Statistics in focus

AGRICULTURE AND FISHERIES

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Contents

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Structure of agricultural holdings in the EU
Olive groves

Pol MARQUER

Olive oil and table olives come primarily from Spain, Greece and Italy, but also from Portugal and France. The European Union, which is easily self-sufficient, accounts for three quarters of world production of olive oil and 40% of world production of table olives (box 1 page 6).

According to the 1999/2000 survey on the structure of agricultural holdings[1], there are about 2 million holdings involved in growing olives. They account for 60% of Greek holdings and about 40% of the holdings in Spain, Italy and Portugal (Table 1).

Olive-growing holdings are generally small in size (2 ha of olive groves on average). They are bigger in Spain (4.6 ha) and much smaller in Greece (1.5 ha) and Italy (1.1 ha). In Spain olive groves of 5 ha or bigger account for 72% of the total area under olives, compared with 25% in Greece.

About half of the holdings with olive trees rely on them for more than two thirds of their standard gross margin (SGM) and are thus considered *specialist olive-growing holdings*. For one in every three the figure is more than 90% (Figure1).

The cultivation area of olive trees matches the Mediterranean climate zone. Their presence therefore comes as no surprise. Olive-growing contributes locally to more than half of the agricultural gross margin in the south of Italy, the Greek islands, the south of the Peloponnese and the centre of Andalusia (page 4).

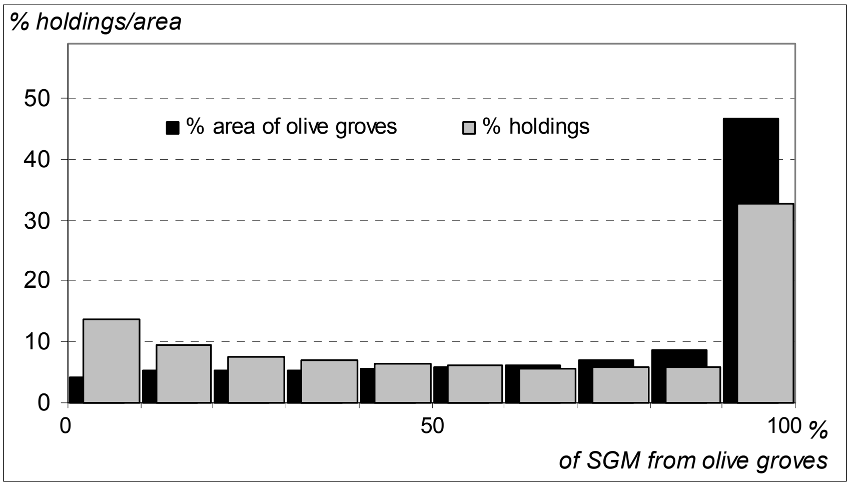

Figure 1: Breakdown of EU olive-growing holdings and areas according to the degree of olive specialisation of holdings (cf. page 6)

[1] *Words underlined in the text are explained on page 7.*

Table 1 – Holdings with olive groves

		EU-15	GR	ES	FR	IT	PT
Number of holdings	(1000)	**2 064**	**492**	**478**	**12**	**923**	**159**
- % of all holdings	(%)	30	60	37	2	43	38
- in less favoured areas	(%)	62	61	81	40	49	86
Total labour force	(1000 AWU)	**1 343**	**324**	**298**	**14**	**529**	**178**
- per holding	(AWU)	0.65	0.66	0.62	1.16	0.57	1.12
- family labour force	(%)	78	86	63	50	83	79
Agricultural area	(1000 ha)	**15 935**	**1842**	**7 748**	**145**	**4 232**	**1 968**
- per holding	(ha)	7.7	3.7	16.2	12.3	4.6	12.4
- owner farmed	(%)	78	82	75	61	84	76
- on less favoured areas	(%)						
Area under olives	(1000 ha)	**4 297**	**737**	**2 220**	**14**	**990**	**335**
- per holding	(ha)	2.08	1.50	4.64	1.21	1.07	2.11
- normally producing table olives	(%)	6.9	11.3	8.3	:	1.8	3.2
- normally producing olives for oil	(%)	93.1	88.7	91.7	:	98.2	96.8
Breakdown of holdings by size of olive groves (%)							
- less than 0.5 ha		34	29	16	42	48	32
- from 0.5 to less than 1 ha		21	23	13	24	23	26
- from 1 to less than 2 ha		22	24	26	19	18	20
- from 2 to less than 5 ha		16	20	25	11	9	14
- 5 ha or more		7	5	20	4	3	7
Breakdown of olive grove areas by size (%)							
- less than 0.5 ha		4	5	1	9	10	3
- from 0.5 to less than 1 ha		7	10	2	13	14	9
- from 1 to less than 2 ha		14	22	8	20	22	13
- from 2 to less than 5 ha		22	38	17	26	23	20
- 5 ha or more		53	25	72	32	30	55
Economic size	(ESU/holding)	7.3	5.8	11.1	25.3	6.2	5.2
Breakdown of holdings by type of farming – and size of olive groves							
Holdings with olive groves	(1000)	**2 064**	**492**	**478**	**12**	**923**	**159**
- specialist olive-growing holdings – FT 33	(%)	46	59	48	28	44	19
- other holdings specialising in permanent crops – FT 31, 32 and 34	(%)	27	18	31	51	28	34
- mixed-cropping holdings – FT 60	(%)	12	9	9	9	14	20
- other types	(%)	15	14	12	13	15	27
Holdings with olive groves < 5 ha	(1000)	**1 909**	**468**	**385**	**11**	**898**	**148**
- specialist olive-growing holdings – FT 33	(%)	44	58	43	27	43	17
- other holdings specialising in permanent crops – FT 31, 32 and 34	(%)	28	18	35	51	29	35
- mixed-cropping holdings – FT 60	(%)	12	10	8	9	14	21
- other types	(%)	15	15	13	13	15	27
Holdings with olive groves >= 5 ha	(1000)	**154**	**24**	**94**	**0**	**25**	**11**
- specialist olive-growing holdings – FT 33	(%)	69	80	71	43	67	33
- other holdings specialising in permanent crops – FT 31, 32 and 34	(%)	12	9	11	33	16	23
- mixed-cropping holdings – FT 60	(%)	9	6	10	8	10	13
- other types	(%)	9	6	8	16	7	30

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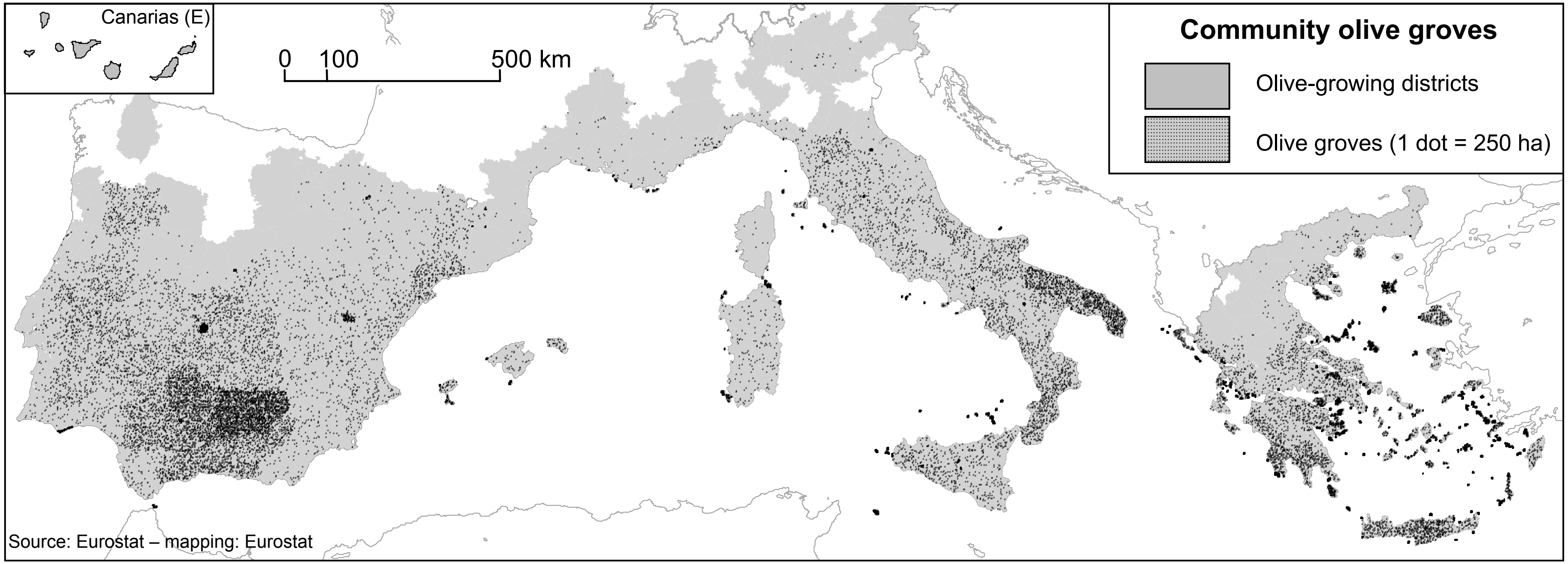
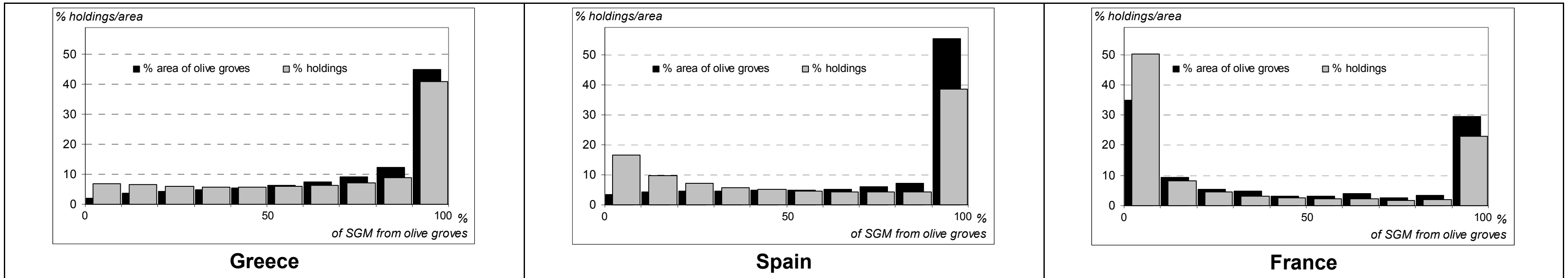


Map 1: Community olive groves (1999/2000 survey)



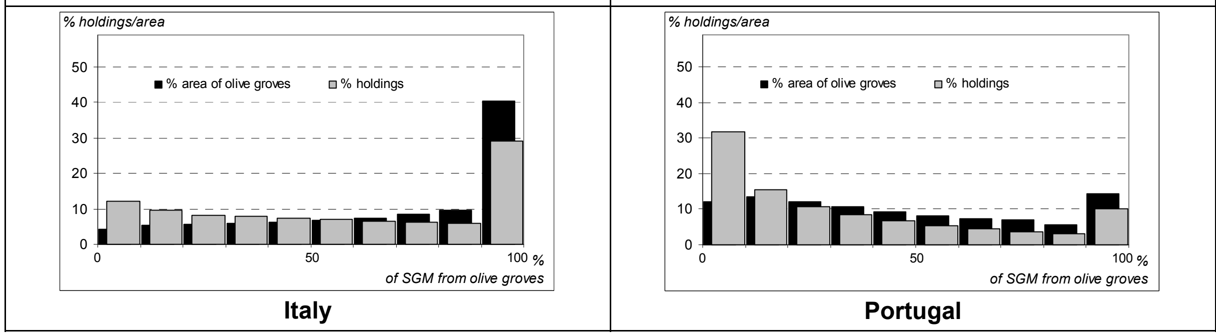
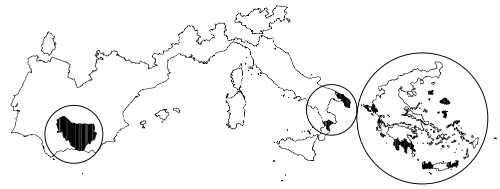


Figure 2: Breakdown of EU olive-growing holdings and areas according to the degree of olive specialisation of holdings*

*** contribution of olive groves to SGM of holdings**

Table 2 – Districts heavily dependent on olive cultivation
(SGM from olive growing accounting
for more than half of regional SGM)



Districts	Heavily dependent on olive cultivation*						All
	Greece*		**Spain***		**Italy***		**EU**
Description							
- Holdings in less favoured areas (%)	68.9		91.5		13.8		53.9
- Holdings with olive groves (%)	94.0		81.7		81.0		30.5
- Contribution of olive groves to SGM (%)	73.6		85.0		67.5		5.0
- Contribution of olive groves to AA (%)	50.2		42.7		49.5		3.4
- Olive groves producing table olives (%)	1.7		1.4		0.9		1.4
Holdings with and without olive groves	**Without**	**With**	**Without**	**With**	**Without**	**With**	**With**
Number of holdings (1000)	**9.4**	**146.9**	**30.5**	**136.4**	**24.5**	**104.7**	**2 063.6**
- with olive groves of more than 5 ha (%)	-	7.7	-	32.7	-	4.6	7.5
- FT 33 (%)	-	74.7	-	85.1	-	72.8	46.3
Area of olive groves (1000 ha)	**-**	**283.4**	**-**	**1 044.5**	**-**	**169.8**	**4 296.9**
- contribution to AA (%)	-	56.8	-	63.8	-	59.7	27.0
- FT 33 (%)	-	92.9	-	82.1	-	82.1	64.5
Labour force (1000 AWU)	**5.7**	**91.8**	**24.7**	**81.0**	**12.0**	**51.5**	**13 428.7**
- family (%)	90.9	86.0	61.0	47.4	67.8	72.7	78.5
- regular non-family (%)	0.6	0.4	12.9	5.7	2.8	1.1	4.5
- other (seasonal) (%)	8.5	13.6	26.1	46.8	29.4	26.2	17.1
- per holding (AWU)	0.60	0.63	0.81	0.59	0.49	0.49	0.65
Agricultural area (1000 ha)	**65.8**	**498.8**	**810.8**	**1 636.2**	**59.0**	**284.2**	**15 934.6**
- owner farmed (%)	48.6	85.6	69.1	79.6	89.7	91.2	42.2
- per holding (ha)	6.0	3.4	26.6	12.0	2.4	2.7	7.7
Total SGM (1000 ESU)	**39.8**	**854.1**	**360.4**	**1 939.4**	**108.8**	**565.2**	**14 968.0**
- per holding (ESU)	4.2	5.8	11.8	14.2	4.4	5.4	3.6
- per AWU (ESU)	7.0	9.3	14.6	23.9	9.1	11.0	11.1

* The survey districts where the SGM of olive groves accounts for more than half of total SGM are:
- *Thesprotia* (GR212), *Zakynthos* (GR221),), *Kerkyra* (GR222), *Lefkada* (GR224), *Lakonia* (GR254), *Messinia* (GR255), *Lesvos* (GR411), *Samos* (GR412), *Chios* (GR413), *Lasithi* (GR432) et *Chania* (GR434) in Greece,
- *Córdoba* (ES613), *Granada* (ES614) et *Jaén* (ES616) in Spain,
- *Brindisi* (IT914), *Lecce* (IT915) et *Catanzaro* (IT933) in Italy

Map 1 shows an irregular distribution of olive groves in the Mediterranean zone. They are of marginal significance in northern olive-growing areas but seem to be of major importance in certain other areas.

Of the 507 districts which are used for the survey on structure of agricultural holdings in EU-15, there are 218 with olive groves. In one district out of nine (56), more than 20% of SGM comes from olive cultivation. These districts cover 6.5% of Community AA for about two thirds (61%) of olive groves. Among these districts, 17 are heavily dependent on olive-growing, with olive production accounting for more than half of SGM (Table 2). They account for only 2.6% of Community AA but more than a third (35 %) of olive groves. They match the areas in Map 1 where there is a strong presence of olive cultivation.

More than half of the AA is planted with olive trees and more than four out of five holdings cultivate olives.

The low average figures for AA (7.7 *vs* 18.7 ha), economic size (7.3 *vs* 18.7 ESU) and labour force (0.65 *vs* 0.94 AWU) is related to the location of olive-growing holdings. Locally, neighbouring holdings without olive trees are also smaller in economic terms.

Owner farming is still more significant than in the case of other holdings.

There are, however, other differences affecting the major areas of olive cultivation.

- In Spain, the large farms are very specialised and family workers account for less than half of the labour force.
- In Greece, olive cultivation dominates in the areas involved: only one holding in 20 and one AWU in 20 are not involved in olive-growing.
- In Italy, small olive-growing holdings are big compared with neighbouring holdings.

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Degree of specialisation olive cultivation among holdings (contribution of olive groves to economic size)

Olive-growing AA or the proportion of AA taken by olive groves are not enough to distinguish the dependence of olive-growing holdings on such production. However, olive groves in relation to economic size is a more revealing feature (Figure 1 page 1 and Figure 2 page 3, Tables 3 and 4 page 5). Their relative size, divided into classes, is called the *degree of specialisation*.

Two groups of olive-growing holdings can be distinguished (Table 3), depending on whether olives represent less than 50% or more 90% of economic size. The largest olive groves are not in the largest olive-growing holdings. This comparison also shows that less specialised holdings have a greater variety of outlets and account for a larger proportion of table olives.

Figures 1 and 2 show that specialisation reaches at least 90% in about a third of olive-growing holdings in the Community (41% in Greece), accounting for about a half of olive groves (55% in Spain). This intense specialisation is of course common to all permanent crops, but in the case of olive groves it applies to one in every 10 holdings in EU-15 (Table 5).

Table 3 – Breakdown of holdings by degree of olive-growing specialisation

Contribution of olive groves to SGM ↓		EU-15	GR	ES	FR	IT	PT
Holdings	>0 < 50 %	43.9	31.0	44.0	68.7	45.3	72.8
	50 % - < 2/3	9.8	10.0	7.5	3.7	11.2	8.7
	2/3 – 90 %	13.7	18.0	10.0	4.6	14.4	8.4
	>= 90 %	32.6	40.9	38.4	22.9	29.1	10.2
	Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Area of olive groves (ha)	>0 - <50 %	25.6	20.1	21.6	57.7	27.4	57.6
	50 % - < 2/3	9.8	11.0	8.3	6.1	11.5	13.0
	2/3 – 90 %	17.7	24.0	14.9	6.8	20.7	14.9
	>= 90 %	46.8	44.9	55.2	29.4	40.5	14.5
	Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Graph form figures 1 (page 1) and 2 (page 3)

Table 4 – Description of holdings by degree of olive-growing specialisation
(average figures per holding)

Contribution of olive groves to SGM ↓		EU-15	GR	ES	FR	IT	PT
Agricultural area (ha)	>0 - <50 %	12.4	6.8	25.0	16.9	7.3	15.0
	50 % - < 2/3	5.3	3.7	13.7	4.8	3.0	6.6
	2/3 – 90 %	4.7	3.0	12.6	3.1	2.9	5.9
	>= 90 %	3.4	1.7	7.6	1.8	1.8	3.9
	Overall	**7.7**	**3.7**	**16.2**	**12.3**	**4.6**	**12.4**
Area of olive groves (ha)	>0 - <50 %	1.2	1.0	2.3	1.0	0.6	1.7
	50 % - < 2/3	2.1	1.6	5.1	2.0	1.1	3.2
	2/3 – 90 %	2.7	2.0	6.9	1.8	1.5	3.7
	>= 90 %	3.0	1.6	6.7	1.6	1.5	3.0
	Overall	**2.1**	**1.5**	**4.6**	**1.2**	**1.1**	**2.1**
Labour force (UTA)	>0 - <50 %	0.89	1.08	0.79	1.52	0.76	1.28
	50 % - < 2/3	0.58	0.73	0.56	0.50	0.48	0.84
	2/3 – 90 %	0.55	0.61	0.58	0.42	0.47	0.75
	>= 90 %	0.39	0.34	0.45	0.34	0.38	0.49
	Overall	**0.65**	**0.66**	**0.62**	**1.16**	**0.57**	**1.12**
Contribution of family workers to labour force (% AWU)	>0 - <50 %	79.4	86.6	69.1	45.8	83.0	78.2
	50 % - < 2/3	83.4	88.3	65.7	78.7	86.4	86.0
	2/3 – 90 %	80.6	87.2	60.1	84.5	83.6	82.8
	>= 90 %	72.0	82.0	50.3	83.6	81.9	84.2
	Overall	**78.5**	**85.9**	**62.8**	**49.5**	**83.2**	**79.2**
Proportion of olive groves producing table olives among all olive groves (%) (excluding France)	>0 - <50 %	8.8	15.8	12.9	:	1.9	3.2
	50 % - < 2/3	7.9	8.6	12.4	:	1.9	3.8
	2/3 – 90 %	6.2	7.6	8.7	:	1.8	3.0
	>= 90 %	5.9	11.9	5.8	:	1.7	2.7
	Overall	**6.9**	**11.3**	**8.3**	**:**	**1.8**	**3.2**

Table 5 –Degree of specialisation for main permanent crops

Plantations of…	Fruit and berry trees (G/1)	Citrus (G/2)	Olive trees (G/3)	Vines (G/4)
Holdings with crops in EU-15				
Holdings with crops in EU-15 (%)	16	6	30	24
Area planted (%of Community AA)	1.5	0.4	3.4	2.4
'Specialist' holdings obtaining less than 2/3 of SGM among holdings with crops				
- Holdings (%)	29	48	46	31
- Area planted (%)	53	76	65	65
Holdings obtaining at least 90% of SGM among 'specialist' holdings				
- Holdings (%)	63	79	70	66
- Area planted (%)	64	80	73	69
Holdings obtaining at least 90% of SGM in EU-15				
- Holdings (% EU-15)	3.0	2.3	9.9	4.8
- Area planted (%of Community AA)	0.5	0.2	1.6	1.1

Box 1: Olive oil and table olive market

Production and consumption - The European Union produces about 45% (0.6 million tonnes) of the table olives and about four fifths (2 million tonnes) of the olive oil produced in the world. The significance of this production must be viewed in relation to a market which is limited (olive oil represents only 3% of worldwide production of vegetable oil) and localised (the countries around the Mediterranean account for 60% of consumption). At Community level, however, olives account for a fifth of all vegetable oil.

Common market organisation (CMO) for olive oil - The 2003/2004 marketing year is indicated by Council Regulation (EC) No 1513/2001 (OJ L 201 of 26 July 2001, pp. 4-7) as being the final year of a transitional period which began in 1998/99 with a view to reforming the CMO which started in 1966. The transitional period was intended to provide time to devise a strategy for the integrated management of the market and to prepare the necessary instruments, especially effective inspection tools (GIS). Price regulation involves maximum guaranteed quantities (MGQs) divided into guaranteed national quantities (GNQs). These quantities concern production which is actually placed on the market, rather than a widely spread potential production (from very small producers). Support for private storage replaces less efficient public intervention. Eligible quantities take into account olive residue oil and can also include table olive equivalents (1 kg of table olives corresponds to 100-130 g of oil). Eligible olive groves must data from before 1 May 1998. For the 2001/2002 marketing year, 2.7 million tonnes of olive oil thus benefited from production aid.

Producer associations and processors play an important role in this organisation. By distinguishing different oils (olive oil *vs* olive residue oil; virgin or crude *vs* refined olive oil; compound oils or not), it is possible to support quality production. This classification will enter into force on 1 November 2003.

The Commission has submitted a proposal for new olive oil support arrangements consisting in particular of transferring 60% of aid to the single payment mechanism and creating national envelopes to aid olive groves of particular environmental and social value [COM(2003)554 final].

Explanatory notes

Survey on the structure of agricultural holdings

The survey on the structure of agricultural holdings is held every ten years and supplemented by interim sample surveys. The last survey which has been published was the 1999/2000 census, the data of which are used here.

The survey records area under olives (G/3), subdivided into areas normally producing table olives (G/3a) and those producing olives for oil (G/3b). Nursery plantings of young trees which are not yet producing olives are not considered. The Member States may apply a survey threshold to eliminate the smallest holdings if their economic significance (measured as SGM) does not exceed 1% of the national total. Olive cultivation is very widespread and the survey may underestimate areas under olives. In addition, some of the areas are recorded under *kitchen gardens (E)* if the yield from the plot is primarily for own consumption (minimum recorded area is 1 are).

An **agricultural holding** is a unit, both technically and economically, which has a single management and which produces agricultural products.

The **agricultural area (AA)** is the total of arable land, permanent grassland, permanent crops and kitchen gardens.

For each type of production, whether animal or crop, a **standard gross margin (SGM)** is calculated on the standard value of production after deduction of specific direct standard costs, excluding labour, equipment and buildings. The sum of the SGMs of a holding's production is its **economic size**. This is expressed in **European size units (ESU)**, each corresponding to EUR 1 200 of SGM. The contribution of the various types of production to the economic size of a holding allows its **farm type (FT)** to be determined. If, for example, the production of *olive groves (G/3)* accounts for more than two thirds of the economic size of a holding, it is classified as a *specialist olive-growing holding* (FT 33).

The agricultural **labour force** of a holding consists of persons who have completed compulsory schooling (who have reached the age limit for compulsory schooling) and who, in the 12 months preceding the day of the survey, have performed agricultural work on the holding. The **family labour force** includes the operator of the holding, if he is a natural person, as well as his spouse and any other members of his family who work on the holding.

Individual working time is recorded as a percentage of the working time of a full-time worker. An **annual work unit (AWU)** is equivalent to the work performed by a full-time worker.

A Eurofarm **district** is a geographical unit used for publishing the results of the survey on the structure of agricultural holdings. In the case of the Member States where olives are cultivated, it corresponds to the NUTS-3 level.

ZPA1 data base

The **ZPA1** data base on crop products provides information on the areas, yields and production of each agricultural product. It also includes the utilisation balances of fats and oils, including olive oil.

The olive-growing areas in the survey on the structure of agricultural holdings are on average 8% smaller than those in the ZPA1 data base. The discrepancy increases with the percentage of small holdings, and this supports the theory that smaller areas are under-estimated in the structural survey. This difference is correlated at 84% with the percentage of holdings of less than 0.25 ha (from the structural survey).

Further information:

➢ **Databases**

NewCronos, Theme 5, Domains: eurofarm, zpa1

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