AGRICULTURE ATLAS
Facts and figures on EU farming policy 2019

REFORMS FOR A SUSTAINABLE FUTURE

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AGRICULTURE ATLAS

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Set in Brussels since the 1960s, the Common Agricultural Policy is one of the EU’s oldest policies. Despite its extensive funds and regular reforms every seven years, it is poorly attuned to the needs of Europe’s hugely diverse farm sector. Payments tied to area disproportionately benefit large, industrialized farms and promote productivity. Goals to minimize and adapt to climate change, protect the environment and promote rural development are poorly served.

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16 EU / DIRECT PAYMENTS
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18 EU / RURAL DEVELOPMENT
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The Common Agricultural Policy has two “pillars”, or pots of money to draw from. Pillar I, which consists largely of direct payments to farmers according to the area they manage, has come in for a lot of criticism. Pillar II, which supports rural development policy, is seen as more useful. But as the agriculture budget shrinks, it is Pillar II that faces the bigger cuts.

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26 POLAND / AGRICULTURAL STRUCTURES
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Like all industries, agriculture is subject to economies of scale. But larger farms have a smaller workforce and can be a bigger burden on the environment if they employ industrial methods, compared to the low-input systems that have traditionally dominated rural landscapes. It is time to shift policies towards preserving jobs and communities, being kinder on the environment, and encouraging young people to take up the farming profession.

30 GERMANY / FARM STRUCTURES
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34 EU / WORK
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Farm work is changing as capital replaces labour, and as paid employees replace family members. Where agricultural productivity is low, many farmers must look for outside work to make ends meet. Although small farms employ more workers, the Common Agricultural Policy supports large farms and does little to ensure decent pay or working conditions.

36 EU / LAND OWNERSHIP
FROM FAMILY FARM TO FARMING FIRM
Europe’s farms are getting bigger. Agriculture payments sparked a wave of land purchases in the new member states right after they joined the EU. Land prices have since increased steadily. Small and medium farms are being bought out by agribusiness and financial investors and are being replaced by large enterprises. The decline of family farming has major repercussions for rural society and the economy. Land ownership is now more highly concentrated than is overall wealth in the EU.

38 EU / BIODIVERSITY
INTENSIFICATION VS CONSERVATION
People often say that there are fewer
birds and insects now than there used to be. That is true, and intensive agriculture is largely to blame. Despite some lip service paid to the necessity of nature conservation, the overwhelming weight of European agricultural policy is to promote yet more intensification.

40 AUSTRIA / BIODIVERSITY
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42 ITALY / NATURA 2000
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44 SPAIN / HIGH NATURE VALUE FARMING
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46 EU / PESTICIDES
SPRAY TODAY, GONE TOMORROW
It is a common sight: a tractor with a big tank on the back and long booms stretching out on either side, moving methodically across the field. Farmers across Europe spray huge amounts of pesticides on their land in an attempt to control plant diseases, weeds and insect pests. This practice not only harms the environment; it is also unnecessary, wasteful and expensive.

48 EU / LIVESTOCK RAISING
FARMING AS IF ANIMALS MATTERED
Year by year, the EU makes large payments as direct per hectare premiums. But this money is required for the expensive, and badly-needed conversion of animal husbandry. The Common Agricultural Policy currently does little to improve conditions. This is true not only for small animal stocks, but also for larger ones. For many people in Europe it is important that the animals are kept well.

50 EU / FERTILIZER OVERUSE
TOO MUCH OF A GOOD THING
Applied in moderation, nitrates are good for agriculture. Nitrogen is a major plant nutrient and a key component of fertilizers. But an overabundance of nitrate is a menace. Plants cannot take up the huge amounts of N from fertilizer, manure or slurry spread on the land. The nitrates wash into rivers, lakes and the sea, where they cause algal blooms and fish die-offs. In drinking water, excess nitrates cause circulatory system problems. The EU recognizes the risks, but its institutions and member states’ governments do far too little to prevent them.
52 EU / ORGANIC FARMING
WORKING WITH NATURE
Rising demand for organic products in Europe is a market opportunity for producers and the food industry. But farmers need help to switch from conventional to organic, and to stay organic in face of market pressures inducing them to switch back. The Common Agricultural Policy offers some support – but not enough.

54 GERMANY / ORGANIC FARMING
ORGANIC GROWTH
Eco boom notwithstanding: EU farm subsidies are constraining the transformation of German agriculture. Brussels pays flat-rate area premiums directly, but the organic premiums must be subsidized by the state governments.

56 FRANCE / AGROECOLOGY
THE KEY TO SUSTAINABILITY
French agricultural policy has been guided by an agroecological project since 2014. But these good intentions are not reflected in the implementation of the Common Agricultural Policy. It is high time to put the focus on agroecology.

58 POLAND / LAND USE CHANGE
LOOKING BEYOND PRODUCTION
Producing high-quality food is an essential role of rural areas. But the countryside also has other important functions. It is home to many people, and plays a major part in maintaining the natural environment. Unfortunately, these functions do not get enough support in Poland.

60 EU / HEALTH
NEW POTATO, FRIED POTATO, COUCH POTATO
There is widespread agreement that health should be a pillar of the EU’s agricultural policy. But the transition towards a healthy and sustainable food system will not depend on the CAP alone. Sustainable production can be realized only in the framework of sustainable consumption.

62 EU / CLIMATE
PUTTING CARBON BACK IN THE SOIL
A changing climate has more impact on agriculture than any other human activity. But agriculture is also one of the main causes of climate change. Europe’s agricultural policies currently only pay lip-service to adaptation and mitigation in dealing with climate change. They should do a lot more.

64 EU / WORLD TRADE
A GLOBAL PRICE TAG FOR EUROPE’S AGRI FOOD SECTOR
Europe’s agriculture is part of many international value chains. It influences global commodity markets and thus the prices, products, income and diets in developing countries.

66 AUTHORS AND SOURCES FOR DATA AND GRAPHICS

70 ABOUT US
Europe’s culinary offerings are a joy to behold: mozzarella from Italy, mushrooms from Poland, olives from Greece, wine from France, bread from Germany, beer from the Czech Republic, ham from Austria. A huge range of specialties from a huge range of landscapes – each one shaped by its environment, climate, community and history. This is the taste of Europe.

No other economic activity is so closely interwoven with the human and natural environment as is agriculture. If farming changes, so too the ecological and social systems that it hosts must change. All over Europe, there is a shift in how the soil is managed and livestock are kept. In many places, farmers are throwing in the towel and giving up their farms. The remaining farms are getting bigger, and every patch of land is being used as intensively as possible.

The economy does not stand still, and economic sectors change as dynamically as does society itself. That is neither good nor bad. The question is, who guides the change, and how. For changes in agriculture affect not only farmers but all Europeans, precisely because they are so closely connected with our food, the climate, nature and rural areas. It is therefore important that as a society, we agree on the direction in which agriculture should develop.

We must decide what other services we expect from farmers (apart from growing our food), and how we want to pay for these services. Europe must have a set of common goals to help it mould the future. The European Union’s Common Agricultural Policy, generously furnished with an annual budget of almost 60 billion euros, is the most important means to achieve these goals. Despite this, policies are not geared to what many European citizens regard as important: conserving the environment, keeping animals in appropriate conditions, protecting water, birds and insects, and maintaining life and livelihoods in rural areas.

On the contrary, the EU’s agricultural policy is a bureaucratic monster, scarcely comprehensible for normal mortals. Many people don’t even know that it exists. It is revised every seven years, yet it still promotes an outdated, misguided system – one that is unjust, unecological, and not designed to strengthen society’s goals. Funds are paid out to farmers for each hectare they manage. Big farms rake in a bounteous harvest, while programmes to support smaller farms are utterly underfunded.

Europe’s farm policy has been criticised for years. Many of its problems could be resolved while the coming reform is in full swing. A decision will be made in the next couple of years on what exactly it will look like. But the draft for the coming budget period ignores the criticism and sticks to the same old
erroneous approaches. The proposal that is currently on the table goes in the exact opposite direction of what is needed for a courageous, forward-looking Europe.

That is why we have produced this atlas. It shows how closely Europe’s agriculture is intertwined with our lives and our living space. It also reveals how little of the funding from the Common Agricultural Policy is fit for purpose: how little of the funding actually furthers the goals that Europeans wish for their farming.

But the atlas also illustrates that it is worthwhile pushing for a better, fundamentally different set of agricultural policies. In many countries in the European Union, movements are growing for a sustainable food system that is socially acceptable and globally just. Farmer and consumer associations are forming networks with groups that promote nature, the environment and animal welfare, as well as with international development organizations.

The European edition of this atlas takes up this banner. It combines elements from various already-published national editions, giving both an overview of Europe as a whole as well as insights into the agricultural structures in various EU member states. The product of a Europe-wide network, this atlas aims to strengthen civil society and social movements throughout the continent, thereby advancing the ecological and social transformation in our agricultural and food systems.

For many years, Europe’s governments have ignored the demands of a large part of the population. Not only that, they have pandered to the interests of the industrial agricultural lobby at home and in Brussels. This is outrageous. They are doing a disservice to European farming – and they are jointly responsible for ensuring that the major goals set by the EU are not achieved; they neither protect the climate, soils, water and biodiversity, nor promote global justice through the sustainable use of resources and fair international trade.

There is enough money in EU coffers for a different type of farm policy. But it has to be used in a way that rewards agricultural services that serve the common good. It is high time for a lively social debate about the future shape of agriculture. People in the European Union must have the knowledge and certainty that agricultural policy is being used in a sensible way and for the common good. Only then will they give it their support.

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12 BRIEF LESSONS ON
AGRICULTURAL POLICY IN EUROPE

1 The European Union’s AGRICULTURAL POLICY is important for everyone in Europe. It shapes our farming, which in turn moulds the RURAL environment and its SOCIAL AND ECOLOGICAL conditions.

2 The Common Agricultural Policy takes THE BIGGEST SLICE of the EU’s budget pie. The next seven-year support period begins in 2021. Negotiations on reforms are IN FULL SWING.

3 Structurally weak RURAL AREAS – and the people who live there – should benefit from the funding. But few do so because of MISGUIDED goals and rules. The proposed reforms will do LITTLE to change this.

4 Sustainable farming is key to the protection of INSECTS AND BIRDS, CLEAN WATER AND HEALTHY FOOD. Few EU funds flow into these areas.

5 Farmers who manage a lot of land get LARGE AMOUNTS OF MONEY; small farms get VERY LITTLE. As a result, investments are HARDLY STIMULATED in countries with many small farms.

6 Rural areas also get further support, other than for agriculture. But FAR LESS MONEY is available for these purposes than for the direct payments.
The EU has committed itself to international goals for **Climate Protection and Biodiversity**, as well as for **Global Justice**. Without far-reaching reforms to its farm policies, it will **miss** these targets.

Agricultural production in the EU has **negative** ecological and social effects in many countries **around the world**. Imported commodities produced in many countries overexploit the soil and water there; exports of milk powder and meat outcompete local producers.

**Animal Welfare** is a big concern for many European citizens. But **few** EU agricultural policy funds are allotted to solving welfare problems in animal husbandry.

In the EU, just **3.1 percent** of the farm enterprises manage **more than half** the agricultural land. Between 2003 and 2013, more than one-quarter of all farms **closed down**. Their land is now worked by others.

The EU’s agricultural policy helps **combat the political erosion** of the European Union. It is especially important in rural areas, where dissatisfaction with the EU is high.

For the Common Agricultural Policy to be more widely accepted, it must **protect** the environment and the climate, **improve** animal welfare and **promote** small and medium-sized sustainable farms.
In marked contrast to conventional agriculture, organic farming avoids using synthetic chemical pesticides, easily soluble mineral fertilizers and genetically modified organisms. Livestock raisers must comply with strict rules as to the types of feed they use, and their animals must have access to paddocks and grazing areas. In organic production, the farm is regarded as an integrated ecosystem in which the various elements are maintained in balance with each other. Within the European Union, organic products are produced in accordance with EU legislation. But within each country, organic farming associations may in addition set their own private standards. These are often stricter than the EU rules. Because it uses limited resources judiciously and strives to reduce its impact on the environment, organic farming provides significant benefits for the environment and society.

In Europe as a whole, organic agriculture accounts for 2.7 percent of the farmed area; within the EU, the figure is 6.7 percent. The highest shares within the EU are in Austria (21.9 percent), Estonia (18.9 percent) and Sweden (18.0 percent). The countries with the largest absolute areas of organic production are Spain (2 million hectares), Italy (1.8 million) and France (1.5 million). Italy, France and Germany are the countries where the organic area increased most between 2015 and 2016: in Italy it rose by 300,000 hectares, in France by 215,000 hectares, and in Germany by 160,000 hectares.

The expansion of organic farming in the EU can be attributed to two factors: strong demand from consumers, and government support. Between 2000 to 2016, the per capita consumption of organic food in the EU almost quadrupled, reaching an average of 60.5 euros per person in 2016. During this period, for the EU as a whole, the market for organic food grew by between 5 and 19 percent a year. In Germany, the world’s second largest market for organic groceries, 10 billion euros worth of organic products were sold in 2017: that represented a market share of over 5 percent. At over 10 percent, Denmark had the highest market share for organics in the whole world.

The EU and its member states support organic farming through targeted subsidies drawn from Pillar II of the Common Agricultural Policy, which deals with rural development. Organic farms automatically fulfill the environmental requirements for direct payments. For the EU as a whole, an average of 6.4 percent of the budget for agri-environmental and climate measures goes to organic farming. But this figure masks a wide range, with expenditure varying from...
one country to another: from just 0.2 percent in Malta to as much as 13.2 percent in Denmark. The Netherlands is the only country that does not make any specific area-based allocations for organic farms from the agri-environmental and climate budget; it instead focuses on policies that aim to strengthen the competitiveness of the organic sector.

The support for organic farming distinguishes between premiums for farmers who convert to organic farming, and subsidies to encourage them to maintain organic production. Support also varies according to the land use, stocking density and crop types. The levels also differ from country to country. Denmark promotes lower applications of nitrogen fertilizer (up to a maximum of 60 kg per hectare), while Hungary offers more support for land used for grazing than for meadows that are mowed. In 2015, the subsidy for maintaining organic grassland ranged from 43 euros per hectare (Sweden) to 545 euros (Estonia). For arable land, rates ranged from 90 euros (United Kingdom) to 600 euros (Slovenia). For vegetable production, the range was 184 euros (Denmark) to 900 euros (Belgium and Cyprus).

Although organic farming has increased in importance over the last three decades, it is unable to satisfy consumer demand. The Common Agricultural Policy should be reoriented to promote organic farming through national strategies that cover the entire value chain, and via targeted use of subsidies for agri-environmental and climate measures. In June 2018, the European Commission proposed to continue supporting organic farming in the coming budget period through area-dependent payments to meet the EU’s environmental, climate and other management commitments. It remains up to the member states to decide whether and how they promote organic farming. The level of future support will depend on the extent to which the new-look Common Agricultural Policy will reward the concrete environmental services of agriculture.

Ecological livestock raising and meat production have a smaller market share in the EU than ecologically grown crops.