



INSTITUTO NACIONAL DE ESTATÍSTICA
STATISTICS PORTUGAL



Farm Structure Survey

2016



Edition 2017



INSTITUTO NACIONAL DE ESTATÍSTICA
STATISTICS PORTUGAL

Farm Structure Survey

2016

Edition 2017

[DATASHEET]

Title | Farm Structure Survey 2016

Editor | Statistics Portugal
Av. António José de Almeida
1000-043 Lisboa
Portugal
Telephone: 21 842 61 00 | Fax: 21 845 40 84

Chairman of the Board of Directors | Alda de Caetano Carvalho

Design and Composition | Statistics Portugal

ISSN | 0871-8040

ISBN | 978-989-25-0429-2

Frequency | irregular



Updated in 16-04-2018:
Replaced Table 8 on page 22

[INTRODUCTION]

Statistics Portugal (INE, IP) makes available the publication with the analysis of the results of the Farm Structure Survey 2016 (FSS 2016), comparing, whenever appropriate, with retrospective information from 2013 and 2009.

FSS 2016 completes the life time of structural surveys provided in Regulation (EC) No 1166/2008 and precedes the next agricultural census.

It is expected that this publication could be a reference for a better understanding of the Portuguese agriculture and help to promote discussion and reflection on this sector, particularly convenient as the results are one of the main data sources for the monitoring and evaluation of the measures implemented by the current Common Agricultural Policy (CAP), contributing to the CAP first report, which the Commission is required to submit to the European Parliament and the Council by 31 December 2018.

Users are strongly encouraged to send their comments and suggestions, with a view to continuously improve the quality of agricultural statistics.

To all those who cooperate in the conception, design and conduction of this operation and especially to the willingness of farmers in responding to the survey, we address our thanks.

[TABLE OF CONTENTS]

Page

- 3 > Introduction
- 5 > Executive Summary
- 6 > Conventional Signs
- 9 > Results analysis



[EXECUTIVE SUMMARY]

The farm structure continues to evolve positively: since 2013, the average size of farms has increased by 0.3 hectares of Utilized Agricultural Area (UAA) (14.1 hectares in 2016), the Economic Size per holding increased by 2.8 thousand Euros of Standard Output (SO) (19.9 thousand Euros in 2016), the number of agricultural enterprises increased by 1.4 thousand and the labour force indicators, related labour productivity and efficiency, improved significantly.

The analysis of agricultural holdings according to the farm type points to the specialization of Portuguese agriculture, given that 70.2% of the farms in 2016 were specialized (one activity provides more than 2/3 of the SO), with highlight to grazing livestock specialization (34.3% of the national SO) and permanent crops specialization (21.1% of the national SO).

Large-scale and entrepreneurial agriculture, formed mostly by agricultural enterprises, although it represented only 4.4% of total holdings in 2016, managed almost 1/3 of the UAA and produced 44.6% of the livestock. In this context, it should be stressed that farms which irrigated most of its UAA, despite representing less than ¼ of the total holdings and 10.9% of the UAA in 2016, generated 36.2% of the national SO.

One negative aspect is the aging of agricultural holders, the oldest in the EU28, whose average age has increased from 63 in 2009 to 65 in 2016.

Despite the positive evolution of national agriculture, the comparison of labour force indicators with those of the EU28 is still unfavourable. The average productivity of the agricultural labour force was 16.2 thousand Euros of SO per Annual Work Unit (AWU), less than half of the value in the EU28 in 2013. Similarly, the efficiency of the agricultural labour force, expressed in UAA per AWU, is lower than the European average.

[CONVENTIONAL SIGNS]

CONVENTIONAL SIGNS, ACRONYMS AND INFORMATION TO USERS

Conventional signs:

- // Null or not applicable
- x Not available
- ø Less than half of the unit used

Acronyms:

| | |
|------|---|
| % | Percentage |
| LSU | Livestock unit |
| SO | Standard output |
| ha | Hectares |
| FSS | Farm Structure Survey |
| IFAP | Integrated Administration and Control System (IACS) |

| | |
|----------|--|
| No. | Number |
| NUTS | Nomenclature of Territorial Units for Statistical Purposes, 2013 Version |
| AWU | Annual work unit |
| p.p. | Percentage points |
| CAP | Common Agricultural Policy |
| PDR 2020 | Rural Development Programme 2014-2020 |
| PRODER | Rural Development Programme |
| NUAA | Unutilised agricultural land |
| UAA | Utilised agricultural area |
| EU 28 | European Union |
| INE | Statistics Portugal |
| I. P. | Public Institute |
| EC | European Commission |



[RESULTS ANALYSIS]

>> Agricultural holdings: decrease in farmland abandonment

[UAA without significant changes]

[The 3.6 million hectares of UAA correspond to 39.5% of the national territory]

According to the results of the Farm Structure Survey (2016 FSS), there were 259 thousand farms, i.e. -5.4 thousand farms than in 2013 and -46.3 thousand than in 2009, with a slowdown in farmland abandonment in the last three years. Even though a significant number of holders have ceased their agricultural activity since 2009 (-15.2%), the UAA did not undergo significant changes, remaining at 3.6 million hectares (39.5% of the land area). The land structure of agricultural holdings continued to evolve positively, with an increase in the average size (UAA per holding) from 12.0 hectares in 2009 to 14.1 hectares in 2016.

Table 1 >> Number of holdings, UAA and average size, by NUTS II (change 2009-2016)

| NUTS II | Holdings | | UAA | | Average UAA per holding | Change 2009-2016 | | | Change 2009-2013 | | | Change 2013-2016 | | |
|-------------------|----------|-------|-----------|-------|-------------------------|------------------|---------|--------------|------------------|---------|--------------|------------------|---------|--------------|
| | (No.) | (%) | (ha) | (%) | (ha/hold.) | No. hold. (%) | UAA (%) | ha/hold. (%) | No. hold. (%) | UAA (%) | ha/hold. (%) | No. hold. (%) | UAA (%) | ha/hold. (%) |
| Portugal | 258 983 | 100,0 | 3 641 691 | 100,0 | 14,1 | -15,2 | -0,7 | 17,0 | -13,4 | -0,7 | 14,6 | -2,1 | 0,0 | 2,1 |
| Continente | 235 774 | 91,0 | 3 513 006 | 96,5 | 14,9 | -15,2 | -0,8 | 17,0 | -13,5 | -1 | 14,8 | -2,0 | -0,1 | 1,9 |
| Norte | 95 879 | 37,0 | 653 134 | 17,9 | 6,8 | -13,5 | 1,4 | 17,2 | -10,8 | 0,4 | 12,6 | -3,0 | 1,0 | 4,1 |
| Centro | 87 044 | 33,6 | 585 904 | 16,1 | 6,7 | -17,2 | 2,8 | 24,1 | -17,9 | -2,1 | 19,2 | 0,9 | 5,0 | 4,1 |
| AM Lisboa | 5 458 | 2,1 | 77 636 | 2,1 | 14,2 | -28,2 | -11,4 | 23,5 | -19,4 | -15,1 | 5,3 | -10,9 | 4,4 | 17,2 |
| Alentejo | 35 666 | 13,8 | 2 100 762 | 57,7 | 58,9 | -15,5 | -2,4 | 15,5 | -10,6 | -0,3 | 11,5 | -5,5 | -2,1 | 3,5 |
| Algarve | 11 728 | 4,5 | 95 570 | 2,6 | 8,1 | -5,3 | 8,2 | 14,3 | -6,7 | 4,5 | 11,9 | 1,5 | 3,6 | 2,1 |
| Açores | 11 580 | 4,5 | 123 793 | 3,4 | 10,7 | -14,5 | 2,8 | 20,2 | -12,7 | -1,5 | 12,8 | -2,1 | 4,4 | 6,6 |
| Madeira | 11 628 | 4,5 | 4 893 | 0,1 | 0,4 | -14,6 | -9,9 | 5,5 | -11,3 | -3,1 | 9,3 | -3,7 | -7,0 | -3,5 |



In regional terms, developments in the agricultural area and in the number of holdings were quite different. Área Metropolitana de Lisboa was in relative terms the region with the highest farmland abandonment, its agricultural area declining between 2009 and 2016 by almost 10 thousand hectares and the number of holdings by 28.2%.

The average size of holdings recorded great regional variability, with the average size of holdings in the Alentejo region four times the national average. By contrast, holdings in the Norte and Centro regions were on average smaller than 7 hectares of the UAA, i.e. less than half of the national value (14.1 hectares of the UAA per holding).

[Average size of agricultural holdings exceeds 14 hectares]

[Since 2009, the Área Metropolitana de Lisboa was the region that registered the highest abandonment of agricultural activity, in relative terms]

<< **agricultural holding**: a single unit both technically and economically, which uses its own labour and production factors and which compulsorily complies with the following four conditions:

1. it produces 1 or more agricultural products;
2. it has or exceeds a certain size (area, head of livestock, etc.);
3. it has single management;
4. it is located at a specific and identifiable location.

<< **utilised agricultural area (UAA)**: the area of the holding, which includes: arable land (cleared and under cover of scrub and forests), kitchen garden, land under permanent crops and permanent pasture.

>> Land structure: 2.4% of holdings managed 58% of the UAA

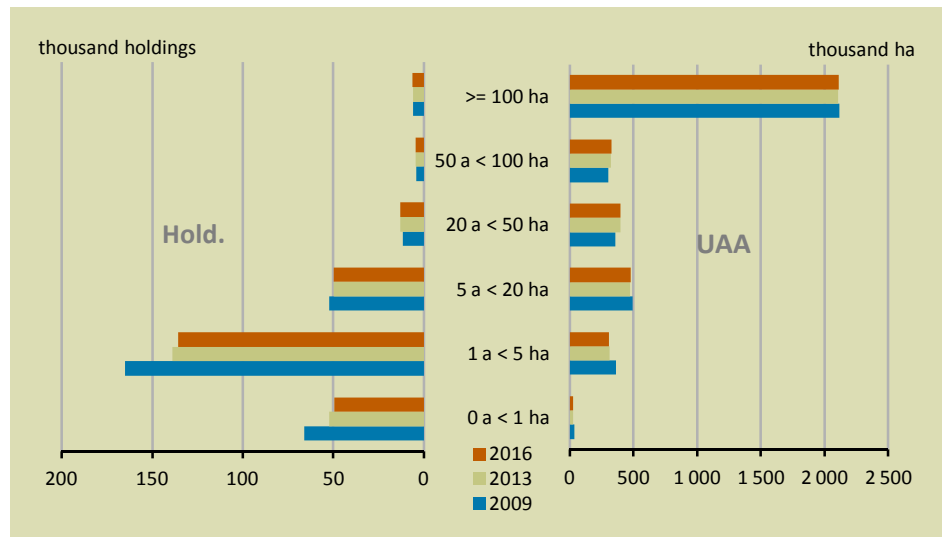
[High concentration of UAA, with the 1,000 largest farms managing almost 1 million hectares of UAA]

In 2016 holdings with 100 or more hectares managed more than half of the UAA (58.0%), accounting for only 2.4% of agricultural holdings. A reduced number of large-sized holdings (261 farms with 1,000 or more hectares of the UAA) managed 12.3% of the national UAA. By contrast, small-sized holdings (less than 1 hectare), although corresponding to 19.0% of the total, only farmed 0.7% of the UAA.

Table 2 >> Number of holdings and UAA, by UAA classes
(Change 2009-2016)

| UAA classes | Holdings | | UAA | | Change 2009-2016 | | Change 2009-2013 | | Change 2013-2016 | |
|------------------|----------|-------|-----------|-------|------------------|------------|------------------|------------|------------------|------------|
| | (No.) | (%) | (ha) | (%) | No. hold. (%) | UAA (%) | No. hold. (%) | UAA (%) | No. hold. (%) | UAA (%) |
| Total | 258 983 | 100,0 | 3 641 691 | 100,0 | -15,2 | -0,7 | -13,4 | -0,7 | -2,1 | 0,0 |
| < 1 ha | 49 301 | 19,0 | 26 528 | 0,7 | -25,3 | -24,3 | -20,7 | -21,4 | -5,8 | -3,7 |
| 1 a < 5 ha | 135 827 | 52,4 | 304 459 | 8,4 | -17,6 | -15,9 | -15,8 | -13,9 | -2,1 | -2,3 |
| 5 a < 20 ha | 49 942 | 19,3 | 478 763 | 13,1 | -4,2 | -2,8 | -4,8 | -3,6 | 0,6 | 0,9 |
| 20 a < 50 ha | 12 999 | 5,0 | 395 056 | 10,8 | 10,8 | 10,4 | 9,9 | 11,1 | 0,7 | -0,7 |
| 50 a < 100 ha | 4 697 | 1,8 | 326 304 | 9,0 | 7,9 | 7,7 | 6,9 | 6,5 | 0,8 | 1,1 |
| 100 a < 500 ha | 5 159 | 2,0 | 1 121 887 | 30,8 | 3,6 | 2,2 | -1,2 | -3,9 | 4,8 | 6,3 |
| 500 a < 1 000 ha | 798 | 0,3 | 538 972 | 14,8 | -6,9 | -7,1 | -1,4 | -0,8 | -5,6 | -6,3 |
| ≥ 1 000 ha | 261 | 0,1 | 449 723 | 12,3 | -1,8 | 2,1 | 3,4 | 8,4 | -5,1 | -5,8 |

Figure 1 >> Holdings, by UAA classes
(2009-2016)



Farmland abandonment occurred mainly in small holdings. The decline in the number of large-sized holdings was limited to less than 100 holdings, probably related to land and business fragmentation.

[Once again, the abandonment of agricultural activity focused on small-scale agriculture]



>> Legal nature: number of agricultural enterprises continued to rise

Agricultural enterprises managed 1/3 of UAA and 44.6% of livestock

Those with legal and economic responsibility in agricultural holdings were mostly individual holders (95.0%), the 11.4 thousand enterprises accounting for only 4.4% of the total. However, in large-sized holdings (100 or more hectares of UAA) enterprises played a more important role (39.9%). Since 2009 the number of enterprises rose by 68.2%.

Table 3 >> Legal personality of the holding, by UAA classes
(Change 2009-2016)

| UAA classes | 2016 | | | | | | Change 2009-2016 | | | Change 2009-2013 | | | Change 2013-2016 | | |
|---------------|-------------|------|--------------|------|-------|-----|------------------|--------------|--------|------------------|--------------|--------|------------------|--------------|-------|
| | Sole holder | | Legal person | | Other | | Sole holder | Legal person | Other | Sole holder | Legal person | Other | Sole holder | Legal person | Other |
| | (No.) | (%) | (No.) | (%) | (No.) | (%) | | | | | | | | | |
| Total | 246 149 | 95,0 | 11 397 | 4,4 | 1 437 | 0,6 | -17,2 | 68,2 | 29,6 | -14,8 | 47,1 | -13,6 | -2,9 | 14,3 | 49,9 |
| Without UAA | 693 | 55,6 | 553 | 44,4 | 0 | 0,0 | -34,3 | 65,1 | -100,0 | -50,2 | -5,0 | -100,0 | 32,0 | 73,7 | - |
| 0 < 1 ha | 47 250 | 98,3 | 577 | 1,2 | 226 | 0,5 | -26,5 | 126,5 | 128,6 | -21,0 | 155,5 | -21,0 | -6,9 | -11,3 | 189,3 |
| 1 a < 5 ha | 133 122 | 98,0 | 2 253 | 1,7 | 452 | 0,3 | -18,7 | 191,1 | 56,3 | -16,6 | 131,6 | 24,7 | -2,6 | 25,7 | 25,4 |
| 5 a < 20 ha | 46 956 | 94,0 | 2 711 | 5,4 | 274 | 0,5 | -7,1 | 89,1 | 43,7 | -6,6 | 60,5 | -16,1 | -0,5 | 17,8 | 71,3 |
| 20 a < 50 ha | 11 086 | 85,3 | 1 757 | 13,5 | 156 | 1,2 | 5,8 | 55,3 | 23,5 | 5,6 | 52,1 | -10,3 | 0,2 | 2,1 | 37,7 |
| 50 a < 100 ha | 3 541 | 75,4 | 1 067 | 22,7 | 90 | 1,9 | 3,4 | 27,6 | -5,5 | 6,3 | 16,1 | -51,5 | -2,7 | 9,9 | 94,7 |
| ≥ 100 ha | 3 501 | 56,3 | 2 479 | 39,9 | 239 | 3,8 | -7,7 | 23,3 | -20,6 | -4,3 | 10,0 | -33,3 | -3,6 | 12,0 | 19,1 |

The size of farms managed by enterprises is much higher than those managed by sole holders

The high representativeness of family farming, formed by small holdings, thus co-existed with large-scale and entrepreneurial agriculture, mostly composed of agricultural enterprises that, although accounting for only 4.4% of holdings in 2016, managed almost one-third of the UAA and produced 44.6% of livestock. In fact, on average, each agricultural enterprise managed 105 hectares of UAA (11 times that of individual holders) and produced 87 livestock units (18 times that of individual holdings).

Table 4 >> UAA and livestock units (LSU), by legal personality and UAA classes (2016)

| UAA classes | Sole holder | | | | Legal person | | | | Other | | | |
|---------------|-------------|------|-----------|------|--------------|------|---------|------|---------|-----|--------|-----|
| | UAA | | LSU | | UAA | | LSU | | UAA | | LSU | |
| | (ha) | (%) | (No.) | (%) | (ha) | (%) | (No.) | (%) | (ha) | (%) | (No.) | (%) |
| Total | 2 273 881 | 62,4 | 1 214 573 | 54,6 | 1 195 004 | 32,8 | 992 368 | 44,6 | 172 807 | 4,7 | 16 775 | 0,8 |
| Without UAA | 0 | 0 | 72 772 | 3,3 | 0 | 0 | 259 089 | 11,7 | 0 | 0 | 0 | 0,0 |
| < 1 ha | 26 116 | 0,7 | 61 114 | 2,7 | 294 | 0,0 | 7 934 | 0,4 | 119 | 0,0 | 199 | 0,0 |
| 1 a < 5 ha | 298 066 | 8,2 | 217 695 | 9,8 | 5 465 | 0,2 | 36 836 | 1,7 | 928 | 0,0 | 293 | 0,0 |
| 5 a < 20 ha | 445 817 | 12,2 | 275 902 | 12,4 | 30 446 | 0,8 | 78 113 | 3,5 | 2 499 | 0,1 | 1 009 | 0,0 |
| 20 a < 50 ha | 334 803 | 9,2 | 201 647 | 9,1 | 55 222 | 1,5 | 70 368 | 3,2 | 5 031 | 0,1 | 2 660 | 0,1 |
| 50 a < 100 ha | 243 172 | 6,7 | 108 501 | 4,9 | 76 748 | 2,1 | 50 349 | 2,3 | 6 384 | 0,2 | 1 889 | 0,1 |
| ≥ 100 ha | 925 907 | 25,4 | 276 943 | 12,5 | 1 026 829 | 28,2 | 489 679 | 22,0 | 157 846 | 4,3 | 10 726 | 0,5 |

<< **holder:** the holder of the holding is that natural person or the legal person on whose account and in whose name the holding is operated and who is legally and economically responsible for the holding. The holder reaps the benefits and bears any losses, takes the strategic decisions regarding the production system, investment loans, etc.

<< **legal personality of the holding:** the legal personality of the holding depends on the status of the holder.

The question whether a holder is a “natural” or a “legal” person is important for the classification of holdings into the following groups:

Holdings where the holder is:

(a) a natural person and the sole holder of an independent holding.

A single individual and natural person who is the holder of a holding which is not linked to any holdings of other holders, either by common management or similar arrangements.

(a) with major use of family members on farm work;

(b) with major use of non-family labour;

(c) a legal person.

A legal entity other than a natural person but having the normal rights and duties of an individual, such as the ability to sue or to be sued (a general legal capacity of its own).

(a) companies, constituted according to commercial and civil codes.

Other legal natures:

(a) common land managing party;

(b) others (State and legal persons, whether the holding is subordinated to the central or local administration, directly or through a body (eg agrarian stations, agricultural schools, public institutes, public enterprises, forest administrations, barracks, prisons, etc.).

<< **livestock unit, (LSU or sometimes LU):** is a reference unit which facilitates the aggregation of livestock from various species and age, via the use of specific coefficients established initially on the basis of the nutritional or feed requirement of each type of animal. The reference unit used for the calculation of livestock units (=1 LSU) is the grazing equivalent of one adult dairy cow.

>> Economic size of holdings: positive developments vis-à-vis 2013

Table 5 >> Number of holdings, by economic size classes and NUTS II
(2016)

| NUTS II | Total | | | | Very small holdings (SO < 8 000 Euros) | | | |
|-----------------|----------|---------------|-------|---------------------|---|------|--------------|------|
| | Holdings | SO | | Economic size | Holdings | | SO | |
| | (No.) | (1 000 Euros) | (%) | (1000 Euros/ hold.) | (No.) | (%) | (1000 Euros) | (%) |
| Portugal | 258 983 | 5 144 213 | 100,0 | 19,9 | 188 652 | 72,8 | 488 733 | 9,5 |
| Mainland | 235 774 | 4 584 374 | 89,1 | 19,4 | 174 306 | 73,9 | 445 257 | 9,7 |
| Norte | 95 879 | 1 122 815 | 21,8 | 11,7 | 71 846 | 74,9 | 204 236 | 18,2 |
| Centro | 87 044 | 1 217 146 | 23,7 | 14,0 | 69 477 | 79,8 | 156 857 | 12,9 |
| AM Lisboa | 5 458 | 288 640 | 5,6 | 52,9 | 3 420 | 62,7 | 10 602 | 3,7 |
| Alentejo | 35 666 | 1 719 736 | 33,4 | 48,2 | 22 467 | 63,0 | 51 362 | 3,0 |
| Algarve | 11 728 | 236 037 | 4,6 | 20,1 | 7 098 | 60,5 | 22 200 | 9,4 |
| Açores | 11 580 | 474 606 | 9,2 | 41,0 | 5 590 | 48,3 | 13 964 | 2,9 |
| Madeira | 11 628 | 85 233 | 1,7 | 7,3 | 8 755 | 75,3 | 29 513 | 34,6 |

| NUTS II | Small holdings (SO from 8 000 to < 25 000 Euros) | | | | Medium-sized holdings (SO from 25 000 to < 100 000) | | | | Large holdings (SO ≥ 100 000 Euros) | | | |
|-----------------|---|------|--------------|------|--|------|--------------|------|--|------|--------------|------|
| | Holdings | | SO | | Holdings | | SO | | Holdings | | SO | |
| | (No.) | (%) | (1000 Euros) | (%) | (No.) | (%) | (1000 Euros) | (%) | (No.) | (%) | (1000 Euros) | (%) |
| Portugal | 40 291 | 15,6 | 560 489 | 10,9 | 20 598 | 8,0 | 1 011 332 | 19,7 | 9 441 | 3,6 | 3 083 659 | 59,9 |
| Mainland | 35 577 | 15,1 | 496 952 | 10,8 | 17 894 | 7,6 | 865 874 | 18,9 | 7 997 | 3,4 | 2 776 291 | 60,6 |
| Norte | 16 267 | 17,0 | 222 072 | 19,8 | 5 972 | 6,2 | 271 075 | 24,1 | 1 795 | 1,9 | 425 433 | 37,9 |
| Centro | 9 846 | 11,3 | 138 457 | 11,4 | 5 557 | 6,4 | 271 891 | 22,3 | 2 165 | 2,5 | 649 941 | 53,4 |
| AM Lisboa | 960 | 17,6 | 14 374 | 5,0 | 610 | 11,2 | 30 275 | 10,5 | 468 | 8,6 | 233 389 | 80,9 |
| Alentejo | 5 431 | 15,2 | 78 852 | 4,6 | 4 549 | 12,8 | 236 682 | 13,8 | 3 219 | 9,0 | 1 352 840 | 78,7 |
| Algarve | 3 074 | 26,2 | 43 198 | 18,3 | 1 205 | 10,3 | 55 951 | 23,7 | 351 | 3,0 | 114 688 | 48,6 |
| Açores | 2 160 | 18,7 | 31 685 | 6,7 | 2 432 | 21,0 | 134 224 | 28,3 | 1 398 | 12,1 | 294 733 | 62,1 |
| Madeira | 2 554 | 22,0 | 31 852 | 37,4 | 273 | 2,3 | 11 235 | 13,2 | 46 | 0,4 | 12 634 | 14,8 |

The national total SO for 2016 exceeded €5.1 billion (+14.1% than in 2013), with the Alentejo region contributing over one-third of this value. On average, each agricultural holding generated €19.9 thousand of total SO, i.e. more than €2.8 thousand compared to 2013, corresponding to a 16.5% increase in the average economic size of holdings.

[On average, each farm generated 19.9 thousand Euros of SO]

An analysis of holdings by economic size class shows that large holdings (over €100 thousand of total SO), although accounting for only 3.6% of agricultural holdings, originated 59.9% of the national total SO in 2016. By contrast, almost three-quarters of holdings were quite small, generating less than €8 thousand a year and contributing 9.5% to the national total SO.

[Large agricultural holdings contributed with almost 60% of the SO]

In regional terms, there was a great asymmetry in the economic size per holding, with holdings in Área Metropolitana de Lisboa generating on average €52.9 thousand of total SO, i.e. almost five times the value achieved by holdings in the Norte region.



[Almost 3/4 of the holdings are very small, generating less than 8 thousand Euros per year]



<< **standard output of an agricultural product (crop or livestock), (SO):** is the average monetary value of the agricultural output at farm-gate price, in euro per hectare or per head of livestock. There is a regional SO coefficient for each product, as an average value over a reference period. The reference period for FSS 2016 covered a five years period from 2011 to 2015.

<< **total SO:** the sum of all SO per hectare of crop and per head of livestock in a farm is a measure of its overall economic size, expressed in euro.

<< **economic size:** of the holdings is measured using Standard Output and it's expressed in Euros.

>> Farm Type: most agricultural holdings were specialised (70.2%)

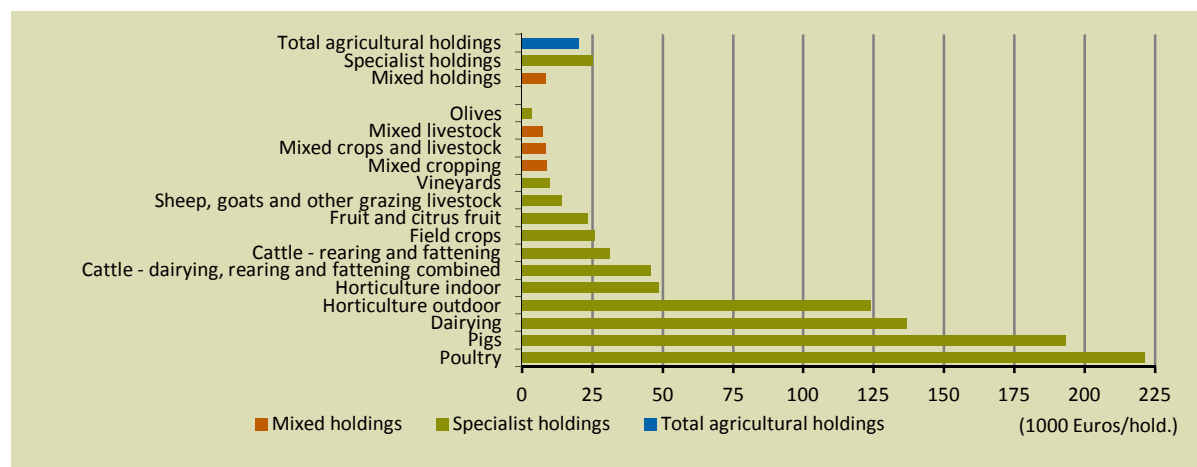
Table 6 >> Number of holdings, SO and UAA, by farm type (2016)

| Farm type | Holdings | | SO | | | UAA | |
|---|----------|-------|--------------|-------|---------------------|-----------|-------|
| | (No.) | (%) | (1000 euros) | (%) | (1000 Euros /hold.) | (ha) | (%) |
| Total | 258 983 | 100,0 | 5 144 213 | 100,0 | 19,9 | 3 641 691 | 100,0 |
| Specialist holdings | 181 901 | 70,2 | 4 531 055 | 88,1 | 24,9 | 2 897 497 | 79,6 |
| Field crops | 25 019 | 9,7 | 643 761 | 12,5 | 25,7 | 513 902 | 14,1 |
| Of which: Outdoor horticulture | 1 620 | 0,6 | 200 122 | 3,9 | 123,5 | 42 335 | 1,2 |
| Indoor horticulture | 8 467 | 3,3 | 408 355 | 7,9 | 48,2 | 23 626 | 0,6 |
| Of which: Under glass | 1 695 | 0,7 | 173 473 | 3,4 | 102,4 | 4 301 | 0,1 |
| Permanent crops | 97 935 | 37,8 | 1 085 442 | 21,1 | 11,1 | 681 874 | 18,7 |
| Of which: Vineyard | 28 826 | 11,1 | 275 095 | 5,3 | 9,5 | 153 674 | 4,2 |
| Fruit and citrus fruits | 27 382 | 10,6 | 638 548 | 12,4 | 23,3 | 240 168 | 6,6 |
| Olives | 22 131 | 8,5 | 70 062 | 1,4 | 3,2 | 155 631 | 4,3 |
| Grazing livestock | 45 588 | 17,6 | 1 766 853 | 34,3 | 38,8 | 1 654 255 | 45,4 |
| Of which: Dairying | 6 594 | 2,5 | 899 466 | 17,5 | 136,4 | 164 086 | 4,5 |
| Cattle - rearing and fattening | 17 661 | 6,8 | 547 871 | 10,7 | 31,0 | 918 732 | 25,2 |
| Cattle - dairying, rearing, fattening combine | 738 | 0,3 | 33 613 | 0,7 | 45,5 | 19 497 | 0,5 |
| Sheep, goats and other grazing livestock | 20 596 | 8,0 | 285 902 | 5,6 | 13,9 | 551 941 | 15,2 |
| Granivores | 4 892 | 1,9 | 626 643 | 12,2 | 128,1 | 23 840 | 0,7 |
| Of which: Pigs | 1 507 | 0,6 | 290 667 | 5,7 | 192,9 | 17 598 | 0,5 |
| Poultry | 1 492 | 0,6 | 330 220 | 6,4 | 221,3 | 4 048 | 0,1 |
| Mixed holdings: | 75 854 | 29,3 | 613 158 | 11,9 | 8,1 | 719 420 | 19,8 |
| Mixed cropping | 27 100 | 10,5 | 230 083 | 4,5 | 8,5 | 194 100 | 5,3 |
| Mixed livestock | 10 974 | 4,2 | 78 285 | 1,5 | 7,1 | 77 992 | 2,1 |
| Mixed crops and livestock | 37 780 | 14,6 | 304 790 | 5,9 | 8,1 | 447 329 | 12,3 |
| Non-classified holdings | 1 228 | 0,5 | 0 | 0,0 | 0,0 | 24 774 | 0,7 |

An analysis of holdings according to Farm Type points to the Portuguese agriculture's specialisation, given that 70.2% of holdings were specialised (more than two-thirds of the total SO originated in a single activity), with mixed holdings contributing only 11.9% of the national total SO.

[Agricultural holdings specialised in animal production generate higher SO]

Figure 2 >> Average economic size of agricultural holdings, by farm type (2013)



Holdings specialised in livestock showed the highest economic sizes, with poultry farms generating on average €221.3 thousand, industrial pig farms €192.9 thousand, and dairy farms €136.4 thousand. The horticulture sector was also formed by holdings of large economic size. Conversely, and although large-sized holdings were included, olive-growing and viticulture specialised farms recorded low economic sizes per holding.

[Despite the dynamics of the olive sector, small holdings still prevail]

<< **farm type of a holding:** is determined by the relative contribution of the standard output of the different characteristics of this holding to the total standard output of this one:

Stage 1: The total SO is calculated by valuing the areas of agricultural crops and farm animals, based on the SO established regionally for the different crops and animals.

Stage 2: A holding is allocated to a type of farming class, depending on the relative contribution weighted in value of each plant and animal production to total SO.



>> Area of holdings: agricultural holdings managed half of the national territory

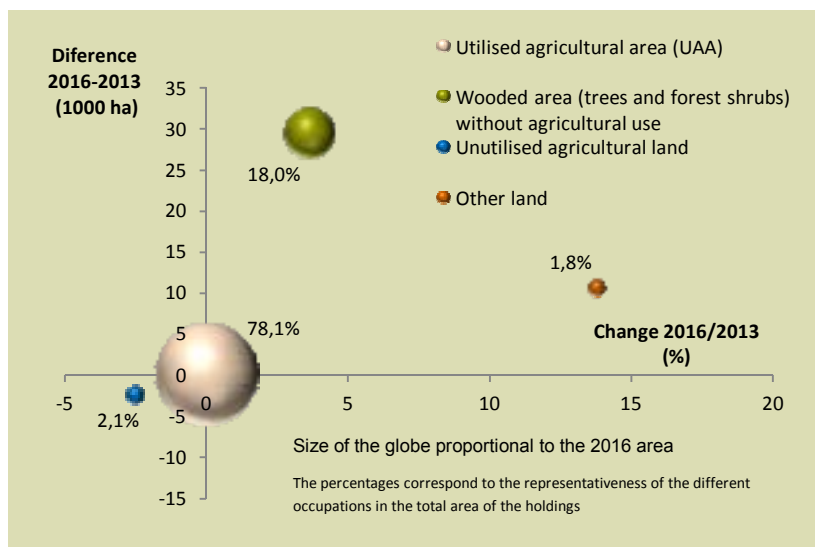
[Wooded area (trees and forest shrubs) without agricultural use represent 18% of the total area of agricultural holdings]

Agricultural holdings took up an area of 4.6 million hectares, corresponding to approximately half of the national territory. The UAA accounted for 78.1% of the total area of agricultural holdings, followed by wooded area (trees and forest shrubs) without agricultural use (18.0%). The Unutilised Agricultural Area (NUAA) of holdings (area with agricultural potential, but not utilised) took up 2.1% of the area of holdings.

Table 7 >> Composition of the total area of the agricultural holdings, by NUTS II (2016)

| Unit: (ha) | | | | | |
|-----------------|----------------------------------|--|-------------------------------------|------------|------------|
| NUTS II | Utilised agricultural area (UAA) | Wooded area (trees and forest shrubs) without agricultural use | Unutilised agricultural area (NUAA) | Other land | Total area |
| Portugal | 3 641 691 | 837 067 | 98 452 | 85 962 | 4 663 173 |
| Mainland | 3 513 006 | 822 722 | 96 491 | 83 671 | 4 515 890 |
| Norte | 653 134 | 281 922 | 18 219 | 17 092 | 970 367 |
| Centro | 585 904 | 247 608 | 35 334 | 14 813 | 883 659 |
| AM Lisboa | 77 636 | 15 094 | 1 550 | 2 706 | 96 985 |
| Alentejo | 2 100 762 | 229 734 | 16 826 | 46 902 | 2 394 224 |
| Algarve | 95 570 | 48 364 | 24 563 | 2 158 | 170 655 |
| Açores | 123 793 | 12 870 | 1 213 | 1 924 | 139 799 |
| Madeira | 4 893 | 1 476 | 748 | 367 | 7 484 |

Figure 3 >> Composition of the total area of the agricultural holdings (evolution 2013-2016)



Agricultural holdings took up approximately the same area as in 2013 (+0.8%), and there was an increase in wooded area (trees and forest shrubs) without agricultural use and a slight decline in areas with potential that were not utilised for agricultural purposes.

- << **total area:** the total used agricultural area, woods and forests without under-planting, unused agricultural area and other areas of the holding.
- << **utilised agricultural area (UAA):** the area of the holding, which includes: arable land (cleared and under cover of scrub and forests), kitchen garden, land under permanent crops and permanent pasture.
- << **unutilised agricultural land:** an area of a holding previously used as an agricultural area but which is no longer used for economic, social or other reasons. It is not used in crop rotation. It may be used again with the help of the resources generally available at the holding.
- << **other land:** areas occupied by buildings, threshing floors, yards, paths, dams, reservoirs, gardens, woodland and forests laid out exclusively to protect the environment or for recreation.

Of the 3.6 million hectares of UAA, more than half were permanent grassland (51.5%), followed by arable land (28.6%) and permanent crops (19.4%).

Table 8 >> Composition of UAA, by NUTSII (2016)

| NUTS II | Arable land | | | Kitchen gardens | Permanent crops | | Permanent grassland ¹ | UAA |
|-------------------|-----------------|-------------|-----------|-----------------|----------------------------|---------|----------------------------------|-----------|
| | Temporary crops | Fallow land | Total | | Total excluding stone pine | Total | | |
| Portugal | 791 538 | 251 759 | 1 043 298 | 16 331 | 639 952 | 705 120 | 1 876 943 | 3 641 691 |
| Continente | 767 442 | 251 744 | 1 019 186 | 15 690 | 635 186 | 700 353 | 1 777 776 | 3 513 006 |
| Norte | 133 624 | 38 680 | 172 305 | 7 025 | 218 719 Rc | 218 773 | 255 032 | 653 134 |
| Centro | 154 324 | 34 126 | 188 450 | 6 387 | 146 045 Rc | 148 470 | 242 597 | 585 904 |
| Lisboa | 29 477 | 4 054 | 33 532 | 137 | 10 335 Rc | 14 715 | 29 252 | 77 636 |
| Alentejo | 438 691 | 159 860 | 598 551 | 1 561 | 220 096 Rc | 270 548 | 1 230 103 | 2 100 762 |
| Algarve | 11 326 | 15 023 | 26 349 | 581 | 39 991 Rc | 47 847 | 20 792 | 95 570 |
| Açores | 22 223 | 0 | 22 223 | 526 | 2 400 | 2 400 | 98 643 | 123 793 |
| Madeira | 1 873 | 15 | 1 888 | 114 | 2 367 | 2 367 | 524 | 4 893 |

¹ Excluding permanent grassland associated with permanent crops

* Table updated in April 2018

<< **arable land**: land often ploughed for annual or multi-annual (less than 5 years) plant production. It also includes fallow land, land kept in good agricultural and environmental condition and land occupied by greenhouses or covered by fixed or mobile structures.

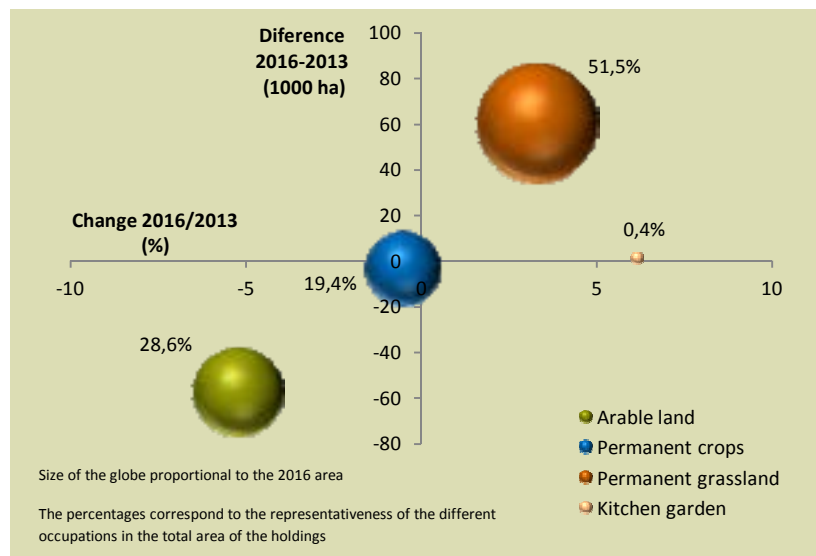
<< **fallow land**: land included in crop rotation, which may be worked, not providing crops at any time in the season in order to improve it. It may take the form of a) land with no crops, b) land with spontaneous vegetation sometimes used by animals or buried or c) land sowed for the exclusive production of green matter for burying to increase soil's fertility.

<< **permanent crops**: crops which occupy the soil for a long period and provide repeated yields of crops over several years and do not rotate with other crops. They do not include permanent grasslands and pastures. In relation to fruit trees, only regular plantations with a minimum density of 100 trees, or 45 trees in regard to olive, fig and nut trees, are considered.

<< **permanent grassland and meadow total**: sowed or spontaneous, usually herbaceous plants for livestock to eat at the site where they grow but that can also be cut at certain times of the year. They are not included in rotation and occupy the land for more than five years.

<< **kitchen garden**: a cultivated area less than 20 ares, devoted solely to growing products such as vegetables, fruits and flowers, primarily for use by the cultivator and not for sale.

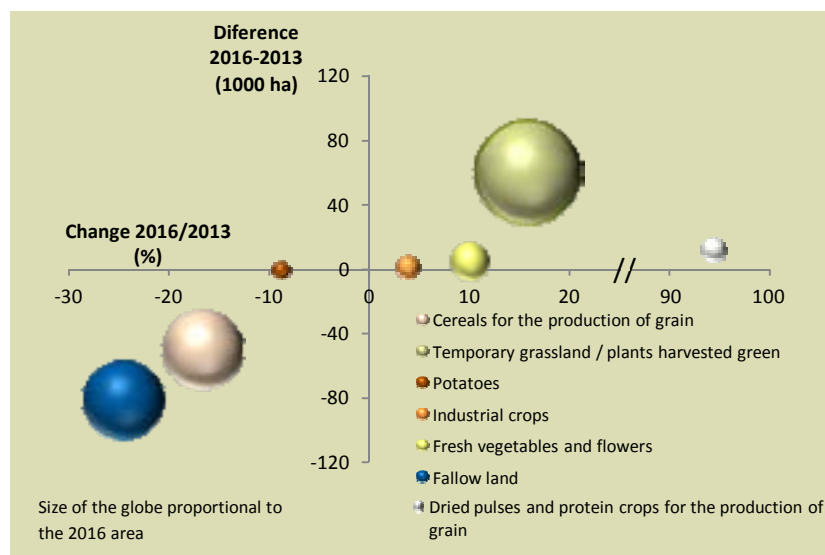
Figure 4 >> Composition of UAA
(evolution 2013-2016)



The cultivation area has not changed significantly since 2013, with arable land declining (-5.2%, due to a decrease in fallow land) and permanent crops undergoing almost no change (-0.5%). By contrast, permanent grassland with or without forest cover increased by 3.3%. This reinforced the downward trend of arable land (-130 thousand hectares than in 2009) and the upward trend of permanent grassland (+92 thousand hectares than in 2009).

The decline in arable land was due to a decrease in fallow land (-24.4%), since the area of temporary crops increased (+3.1%), especially as a consequence of an upsurge in the area of temporary grassland and forage crops.

Figure 5 >> Composition of arable land
(evolution 2013-2016)

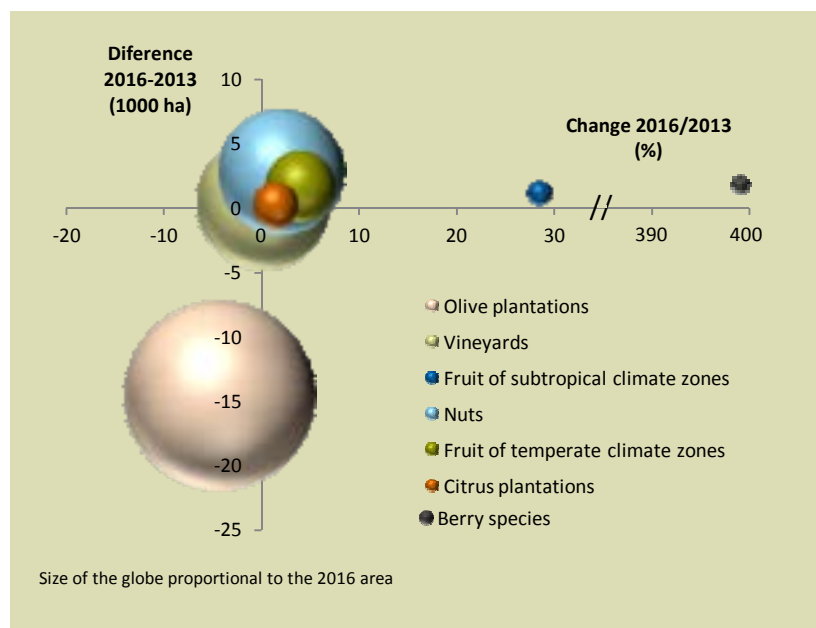


[The decrease in arable land was mainly due to the decrease in fallow land]

The considerable increase in the area of pulses for grain (+94.3%) was due to crop diversification, an eligible crop practice within the scope of the greening component, complementary to the basic payment.

The increase in the vegetable area resulted from the sector's buoyancy in the past few years. By contrast, due to market volatility and low competitiveness, the area of cereals for the production of grain continued to follow the downward trend observed in the past few decades.

Figure 6 >> Composition of permanent crops
(evolution 2013-2016)



In spite of investments in the olive-growing sector (8.7 thousand hectares of intensive oil groves planted since 2013), the area of oil groves decreased (-4.3%) as a result of the abandonment of around 15 thousand hectares of traditional oil groves (less than 100 trees per hectare).

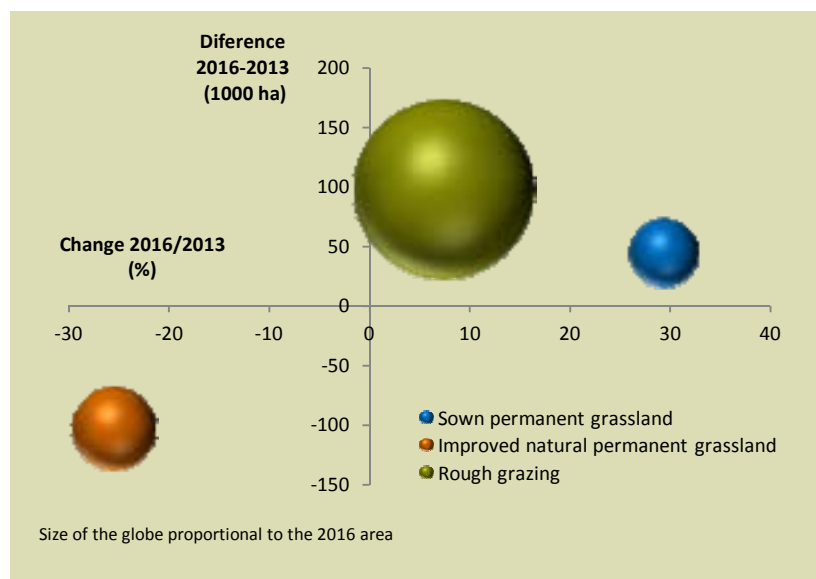
In vineyards, probably due to the new authorisation scheme for planting vineyards in force since 1 January 2016, there was a slight increase of 0.5 thousand hectares, i.e. a 0.3% rise in the wine-growing area.

There was a broadly based increase in the fruit area, in particular remarkable growth in the production of berries, whose area rose almost fivefold in three years (+392.3%). The subtropical fruit area also grew considerably (+28.5%), particularly kiwi crops. This seems to have been due to the incentive from ProDeR and PDR 2020 to fruit growing, which was one of the most relevant sectors as regards measures to support investment.



[Significant increase of the area
of berry species and also of kiwi]

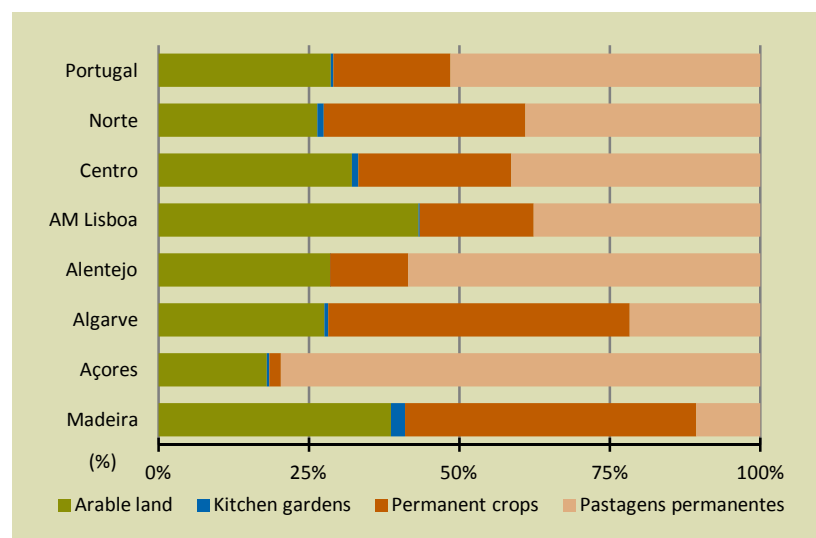
Figure 7 >> Composition of permanent grassland (evolution 2013-2016)



The permanent grassland area increased due to growth in rough grazings (+7.5%) and sowed pastures (+29.4%), and there was a decline in technical interventions to improve grassland (fertilisation, irrigation, sewerage, reseeding).

The regional composition of the UAA reflected the specificities of national agriculture in a rather synthetic manner, with arable land, permanent crops and permanent grassland showing an equitable distribution in the Norte but also in the Centro regions, while in the Algarve and Região Autónoma da Madeira permanent grassland predominated. In Região Autónoma dos Açores permanent grassland was virtually always monoculture, also taking up most of the UAA in the Alentejo region.

Figure 8 >> Composition of UAA, by NUTS II (2016)



>> **Irrigated land: standard output per hectare of irrigated land exceeded €5 thousand, i.e. six times the value reached for rainfed land**

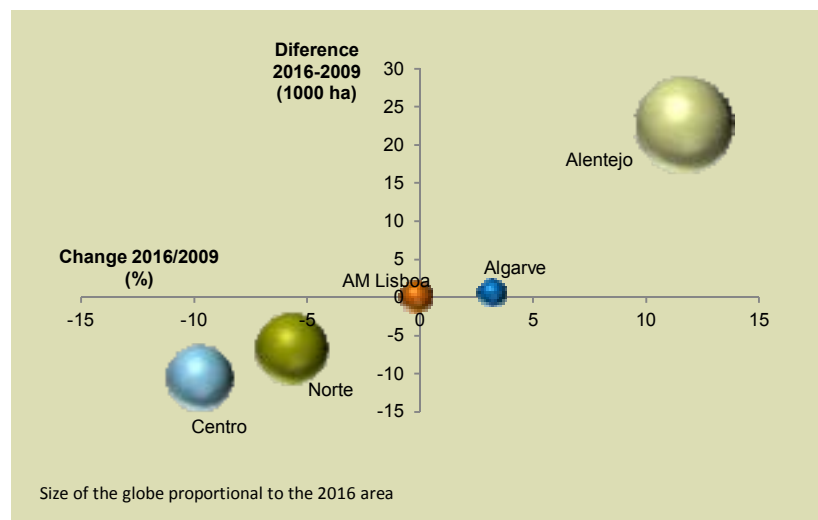
In 2016, 126.5 thousand holdings with irrigation accounted for 48.9% of the total, with 474 thousand irrigated hectares corresponding to 13.0% of the UAA and 86.5% of the irrigable area.

Table 9 >> Irrigable area, irrigated area and SO, by type of holding (irrigation) and NUTSII (2016)

| Classification of holdings by irrigated area in the crop year 2015/2016 | Irrigation in the crop year 2015/2016 | | | | | | Irrigable area | | SO | |
|---|---------------------------------------|------|----------------|-----------------------|-----------|------|----------------|------------|--------------|------|
| | Holdings | | Irrigated area | | UAA | | | | | |
| | (No.) | (%) | (ha) | (% on irrigable area) | (ha) | (%) | (ha) | (% na UAA) | (1000 euros) | (%) |
| Total | 258 983 | 100 | 474 061 | 86,5 | 3 641 691 | 100 | 547 838 | 15,0 | 5 144 213 | 100 |
| Exclusively rainfed | 131 220 | 50,7 | 0 | 0 | 2 162 973 | 59,4 | 26 164 | 1,2 | 1 793 304 | 34,9 |
| Predominantly rainfed | 42 481 | 16,4 | 66 365 | 72,8 | 871 288 | 23,9 | 91 165 | 10,5 | 740 825 | 14,4 |
| Mainly rainfed | 24 882 | 9,6 | 75 736 | 85,4 | 210 388 | 5,8 | 88 639 | 42,1 | 456 575 | 8,9 |
| Mainly irrigated | 18 912 | 7,3 | 78 302 | 91,9 | 126 317 | 3,5 | 85 243 | 67,5 | 455 716 | 8,9 |
| Predominantly irrigated | 40 241 | 15,5 | 253 657 | 98,8 | 270 725 | 7,4 | 256 628 | 94,8 | 1 404 390 | 27,3 |
| Without UAA | 1 247 | 0,5 | - | - | - | - | - | - | 293 404 | 5,7 |
| NUTS II | | | | | | | | | | |
| Norte | 95 879 | 37,0 | 115 078 | 85,3 | 653 134 | 17,9 | 134 891 | 20,7 | 1 122 815 | 21,8 |
| Centro | 87 044 | 33,6 | 98 743 | 77,8 | 585 904 | 16,1 | 126 979 | 21,7 | 1 217 146 | 23,7 |
| AM Lisboa | 5 458 | 2,1 | 23 016 | 89,3 | 77 636 | 2,1 | 25 778 | 33,2 | 288 640 | 5,6 |
| Alentejo | 35 666 | 13,8 | 216 781 | 90,7 | 2 100 762 | 57,7 | 238 941 | 11,4 | 1 719 736 | 33,4 |
| Algarve | 11 728 | 4,5 | 16 690 | 97,3 | 95 570 | 2,6 | 17 158 | 18,0 | 236 037 | 4,6 |
| Açores | 11 580 | 4,5 | 334 | - | 123 793 | 3,4 | - | - | 474 606 | 9,2 |
| Madeira | 11 628 | 4,5 | 3 418 | 83,5 | 4 893 | 0,1 | 4 092 | 83,6 | 85 233 | 1,7 |

The classification of holdings according to the proportion of irrigated UAA points to a predominance of rainfed land, since in 2016 holdings of exclusively rainfed land accounted for 50.7%, managed 59.4% of the UAA and generated 34.9% of total SO, with the majority of earnings originating in livestock production. However, holdings that irrigated most of their UAA, although accounting for less than one-fourth of total holdings and 10.9% of the UAA, generated 36.2% of the national total SO.

Figure 9 >> Irrigated area, by NUTS II
(evolution 2009-2016)



[In the last 7 years, Alqueva irrigation system has promoted an increase of 22.7 thousand hectares of irrigated land in Alentejo region]

The total SO per hectare of UAA in holdings of predominantly irrigated land reached €5.2 thousand in 2016, i.e. four times the national average and six times the value reached by holdings of exclusively rainfed land.

Since 2009 and especially due to the Alqueva infrastructure, irrigated land in the Alentejo region increased by 22.7 thousand hectares.

- << **irrigable area**: the maximum area in a holding that could be irrigated if necessary by the holding's own equipment and with an amount of water normally available.
- << **irrigated area**: an agricultural area of a holding occupied by main temporary crops, permanent crops and permanent meadows and pastures that have been irrigated at least once in the agricultural year.
- << **farms of exclusively rainfed land**: farms that do not have irrigation areas.
- << **farms with predominantly rainfed land**: farms whose irrigated areas account for less than 25% of their UAA.
- << **farms with mainly rainfed land**: farms whose irrigated areas account for between 25% and less than 50% of their UAA.
- << **farms with mainly irrigated land**: farms whose irrigated areas account for between 50% and less than 75% of their UAA.
- << **farms with predominantly irrigated land**: farms whose irrigated areas exceed 75% of their UAA.

>> **Livestock: reduction in the number of holdings and increase in the average size of livestock per holding**

Table 10 >> Livestock, by NUTS II (2016)

| NUTSII | Bovine animals | | | | | Pigs | | | | |
|-----------------|----------------|------|------------|------|----------------|----------|------|------------|------|----------------|
| | Holdings | | Head | | Average size | Holdings | | Head | | Average size |
| | (No.) | (%) | (1000 No.) | (%) | (head/holding) | (No.) | (%) | (1000 No.) | (%) | (head/holding) |
| Portugal | 43 384 | 100 | 1 567 | 100 | 36,1 | 39 672 | 100 | 1 875 | 100 | 47,3 |
| Mainland | 35 251 | 81 | 1 301 | 83 | 36,9 | 35 695 | 90 | 1 841 | 98 | 51,6 |
| Norte | 20 487 | 47,2 | 365 | 23,3 | 17,8 | 12 154 | 30,6 | 65 | 3,4 | 5,3 |
| Centro | 9 689 | 22,3 | 181 | 11,6 | 18,7 | 19 696 | 49,6 | 697 | 37,2 | 35,4 |
| AM Lisboa | 444 | 1,0 | 57 | 3,6 | 127,2 | 224 | 0,6 | 131 | 7,0 | 586,1 |
| Alentejo | 4 374 | 10,1 | 690 | 44,0 | 157,7 | 2 499 | 6,3 | 933 | 49,8 | 373,2 |
| Algarve | 257 | 0,6 | 8 | 0,5 | 29,8 | 1 121 | 2,8 | 15 | 0,8 | 13,6 |
| Açores | 7 466 | 17,2 | 263 | 16,8 | 35,2 | 2 274 | 5,7 | 31 | 1,7 | 13,7 |
| Madeira | 666 | 1,5 | 3 | 0,2 | 4,4 | 1 703 | 4,3 | 3 | 0,2 | 1,8 |

| NUTSII | Sheep | | | | | Goats | | | | |
|-----------------|----------|------|------------|------|----------------|----------|------|------------|------|----------------|
| | Holdings | | Head | | Average size | Holdings | | Head | | Average size |
| | (No.) | (%) | (1000 No.) | (%) | (head/holding) | (No.) | (%) | (1000 No.) | (%) | (head/holding) |
| Portugal | 45 778 | 100 | 2 200 | 100 | 48,1 | 26 635 | 100 | 390 | 100 | 14,7 |
| Mainland | 44 266 | 97 | 2 190 | 100 | 49,5 | 23 312 | 88 | 378 | 97 | 16,2 |
| Norte | 15 465 | 33,8 | 434 | 19,7 | 28,1 | 5 138 | 19,3 | 116 | 29,8 | 22,6 |
| Centro | 18 258 | 39,9 | 510 | 23,2 | 27,9 | 15 008 | 56,3 | 145 | 37,1 | 9,7 |
| AM Lisboa | 1 128 | 2,5 | 38 | 1,7 | 33,6 | 212 | 0,8 | 5 | 1,4 | 25,2 |
| Alentejo | 8 623 | 18,8 | 1 162 | 52,8 | 134,8 | 2 325 | 8,7 | 97 | 24,9 | 41,8 |
| Algarve | 791 | 1,7 | 46 | 2,1 | 57,8 | 628 | 2,4 | 15 | 3,8 | 23,5 |
| Açores | 589 | 1,3 | 5 | 0,2 | 8,1 | 1 202 | 4,5 | 5 | 1,3 | 4,2 |
| Madeira | 923 | 2,0 | 5 | 0,2 | 5,3 | 2 121 | 8,0 | 7 | 1,8 | 3,3 |

The livestock sector's productive structure did not record significant changes, with sheep accounting for 36.5% of total livestock (2,200 thousand heads), followed by pigs (1,875 heads), cattle (1,567 thousand heads), and goats (390 thousand heads).

Cattle was the only species that recorded an increase vis-à-vis 2009 (+9.5%). There were declines in livestock units in goats (-7.2%), pigs (-2.0%), and sheep (-0.9%).



The number of agricultural holdings decreased sharply for all species, notably -20.8% pigs, -18.1% goats, -13.3% cattle, and -11.6% sheep, especially due to the disappearance of small-sized farms.

Figure 10 >> Number of holdings and livestock, by specie (change 2009-2016)

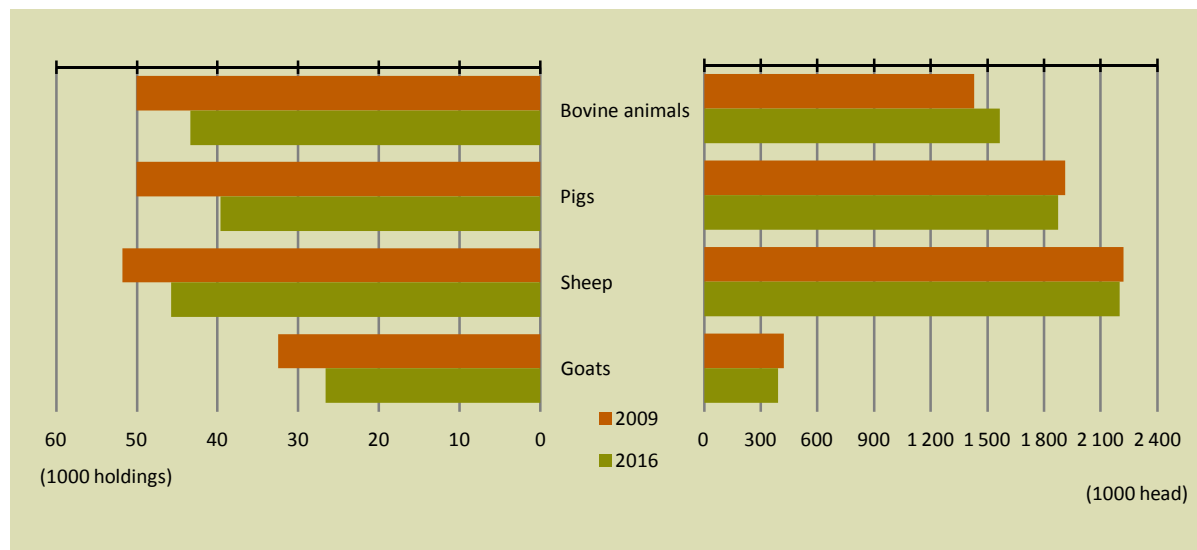
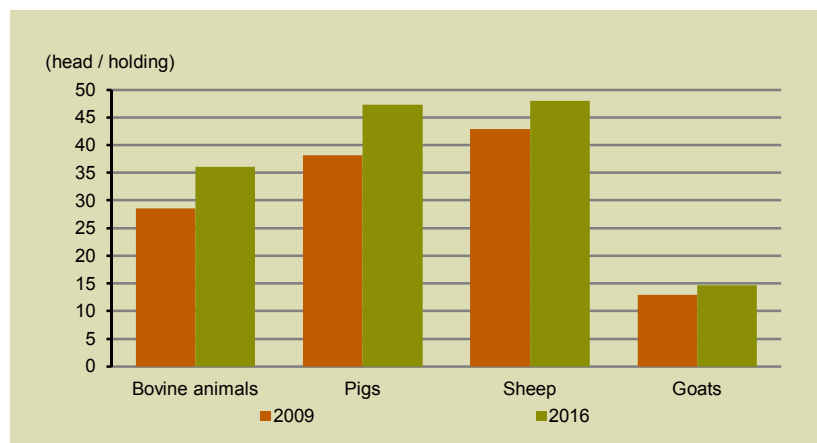


Figure 11 >> Average livestock size, by specie (2009-2016)



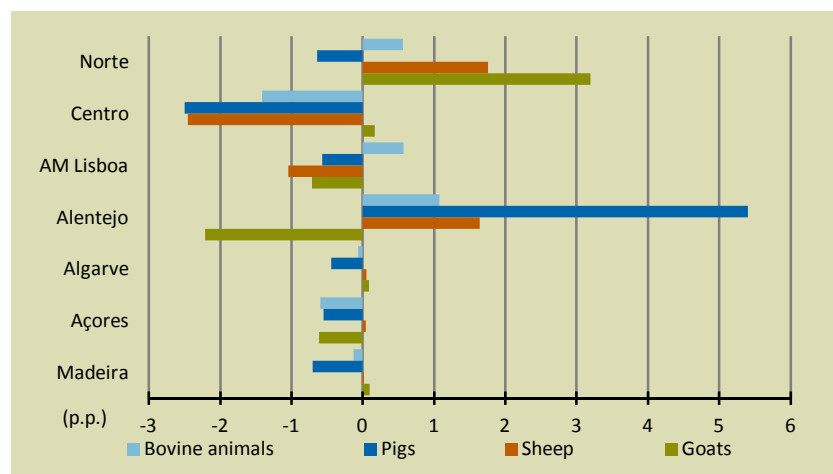
This resulted in an increase in the average size of livestock per holding. The average number of cattle per holding went up from 28.6 heads in 2009 to 36.1 heads in 2016 (+7.5 heads per holding on average). Holdings with pigs had an average of 47.3 heads (+9.1 heads), with sheep 48.1 heads (+5.2 heads) and with goats 14.7 heads (+1.7 heads).



In regional terms, the Alentejo is the country's main livestock region, concentrating more than half of the sheep, 49.8% of pigs and 44.0% of cattle. Goats were predominant in the Centro region, where 37.1% of this livestock was produced nationally.

From 2009 to 2016 the proportion of pig production increased by 5.4 p.p. in the Alentejo (from 44.3% in 2009 to 49.8% in 2016), mainly to the detriment of the Centro region, which lost 2.5 p.p. of its importance at national level. It is also worth mentioning a rise in the proportion of goats in the Norte (+3.2 p.p.), especially to the detriment of the Alentejo region.

Figure 12 >> Livestock structure, by NUTSII (change 2009-2016)



>> The agricultural household declined, accounting for 6.1% of the resident population

Table 11 >> Resident population, agricultural household and family labour force, by NUTSII (Change 2009-2016)

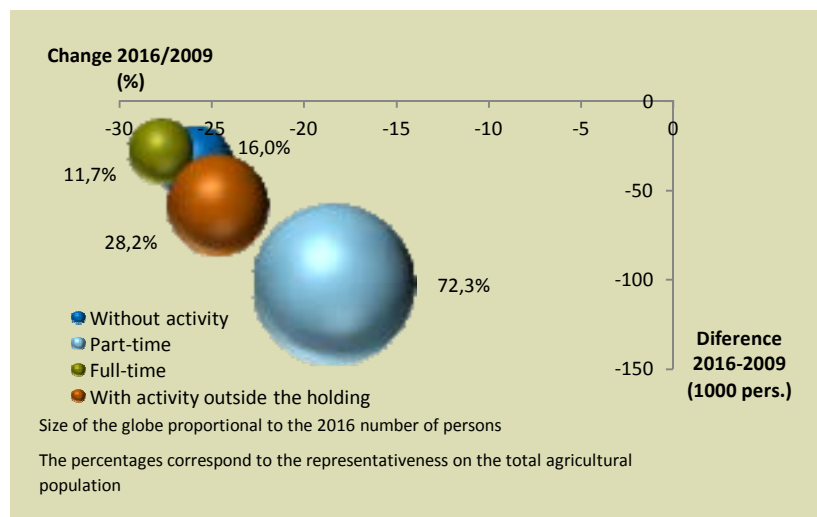
| NUTS II | Resident population estimates (fourth quarter 2016) | | Agricultural household | | | | | |
|-----------|---|-------|------------------------|-------|--------------------|--------------------|--------------------|----------------------------|
| | (1000 No.) | (%) | (No.) | (%) | Change (2009-2016) | Change (2009-2013) | Change (2013-2016) | In the resident population |
| | | | | | (%) | | | |
| Portugal | 10 294 | 100,0 | 627 825 | 100,0 | -20,8 | -15,0 | -6,9 | 6,1 |
| Mainland | 9 796 | 95,2 | 564 670 | 89,9 | -20,5 | -14,8 | -6,7 | 5,8 |
| Norte | 3 577 | 34,8 | 242 479 | 38,6 | -19,7 | -12,9 | -7,8 | 6,8 |
| Centro | 2 244 | 21,8 | 213 519 | 34,0 | -20,3 | -16,9 | -4,2 | 9,5 |
| AM Lisboa | 2 818 | 27,4 | 11 753 | 1,9 | -34,4 | -17,0 | -21,0 | 0,4 |
| Alentejo | 715 | 6,9 | 71 583 | 11,4 | -22,8 | -14,0 | -10,2 | 10,0 |
| Algarve | 442 | 4,3 | 25 336 | 4,0 | -13,3 | -16,3 | 3,6 | 5,7 |
| Açores | 245 | 2,4 | 28 094 | 4,5 | -33,9 | -18,4 | -19,0 | 11,5 |
| Madeira | 254 | 2,5 | 35 061 | 5,6 | -14,0 | -14,2 | 0,2 | 13,8 |

| NUTS II | Agricultural household without farm work | Family agricultural labour force | | | | | | |
|-----------|--|----------------------------------|-----------|--------------------|--------------------|--------------------|---|------|
| | | Part-time | Full-time | Change (2009-2016) | Change (2009-2013) | Change (2013-2016) | With other activity outside the holding | |
| | (No.) | (No.) | (%) | (No.) | (%) | (No.) | In agricultural household (%) | |
| Portugal | 100 355 | 454 049 | 73 422 | -19,8 | -14,0 | -6,8 | 177 017 | 28,2 |
| Mainland | 85 125 | 412 193 | 67 352 | -20,4 | -14,0 | -7,5 | 156 677 | 27,7 |
| Norte | 37 992 | 169 466 | 35 021 | -19,8 | -11,4 | -9,5 | 62 568 | 25,8 |
| Centro | 23 937 | 170 215 | 19 368 | -18,6 | -15,4 | -3,8 | 61 828 | 29,0 |
| AM Lisboa | 2 946 | 6 555 | 2 252 | -41,5 | -23,4 | -23,5 | 3 225 | 27,4 |
| Alentejo | 16 903 | 46 186 | 8 493 | -26,4 | -16,0 | -12,4 | 21 103 | 29,5 |
| Algarve | 3 347 | 19 771 | 2 218 | -12,6 | -15,6 | 3,7 | 7 952 | 31,4 |
| Açores | 9 306 | 14 530 | 4 258 | -27,0 | -14,7 | -14,4 | 7 500 | 26,7 |
| Madeira | 5 924 | 27 325 | 1 812 | -1,9 | -13,6 | 13,6 | 12 840 | 36,6 |

In 2016 the agricultural household was composed of 627.8 thousand persons, i.e. 6.1% of Portugal's resident population. Since 2009 the agricultural household declined by 20.8%.

The agricultural household played a more relevant role in the autonomous regions and in the Alentejo region, while in Área Metropolitana de Lisboa it only accounted for 0.4% of the resident population.

Figure 13 >> Population and family labour force (evolution 2009-2016)



[28,2% of the agricultural household has other gainful activity outside the holding]

The 527.5 thousand persons forming the family labour force carrying out agricultural activities in farms in 2016 (-19.8% than in 2009) accounted for 84.0% of the total, with only 13.9% working full time. A significant share of the family labour force (28.2%) carried out activities unrelated to the agricultural holding (as employees or entrepreneurs).

<< **resident population:** the persons who regardless of the fact that at the moment of observation '0:00 a.m. of the reference day ' are present or absent in a given housing unit, this unit being where they live during most of the year with their family, or where they have all or most of their belongings.
<< **agricultural household:** members of the (sole) holder's domestic household, no matter whether they work on the holding or not, as well as other family members that regularly carry out farm work on the holding but who do not belong to the household.

>> Agricultural sole holders: older and still low skilled

[About 2/3 of the sole holders
are men]

In 2016 agricultural sole holders were mostly men (66.2%) aged 65 on average, with 54.6% aged 65 and over. A large majority of sole holders only completed primary education (71.4%) and only 5.8% had an educational level equivalent to tertiary education.

Table 12 >> Sole holder, by gender, age classes and education level (2016)

| Sole holder profile | Total | | Age classes | | | | | | | | |
|--|-------------|-------|----------------|-------|--------------|-----------------------|-------|--------------|----------------|-------|--------------|
| | | | < 40 years old | | | From 40 to < 65 years | | | ≥ 65 years old | | |
| | (No. pers.) | (%) | (No. pers.) | (%) | In total (%) | (No. pers.) | (%) | In total (%) | (No. pers.) | (%) | In total (%) |
| Total | 246 149 | 100,0 | 9 143 | 100,0 | 3,7 | 102 496 | 100,0 | 41,6 | 134 510 | 100,0 | 54,6 |
| Men | 162 850 | 66,2 | 6 844 | 74,9 | 4,2 | 66 193 | 64,6 | 40,6 | 89 814 | 66,8 | 55,2 |
| Women | 83 299 | 33,8 | 2 299 | 25,1 | 2,8 | 36 303 | 35,4 | 43,6 | 44 696 | 33,2 | 53,7 |
| Educational level | | | | | | | | | | | |
| None | 40 090 | 16,3 | 0 | 0,0 | 0,0 | 4 017 | 3,9 | 10,0 | 36 073 | 26,8 | 90,0 |
| Basic education | 175 848 | 71,4 | 4 600 | 50,3 | 2,6 | 81 024 | 79,1 | 46,1 | 90 223 | 67,1 | 51,3 |
| Secondary education | 15 939 | 6,5 | 2 902 | 31,7 | 18,2 | 9 653 | 9,4 | 60,6 | 3 383 | 2,5 | 21,2 |
| Tertiary education | 14 273 | 5,8 | 1 641 | 17,9 | 11,5 | 7 801 | 7,6 | 54,7 | 4 830 | 3,6 | 33,8 |
| Agricultural training | | | | | | | | | | | |
| Only practical agricultural experience | 134 062 | 54,5 | 3 296 | 36,1 | 2,5 | 49 245 | 48,0 | 36,7 | 81 520 | 60,6 | 60,8 |
| Basic agricultural training | 108 949 | 44,3 | 5 152 | 56,3 | 4,7 | 51 350 | 50,1 | 47,1 | 52 448 | 39,0 | 48,1 |
| Full agricultural training | 3 138 | 1,3 | 695 | 7,6 | 22,1 | 1 901 | 1,9 | 60,6 | 542 | 0,4 | 17,3 |
| Working time | | | | | | | | | | | |
| Full-time | 47 295 | 19,2 | 2 026 | 22,2 | 4,3 | 22 787 | 22,2 | 48,2 | 22 481 | 16,7 | 47,5 |
| Part-time | 198 855 | 80,8 | 7 117 | 77,8 | 3,6 | 79 709 | 77,8 | 40,1 | 112 029 | 83,3 | 56,3 |
| Other gainful activities | | | | | | | | | | | |
| Not directly related to the holding | 58 092 | 23,6 | 5 684 | 62,2 | 9,8 | 46 227 | 45,1 | 79,6 | 6 180 | 4,6 | 10,6 |

In 2016 most holders stated having no professional agricultural training (54.5%), carrying out their activity based solely on their experience (only practical experience). Attendance of agriculture-related professional training courses increased significantly (30.3 p.p. compared to 2013). This was due to compulsory attendance of the application of plant protection products course for obtaining the professional use and application certificate. Only 1.3% of them completed higher education in the field of agroforestry sciences.

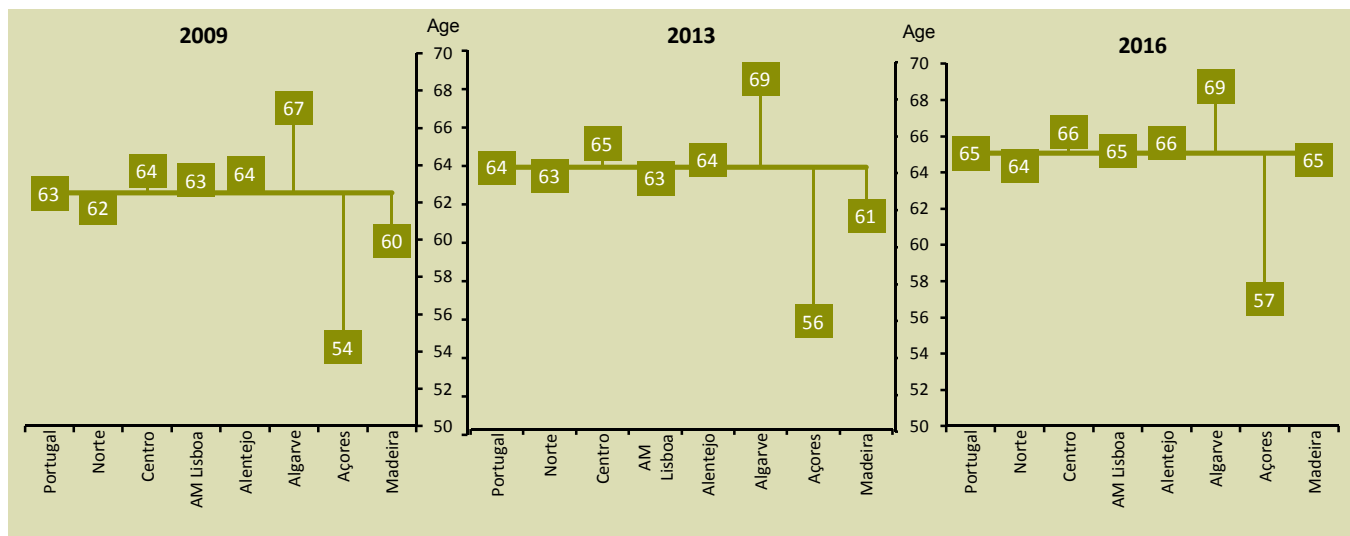
[Less than 1/5 of the holders works full time on their holding]

Sole holders worked on average 17.8 hours a week in 2016, and at least one-fifth worked full time in the holding (225 days or 1,800 hours/year or 40 hours/week). Almost one-fourth of sole agricultural holders (23.6%) stated having a gainful activity other than in the holding. This was more noticeable for younger holders (62.2% of holders aged less than 40 carried out activities complementary to agriculture), while for the older the performance of other activities was virtually residual (4.6%).



The average age of holders increased from 63 to 65 between 2009 and 2016. In regional terms, holders from the Algarve region were the oldest (at an average age of 69) and those from Açores the youngest (57).

Figure 14 >> Average age of the holder (2009-2016)



<< **holder:** the holder of the holding is that natural person or the legal person on whose account and in whose name the holding is operated and who is legally and economically responsible for the holding. The holder reaps the benefits and bears any losses, takes the strategic decisions regarding the production system, investment loans, etc.

<< **sole holder:** a holder that as a natural person encompasses both the autonomous and entrepreneurial facets of ownership. Collective entities, such as companies, cooperatives, the State, etc., are excluded.

<< **primary education:** this level consists of education provided for children, the customary age of entrance being six years, covering nine-years of full-time schooling. Its educational aim is to prepare all participants for further education, or to provide them with a labour-market relevant qualification. It is divided into three sequential cycles of education of four, two and three years respectively. This education level is universal, compulsory and free of charge.

<< **secondary education:** education level corresponding to a three-year cycle (Portuguese 10th, 11th and 12th school years), following the primary education. Its educational aim is to prepare students for further (additional) education or to provide them with a labour-market relevant qualification. In Portugal, it is organised into education-oriented courses/programmes and other more work-oriented courses/programmes.

<< **tertiary education:** education level that comprises university and polytechnic education, for persons with a secondary or equivalent course and those aged 23 and over, who if not having the qualifications referred to, may apply through special examinations.

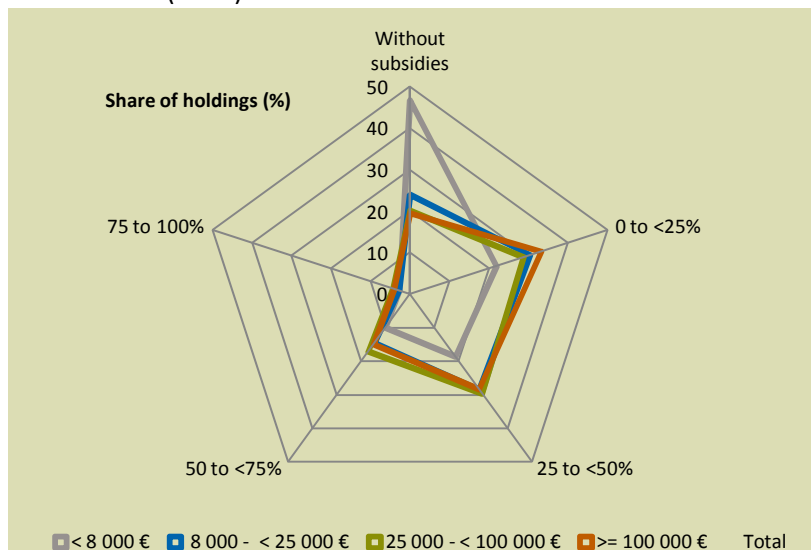
>> Grants and subsidies: over 40% of agricultural holders did not receive subsidies

Holders stated that in 2015/16 around 105 thousand (40.3%) did not qualify for the payment of subsidies from the Agriculture and Fisheries Financing Institute (Portuguese acronym: IFAP), most of them small farmers (85.5% with an economic size equal to or below €8,000).

[46.8% of the very small farms did not receive any subsidy]

However, for more than 154 thousand holders who stated benefiting from the Common Agricultural Policy - CAP (direct payments and/or rural development measures), subsidies, regardless of the economic size, played an important role in the holding's income (one-third stated that subsidies accounted for 25% to 75% of the farm's income). For 2.9% of holders, covering the whole economic size spectrum, grants and subsidies paid by the IFAP accounted for a share of more than 75% of the farm's income.

Figure 15 >> Share of the subsidies in the final output of the holding, by economic size (2016)



[2.9% of the holders declared that the subsidies weight more than 3/4 in the income of the holding]

>> Income of the agricultural holder's household: few lived exclusively of agriculture

Sole holders stating that household income came exclusively from the agricultural holding's activity accounted for only 6.1%. By contrast, in 81.1% of the holder's households income came mostly from a source other than the holding.

Table 13 >> Sources of the sole holder's household income, by economic size classes (2016)

| Economic size classes | Income exclusively from the holding activity | | Income mainly from the holding activity | | Income mainly from a source other than the holding | |
|---|--|------|---|------|--|------|
| | (No. holdings) | (%) | (No. holdings) | (%) | (No. holdings) | (%) |
| Total | 15 122 | 6,1 | 31 463 | 12,8 | 199 565 | 81,1 |
| Very small (< 8 000 Euros) | 4 618 | 2,5 | 12 467 | 6,6 | 170 550 | 90,9 |
| Small (8 000 - < 25 000 Euros) | 4 348 | 11,8 | 9 641 | 26,2 | 22 845 | 62,0 |
| Medium-sized (25 000 - < 100 000 Euros) | 4 174 | 25,1 | 7 073 | 42,6 | 5 363 | 32,3 |
| Large (≥ 100 000 Euros) | 1 982 | 39,1 | 2 281 | 45,0 | 807 | 15,9 |

In very small holdings, with a total SO of less than €8,000, only 2.5% of households received income exclusively from the holding, and most persons (90.9%) stated that income came mainly from sources other than the holding. Conversely, in large holdings, with a total SO of more than €100,000, 39.1% of the holder's households stated receiving income exclusively from the holding, and only 15.9% stated that income other than from the holding's agricultural activity was the most important.



The importance of retirement pensions - naturally related to the advanced age of the agricultural population - in the holder's household income was very high. Virtually two-thirds of the holder's households stated receiving pensions, while 7.1% claimed to complement their agricultural income with another business activity.

[2/3 of the holder's households received pensions]

Table 14 >> Sources of the sole holder's household¹
(2016)

| Sources of the sole holder's household income | Income exclusively from the holding activity | | Income mainly from the holding activity | | Income mainly from a source other than the holding | | Total |
|---|--|-----|---|------|--|------|-------|
| | (No. | (%) | (No. holdings) | (%) | (No. | (%) | (%) |
| Agricultural holding's activity | 15 122 | 6,1 | 31 463 | 12,8 | 199 565 | 81,1 | 100,0 |
| Primary sector salaries | - | - | 1 892 | 0,8 | 10 020 | 4,1 | 4,8 |
| Secondary sector salaries | - | - | 2 924 | 1,2 | 24 770 | 10,1 | 11,3 |
| Tertiary sector salaries | - | - | 6 515 | 2,6 | 46 551 | 18,9 | 21,6 |
| Another business activity | - | - | 2 232 | 0,9 | 15 170 | 6,2 | 7,1 |
| Retirement pensions | - | - | 19 092 | 7,8 | 143 198 | 58,2 | 65,9 |
| Other sources | - | - | 2 188 | 0,9 | 13 196 | 5,4 | 6,3 |

¹ Each sole holder's household may have several sources of income other than the holding activity

>> Non-family labour force accounted for around one-fourth of the agricultural labour volume, which relied mostly on the family structure

[24 thousand farms employed
77 thousand agricultural workers]

In 2016 around 77 thousand regular employees (+53.3% than in 2009 and +20.5% than in 2013) performed regular tasks in 24 thousand holdings (9.3% of the total). Most of these employees worked full time (53.5%) and 14 thousand performed management tasks.

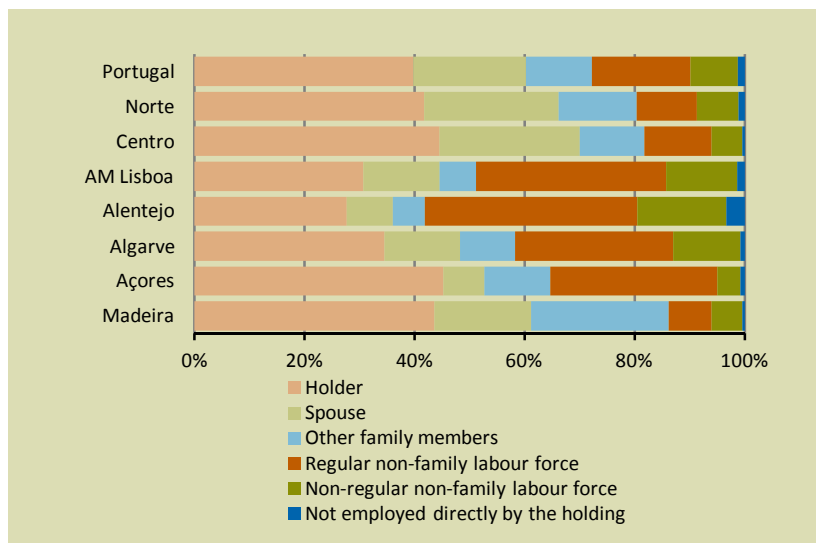
Table 15 >> Non-family labour force, by role, amount of time worked and NUTSII (2016)

| NUTSII | Regular non-family labour force | | | Non-family managers ¹ | | Other non-family labour force | | | |
|-----------------|---------------------------------|--------|----------------|----------------------------------|-------|-------------------------------|-------|-------------|-------------|
| | | | (No. holdings) | (No. pers.) | (%) | Total | | Full-time | Part-time |
| | (No. pers.) | AWU | | | | (No. pers.) | (%) | (No. pers.) | (No. pers.) |
| Portugal | 77 041 | 57 027 | 24 040 | 13 956 | 100,0 | 63 085 | 100,0 | 41 248 | 21 837 |
| Mainland | 71 015 | 52 488 | 21 648 | 13 357 | 95,7 | 57 658 | 91,4 | 37 566 | 20 092 |
| Norte | 21 041 | 14 082 | 8 620 | 4 739 | 34,0 | 16 301 | 25,8 | 8 348 | 7 954 |
| Centro | 14 132 | 11 112 | 4 581 | 2 889 | 20,7 | 11 243 | 17,8 | 7 961 | 3 281 |
| AM Lisboa | 3 685 | 3 233 | 1 195 | 859 | 6,2 | 2 826 | 4,5 | 2 523 | 304 |
| Alentejo | 28 062 | 20 288 | 6 479 | 4 495 | 32,2 | 23 567 | 37,4 | 15 392 | 8 174 |
| Algarve | 4 095 | 3 773 | 774 | 374 | 2,7 | 3 721 | 5,9 | 3 342 | 379 |
| Açores | 4 147 | 3 703 | 1 334 | 495 | 3,5 | 3 652 | 5,8 | 3 247 | 405 |
| Madeira | 1 879 | 836 | 1 057 | 104 | 0,7 | 1 775 | 2,8 | 435 | 1 340 |

¹ Includes the non-family managers of the sole holders and all the managers of the other legal personalities (enterprises, common land, state and public persons and other).

The agricultural labour force was mostly composed of the family labour force (72.2% of AWUs in 2016), with sole holders contributing the greatest work volume (39.8% of AWUs in 2016).

Figure 16 >> Share of the agricultural labour force in AWU, by NUTS II (2016)



Use of contractual agricultural services is still residual (1.3% of the total agricultural labour force)

The non-family agricultural labour force included regular employees, which contributed 17.9% of AWUs, and non-regular employees, which accounted for 8.5% of the volume of farm work. 1.3% of farm work in 2016 resorted to the provision of services (persons not directly employed by the holding).

In the Alentejo region the agricultural labour force was predominantly composed of employees, with 58.2% of AWUs in 2016.

- << **family labour force:** people belonging to the household of a producer who work on the holding and members of the producer's family who do not belong to his/her household but work regularly on the holding.
- << **non-family labour force:** all persons doing farm work for and paid by the agricultural holding other than the holder and members of his/her family.
- << **labour not employed directly by the holder:** persons not directly employed by the holder that perform farm work on the holding, either as self-employed workers or employed by third parties (such as cooperatives or piece-work companies).
- << **regular non-family labour force:** persons who carried out farm work every week on the holding during the 12 months ending on the reference day of the survey, irrespective of length of the working week.
- << **farm manager:** a person responsible for the current, daily management of an agricultural holding and who must have a regular job there. Daily management of the holding is understood to be making decisions every day on work to be done on the holding and operations without any great economic repercussions on the operation of the holding.
- << **annual work unit (a.w.u.):** a unit of measure corresponding to the work performed by 1 person on a full-time basis over a year, measured in hours (1 AWU = 225 working days of 8 hours each).

>> Labour indicators: increase in agricultural labour force productivity and efficiency

Quadro 16 >> Labour indicators, by UAA classes, economic size and legal personality (2009-2016)

| | AWU | Average AWU per holding (AWU/holding) | Average SO per AWU (10 ³ Euros/AWU) | Average AWU per UAA (AWU/100 ha) | Average AWU per LSU (AWU/100 LSU) |
|---|---------|--|---|-------------------------------------|--------------------------------------|
| Total | | | | | |
| 2009 | 367 393 | 1,2 | 12,6 | 10,0 | 16,7 |
| 2013 | 328 658 | 1,2 | 13,7 | 9,0 | 16,1 |
| 2016 | 318 292 | 1,2 | 16,2 | 8,7 | 14,3 |
| Change 2009 -2016 (%) | -13,4 | 2,1 | 28,0 | -12,7 | -14,1 |
| Change 2009 -2013 (%) | -10,5 | 3,3 | 8,6 | -9,9 | -3,1 |
| Change 2013 -2016 (%) | -3,2 | -1,1 | 17,8 | -3,2 | -11,4 |
| UAA classes | | | | | |
| Without UAA | 2 912 | 2,3 | 100,7 | - | 0,9 |
| > 0 a < 1 ha | 39 214 | 0,8 | 4,5 | 147,8 | 56,6 |
| 1 a < 5 ha | 137 312 | 1,0 | 5,7 | 45,1 | 53,9 |
| 5 a < 20 ha | 71 469 | 1,4 | 16,0 | 14,9 | 20,1 |
| 20 a < 50 ha | 25 981 | 2,0 | 31,1 | 6,6 | 9,5 |
| >= 50 ha | 41 404 | 3,8 | 46,8 | 1,7 | 4,4 |
| Economic size classes | | | | | |
| Very small (< 8 000 Euros) | 165 408 | 0,9 | 3,0 | 28,5 | 118,1 |
| Small (8 000 - < 25 000 Euros) | 57 555 | 1,4 | 9,7 | 11,1 | 29,6 |
| Medium-sized (25 000 - < 100 000 Euros) | 42 702 | 2,1 | 23,7 | 4,4 | 10,8 |
| Large (≥ 100 000 Euros) | 52 626 | 5,6 | 58,6 | 3,3 | 3,5 |
| Legal personality | | | | | |
| Sole holder | 261 540 | 1,1 | 11,8 | 11,5 | 21,5 |
| Legal person | 52 167 | 4,6 | 38,4 | 4,4 | 5,3 |
| Other | 4 585 | 3,2 | 21,7 | 0,3 | 27,3 |
| NUTS II | | | | | |
| Norte | 129 193 | 1,3 | 8,7 | 19,8 | 33,8 |
| Centro | 91 216 | 1,0 | 13,3 | 15,6 | 14,7 |
| AM Lisboa | 9 335 | 1,7 | 30,9 | 12,0 | 10,9 |
| Alentejo | 52 455 | 1,5 | 32,8 | 2,5 | 5,9 |
| Algarve | 13 117 | 1,1 | 18,0 | 13,7 | 69,5 |
| Açores | 12 183 | 1,1 | 39,0 | 9,8 | 5,8 |
| Madeira | 10 793 | 0,9 | 7,9 | 220,6 | 123,8 |

The work volume in the agricultural sector declined (-13.4% between 2009 and 2016) and there was a simultaneous improvement in labour indicators related to productivity (expressed in total SO per AWU) and labour efficiency (measured in AWU per ha of UUA and per LU). Each holding resorted on average to 1.2 AWUs, and each AWU generated a total SO of €16.2 thousand (+28.0% than in 2009). On the other hand, 8.7 AWUs were needed, on average, to manage 100 hectares of UAA (against 10.0 AWUs in 2009) and on average 14.3 AWUs were necessary to produce 100 LUs (-14.1% than in 2009).

Productivity in larger holdings was naturally higher than in small farms, each AWU of holdings with 50 hectares or more of UAA generating on average a total SO 10 times that of holdings with less than 1 hectare. When comparing productivity across large holdings with over €100 thousand of total SO, in 2016 each AWU generated a total SO 20 times that of very small holdings. Holdings without UAA have intensive livestock production as agricultural activity, notably poultry farms and industrial pig farms, which was why productivity was very high (€100.7 thousand of total SO per AWU).

Agricultural enterprises, due to their greater size and professionalization, showed more competitive labour indicators, for generating higher total SO per AWU and for resorting to fewer workers for identical activities.

Regionally, holdings in Região Autónoma dos Açores and the Alentejo region recorded the most favourable labour indicators, as opposed to those in the Norte region and Região Autónoma da Madeira, where productivity was lower.

[Each AWU generates an average of 16.2 thousand Euros (+3.5 thousand Euros than in 2009)]

[It takes 8.7 AWU to work 100 hectares of UAA]



>> Other gainful activities of the holding: forestry is the main complement to holdings' activities

Table 17 >> Other gainful activities of the holding, by NUTS II
(2009-2016)

| | Holdings | | | Change (2009-2016) | Change (2009-2013) | Change (2013-2016) |
|---|----------|-------|-----------------|-----------------------|-----------------------|-----------------------|
| | (No.) | (%) | In total (%) | (%) | (%) | (%) |
| Total | 15 905 | 100,0 | 6,1 | 4,1 | 1,8 | 2,2 |
| Tourism, accommodation and other leisure activities | 848 | 5,3 | 0,3 | 40,0 | 11,7 | 25,3 |
| Handicraft | 78 | 0,5 | 0,0 | 0,3 | -67,7 | 210,1 |
| Processing of farm products | 2 387 | 15,0 | 0,9 | 107,9 | 32,1 | 57,4 |
| Forestry ¹ | 10 471 | 65,8 | 4,0 | -3,4 | 5,3 | -8,3 |
| Cork production | 1 282 | 8,1 | 0,5 | -34,1 | 4,3 | -36,9 |
| Other | 9 332 | 58,7 | 3,6 | 2,0 | 3,7 | -1,6 |
| Contractual work | 1 808 | 11,4 | 0,7 | 3,9 | -4,9 | 9,3 |
| Agricultural (for other holdings) | 1 527 | 9,6 | 0,6 | 1,7 | -9,0 | 11,8 |
| Non-agricultural | 416 | 2,6 | 0,2 | 18,5 | 18,6 | -0,1 |
| Wood processing | 72 | 0,5 | 0,0 | -39,3 | 181,3 | -78,4 |
| Aquaculture | 1 | 0,0 | 0,0 | -91,6 | -91,9 | 3,8 |
| Production of renewable energy | 580 | 3,6 | 0,2 | 473,9 | 200,6 | 90,9 |
| For the holding's own use | 154 | 1,0 | 0,1 | 257,2 | 72,4 | 107,2 |
| For the market | 470 | 3,0 | 0,2 | 646,3 | 304,5 | 84,5 |
| Other gainful activities | 608 | 3,8 | 0,2 | -53,4 | -72,4 | 68,6 |
| NUTS II | | | | | | |
| Norte | 2 236 | 14,1 | 0,9 | -25,7 | 5,8 | -29,8 |
| Centro | 10 627 | 66,8 | 4,1 | 29,2 | 19,5 | 8,1 |
| AM Lisboa | 197 | 1,2 | 0,1 | 20,7 | -11,7 | 36,7 |
| Alentejo | 2 021 | 12,7 | 0,8 | -1,4 | -10,5 | 10,1 |
| Algarve | 586 | 3,7 | 0,2 | -63,3 | -73,3 | 37,8 |
| Açores | 220 | 1,4 | 0,1 | 6,3 | -37,7 | 70,6 |
| Madeira | 18 | 0,1 | 0,0 | -43,4 | -48,1 | 9,1 |

¹ Excludes forestry that doesn't use the farm labour force and/or the machinery and equipment of the holding generally used for agricultural purposes.



[15.9 thousand holdings carry out gainful activities complementary to the agricultural activity]

Only 6.1% of holdings carried out complementary activities to agriculture, namely tourism, accommodation and other leisure activities, processing of farm products, forestry, contractual work, production of renewable energy, etc.

[Production of renewable energies with significant growth in the agricultural activity]

Forestry resorting to the holding's labour force, machinery and equipment stood out as the main complementary activity to the holding's agricultural activity, followed by processing of farm products and agricultural and non-agricultural contractual work, with recourse to the holding's equipment. Production of renewable energy was the holding's other gainful activity that evolved the most vis-à-vis 2009 (+473.9%).

>> Continuity of agricultural activity: few want to abandon agriculture

[Almost half of the sole holders mention affective reasons to continue the agricultural activity]

[Only 9.3% of the holders state that economic viability is the main reason for maintaining the activity]

Most sole agricultural holders stated their intention to continue on with their agricultural activity in the next two years (95.1%). The main reasons given for the continuity of agricultural activity were the emotional value (49.3%) and the complement to the family income (31.3%), economic viability having been mentioned by 9.3% of farmers. Motivations naturally varied depending on the economic size, with economic viability assuming a more significant role in larger holdings (61.9%).

Table 18 >> Sole holders that intent to continue on with their agricultural activity in the next two years (2016)

| | Continuity of agricultural activity | | Main reason for the continuity of agricultural activity | | | | | | | | | |
|---|-------------------------------------|----------|---|------|---------------------------------|------|-----------------|------|-----------------------------------|------|-------------|-----|
| | | | Economic viability | | Complement to the family income | | Emotional value | | No other professional alternative | | Other | |
| | (No. pers.) | In total | (No. pers.) | (%) | (No. pers.) | (%) | (No. pers.) | (%) | (No. pers.) | (%) | (No. pers.) | (%) |
| Total | 233 978 | 95,1 | 21 679 | 9,3 | 73 247 | 31 | 115 325 | 49,3 | 20 043 | 8,6 | 3 684 | 1,6 |
| Economic size classes | | | | | | | | | | | | |
| Very small (< 8 000 Euros) | 177 109 | 94,4 | 6 480 | 3,5 | 56 268 | 30,0 | 102 177 | 54,5 | 9 309 | 5,0 | 2 875 | 1,5 |
| Small (8 000 - < 25 000 Euros) | 35 647 | 96,8 | 5 629 | 15,3 | 13 010 | 35,3 | 10 508 | 28,5 | 5 986 | 16,3 | 514 | 1,4 |
| Medium-sized (25 000 - < 100 000 Euros) | 16 236 | 97,7 | 6 434 | 38,7 | 3 517 | 21,2 | 2 290 | 13,8 | 3 790 | 22,8 | 205 | 1,2 |
| Large (≥ 100 000 Euros) | 4 985 | 98,3 | 3 137 | 61,9 | 452 | 8,9 | 350 | 6,9 | 957 | 18,9 | 90 | 1,8 |
| NUTSII | | | | | | | | | | | | |
| Norte | 86 370 | 94,4 | 6 527 | 7,1 | 28 336 | 31,0 | 39 673 | 43,4 | 10 166 | 11,1 | 1 668 | 1,8 |
| Centro | 80 434 | 95,4 | 4 565 | 5,4 | 24 763 | 29,4 | 44 492 | 52,8 | 5 647 | 6,7 | 966 | 1,1 |
| AM Lisboa | 4 876 | 96,8 | 701 | 13,9 | 1 453 | 28,8 | 2 230 | 44,2 | 408 | 8,1 | 84 | 1,7 |
| Alentejo | 29 784 | 95,0 | 4 819 | 15,4 | 6 711 | 21,4 | 16 042 | 51,2 | 1 681 | 5,4 | 532 | 1,7 |
| Algarve | 11 112 | 97,8 | 725 | 6,4 | 2 971 | 26,2 | 6 733 | 59,3 | 453 | 4,0 | 230 | 2,0 |
| Açores | 10 324 | 93,0 | 3 858 | 34,7 | 3 010 | 27,1 | 2 326 | 20,9 | 965 | 8,7 | 164 | 1,5 |
| Madeira | 11 078 | 96,0 | 484 | 4,2 | 6 003 | 52,0 | 3 830 | 33,2 | 723 | 6,3 | 39 | 0,3 |

>> Portuguese agriculture in the European context: the size of holdings did not account for the low productivity of national agriculture

Table 19 >> Strutural and social indicators in EU-28 (2013)

| Countries | Strutural indicators | | | | | | | Social indicators | |
|------------------------|-------------------------|-------------------------------------|---|--|---------------------------------------|---------------|-------------|-----------------------------------|---|
| | Average UAA per holding | Holdings with less than 2 ha of UAA | UAA of the holdings with more than 100 ha | Average economic size (SO per holding) | Agricultural labour input per holding | SO per AWU | UAA per AWU | Manager with 65 years old or more | More than 50% of production self-consumed by the holder |
| | (ha/holding) | (%) | | (Euro/holding) | (AWU/holding) | (Euro/AWU) | (ha/AWU) | (%) | |
| EU-28 | 16,1 | 44,1 | 52,0 | 30 550 | 0,9 | 34 830 | 18,4 | 31,1 | 11,0 |
| Germany | 58,6 | 4,3 | 57,0 | 162 271 | 1,8 | 88 482 | 31,9 | 6,5 | 0,0 |
| Austria | 19,4 | 10,4 | 16,4 | 40 385 | 0,8 | 51 018 | 24,5 | 8,6 | 0,0 |
| Belgium | 34,6 | 4,3 | 24,4 | 222 634 | 1,5 | 148 187 | 23,1 | 21,2 | // |
| Bulgaria | 18,3 | 75,0 | 83,6 | 13 111 | 1,3 | 10 416 | 14,5 | 36,7 | 33,2 |
| Cyprus | 3,1 | 74,9 | 16,9 | 14 003 | 0,5 | 29 934 | 6,6 | 40,0 | 55,0 |
| Croatia | 10,0 | 38,6 | 40,1 | 12 888 | 1,1 | 11 592 | 9,0 | 30,3 | 51,8 |
| Denmark | 68,4 | 0,8 | 69,0 | 250 267 | 1,4 | 180 181 | 49,3 | 24,2 | 0,0 |
| Slovakia | 80,7 | 26,8 | 90,4 | 76 887 | 2,1 | 35 815 | 37,6 | 21,6 | 51,4 |
| Slovenia | 6,7 | 25,4 | 7,0 | 13 943 | 1,1 | 12 241 | 5,9 | 25,3 | 59,4 |
| Spain | 24,1 | 26,8 | 55,5 | 37 284 | 0,8 | 44 225 | 28,6 | 33,3 | 0,4 |
| Estonia | 49,9 | 9,4 | 73,5 | 35 243 | 1,1 | 30 658 | 43,4 | 30,4 | 31,4 |
| Finland | 42,0 | 1,6 | 30,3 | 62 464 | 1,1 | 59 045 | 39,7 | 10,2 | 0,0 |
| France | 58,7 | 11,1 | 61,9 | 120 527 | 1,5 | 78 536 | 38,3 | 12,4 | 2,4 |
| Greece | 6,8 | 51,0 | 34,8 | 11 421 | 0,7 | 17 469 | 10,5 | 31,3 | 18,0 |
| Netherlands | 27,4 | 10,5 | 20,0 | 303 765 | 2,3 | 133 703 | 12,1 | 21,0 | 0,0 |
| Hungary | 9,5 | 73,9 | 64,4 | 11 352 | 0,9 | 12 861 | 10,7 | 30,3 | 64,4 |
| Ireland | 35,5 | 1,7 | 23,2 | 35 906 | 1,2 | 30 622 | 30,3 | 26,5 | 0,0 |
| Italy | 12,0 | 27,5 | 26,9 | 43 346 | 0,8 | 53 609 | 14,8 | 39,7 | 13,1 |
| Latvia | 23,0 | 21,8 | 53,1 | 12 103 | 1,0 | 12 060 | 22,9 | 30,0 | 68,1 |
| Lithuania | 16,7 | 14,1 | 46,6 | 11 171 | 0,8 | 13 257 | 19,8 | 34,0 | 56,3 |
| Luxemburg | 63,0 | 8,7 | 53,7 | 150 871 | 1,7 | 88 899 | 37,1 | 14,4 | // |
| Malta | 1,2 | 84,4 | // | 10 341 | 0,5 | 21 751 | 2,4 | 25,1 | 32,3 |
| Poland | 10,1 | 22,9 | 21,1 | 15 254 | 1,3 | 11 361 | 7,5 | 9,6 | 37,7 |
| Portugal (2016) | 14,1 | 45,8 | 58,0 | 19 863 | 1,2 | 16 162 | 11,4 | 51,9 | 42,0 |
| United Kingdom | 94,7 | 2,2 | 74,8 | 119 201 | 1,5 | 79 479 | 63,1 | 30,5 | // |
| Czech Republic | 133,0 | 10,4 | 87,8 | 169 408 | 4,0 | 42 320 | 33,2 | 23,0 | 19,2 |
| Romania | 3,6 | 72,7 | 48,3 | 3 303 | 0,4 | 7 722 | 8,4 | 41,0 | 87,6 |
| Sweden | 45,2 | 1,1 | 55,2 | 69 674 | 0,9 | 78 870 | 51,2 | 30,0 | 0,0 |

Source: Eurostat

The average size of national agricultural holdings (14.1 hectares of UAA/holding in 2016) was lower than holdings in the EU28 on average (16.1 hectares of UAA/holding in 2013). Small holdings, with less than 2 hectares of UAA, accounted for 45.8% in Portugal, i.e. slightly more than in the EU28 in 2013 (44.1%). However, in Portugal large holdings with over 100 ha of the UAA, accounted for 58.0% of the UAA, i.e. 6 p.p. than in the EU28.



[Average size of the Portuguese holdings (14.1 hectares) below the European average (16.1 hectares)]

[The concentration of UAA in the very large farms is more pronounced in Portugal than in the EU28]

Most of the Portuguese territory (Norte, Centro, Algarve and Região Autónoma da Madeira) had one of the lowest average sizes of holdings in Europe (< 10 hectares per holding). By contrast, the Alentejo region had larger-sized holdings that rivalled those in Spain and northern and central Europe.

[Agricultural holdings from the Alentejo region far in excess of the European average]

Figure 17 >> Average size of holding in EU-28, by NUTS II (2013)

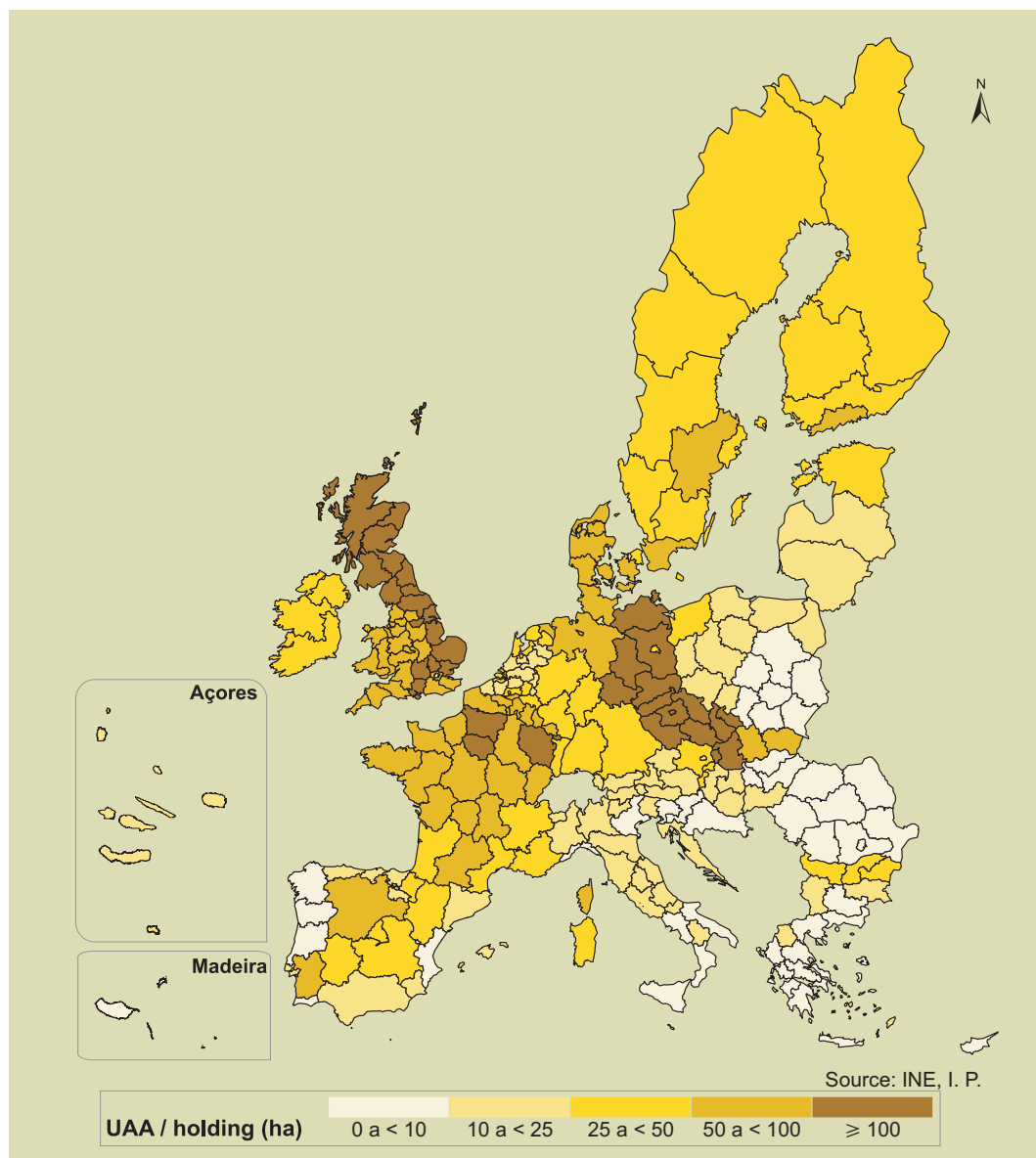
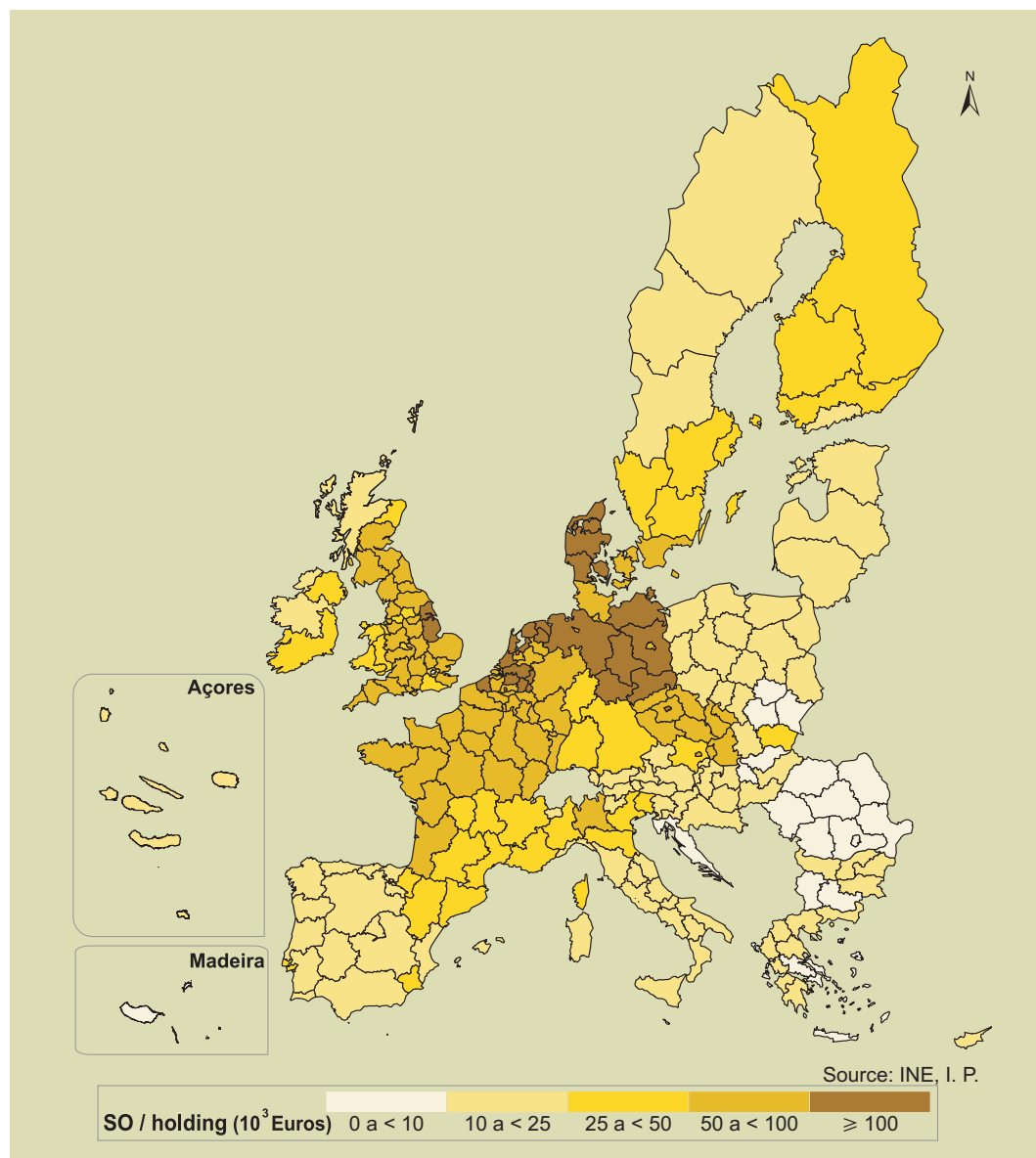


Figure 18 >> Average economic size of the holdings in EU-28, by NUTS II (2013)



An analysis of the average economic size of national holdings in the European context showed a similar scenario to that of the physical size. The average total SO of Portuguese holdings was considerably lower than that of holdings in the EU28 (-35.0%), but the economic sizes in Área Metropolitana de Lisboa, the Alentejo region and Região Autónoma dos Açores were higher than the European average. The difference in the size of holdings between countries in central Europe and those in the periphery of Europe was more marked in terms of economic size than of physical size.

[Average economic size of Portuguese farms is less than 2/3 of the EU28 average]

Portuguese agriculture is unproductive compared to the EU28 average. In 2013 average agricultural labour force productivity in the EU28 was €34.8 thousand of total SO per AWU, i.e. more than double the value reached in Portugal in 2016. In addition, agricultural labour force efficiency, expressed in UAA per AWU, although depending on the type of productive system, was higher in the EU28, where each AWU farmed on average 18.4 hectares of UAA, i.e. 7 hectares more than in Portugal.

[Productivity of the Portuguese agricultural labour force (16,100 Euros/AWU) well below the European average (34,800 Euros/AWU)]

The managers of holdings in Portugal are the oldest of the EU28. More than half were aged 65 and over, i.e. a much higher representativeness than that of the EU28 in 2013 (31.1%).

[Portuguese farm managers are the eldest of the EU28]

Figure 19 >> Standard output (SO) per Annual work unit (AWU) (2013)

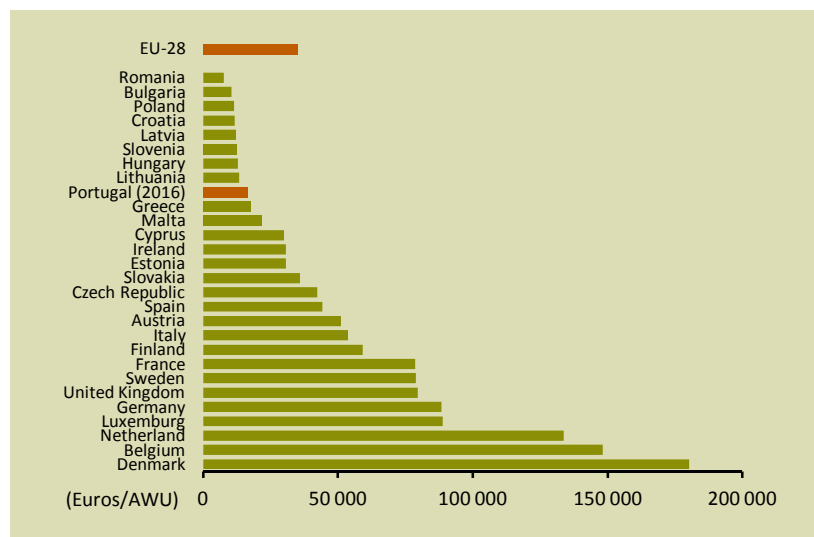
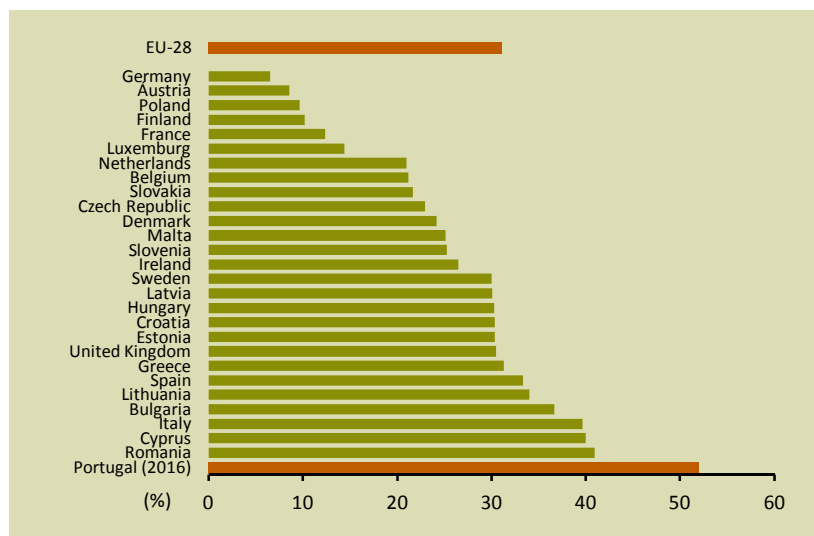


Figure 20 >> Share of farm managers aged 65 years or more (2013)



An abstract background featuring a light green gradient. A dark green geometric shape, resembling a stylized 'V' or a mountain peak, is positioned on the left side, extending from the top left towards the bottom center. A horizontal dark green bar is located on the right side, intersecting the lower part of the 'V' shape.

www.ine.pt