Statistics in focus

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Contents

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Twenty years of agriculture in Europe:

The tobacco industry and employment in less-favoured regions

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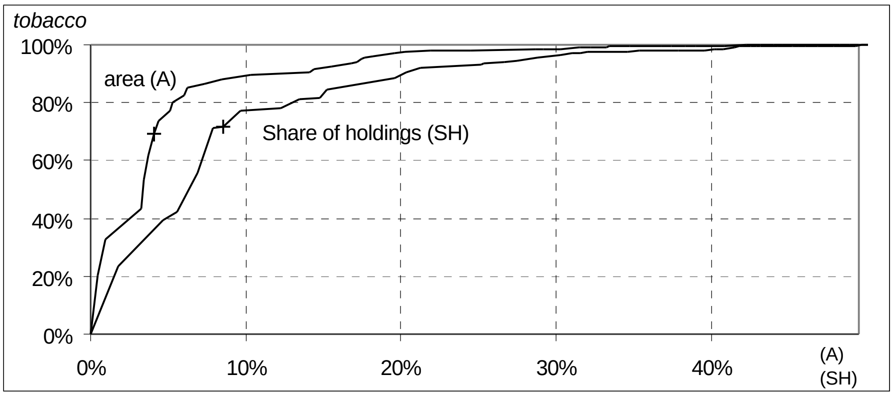
The European Union produces just one-twentieth of the world's tobacco and shows a considerable deficit. However, tobacco proves highly profitable in areas not suited to other crops, favouring hot, dry climates and poor soils. Its value added represents 1% of the value added of agricultural production in spite of a limited importance. It is generated by the significant labour component in the factors of production. Tobacco varieties and crop drying methods make for highly diversified production and marketing conditions. These factors are central to any studies of tobacco cultivation. For many years, the quality of the raw tobacco supplied to the first processors in the production chain was mediocre. Subsidies were introduced in 1970 to help producers improve the quality of the raw tobacco coming on to the market. These measures have helped bolster production of a crop that generates employment in less-favoured regions. The introduction of quotas is fully consistent with the market management approach and has had no real liberalisation effect on trade.

Highly localised production

At national level, more than 100 000 holdings were farming 150 000 ha of tobacco in EU-15 in 1997. At regional level, areas under tobacco are unevenly distributed (Fig. 1).



+ is the cumulative total of the seven regions[1] with the greatest areas under tobacco

Figure 1: Distribution of tobacco by region in EU-15 (1997)

World production is dominated by China (40% of production), the United States (9%) and India (8%). The European Community accounts for just 5% of world production and shows a major deficit in raw tobacco (around 50% self-sufficiency since 1996).

[1] Kentrifi *and* Anatoliki Makedonia kai Thraki, Ditiki Ellada *and* Thessalia *in Greece*, Extremadura *in Spain*, Campania *and* Umbria *in Italy*.

Raw tobacco contributes more than 1% of the gross value added of agricultural production. Four out of five hectares under tobacco are situated in Greece or Italy, and three out of four tonnes of raw tobacco come from these two Member States.

The seven most heavily planted regions represent 74 % of the area under tobacco and 77% of the holdings growing this crop, but account for just 4% of UAA[3] and 10% of holdings in EU-15 (cf. Fig. 1). This seven regions represent 75% of tobacco SGM[2] (outside Germany) and only 5% of total SGM (outside Germany).

One explanation for this phenomenon is the climatic and technical conditions needed to grow tobacco (hot climate, poor soil, acute demand for low-skilled labour) and the high level of investment for processors. The location of tobacco processing centres is both a cause and effect of the location of tobacco-growing areas.

Quota allocation and the know-how of growers serve to enhance this geographical concentration (Figs 2 and 3).

The existence of processing centres near major ports represents a structural exception.

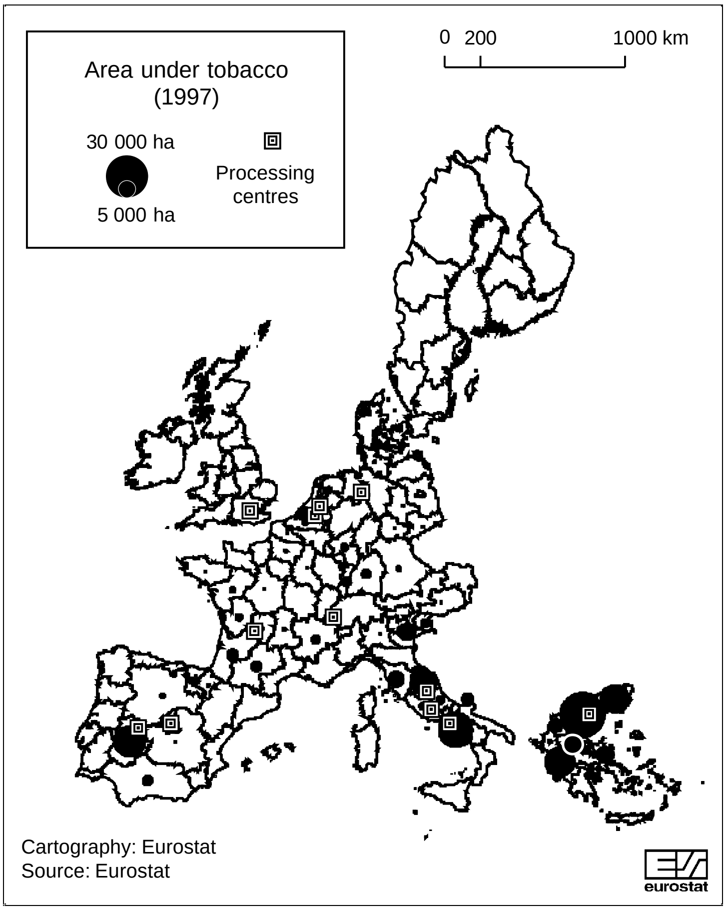


Figure 2: Location of areas under tobacco

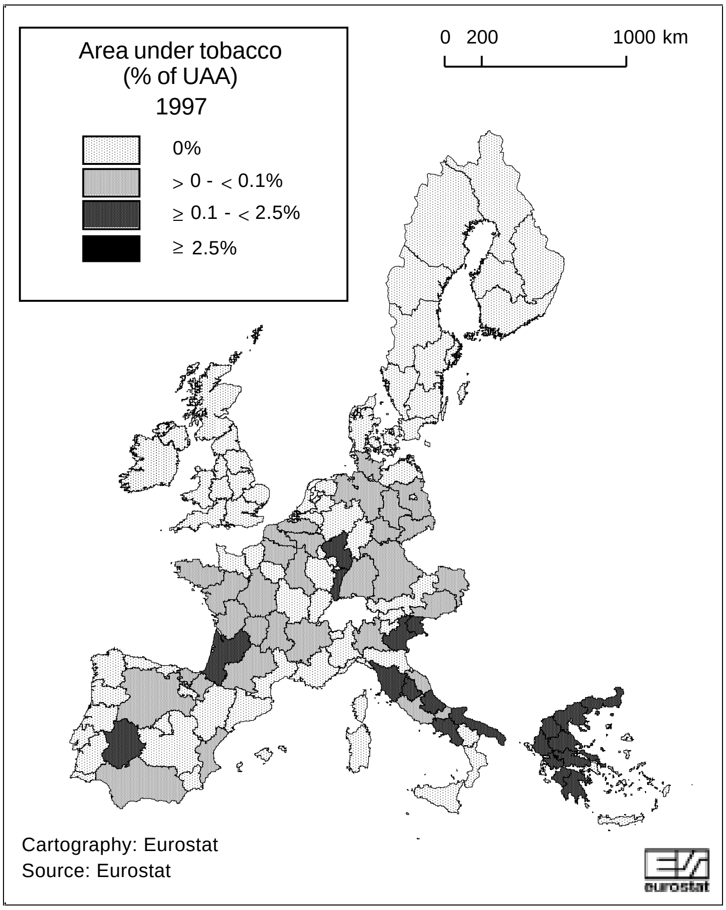


Figure 3: Tobacco as a portion of UAA

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[2] *SGM: standard gross margin, an estimate - based on coefficients (by ha or head) - of the gross margin excluding machinery and labour.*

[3] *UAA: utilised agricultural area.*

Likewise, the development of the tobacco industry in Italy during the 1980s (a growth of 57% between 1983 and 1989/90) upset this stable geographical distribution somewhat (Fig. 4). Basically, by structuring supply, producer groups have expanded the collection areas for processors and helped develop tobacco growing centres.

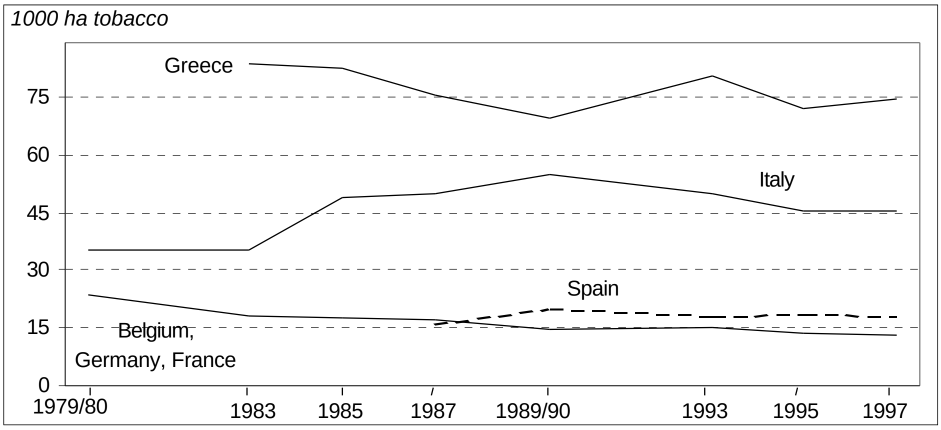

Figure 4: Changes in area under tobacco

Pronounced national differences in farming systems

Holdings growing tobacco are physically small (average UAA of 8.6 ha in 1997), but have an economic size that is greater than the mean economic size for holdings in the regions concerned. They employ much more labour per holding. Family and seasonal labour are thus more significant per hectare of UAA on holdings growing tobacco than on other holdings (3 and 3.5 times higher respectively). In Greece, one holding in ten grows tobacco. These holdings employ 16 % of the volume of family and seasonal labour (Box 1). Locally in Greece, holdings growing tobacco may account for over one-third of the volume of labour in agriculture.

Over half of all holdings with tobacco specialise in this crop[3] in Greece (58%) and Spain (54%). In Italy and Wallonia, the corresponding ratio is one to three. In France and Austria, even in the production regions, it is barely 5%.

		Belgium	Greece	Spain	France	Italy	Austria
Total holdings:							
Mean UAA	*ha*	20.6	4.3	21.2	41.7	6.4	16.3
Mean economic size	*ESU*	47.0	5.8	10.6	35.3	8.0	11.6
% of holdings with tobacco		ε	8.1%	0.4%	0.9%	1.1%	ε
Holdings with tobacco :							
Mean UAA	*ha*	17.4	5.0	22.6	44.0	7.3	20.3
Mean economic size	*ESU*	59.2	8.9	29.8	41.9	13.4	26.1
% of holdings specialising in tobacco		7.1%	58.5%	53.7%	2.9%	34.7%	0
% of holdings in EU-15		0.3%	64.8%	4.3%	5.8%	24.2%	0.1%

ε : under 0.1%

ESU:European Size Unit, equivalent to ECU 1 200 for the 1997 SSAH

Table 1: holdings growing tobacco (1997)

The low average UAA of tobacco holdings is attributable to the size of holdings in Greece, where they are all small. At national level, with the exception of Belgium, they are slightly larger than average (Table 1). The number of holdings growing tobacco without specialising in the crop is an important factor when interpreting these averages. For example, Spanish holdings growing tobacco are highly specialised but have little impact on the European average. In Italy, a national approach may prove inadequate for describing holdings growing tobacco.

The regional comparison (Box 1) accentuates the specific features observed at national level. The three zones in question represent three different farming structures. The small, highly intensive, holdings of *Voreia Ellada* stand in contrast to the large holdings of *Extremadura*. The high degree of specialisation amongst the tobacco growers of *Campania* explains the labour-intensive nature of production. This guarantees a certain quality, since the number of passes during harvest determines the quality of the leaves picked.

[4] *A holding is said to be* specialising in tobacco *(Farmtype 1441) if tobacco contributes more than 2/3 of its SGM.*

Box 1: Profile of holdings producing tobacco

The Survey on the Structure of Agricultural Holdings (SSAH) records a set of characteristics for all holdings or a representative sample. These data can be extracted for individual holdings. A comparison of holdings not growing tobacco, holdings specialising in tobacco and holdings growing tobacco plus other crops reveals a number of regional differences.

	Regions[a]	*Extremadura* (E)			*Voreia Ellada* (EL)			*Campania* (I)			EU-15
	Holdings[b]	No tobacco	With tobacco	FT 1441	No tobacco	With tobacco	FT 1441	No tobacco	With tobacco	FT 1441	All
No of holdings.	*1000*	65.41	2.99	1.82	255.28	48.32	30.3	184.76	16.65	6.19	6989
UAA	*1000 ha*	2821.9	63.3	30.0	1391.2	232.3	84.0	553.4	79.4	16.8	128691
Tobacco	*1000 ha*	0.0	15.8	12.3	0.0	53.9	35.2	0.0	19.2	9.7	151.0
Tobacco/UAA	*% ha*	0.0%	25.0%	40.9%	0.0%	23.2%	41.9%	0.0%	24.2%	58.0%	0.1%
UAA/holding	*ha*	43.1	21.2	16.5	5.4	4.8	2.8	3.0	4.8	2.7	18.4
SGM/holding	*ESU*	10.3	33.5	32.9	6.7	8.3	6.2	6.1	8.5	7.6	16.7
Labour force: total family	*AWU /100 ha UAA*	1.2	5.2	6.5	10.7	26.7	42.5	24.5	30.7	48.5	4.3
Non-family employed on a non-regular basis	*AWU /100 ha UAA*	0.4	5.7	6.2	1.7	3.1	4.4	3.6	2.4	5.1	0.5
total	*1000 AWU*	50.5	7.5	4.2	176.4	69.7	39.5	156.5	26.3	9.0	5068.4
Industrial crops excluding tobacco	*% UAA*	2.7%	5.8%	4.7%	23.7%	8.0%	1.8%	0.2%	0.1%	0.0%	5.0%
	% holding	6.4%	30.1%	25.8%	28.5%	11.4%	4.3%	0.4%	0.2%	0.0%	
Irrigated area	*% UAA*	6.3%	56.6%	54.2%	52.7%	41.9%	40.8%	19.7%	23.0%	54.3%	10.2%
	% holding	21.1%	100.0%	100.0%	72.3%	75.8%	69.5%	30.5%	55.1%	73.8%	33.0%
Grain-maize	*% UAA*	2.1%	10.3%	1.9%	9.4%	6.3%	3.3%	2.3%	3.9%	2.9%	3.4%
	% holding	9.7%	34.4%	15.9%	23.2%	20.2%	11.7%	11.7%	31.6%	16.2%	15.0%
Fresh vegetables, melons, strawberries (outdoor)	*% UAA*	0.8%	7.8%	3.6%	1.7%	0.8%	0.1%	3.4%	1.2%	0.4%	0.9%
	% holding	9.9%	42.5%	29.7%	9.2%	4.8%	1.7%	18.4%	13.5%	5.0%	10.3%
Fruit and berry plantations	*% UAA*	0.8%	1.6%	1.5%	5.5%	3.8%	1.2%	12.9%	0.8%	0.3%	1.6%
	% holding	12.6%	17.1%	15.9%	22.1%	15.7%	7.0%	29.5%	5.6%	1.1%	14.5%

[a] *Voreia Ellada* comprises four SSAH regions (*Thessalia*, *Dytiki Makedonia*, *Kentriki Makedonia* and *Anatoliki Makedonia kai Thraki*) and constitutes a territorial statistical unit at NUTS level 1.

[b] *Specialist tobacco holdings* (type 1441) are also recorded under holdings with tobacco

Characteristics of holdings growing tobacco in three areas (1997)

These regions represent 60% of land under tobacco and two-thirds of holdings growing tobacco in EU-15. In *Extremadura*, 98% of growers are in less favoured areas, as are 64% in *Voreia Ellada* and 42% in *Campania*, compared with 55% in the EU as a whole.

In all three areas, tobacco holdings are economically significant (in terms of SGM) and show a high level of family labour and irregular (seasonal) non-family labour in relation to utilised agricultural area (UAA). The relatively high density of seasonal labour in *Campania* reflects a high degree of specialisation by the holdings concerned (tobacco as a portion of UAA). These holdings are physically small (in terms of UAA) compared with other European holdings. Locally, in *Voreia Ellada*, holdings growing tobacco are larger than other holdings in the same area.

In Spain and Greece, other industrial crops are grown alongside tobacco, particularly in non-specialist holdings. *Campania* is the only region that grows tobacco as the sole industrial crop.

Irrigation is a common feature of tobacco holdings in *Campania* and *Extremadura*, but is rare in Greece, even though almost three-quarters of UAAs in the region are irrigable. This explains the importance of grain maize as a crop, which also responds well to irrigation. Specialist tobacco holdings obviously devote irrigable land to tobacco rather than to maize, though the latter is nevertheless significant.

Finally, in *Extremadura*, production of tobacco, fruit and vegetables, all of which are highly dependent on low-skilled labour, are often combined.

Box 2: Varieties and drying methods

The groups of varieties defined by legislation correspond, as their names suggest, to combinations of varieties and drying methods. There is no strict link between drying method and variety. Drying may be done in an oven (flue cured), in the air (light or dark air cured, for light or dark tobaccos), by smoking (fire cured, for cigars and pipe tobacco) or in the sun (sun cured, to enhance the flavour).

The volume of labour depends on the level at which leaves are to be picked, and on the quality of the tobacco itself.

Variety	**Virginia** The most common variety (60% of world production)	**Burley**	**Oriental** 8% of world production
Colour	Blonde	Light	
Flavour	American	American	aromatic
Preferred drying method (cf. Table Box 3)	I. Flue-cured	II. Air cured	VI. VII. and VIII.
Growing requirements : Soil fertility Temperature Humidity	 - + +	 + + ++	 -- ++ -
Cropping: Density (plants/ha) Yields	 15 000 → +		 100 000 -
Drying	6-8 days	21-35 days	14-21 days

Characteristics of the three major varieties of tobacco

Box 3: Varieties and guarantee thresholds

Legislation defines volume-based guarantee thresholds for each group of variety (Box 4) and by Member State (within production areas). The table below shows the main elements taken into account by producers. Yields and premium per kilo of raw tobacco make for a higher premium per hectare in group II (1.6 times that of group VI). The sales price for the latter is more attractive. In Greece in 1998, the average market price was 77% of the premium for Basma, as opposed to 20% for Burley and 21% for Virginia. This price is not known at the time the variety is chosen. Falling prices (-3% per year for Burley, -5% for Basma, -26% for Virginia between 1996 and 1998) have prompted growers to opt for the security of the premium rather than the uncertainty of changes in rates between varieties.

	Yield. q/ha[a]	% guar. Prod.[b]	% eligible AL[c]	location	Primium/kg[d] (max=100)	variable % (2000)[e]
I. Flue cured	28	36.1%	55.4%	D, EL, F, I, E, P, A	72	25%
II. Light air cured	36	21.7%	51.9%	B, D, EL, F, I, E, P, A	58	25%
III. Dark air cured	26	12.5%	52.5%	B, D, F, I, E, A	58	25%
IV. Fire cured	24	2.1%	3.7%	I, E	63	25%
V. Sun cured	24	7.7%	1.0%	EL, I	58	35%
VI. Basmas	13	7.5%	1.5%	EL	100	20%
VII. Katerini and similar	18	6.5%	1.5%	EL	85	20%
VIII. Kaba Koulak (classic), Elassona, Myrodata d'Agrinion, Zichnomyrodata	20	5.9%	1.2%	EL	61	20%

[a] Yield: average yield of raw tobacco over the three-year period 1997-99, in quintals (100 kg) per hectare

[b] % guar.prod.: percentage of volume of raw tobacco (in tonnes) guaranteed for each group of varieties for the 1999 crop year (EC 660/1999)

[c] % eligible AL: percentage of arable land in the production area under investigation (EC 2848/98) according to the 1997 SSAH.

[d] Premium/kg: premium per kg of leaf tobacco (1999 to 2001 harvests), as a percentage of the maximum value (€ 4.12957/kg), pursuant to Regulation 2848/98. A supplement of up to € 0.88/kg may be paid for certain varieties of tobacco in Belgium, Germany, France and Austria.

[e] variable %: variable part of the premium in 2000. This is greater for groups where improvement is a priority.

Complex crop choices

The choice of tobacco variety (Box 2) determines the economic yield of production. Thus, expected yields of Burley are around three times higher than those of Basma for unit prices that are lower by a third and a premium that is almost half the amount. Basma is thus preferred to Burley where a choice is possible (Greece). However, where conditions are less favourable, premium and guaranteed quantity prompt the production of more run-of-the-mill tobacco in terms of quality.

Marked regional trends

Differences in the commercial and regulatory conditions under which tobacco is farmed (national variations, crop varieties) have given rise to distinct trends. Comparisons of the number of holdings growing tobacco, holdings specialising in tobacco and holdings as a whole at regional level in 1989/90 and 1997 reveal a number of clear trends (Fig. 5):

- **development**, in certain regions (*Vlaams Gewest en Brussel*, mainland Greece except *Ipeiros*, *Extremadura*, *Picardie*, *Poitou-Charente*, *Campania*, *Toscana*, *Friuli-Venezia Giulia*), where the percentage of holdings growing tobacco is rising;

- **specialisation** in *Région Wallone*, *Ipeiros*, *Andalucia*, *Castilla-León*, *Rhône-Alpes*, *Umbria*, *Lazio*, *Abruzzi*, *Puglia*, where the percentage of holdings specialising in tobacco is increasing, in spite of a fall in the percentage of holdings growing tobacco;

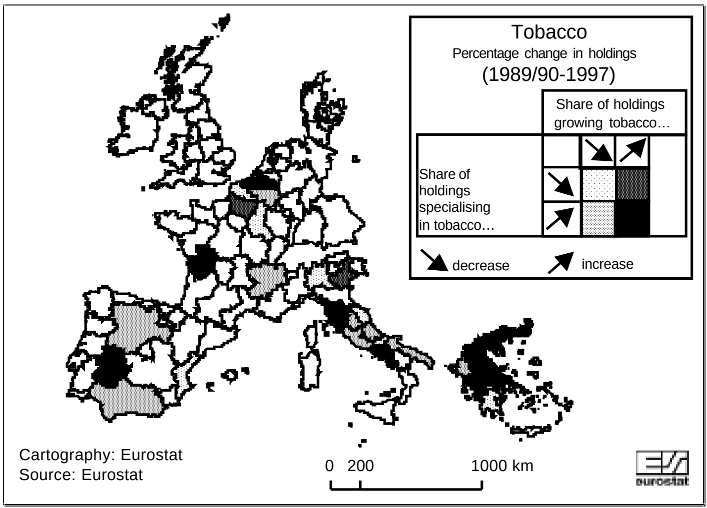

Figure 5: Regional changes in holdings growing tobacco

- **fall** in the percentage of holdings growing tobacco and specialist holdings in *Peloponnisos*, *Comunidad Valenciana*, *Nord-Pas-de-Calais*, *Champagne-Ardenne*, *Lombardia*, *Marche*, *Molise.*

There is a direct correlation between changes in the number of holdings/areas under tobacco and the level of public support for production (Box 4). The effectiveness of measures can be gauged from the level of employment in holdings and, to a lesser extent, in the tobacco industry. The planned improvement in the quality of tobacco (introduction of the variable part of the premium, then an increase in its weight, this being dependent on quality) should not only push up sales prices but also increase employment on holdings. Lower yields and a greater demand for labour per crop hectare go hand in hand here. Producer groups are the vehicles of this policy.

Encouraging tobacco producers to convert to other types of production (fruit and vegetables, maize, etc.) would not provide them with the same return on their land - it would merely increase production in areas showing surpluses or already subject to quotas.

Box 4: Tobacco and legislation

The common organisation of the tobacco market was achieved in stages, as follows:

Regulation 727/70: common organisation of the market in raw tobacco
This operates by means of norm and intervention prices. A premium is paid to operators supplying processors (purchases of raw tobacco and producers selling it directly). The premium is contingent upon a cultivation contract with the producer. Incompatibility with monopolies is stated. A tobacco management committee is set up.

Regulation 2075/92: marketing of quality tobacco

- Gearing of production towards quality: (i) different premium for each of the 8 groups of variety, (ii) aids to help producers switch to other varieties, (iii) aid to groups of producers (funding up to a maximum of 10% of the premium), the overall object being to improve quality.
- Structuring supply: (i) cultivation contracts, (ii) (volume) threshold guarantees by Member State and group of variety, (iii) structuring of supply by producer groups.
- Horizontal measures: (i) setting-up of a Community fund for tobacco research and information, (ii) monitoring of application of the Regulation by the Member States.

Regulations 3290/94, 711/95, 415/96: production quotas
The restrictions imposed by the GATT agreements are incorporated into the common organisation of the tobacco market. Introduction of production quotas (equivalent to guarantee thresholds), but exceptional intervention in the market remains possible (3290/94). Surpluses (up to 10% of the quota) may be carried over from one harvest year to the next (711/95, repealed by 2848/98). Quotas may also be transferred from one group of varieties to another, provided neither the quota in tonnes nor the EAGGF premium entitlements are exceeded (415/96).

Regulation 1636/98: summary and legal clarifications
Minimum quality specifications are defined, as are production areas. A clear description is given of procedures (authorisation, control, quota management, measuring methods, finance, timetable).
In order to improve financial efficiency, a variable part of the premium (increasing over time) is made dependent on the quality of tobacco. Production of tobacco outside the Mediterranean is geared towards "flue cured" and "light and dark air cured" (groups I, II and III). Specific aid for groups of producers is varied by Member State to take account of cost differences caused by production density.
Cultivation contracts may be put up for auction.

Regulation 2848/98: structuring groups of producers
Non-reversible reduction of variety production areas. Member States set up national quota reserves by buying back from producers. Quotas are represented by a statement. The information declared is recorded in an IACS. The financial structure of producer groups (guarantee) allows advances to be paid on premiums.
Lastly, the Community Tobacco Fund is helping with measures to discourage smoking (1648/2000).

This legislation is not at odds with current health policy, since (i) the industry must look for ways of reducing the harmfulness of tobacco and (ii) only 20% of the tobacco consumed in the European Union comes from the Community (so any reduction in production would be offset by an increase in imports).

Box 5: Sources of information on tobacco cultivation

1 – The **Survey on the Structure of Agricultural Holdings** (SSAH) records information at regional level, including information on areas under tobacco and holdings specialising in the cultivation of tobacco. It is conducted as a census every ten years, intermediate surveys being carried out every two to three years on a representative sample of agricultural holdings.

2 – In accordance with the Regulation on the common organisation of the tobacco market, Member States forward information on its application to **DG Agriculture**. This information is broken down by regulated group of variety.

3 – **Professional operators** in the sector collect information on the tobacco market and tobacco cultivation to meet their own needs. They disseminate this, providing details of the different varieties and farming methods. This information also gives an indication of the concerns of professional operators.

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