The European score-board – a comparison between EU-countries

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Introduction to LEI

- LEI is part of WUR = Wageningen University and Research Centre
- LEI is specialised in agricultural economics and social behaviour in agriculture at different levels:
  - Farm level
  - Sector level
  - Chain and network level
  - Agricultural policy
  - EU and global level → Score-board = comparison of agricultural sector in EU-15
- Bert Smit: Plant department, specialised in arable farming


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Introduction to research and presentation

- The report is written by Kees de Bont and other colleagues: specialists! Honour to them.
- Background: SWOT-analysis of developments in Dutch agriculture:
  - Strengths
  - Weaknesses
  - Opportunities
  - Threats
- Input for policy makers and others involved.
- Presentation: slides of comparison: agriculture in general and especially arable farming

Figure 2.2 Share of EU member states in the gross agricultural production value of the EU 15, “1994” and “2001” (%)

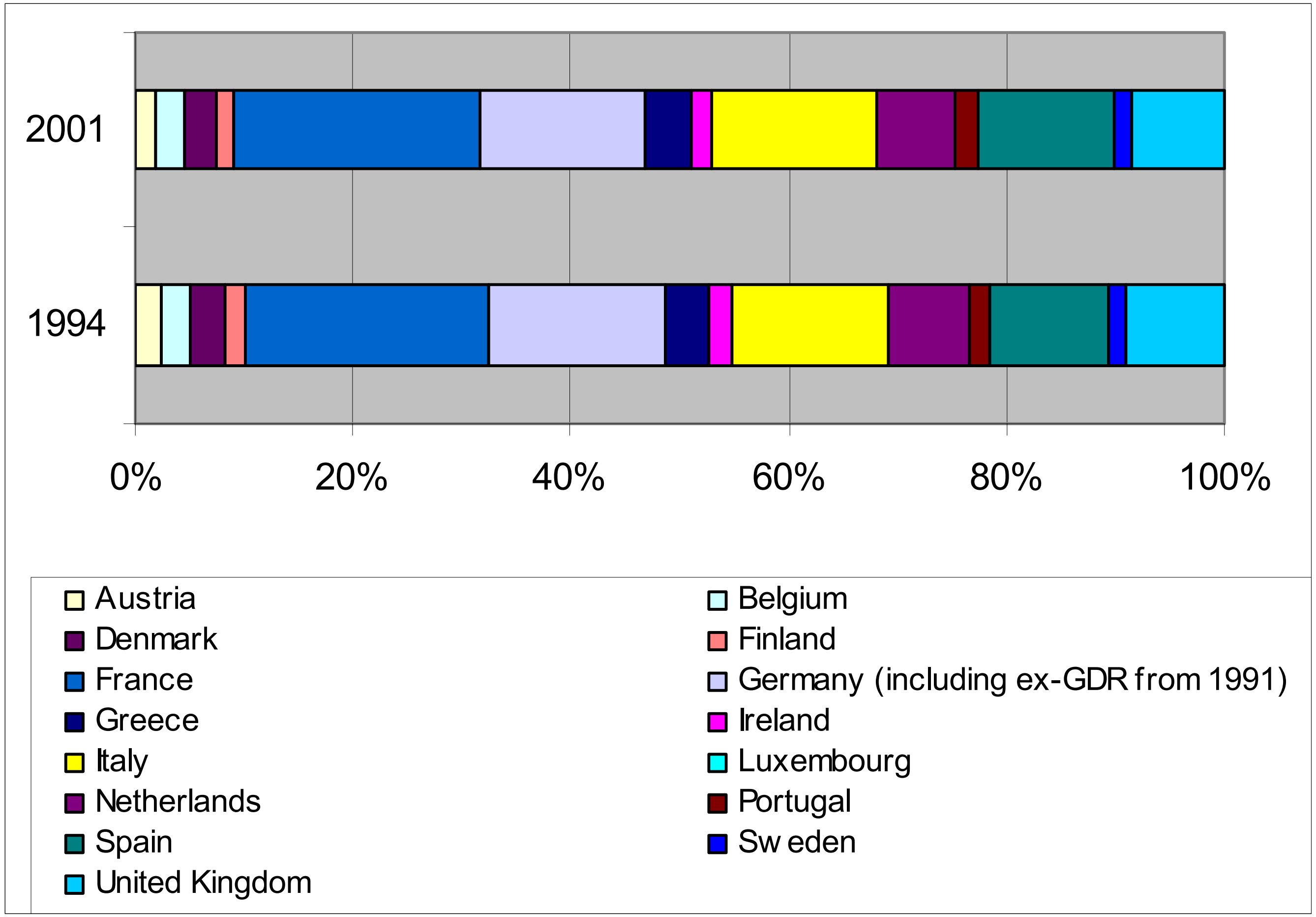

Figure 2.5 Scale of and developments in agricultural imports of the EU from the main countries of origin within the Union (in EUR billion)

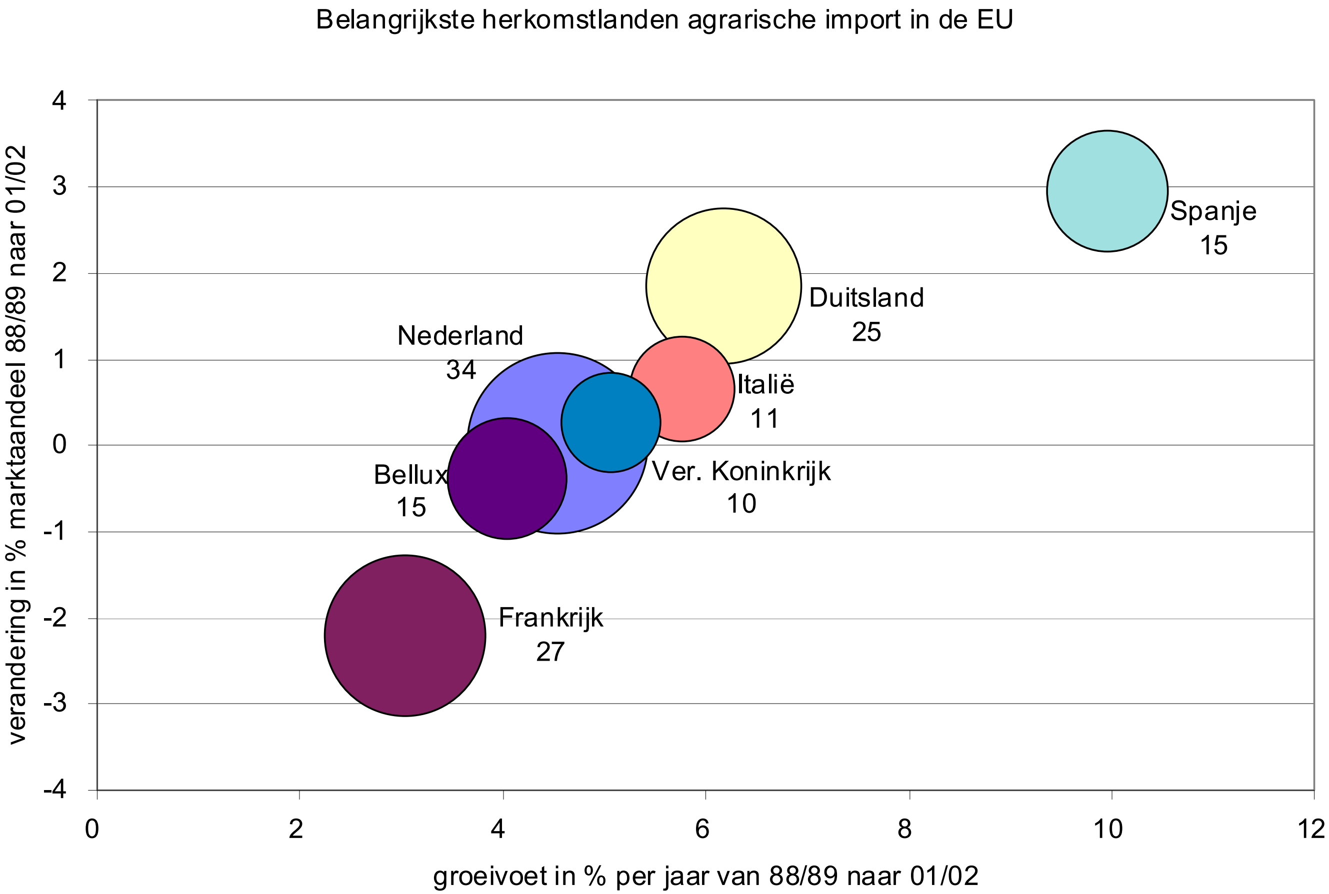

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Figure 2.7 Average farm size in the EU member states a), 1990-2000 (in hectares)

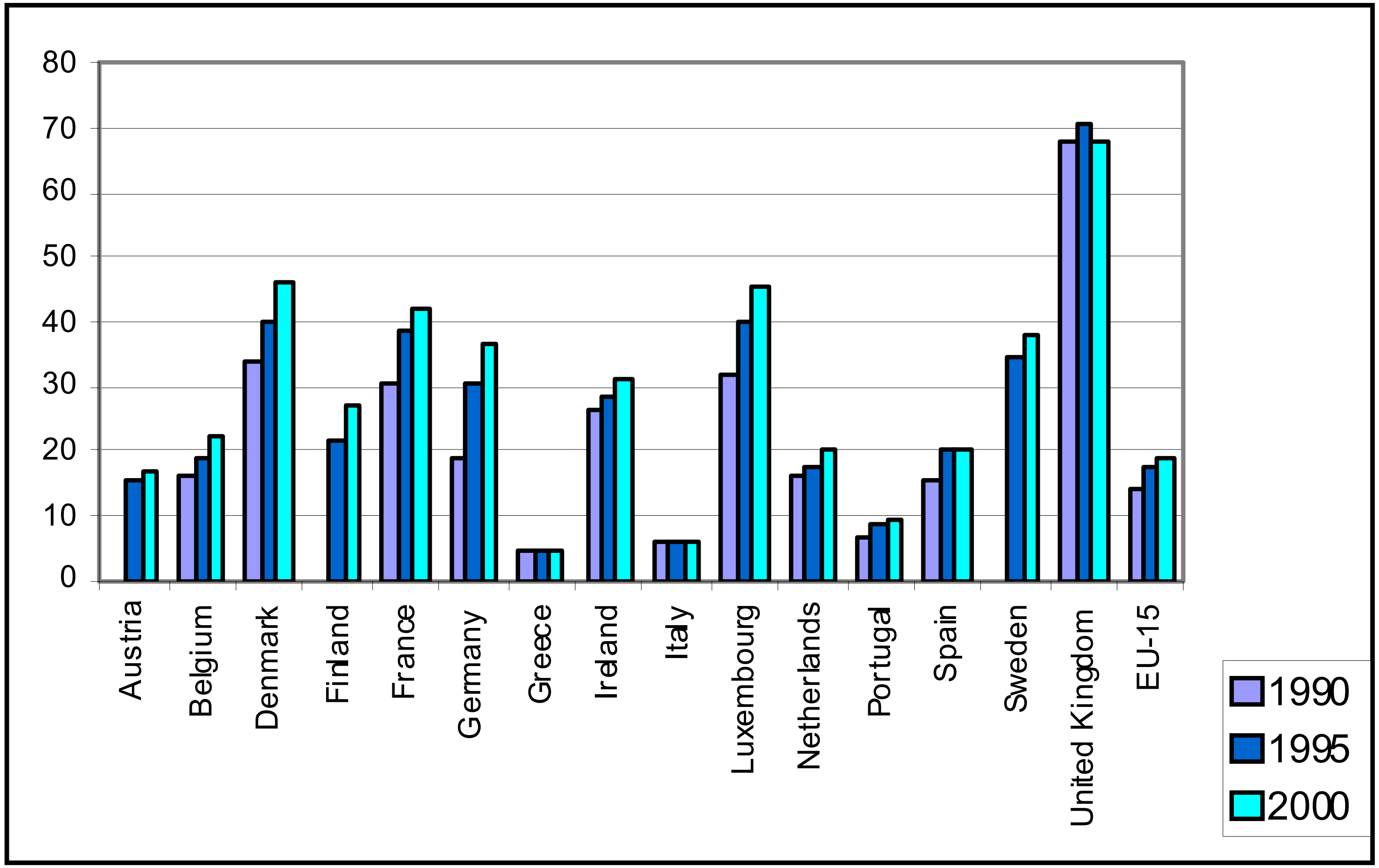


Figure 2.8 Average standard gross margins in European size units per hectare in the EU member states, 1990-2000

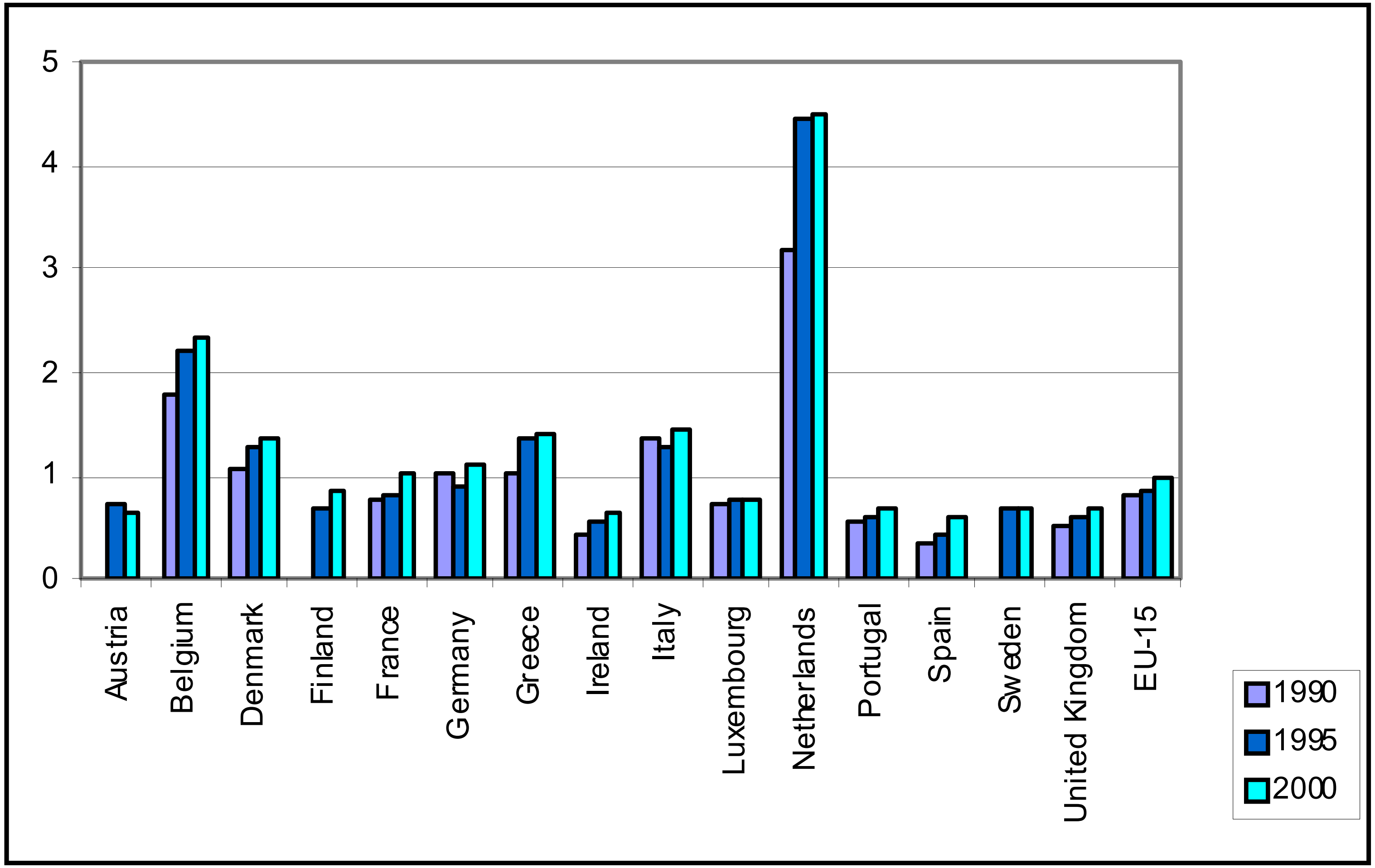


Figure 2.10 Change in family income from farm (x EUR 1,000) and farm size (in European size units) per member state, '1991' to '1999' (three-yearly averages).

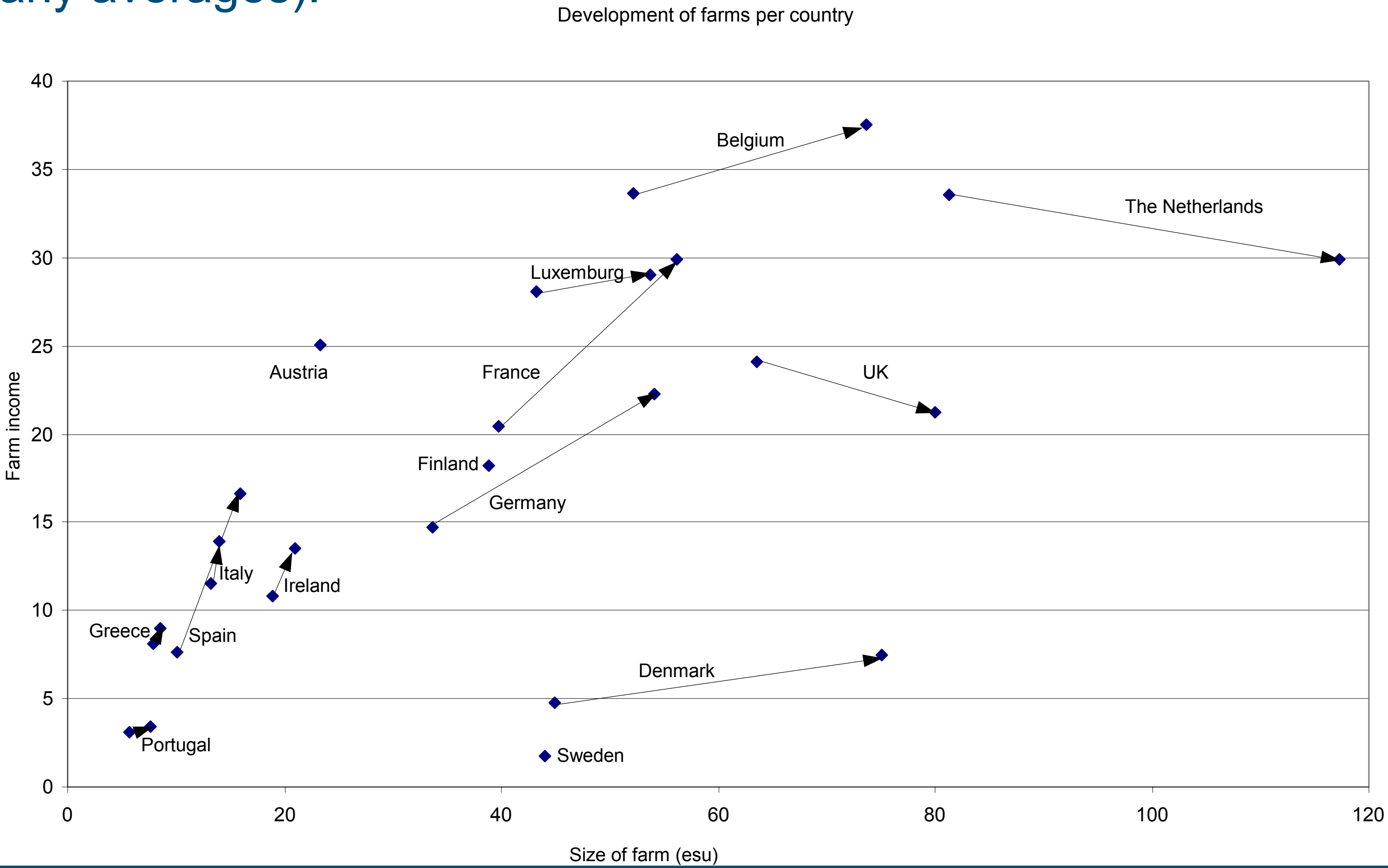


Figure 3.1 Scale of and development in % of EU imports of potatoes from the main countries of origin within the Union between 1988/89 and 2001/02

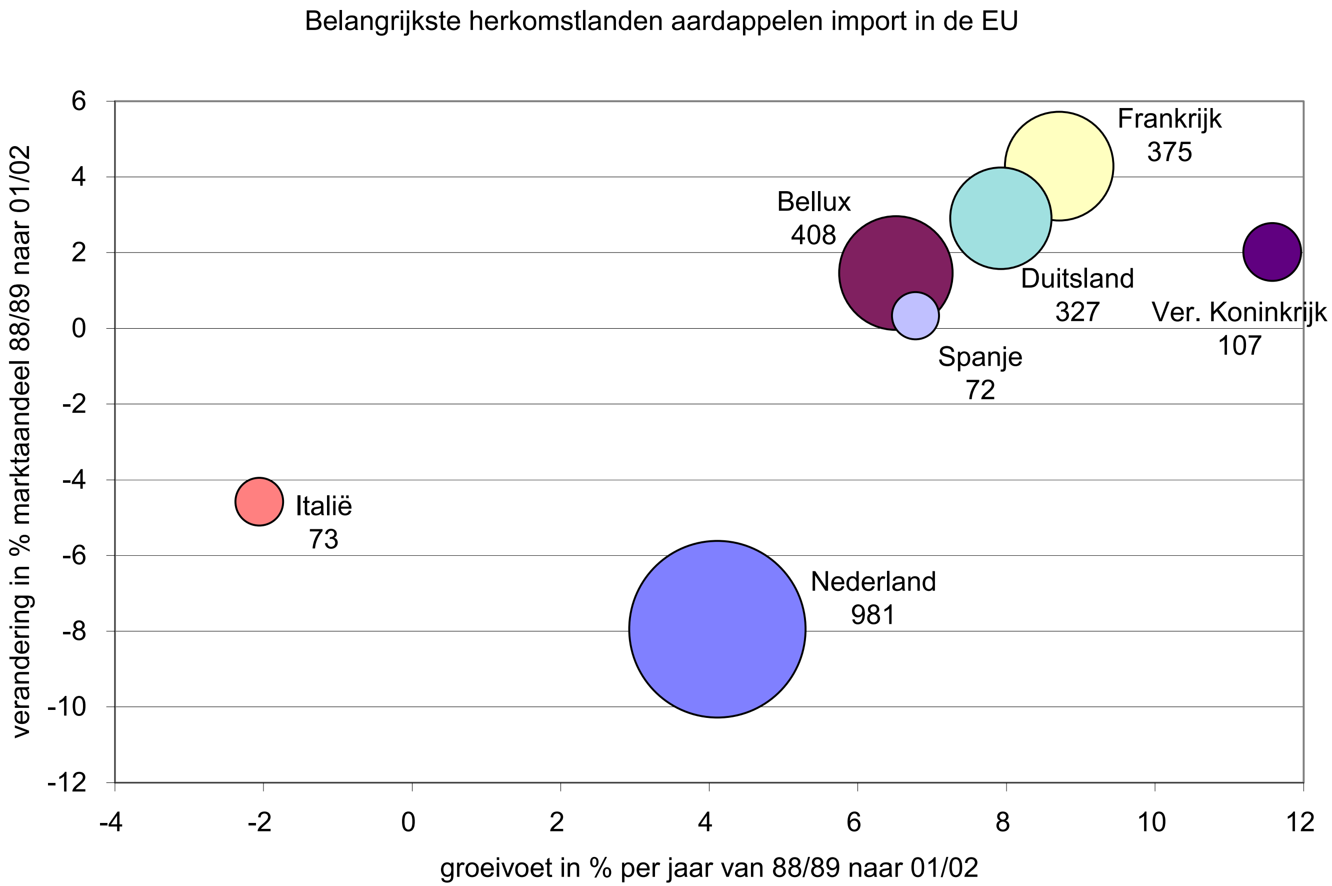


Table 3.4 Physical and monetary yields of grain and sugar beet per hectare, total yields and subsidies (average 1996-2000) for arable farms

Tabel 3.4 Fysieke en geldopbrengsten granen en suikerbieten per hectare, totaal opbrengsten en subsidies gemiddeld 1996-2000 op akkerbouwbedrijven

	granen (ton/ha)	suikerbieten (ton/ha)	granen (euro/ha)	suikerbieten (euro/ha)	opbr. per bedrijf (x 1.000 euro)	idem per hectare	subs. (x 1.000 euro)	Idem in %van opbr.
Duitsland	7,1	54,4	888	2.715	155	1.612	26,1	17
Frankrijk	7,6	73,4	855	2.668	137	1.419	33,0	24
België	8,4	64,2	1.002	2.851	113	2.191	9,6	8
Nederland	8,4	58,5	1.016	2.925	157	3.003	5,9	4
Denemarken	7,3	50,9	834	2.471	74	1.402	14,3	19
VK	8,1	50,2	955	2.332	227	1.416	49,0	22
Spanje	3,1	57,5	421	2.760	39	635	10,5	27

Figure 3.3 Composition of the costs and the margin on specialized arable farms (average 1998-2000); depreciation – interest/labour/rent - general

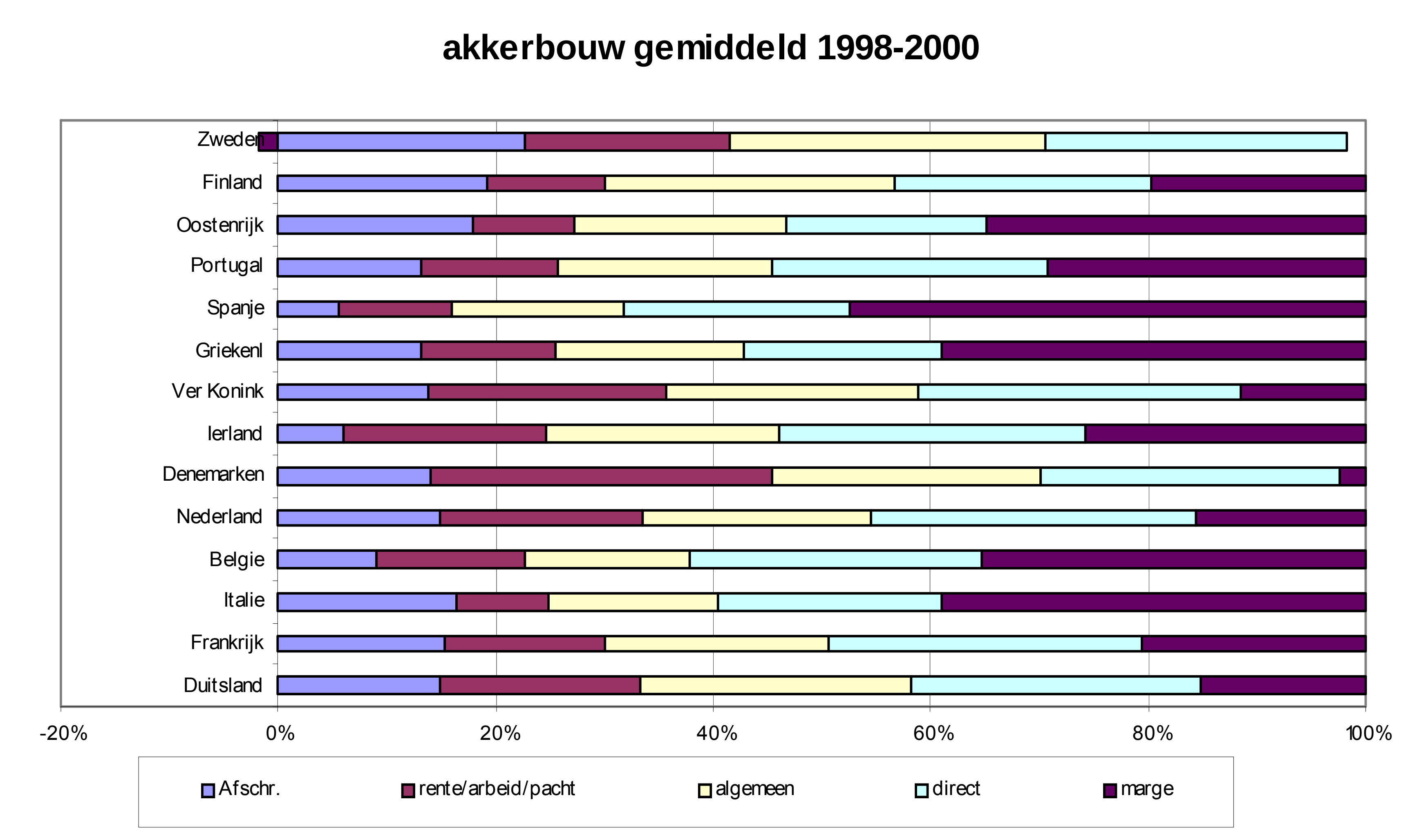
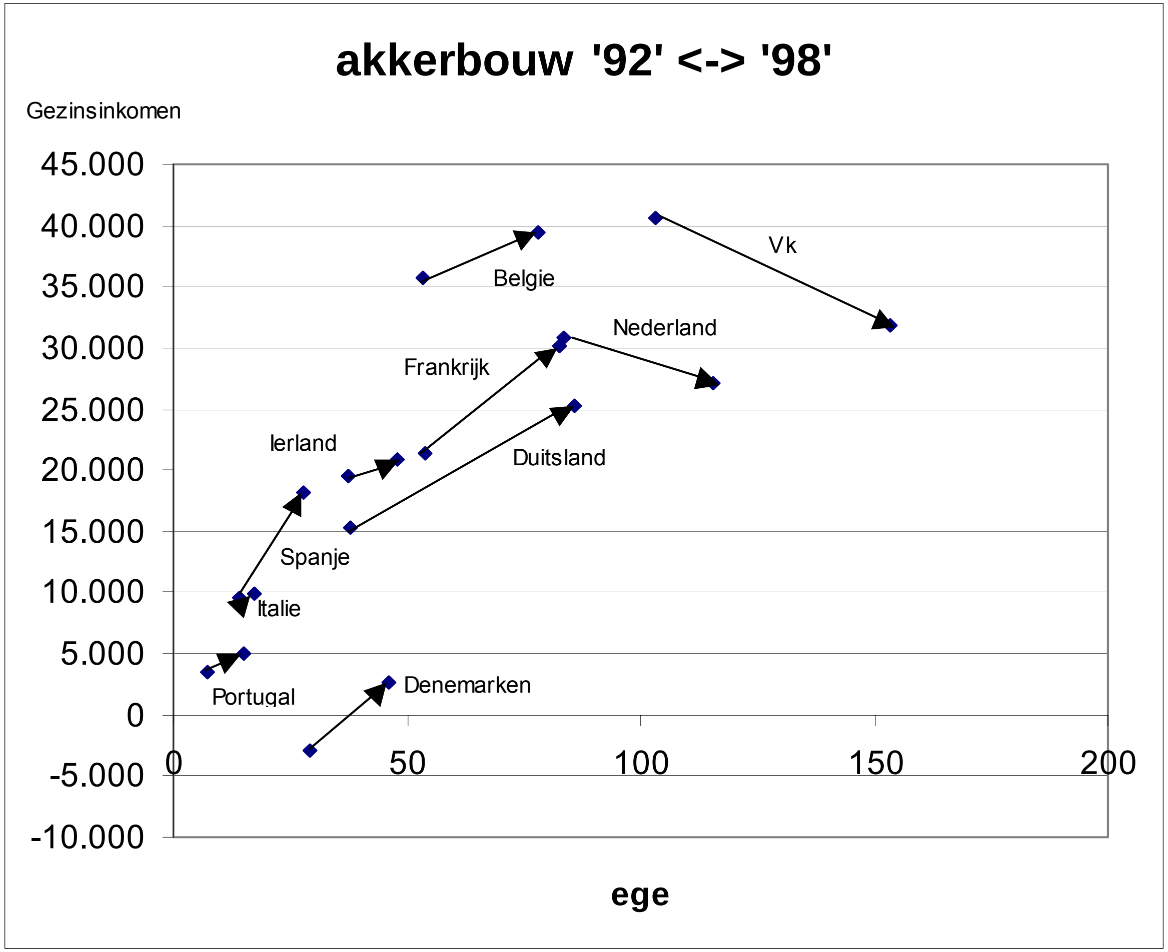


Figure 3.5 Development of family income and farm size between two five-year averages (1990-1994 and 1996-2000) specialized arable farms



Conclusions

- The farm sizes, market shares and farm incomes in EU-15 are rapidly changing → farmers, select and evaluate your strategy!
- EU-policy, WTO-negotiations, environmental and land use legislation put pressure on the arable sector → only innovative, adaptive and cost-effective and farmers will survive!
- EU15 becomes EU25 → threat or opportunities? Make up your mind!
- LEI is interested to facilitate farmers in strategic planning → mail: bertb.smit@wur.nl!

Thank you for your attention!