

# Thirty years of agriculture in Europe

## Holdings with grazing livestock have followed different paths

Claude VIDAL

Grazing livestock make up two thirds of all European livestock. In many regions, however, they compete with granivores. What the various species of grazing livestock have in common is that they are concentrated on specialist holdings (9 LSU<sup>1</sup> out of 10). There are, however, a number of differences. The geographical distribution is different: dairy cows in the North, suckler cows, sheep and goats in the South. The size of the herd varies greatly depending on the species: 27 goats on average per livestock holding, but 184 sheep. The economic size of holdings depends on their specialisations: 56 ESU<sup>2</sup> for farmtype (FT) "specialist dairy farming", but only 9 ESUs for "sheep, goats and other grazing livestock". These diverse situations are partly explained by the economic choices made by farmers over the course of 30 years. In the case of the rearers of herbivores, these choices were heavily influenced by the introduction of milk quotas in 1984.

### Grazing livestock makes up two thirds of the European livestock

In 2000 the total number of European livestock was 118 million LSU (**Box 1**). Grazing livestock, (ruminants and equidae), at 72 million LSU, made up nearly two thirds (61%). Cattle alone accounted for half of the livestock (59 million LSU). Pigs, at 30 million LSU, represented a quarter (**Figure 1**). Equidae are considered separately (**Box 2**).

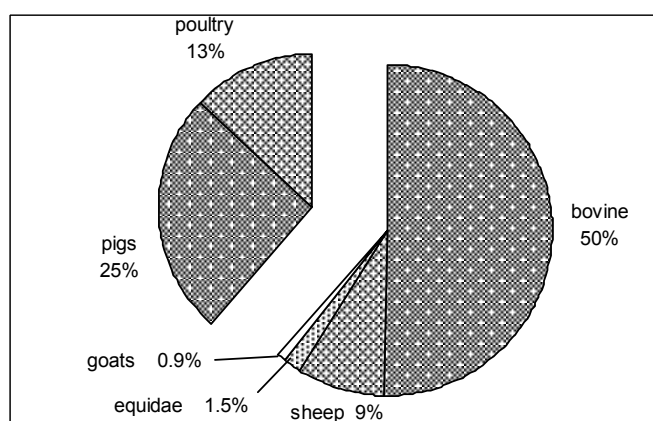


Figure 1: Breakdown of the EU-15<sup>3</sup> livestock (in LSU) in 2000

<sup>1</sup> LSU: Livestock Unit (see Box 1)

<sup>2</sup> ESU: European Size Unit. This is the reference unit used at European level to express the holding's standard gross margin.

<sup>3</sup> EU-9 means the Europe of Nine [B, DK, D, F, IRL, I, L, NL, UK], EU-12 means [EU-9, E, EL, P], and EU-15 means [EU-12, A, FIN, S]. In order to avoid having to analyse variations due to German reunification, throughout this article, D\*, EU-9\*, EU-12\* etc. mean that the former GDR is not included.

## Statistics in focus

### AGRICULTURE AND FISHERIES

THEME 5 – 25/2002

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In EU-9\*, there has been practically no change in the overall number of livestock (-1%) since 1975, remaining at around 90 million LSU. This overall level of stability masks contrasting situations and trends among the different species of animal (**Figure 2**). The grazing livestock declined from 64.1 million LSU to 55.9 million LSU in EU-9\* between 1980 and 2000 (-13%). In EU-12\*, the decline between 1990 and 2000 was 6% (from 70.8 million LSU to 66.3 million LSU). The granivore livestock (pigs and poultry),

which is mainly reared indoors, increased in EU-9\* by 17%, from 27.5 million LSU to 32.3 million LSU between 1980 and 2000. In EU-12\*, between 1990 and 2000, the increase was the same (from 35.9 million LSU to 41.9 million LSU). In 2000, pigs alone represented more than 23% of LSU in EU-9\*, compared with 20% twenty years earlier. In percentage terms, poultry increased from 10% to 13% over the same period.

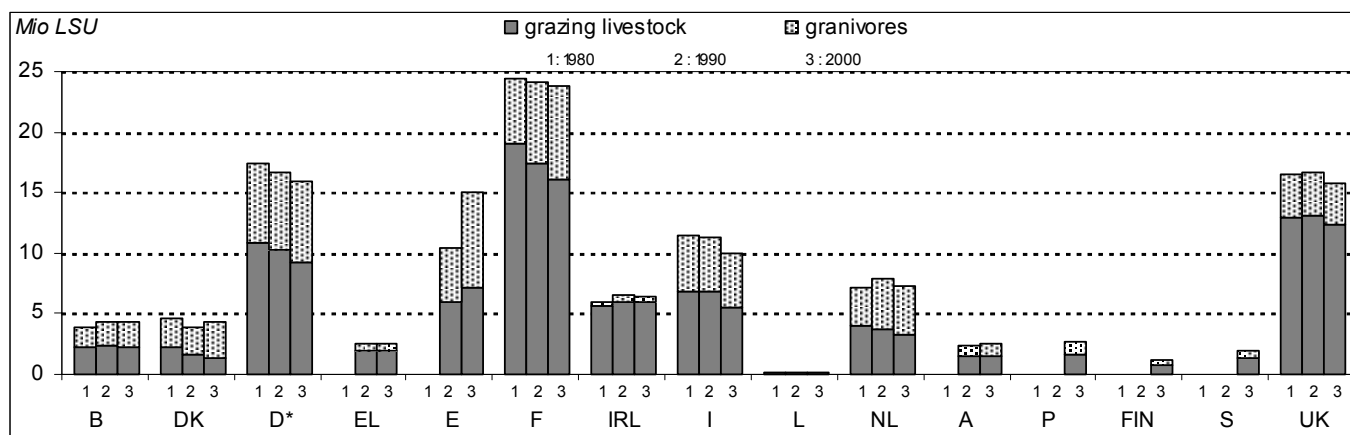


Figure 2: Trend in the structure of the livestock (grazing livestock/granivores)

### Box 1: Livestock units (LSU)

A Livestock Unit (LSU) represents the quantity of feed energy needed by a reference animal (by convention, a dairy cow with an annual milk yield of 3,000 kg) to cover its maintenance and production requirements. The LSU is thus a reference unit common to the various categories of animal and relates to their feed requirements. It can also be used as a common unit for measuring livestock numbers, as long as the limits of this theoretical unit are taken into account when the data are interpreted.

The following coefficients of equivalence are used in this issue of *Statistics in Focus* (**Table 1**).

However, it should be noted that Council Regulation No. 1254/99 on the common organisation of the market in beef and veal provides a different definition of LSU (**Table 2**). As a result, the load thresholds in the above-mentioned Regulation (suckler cow premium if the forage area load is under two LSU/ha, extensification premium if the load is under 1.4 LSU/ha) differ from those calculated on the basis of the Farm Structure Survey (FSS).

Equidae		0.8	
Bovine animals	Under one year old	0.4	
	One year or over but under two years	Male	0.7
		Female	0.7
	Two years old and over	Male	1
		Heifers	0.8
		Dairy cows	1
Other cows	0.8		
Sheep	All ages	0.1	
Goats	All ages	0.1	
Pigs	Piglets weighing under 20 kg per 100 head	2.7	
	Breeding sows weighing over 50 kg	0.5	
	Other pigs	0.3	
Poultry	Broilers per 100 head	0.7	
	Laying hens per 100 head	1.4	
	Other poultry per 100 head	3	
Rabbits	Rabbits, breeding females per 100 head	2	

Table 1: Coefficients of equivalence in EU statistics

	LSU
Male and female bovine animals over 24 months old, suckler cows, dairy cows	1
Male and female bovine animals between 6 and 24 months old	0.6
Sheep	0.15
Goats	0.15

Table 2: Coefficients of equivalence under Regulation No 1254/99

## Box 2 : Equidae

Equidae are non-ruminant grazing livestock. As their function has become more recreational than productive, they represent a special case for separate analysis, even though their number is low compared with other grazing livestock. In 2000, 536,000 holdings (representing 17% of livestock holdings) had equidae. They account for 2.2 million head (1.8 million LSU), representing 1.5% of the European herd. The average number of head per holding is 4.2.

In 2000, nearly half of European equidae (47%) were on holdings "specialising in sheep, goats and other grazing livestock" and three quarters were in holdings "specialising in grazing livestock".

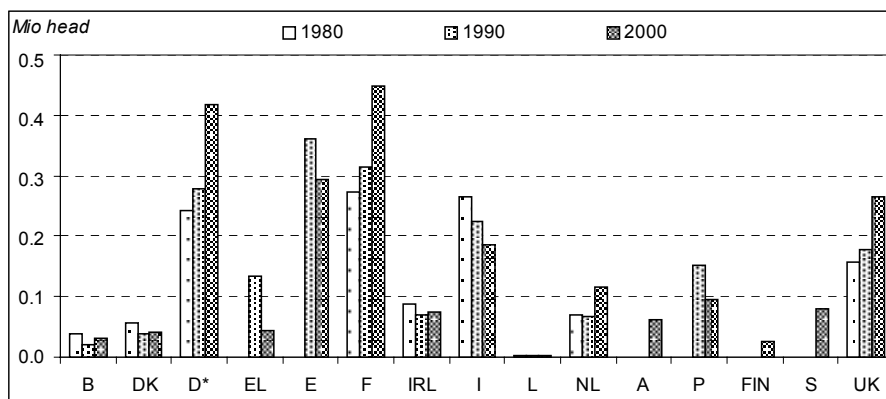


Figure 3: Trend in the number of equidae

The trend in the number of equidae is linked to the individual national situations. Belgium, Denmark, France, Ireland, Italy and the Netherlands saw their number of equidae decline up to 1987, in some cases quite sharply (-28% for France, for example). Since then they have seen a fairly sharp increase (**Figure 3**). The disappearance of draught animals during the first period (even if these horses were no longer used as such) was followed by the development of horse breeding for recreational and racing purposes in the second period.

The Mediterranean countries (E, EL, P) have seen a constant decline since they joined the EU: -87% for Greece between 1983 and 2000, -31% and -36% for Spain and Portugal between 1987 and 2000.

## Fewer dairy cows and more sheep

Changes within the ruminant livestock herd reveal a strong trend over the whole period (**Figures 4 and 5**), and they are similar for EU-9\* and EU-12\*.

Between 1975 and 1983, the number of dairy cows remained stable at around 25 million LSU in EU-9\*. The introduction of milk quotas in 1984 and technical progress led to a sharp reduction in the livestock numbers between 1983 and 1990 (-18%). Since 1990, the herd has continued to decline noticeably (by 2% per annum on average). This decline is mainly due to the increase in productivity of the dairy livestock and the successive reduction in quotas. Other bovine animals (calves, bulls, heifers to renew the milk livestock, etc.) also saw a decline, albeit less marked (-18% over the whole period 1975-2000).

The forage area released by dairy cows was used to the benefit of other cattle<sup>4</sup>. Their numbers saw a sharp increase (+46% between 1975 and 2000), particularly between 1987 and 1993 (+37%). This latter period was when certain dairy farms moved over from dairy cows to suckler cows. Since 1993 the increase has not been as strong but it is still in evidence (1% per annum on average).

EU-9\* has also seen a considerable increase in the sheep population (+52% between 1975 and 1990) and particularly between 1985 and 1987 (+6% over a two-year period). Since 1990, the sheep population has seen a slight decline (-10% between 1990 and 2000). In the case of goats, increases have been less steady but have followed the same trend (+26% over the 25 year period).

<sup>4</sup> These are cows over two years old which are not intended for milk production but for meat production. They are also known as suckler cows as they suckle the calves to which they have given birth.

In EU-12\*, the same overall trends have emerged. Dairy cow numbers have seen a constant decline (-20% between 1990 and 2000) as have the numbers of other bovine animals (-7% over the same period). "Other cows" have seen an increase of 28% whereas the situation for sheep has remained relatively stable since 1990 (-3%). In Spain, sheep stocks increased by 20% over this period.

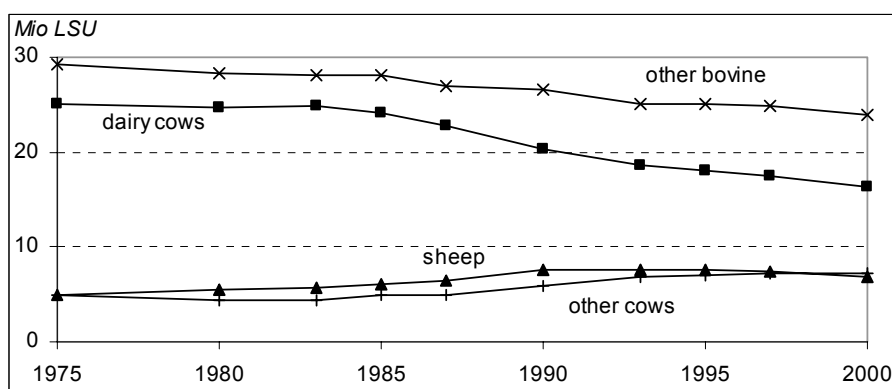


Figure 4: Trend in the various categories of ruminant in EU-9\* (in million LSU)<sup>5</sup>

This change in the breakdown of species of ruminant was accompanied by a drastic restructuring to raise productivity: an increase in the number of highly productive breeds, a reduction in livestock numbers and the risk of certain local less profitable breeds disappearing (Box 3).

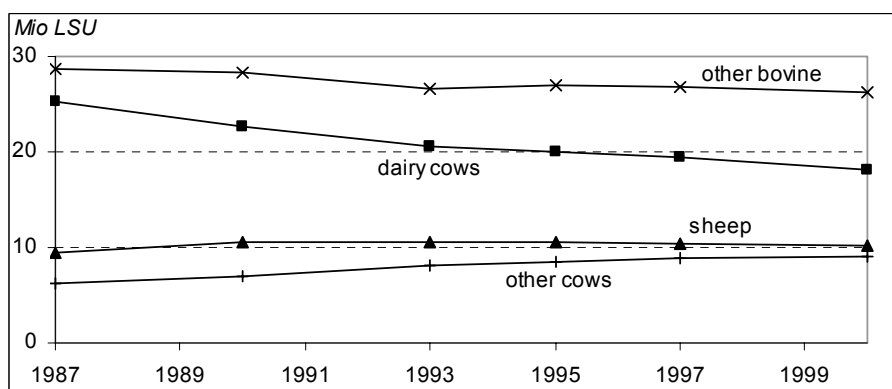


Figure 5: Trend in the various categories of ruminant in EU-12\* (in million LSU)<sup>5</sup>

### Box 3: Shrinking genetic diversity

The change in the breakdown of the various types of animals was accompanied by a reduction in the number of breeds reared. For example, the Holstein-Friesian breed has become the reference cow in terms of milk production throughout Europe, at the expense of local breeds, which, though less productive, are hardier and better adapted to local conditions (Tables 3 and 4). This reduction in genetic diversity is a potential threat in the event of epidemics, for example. This phenomenon is further intensified by the use of artificial insemination, whereby a single bull can sire several thousand offspring.

As part of agri-environmental programmes, 13 Member States have encouraged measures to promote the rearing of breeds which are under threat because they offer little attraction in economic terms. Moreover, increasing attention is being paid to the significance of local breeds (whether they are under threat or not) in preserving the landscape.

Country	Cattle	Sheep	Goats
Austria	93	79	-
Finland	67	97	100
Germany	90	-	-
Greece	98	68	100
Italy	94	89	-
Netherland	91	-	-
Sweden	92	-	95

Table 3: Each of the three main breeds as a percentage of the total number of animals in 1988 (Source: OECD)

	Cattle	Sheep	Goats	Equidae
Breeds at risk	12	14	3	12
Total number of breeds	77	41	16	103
Percentage	16%	34%	19%	12%

Table 4: Estimate of the number of breeds at risk in Germany in 1997 (Source: OECD)

<sup>5</sup> As the number of LSU of goats is very small (0.2 million LSU in 2000 in EU-9\* and 1.1 million LSU in 2000 in EU-12\*), it is not included in these charts.

## Bovine animals on holdings in northern and central Europe

In 2000, half of holdings in EU-15 had livestock (3.2 million out of a total of 6.8 million). More than two out of five holdings had ruminants (some 2.6 million holdings). A quarter of holdings in the EU had bovine animals, 11% had sheep and only 5% had goats, both in EU-15 and EU-12. However, it should be noted that small ruminants were scarce in countries, which had recently joined (A, S, FIN).

This European average hides large national disparities (Figure 6). In the countries of central and

northern Europe (B, DK, D, F, L, NL, A, FIN, S), at least two out of five holdings have livestock of bovine animals, whereas less than one in five holdings has sheep or goats. The United Kingdom stands out in this group with a relatively high percentage of holdings with sheep (35%). In Ireland, one in three holdings has sheep, though bovine animal farming predominates. Nine out of ten holdings have bovine animals.

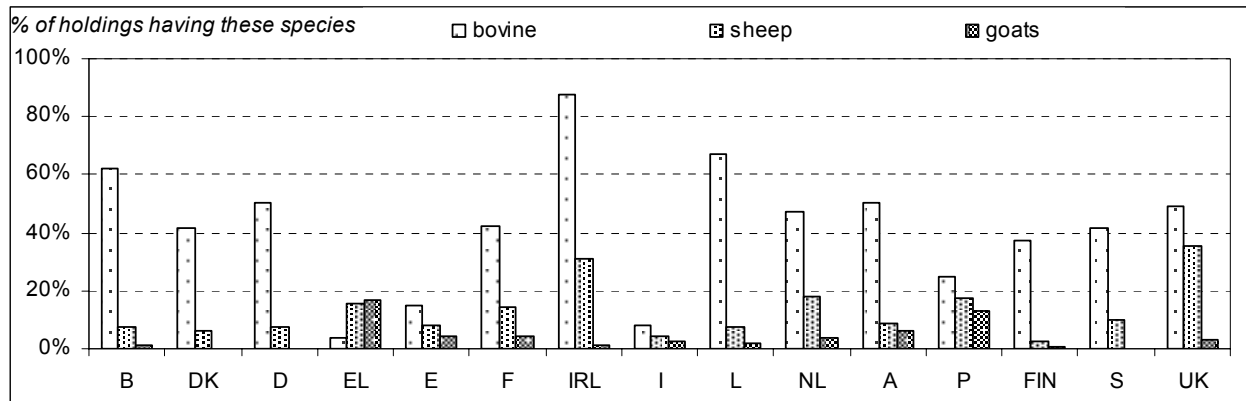


Figure 6: Percentage of holdings with these species in the individual Member States in 2000

As Italy has a great number of small holdings with no livestock farming, only one in three holdings has livestock and less than two in ten has ruminants. In Spain, nearly one holding in ten has sheep. This level rises to 17% in Portugal where 13% of holdings have goats. Greece is the only country in the European

Union where there are more holdings with sheep and goats than there are with bovine animals. This is a large difference since the levels are close to 17% for goats and 16% for sheep, whereas only 3% of Greek holdings have bovine animals.

## Twice as many LSUs per holding in 2000 than in 1980 in EU-9\*

Over the period 1980-2000, the total number of holdings fell by 34% in EU-9\* and holdings with livestock fell by 50% (Table 5). The number of holdings with ruminants fell quite sharply depending on the type of ruminant. The number of holdings with dairy cows fell drastically (-71% between 1980 and 2000).

This fall was the result of the introduction of milk quotas as well as the sharp concentration in milk production. Holdings with "other cows" fell by only 14% over the course of 20 years, with a period of stability as a result of the conversion of dairy holdings and measures taken to help beef and veal producers. The trend for holdings with sheep was the same as for holdings in general (-35% in number). The number of holdings with goats saw a sharp decline (-64%).

Thousands of holdings with...	EU-9*			EU-12*
	2000	Trend 80-2000	Trend 90-2000	Trend 90-2000
Cattle	1,028.7	-57%	-35%	-38%
Of which dairy cows	485.6	-71%	-46%	-51%
other cows	454.7	-14%	-17%	-18%
Sheep	373.7	-35%	-31%	-27%
Goats	89.3	-64%	-44%	-39%
<b>Livestock</b>	<b>1,868.0</b>	<b>-50%</b>	<b>-32%</b>	<b>-31%</b>

Table 5: Trend in the number of holdings with ruminants

In EU-9\*, the average number of LSU per livestock holding more than doubled between 1980 and 2000, increasing from 24.3 to 47.2 LSU per holding (**Table 6**). The concentration was greater for dairy cows (2.3 times more dairy cows per holding) and for goats (2.9 times more). It was less concentrated for "other cows". There were 16 "other cows" per holding in 2000 in EU-9\* compared with 8 in 1980. There was a comparable trend for sheep and goats (1.9 times more). Holdings with sheep had an average of 184 sheep in 2000. Holdings with dairy cows recorded an average of 34 per holding. Goat farming remained relatively extensive with 27 head per holding in 2000 in EU-9\*. The number of head per holding had nevertheless increased by a factor of three since 1980.

LSU/ holding	EU-9*			EU-12*
	2000	Trend 80-90	Trend 90-2000	Trend 90-2000
Bovine	46.2	40%	38%	48%
Of which dairy cows	33.7	52%	49%	64%
other cows	16.0	27%	50%	56%
Sheep	18.4	48%	30%	32%
Goats	2.7	76%	64%	64%
<b>Livestock</b>	<b>47.2</b>	<b>38%</b>	<b>41%</b>	<b>47%</b>

Table 6: Trend in the number of LSU per holding with ruminants

### Nine out of ten ruminants on holdings specialising in grazing livestock

Whatever the species involved, the vast majority of ruminants are on holdings which specialise in that type of livestock farming: 90% for bovine animals, 87% for sheep and 81% for goats (**Table 7**).

The 463,000 holdings of farm type 41, "Specialist dairy farming" account for 42% of the bovine animal livestock and 74% of dairy cows. However, they represent only 32% of holdings with bovine animals. This specialisation is very high in Denmark, the

Netherlands and Finland since holdings of FT 41 account for more than 69% of the bovine animal livestock and 85% of dairy cows.

Sheep and goats are also concentrated in specialist holdings, though FT 44, Holdings specialising in "sheep, goats and other grazing livestock" is more disparate. The 610,000 holdings of this farmtype accounted for two thirds of sheep and goats in EU-15.

	Holdings specialising in grazing livestock				Mixed livestock-cropping		Percentage of holdings specialising in grazing livestock or mixed
	Specialist dairying (41)	Specialist cattle - rearing, fattening (42)	Cattle - dairying, rearing, fattening combined (43)	Sheep, goats and other grazing livestock (44)	Mixed livestock, mainly grazing livestock (71)	Field crops - grazing livestock combined (81)	
Holdings	7%	5%	1%	9%	2%	4%	<b>27%</b>
Male and female calves	32%	27%	6%	6%	3%	14%	<b>88%</b>
Male bovine between one and two years old	22%	28%	8%	6%	3%	17%	<b>84%</b>
Female bovine between one and two years old	47%	16%	5%	5%	3%	14%	<b>90%</b>
Male bovine two years and over	20%	41%	7%	8%	2%	11%	<b>89%</b>
Heifers two years and over	40%	21%	6%	6%	3%	14%	<b>90%</b>
Dairy cows	74%	0%	5%	1%	3%	12%	<b>95%</b>
Other cows	4%	49%	5%	12%	3%	13%	<b>87%</b>
Total bovine	42%	20%	5%	6%	3%	13%	<b>90%</b>
Sheep	4%	3%	1%	67%	3%	10%	<b>87%</b>
Goats	1%	1%	0%	66%	5%	8%	<b>81%</b>
Total ruminants	<b>36%</b>	<b>17%</b>	<b>5%</b>	<b>16%</b>	<b>3%</b>	<b>13%</b>	<b>89%</b>

Table 7: Breakdown of the ruminant livestock according to the FT of holdings in 2000 (as a percentage of LSU)

### Holding specialising in grazing livestock follow different paths

Since 1975, the average Agricultural Area (AA) of holdings in EU-9\* has increased by 38% (from 14.8 to 20.5 ha). There are three distinct groups within holdings specialising in grazing livestock (**Figure 7**):

- Holdings specialising in dairying (FT 41), holdings specialising in cattle dairying, rearing and fattening combined (FT 43) and holdings specialising in field crops - grazing and livestock combined (FT 81) sharply increased their AA and their standard

gross margin (SGM). This increase has accelerated since 1990. The SGM of specialist dairying holdings increased by 29 ESU in ten years whereas between 1975 and 1990 it had increased by only 15 ESU. Likewise, in the 90s, the average AA of holdings, specialising in the combined dairying, rearing and fattening of cattle increased from 32 to 52 ha (+62%), representing an increase of twice the rate of the 15 previous years. By way of comparison, holdings specialising in cereals (FT 11) saw a threefold increase in their SGM per holding between 1975 and 2000, whereas there was a sixfold increase for specialist dairying holdings and holdings specialising in the combined dairying, rearing and fattening of cattle.

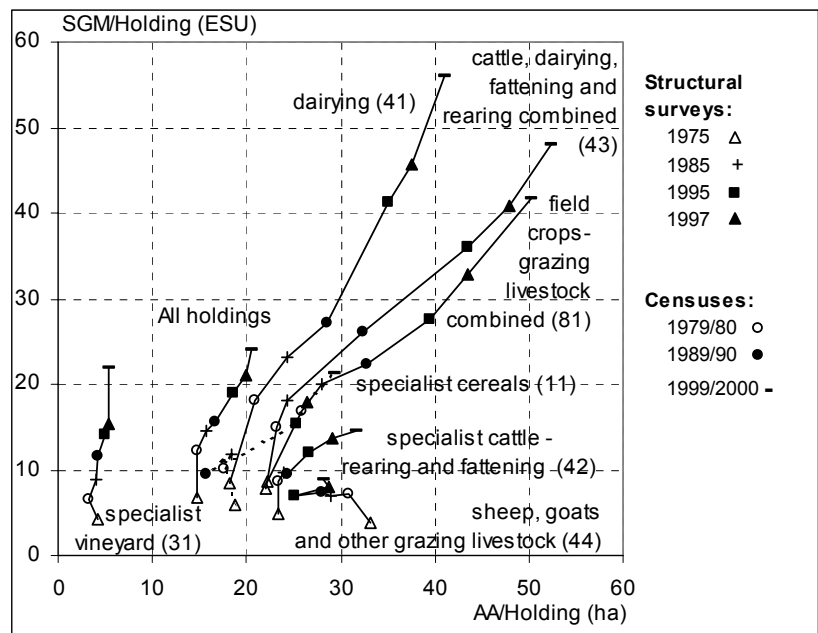


Figure 7: Part of holdings in EU-9\* according to their AA and their SGM

- Holdings specialising in cattle rearing and fattening (FT 42) saw a 35% increase in their AA and a twofold increase in their SGM per holding between 1975 and 1990, a rate of increase below the average for all holdings. In 2000, the average SGM for this type of holding was only two thirds of the average SGM for all holdings (14.5 ESU). Holdings specialising in sheep, goats and other grazing livestock (FT 44) saw a fall in their average utilised agricultural area (-15%) whereas there was a near doubling of their SGM between 1975 and 1980 followed by a period of stagnation ever since around the level of 8 ESU per holding. This drop in area is explained by the intensification of production. It is also reflected in the abandonment of underproductive grazing pasture or high mountain pasture. In 2000, holdings of this FT have the smallest average economic size: 9 ESU, which is five times less than specialist dairying holdings (FT 41).

Apart from the trend in total SGM of each of these farmtypes, the three different paths are explained by different trends in the number of holdings within the various farmtypes (Figure 8). The number of holdings of FT 41, FT 43 and FT 81 has declined steadily since 1975: -60% for FT 41, -86% for FT 43 and -74% for FT 81. The number of holdings of FT 42 decreased slightly (-6%) between 1975 and 2000.

In view of the overall decline in the number of holdings, the number of holdings of FT 42 more than doubled as a percentage of the overall livestock (5.7% in 1975 and 12.4% in 2000).

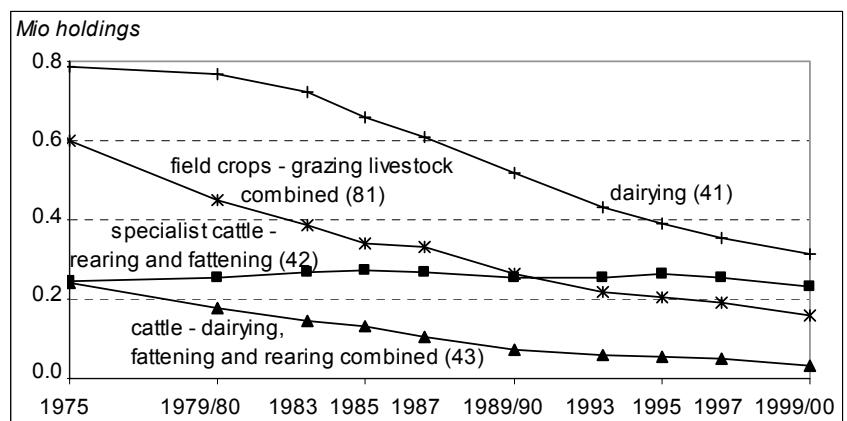


Figure 7: Trend in the number of holdings in EU-9\* according to farmtype

Lastly, the number of holdings of FT 44 increased up to 1993 and then declined. Between 1975 and 2000, 111,400 additional holdings came under the classification FT 44 (+36%). In 2000, with 423,000 holdings, FT 44 accounted for the largest percentage of holdings specialising in grazing livestock, ahead of specialist dairying holdings.

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