

Statistics

in focus

AGRICULTURE AND FISHERIES

THEME 5 – 26/2002

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A high-performance pigmeat industry with an environmental impact

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The European Union produces one in five of the world's pigs. This production comes from a substantial and highly concentrated pig population estimated at 123 million animals in 2000. Nine regions, covering 10 % of the Utilised Agricultural Area (UAA), account for half the total number and over 50% of Europe's pigs are produced by holdings with over 1,000 pigs. The potential impact of the pig population on the environment is therefore significant, although various agricultural practices are being introduced to help reduce pollution from this sector.

One in five of the world's pigs comes from the European Union.

The production of pigmeat in the EU was estimated at 17.6 million carcass equivalent tonnes in 2000, which is about one-fifth of world production. This production increased by 11 % between 1995 and 1999 despite the outbreak of swine fever in 1996-97. Following a situation of overproduction which led to a drop in prices in 1998 and 1999, production was down slightly in 2000, thus marking the end of a production cycle. In Germany, production remained stagnant until 1997, returning in 1998 to its 1991 level of 3.8 million tonnes per annum (Figure 1). Spain saw a substantial increase in production throughout this period (+55 %); in 2000, it produced close to 3 million tonnes, making it the EU's second-largest producer. In Denmark (+28 %), where pigmeat accounted for 79 % of the country's meat production in 2000, and in France (+21 %), production has also increased although it is tending now to level off. In the Netherlands, leaving aside the swine fever outbreak of 1997, the dip in production in recent years can be attributed to the political decision to reduce the pig population.

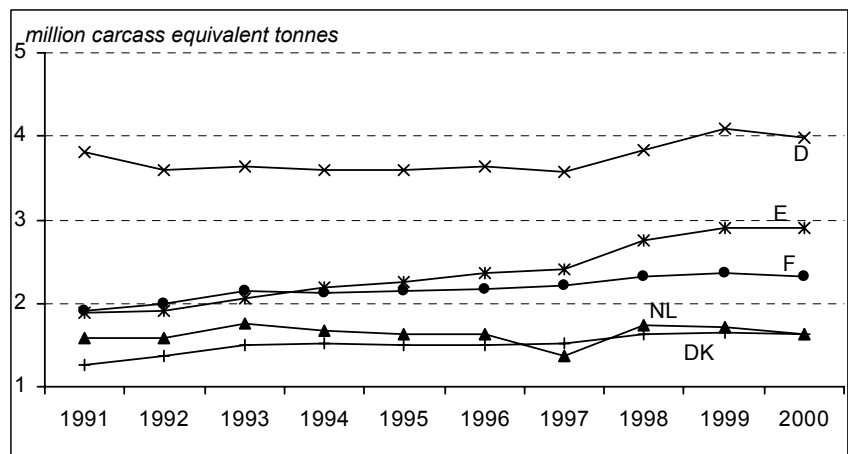


Figure 1: Pigmeat production by the main producer Member States



On average, each European ate 43 kg of pigmeat in 2000, which is 46 % of total meat consumption in the EU. Pigmeat is cheap and tops the list of meats consumed in the EU, well ahead of poultry (22 kg) and beef (19 kg). Pigmeat's relative share of total meat consumption is moderate in the United

Kingdom, which is the only Member State where it takes second place (after poultry). The consumption of pigmeat has increased significantly in recent years in the countries of southern Europe (Greece, Spain, Italy, Portugal) (**Table 1**).

	Consumption 2000		Trend 1995-2000		Self-sufficiency rate in 2000
	Kg/pers.	Proportion of all meat	Production	Consumption	
B-L	46	49 %	+ 1 %	- 2 %	225 %
DK	64	57 %	+ 9 %	0 %	489 %
D	54	60 %	+ 11 %	- 1 %	87 %
EL	33	36 %	- 4 %	+ 32 %	40 %
E	65	53 %	+ 29 %	+ 14 %	114 %
F	36	34 %	+ 8 %	+ 1 %	106 %
IRL	38	35 %	+ 7 %	0 %	166 %
I	37	40 %**	+ 10 %	+ 10 %	66 %
NL	44	52 %	0 %	- 6 %	256 %
A	61	59 %	+ 10 %	+ 7 %	99 %
P	44	42 %	+ 16 %	+ 28 %	64 %
FIN*	34	49 %	+ 9 %	+ 7 %	102 %
S	36	49 %	- 10 %	- 2 %	89 %
UK	24	29 %	- 7 %	+ 2 %	64 %
EU-15*	43	46 %	+ 9 %	+ 6 %	109 %

* 1999 and OFIVAL data

** 1999 data for horsemeat

Table 1: Production and consumption of pigmeat

Despite the high level of consumption, the Community self-sufficiency rate¹ is 109 %. In 1998, 1999 and 2000, the European Union exported 1.1, 1.5 and 2.3 million tonnes, or 6%, 8% and 13 % of its production. The Member States fall into three main groups (**Table 1, Figure 2**):

- Germany, Italy, the United Kingdom, Greece, Sweden and Portugal are not self-sufficient and obtain their supplies mainly from within the Union. In 2000, Germany, Italy and the United Kingdom imported 1 million t, 0.8 million t and 0.7 million t respectively.

- France, Spain, Austria, and Finland are generally self-sufficient.

- The Netherlands, *Belgium+Luxembourg*, Denmark and Ireland produce surpluses. Production in Denmark and the Benelux countries is mainly export-oriented. Denmark exported 86 % of its production in 2000, with almost half this total going to non-EU countries (Japan, USA, Russia, etc). The Benelux countries export two-thirds of their production, but this is mainly to the EU market which accounted for over 90 % of their exports in 1999.

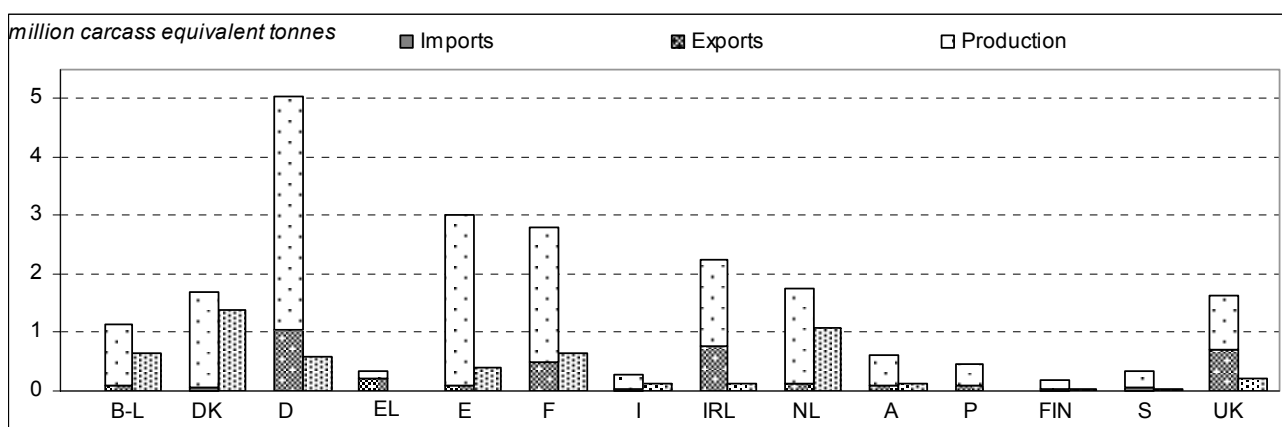


Figure 2: Production, import and export of pigmeat in 2000 (FIN: 1999 data)

¹ Self-sufficiency rate: the ratio of gross indigenous production to domestic use, i.e. 109 kg are produced for every 100 kg used

A substantial population, large holdings and specialised regions

Community pigmeat comes from a pig population which numbered 123 million animals in 2000. Piglets (less than 20 kg) make up almost one third of this total (35 million). Breeding sows, at 13 million head, account for one-tenth of the population. Eight Member States possess 90 % of the European pig

population: Germany (21 %), Spain (18 %), France (12 %), the Netherlands (11 %), Denmark (10 %), Italy (7 %), Belgium (6 %) and the United Kingdom (5 %) (Table 2). The candidate countries have around 36 million pigs, i.e. 29 % of the EU-15 population in 2000.

	Piglets < 20 kg	Breeding sows ≥ 50 kg	Other pigs	Total pig population	Average size of holdings
	1,000	1,000	1,000	1,000	LU ²
B	2,085	720	4,564	7,369	175
DK	3,582	1,284	6,760	11,626	179
D	6,644	2,681	16,776	26,101	46
EL	264	129	576	969	7
E	5,460	3,266	13,289	22,015	32
F	5,427	1,416	8,027	14,870	55
IRL	526	177	1,019	1,722	319
I	1,579	713	6,311	8,603	12
L	33	10	44	86	52
NL	5,239	1,373	6,955	13,567	177
A	863	333	2,230	3,425	10
P	702	334	1,382	2,418	5
FIN	412	37	847	1,296	65
S	651	220	1,244	2,115	83
UK	1,680	684	4,079	6,443	144
EU-15	35,147	13,350	73,929	122,294	31

Table 2: Structure of the pig population in 2000

	Proportion of holdings	Proportion of pigs
B	26.4 %	65.5 %
DK	25.8 %	74.0 %
D	3.4 %	34.3 %
EL	0.6 %	58.5 %
E	3.4 %	68.2 %
F	8.3 %	65.4 %
IRL	18.0 %	94.4 %
I	0.8 %	79.3 %
L	5.6 %	38.9 %
NL	27.9 %	69.7 %
A	0.1 %	3.3 %
P	0.4 %	57.3 %
FIN	3.2 %	14.9 %
S	9.3 %	49.3 %
UK	16.5 %	81.0 %
EU-15	3.5 %	59.3 %

Table 3: Holdings with more than 1,000 pigs in 2000

In 2000 in EU-15, 900,000 holdings raised pigs, with most of the production being on large-scale holdings. 83% of pigs are bred on holdings of 400 pigs or more and 60% on holdings of 1,000 or more³ (Table 3). It should be noted that in many countries the large holdings are still family-owned. The 620,000 holdings with fewer than 10 pigs (70% of pig farms) account for just 1.2% of the population, and those with fewer than 100 pigs (740,000) make up only 4.7% of the total.

Between 1990 and 2000, the number of pig farms in EU-12 fell from 1.5 million to 0.8 million. This fall was mainly amongst small and medium-sized structures with less than 100 pigs (-49%), as the number of holdings with over 1,000 pigs rose by 61% over the same period (Table 4).

Population (pigs)	Number of holdings (1,000)		Trend
	1989/90	1999/2000	
1-2	779.7	386.6	- 50 %
3-9	295.4	168.6	- 43 %
10-49	163.6	80.3	- 51 %
50-99	54.7	27.8	- 49 %
100-199	48.7	27.2	- 44 %
200-399	45.4	29.0	- 36 %
400-999	48.1	41.1	- 15 %
≥ 1 000	20.0	32.2	+ 61 %
Total	1,455.5	792.1	- 46 %

Table 4: Trend in the number of holdings by size in EU-12

² Livestock units. The coefficients used for the conversion are as follows: 0.027 LU per piglet of under 20 kg, 0.5 LU per breeding sow of over 50 kg and 0.3 LU per other pig.

³ By way of comparison: in the USA, 75% of pigs were raised in holdings of over 1,000 pigs in 1997, 40% in holdings of over 5,000 pigs (source: NASS-USDA).

In Belgium, Denmark, Ireland and the Netherlands, the average size of pig farms has risen significantly over the last 20 years to over 150 pigs per holding in 2000 (**Figure 3**). In Ireland and the United Kingdom, 94% and 81% of pigs respectively are raised in holdings of 1,000 pigs or more. Italy, for its part, has - like other southern European countries - a large

number of small farms: 92% have fewer than 10 pigs. On the other hand, 79% of Italian pigs are raised on holdings with 1,000 pigs or more. Austria is the country with by far the fewest large structures, as only one in every three pigs there is bred on a farm with 400 pigs or more (**Figure 4**).

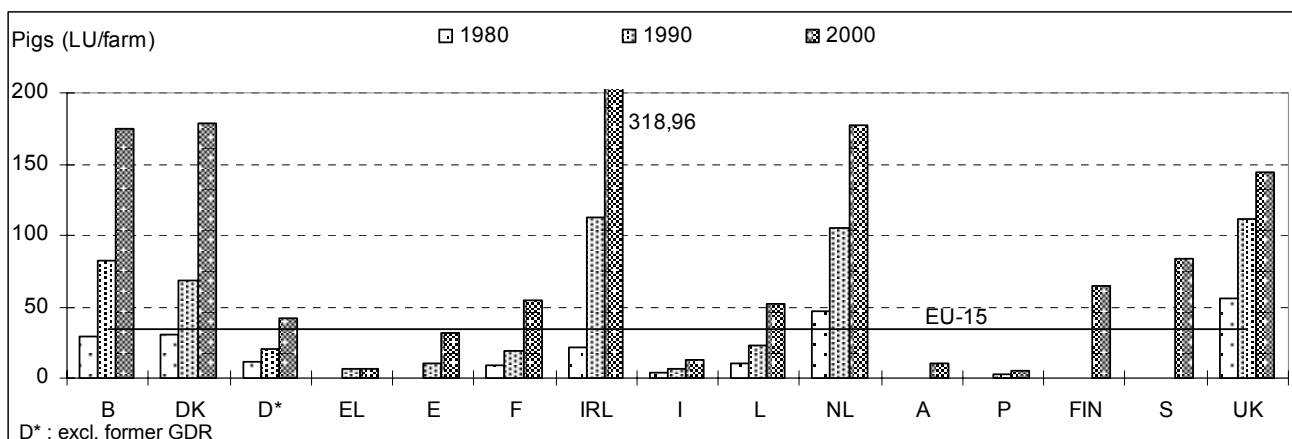


Figure 3: Trend in the size of pig farms

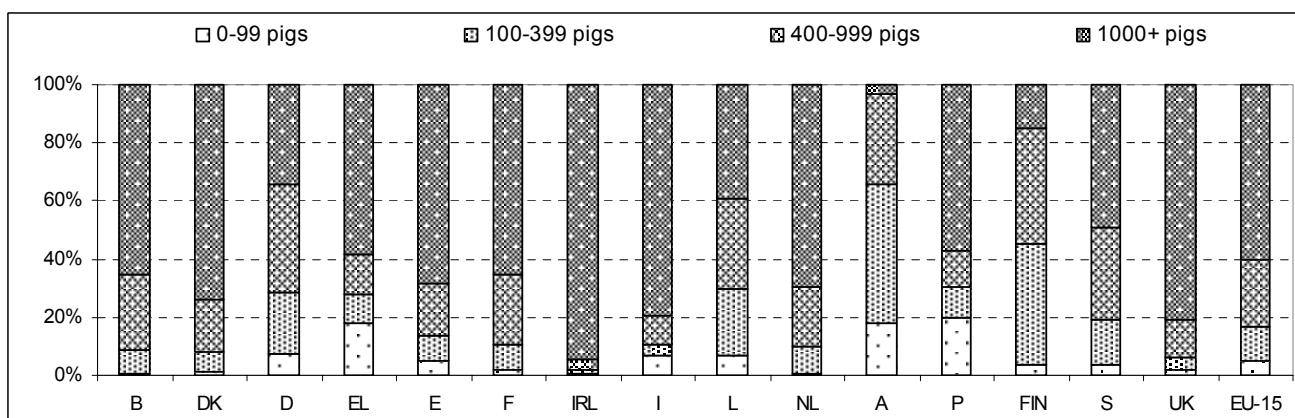


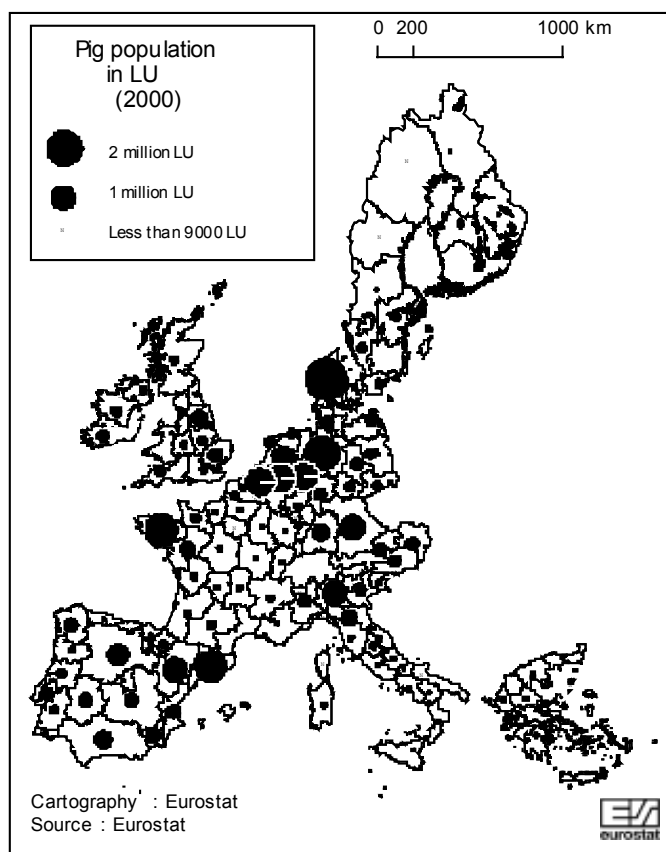
Figure 4: Breakdown of the pig population by size of farm in 2000 (in % of the number of pigs)

At regional level, the differences are more pronounced. Between 1990 and 2000, the pig population fell in some regions such as *Brandenburg* (D), which lost 557,000 pigs or 42% of its pig population, or *Nord-Pas-de-Calais* (F), which rose significantly in other regions such as *Cataluña* (E): + 2,194,000 pigs, an increase of + 57%. In 2000, 9 regions in the EU, covering 10% of the UAA, accounted for half of the pig population (recorded in

LU) (**Map 1**). *Denmark* has 2.8 million pig LUs or 9.3% of the total, *Niedersachsen* (D) has 6.6%, *Bretagne* (F) 5.9%, *Vlaams Gewest* (B) 5.7%, *Zuid-Nederland* (NL) 5.4%, *Cataluña* (E) 5.3% and *Nordrhein-Westfalen* (D) 5.1%. The 34 regions with the lowest pig populations account for barely 1% of the total, but cover 9% of the UAA.

The regions in which pig production is most developed are often situated near ports (which makes the import of feeds cheaper), and sometimes in areas of poor agronomic potential and/or where there is little available land (*Bretagne*, Belgium, Netherlands). In these regions, an infrastructure has been built up to service this sector (feed mills, slaughterhouses, marketing structures, processing facilities, etc.), producing significant local economies of scale, and developing local equipment and expertise.

The presence of a large number of animals in some regions puts great pressure on the environment, and can lead to health problems for pigs or humans and pollution of the natural environment (**Boxes 1, 2 and 3**). In addition, this geographical specialisation also represents an economic risk should the sector find itself in difficulties. This "concentration" of pig-breeding (large holdings, specialisation in certain production areas) can also have positive effects on a social level in terms, for example, of the price paid by the consumer for pigmeat, or in terms of regional development and better pollution control. The key issue is therefore to find the optimum size which makes it possible to satisfy all the economic, environmental and social demands made by society, both at the level of the holding and of the region.



Map 1: Regional breakdown of the pig population (in LU)

Box 1: The environment and pig farming

Pig farming has a multifaceted - and very often negative - impact on the environment: water, air and soil pollution, odours, loss of genetic diversity, lowering of groundwater levels.

Its impact varies depending on the level involved (local, regional, global, etc.). For example, the odours caused by pig farming will have a strong short-term impact at local level, whereas nitrous oxide emissions are a long-term contributory factor in global warming. Similarly, water pollution may have an impact on human health (the quality of drinking water) and on the environmental balance (eutrophication).

If pig farms are close to each other, the effectiveness of controls and the treatment of manure can, however, be improved and other areas can be preserved. Nevertheless, it is necessary to take action to limit the risks of diseases spreading and to ensure that this production is sited far from urban centres.

Mention should also be made of certain environment-friendly types of farming, such as outdoor husbandry systems (Iberian pigs which feed off sweet acorns in the Spanish *dehesas*⁴, for example) which help maintain and preserve the landscape.

⁴ Sparse oak-tree forests used in the past as pastures and for collecting firewood

Box 2 : Nitrogen pollution related to pig farming

Multiplying the regional pig population by national coefficients for the excretion of nitrogen⁵ gives theoretical quantities for nitrogen of porcine origin. This calculation produces high values for several regions in the EU: *Zuid-Nederland* (NL) with 164 kg N/ha UAA, *Vlaams Gewest* (B) with 122 kg N/ha UAA, *Oost-Nederland* (NL) with 68 kg N/ha UAA, and *Denmark* with 61 kg N/ha UAA (the "nitrates" directive limits the land application of livestock manure to a quantity containing 170 kg of nitrogen per ha in vulnerable zones). Local problems can therefore arise in these regions. In effect, this nitrogen cannot be spread without causing damage to the whole of the UAA in the regions in question, particularly when other types of livestock are raised there. Nor can it be spread on neighbouring regions, which are relatively saturated. The only possible solution is therefore to treat this manure, but this is still relatively costly.

Environmental protection measures involve additional costs, which seem to be higher for very large holdings which then lose some of the profits gained from economies of scale. A study has been conducted in Denmark, where the legislation is relatively strict, for 3 types of farms of differing sizes (**Table 5**).

	Type A 125 AU ⁽¹⁾	Type B 249 AU	Type C 499 AU	Comments
Number of pigs produced per year	2568	5116	10252	
Manure produced (t)	1968	3921	7858	
Costs (in €⁽²⁾)				
- Storage	1.55 – 1.72	1.26 – 1.38	1.22 – 1.34	9 months compulsory storage
- Storage cover	0.29 – 0.35			
- Land application	1.54 – 1.97			
- Transport to place of land application	-		0.67 – 0.84	For C, the quantities to be applied cannot be spread over a small area if the maximum quantity set per ha (140 kg of N) is observed
- Documents kept (planning, balance, etc.)	0.23	0.18 – 0.20	0.31 – 0.39	For C, application for consent and monitoring of surplus content
Gross cost (in €)	3.61 – 4.27	3.27 – 3.90	4.03 – 4.89	
Value of the manure (in €)	1.50			
Net cost (in €)	2.11 – 2.77	1.77 – 2.40	2.53 – 3.39	
Total cost of gross production (in €)	53.02	50.90	48.21	
Proportion of total cost spent on managing manure	4.0 – 5.2 %	3.5 – 4.7 %	5.2 – 7.0 %	
⁽¹⁾ 1 animal unit (AU) = 1 sow and 22 pigs produced in the year.				
⁽²⁾ the costs are given in €/pig produced (pigs of around 100 kg)				
Source: OECD – Agriculture, trade and the environment in the pig industry. Joint working party on agriculture and environment				

Table 5: Study of environmental costs by size of holding in Denmark

Studies of agricultural holdings have, moreover, revealed that the reluctance of farmers to change their agricultural practices is mainly related to manpower issues. The problem should therefore be viewed from the level of the farm. Similarly, the economic advantages of high regional densities can be eroded by the compliance costs.

⁵ See *Statistics in Focus, Theme 8, No 16/2000, Nitrogen balances in Agriculture*

Box 3: What are the prospects for curbing pollution?

Potential nitrogen pollution by pig farms can be controlled in a number of ways. The most radical is to reduce the number of farms and pigs, a reduction which has been encouraged in the Netherlands and in Belgium (early retirement, grants for stopping activities).

There are, however, a number of agricultural practices which can also limit pollution from pig-farming, even if it is still difficult to quantify their environmental benefits at a regional level. These practices, which are encouraged by a large number of Member States, have been adopted to varying degrees. There is an increasing tendency for them to be made compulsory in Northern Europe (**Box 4**).

They can relate to:

- the storage, spreading and treatment of manure (landfill, energy recovery, etc.)
- animal feeds (nitrogen content, heavy metal content, suitability for the stage of growth, etc.)
- farm buildings (ventilation, floor covering, etc.)
- genetic research (resistance to diseases, digestibility of proteins, etc.)

The presence of large farm structures should not be systematically equated with environmental pollution. An intensive pig farm run by a well trained farmer can have a low negative impact on the environment (less nitrogen excreted per kg of meat produced, or a low consumption of water and feed). In addition, methods for reducing pollution by pig farms are sometimes more applicable to large holdings.

It is also necessary to compare the cost of preventive measures with that of curative measures. A study has shown that the cost of treating drinking water for nitrates excess can be 5 to 10 higher than the cost of changing agricultural practices to reduce the rate of nitrates. Agreements reached in Austria and Germany between water supply companies and farmers have shown the benefits of dealing with pollution at source.

Box 4: Pigs and the environment: no specific European legislation

There are few measures which specifically concern the pig industry. The problem of reducing the level of water pollution, which is the main environmental objective of regulatory measures in the pig-farming sector, is basically tackled by the "nitrates" directive (676/91/EC). The "drinking water" directive (98/83/EC) and the framework directive on water policy (2000/60/EC) also apply.

The "nitrates" directive mainly obliges the Member States to:

- define "vulnerable zones", i.e. zones which drain into waters which are - or could be - polluted by nitrogen compounds,
- establish codes of good agricultural practice, including in particular the rules relating to the conditions for the storage and land application of livestock manure,
- establish action programmes for the vulnerable zones which incorporate the code of good agricultural practice,
- monitor water quality (nitrate content, eutrophication).

The measures to be applied are drawn up at Member State level, which gives rise to a wide range of regulations, even within the same production area (such as the Flanders region of Belgium and the south of the Netherlands).

In Belgium and the Netherlands, fertilisation plans are compulsory and manure surpluses are taxed, land application is forbidden during several months of winter, and the manure has to be injected directly into the soil. Some Member States impose rules concerning the distances separating farms and houses or award "green" labels to farm buildings. There are also measures to encourage the rearing of certain local breeds of pigs which are in danger of extinction.

Other regulations also concern pigmeat production, such as directive 96/61/EC, and directives 85/337/EC and 97/11/EC. These make it necessary for large-scale farms to submit an application for development consent and to conduct an assessment of the effects of the project on human beings or the environment.

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