% between 2000 and 2008 - linked to improved production methods and diminishing cattle numbers - greenhouse gas emissions from agriculture have been decreasing at a quicker pace than those from other sectors of the economy.²⁴ The production of renewable resources from agriculture amounted to 11.8 mio t of oil equivalent in 2008 and the area devoted to this purpose in 2008 is estimated at around 5.5 mio ha.²⁵ The production of renewable resources from forestry reached 69 mio t of oil equivalent at EU-27 level in 2008 and grew at an average annual rate of 3.7% over the period 2000-2008.²⁶

²¹ Source: Joint Research Centre, European Commission, Project on Sustainable Agriculture and Soil Conservation (SoCo), Final Report "Addressing soil degradation in EU agriculture: relevant processes, practices and policies", 2009.

²² Joint Research Centre, PESERA project, 2004.

²³ Source: An analysis of the EU organic sector, DG AGRI. June 2010

²⁴ Source: Eurostat.

²⁵ Source: Rural Development in the EU, Statistical and Economic Information Report 2010 (DG Agriculture and Rural Development). EurObserver, 2008 for production of renewable energy and DG AGRI, 2007 for the area devoted to renewable energy.

²⁶ Source: Eurostat, Energy Statistics.

2.2. Structural changes

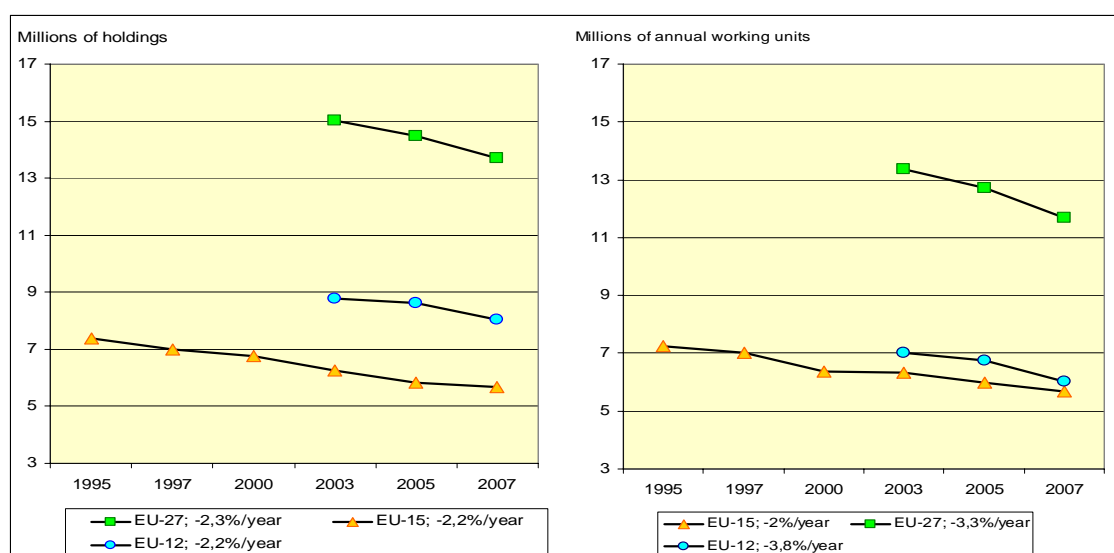
The structure of the agricultural sector shows a wide diversity across Member States/regions and sub-sectors, owing to the national specificities regarding agricultural history, climatic and natural conditions and the institutional framework (notably for the land, labour and capital markets). This diversity, which is reflected in the size, type and socio-economic performance of agricultural holdings, has been further reinforced by the successive enlargements of the EU. Bringing together more than 8 mio farmers, the patterns and drivers of structural change in the EU-12 differ in nature and intensity from those of the EU-15.

Productivity gains largely supported by technological progress (e.g. mechanisation, development in crop and animal genetics) as well as the overall economic pressures have driven a considerable structural adjustment over the last decades. Yet, the CAP has certainly contributed to cushion this long-term process, thus allowing the maintenance of structural diversity in the agricultural sector of the EU and the slowdown of labour outflow from the farm sector.

2.2.1. Agricultural holdings and labour force

In 2007 in the EU-27 there were 13.7 million agricultural holdings (5.6 in the EU-15, more than 8 in the EU-12). The number of agricultural holdings is decreasing at an annual rate of 2.2% both in the EU-15 and in the EU-12. Romania (3.9 million holdings), Poland (2.4 mio) and Italy (1.7 mio) are the Member States with the largest numbers of farms, with Romania alone representing 29% of all holdings in the EU-27. Similarly to the number of holdings, the agricultural labour force fell by around 2.0% per year between 1995 and 2007 in the EU-15. It now stands at 11.7 mio AWU for the EU-27, of which less than 1 mio correspond to non-regular workers.

Graph 4 Evolution of the number of agricultural holdings and of the labour force (AWU) in the EU - 1995-2007

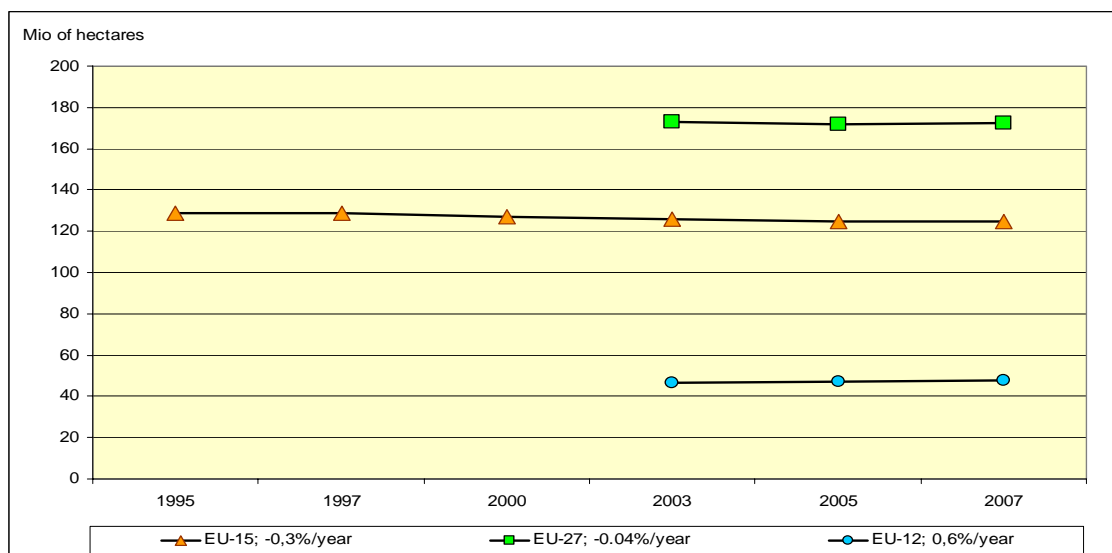


Source: Eurostat, Farm Structure Survey, 1995-2007

2.2.2. Agricultural area

By contrast, the UAA, which amounted to 172 mio ha for the EU-27 in 2007, has remained relatively stable over the last decade, with only a slight decline (-0.3% per year between 1995 and 2007) in the EU-15. However, although the majority of farms are located in the EU-12, more than 70% of the UAA is located in the EU-15.

Graph 5 Evolution of UAA in the EU - 1995-2007



Source: Eurostat, Farm Structure Survey, 1995-2007

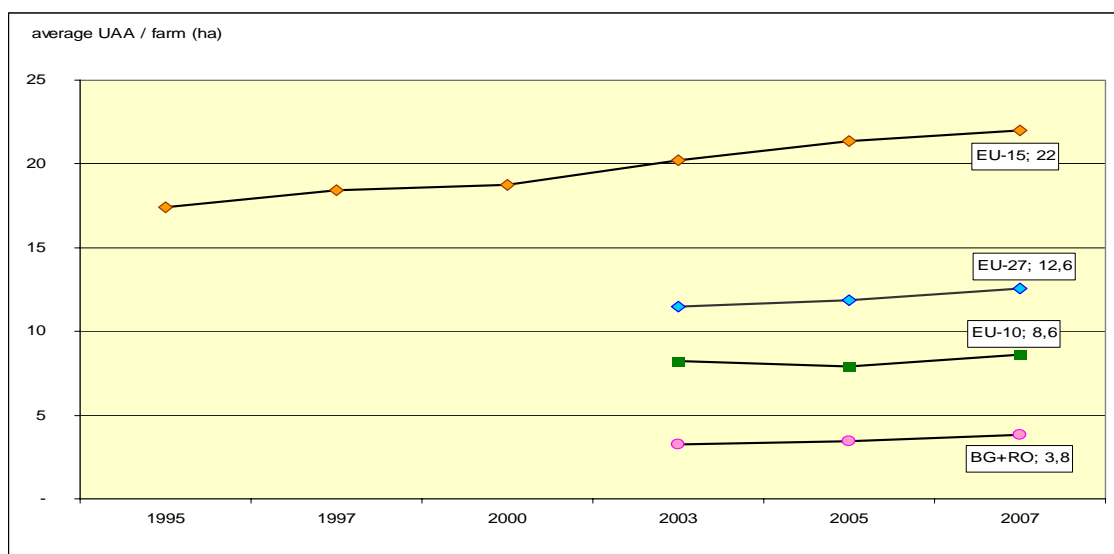
In terms of activities, the area devoted to arable crops and olive plantations increased over the years while permanent grassland and vineyards decreased, but changes in land use composition were globally limited. In 2007, 68% of the agricultural area of the EU-27 was used for arable crops, 25% for permanent grassland and 7% for permanent crops, the share of arable crops being significantly higher in the EU-12 than in the EU-15 (76% and 64% respectively).

Farm types also remained rather stable over the last two decades, with 61% of farms specialised in one sector. The most noticeable change was the very significant increase of farms specialised in olive production, mainly to the detriment of mixed farms. The most important types are farms specialised in field crops (20%), farms specialised in permanent crops (18%) and farms specialised in grazing livestock (16%). Fewer farms are specialised in the production of pigs and poultry (5%) or in horticulture (2%).

2.2.3. Size and distribution of farms

With the restructuring of the sector, the average physical farm size increased from 17 ha in 1995 to 22 ha in 2007 for the EU-15. However, due to the high share of small farms in most EU-12 Member States, the average farm size only reaches 6.0 ha for the EU-12 and 12.6 ha for the EU-27 in 2007.

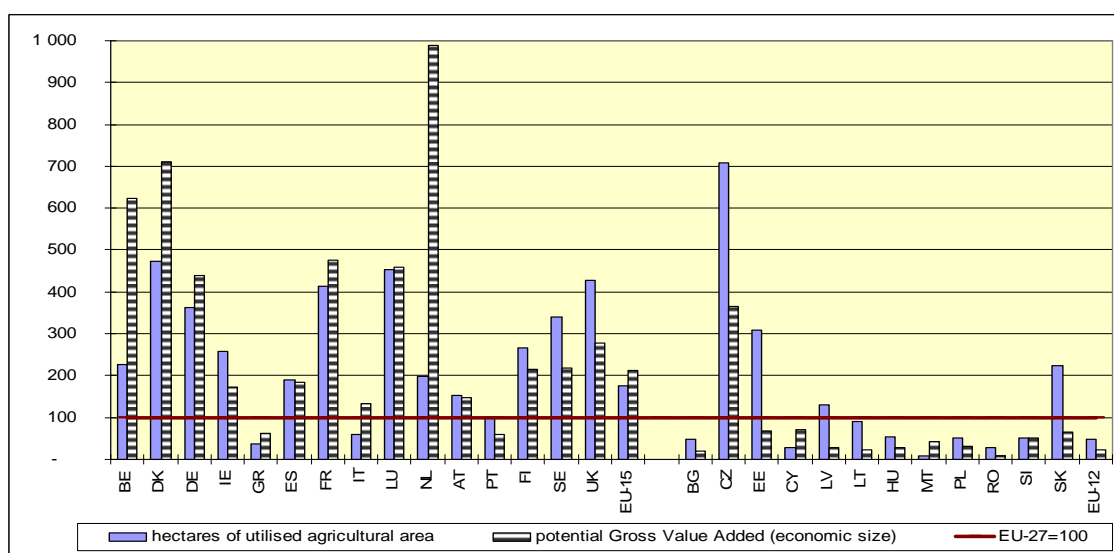
Graph 6 Development of the average physical farm size in the EU - 1995-2007



Source: Eurostat, Farm Structure Survey, 1995-2007

The average farm size varies from more than 50 ha in five Member States (Czech Republic, Denmark, Luxembourg, the United Kingdom and France) to less than 5 ha in four others (Malta, Romania, Cyprus and Greece). Differences are even larger when considering the economic size of the farms (potential GVA), which takes into account the potential economic productivity of the area used.

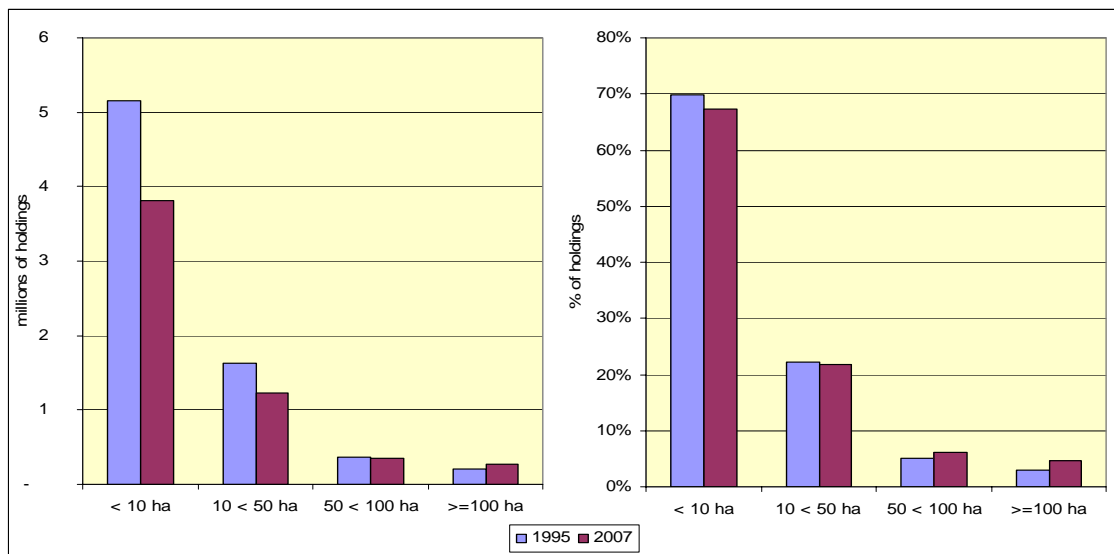
Graph 7 Average physical and economic farm size in Member States - 2007 (EU-27 = 100)



Source: Eurostat, Farm Structure Survey, 2007

Despite the increase in average physical farm size, structural adjustment of the sector occurs at a slow pace. As an example, the number of farms with less than 10 ha decreased by 1.3 mio between 1995 and 2007 in the EU-15, but their share in the total of holdings only decreased from 70% to 67%.

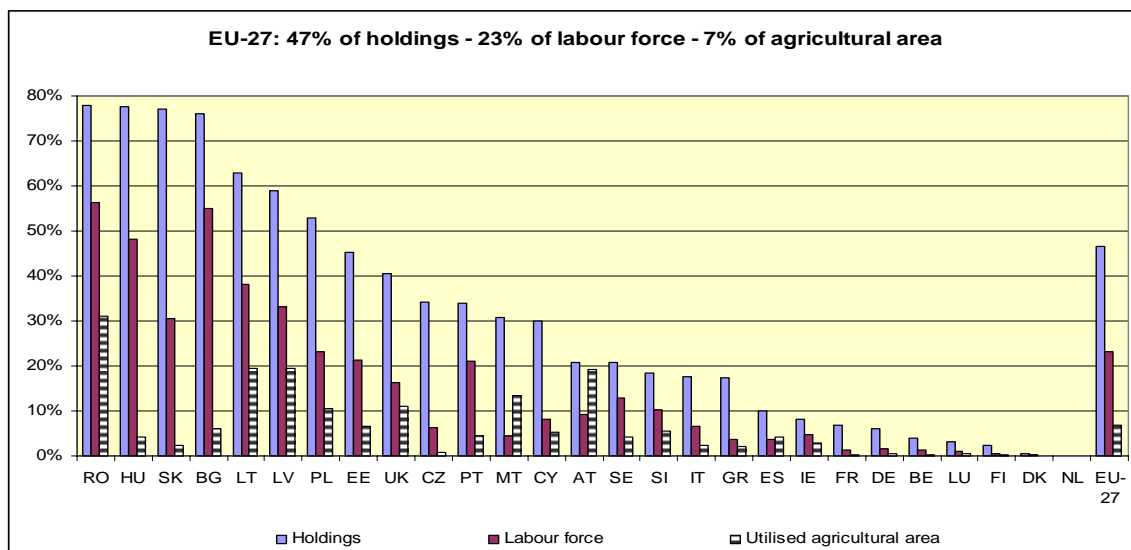
Graph 8 Distribution of holdings by size class in hectares of UAA in the EU-15 – 1995-2007



Source: Eurostat, Farm Structure Survey, 1995 and 2007

In 2007, in 17 Member States 50% of the holdings had less than 10 ha and there were still 6.4 mio farms in the EU with a (potential) GVA of less than €1 200 per year, employing 23% of the total labour force but covering only 7% of the UAA.

Graph 9 Importance of holdings of very small size (less than 1 European Size Unit = €1 200 of potential GVA) in the EU – 2007²⁷

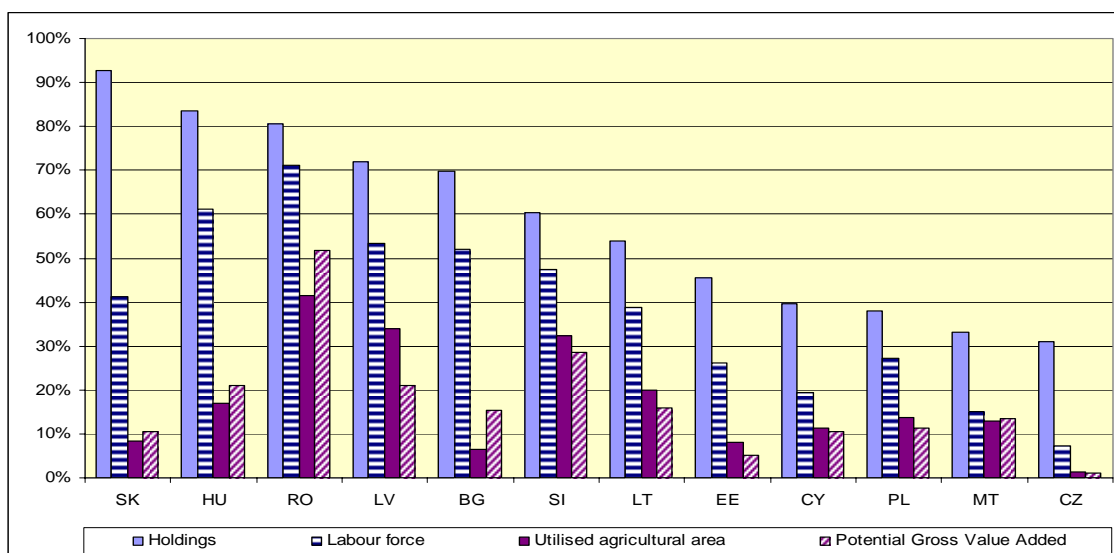


Source: Eurostat, Farm Structure Survey, 2007

²⁷ The economic size of farms is expressed in terms of European Size Units (ESU). The value of one ESU is defined as a fixed number of EUR of Standard Gross Margin. Currently, 1 ESU corresponds to 1200 € farm standard gross margin.

Semi-subsistence farms (where the farm household consumes more than half of the farm production) still exist all over the EU (45% of the EU-27 holdings) but represent a critical challenge in several EU-12 Member States: in nearly half of them they represent at least 70% of the holdings, half of the total agricultural labour force and 20% of the UAA and of the potential GVA.

Graph 10 Importance of semi-subsistence farms (with households consuming more than half of their production) in the EU-12 - 2007

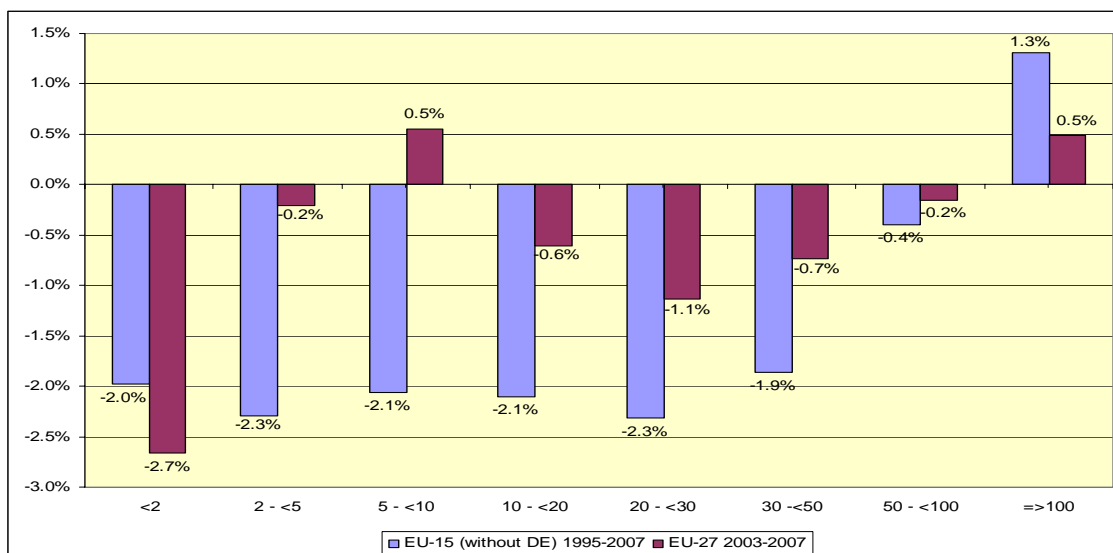


Source: Eurostat, Farm Structure Survey, 2007

2.2.4. Distribution of production factors

The distribution of land and labour input across farms reflects the size structure: in 2007 around 77% of the agricultural area was concentrated in 11% of farms with a size of 20 ha or more. Furthermore, the structural adjustment of the area and the labour force occurs at a very slow pace as the area farmed by the largest farms (with 100 ha or more) increased only by 1.3% per year in the EU-15 between 1995 and 2007.

Graph 11 Annual rate of variation of the UAA by category of area farm size in the EU – 1995-2007

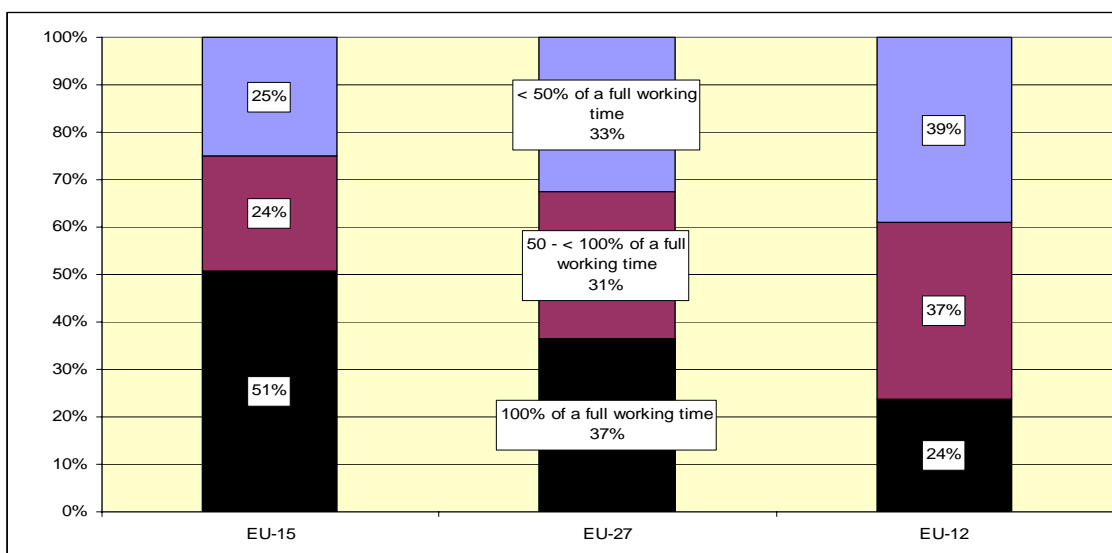


Source: Eurostat, Farm Structure Survey, 1995-2007

2.2.5. Labour force

With more than 80% of the labour force coming from the farm holders' family, EU agriculture is still largely based on family farms. Workers employed regularly make up 12% of the labour force. However, a very large share of the workers is not occupied full-time in agriculture: around 33% of the family and regular workers in the EU-27 are working less than half time in agriculture and only 37% of them have full time jobs.

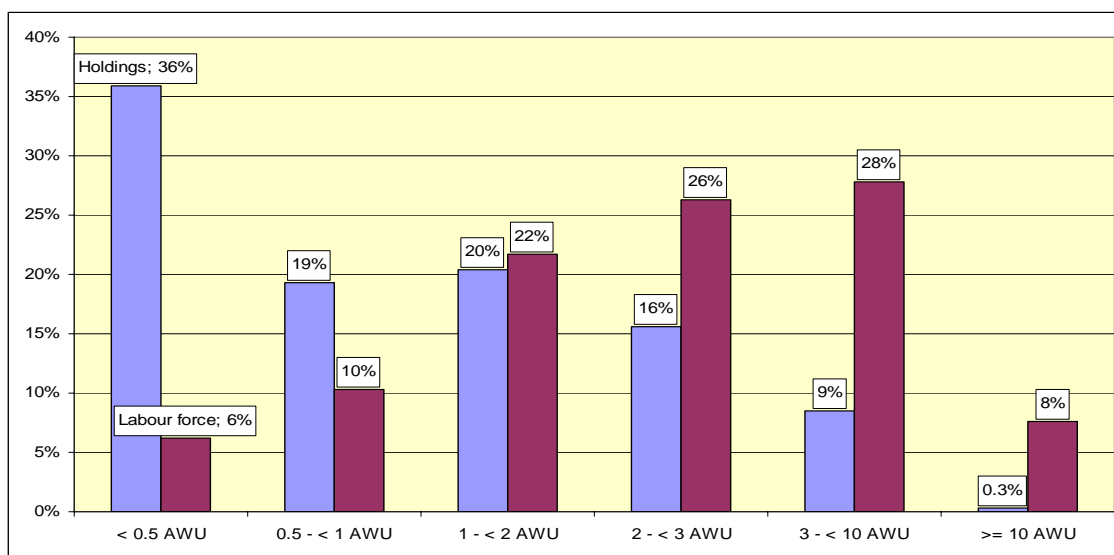
Graph 12 Distribution of family and non-family labour force working regularly in agriculture according to the working time in agriculture in the EU - 2007



Source: Eurostat, Farm Structure Survey, 2007

The importance of part-time farming is also reflected in the labour force used per holding: 55% of EU farms require less than one annual work unit.

Graph 13 Distribution of holdings and of labour force by class of labour force per holding in the EU – 2007

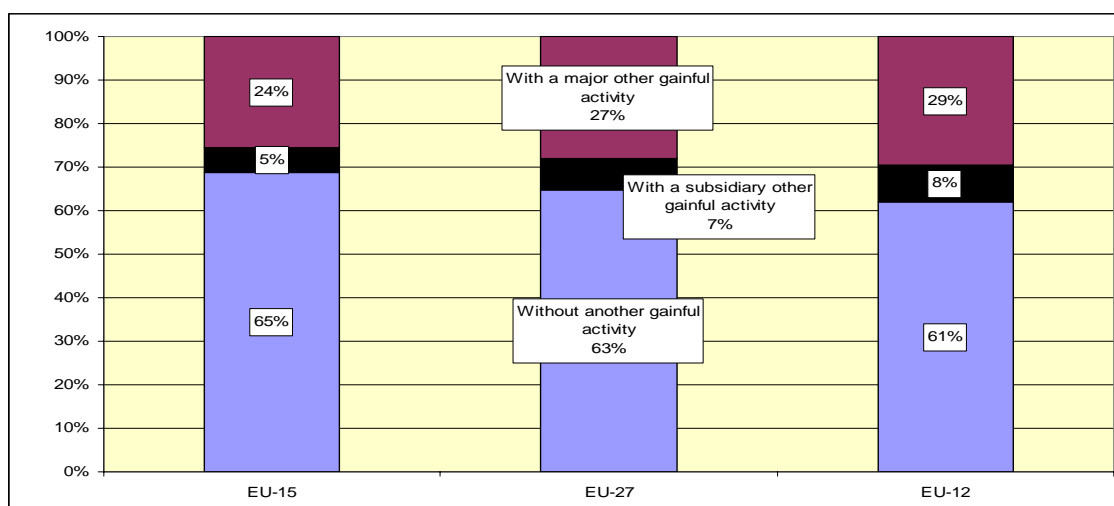


Source: Eurostat, Farm Structure Survey, 2007

On the other hand, due to the increase in labour productivity, the average labour force requirement per farm remains rather stable at around 1 AWU despite the increase of the average farm size, and more labour intensive activities such as horticulture and dairying which exhibited increasing employment per farm in the last years.

In 2007, only 15% of the managers of family farms of the EU-27 had a working time in agriculture equivalent to a full-time job - this proportion being higher when looking at the EU-15 (25%) and lower when looking at the EU-12 (9%) - although 63 % of family farm managers continue to have no other gainful activity than agriculture.

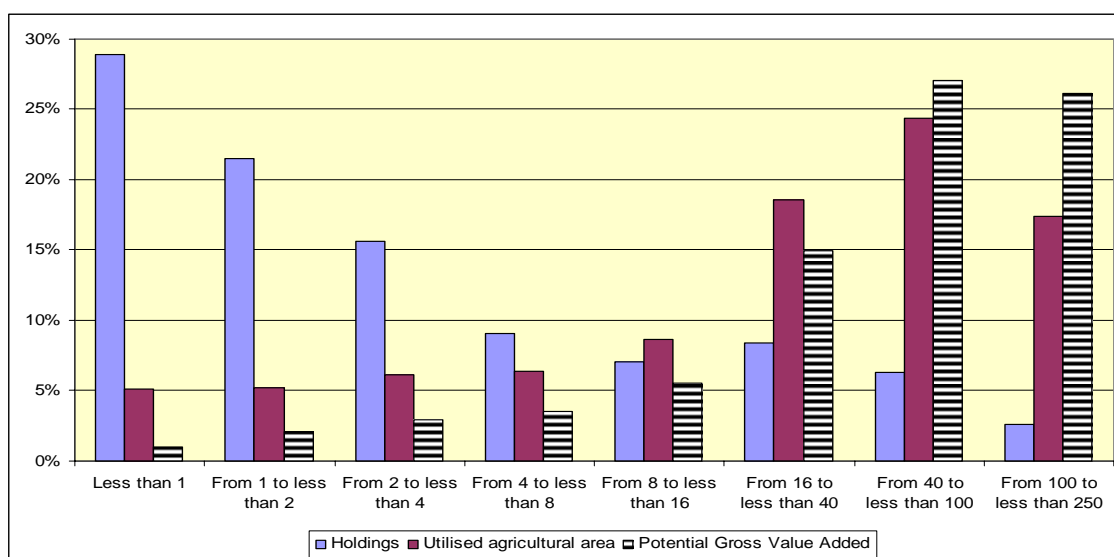
Graph 14 Distribution of managers of family farms according to the existence of gainful activities other than agriculture in the EU - 2007



Source: Eurostat, Farm Structure Survey, 2007

The proportion of managers of family farms having another gainful activity has increased only slightly over time. This may be the result of the increasing size of farms, as the scope for other gainful activities becomes limited when the size of the farm increases.

Graph 15 Distribution of holdings with another gainful activity than agriculture by economic farm size (ESU) in the EU-27 – 2007



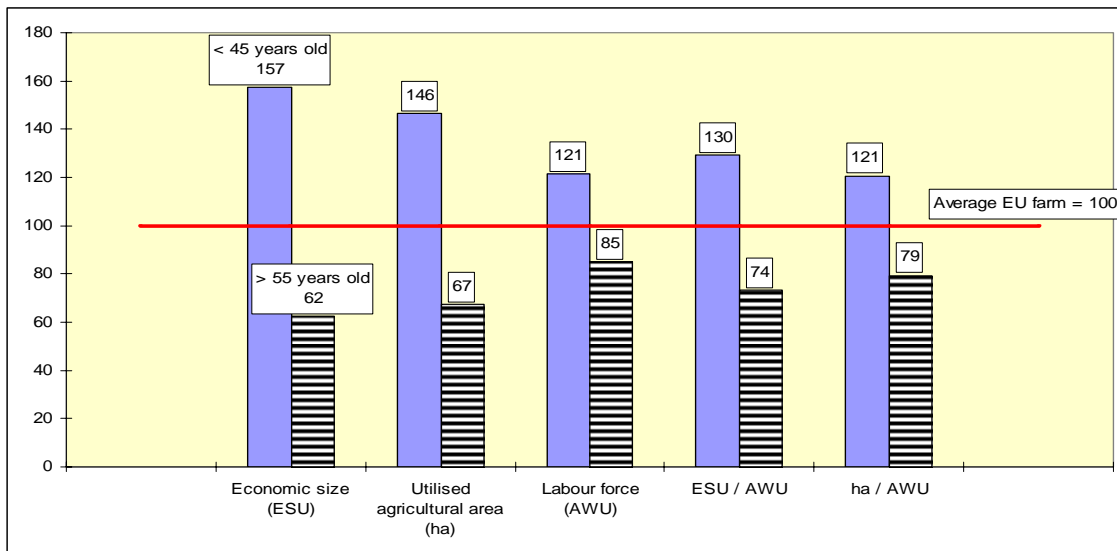
Source: Eurostat, Farm Structure Survey, 2007

Most of the production of family farms is therefore produced by managers with no other gainful activity than agriculture. Those family farm managers who do have another gainful activity tend to farm smaller farms with lower economic potential.

The presence of other gainful activities on family farms is more frequent when looking not only at the farmer but also at his/her spouse (52% of whom had other gainful activities in 2007 in the EU-27) and has grown from 32% to 49% between 1995 and 2007 in the EU-15. This increase reflects the diversification of income sources on European farms and probably also the overall trend observed in the rest of society towards a greater participation of women in the labour market.

The agricultural labour force is relatively aged, with more than 55% of all managers older than 55 years. This is particularly pronounced in Bulgaria and Romania but also in the old Member States where the number of "young" managers has diminished over time. However, younger managers tend to perform better than the EU average, with 46% more area and 57% more economic potential for 21% more labour force.

Graph 16 Performance of managers of less than 45 years old and of managers of more than 55 years old in the EU-27 - 2007



Source: Eurostat, Farm Structure Survey, 2007

Women represent 42% of all agricultural workers, their percentage being higher in the EU-12 (47%) compared to the EU-15 (38%). The share of female farm holders increased from 26.8% to 28.7% of total farm holders in the EU-27 between 2003 and 2007 (also this percentage is higher in the EU-12 compared to the EU-15).

Graph 17 Evolution of female farm holders (as % of total farm holders) in the EU - 2003-2007

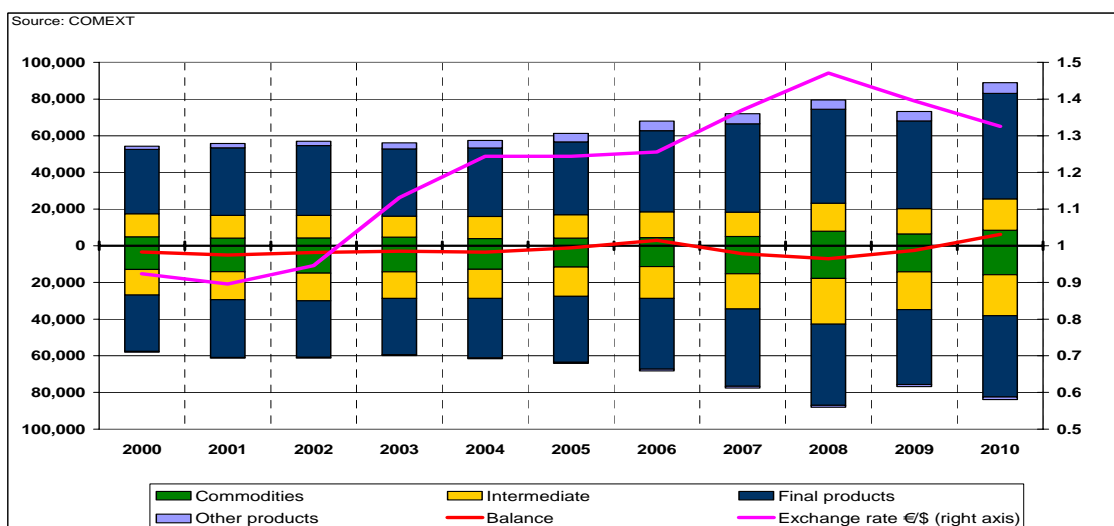


Source: Eurostat, Farm Structure Survey, 2003-2007

2.3. Agriculture and food trade

The EU holds a significant weight in international agriculture and food trade²⁸. With average annual imports of €3 billion in 2008-2010, the EU is by far the largest importer, although its share in world imports has decreased from 21% in 2007 to 19% in 2009. Exports have reached an annual average of about €2 billion in 2008-2010, placing the EU at a par with the USA with a share of around 18% of world exports.

Graph 18 Structure of EU agriculture and food trade



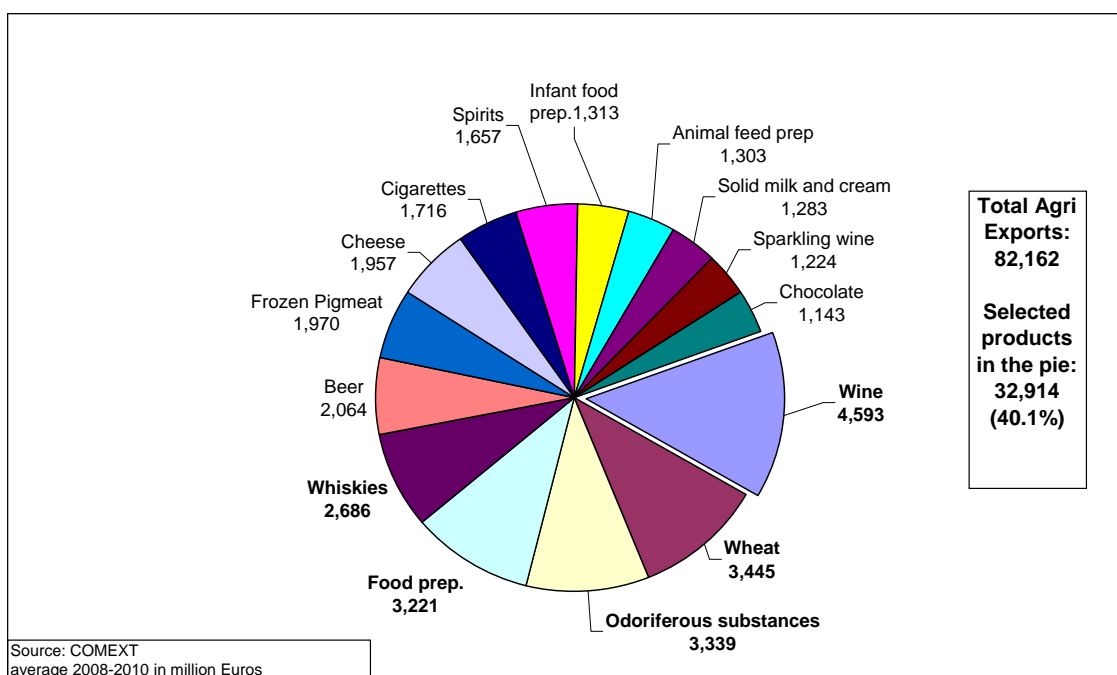
²⁸ Agriculture and food trade covers chapters 1-24 except 03 (fish and fish products) of the combined nomenclature. It is also included in a number of headings in chapters 33, 35, 38, 41, 43 and 51-53.

EU agri-food trade has experienced a sustained growth in the last ten years, with average annual growth rates at 3.7% for imports and 5.1% for exports. Growth was particularly dynamic in the period 2005-2008.

In 2009 trade was profoundly affected by the economic crisis. EU imports contracted faster than exports so that the EU trade deficit decreased substantially from a record €7 billion in 2008 to just €2.5 billion in 2009.

The EU's trade balance continued to improve in 2010 to the extent that it switched from being a net importer with a trade deficit of €2.5 billion in 2009 to a net exporter, for the first time since 2006, with an agricultural trade surplus of over €6 billion. The surplus is largely due to growth in the value of exports after the contraction of trade in 2009 linked to economic crisis and the drop in commodity prices.

Graph 19 EU-27 main agriculture and food exports, average 2008-2010 (€billion)



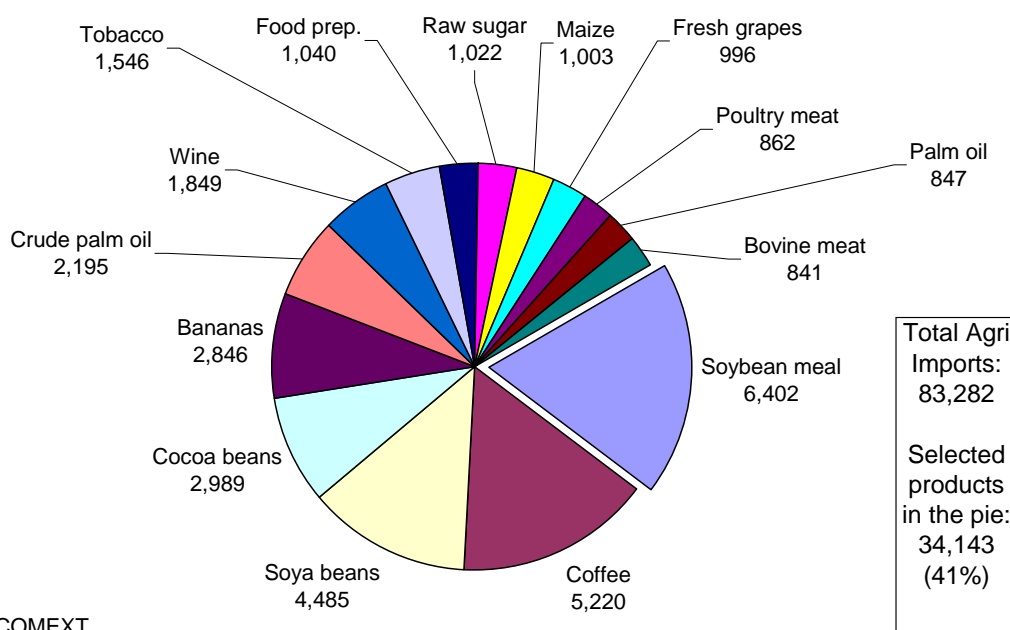
Final products dominate EU agri-food trade. They accounted for 63% of the value of exports in 2008-2010 and 52% of the value of imports in the same period. While the EU overall agri-food trade balance has been constantly negative in the last decade, with the notable exception of 2006 and 2010, in the case of final products it was constantly positive and the surplus reached the average of €9.1 billion in 2008-2010. Intermediary products and commodities represented respectively 20% and 9% of the total value of EU exports. For imports these categories hold higher shares with 27% and 19% respectively.

Graph 19 shows that most of top 15 exports were final goods in 2008-2010. Wine (€4.6 billion) is still the EU's highest value export for 2008-2010, followed by wheat (€3.4 billion), odoriferous substances (€3.3 billion), food preparations (€3.2 billion) and whiskies (€2.7 billion). Combined they account for one fifth of EU exports.

The top 15 import products for 2007-2009 are shown in Graph 20. Soybean meal (€6.4 billion) is the EU's top import, followed by coffee (€5.2 billion). Imports of soya beans are worth €4.5 billion and ranked third, followed by cocoa beans (€3 billion) and bananas

(€2.8 billion). Together, these top five products account for one-fourth of the overall value of EU imports in 2008-2010, the most important ones being shown in graph 20.

Graph 20 EU-27 main agriculture and food imports, average 2008-2010 (€billion)



Source: COMEXT
average 2008-2010 in million Euros

The USA remains a key partner, both on the import and export sides. Despite decreases since 2006, the USA still absorbed 15% of EU exports in 2010. Notwithstanding a steep fall of 21% in 2009, Russia is still the second most important market for the EU with a share of over 10% in 2010. On the import side, Brazil is the most important trade partner with a share of 14% of EU imports in 2010. The EU remains the biggest importer of agricultural products from developing countries, importing €9 billion worth of goods in 2008-2010. This is far ahead of the US, Japan, Canada, Australia and New Zealand put together.

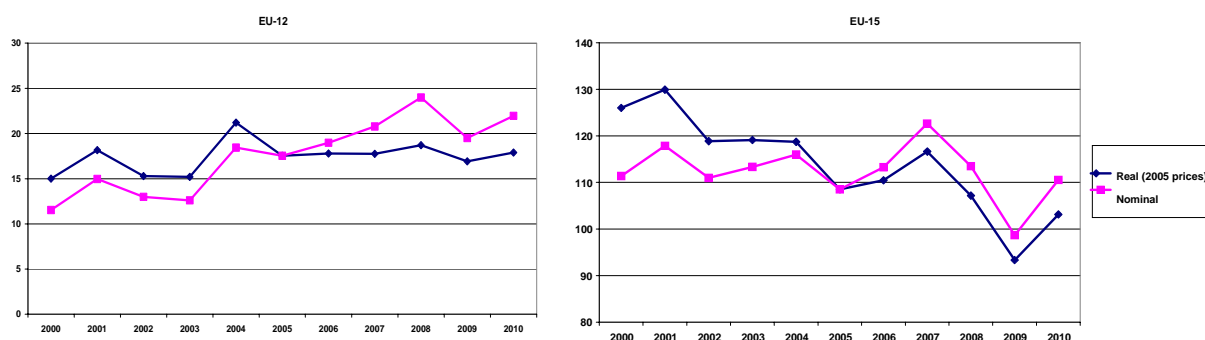
2.4. Income development

The increase in agricultural income recorded in 2010 in the EU-15 does not reverse the long term declining trend in real sector income, which fell by 18% since 2000.

By contrast nominal income has grown significantly in the EU-12 mainly due to the higher market prices prevailing in the single market and the phasing-in of direct payments. Real income however has grown more moderately and is rather stable since accession.

Farm income varies greatly across Member States and sectors. Sectors such as pigs and poultry, milk and horticulture exhibit on average income levels above other sectors such as grazing livestock or field crops.

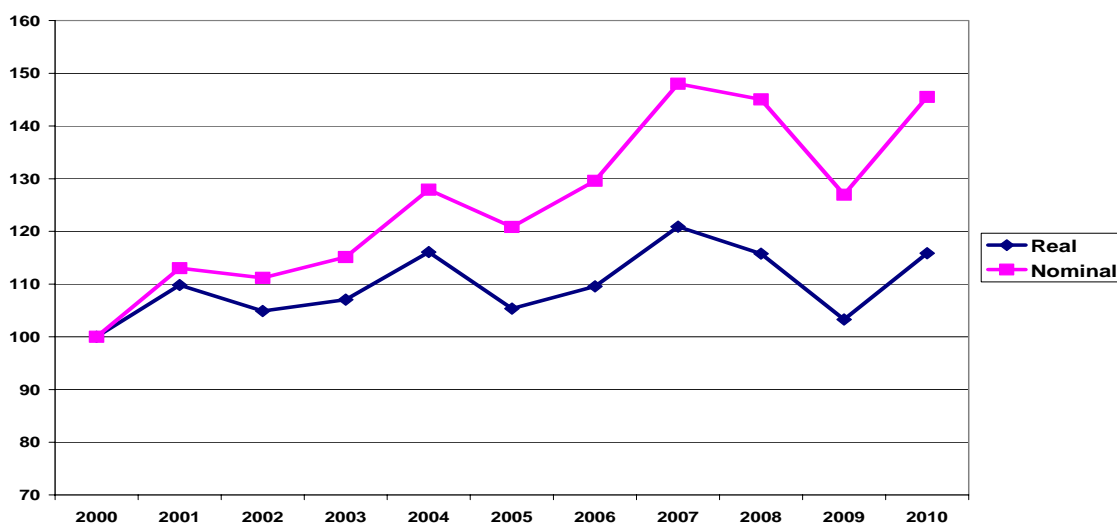
Graph 21 Development of agricultural factor income in the EU-12 and the EU-15, 2000-2010 (billion €)



Source: Eurostat — Economic Accounts for Agriculture — Elaboration DG AGRI

Over the last decade, agricultural income per annual work unit in the EU-27 increased in both nominal and real terms (Graph 21). On average, however, the increase in real terms has been quite modest (1.5% per year) and the development of real income remains volatile. After an increase of 15% between 2000 and 2004, agricultural income dropped by 10% in 2005 as a consequence of a strong contraction in the larger EU-15 Member States. Over 2006 and 2007, income increased by a total of 15%, due to soaring commodity prices, before dropping sharply after 2008 with the end of the price bubble and the beginning of the economic recession. This brought down real income in the EU-27 close to the level of the year 2000. Early estimates indicate a 12.2% increase in real agricultural income per annual work unit for 2010 (still slightly below 2008 levels), as output prices recovered after the very low levels of the previous year.

Graph 22 Development of agricultural factor income per annual work unit (AWU) in the EU-27 (2000=100)

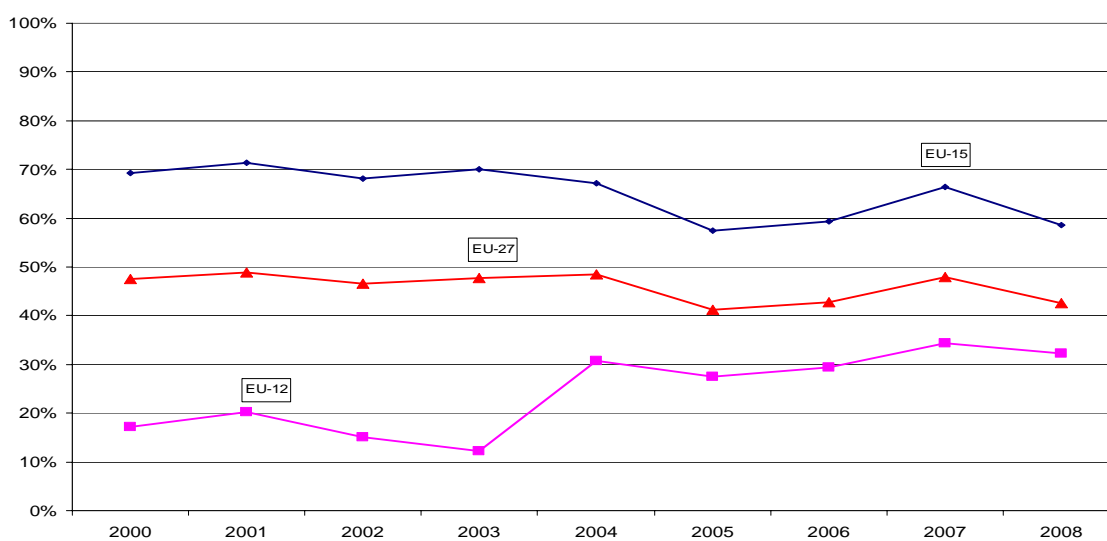


Source: Eurostat — Economic Accounts for Agriculture — Elaboration DG AGRI

As shown in Graph 22, the development of the total agricultural income has not been the same in the EU-12 and the EU-15. Nominal income in the EU-15 oscillated around a stable path until 2006. But its strong increase in 2007 was followed by two successive declines, including a 10.2% drop in 2009 which caused income to plummet to levels last seen in the beginning of the 90s.

Given that the value added generated by the agricultural sector has been decreasing steadily in the EU, the evolution of the agricultural income per annual working unit (AWU) depends heavily on the increase of labour productivity made possible by the sharp decline in the number of farmers. The strong gains in factor productivity of the farm sector that allowed an important expansion of the volume of production outpaced the slow development of an inelastic demand for agricultural and food products, generating a regular and steep decline in real prices until the price increase of 2007/2008. The gradual shift from market price support to direct income support started in 1993 allowed to support and stabilise the agricultural income due to higher income transfer efficiency. Direct payments accounted for 27% of agricultural income in the period 2006-2008 at the EU-27 level, total subsidies amounted to close to 40% of agricultural income.

Graph 23 Entrepreneurial income in agriculture/self-employed AWU as % of wages in the total economy/AWU



Source: Eurostat– Economic Accounts for Agriculture – Elaboration DG AGRI

Yet the income per worker in the agricultural sector is significantly below the income in the rest of the economy. In 2008 the average agricultural income in the EU-27 was equal to 58% of the average wage in the total economy. In the EU-15 the income gap has widened over time. The ratio decreased from 70% in the year 2000 to 60% in 2008. In the EU-12 the gap is even more pronounced but has declined over time. The ratio increased from less than 20% in 2000 to more than 30% in 2008.

2.5. Situation of rural areas

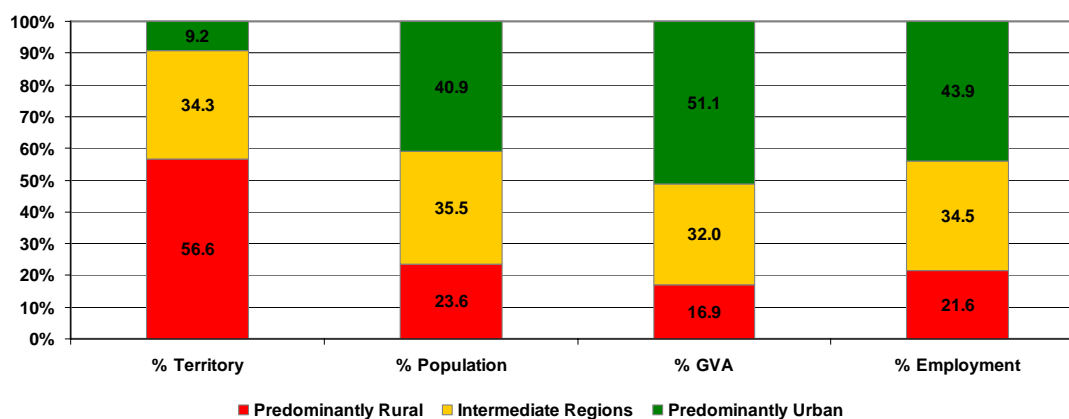
2.5.1. Importance of rural areas

Rural areas (i.e. predominantly rural and intermediate regions following the new definition of rural areas; see Annex A.3) represented 91% of the territory and 59% of the population of the EU-27 in 2008. The corresponding shares for predominantly rural areas alone were 57% of the territory and 24% of the population, making them particularly important in terms of land use.²⁹

²⁹ Source: "Rural Development in the European Union – Statistical and Economic Information – Report 2010"

Though economic activity tends to concentrate in urban areas, rural areas generated 49% of the total GVA and provided 56% of the overall employment in 2008, these shares being higher in the EU-12.³⁰ However, compared to predominantly urban areas, rural areas tend to lag behind for a number of socio-economic indicators: income per capita, employment rate, human capital, activity of women and young people, development of the tertiary sector as well as other aspects linked to the quality of life.

Graph 24 Importance of rural areas (% territory, population, GVA and employment). 2008 (*)



Source: Eurostat, Regional Accounts

(*) New definition of rural areas (see Annex A.3)

2.5.2. Population density and age structure

Most rural areas are characterised by low population densities: at EU-27 level, population density varies from 48 inhabitants per km² in predominantly rural areas to 516 inhabitants per km² in predominantly urban areas. This range is even larger when comparing regions: it ranges from 2 inhabitants per km² in French "Guyane" and Finnish "Lappi" to 21024 inhabitants per km² in Paris. In most Member States, population density in rural areas did not evolve significantly between 2000 and 2008, whereas it was quite dynamic in the urban areas of some Member States.³¹

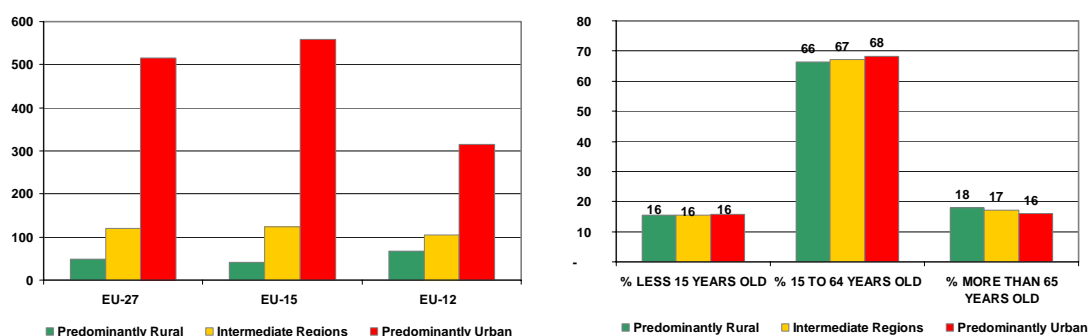
The age structure of the population does not vary significantly between different types of areas, even if the proportion of working age people (from 15 to 64 years old) is slightly higher in urban areas and the proportion of old people (65 years old and more) is slightly higher in predominantly rural areas at EU-27 level. It seems that age structure is more influenced by demographical differences among Member States. For instance, in rural areas of the EU-15 there is generally a larger proportion of old people, whereas there are relatively more working age people in the new Member States. Between 2004 and 2008, the share of young people (less than 15 years old) decreased in almost all Member States and for all types of areas.³²

³⁰ Employment of Predominantly Rural and Intermediate regions at NUTS-3 level save AT. Source: Regional Accounts 2007.

³¹ These changes are of course strongly influenced by the delimitation of NUTS-3 that may be restricted to urban centres.

³² Only 17 countries were available for calculating the change 2004-2008.

Graph 25 Population Density (inhabitants per km²) and Age Structure by type of region. 2008 (*)

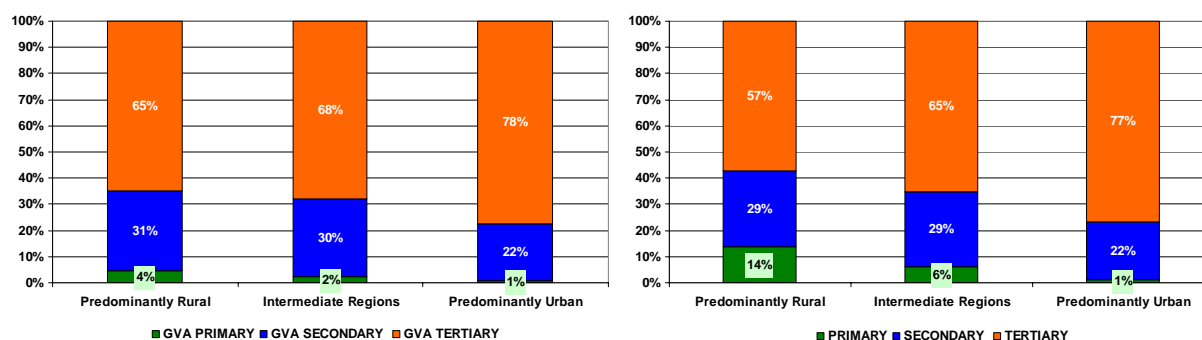


Source: Eurostat, Regional Accounts
 (*) New definition of rural areas (see Annex A.3)

2.5.3. Socio-economic aspects

Although many rural areas are now driven by urban economies as in-migration has occurred around metropolitan centres, the primary sector still represents 9% of the employment and 3% of the value added in the rural areas of the EU-27. This situation is even more marked in the EU-12, with the corresponding shares standing at 19% and 6% respectively, and especially in the EU-12: for 27% of them the contribution of the primary sector to total GVA is higher than 10%, and for almost 40% of them the share in employment of the primary sector is higher than 20%.³³

Nevertheless, most of the economic activity in rural areas depends on the service sector. This trend is likely to increase in the coming years as, between 2002 and 2008, the relative importance of the primary sector in the economy of the rural areas in the EU-27 decreased by 1.9 percentage points in terms of employment and by 0.8 percentage points in terms of value added.



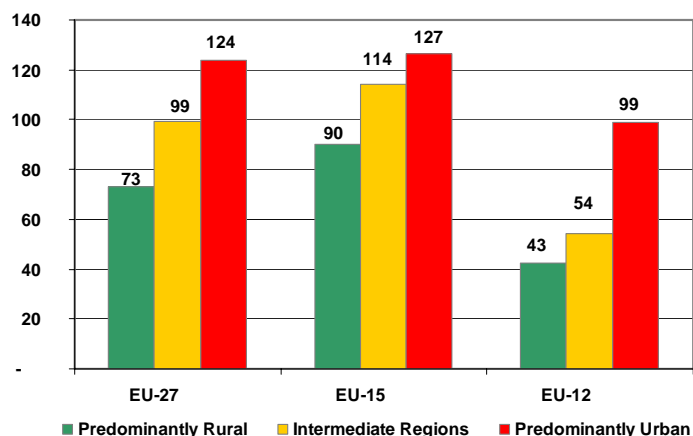
Graph 26 GVA and Employment by branch. 2008 (*)

Source: Eurostat, Regional Accounts
 (*) New definition of rural areas (see Annex A.3)

³³ Primary sector refers to branches A_B of the NACE classification (agriculture, forestry, hunting and fisheries)

This is a consequence of the diversification of the economy of rural areas to sectors other than agriculture. The average annual increases of both employment and added value in the non-agricultural sector for all the rural regions stood at around 1.3% (2002-2008) and 2.6% (2004-2008) per year respectively. As a result, in 2008, 86% of employment and 96% of value added in predominantly rural areas of the EU-27 came from the non-agricultural sectors. Among these, tourism is one of the key opportunities in terms of potential growth for rural areas. With nearly three quarters of bed places in the EU-27 located in rural areas, this sector already plays a major role in the rural economy.

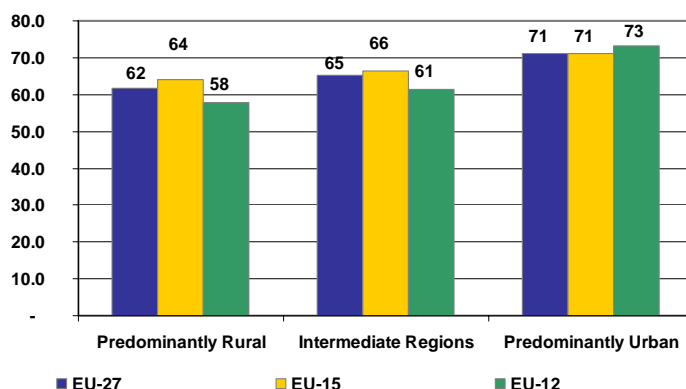
Graph 27 GDP in parity purchasing standard (PPS) per capita by type of region 2008. EU-27 average: 100. (*)



Source: Eurostat, Regional Accounts
 (*) New definition of rural areas (see Annex A.3)

GDP per capita is higher in urban than in rural areas. At EU-27 level, the income per inhabitant in rural areas represents 83% of the EU average, ranging from 97% in the EU-15 to 48% in the EU-12. The gap between predominantly rural and predominantly urban areas is accentuated in the new Member States. However, while the relative income per inhabitant in rural areas of the EU remained globally unchanged between 2001 and 2008, it has improved in rural areas of the new Member States (predominantly rural areas of the EU-12 moved from 35% to 43% of the EU average, while intermediate regions moved from 43% to 54%). Even though rural regions in the EU-12 are growing faster than the EU-27 average, they are growing more slowly than urban areas of the EU-12; consequently, the rural-urban gap in the EU-12 has increased over the last years.

Graph 28 Employment rate (%) by type of region 2008. (*)

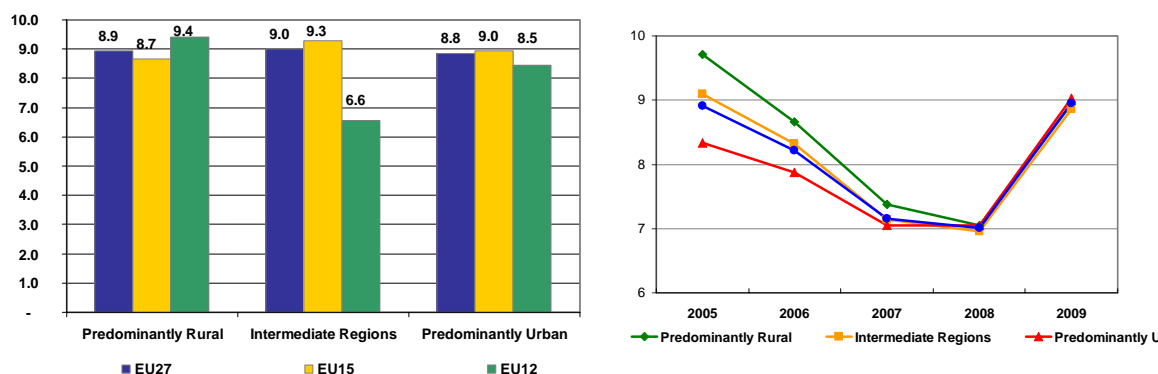


Source: Eurostat, Regional Accounts and Labour Force Survey.
 Excluding Ireland.
 (*) New definition of rural areas (see Annex A.3)

The employment rate in the EU-27, calculated as a share of the population of 15 to 64 years old, is lower in predominantly rural than in other areas (63% in predominantly rural areas against 67% for all areas in 2008). However, while the employment rate in the EU-15 has generally increased at the same pace in rural and urban areas since 2003, it has increased more slowly or even decreased in the rural areas of the EU-12.

The unemployment rate, calculated as a percentage of the active population, is close to 9% for the three types of regions across the EU-27, ranging from 6% in Denmark to 18% in Spain and Latvia. In the EU-12, unemployment is highest in predominantly rural regions, whereas in the EU-15 the differences between different types of regions are very small. What it is common for all types of regions is that after the general decrease over the period 2005-2008, the unemployment rate has now considerably increased again.

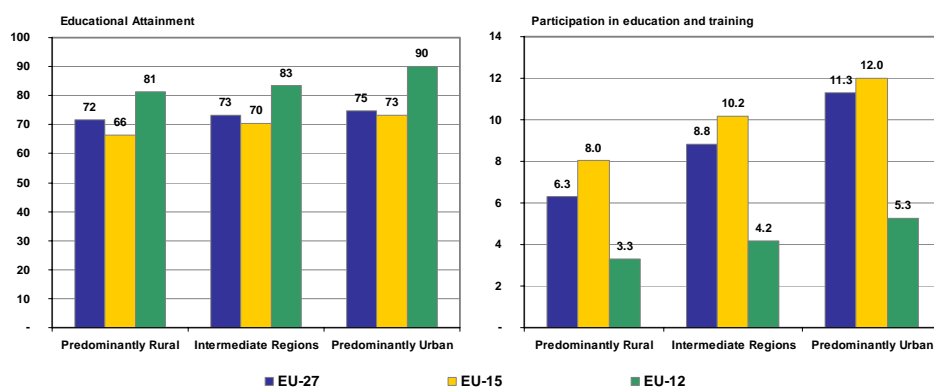
Graph 29 Unemployment rate (%) by type of region (2009) and evolution (2005-2009) (*)



Source: Eurostat, Regional Accounts and Labour Force Survey
 (*) New definition of rural areas (see Annex A.3)

Human potential is a key factor for the development of rural areas. In 2009, 74% of adults in the EU-27 reached a medium or high education level.

Graph 30 Educational Attainment: % of adults (25-64) with medium and high educational attainment and % of adults (25-64) participating in education and training by type of region. 2009(*)



Source: Eurostat, Regional Accounts and Labour Force Survey
 (*) New definition of rural areas (see Annex A.3)

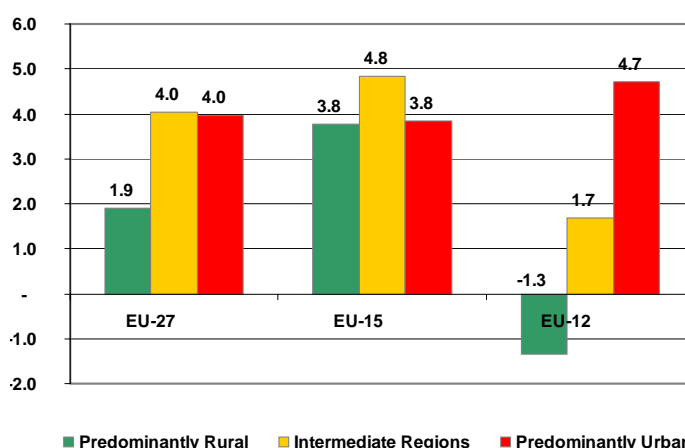
There are however large variations among Member States (from 28% to 91%), with notably a higher level of education in the new Member States than in the EU-15. In most countries the level of education is lower in rural areas than in urban areas.

Life-long learning is a good instrument to improve the skills of workers and favours economic development. It is already largely applied in Denmark and Finland where more than 20% of adults participated in training in 2009. However, it is less used and progressing more slowly in rural areas, particularly in the EU-12.

2.5.4. Quality of life

Rural areas also tend to lag behind in other quality of life indicators. The net migration rate is a good measure of the global attractiveness of an area. It is lower in predominantly rural areas than in predominantly urban areas (+2‰ and +4.0‰ respectively for the EU-27 in 2007) and even negative for the predominantly rural areas of the EU-12.³⁴ This pattern varies among Member States and other factors, such as more favourable climatic conditions, can play a major role in the decision of people to move to another place.

Graph 31 Net Migration by type of region in ‰. 2007 (*)



Source: Eurostat, Regional Accounts and Labour Force Survey
 (*) New definition of rural areas (see Annex A.3)

Even if rural areas may be attractive as a place to live, remoteness remains a major problem and numerous aspects of quality of life need to be improved in many rural areas. The development of services is generally lower in rural areas: at EU-27 level, services represent 64% of the economic activity in predominantly rural areas in comparison with 77% in predominantly urban areas. Broadband internet infrastructure and take-up by the population are also significantly lower in rural than in urban areas: at the end of 2009, the percentage of the population having subscribed to DSL internet in predominantly rural areas of the EU-27 was lower than in urban areas, whereas internet take-up rates were

³⁴ Excluding the United-Kingdom.

13.4% and 20.8% respectively in predominantly rural and predominantly urban regions of the EU-27.³⁵

3. MEDIUM-TERM PERSPECTIVES FOR EU AGRICULTURE AND RURAL AREAS

Future economic viability of EU agriculture depends heavily on future developments in EU and world markets. This section provides an overview of the most recent medium-term prospects for agricultural markets and their impact on agricultural income.³⁶

The outlook for EU agricultural markets remains subject to a number of uncertainties regarding future market developments as well as the macroeconomic and policy settings. They concern in particular the drivers of demand and supply of agricultural commodities, the linkage between agriculture and energy markets and the path of economic recovery. Climate change will continue to influence the market outlook, with unpredictable weather patterns increasing the likelihood of supply fluctuations. Other factors such as future changes in agricultural and trade policies as well as the outcome of the current Doha Development Round of trade negotiations, bilateral/regional trade discussions and the policies on renewable energy could also have far reaching implications for the future pattern of EU agricultural markets.

The medium-term outlook for EU agriculture depicts a mixed picture with regard to commodity market developments. While the expected demand growth resulting from economic recovery and the biofuel mandates should support production expansion, EU output is likely to remain below its full potential as long as the expected increase in input costs limits the profitability of production. In addition, crop yields are expected to grow at a slow pace, continuing the decline in the rate of growth observed during the previous decade.

An appreciation of the EUR could further weaken the competitiveness of EU exports on world markets, leading to a loss in world market share at a time when global demand is growing at a relatively fast pace.

On the other hand, commodity markets are expected to remain balanced during the outlook period, without the need for market intervention, (only the SMP market will remain sensitive to global supply-demand developments in the short term). Prospects for agricultural income remain positive, displaying a modest growth rate at the EU level, mainly driven by the decline in labour input which is expected to continue.

The outlook for EU agricultural markets and income over the period 2010-2020 assumes an unchanged policy environment, stable macroeconomic conditions and relatively favourable world market perspectives. The Common Agricultural Policy is assumed to follow the Health-Check decisions, and global trade policy is expected to respect the Uruguay Round Agreement on Agriculture. Macroeconomic assumptions include a gradual and modest EU GDP growth at around 2% p.a. and a steady appreciation of the EUR to around 1.47 USD/EUR. Commodity prices are expected to stay firm over the

³⁵ For broadband indicators, the definition of rural areas is different from the new typology of rural areas (See Annex A3): rural areas are defined as those areas with less than 100 inhab./km², suburban: 100 to 500 inhab./km², and urban: more than 500 inhab./km².

³⁶ Based on the 'prospects for agricultural markets and income in the EU, 2010-2020', 2010, DG AGRI, http://ec.europa.eu/agriculture/publi/caprep/prospects2010/index_en.htm

medium term, supported by numerous factors such as the growth in global food demand, the development of the biofuel sector and the long-term decline in food crop productivity growth.

3.1. EU agricultural markets

3.1.1. Arable crops

The medium-term prospects for the EU cereal markets depict a relatively positive picture with tight market conditions, low stock levels and prices remaining above long term averages. Supply growth is expected to result mostly from very moderate yield growth (just above 0.5% per year on average) with some reallocation between crops in a stable cereal area. The domestic use of cereals in the EU is expected to increase, most notably due to the growth in the emerging bioethanol and biomass industry in the wake of the initiatives taken by Member States in the framework of the 2008 Renewable Energy Directive (RED).

The medium-term prospects for the EU oilseed markets depict a positive picture with strong demand and high oilseed oil prices. Supply growth is expected to result mostly from moderate yield growth and to a lesser extent from a slightly expanding oilseed area, with some reallocation between crops. The expected increase in domestic use of oilseeds in the EU would also be driven by the growth in the emerging biodiesel and biomass industry following the initiatives taken by Member States in the framework of the RED. The trade balance is not expected to improve over the medium term as additional imports are required to meet the biofuel targets.

3.1.2. Meat

Total meat production is expected to recover in the near term from the decline suffered in the wake of the economic crisis, but longer term growth prospects remain modest at an annual rate of 0.3% on average.

Aggregate meat production is expected to reach 44.4 mio t in 2020, exceeding the 2009 level by 4%. The situation differs between ruminants and non-ruminants, as beef/veal and sheep/goat meat production would drop by 7% and 11%, respectively, while pig and poultry meat production would expand by 7% each. The potential growth in non-ruminant meat production would remain constrained by the expected increase in production costs.

A driving factor for production growth is the increasing poultry and pig meat consumption. On a per capita basis, overall EU meat consumption is likely to reach 85.4 kg in 2020, 2% more than in 2009. The increase will be highest for poultry meat consumption (above 6%), while growth in the consumption of pig meat is expected to remain below 5% on average between 2009 and 2020. Pig meat would remain the most preferred meat in the EU at 43.3 kg/capita in 2020, compared to 24.7 kg for poultry, 15.4 kg for beef and veal and less than 2 kg for sheep and goat meat.

The net trade position of the EU is projected to deteriorate during the outlook period, driven by a steady increase in meat imports (mainly beef and poultry) and a parallel decline in meat exports (beef, pig and poultry). Aggregate meat imports are expected to grow by 14%, while meat exports would decline by almost 23% by 2020, leaving the EU with net exports of around 200 thousand t, with pig meat as the single commodity with a positive net trade balance.

3.1.3. Milk and dairy products

Milk production is expected to return to an increasing path, driven by a fairly optimistic demand outlook based on improved macroeconomic prospects. The rate of increase will be rather moderate, with EU-27 milk production in 2020 projected to exceed the 2009 level by less than 4%. Milk deliveries would increase at a slightly higher rate (of almost 5%), the difference being due to the gradually declining on-farm consumption in the EU-12. The abolition of quotas is expected to lead to a very modest reaction of EU-27 milk deliveries at the end of the quota regime in 2015.

The outlook appears favourable for higher value added dairy commodities, driven by growing demand for cheese and fresh dairy products. Production of fresh dairy products (including drinking milk, cream, yoghurts, etc.) is projected to increase by about 8% (from 2009 to 2020) and cheese output is depicted to grow by about 10%. Prospects for cheese exports are favourable despite the strengthening EUR, with the EU maintaining a steady share of more than 30% in global cheese exports.

Whole milk powder production is expected to fall only marginally below its 2009 level and EU exports are projected to remain firm over the medium term, driven by strong global demand. Nevertheless, the EU is expected to lose market share of global exports, declining to 21% in 2020 (from 24% in 2009).

The outlook depicts continued market stability for butter, conditional on firm domestic demand around the level of 2 million t. The projected increase in production for 2015 (year of quota abolition) would lead to a temporary increase in EU exports.

Skimmed milk powder (SMP) export perspectives are less favourable, given the assumed strengthening of the EUR and strong supply from other exporters. As EU demand prospects are also fairly weak, the outlook for price growth is rather constrained over most of the projection period. However, supply pressure on the market would be mitigated by reduced EU production.

All in all, and despite the relatively favourable outlook and apparent short- and long term market stability for SMP, the nearer-term prospects remain sensitive to global supply-demand developments and the market's ability to absorb the release of intervention stocks.

3.2. Agricultural income

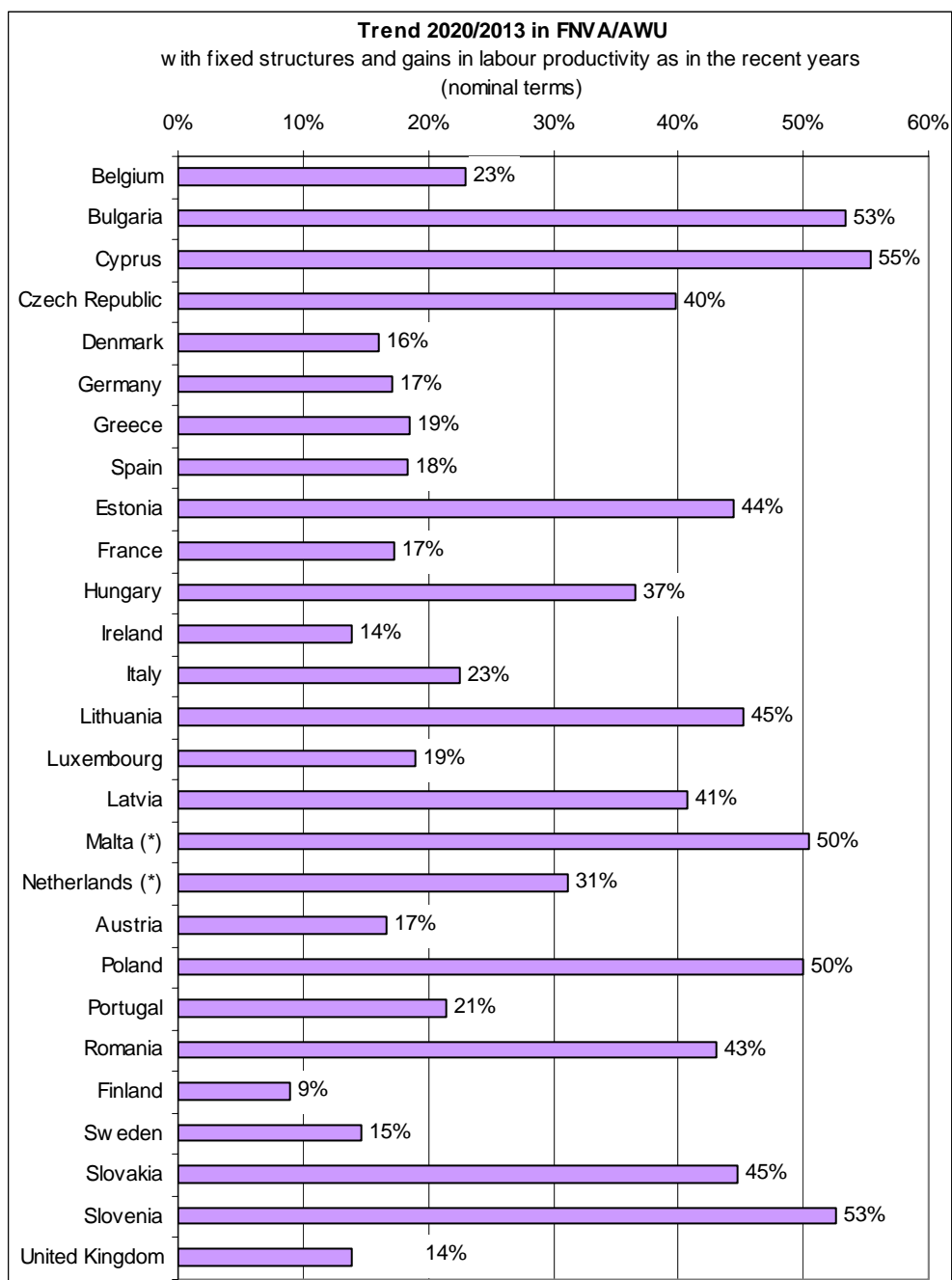
Agricultural income (expressed as real factor income per labour unit) is expected to recover from the significant low level in 2009 with an outlook for a gradual, albeit modest growth in aggregate EU income over most of the projection period that would exceed the 2005-2009 average (base) level by around 20% in 2020.

This overall gain masks uneven developments for the EU-15 and EU-12: whereas agricultural income in the EU-15 shows a moderate increase to almost 10% above the base level, the income growth is much more pronounced in the EU-12, rising 45% above the base level by 2020 and converging towards the EU average.

While the assumed decline in agricultural labour remains an important factor behind the income prospects for both the EU-15 and the EU-12, the increase in the subsidies granted to agricultural producers in the EU-12 over the phasing-in period should remain a key driver of income growth in this group of Member States.

At the level of individual Member States³⁷ income projections differ depending on various elements, namely composition of agricultural production, average cost structure and assumed gains in labour productivity.

Graph 32 Trends in income by Member State*



Source: EU FADN DG AGRI

* Income expressed in Farm net value added (FNVA) per Agricultural working unit (AWU).

Among the EU-12, Cyprus, Malta, Bulgaria, Poland and Slovenia are expected to register the highest income improvements, between +50% and +55% by 2020 in comparison with 2013. This is the result of a favourable price trend in their main agricultural products, e.g.

³⁷ Income projections based on farm data contained in the Farm Accountancy Data Network (FADN) allow going further in detail into trends by member state, size and type of farms.

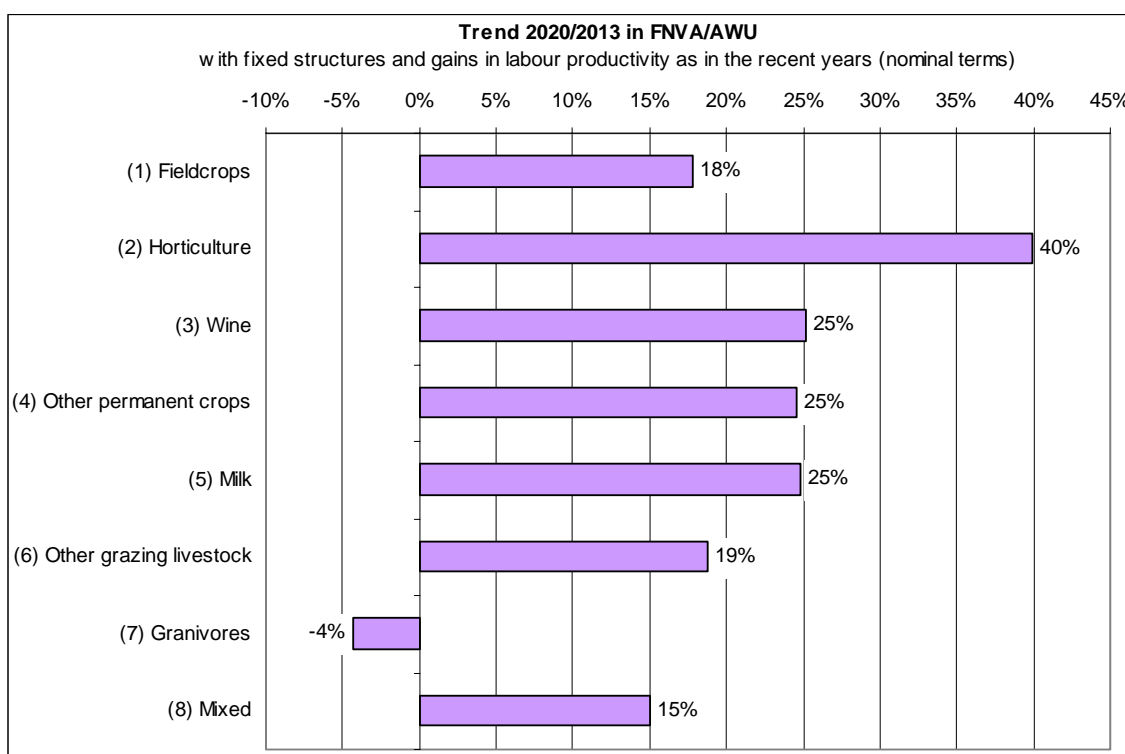
vegetables and flowers in Cyprus and Malta, lower costs and high gains in labour productivity.

Lower levels of improvements are expected in the EU-15 countries. The highest increase (+31%) would be in the Netherlands due to the high share of vegetables and flowers in output. The lowest income increases are observed for Finland, Sweden, Ireland and the United Kingdom, which can be explained by the higher share of products with unfavourable price trends, higher costs, and lower gains in labour productivity.

Farms specialised in horticulture are expected to register an outstanding performance, with an increase in income by 40% between 2013 and 2020 due to the assumed good evolution in prices for vegetables and flowers. Field crop farms³⁸ would also improve their economic performance but at a relatively lower rate (+18%) because of a limited increase in the production of cereals (+2%).

The income trend would also be positive for farms specialised in the production of wine, other permanent crops and milk, but to a lesser extent. They are likely to benefit from higher prices of their main outputs (i.e. quality wine, fruits, and milk products) as well as improved yields (i.e. dairy farms). On the other hand, pig and poultry farms would register a negative trend (-4%), because prices for pig meat and poultry meat are projected to stay stable and even decrease for eggs, whereas costs would increase.

Graph 33 Trend in income by type of farming



Source: EU FADN DG AGRI

³⁸ Specialised in the production of cereals, oilseeds, protein crops, rice, cotton, root crops and field vegetables.

* Income expressed in Farm net value added (FNVA) per Agricultural working unit (AWU).

The economic size of farms does not seem to influence income trends, although projections are slightly more positive for the smallest farms³⁹. This is because almost 90% of the smallest farms are located in the EU-12, where gains in labour productivity are higher. The smallest farms are located in Romania (54%), Poland (20%) and Bulgaria (7%), countries with the highest expected income improvements.

The majority of the biggest farms are located in France (27%), Germany (15%) and Italy (13%), countries where expected income improvements are not very high. However, most of the biggest farms are wine farms. That should explain the slightly higher income increase compared to the intermediate economic size classes (see graph 56 in Annex 4).

4. CONCLUSIONS

Over the last decades, EU agriculture and the agri-food sector as a whole has shown great resilience and adaptability to a rapidly changing technological, economic and social environment. Structural adjustment took place within a supportive policy setting which smoothed the pace of this long-term process. Whereas the agri-food sector still represents an important component of the EU economy, the potential of agriculture for the provision of public goods in the field of the environment is increasingly recognised. Farming has contributed over the centuries to creating and maintaining a variety of valuable semi-natural habitats and continues to shape the majority of the EU's landscapes today.

The present analysis displays a very large variety of farm structures in the EU-27. Two broad types of situations emerge: out of the 13.7 million farm holdings, 47% are of very small size and account for 23% of the labour force and 7% of the agricultural area. On the other side of the spectrum, 11% of the farms with a size of above 20 ha account for 77% of the agricultural area. This is a situation that is likely to persist in the medium term given the current trends of structural adjustment.

The agricultural sector continues to lag behind the rest of the economy in terms of income. The gap between agricultural and non-agricultural income has widened in the EU-15 in the last decade (from about 70% to 60% of average wages). In the EU-12, the gap has narrowed, mainly due to the introduction of the CAP, yet it still stands at about 30% of average wages. The year 2009 has been particularly unfavourable for agricultural income, bringing levels back to 2000 in the EU-27 (and 1994 for the EU-15) due to unfavourable input and output price levels and the economic crisis. The increase in agricultural income recorded in 2010 in the EU-15 does not reverse the long term declining trend in real sector income, which fell by 18% since 2000. The agricultural income in the EU-12 remains considerably lower than in the EU-15 but is increasing.

The EU holds a significant weight in international agriculture and food trade, with a share of around 18% of world exports and 20% of world imports, making it the world largest importer and exporter together with the US. Over the years, the EU managed to increase its export share of high value-added and processed products, which represent more than two thirds of total EU exports.

³⁹ The farm size is expressed in European Size Units (ESU), and is related to the amount of the Farm gross margin expressed in Euros.

The EU agricultural and food sector, which displays a wide diversity across Member States and sectors, has mainly developed in rural areas. Rural areas represent some 91% of the EU territory and 56% of the total EU population. These areas tend to lag behind the predominantly urban areas as regards a number of socio-economic indicators.

Although the development of rural areas is likely to become increasingly driven by factors outside agriculture, they face particular challenges as regards economic and social sustainability. This is particularly true for areas which are remote, depopulated or strongly dependent on farming. However, these areas have significant potential to meet the growing demand for food and for the provision of rural amenities. They serve as a reservoir of natural resources and highly valued landscapes, which make them attractive for tourism and as a place to live and work. The presence of a competitive and dynamic agri-food supply chain will remain a precondition to realising these potentials of rural areas in the EU.

ANNEXES

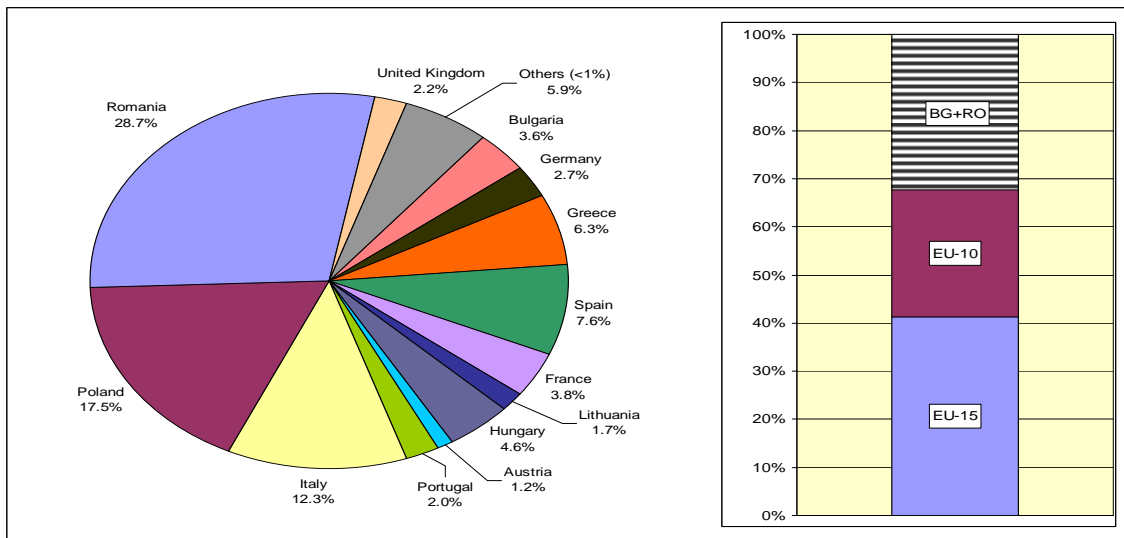
A.1 Economic information on the agricultural sector

Table 1 Importance of Agriculture in total GVA

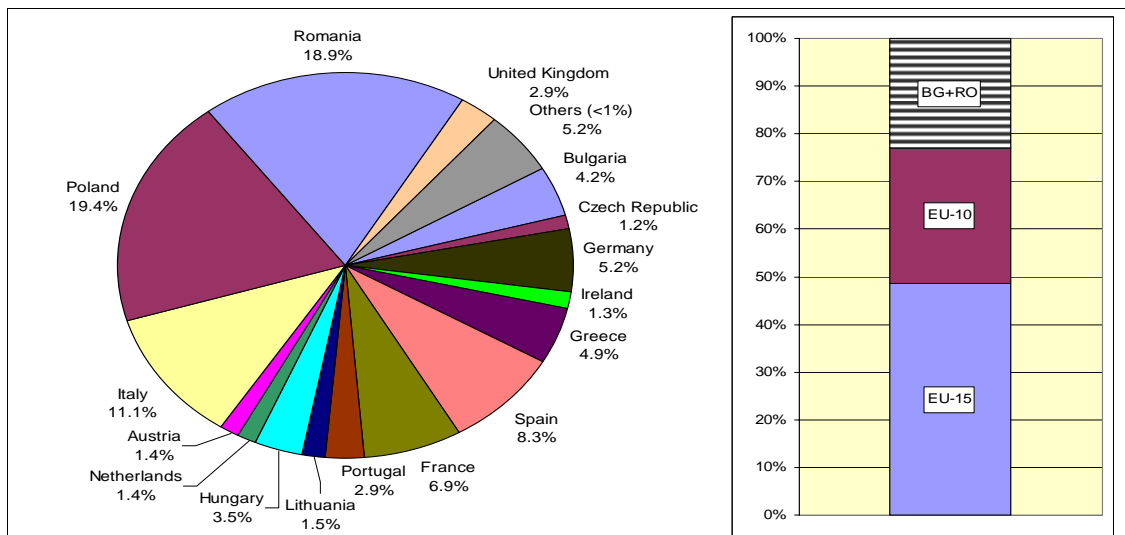
CTRY	2007		2008		2009		2010	
	GVA in agriculture	% of Total GVA	GVA in agriculture	% of Total GVA	GVA in agriculture	% of Total GVA	GVA in agriculture	% of Total GVA
BE	2 638.00	0.88	2 074.00	0.67	2 047.00	0.67	2 205.00	0.70
BG	1 547.50	5.98	2 040.20	6.91	1 450.40	4.83	1 631.30	5.26
CZ	2 819.60	2.46	3 386.90	2.54	2 794.10	2.27	n.a.	n.a.
DK	2 267.70	1.18	1 946.80	0.98	1 753.90	0.92	2 522.50	1.25
DE	20 940.00	0.96	19 960.00	0.90	17 310.00	0.81	19 480.00	0.87
EE	439.40	3.17	396.10	2.77	309.30	2.58	441.40	3.48
IE	2 380.70	1.43	2 083.70	1.30	1 421.20	0.98	1 365.50	0.98
GR	6 877.40	3.44	6 574.50	3.14	6 620.00	3.14	6 626.60	3.26
ES	27 201.00	2.88	26 494.00	2.66	25 955.00	2.65	26 062.00	2.68
FR	37 476.00	2.21	35 738.00	2.04	30 010.50	1.74	n.a.	n.a.
IT	28 480.60	2.06	28 517.10	2.02	25 885.60	1.89	26 369.50	1.90
CY	309.00	2.18	346.10	2.26	346.10	2.27	364.80	2.32
LV	667.90	3.58	629.40	3.05	550.40	3.29	666.10	4.14
LT	1 009.00	3.94	1 075.50	3.72	802.20	3.36	859.20	3.51
LU	134.90	0.40	127.90	0.36	103.30	0.30	113.60	0.30
HU	3 425.30	3.97	3 856.70	4.25	2 605.00	3.31	2 895.30	3.49
MT	112.90	2.39	94.70	1.83	103.90	2.05	102.80	1.89
NL	10 548.00	2.08	9 566.00	1.81	8 798.00	1.73	10 307.00	1.95
AT	4 332.50	1.76	4 386.60	1.71	3 794.10	1.53	3 961.00	1.54
PL	11 775.00	4.33	11 872.70	3.73	10 054.80	3.64	11 035.90	3.54
PT	3 583.30	2.45	3 595.20	2.41	3 625.90	2.44	3 678.10	2.43
RO	7 193.40	6.51	9 266.90	7.44	7 484.80	7.09	7 295.10	6.74
SI	760.70	2.51	823.00	2.51	756.00	2.45	757.40	2.41
SK	2 007.50	4.06	2 466.30	4.21	2 256.30	3.94	2 313.70	3.84
FI	4 723.00	3.01	4 641.00	2.87	4 033.00	2.71	4 531.00	2.89
SE	5 078.50	1.71	5 182.50	1.77	4 486.70	1.77	5 661.90	1.88
UK	12 607.80	0.69	12 755.60	0.78	10 139.90	0.72	11 207.20	0.74
EU27	201 324.30	1.82	199 903.50	1.79	175 492.80	1.66	190 019.40	1.73
EU15	169 257.10	1.65	163 649.10	1.59	145 979.60	1.49	158 526.50	1.56
EU12	32 067.20	4.19	36 254.40	4.16	29 513.20	3.81	31 492.90	3.79

A.2 Structural information (*)

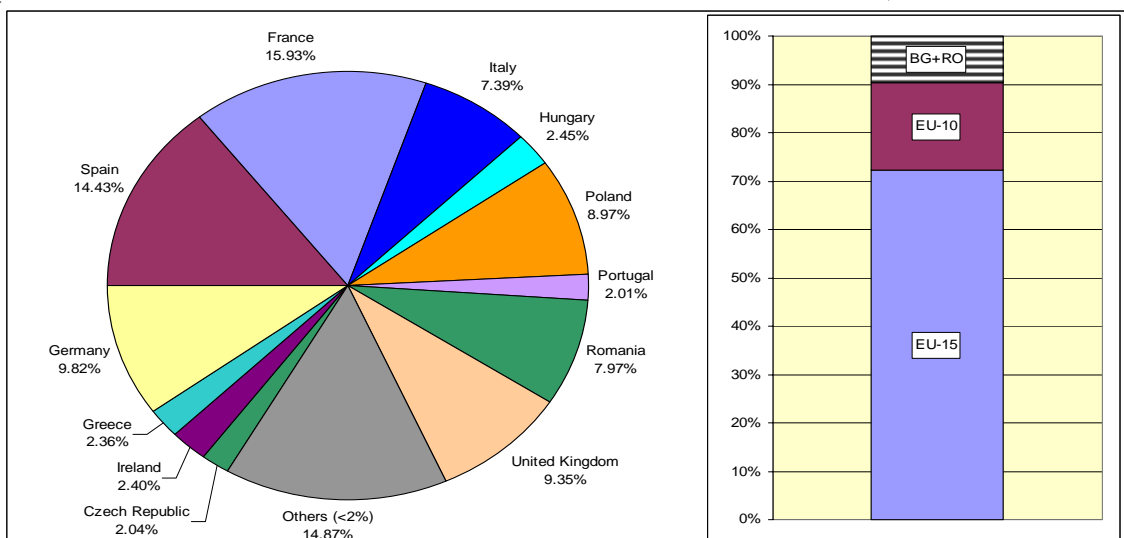
Graph 34 Distribution of farms in the EU between Member States, 2007



Graph 35 Distribution of agricultural workforce in the EU between Member States, 2007

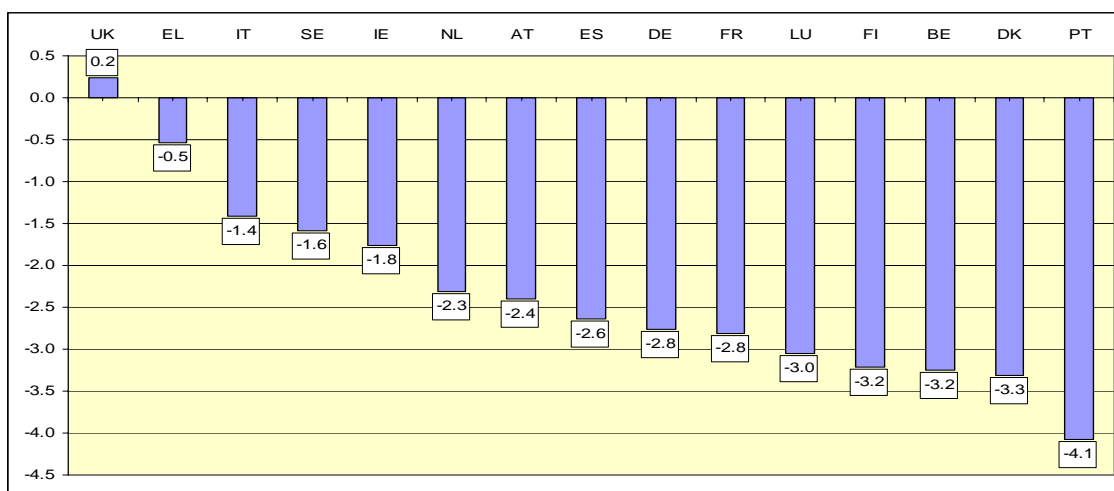


Graph 36 Distribution of the UAA in the EU between Member States, 2007

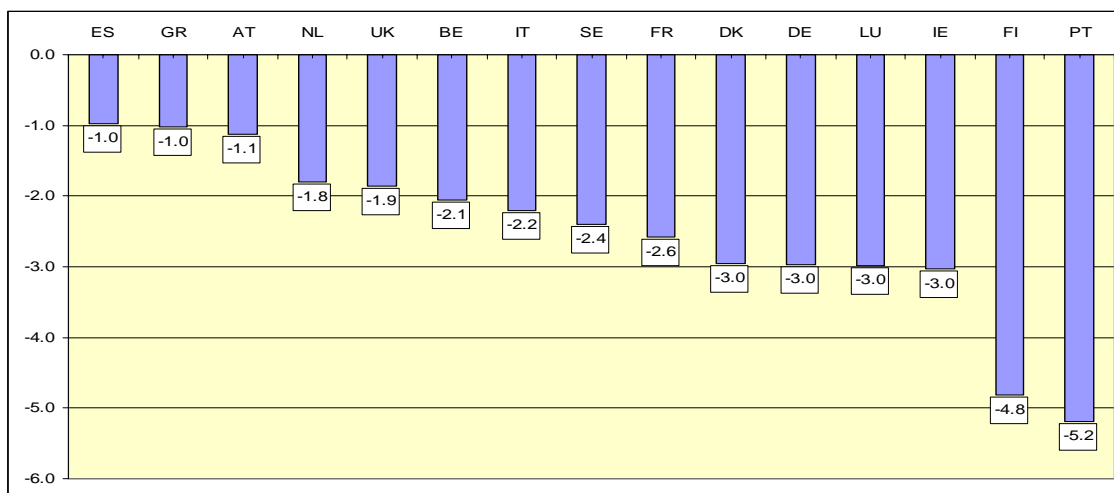


(*) Source: Eurostat, Farm Structure Survey

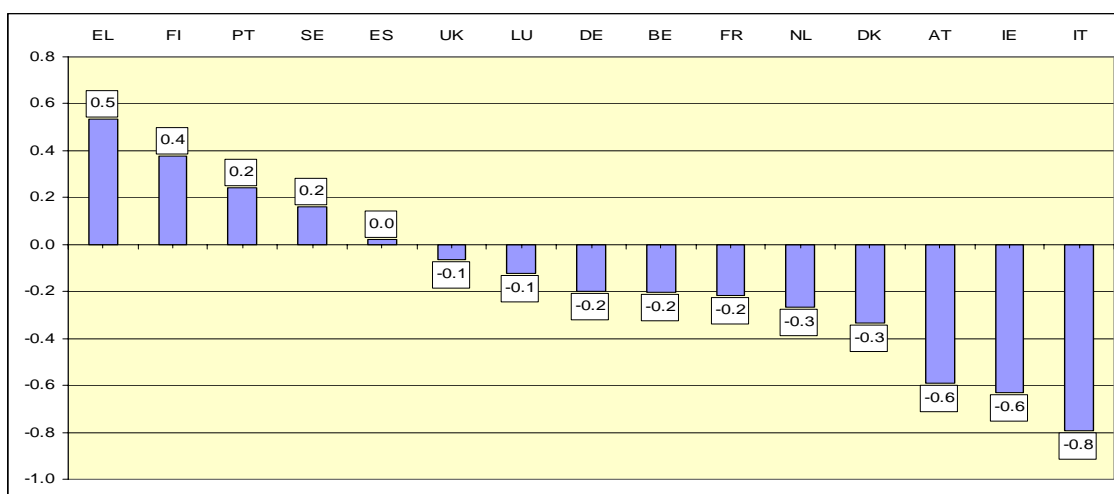
Graph 37 Annual rate of change (%) in the number of farms in the EU-15 (*)



Graph 38 Annual rate of change (%) in the agricultural workforce in the EU-15 (*)

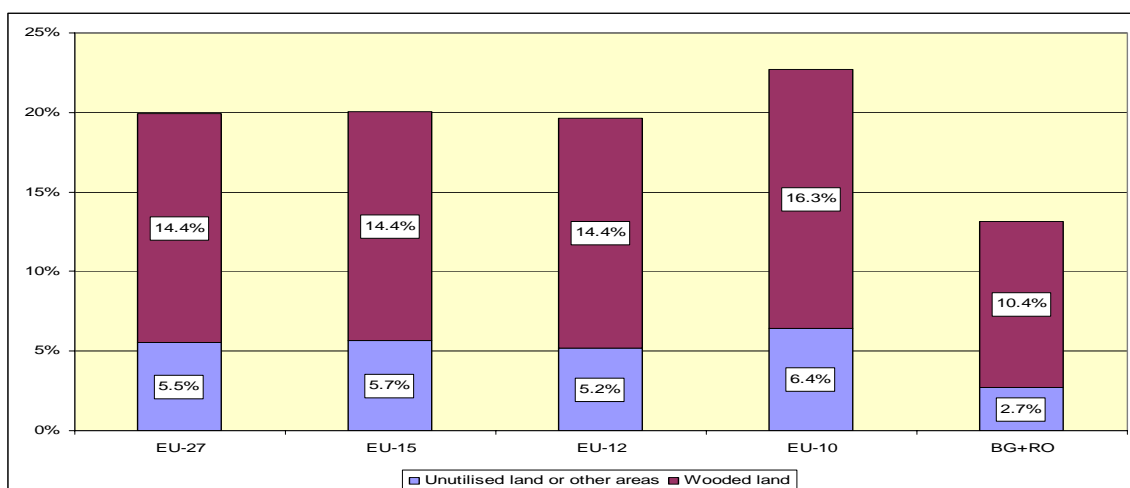


Graph 39 Annual rate of change (%) in the UAA in the EU-15 (*)

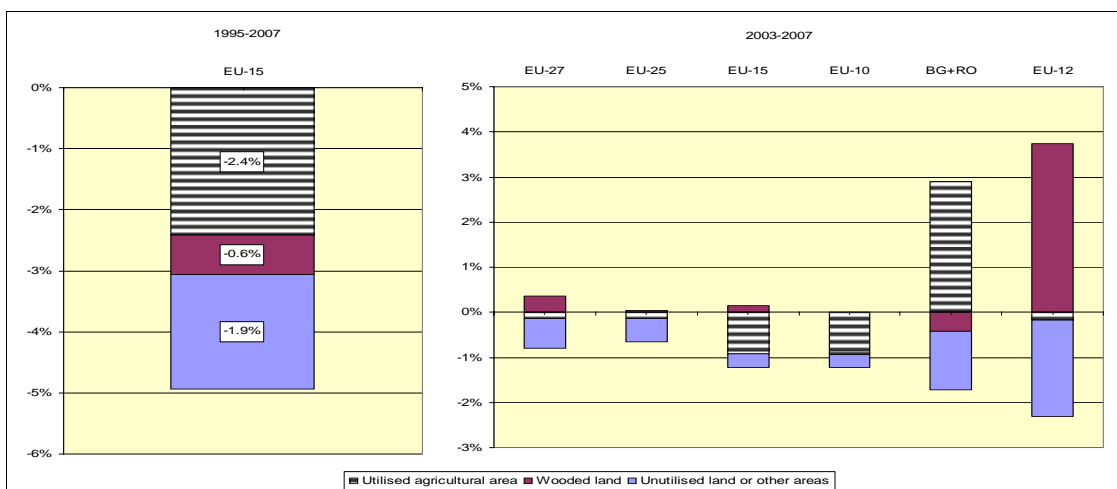


(*): the period covered (over the range 1975 to 2007) varies between Member States according to the availability of data, the year of accession and the processing necessary to circumvent the influence of the changes in coverage of the surveys.

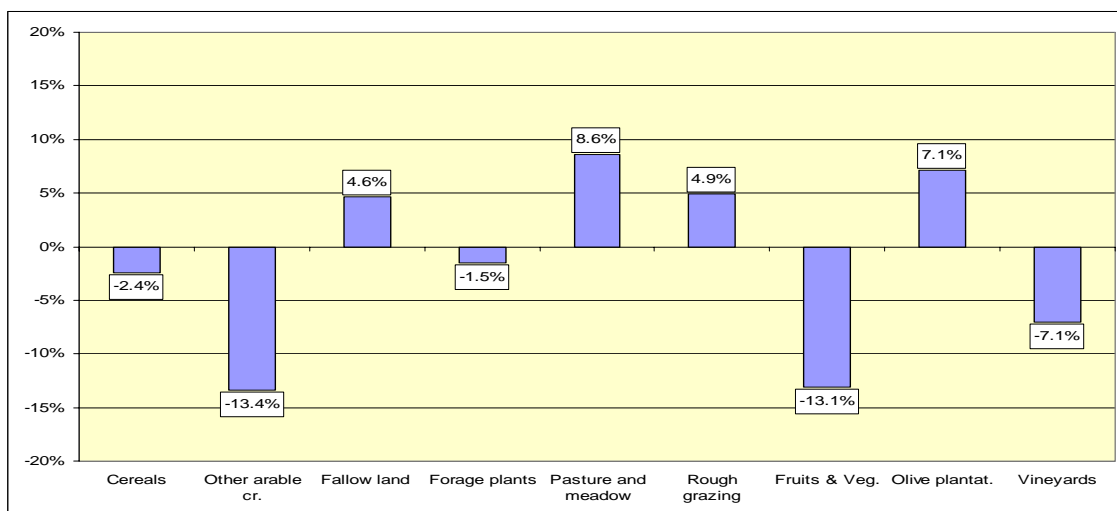
Graph 40 Share of non-used agricultural area in the total area of the farms in EU – 2007



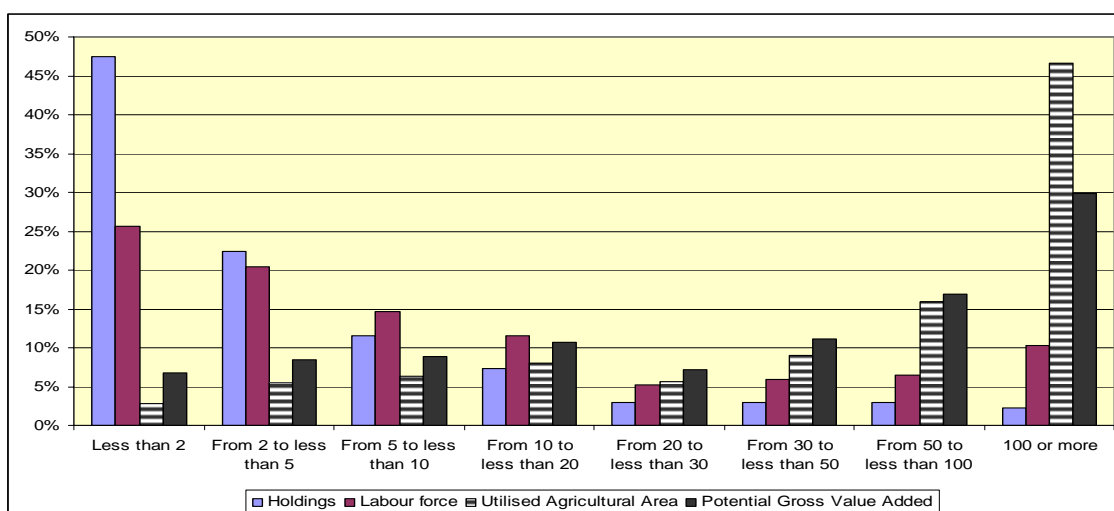
Graph 41 Total variation of area by type of utilisation (as % of total area of the farm) in EU - 1995-2007



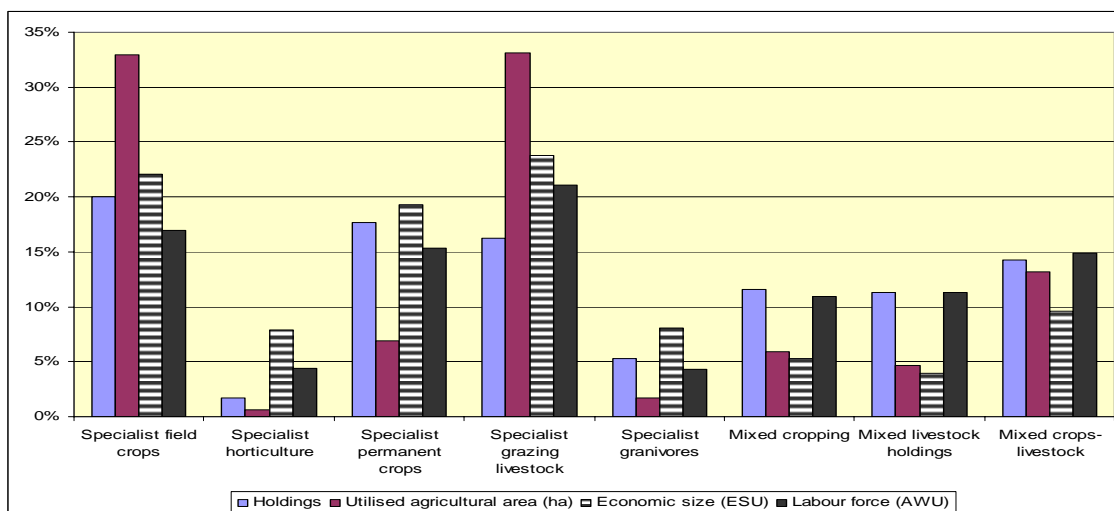
Graph 42 Change (in %) of the area by main groups of production in EU-15 – 1995-2007



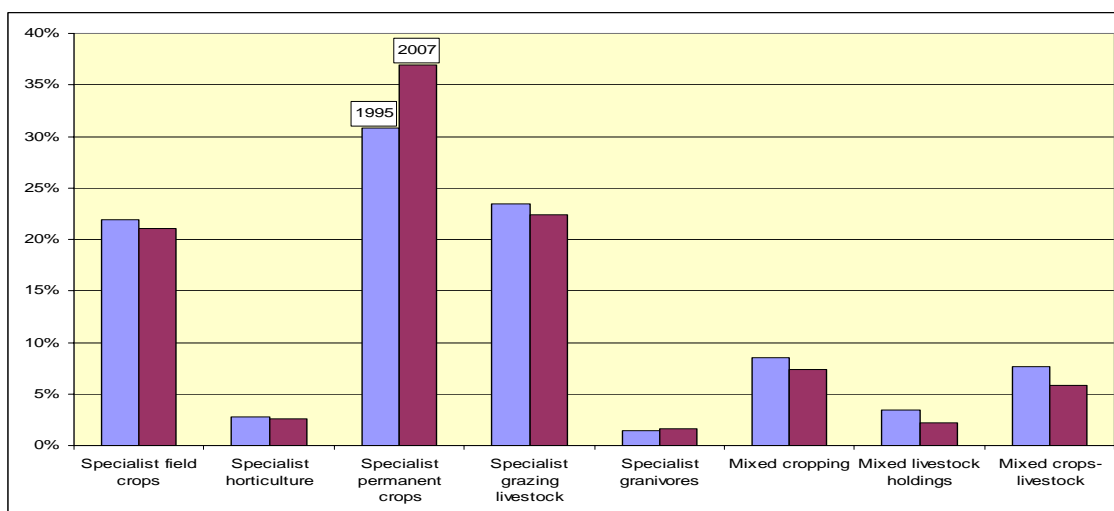
Graph 43 Distribution of the factors of production by farm size in area in EU-27 – 2007



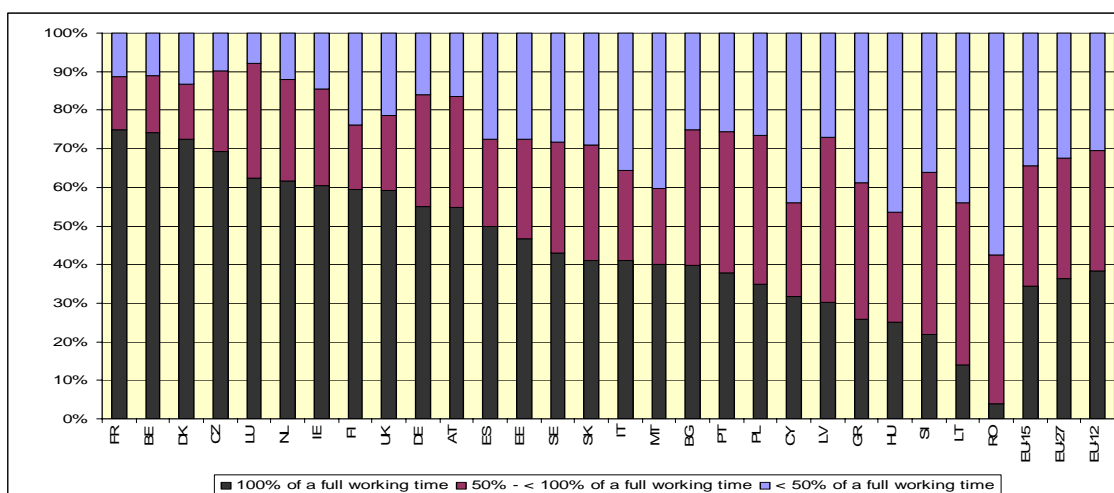
Graph 44 Distribution of the factors of production by type of farm in EU-27 – 2007



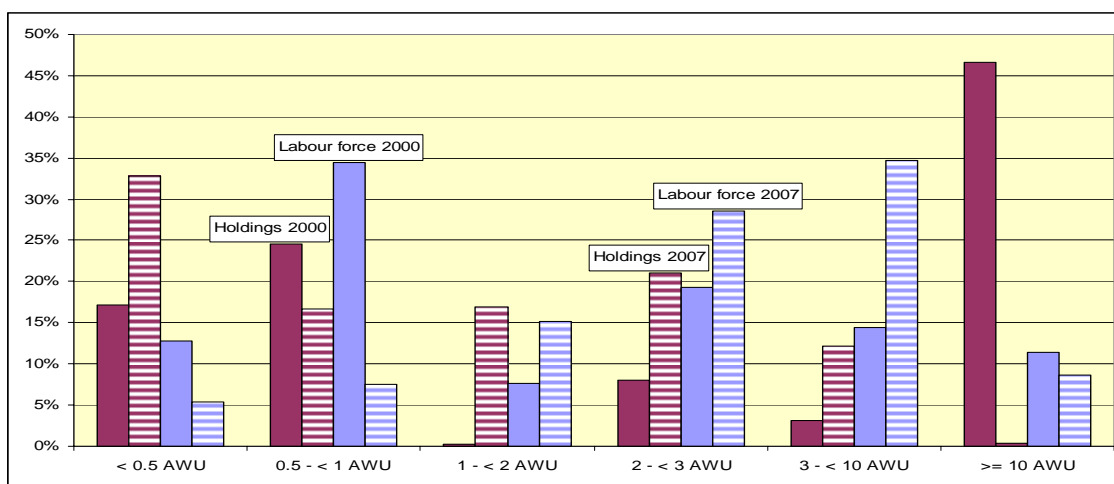
Graph 45 Evolution of distribution of holdings by type of farm in EU-15 1995-2007



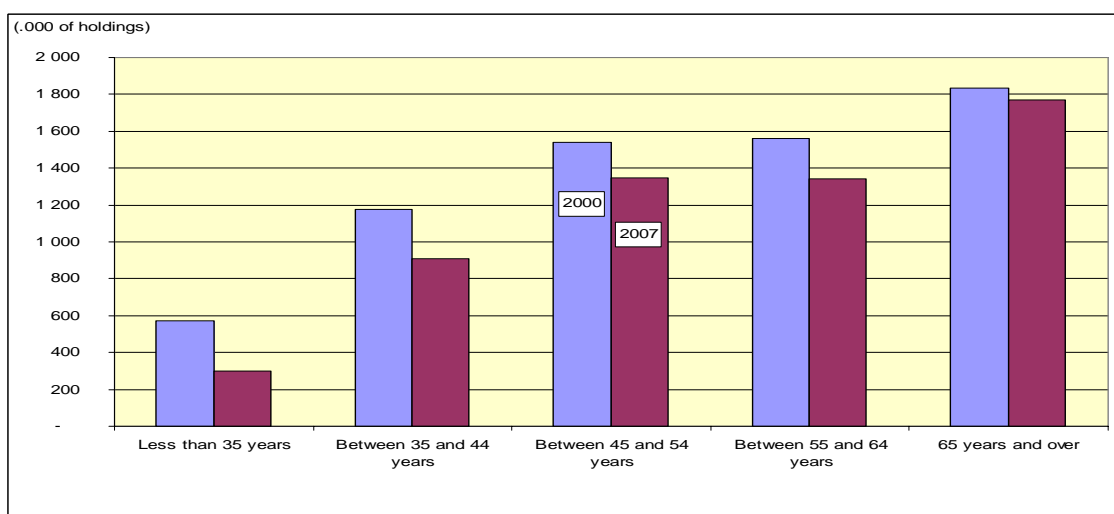
Graph 46 Distribution of the (family and non-family) labour force working regularly in agriculture according to working time in agriculture in the EU – 2007



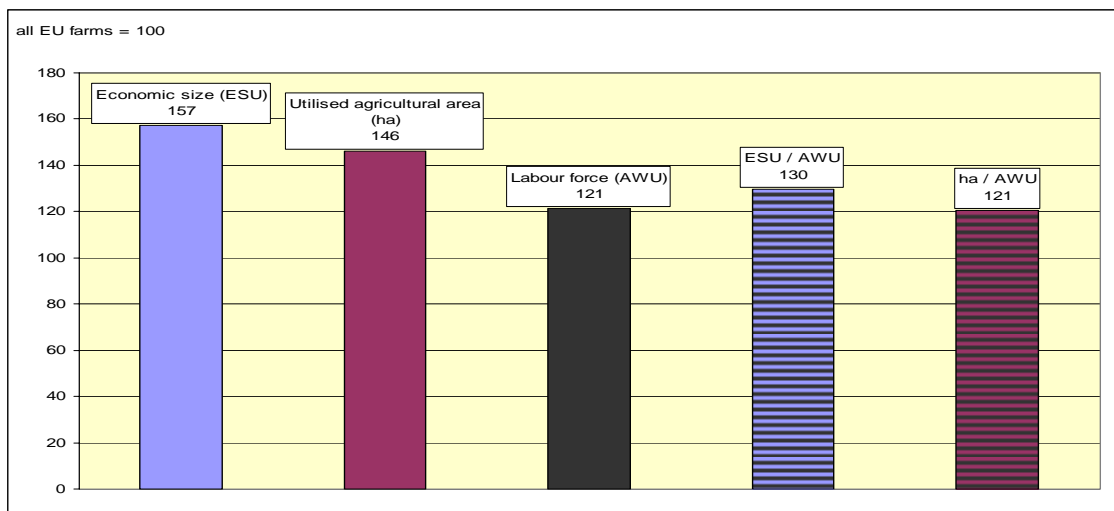
Graph 47 Development of the distributions of holdings and of labour force by category of level of labour force per holding in EU-15 – 2000-2007



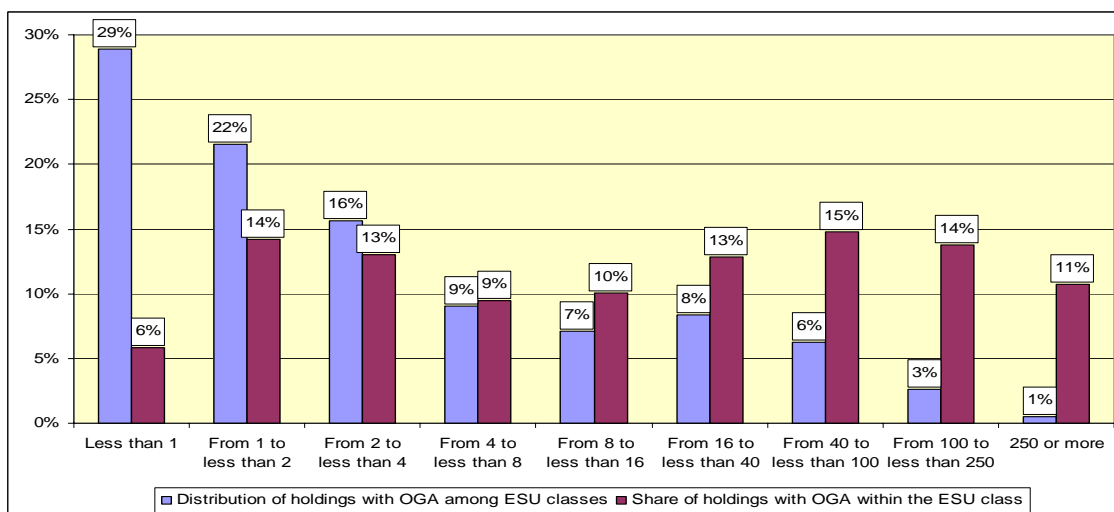
Graph 48 Number of holdings by category of age of the managers in EU-15 – 2000-2007



Graph 49 Average farm of managers younger than 45 years in EU-27 – 2007 (All farms of EU-27 = 100)



Graph 50 Distribution of holdings with non-agricultural gainful activities by category of economic farm size and share of holdings with non-agricultural gainful activities within the categories of economic farm size in EU-27 – 2007



A.3 Information on rural areas

A revised urban-rural typology

The new typology builds on a simple two-step approach to identify population in urban areas:

- a population density threshold (300 inhabitants per km²) applied to grid cells of 1 km²;
- a minimum size threshold (5 000 inhabitants) applied to grouped grid cells above the density threshold

The population living in rural areas is the population living outside the urban areas identified through the method described above.

To determine the population size, the grid cells are grouped based on contiguity (including the diagonals); see below. If the central square is above the density threshold, it will be grouped with each of the other surrounding eight cells that exceed the density threshold.

The approach based on the 1 km² population grid classifies 68% of the EU-27 population as living in urban areas and 32% as living in rural areas. This share is 5 percentage points higher than under the original OECD definition. However, the share of population in rural LAU2s (defined as MAU2s with at least 50% of the residents living in rural areas) is 28%, i.e. very similar to that of the OECD. This classification will be further refined in the future.

See also:

http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Urban-rural_typology

Table 2 Share of employment in the primary sector (NACE A_B: agriculture, hunting, forestry and fishing). 2008

CTRY	Predominantly Rural	Intermediate Region	Predominantly Urban	National	Number of Persons (in thousands)
BE	5.6	3.0	1.2	1.9	83.00
BG	28.8	21.5	2.3	19.6	731.60
CZ	5.6	3.2	1.9	3.6	187.60
DK	4.6	2.9	0.3	2.8	83.00
DE	4.6	2.6	0.9	2.1	845.60
EE	9.0	1.4		4.7	30.60
IE	7.9		0.5	5.5	116.90
GR	23.6	13.2	1.1	11.3	545.20
ES	11.9	5.9	1.7	4.5	925.30
FR	6.1	3.3	1.2	3.3	834.30
IT	7.9	4.6	1.3	4.0	1 013.90
CY		4.5		4.5	17.50
LV	16.2	14.4	4.1	9.7	108.40
LT	17.0	7.7	3.3	10.3	157.90
LU		1.7		1.6	5.50
HU	11.2	8.8	0.6	7.6	327.40
MT			2.6	2.4	4.30
NL	5.3	5.3	2.3	3.0	208.30
AT				5.4	2 236.30
PL	27.4	12.0	3.8	14.7	604.20
PT	23.2	13.3	2.7	11.2	2 839.90
RO	38.9	29.6	1.1	30.3	87.00
SI	13.4	6.1		9.0	79.80
SK	5.4	3.0	1.0	3.7	121.80
FI	8.6	4.5	0.6	4.9	100.20
SE	3.8	2.4	0.4	2.1	374.00
UK	7.1	2.4	0.7	1.7	231.30
EU-27	14.2	6.3	1.4	5.8	12 900.80
EU-15	8.8	3.8	1.2	3.4	6 092.50
EU-12	23.7	14.9	2.8	15.2	6 808.30

Source: Eurostat
 Results at national level: Economic Accounts
 Results by "Type of area": Economic Accounts.

Map 1 Importance of primary sector in employment

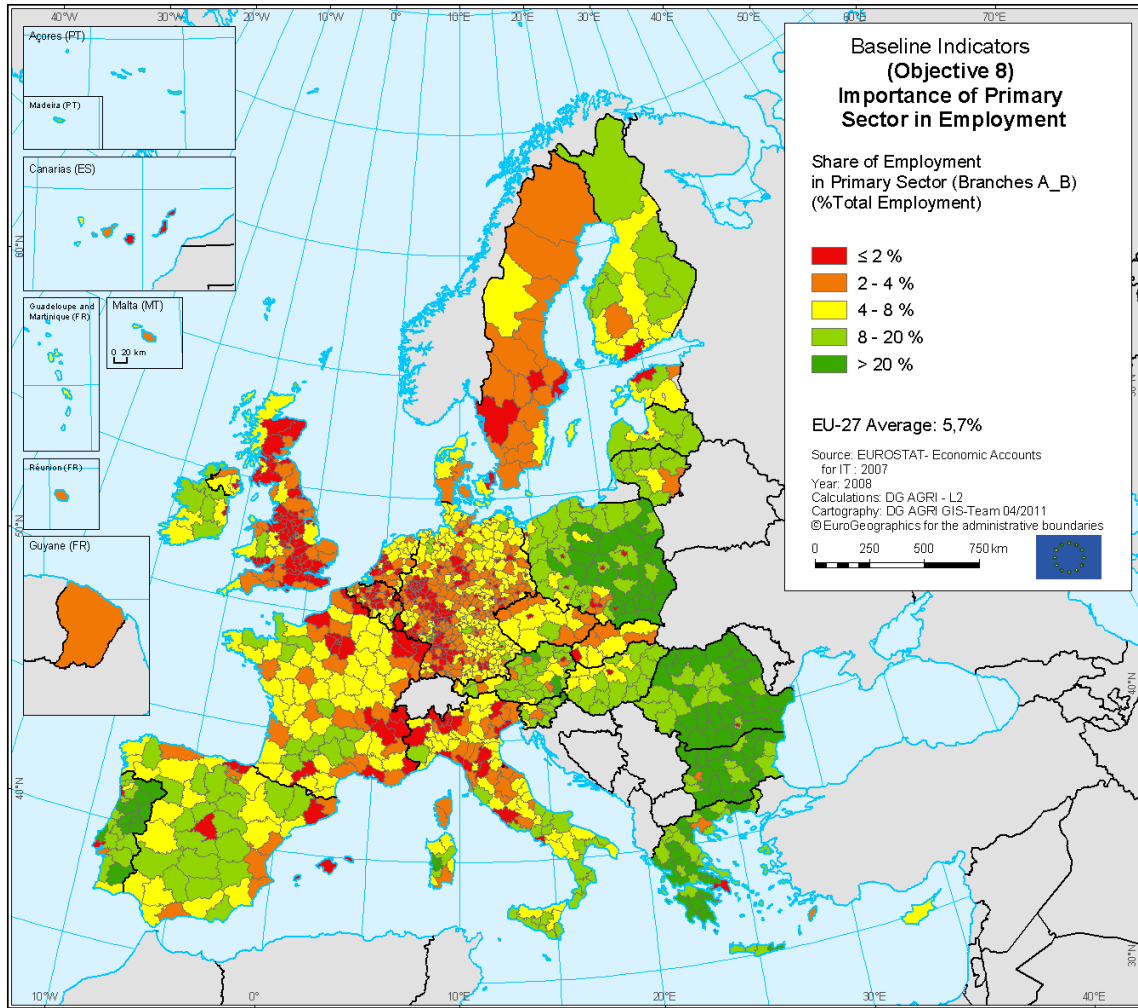


Table 3 Share of the GVA in the primary sector (NACE A_B: agriculture, hunting, forestry and fishing). 2008

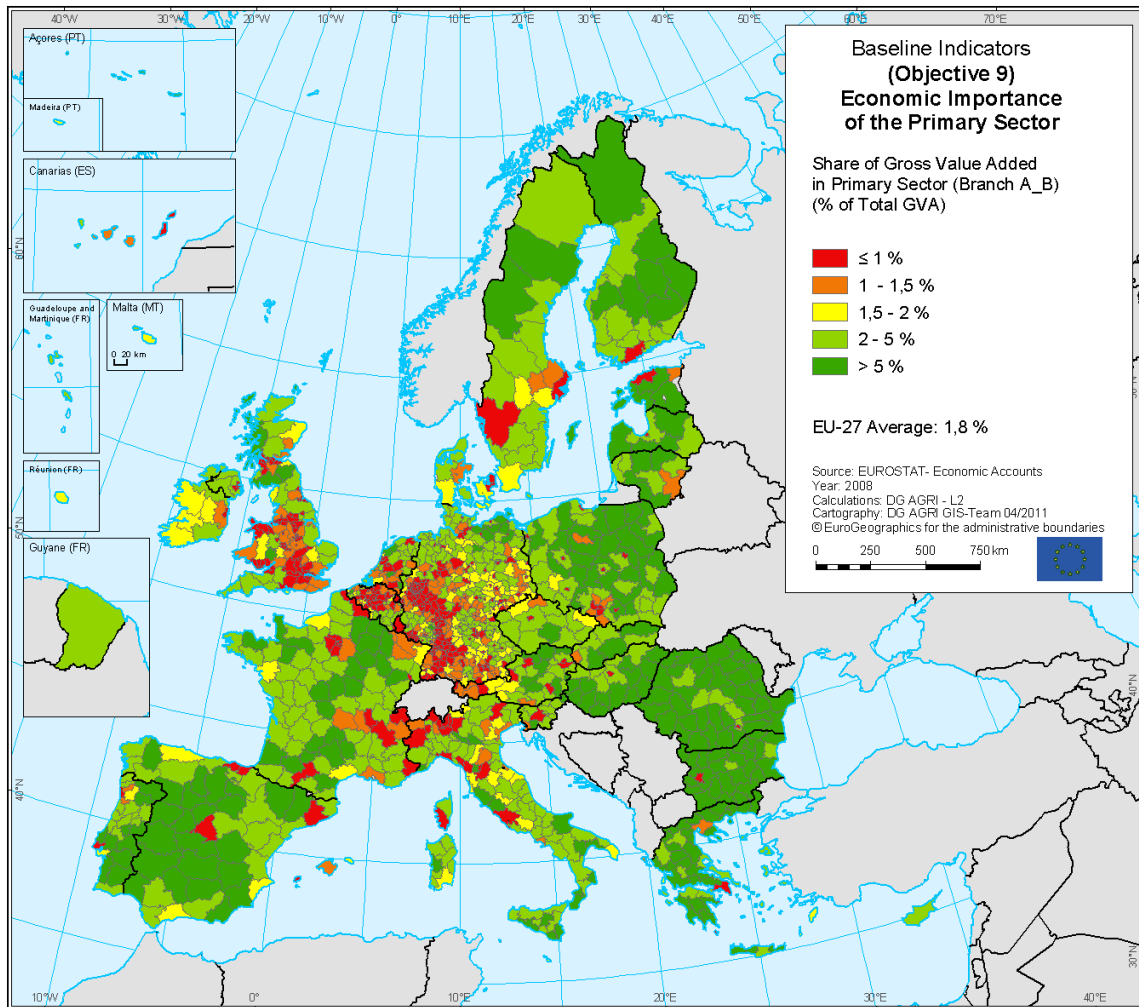
CTRY	Predominantly Rural	Intermediate Regions	Predominantly Urban	National		Million Euro
BE	2.52	1.26	0.39	0.67		1 852.40
BG	15.58	7.64	0.32	6.91		4 774.90
CZ	4.53	2.41	1.17	2.54		4 817.40
DK	2.11	1.21	0.14	1.24		1 411.20
DE	2.18	1.18	0.32	0.90		19 161.00
EE	6.70	0.90		2.77		561.00
IE	2.09		0.13	1.30		1 711.60
GR	6.70	4.06	0.52	3.14		7 318.50
ES	7.77	3.64	0.98	2.66		28 736.30
FR	4.21	2.68	0.56	2.04		31 425.20
IT	3.69	2.57	0.73	2.06	2 007	28 253.20
CY		2.26		2.26		386.70
LV	7.21	5.75	1.22	3.05		874.60
LT	7.97	2.95	1.06	3.72		1 710.40
LU		0.36		0.36		110.30
HU	7.79	5.34	0.22	4.25		5 878.60
MT			1.95	1.95		131.20
NL	2.25	3.03	1.41	1.83		8 827.20
AT	3.87	1.18	0.47	1.71		4 016.80
PL	8.43	3.33	0.84	3.69		17 563.30
PT	5.36	3.30	0.61	2.35		4 324.30
RO	13.04	7.47	0.33	7.45		16 662.50
SI	4.11	1.60		2.51		1 017.80
SK	6.84	3.33	1.22	4.21		3 744.40
FI	5.40	2.78	0.36	2.87		3 938.60
SE	4.37	1.68	0.17	1.77		4 416.60
UK	3.97	1.86	0.38	0.77		12 393.70
EU27	4.49	2.33	0.58	1.80		199 903.50
EU15	3.89	2.17	0.56	1.60		156 073.30
EU12	8.31	3.96	0.81	4.15		43 830.20

Source: Eurostat

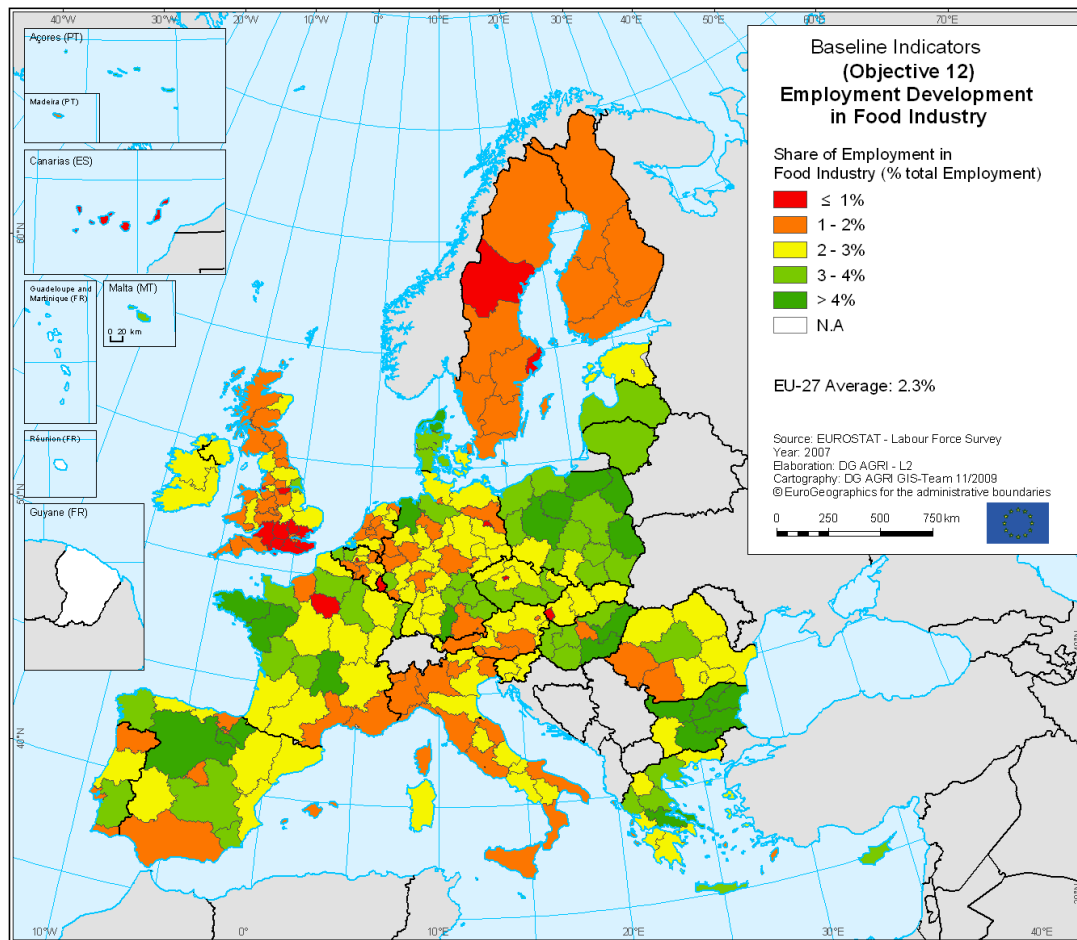
Results at national level: Economic Accounts

Results by "Type of area": Economic Accounts.

Map 2 Importance of the primary sector in GVA



Map 3 Employment in the food industry



Source: DG AGRI – Rural Development in the European Union, Report 2009

Table 4 Income per inhabitant (index of EU-27 =100) – 2008

CTRY	Predominantly Rural	Intermediate Regions	Predominantly Urban	National
BE	72.8	91.6	128.1	114.6
BG	28.5	35.7	99.7	43.4
CZ	65.7	68.5	123.3	80.4
DK	112.0	106.7	171.6	122.8
DE	97.0	103.8	134.3	115.6
EE	45.4	88.7		67.8
IE	110.0		194.1	133.1
GR	79.7	88.6	107.4	93.5
ES	84.0	96.0	114.1	103.2
FR	83.1	93.8	137.7	106.3
IT	94.2	100.1	112.9	103.4
CY		97.0		97.0
LV	33.4	44.0	77.7	56.3
LT	42.2	59.8	94.4	60.9
LU		278.4		278.4
HU	46.8	50.3	142.7	64.4
MT			77.6	77.6
NL	157.2	122.8	137.2	133.3
AT	96.1	135.1	147.1	123.9
PL	40.7	51.1	82.8	56.1
PT	64.5	58.2	93.5	77.6
RO	32.6	45.2	112.9	46.5
SI	76.4	101.9		90.9
SK	58.5	62.4	166.5	72.2
FI	99.7	107.4	158.7	117.6
SE	107.9	111.6	167.6	122.7
UK	75.5	97.7	123.3	115.2
EU27	73.1	99.2	123.6	25 100 pps
EU15	90.0	114.1	126.6	110.7
EU12	42.6	54.1	98.8	58.7

Source: Eurostat

Results at national level: Economic Accounts

Results by "Type of area": Economic Accounts and Demographic Statistics

Map 4 Economic development: GDP per capita at regional level

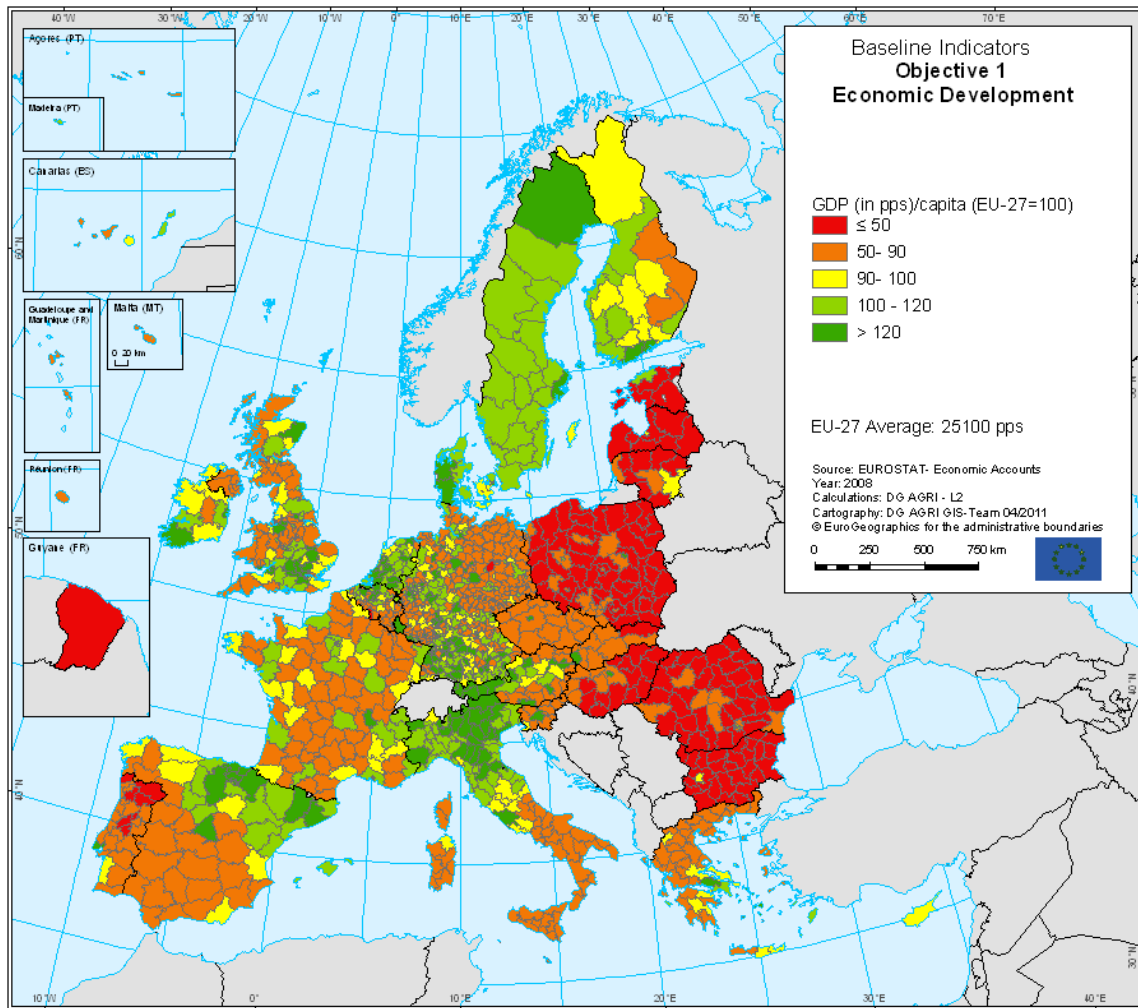


Table 5 Population density (inhabitants/km²) by type of area – 2008

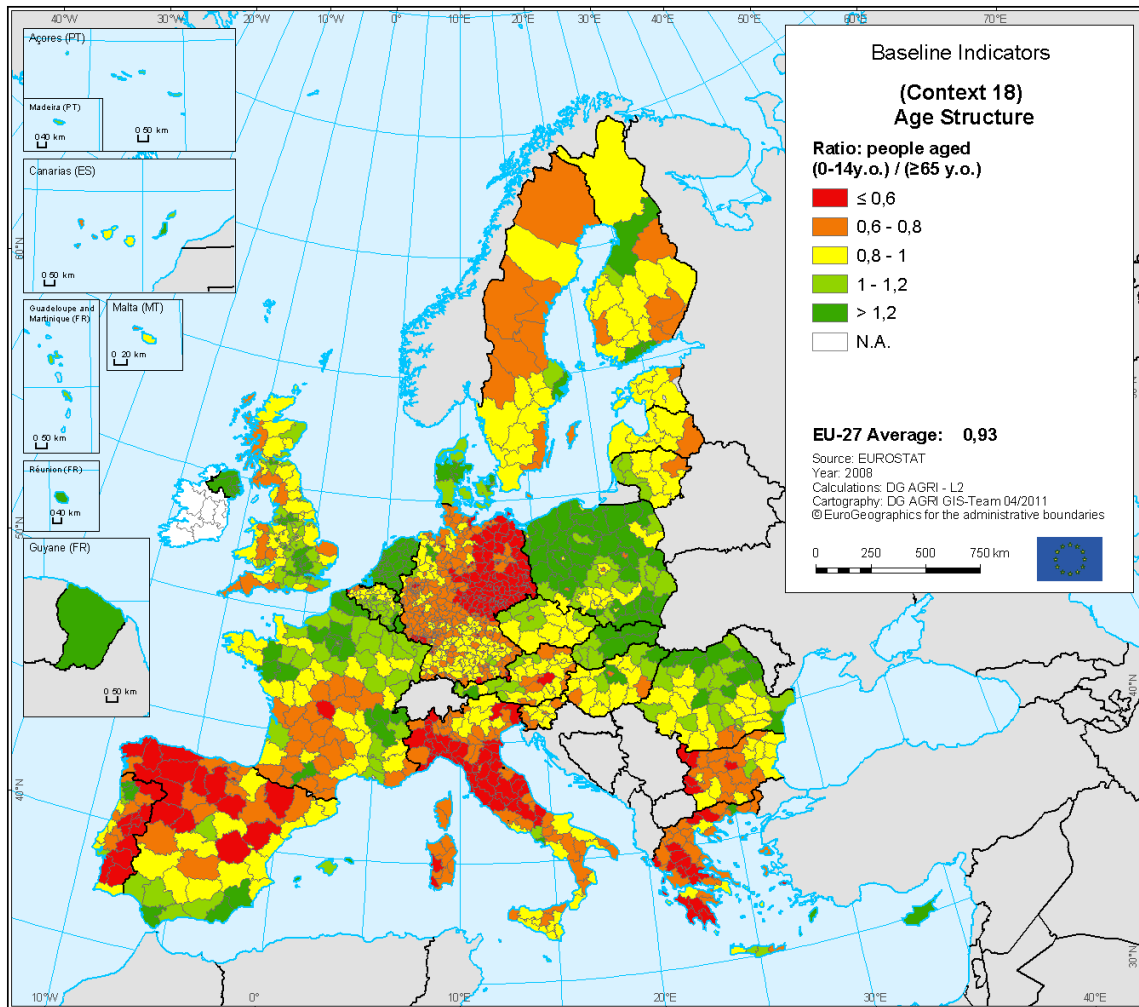
CTRY	Predominantly Rural	Intermediate Regions	Predominantly Urban	National
BE	89.9	264.3	692.3	352.4
BG	49.6	68.3	922.2	68.6
CZ	92.7	158.0	216.0	134.9
DK	76.0	169.5	2 245.3	127.5
DE	100.7	190.2	827.3	229.9
EE	18.1	90.2		30.9
IE	47.6		1 322.8	64.7
GR	44.9	74.4	710.3	85.9
ES	25.9	87.2	302.6	90.0
FR	45.0	132.9	445.7	101.4
IT	91.3	210.9	587.7	202.7
CY		85.7		85.7
LV	22.2	23.0	109.4	36.4
LT	35.8	84.1	90.1	53.6
LU		189.1		189.1
HU	76.9	116.4	3 250.8	107.9
MT			1 305.4	1 305.4
NL	145.9	266.1	748.3	486.8
AT	54.4	140.2	389.0	100.2
PL	83.1	119.6	346.6	121.9
PT	49.7	202.4	771.0	115.3
RO	72.1	102.6	1 278.6	93.5
SI	71.1	146.2		100.4
SK	94.2	114.7	299.1	110.3
FI	9.0	36.7	219.3	17.5
SE	9.6	27.6	301.4	22.5
UK	26.8	138.0	694.9	250.1
EU27	48.4	119.8	516.4	115.7
EU15	41.9	124.6	558.1	122.1
EU12	67.2	105.7	315.3	96.5

Source: Eurostat

Results at national level: Demographic Statistics

Results by "Type of area": Demographic Statistics

Map 5 Age structure (*)



A.4 Medium-term perspectives for agricultural markets

Table A.4 1 Total cereal market projections for the EU, 2009-2020 (mio t)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Usable production	294.7	280.7	294.0	289.6	293.4	295.0	298.4	301.7	304.5	307.3	310.4	312.9
of which EU-15	212.2	200.0	211.4	207.6	209.9	210.6	212.6	214.6	216.2	217.7	219.5	220.9
EU-12	82.6	80.7	82.7	82.0	83.5	84.4	85.7	87.1	88.3	89.5	90.8	92.0
Consumption	279.5	278.4	276.8	278.4	280.4	283.3	287.6	290.4	293.8	296.6	299.2	300.9
of which EU-15	212.3	211.9	210.0	211.3	213.0	215.6	219.3	221.7	224.5	226.9	229.1	230.6
EU-12	67.2	66.4	66.7	67.1	67.4	67.7	68.3	68.7	69.3	69.7	70.1	70.3
of which food and industri	64.9	64.5	65.4	65.5	65.8	65.9	66.0	66.2	66.3	66.5	66.7	66.8
of which feed	172.3	171.0	167.4	168.9	168.9	169.2	169.3	168.9	169.8	170.7	171.2	171.7
of which bioenergy	7.8	8.7	9.1	9.0	10.7	13.3	17.1	20.2	22.6	24.7	26.3	26.9
Imports	8.0	9.5	10.0	11.5	11.1	11.2	11.4	11.5	12.1	12.5	12.5	12.4
Exports	27.2	29.3	28.2	23.7	23.4	23.0	23.1	23.3	22.9	22.8	22.8	23.3
Beginning stocks	57.1	53.1	36.6	35.6	34.6	35.2	35.0	34.0	33.4	33.1	33.2	33.8
Ending stocks	54.2	37.2	36.4	35.4	36.1	35.9	34.9	34.3	34.0	34.1	34.7	35.4
of which intervention	6.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Note: years refer to campaign years (e.g. 2009 refers to the marketing period of the Summer 2009 harvest, i.e. July 2009 to June 2010)

Table A.4 2 Total wheat market projections for the EU, 2009-2020 (mio t)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Usable production	138.5	135.9	146.2	141.1	143.1	143.2	145.1	146.9	148.4	149.6	151.1	152.3
of which EU-15	105.6	104.4	112.0	107.9	109.1	108.9	110.1	111.2	112.0	112.6	113.5	114.1
EU-12	32.9	31.5	34.2	33.2	33.9	34.2	35.0	35.7	36.4	36.9	37.6	38.2
Consumption	128.7	125.6	126.4	126.9	128.5	130.2	132.7	134.0	135.7	136.4	137.7	138.1
of which EU-15	104.4	102.3	102.6	103.0	104.4	105.9	108.1	109.3	110.7	111.3	112.5	112.8
EU-12	24.3	23.3	23.8	23.9	24.1	24.3	24.5	24.7	25.0	25.1	25.3	25.3
of which food and industrie	55.4	55.0	55.9	55.9	56.3	56.3	56.4	56.6	56.8	56.9	57.1	57.2
of which feed	56.6	54.2	53.4	54.0	54.2	54.3	54.4	54.2	54.6	54.8	55.0	55.0
of which bioenergy	3.9	3.8	3.7	3.3	4.3	5.9	7.9	9.4	10.5	11.1	11.6	11.4
Imports	5.3	5.1	4.5	5.3	5.4	5.4	5.4	5.1	5.1	4.9	4.7	4.5
Exports	21.4	20.7	23.0	19.2	18.7	18.3	18.3	18.5	18.1	18.1	18.1	18.8
Beginning stocks	22.3	16.1	11.3	12.4	12.8	13.9	14.0	13.4	12.9	12.5	12.5	12.5
Ending stocks	17.2	12.0	13.2	13.6	14.8	14.9	14.3	13.8	13.4	13.4	13.4	13.4
of which intervention	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Note: years refer to campaign years (e.g. 2009 refers to the marketing period of the Summer 2009 harvest, i.e. July 2009 to June 2010)

Table A.4 3 Total coarse grain projections for the EU, 2009-2020 (mio t)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Usable production	156.2	144.7	147.8	148.6	150.3	151.8	153.3	154.8	156.1	157.7	159.2	160.6
of which EU-15	106.6	95.6	99.3	99.7	100.8	101.7	102.5	103.4	104.2	105.1	106.0	106.8
EU-12	49.6	49.1	48.5	48.8	49.5	50.1	50.8	51.4	52.0	52.6	53.2	53.8
Consumption	150.8	152.8	150.4	151.6	151.9	153.1	154.9	156.4	158.1	160.1	161.5	162.8
of which EU-15	107.9	109.6	107.5	108.3	108.6	109.6	111.1	112.3	113.8	115.5	116.6	117.8
EU-12	42.9	43.2	43.0	43.3	43.3	43.4	43.8	44.0	44.3	44.6	44.9	45.0
of which food and industrial	9.5	9.5	9.5	9.5	9.5	9.5	9.6	9.6	9.6	9.6	9.6	9.6
of which feed	115.6	116.8	114.0	115.0	114.7	114.9	114.9	114.7	115.2	115.9	116.1	116.7
of which bioenergy	3.9	4.9	5.4	5.7	6.4	7.4	9.2	10.8	12.1	13.5	14.7	15.5
Imports	2.8	4.4	5.5	6.2	5.8	5.8	6.1	6.3	7.1	7.6	7.8	7.9
Exports	5.7	8.6	5.2	4.5	4.7	4.7	4.7	4.8	4.7	4.8	4.8	4.6
Beginning stocks	34.7	37.0	25.3	23.1	21.8	21.3	21.0	20.6	20.5	20.6	20.7	21.2
Ending stocks	37.0	25.3	23.1	21.8	21.3	21.0	20.6	20.5	20.6	20.7	21.2	22.0
of which intervention	5.7	1.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Note: years refer to campaign years (e.g. 2009 refers to the marketing period of the Summer 2009 harvest, i.e. July 2009 to June 2010)

Table A.4 4 Soft wheat market projections for the EU, 2009-2020 (mio t)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Usable production	129.8	127.6	137.1	132.2	134.1	134.2	136.0	137.7	139.1	140.2	141.7	142.7
of which EU-15	97.0	96.2	103.1	99.2	100.3	100.1	101.2	102.2	102.9	103.4	104.2	104.7
EU-12	32.8	31.4	34.0	33.0	33.8	34.1	34.8	35.5	36.2	36.8	37.4	38.0
Consumption	118.8	116.1	116.9	117.1	118.7	120.4	122.8	124.2	125.8	126.5	127.9	128.2
of which EU-15	94.9	93.2	93.5	93.7	95.0	96.5	98.7	99.9	101.4	101.9	103.1	103.4
EU-12	23.9	22.9	23.4	23.4	23.7	23.9	24.1	24.3	24.5	24.6	24.8	24.8
of which food and industry	47.0	46.6	47.4	47.4	47.7	47.7	47.8	47.9	48.0	48.2	48.3	48.5
of which feed	56.0	53.9	53.0	53.6	53.9	53.9	54.1	53.9	54.3	54.4	54.7	54.6
of which bioenergy	3.9	3.8	3.7	3.3	4.3	5.9	7.9	9.4	10.5	11.1	11.6	11.4
Imports	3.1	3.2	2.8	3.4	3.5	3.5	3.6	3.4	3.4	3.3	3.2	3.1
Exports	20.4	19.5	21.9	18.1	17.7	17.3	17.3	17.4	17.0	17.0	16.9	17.6
Beginning stocks	22.3	16.1	11.3	12.4	12.8	13.9	14.0	13.4	12.9	12.5	12.5	12.5
Ending stocks	16.1	11.3	12.4	12.8	13.9	14.0	13.4	12.9	12.5	12.5	12.5	12.5
of which intervention	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Note: years refer to campaign years (e.g. 2009 refers to the marketing period of the Summer 2009 harvest, i.e. July 2009 to June 2010)

Table A.4 5 Barley market projections for the EU, 2009-2020 (mio t)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Usable production	62.0	54.4	56.8	56.8	57.2	57.4	57.7	58.0	58.2	58.5	58.7	59.0
of which EU-15	50.7	44.3	46.3	46.3	46.4	46.6	46.8	46.9	47.0	47.2	47.3	47.4
EU-12	11.3	10.1	10.5	10.6	10.7	10.8	10.9	11.1	11.2	11.3	11.4	11.5
Consumption	54.7	55.6	54.7	54.9	54.7	54.8	54.8	54.8	54.9	55.0	55.1	55.2
of which EU-15	45.3	46.0	45.1	45.3	45.1	45.1	45.1	45.1	45.1	45.2	45.2	45.3
EU-12	9.4	9.6	9.5	9.6	9.6	9.6	9.7	9.7	9.8	9.8	9.9	9.9
of which food and industry	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4
of which feed	42.3	43.0	42.0	42.4	42.1	42.0	41.8	41.6	41.5	41.5	41.4	41.5
of which bioenergy	0.4	0.7	0.8	0.8	0.9	1.0	1.3	1.5	1.7	1.9	2.1	2.2
Imports	0.1	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Exports	3.6	5.4	3.7	3.4	3.5	3.4	3.5	3.5	3.5	3.5	3.5	3.3
Beginning stocks	14.1	17.9	11.5	10.1	8.9	8.0	7.5	7.1	7.0	7.0	7.2	7.6
Ending stocks	17.9	11.5	10.1	8.9	8.0	7.5	7.1	7.0	7.0	7.2	7.6	8.2
of which intervention	5.5	1.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Note: years refer to campaign years (e.g. 2009 refers to the marketing period of the Summer 2009 harvest, i.e. July 2009 to June 2010)

Table A.4 6 Maize market projections for the EU, 2009-2020 (mio t)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Usable production	57.8	58.2	57.5	58.2	59.5	60.7	61.8	63.0	64.1	65.3	66.4	67.6
of which EU-15	37.1	35.1	35.9	36.4	37.2	38.0	38.7	39.5	40.2	40.9	41.7	42.4
EU-12	20.8	23.1	21.6	21.8	22.3	22.7	23.1	23.5	23.9	24.3	24.8	25.2
Consumption	60.7	63.1	62.0	62.9	63.5	64.6	66.2	67.5	69.1	70.9	72.2	73.4
of which EU-15	42.4	44.2	43.2	43.8	44.3	45.3	46.6	47.8	49.1	50.7	51.7	52.7
EU-12	18.3	18.8	18.8	19.1	19.1	19.3	19.6	19.7	20.0	20.3	20.5	20.7
of which food and industry	4.8	4.8	4.8	4.8	4.8	4.8	4.8	4.8	4.8	4.8	4.8	4.8
of which feed	47.5	49.3	47.9	48.6	48.6	49.0	49.3	49.4	50.0	50.7	51.0	51.6
of which bioenergy	2.3	2.9	3.3	3.5	4.0	4.7	6.0	7.2	8.2	9.3	10.2	10.9
Imports	2.4	3.5	5.1	5.7	5.3	5.3	5.5	5.7	6.4	6.9	7.1	7.2
Exports	2.1	3.1	1.3	1.1	1.1	1.1	1.2	1.2	1.2	1.2	1.2	1.1
Beginning stocks	17.7	15.2	10.8	10.1	10.1	10.3	10.5	10.5	10.5	10.7	10.8	11.0
Ending stocks	15.2	10.8	10.1	10.1	10.3	10.5	10.5	10.5	10.7	10.8	11.0	11.2
of which intervention	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Note: years refer to campaign years (e.g. 2009 refers to the marketing period of the Summer 2009 harvest, i.e. July 2009 to June 2010)

Table A.4 7 Total oilseeds market projections for the EU, 2009-2020 (mio t)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Usable production	29.6	28.9	29.4	30.0	30.3	30.8	31.2	31.6	32.1	32.5	33.0	33.3
of which EU-15	19.5	18.3	18.7	19.0	19.2	19.5	19.7	20.0	20.2	20.4	20.8	20.9
EU-12	10.0	10.5	10.7	10.9	11.1	11.3	11.4	11.6	11.8	12.0	12.2	12.4
Consumption	45.2	44.9	45.6	46.2	46.6	47.0	47.5	47.9	48.4	48.8	49.4	49.8
of which EU-15	38.7	38.4	39.1	39.5	39.9	40.2	40.6	40.9	41.3	41.7	42.2	42.5
EU-12	6.5	6.5	6.6	6.7	6.7	6.8	6.9	7.0	7.0	7.1	7.2	7.3
Imports	16.5	16.3	16.8	16.8	16.9	16.8	16.8	16.8	16.8	16.8	16.9	16.9
Exports	0.8	0.7	0.5	0.5	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6
Beginning stocks	4.7	4.7	4.3	4.4	4.4	4.3	4.3	4.2	4.2	4.1	4.0	4.0
Ending stocks	4.7	4.3	4.4	4.4	4.3	4.3	4.2	4.2	4.1	4.0	4.0	3.9

Note: years refer to campaign years (e.g. 2009 refers to the marketing period of the Summer 2009 harvest, i.e. July 2009 to June 2010)

Table A.4 8 Total oilseed meals market projections for the EU, 2009-2020 (mio t)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Usable production	25.9	26.0	26.4	26.7	26.9	27.1	27.4	27.6	27.9	28.1	28.4	28.7
of which												
EU-15	22.6	22.6	23.1	23.3	23.5	23.6	23.9	24.0	24.2	24.4	24.7	24.9
EU-12	3.3	3.4	3.4	3.4	3.5	3.5	3.6	3.6	3.6	3.7	3.7	3.8
Consumption	50.4	50.4	51.1	51.6	51.9	52.3	52.7	53.1	53.5	53.8	54.2	54.6
of which												
EU-15	43.2	43.1	43.7	44.2	44.4	44.7	45.0	45.3	45.6	45.9	46.2	46.5
EU-12	7.2	7.3	7.4	7.4	7.5	7.6	7.7	7.8	7.9	7.9	8.0	8.1
Imports	25.2	24.2	25.3	25.9	26.2	26.2	26.1	26.1	26.3	26.4	26.6	26.7
Exports	0.7	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6
Beginning stocks	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Ending stocks	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2

Note: years refer to campaign years (e.g. 2009 refers to the marketing period of the Summer 2009 harvest, i.e. July 2009 to June 2010)

Table A.4 9 Total oilseed oils market projections for the EU, 2009-2020 (mio t)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Usable production	14.2	14.1	14.5	14.8	14.9	15.1	15.4	15.5	15.8	15.9	16.2	16.4
of which												
EU-15	11.9	11.7	12.1	12.4	12.5	12.7	12.8	13.0	13.2	13.3	13.6	13.7
EU-12	2.4	2.4	2.4	2.4	2.5	2.5	2.5	2.5	2.6	2.6	2.6	2.7
Consumption	16.0	16.3	16.5	16.7	17.1	17.4	17.7	17.9	18.2	18.3	18.3	18.1
of which												
EU-15	13.7	13.9	14.1	14.4	14.8	15.0	15.3	15.5	15.7	15.9	15.9	15.7
EU-12	2.3	2.3	2.3	2.3	2.4	2.4	2.4	2.4	2.4	2.5	2.4	2.4
Imports	2.4	2.6	2.6	2.5	2.7	2.9	3.2	3.3	3.4	3.4	3.2	2.8
Exports	0.7	0.6	0.6	0.6	0.6	0.5	0.5	0.5	0.5	0.5	0.6	0.6
Beginning stocks	0.8	0.8	0.7	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8
Ending stocks	0.8	0.7	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.9

Note: years refer to campaign years (e.g. 2009 refers to the marketing period of the Summer 2009 harvest, i.e. July 2009 to June 2010)

Table A.4 10 Total vegetable oils market projections for the EU, 2009-2020 (mio t)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Usable production	14.2	14.1	14.5	14.8	14.9	15.1	15.4	15.5	15.8	15.9	16.2	16.4
of which												
EU-15	11.9	11.7	12.1	12.4	12.5	12.7	12.8	13.0	13.2	13.3	13.6	13.7
EU-12	2.4	2.4	2.4	2.4	2.5	2.5	2.5	2.5	2.6	2.6	2.6	2.7
Consumption	23.5	23.9	24.2	24.6	25.2	25.7	26.3	26.7	27.1	27.4	27.4	27.3
of which												
EU-15	20.8	21.2	21.5	21.9	22.5	22.9	23.4	23.8	24.1	24.4	24.4	24.3
EU-12	2.6	2.7	2.7	2.7	2.8	2.8	2.9	2.9	2.9	3.0	3.0	3.0
of which bioenergy	8.9	9.1	9.4	9.8	10.3	10.7	11.3	11.7	12.1	12.3	12.3	12.1
Imports	9.9	10.4	10.5	10.6	11.0	11.4	11.9	12.2	12.5	12.6	12.4	12.1
Exports	0.9	0.7	0.8	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7
Beginning stocks	1.1	1.0	1.0	1.0	1.0	1.1	1.1	1.1	1.1	1.1	1.1	1.1
Ending stocks	1.0	1.0	1.0	1.0	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1

Note: years refer to campaign years (e.g. 2009 refers to the marketing period of the Summer 2009 harvest, i.e. July 2009 to June 2010)

Table A.4 11 Area under arable crops in the EU, 2009-2020 (mio ha)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Cereals	58.5	56.3	57.7	57.1	57.4	57.4	57.6	57.8	57.9	58.0	58.2	58.3
of which												
EU-15	35.5	34.3	35.1	34.8	34.9	34.9	35.0	35.1	35.2	35.2	35.3	35.4
EU-12	23.1	22.0	22.5	22.4	22.5	22.5	22.6	22.6	22.7	22.8	22.8	22.9
Soft wheat	22.9	23.0	23.8	23.3	23.4	23.4	23.5	23.7	23.7	23.8	23.9	24.0
Durum wheat	2.8	2.9	2.9	2.9	2.9	2.8	2.8	2.8	2.8	2.8	2.8	2.8
Barley	13.9	12.4	12.8	12.8	12.8	12.8	12.8	12.8	12.7	12.7	12.7	12.7
Maize	8.4	8.1	8.2	8.2	8.4	8.5	8.6	8.7	8.8	9.0	9.1	9.2
Rye	2.8	2.6	2.6	2.6	2.6	2.6	2.6	2.6	2.5	2.5	2.5	2.5
Other cereals	7.7	7.3	7.4	7.4	7.3	7.3	7.3	7.2	7.2	7.2	7.2	7.1
Oilseeds	10.8	10.9	10.8	10.9	10.9	11.0	11.0	11.0	11.0	11.0	11.1	11.1
of which												
EU-15	6.0	5.9	5.9	6.0	5.9	6.0	6.0	6.0	6.0	6.0	6.0	6.0
EU-12	4.8	5.0	4.9	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0
Rapeseed	6.5	6.9	6.9	7.0	7.0	7.1	7.1	7.1	7.2	7.2	7.3	7.3
Sunseed	3.9	3.7	3.6	3.6	3.6	3.6	3.5	3.5	3.5	3.4	3.4	3.4
Soyabeans	0.3	0.4	0.3	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.4
Sugar beet	1.6	1.6	1.5	1.6	1.7	1.7	1.7	1.8	1.7	1.8	1.7	1.8
Protein crops	0.9	1.1	1.1	1.1	1.1	1.0	1.0	1.0	1.0	1.0	1.0	1.0
Total selected arable crops	71.9	70.0	71.1	70.8	71.0	71.1	71.3	71.5	71.6	71.8	72.0	72.1
Total utilized agricultural area	188.8	188.3	187.7	187.2	186.6	186.1	185.5	185.0	184.4	183.9	183.3	182.8

Note: years refer to campaign years (e.g. 2009 refers to the marketing period of the Summer 2009 harvest, i.e. July 2009 to June 2010)

Table A.4 12 Beef and veal market projections for the EU, 2009–2020 ('000 t cwe)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Gross Indigenous Production	7 995	7 954	7 739	7 589	7 681	7 798	7 688	7 514	7 455	7 471	7 451	7 430
of which EU15	7 149	7 122	6 946	6 815	6 894	6 996	6 910	6 767	6 720	6 737	6 719	6 700
of which EU12	847	832	793	775	787	801	778	746	735	734	732	730
Imports of live animals	1	0	0	0	0	0	0	0	0	0	0	0
Exports of live animals	61	89	88	84	80	77	75	73	71	69	66	64
Net Production	7 936	7 865	7 651	7 506	7 601	7 721	7 613	7 441	7 385	7 403	7 385	7 366
Imports (meat)	428	430	496	509	545	552	563	635	640	623	616	619
Exports (meat)	124	138	123	114	116	128	106	95	91	88	84	79
Net trade	-304	-293	-373	-395	-429	-424	-457	-540	-549	-535	-532	-540
Consumption	8 240	8 139	8 079	7 959	8 012	8 063	8 017	7 950	7 915	7 921	7 913	7 904
of which EU15	7 657	7 558	7 521	7 402	7 442	7 486	7 444	7 382	7 347	7 352	7 343	7 331
of which EU12	583	582	558	557	570	577	573	568	568	569	570	572
per capita consumption (kg)	16.55	16.33	16.00	15.70	15.90	16.08	15.89	15.67	15.53	15.51	15.43	15.38
of which EU15	19.42	19.07	18.88	18.50	18.52	18.55	18.37	18.16	18.01	17.96	17.88	17.80
of which EU12	5.64	5.63	5.41	5.40	5.53	5.61	5.57	5.52	5.53	5.55	5.57	5.60

Table A.4 13 Pig meat market projections for the EU, 2009–2020 ('000 t cwe)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Gross Indigenous Production	22 186	22 333	21 804	22 610	23 082	23 092	22 914	23 111	23 484	23 527	23 482	23 738
of which EU15	18 836	18 976	18 586	19 263	19 697	19 759	19 664	19 846	20 176	20 248	20 249	20 474
of which EU12	3 350	3 356	3 218	3 346	3 385	3 333	3 251	3 264	3 308	3 279	3 233	3 264
Imports of live animals	0	1	1	0	0	0	0	0	0	0	0	0
Exports of live animals	120	79	81	67	67	67	67	67	67	66	66	66
Net Production	22 066	22 255	21 724	22 543	23 016	23 025	22 848	23 044	23 417	23 461	23 416	23 672
Imports (meat)	39	37	36	42	44	41	41	41	41	42	41	41
Exports (meat)	1 538	1 657	1 594	1 564	1 501	1 408	1 325	1 273	1 250	1 213	1 194	1 185
Net trade	1500	1620	1558	1522	1458	1367	1284	1231	1209	1171	1153	1144
Consumption	20 566	20 420	20 166	20 866	21 304	21 309	21 368	21 632	21 997	22 024	22 021	22 247
of which EU15	16 299	16 192	15 990	16 636	17 032	17 051	17 093	17 343	17 666	17 692	17 691	17 896
of which EU12	4 267	4 228	4 176	4 230	4 273	4 258	4 275	4 289	4 331	4 332	4 330	4 351
per capita consumption (kg)	41.32	40.87	40.21	41.46	42.19	42.07	42.06	42.47	43.07	43.02	42.92	43.27
of which EU15	41.33	40.85	40.14	41.57	42.38	42.25	42.19	42.65	43.29	43.22	43.08	43.45
of which EU12	41.29	40.94	40.48	41.03	41.47	41.36	41.56	41.74	42.18	42.25	42.29	42.56

Table A.4 14 Poultry meat market projections for the EU, 2009–2020 ('000 t cwe)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Gross Indigenous Production	11 663	11 618	11 918	12 000	12 083	12 129	12 196	12 272	12 371	12 410	12 466	12 491
of which EU15	8 939	8 912	9 141	9 212	9 274	9 307	9 355	9 411	9 489	9 516	9 583	9 599
of which EU12	2 724	2 706	2 777	2 788	2 810	2 822	2 841	2 861	2 882	2 894	2 883	2 891
Imports of live animals	0	1	1	1	1	1	1	1	1	1	1	1
Exports of live animals	7	7	8	8	8	8	8	8	7	7	7	7
Net Production	11 657	11 611	11 911	11 994	12 076	12 122	12 189	12 265	12 364	12 404	12 460	12 484
Imports (meat)	849	814	807	800	816	809	830	845	857	871	881	892
Exports (meat)	940	882	922	930	900	902	840	810	779	758	757	726
Net trade	91	68	116	129	84	93	11	-35	-78	-113	-124	-166
Consumption	11 572	11 551	11 802	11 864	12 003	12 054	12 223	12 354	12 494	12 585	12 661	12 742
of which EU15	8 896	8 888	9 089	9 133	9 256	9 298	9 454	9 576	9 702	9 784	9 851	9 925
of which EU12	2 677	2 663	2 714	2 732	2 747	2 756	2 768	2 778	2 792	2 801	2 810	2 817
per capita consumption (kg)	23.25	23.12	23.53	23.58	23.77	23.80	24.06	24.25	24.46	24.58	24.68	24.78
of which EU15	22.56	22.42	22.82	22.82	23.03	23.04	23.34	23.55	23.78	23.90	23.99	24.10
of which EU12	25.90	25.79	26.30	26.50	26.66	26.77	26.91	27.04	27.20	27.32	27.44	27.56

Table A.4 15 Sheep and goat meat market projections for the EU, 2009–2020 ('000 t cwe)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Gross Indigenous Production	878	854	844	824	811	817	803	795	793	784	784	776
of which EU15	791	771	762	742	732	737	724	717	716	707	707	699
of which EU12	87	82	82	82	80	80	79	78	78	77	77	77
Imports of live animals	0	0	0	0	0	0	0	0	0	0	0	0
Exports of live animals	4	7	13	12	11	11	12	11	12	12	12	12
Net Production	874	847	831	812	800	805	791	784	781	772	772	764
Imports (meat)	271	268	262	266	265	265	260	271	262	262	255	255
Exports (meat)	8	11	17	16	16	15	16	15	16	16	16	16
Net trade	-263	-257	-245	-251	-249	-250	-244	-256	-246	-246	-238	-238
Consumption	1 137	1 104	1 076	1 062	1 051	1 053	1 036	1 040	1 028	1 019	1 011	1 004
of which EU15	1 057	1 026	998	983	975	977	960	965	953	946	938	931
of which EU12	80	79	78	78	76	77	75	75	74	73	73	73
per capita consumption (kg)	2.28	2.21	2.15	2.11	2.08	2.08	2.04	2.04	2.01	1.99	1.97	1.95
of which EU15	2.68	2.59	2.50	2.46	2.43	2.42	2.37	2.37	2.34	2.31	2.28	2.26
of which EU12	0.78	0.76	0.76	0.76	0.74	0.75	0.73	0.73	0.72	0.72	0.72	0.71

Table A.4 16 Aggregate meat market projections for the EU, 2009–2020 ('000 t cwe)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Gross Indigenous Production	42 722	42 758	42 305	43 023	43 658	43 836	43 601	43 691	44 103	44 192	44 183	44 435
of which EU15	35 715	35 782	35 435	36 032	36 596	36 799	36 653	36 741	37 100	37 208	37 258	37 473
of which EU12	7 007	6 977	6 870	6 991	7 061	7 037	6 948	6 950	7 003	6 983	6 925	6 963
Imports of live animals	2	2	2	1	1	1	1	1	1	1	1	1
Exports of live animals	191	182	189	170	166	163	161	158	157	154	152	150
Net Production	42 533	42 578	42 118	42 854	43 493	43 674	43 441	43 534	43 947	44 039	44 032	44 287
Imports (meat)	1 586	1 549	1 600	1 617	1 669	1 668	1 693	1 792	1 800	1 798	1 793	1 807
Exports (meat)	2 610	2 687	2 656	2 623	2 533	2 454	2 288	2 194	2 136	2 075	2 051	2 006
Net trade	1025	1138	1055	1006	864	786	594	401	336	277	258	199
Consumption	41 515	41 214	41 124	41 751	42 371	42 480	42 643	42 976	43 433	43 549	43 606	43 896
of which EU15	33 909	33 663	33 597	34 154	34 705	34 812	34 951	35 266	35 668	35 774	35 822	36 083
of which EU12	7 607	7 551	7 527	7 597	7 666	7 668	7 692	7 710	7 765	7 776	7 784	7 813
per capita consumption (kg)	83.41	82.52	81.89	82.85	83.95	84.03	84.05	84.43	85.08	85.10	85.00	85.39
of which EU15	85.98	84.92	84.35	85.35	86.35	86.26	86.27	86.73	87.41	87.38	87.23	87.61
of which EU12	73.60	73.13	72.95	73.69	74.41	74.49	74.78	75.03	75.64	75.84	76.02	76.43
of which Beef and Veal meat	16.55	16.33	16.00	15.70	15.90	16.08	15.89	15.67	15.53	15.51	15.43	15.38
of which Sheep and Goat meat	2.28	2.21	2.15	2.11	2.08	2.08	2.04	2.04	2.01	1.99	1.97	1.95
of which Pig meat	41.32	40.87	40.21	41.46	42.19	42.07	42.06	42.47	43.07	43.02	42.92	43.27
of which Poultry meat	23.25	23.12	23.53	23.58	23.77	23.80	24.06	24.25	24.46	24.58	24.68	24.78

Table A.4 17 Milk production, deliveries and dairy herd in the EU, 2009–2020

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Dairy cows (mio heads)	23.7	23.7	23.5	23.4	23.2	22.9	22.8	22.6	22.5	22.3	22.2	22.0
of which EU15	17.9	18.0	17.9	17.8	17.7	17.6	17.5	17.4	17.4	17.4	17.3	17.2
of which EU12	5.8	5.7	5.6	5.6	5.5	5.3	5.3	5.2	5.1	5.0	4.9	4.8
Milk yield (kg/dairy cow)	6,256	6,283	6,391	6,443	6,514	6,593	6,666	6,740	6,776	6,839	6,915	6,995
of which EU15	6,738	6,773	6,883	6,930	6,987	7,054	7,134	7,199	7,209	7,256	7,318	7,387
of which EU12	4,780	4,742	4,831	4,885	4,980	5,074	5,106	5,185	5,286	5,387	5,493	5,599
Milk production (mio t)	148.5	148.6	150.3	150.5	150.8	151.0	151.8	152.3	152.5	152.7	153.2	153.8
of which EU15	120.6	121.6	123.1	123.3	123.7	123.9	125.0	125.6	125.8	125.9	126.3	126.8
of which EU12	27.9	27.1	27.2	27.2	27.1	27.1	26.8	26.7	26.8	26.8	26.9	27.0
Delivered to dairies (mio t)	133.6	133.9	135.7	136.0	136.4	136.7	137.6	138.1	138.4	138.7	139.3	139.9
of which EU15	115.3	116.4	118.0	118.2	118.6	118.9	120.0	120.5	120.7	120.9	121.3	121.8
of which EU12	18.3	17.5	17.7	17.8	17.8	17.8	17.6	17.6	17.7	17.8	18.0	18.1
On-farm use and direct sales (mio)	14.9	14.7	14.6	14.5	14.4	14.3	14.3	14.2	14.1	14.0	13.9	13.9
of which EU15	5.3	5.2	5.1	5.1	5.1	5.1	5.0	5.0	5.0	5.0	5.0	5.0
of which EU12	9.6	9.5	9.5	9.4	9.3	9.3	9.2	9.1	9.1	9.0	8.9	8.9
Delivery ratio (in %)	89.9	90.1	90.3	90.4	90.4	90.5	90.6	90.7	90.8	90.8	90.9	91.0
of which EU15	95.6	95.7	95.9	95.9	95.9	95.9	96.0	96.0	96.0	96.0	96.0	96.1
of which EU12	65.5	64.7	65.2	65.3	65.6	65.7	65.7	65.8	66.1	66.5	66.8	67.2
Fat content of milk (in %)	4.03	4.04	4.04	4.04	4.04	4.04	4.04	4.03	4.03	4.03	4.03	4.03
Non-fat solid content of milk (in %)	9.28	9.29	9.29	9.29	9.29	9.29	9.29	9.29	9.29	9.29	9.29	9.29

Table A.4 18 Cheese market projections for the EU, 2009–2020 ('000 t)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Production	8 721	8 828	8 971	9 024	9 096	9 168	9 274	9 376	9 438	9 495	9 558	9 625
of which EU15	7 583	7 704	7 807	7 837	7 889	7 947	8 026	8 101	8 141	8 175	8 214	8 258
of which EU12	1 138	1 125	1 163	1 188	1 207	1 221	1 248	1 275	1 297	1 320	1 344	1 367
Imports	84	78	71	82	71	68	73	66	66	72	75	79
Exports	577	536	604	611	593	585	603	608	597	590	588	593
Consumption	8 228	8 371	8 438	8 495	8 574	8 651	8 744	8 834	8 908	8 977	9 046	9 111
of which EU15	7 133	7 240	7 286	7 327	7 383	7 438	7 505	7 567	7 619	7 666	7 712	7 756
of which EU12	1 095	1 131	1 153	1 169	1 191	1 213	1 239	1 267	1 289	1 311	1 333	1 355
per capita consumption (kg)	16.53	16.75	16.83	16.88	16.98	17.08	17.21	17.34	17.44	17.54	17.63	17.72
of which EU15	18.09	18.26	18.29	18.31	18.37	18.43	18.52	18.61	18.67	18.73	18.78	18.83
of which EU12	10.60	10.95	11.17	11.33	11.56	11.78	12.05	12.33	12.55	12.78	13.02	13.25

Table A.4 19 Butter market projections for the EU, 2009–2020 ('000 t)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Production	2 083	2 013	2 059	2 060	2 057	2 047	2 070	2 073	2 060	2 060	2 064	2 081
of which EU15	1 849	1 801	1 845	1 850	1 847	1 838	1 862	1 865	1 854	1 853	1 857	1 874
of which EU12	234	212	214	210	210	209	208	207	206	206	207	207
Imports	62	37	34	35	33	34	36	36	37	37	37	38
Exports	148	146	130	113	82	88	103	107	100	96	95	97
Consumption	2 001	1 979	1 983	1 990	1 991	1 989	1 995	1 998	2 002	2 002	2 005	2 009
of which EU15	1 803	1 788	1 793	1 801	1 801	1 800	1 805	1 808	1 812	1 812	1 815	1 818
of which EU12	199	191	189	190	190	189	190	190	190	190	191	191
per capita consumption (kg)	4.02	3.96	3.95	3.96	3.94	3.93	3.93	3.92	3.92	3.91	3.91	3.91
of which EU15	4.57	4.51	4.50	4.50	4.48	4.46	4.46	4.45	4.44	4.43	4.42	4.41
of which EU12	1.92	1.85	1.83	1.84	1.84	1.84	1.84	1.85	1.85	1.86	1.86	1.87
Ending Stocks	115	40	20	12	28	32	40	44	39	38	38	50
of which private	38	38	20	12	28	32	40	44	39	38	38	50
of which intervention	77	2	0	0	0	0	0	0	0	0	0	0

Table A.4 20 SMP market projections for the EU, 2009–2020 ('000 t)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Production	976	883	862	809	785	765	799	788	772	757	749	746
of which EU15	813	763	749	699	680	667	704	697	685	674	670	669
of which EU12	162	120	114	110	105	99	95	91	87	83	80	77
Imports	6	3	3	3	3	3	3	3	3	3	3	3
Exports	230	271	266	230	204	190	187	186	171	168	168	168
Consumption	647	647	646	641	632	622	625	614	604	593	586	578
of which EU15	571	571	570	566	556	546	549	539	528	518	511	504
of which EU12	75	76	76	76	76	76	76	76	75	75	75	75
Ending Stocks	278	246	199	140	93	49	39	31	32	31	29	31
of which private	20	60	60	61	74	49	39	31	32	31	29	31
of which intervention	258	186	139	79	19	0	0	0	0	0	0	0

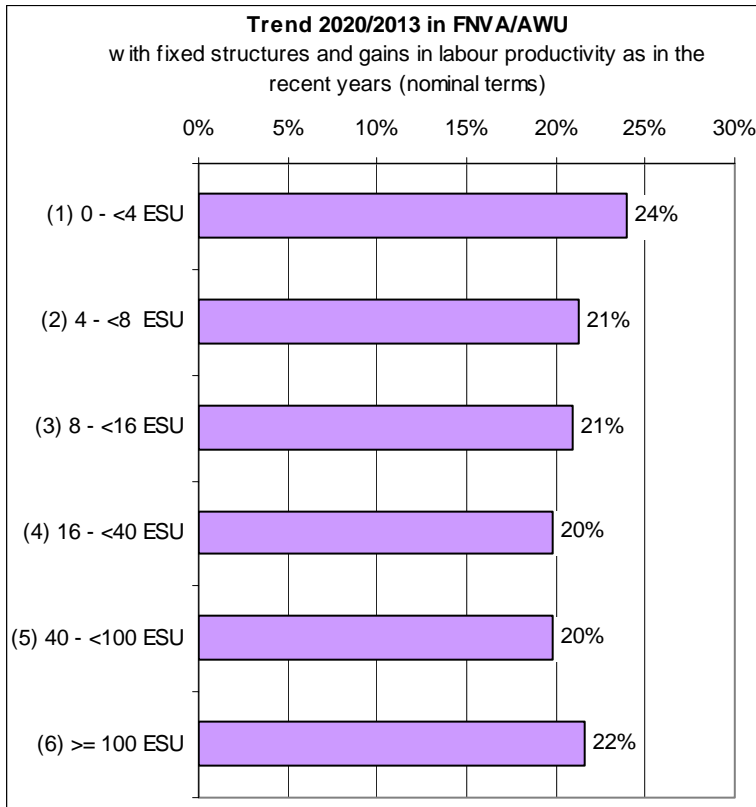
Table A.4 21 WMP market projections for the EU, 2009–2020 ('000 t)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Production	790	784	789	807	804	796	799	804	801	793	796	787
of which EU15	736	733	738	752	750	742	746	750	747	739	741	733
of which EU12	54	51	51	55	54	53	54	54	55	54	55	54
Imports	1	2	2	1	1	1	1	1	1	1	1	1
Exports	456	451	445	455	452	446	449	451	447	441	445	438
Consumption	335	335	345	353	353	350	352	355	356	354	353	352
of which EU15	299	301	309	316	316	313	316	318	320	318	316	315
of which EU12	36	34	37	37	37	37	37	37	37	37	37	37

Table A.4 22 Biofuels market projections for the EU, 2009–2020 (billion litres)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Usable production	15.3	15.8	16.4	16.9	18.2	20.0	22.5	24.9	26.9	29.1	31.7	35.1
of which												
Ethanol	5.7	6.1	6.3	6.4	7.2	8.5	10.3	12.0	13.4	14.8	16.3	18.0
of which 2nd generat	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.4	0.8	1.6	3.0
Biodiesel	9.6	9.7	10.1	10.5	11.1	11.5	12.1	12.8	13.5	14.3	15.4	17.1
of which 2nd generat	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.5	1.1	2.1	4.0
Consumption	17.1	18.8	20.1	22.8	25.1	28.2	31.6	34.7	37.3	39.9	41.7	42.7
Ethanol	7.1	7.8	9.1	11.1	12.5	13.8	15.7	18.0	19.9	21.5	22.2	21.8
Biodiesel	10.0	11.0	11.0	11.7	12.6	14.5	15.9	16.7	17.5	18.3	19.5	20.9
other use of ethanol	2.4	2.4	2.4	2.4	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5
Energy share	2.3	3.1	3.4	4.0	4.7	5.5	6.2	6.8	7.3	7.8	8.2	8.5
Ethanol	2.3	2.6	3.3	4.3	5.0	5.6	6.6	7.8	8.7	9.6	10.0	9.8
Biodiesel	4.1	4.4	4.3	4.6	4.9	5.5	6.0	6.3	6.6	6.9	7.3	7.9
Net trade	-1.9	-3.0	-3.6	-5.9	-6.9	-8.2	-9.1	-9.9	-10.4	-10.8	-9.9	-7.6
Ethanol	-1.4	-1.7	-2.8	-4.7	-5.3	-5.2	-5.3	-6.0	-6.5	-6.8	-5.9	-3.8
Biodiesel	-0.5	-1.3	-0.9	-1.1	-1.6	-3.0	-3.8	-3.9	-3.9	-4.0	-4.0	-3.8
Producer Price	51.8	61.9	65.5	61.8	58.9	56.9	54.5	52.9	52.4	52.5	52.0	48.8
Ethanol	51.8	61.9	65.5	61.8	58.9	56.9	54.5	52.9	52.4	52.5	52.0	48.8
Biodiesel	80.0	86.6	97.3	101.2	102.6	106.1	111.1	113.6	116.7	116.7	118.1	119.4

Graph 51 Trend in income by economic size



Source: EU FADN DG AGRI