Statistics

in focus

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THEME 5 – 3/2001

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Contents

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The range of agricultural holdings and fruit and vegetable production

1. Vegetables

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Fruit and vegetables account in equal proportion for an eighth of the economic activity in EU agriculture (measured by SGM[1]). A quarter of this gross margin is generated by five regions (two in Spain, two in Italy and one in the Netherlands). Vegetable production in the European Union is mainly for the domestic market. Roughly two thirds of the fresh vegetables grown in EU-15 come from Italy, Spain or France. The area devoted to growing fresh greenhouse vegetables has increased since 1975, but in 1997 it still accounted for only 5% of the total area for growing fresh vegetables. However, they represented more than a third of the standard gross margin (SGM) for fresh vegetables. Fruit and vegetables both come under the Common Organisation of the Market (COM). The diversity of this sector of production is apparent with regard to agricultural holdings, types of farming and marketing.

Fruit and vegetables, an eight of the economic activity of EU agriculture

Fruit and vegetables (excluding potatoes and bananas) fall under the same COM. **(Box 4 page 7).** Yet their method of production is extremely varied (permanent crops or arable land, under glass or open air, climate requirements…) analysing this sector thus needs care. Production is very varied, in the case of holdings as well as products. Together, they account for 12.5% of total SGM[1] in agriculture. Fruit and vegetables contribute in equal proportion to this figure **(Figure 1).**

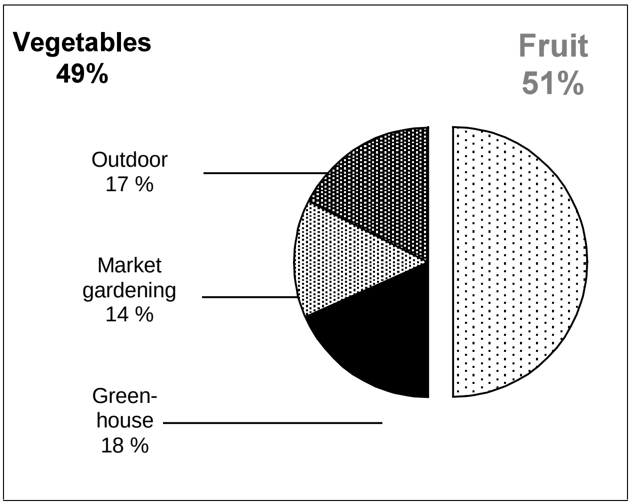

Figure 1: Breakdown of SGM of fruit and vegetables by type of product 1997, EU-15 (excluding Germany)

The SGM generated by vegetables is equally divided among three types of farming (market gardening[2], outdoor farming, green house cultivation), although when it comes to area the situation is completely

[1] *SGM: standard gross margin= specific products – specific costs (more information can be found in Statistics in Focus, Theme 5, No 9/2000). It is very highly correlated (correlation coefficient= 0,99) to measured gross production for fruit and vegetables, in the regions where these two indicators are known.*

[2] *Among fresh vegetable crops, market garden crops come under crop rotation with horticultural plants. Other outdoor crops are called field crops.*

different, with the three types of farming accounting for 332 000, 884 000 and 67 000 hectares respectively. The wide range of vegetable crops makes it difficult to analyse production by individual crop, except for tomatoes **(Box 3 page 6).** A quarter of the SGM for fruit and vegetables is accounted for by five regions: *Andalucía* and *Comunidad Valenciana* (E), *Sicily* and *Emilia Romagna* (I) and *West-Nederland* (NL). A half is accounted for by 15 regions (Figure 2).

The regions growing fruit and vegetables are mainly located in the south of the European Union, but there are some other areas that also contribute more than 1% of SGM for fruit and vegetables:

- regions with greenhouse cultivation: Vlaams gewest en *Brussel* (B), *Zuid et West-*Nederland(NL);
- regions with outdoor farming: *South East* (UK), *Aquitaine* (F), *Brittany* (F);
- a fruit growing area: *Bolzano-Bozen* (I);
- areas of periurban market gardening: *Lisbon* (P), *Hamburg*, *Bremen*, *Berlin* (D)

Greenhouse cultivation of fruit and vegetables in Belgium and the Netherlands alone accounts for 5.7% of Europe's SGM for fruit and vegetables.

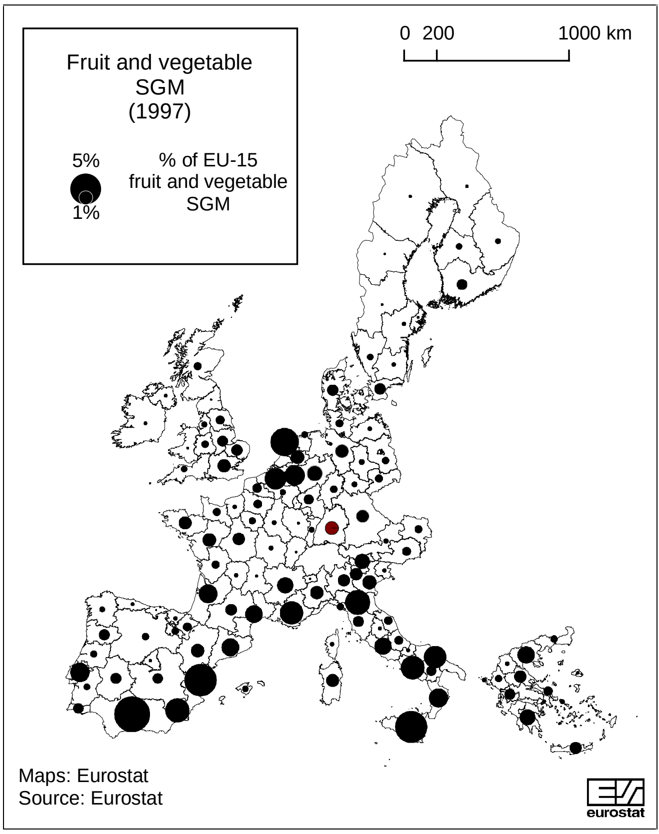

Figure 2: SGM of fruit and vegetables, 1997

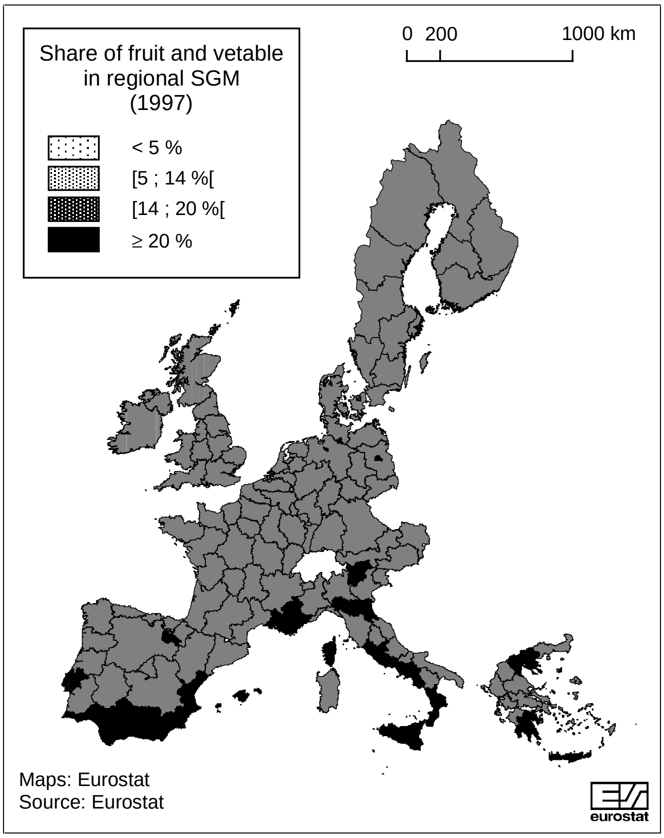

Figure 3: Share of SGM of fruit and vegetables in regional SGM, 1997

In some regions, the economic significance of fruit and vegetables is way above the European average **(Figure 3).** Out of 126 regions:

- seven regions generate more than half of their total regional SGM from fruit and vegetable production: *Comunidad Valenciana, Murcia, Madeira, Canarias* (E), *Algarve* (P), *Bolzano-Bozen, Trento* (I);
- 23 regions generate more than a quarter of their regional SGM from fruit and vegetables production;
- nearly one region in two generates more than 5% of its total regional SGM from fruit and vegetables production.

In EU-15 in 1997, only 1.2% of holdings classified in accordance with the survey on the structure of agricultural holdings **(Box 5 page 7)** specialised in the outdoor farming of vegetables (Farm type 143), and only 1.8% in market gardening (Farm type 201). Holdings specialising in fruit (Farm type 32) or vegetables (Farm type 143 and 201) account for 8.8% of European agriculture's SGM (4.2% for fruit, 1% for outdoor vegetables and 3.6% for market gardening) while occupying only 2.5% of area.

Fruit and vegetables are generally grown on specialised holdings.

Fresh vegetables mainly for the internal market

Fresh vegetable production, excluding kitchen gardens, **(Box 1)** totalled 52.4 million tonnes in EU-15 in 1999. The main producer countries were Spain, Italy and France **(Figure 4)**, which together accounted for 64% of all production.

In spite of some big fluctuations, production of fresh vegetables in Italy increased to 15.2 million tonnes in 1999, i.e. close on 30% of all production in Europe. In Spain production went up by 26% between 1986 and 1999, rising from 9.6 to 12.1 million tonnes. In France, where the increase in production was less marked but steadier, the figure rose from 4.5 million tonnes in 1970 to 6.3 million in 1999, an increase of 40% in 27 years. Greece ranks fourth for the production of fresh vegetables, with production steady since 1987 at about 4 million tonnes per year. Production in the United Kingdom declined slightly, and in 1997 it fell below 3 million tonnes. There was a big increase in production in the Netherlands, where the figure rose from 2.1 to 3.6 million tonnes between 1975 and 1999.

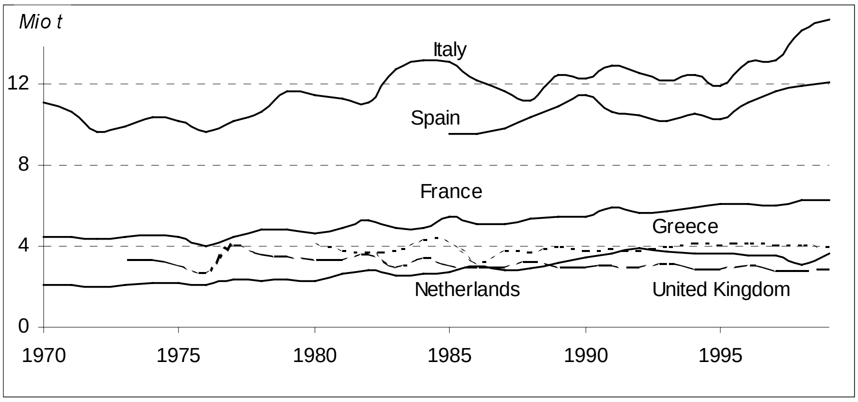

Figure 4: Trends in the production of fresh vegetables

Box 1: Kitchen gardens - producing substantial quantities of vegetables

Kitchen gardens in EU-15 in 1997 covered a total area of well over 150 000 hectares[3], i.e. more than an eighth of the outdoor area under fresh vegetables. The fraction is two thirds in Portugal and Austria and a quarter in Greece and Italy.

Kitchen garden production represents a considerable share of vegetable production in a number of EU countries. In Italy and France alone, for example, kitchen garden production is equivalent to 7.3% of European vegetable production excluding kitchen gardens.

	Vegetable production			Area of kitchen garden source FSS[4] (ha)
	Total (1000 t)	Kitchen gardens		
		1000 t	Share	
B	1 561	205	13%	1 561
DK	213	0	0%	213
D	3 471	874	25%	3 471
EL	4 107	NR	-	4 107
E	11 620	NR	-	11 620
F	7 728	1 685	22%	7 728
IRL	329	76	23%	329
I	15 110	1 903	13%	15 110
L	6.2	4.6	75%	6.2
NL	3 768	200	5%	3 768
A	459	0	0%	459
P	2 052	NR	-	2 052
FIN	259	NR	-	259
S	236	NR	-	236
UK	2 854	NR	-	2 854
EU-15	53 774	4 948	-	53 774

NR: not received from Member State.

[3] The figures taken from the survey on the structure of agricultural holdings are under-counted since they cover only the kitchen gardens of agricultural holdings exceeding 1 hectare in area. This means that the total area of kitchen gardens easily exceeds 150.000 ha, since the figures recorded in the production survey for Germany and Italy come to 62 800 and 93 000 hectares respectively.

Imports of fresh vegetables from outside the Community are equivalent to 2% of production (average figure for 1996 to 1998). The 0.9 million tonnes of imported vegetables - mostly tomatoes - came mainly from Morocco. In the case of exports of fresh vegetables (1.1 million tonnes), Switzerland is the main customer for EU products, followed by the United States, Russia and the countries of Eastern Europe **(Box 2 page 6).**

The European Union is self-sufficient in fresh vegetables, and the bulk of its trade is within the Community. Intra-Community imports amount to 6.9 million tonnes (13% of production). Tomatoes (1.5 million tonnes) are the main product traded.

Holdings *specialising in outdoor vegetables* (Farm type 43) can be found mainly in Italy **(Figure 5).** They account for 56% of Europe's SGM for category Farm type 143. The bulk of this production consists of tomatoes for processing. Holdings specialising in outdoor vegetables account for more than 1% of total regional SGM in a number of regions: Lisbon region (6.1%), Midlands (UK), Brittany (F), coastal areas along the Bay of Biscay (E and F), Extremadura (E) and the Rhine plain (D).

Holdings *specialising in market gardening* are mainly found in irrigated Mediterranean areas, regions of greenhouse farming (B and NL) and around major urban centres **(Figure 6).** *Ile de France* (F), *Lisbon* (P), *Sydsverige* (S), *Hamburg, Bremen* and *Berlin* (D) are periurban agricultural areas providing fresh products for the cities they surround.

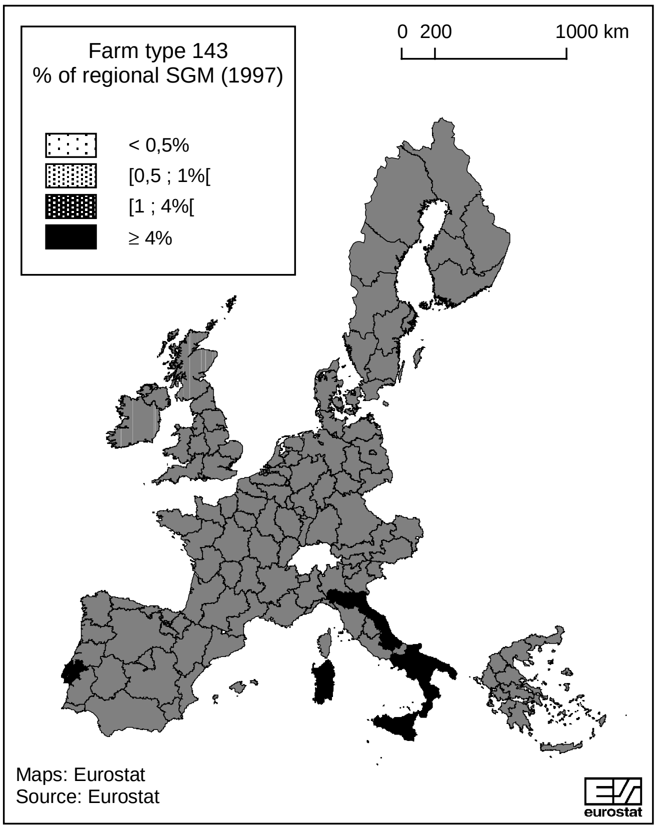

Figure 5:Contribution of holdings specialising in outdoor fresh vegetables (Farm type 143) to regional SGM

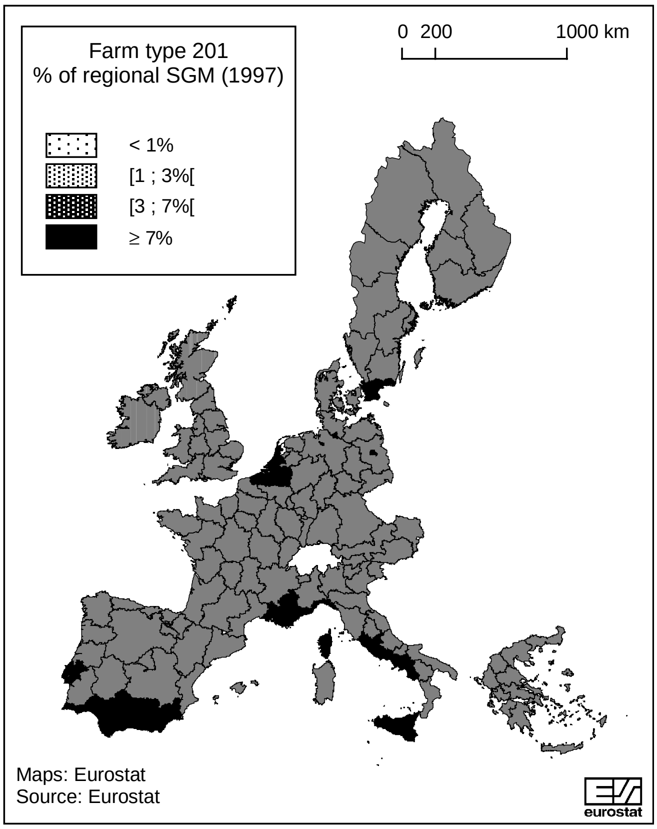

Figure 6: Contribution of holdings specialising in market gardening (Farm type 201) to regional SGM

In EU-15 in 1997, fresh vegetables, melons or strawberries were grown outdoors on 718 600 holdings covering 1.2 million hectares. Most of these holdings are located in the Mediterranean region (77% of all such holdings are in Italy, Spain and Greece).

When areas under cultivation are considered, the situation changes **(Figure 7).** France rivals Italy with 260 000 hectares, with Spain (220 000 hectares) not far behind. In the United Kingdom, where vegetable holdings tend to be few in number but large in size (12.8 hectares of vegetable crops per holding involved in such farming), the total area under cultivation amounts to 130 000 hectares.

Areas used for vegetable cultivation have been growing in France, the Netherlands and Germany (excluding the former GDR[4]),

[4] *In order to avoid having to take account of changes resulting from German unification, the figures for EU-9*, EU-12*, D*, etc, exclude the former GDR.*

with respective increases of +13%, +26% and +56% between 1975 and 1997. The figures in the Mediterranean countries moved the other way between 1987 and 1997, with reductions of 22% in Greece, 18% in Italy, 13% in Spain and 9% in Portugal.

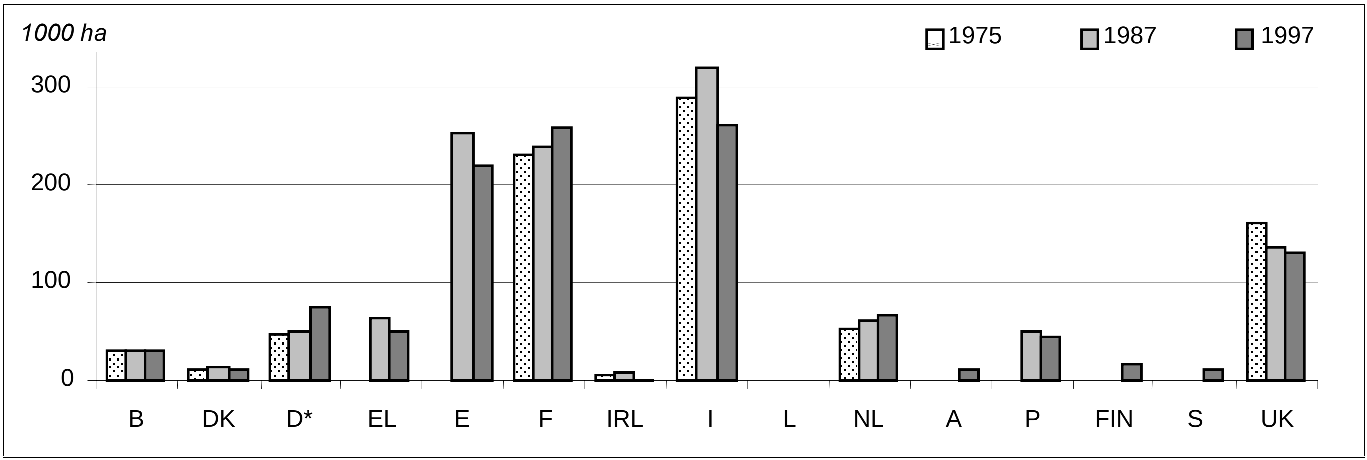

Figure 7: Areas under outdoor fresh vegetables, melons and strawberries

Greenhouse production of fresh vegetables, melons and strawberries expanding in area

Fresh vegetables, melons and strawberries were grown in greenhouses by 86 500 holdings in EU-15 in 1997. This type of production involved 60% of holdings with greenhouses and accounted for 71% of greenhouse area.

In EU-9* between 1975 and 1997 the number of holdings growing fresh vegetables in greenhouses declined much less (-15%) than the number of those producing outdoor vegetables (-56%). This average reduction was the result of a sharp increase in Italy (+88%), coupled with a decline of about 50% in northern Europe (NL, UK and D).

The area devoted to the greenhouse cultivation of fresh vegetables went up by 57% in EU-9* between 1975 and 1997. The figure tripled in Italy (from 5 300 to 16 400 hectares), while in Spain the figure doubled (from 15 200 to 32 600 hectares) in the ten years to 1997. Together, these two countries account for three quarters of the total area of greenhouse cultivation in EU-15. In the other Member States, such area remained stable or declined slightly.

The average size of holdings growing greenhouse vegetables was 78 ares in 1997. An average size of at least 1 hectare was attained only in the Netherlands (1 hectare) and Spain (1.3). With a figure of 73 ares, Italy was close to the EU average.

Cultivation of fresh vegetables, melons and strawberries is divided between outdoor farming (open-grown and market gardening) and greenhouse farming **(Figure 8).** For the Union as a whole in 1997, outdoor farming accounted for 95% of these crops (73% open-grown and 27% market gardening).

There was a strong rise in greenhouse farming in EU-12* between 1987 and 1997, with greenhouse area rising from 3.3% to 5.4% of the total area used for cultivation of fresh vegetables. The main reason for this rise was the increase in Spain (from 5.8% to 12.8%).

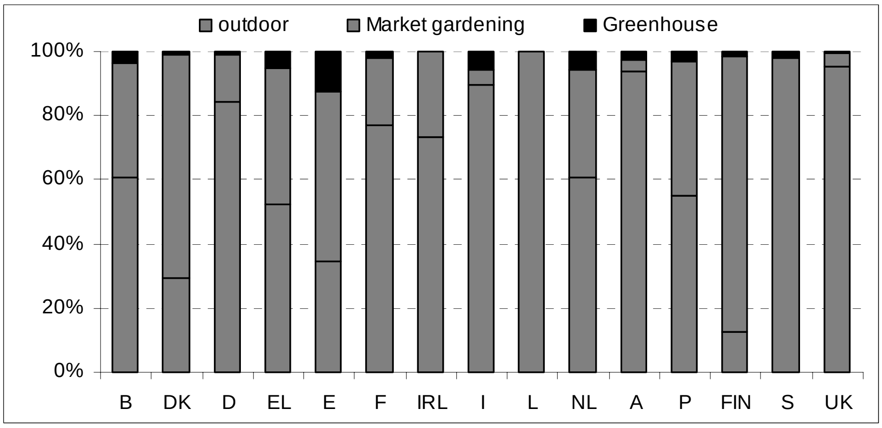

Figure 8: Method of cultivating fresh vegetable, melons and strawberries, 1997

Box 2: Production by vegetable crop and the candidate countries

Fresh vegetable production in the candidate countries[5] amounts to more than 30 million tonnes, equivalent to two thirds of EU production. Turkey grows a lot more vegetables for fruit than Italy, the main EU producer, and Poland produces more root and tuber crops (and also cabbages) than the main European producers. The accession of these countries to the European Union will thus have quite a considerable impact on the fruit and vegetable market. EU external trade should reap the benefit.

Half of the vegetables produced in the Union are grown for their fruit, with tomatoes accounting for nearly two thirds of all production. In spite of considerable production of carrots and onions, root and tuber crops account for only a sixth of the total volume produced. Pulse crops represent only 4% of production in volume terms but have a high unit value.

Production in millions of tonnes	Total		Main producer		
	EU-15	CC-13	EU-15	% EU-15	CC-13
Vegetables cultivated for fruit	**25.9**	**20.6**	Italy : 9.3	36%	Turkey : 15.7
In which - tomatoes	14.9	8.1	Italy : 6.2	42%	Turkey : 6.4
- melons, watermelons	4.1	6.6	Spain : 1.8	43%	Turkey : 5.4
Leafy or stalked vegetables	**13.4**	**7.4**	Italy : 3.9	29%	Poland : 2.4
In which - lettuce	2.6	0.2	Spain : 1.0	40%	Turkey : 0.1
- cauliflower	2.2	0.4	Italy : 0.7	30%	Poland : 0.2
Pulses	**2.0**	**0.8**	France : 0.7	34%	Turkey : 0.6
Roots and tubers	**8.6**	**4.7**	Spain : 1.6	19%	Poland : 2.2
In which - carrots	3.4	1.7	France : 0.7	19%	Poland : 0.9
- onions	3.6	1.7	Spain : 1.0	27%	Poland : 0.7
Other fresh vegetables	**1.3**	**0.7**	France : 0.4	35%	Poland : 0.4
Total	51.2	34.2	Italy : 14.6	28%	Turkey : 18.2

Production of fresh vegetables, EU-15 and candidate countries (CC-13)

Three-yearly averages 1997/98/99, 1996 figures for Slovenia, 1994 national data for Turkey

[5] *Bulgaria, Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovenia, Slovakia and Turkey.*

Box 3: Tomatoes are Europe's leading vegetable

Tomatoes are the main crop grown in the European Union. In 1999 the total area under tomatoes in EU-15 amounted to 270 000 hectares, about half of which was in Italy. Tomatoes in fact accounted for 32% (16.3 million tonnes) of vegetable production. This figure is way ahead of other crops, such as onions (8%), carrots (7%), lettuce (5%) and cauliflower (4%).

Almost all (97%) of the tomatoes grown in the EU in 1999 came from six Member States: Italy (7.2 million tonnes), Spain (3.9 million), Greece (2 million), Portugal (1.39 million), France (0.92 million) and the Netherlands (0.53 million), where production is mainly in greenhouses.

Europe’s tomatoes are primarily for consumption within the Community, as either fresh or processed products. A substantial part of the production of the "Mediterranean" countries is processed: three quarters in Portugal, two thirds in Italy and a third in France and Spain. Of these countries, only Spain exports more than a quarter of its production as fresh produce. Production in northern Europe is geared more to the consumption of fresh tomatoes.

Tomatoes have tended to rank top for intervention expenditure in the vegetable market in recent years, accounting for more than half of such expenditure. On the other hand, the figure for the percentage that is withdrawn (1.5% in 1997/98/99) is lower than for cauliflower (6.4% in the same period).

Box 4: Common organisation of the market undergoing tremendous change

The common organisation of the market in fruit and vegetables was reformed in 1996, the aim being to help and encourage producers in the EU to cope successfully with a more open and competitive market in the coming years by strengthening their main advantages:

- the quality of their products;
- their ability to respond to a rapidly changing market;
- the services they can offer in connection with a varied range of healthy products.

With this aim in mind, budget resources have focused on the financing of positive measures: market orientation, decentralised management, grouping of supply (currently fragmented in response to demand) through producer organisations. The purpose of these measures is to build for the future and to incorporate environmental concerns.

Three regulations were adopted, and major amendments were recently made to all three by Regulation (EC) No 2699/2000.

- *Council Regulation (EC) No 2200/96 on the common organisation of the market in fruit and vegetables*
  For fresh fruit and vegetables, this regulation reflects the general objectives: (i) by **strengthening the role of producer organisations** (creation of an operational fund, administered by the producer organisations and jointly financed by the Community, permitting the funding of a programme of structural measures - operational programmes); (ii) by amending the **way of administering short-term surpluses** (cutting compensation for withdrawals and limiting the quantities that producer organisations can withdraw) in order to reduce the risk of structural surpluses. This regulation brought about a simplification of operational fund arrangements by fixing a single ceiling (4.1% of the value of the marketed production of each producer organisation).
- *Council Regulation (EC) No 2201/96 on the common organisation of the markets in processed fruit and vegetable products*
  For peaches, pears and tomatoes: help for processors who buy their raw products at a higher price than the minimum price set in connection with contracts signed before the start of the marketing year.
- *Council Regulation (EC) No 2202/96 introducing a Community aid scheme for producers of certain citrus fruits*
- *Council Regulation (EC) No 2699/2000 amending Regulations (EC) Nos 2200/96, 2201/96 and 2202/96*
  Aid given to producer organisations according to the weight of raw material delivered to processors, similar to the scheme that had existed for citrus fruits since 1996. The regulation also introduces thresholds for each Member State; if they are exceeded, the result will be a reduction in aid to the relevant Member States the following year.

Box 5: Sources of data on fruit and vegetables

1 – The Farm Structure Survey (FSS) allows the uniform recording of information on areas for the cultivation of fresh vegetables, melons or strawberries and on holdings that grow such crops (headings D/14 et D/15). The same kind of information is collected for permanent crops (heading G). Supplementary data on greenhouses and irrigation allow greater detail in profiling holdings. The attribution of SGM by product also makes it possible to classify holdings by type of farming. (Farm type). The data are taken from censuses conducted every ten years and from intermediate surveys carried out every 2-3 years on a representative sample of agricultural holdings. The last known results are from 1997 survey.

2 – The agricultural production database contains annual national data on the areas and yields of a large number of types and varieties of fruit and vegetables. It also contains data on the supply balances of 14 products (vegetables, tomatoes, cauliflower, fruit, etc).

3 – Intervention data come from DG Agriculture (Agriculture in the European Union - Statistical and economic information 1999, http://europa.eu.int/comm/agriculture/agrista/table_en/45.htm).

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