

Agriculture in Flanders



► **Sagiter October 5th 2016**



Lifelong
Learning
Programme

VLAAMSE
LAND
MAATSCHAPPIJ

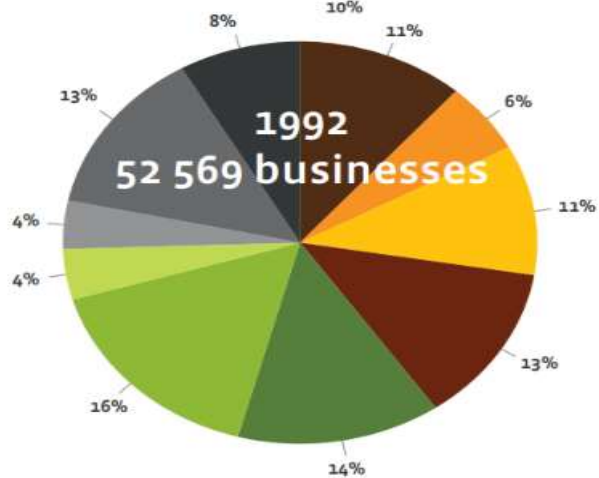
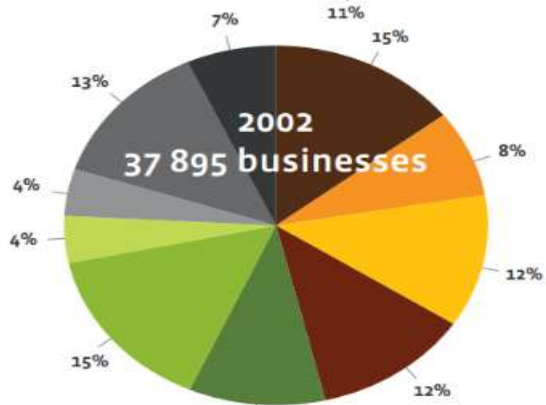
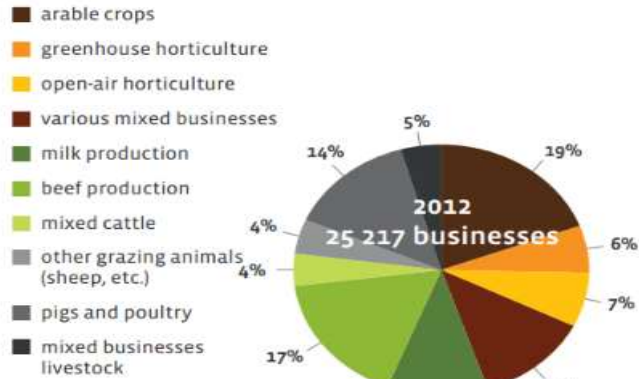
Content of the presentation

- ▶ Agricultural sector in Flanders
- ▶ Agricultural farms in Flanders
- ▶ Some problems of agricultural farms/sector

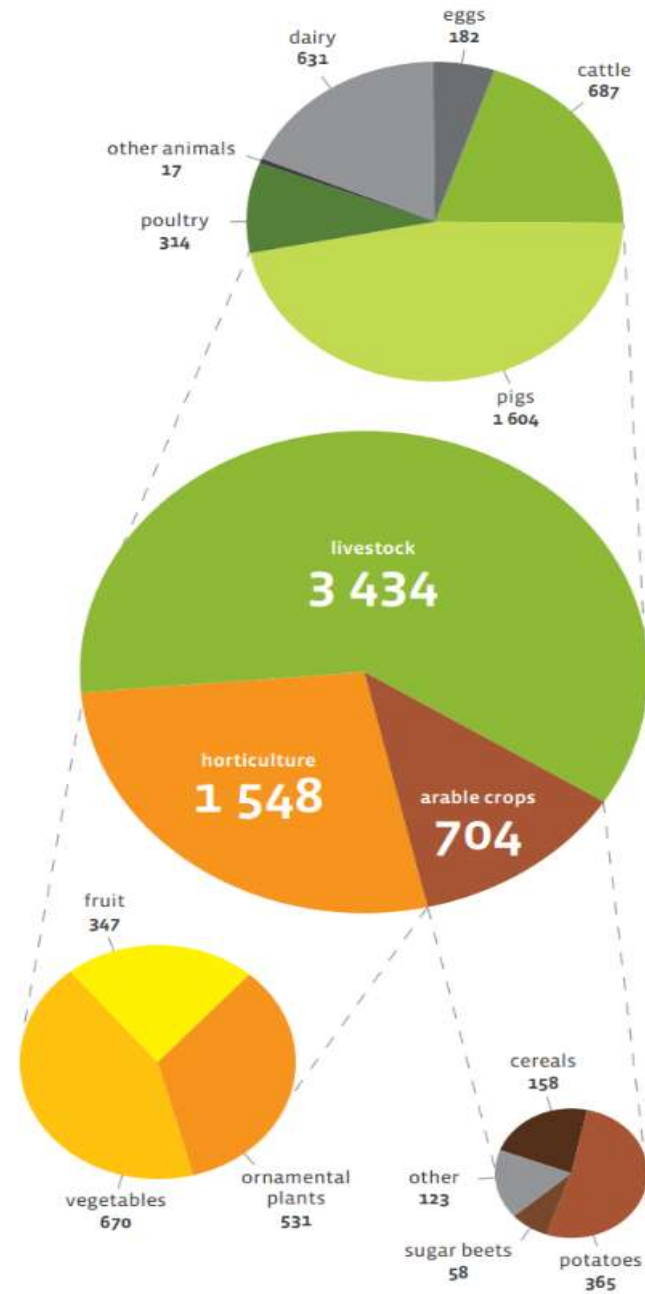
Agricultural in Flanders: main facts

- ▶ 600.000 - 750.000 ha agricultural land (36% owned by farmers) or 46% of the total surface area in Flanders
- ▶ 2,3% of the overall working population is employed in agricultural sector.
- ▶ 1,5% of region's gross domestic product
- ▶ Intensive agricultural and horticultural system with high level of production
- ▶ Family farms
- ▶ Growing specialisation

Specialisation of agricultural businesses

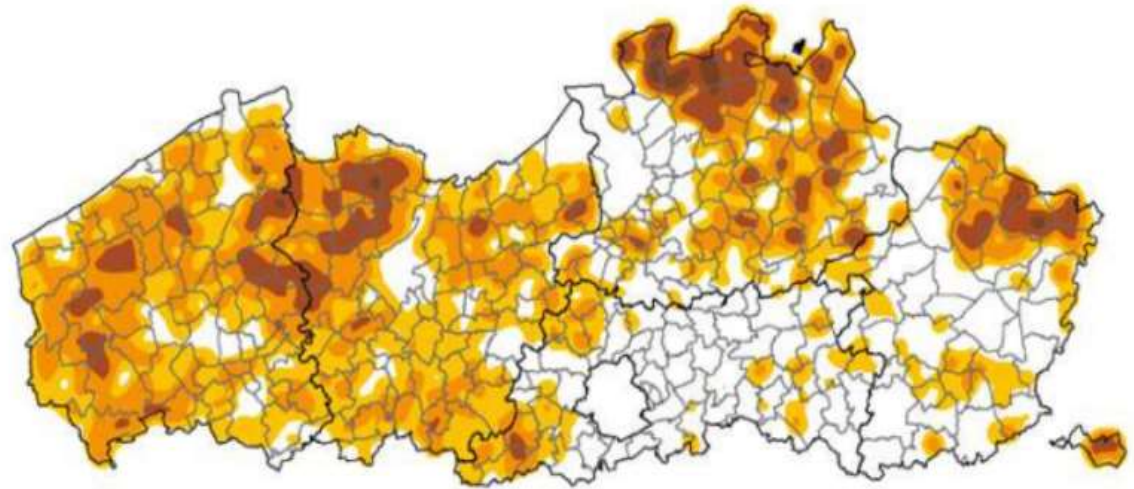


Production value of agriculture and horticulture, million euro, 2012

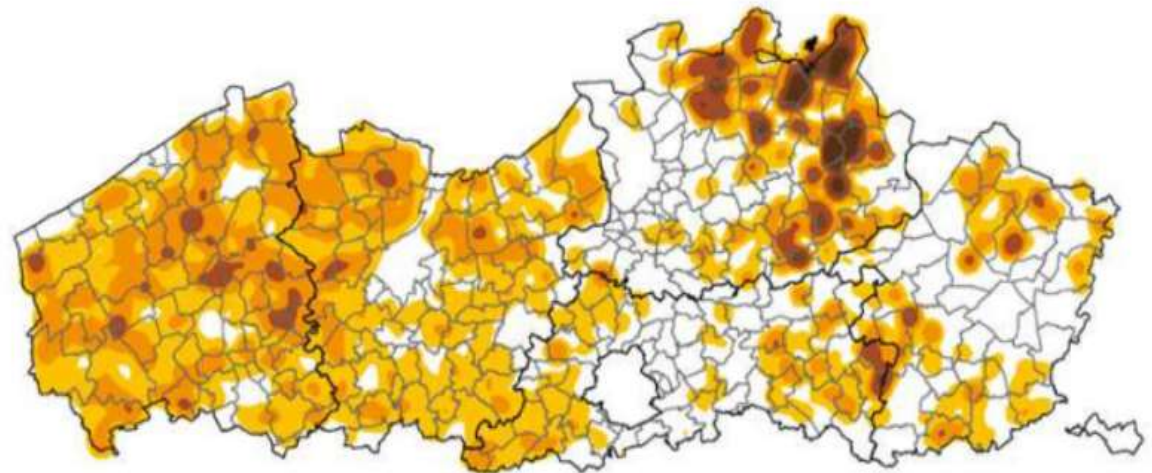


Regional importance of milk and meat production

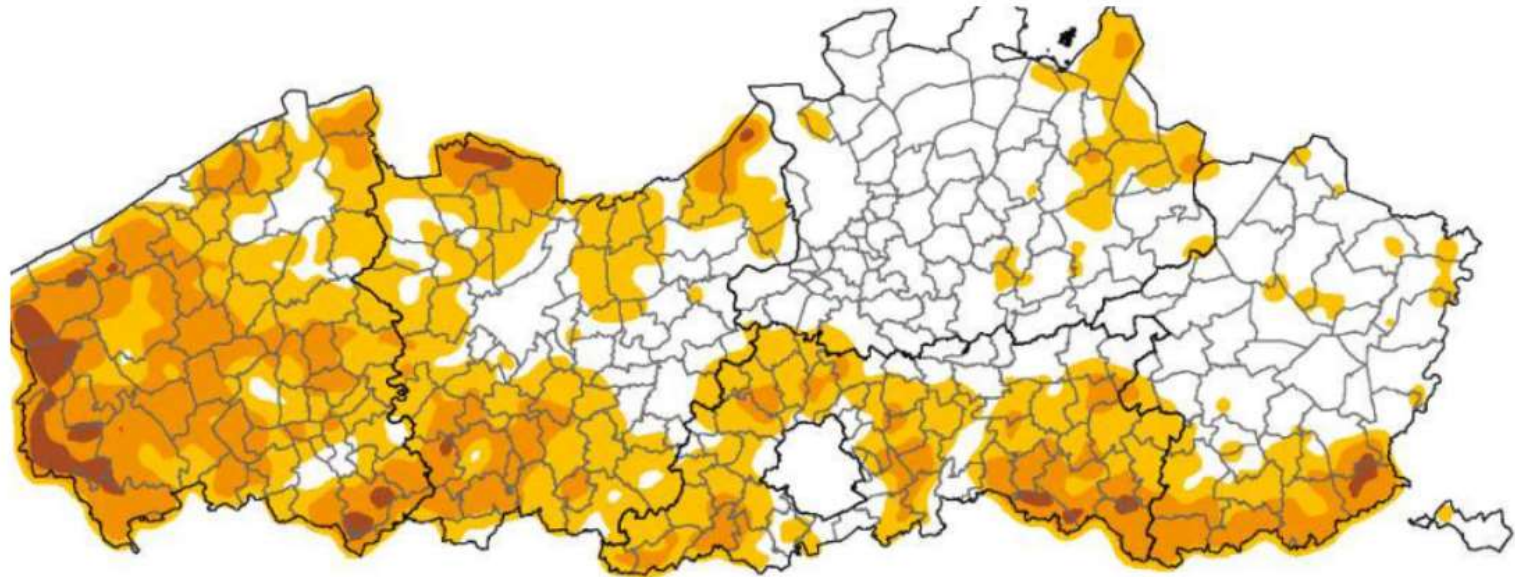
Milk



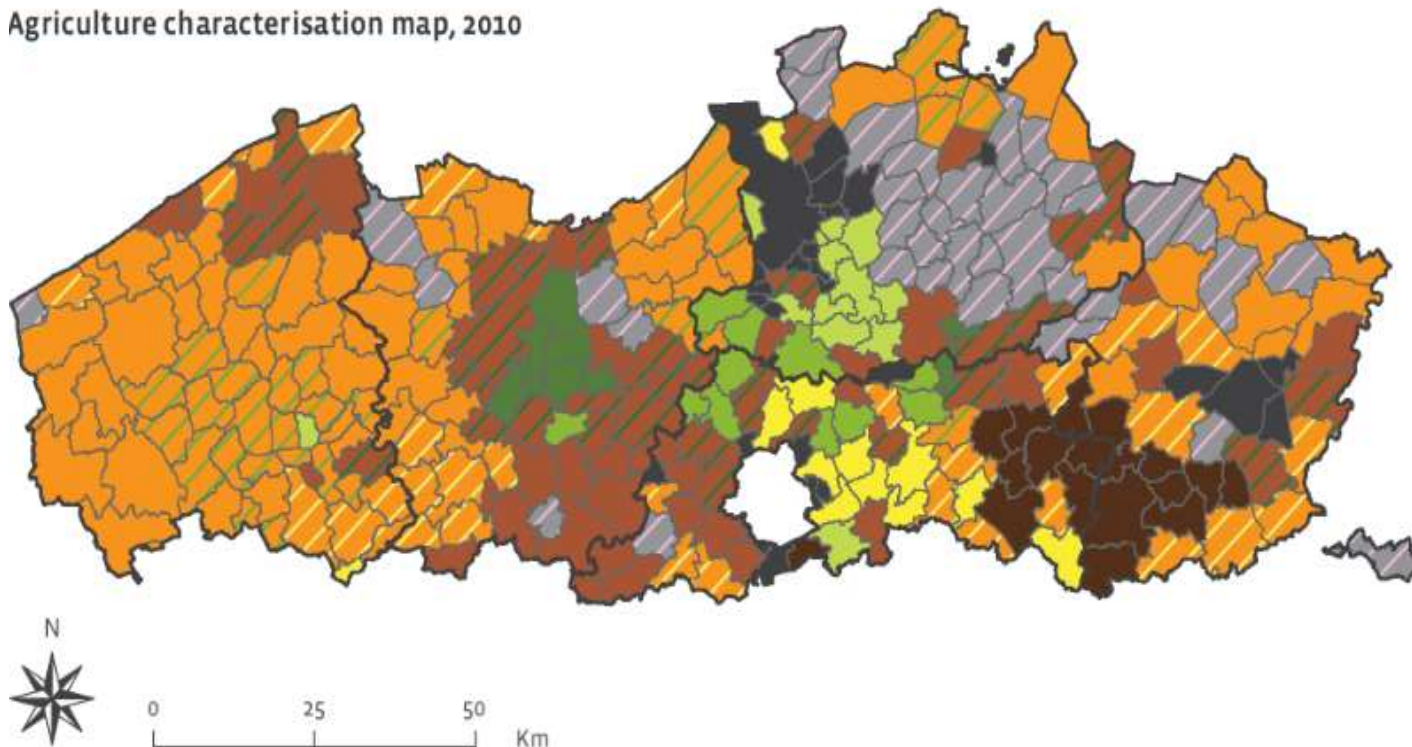
Meat



Regional importance of the arable sector



Agriculture characterisation map, 2010



- specialisation pigs and poultry
- dairy cattle - pigs and poultry
- pigs and poultry - vegetables
- beef cattle - ornamental plants
- specialisation greenhouse vegetables
- pigs and poultry - arable crops
- specialisation beef cattle
- specialisation fruit
- specialisation ornamental plants
- specialisation open-air vegetables
- prevailing arable crops
- urbanised

Source:
 Agriculture and Fisheries



Intensive agricultural and horticultural system with high level of production

Yield and output				
		2005	2010	2011
wheat	kg/ha	8 550	9 250	8 439
store potatoes	kg/ha	45 150	43 835	53 726
sugar beets	kg/ha	68 080	74 640	85 050
milk yield	liter/cow	6 612	7 253	7 354
raised piglets	number/sow	19.9	22.9	23.3
litters	number/sow	2.16	2.20	2.20
meat pig growth	g/day	610	639	652
fodder conversion meat pigs	kg concentrate/ kg growth	2.98	2.90	2.92



Source:

Significant Belgium agricultural trade:

- ▶ Trade in agricultural products contains 10,5 % of total Belgian import and 11,6% of total Belgian export
- ▶ Estimation: $\frac{3}{4}$ food products and 80% of Flanders
- ▶ Still increasing: 2015 41,9 export and 35,9 import

Belgian agricultural trade, million euro, 2012

	imports	exports	saldo
arable products	13 177	13 134	-43
horticultural products	6 025	6 565	540
animal products	5 898	7 898	2 000
agro-industrial products	3 019	4 847	1 828
other products (fish, drink, etc.)	5 534	5 923	389
total	33 653	38 367	4 714



Most important (Belgian) export products

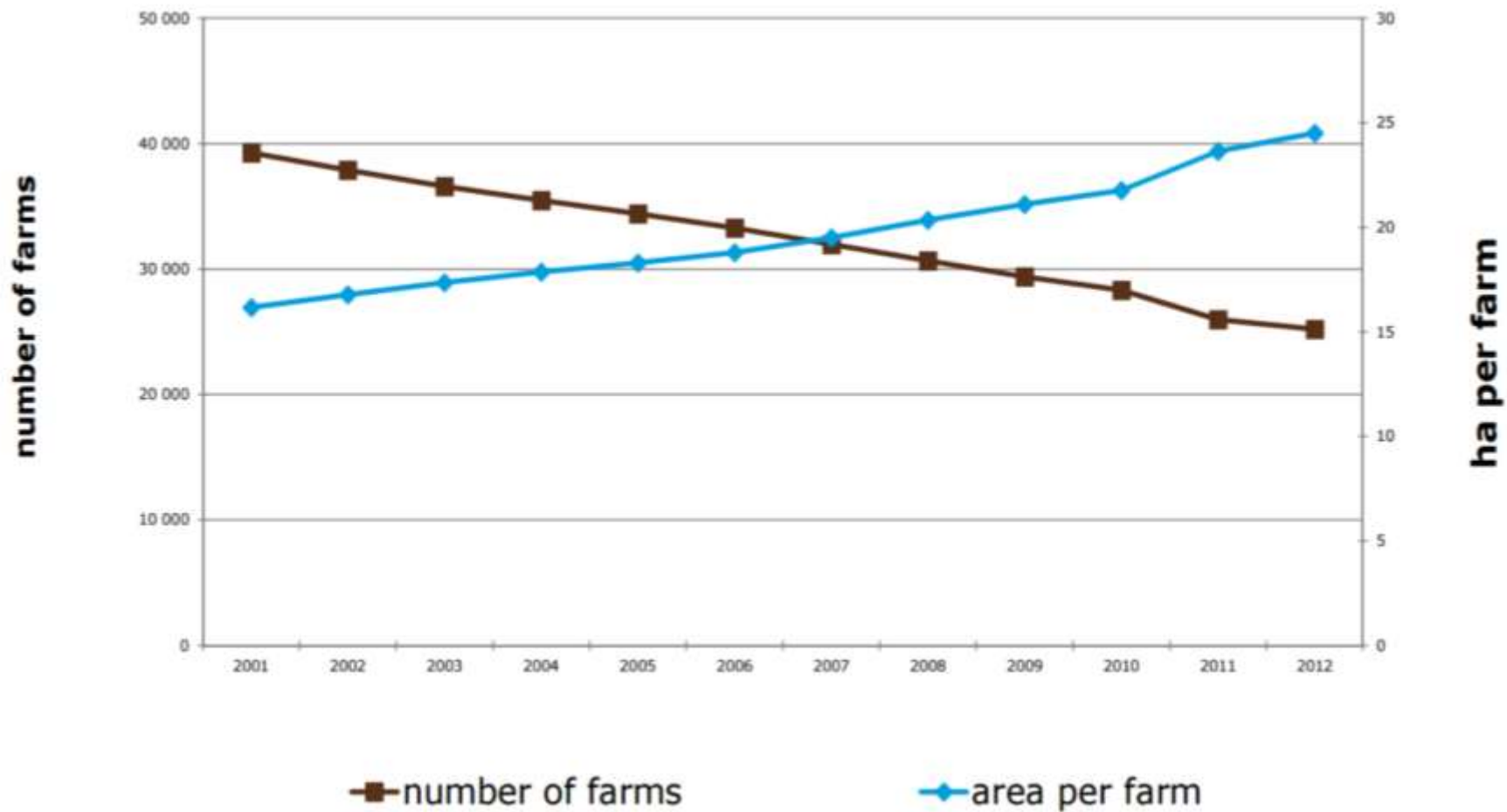
Most important export products, million euro and ranking		
	exports (2012)	world ranking (2011)
frozen vegetables	1 033	1
potato preparations	1 287	2
chocolate products	2 011	2
confectionary products	1 399	2
pears	206	3
beer	1 053	4
pork	1 336	5
apples	126	10

Structural characteristics

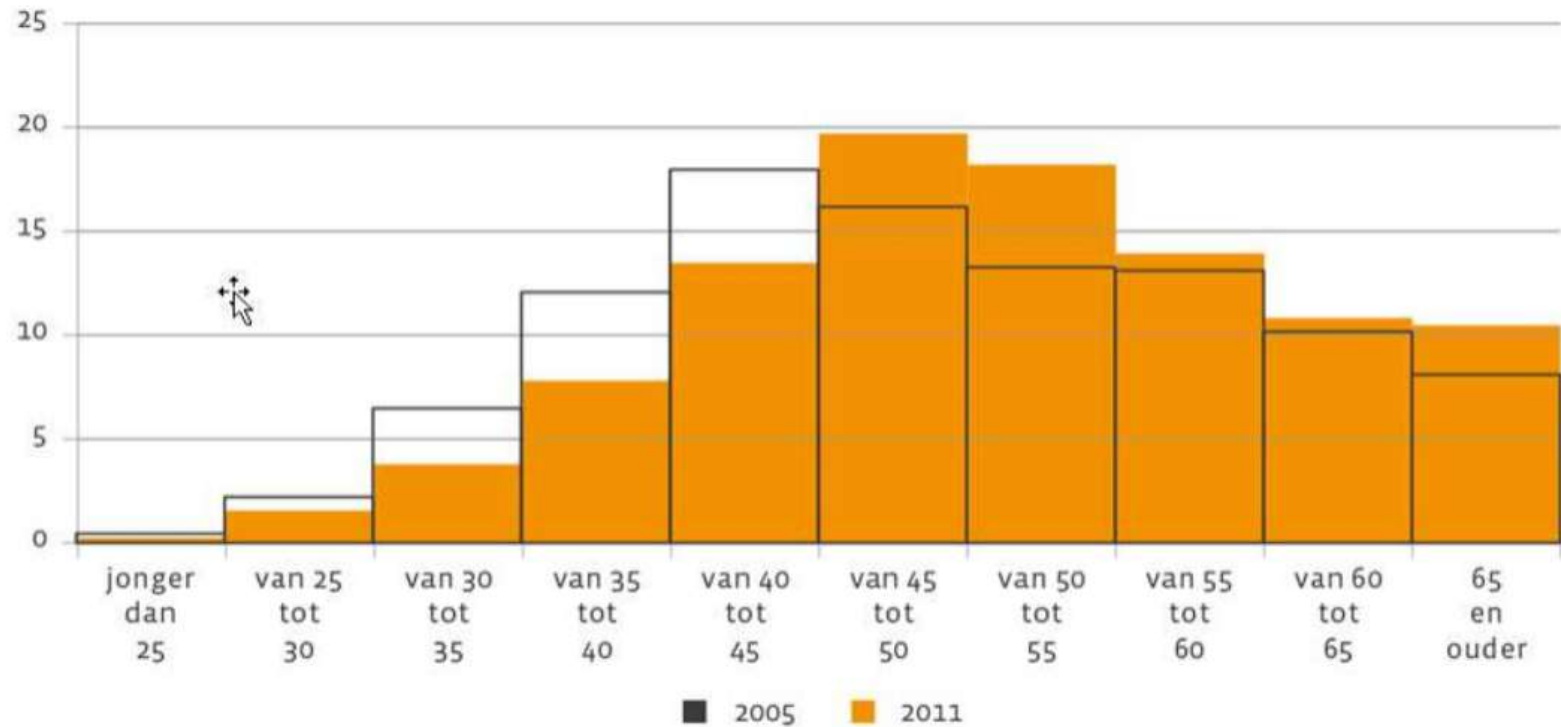
Source:



Structural characteristics				
	unity	2005	2011	2012
agricultural businesses	number	34 410	25 982	25 217
agricultural area	ha	629 684	613 860	618 183
owned land	%	33.8%	34.9%	35.6%
average area of businesses	ha	18.3	23.6	24.5
companies	%	6.8%	12.5%	13.7%
cattle	number	1 350 304	1 302 248	1 269 405
pigs	number	5 952 518	6 151 167	6 227 520
poultry	number	30 385 744	31 628 280	30 151 029
cattle per cattle business	number/ business	87	111	116
pigs per pig business	number/ business	1 311	1 700	1 771
chickens per poultry business	number/ business	32 171	42 606	41 036
new businesses that applied for start-up support	number	222	184	158

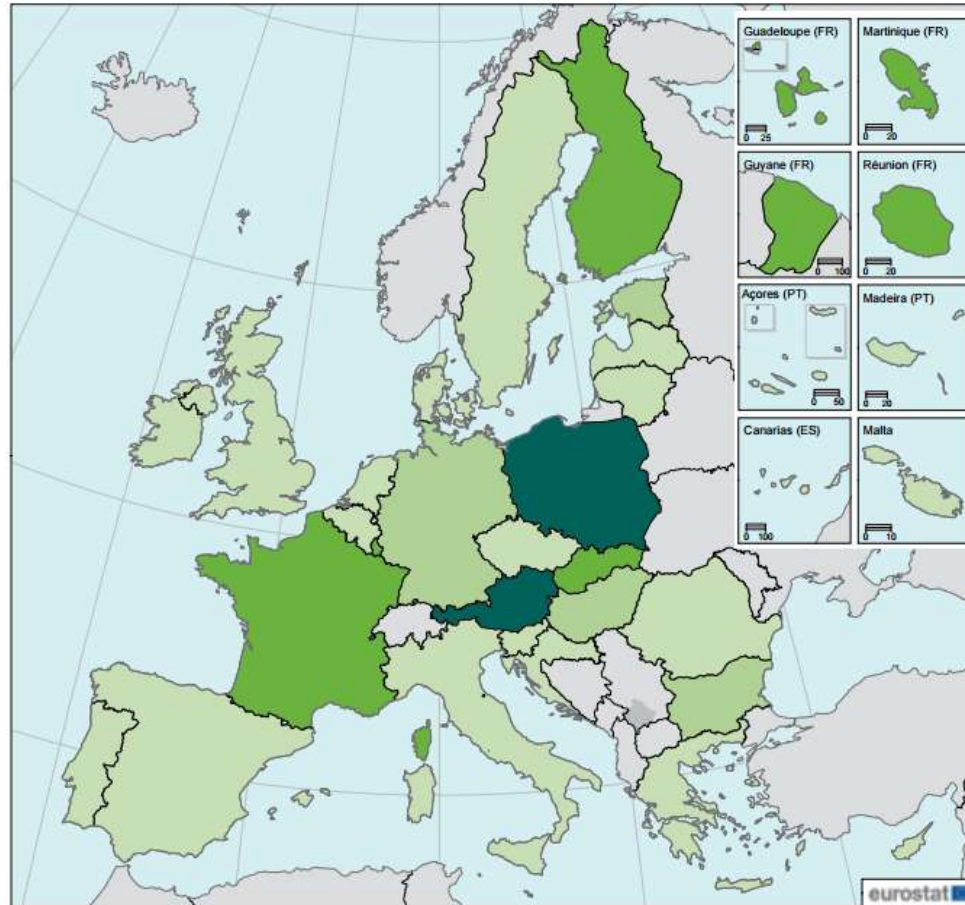


Age pyramid of the farmers of professional farms

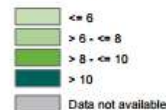


Share of farm managers aged less than 35 years

Map 2.2: Share of farm managers aged less than 35 years, 2013
(% of total number of managers)



EU-28 = 6.0%

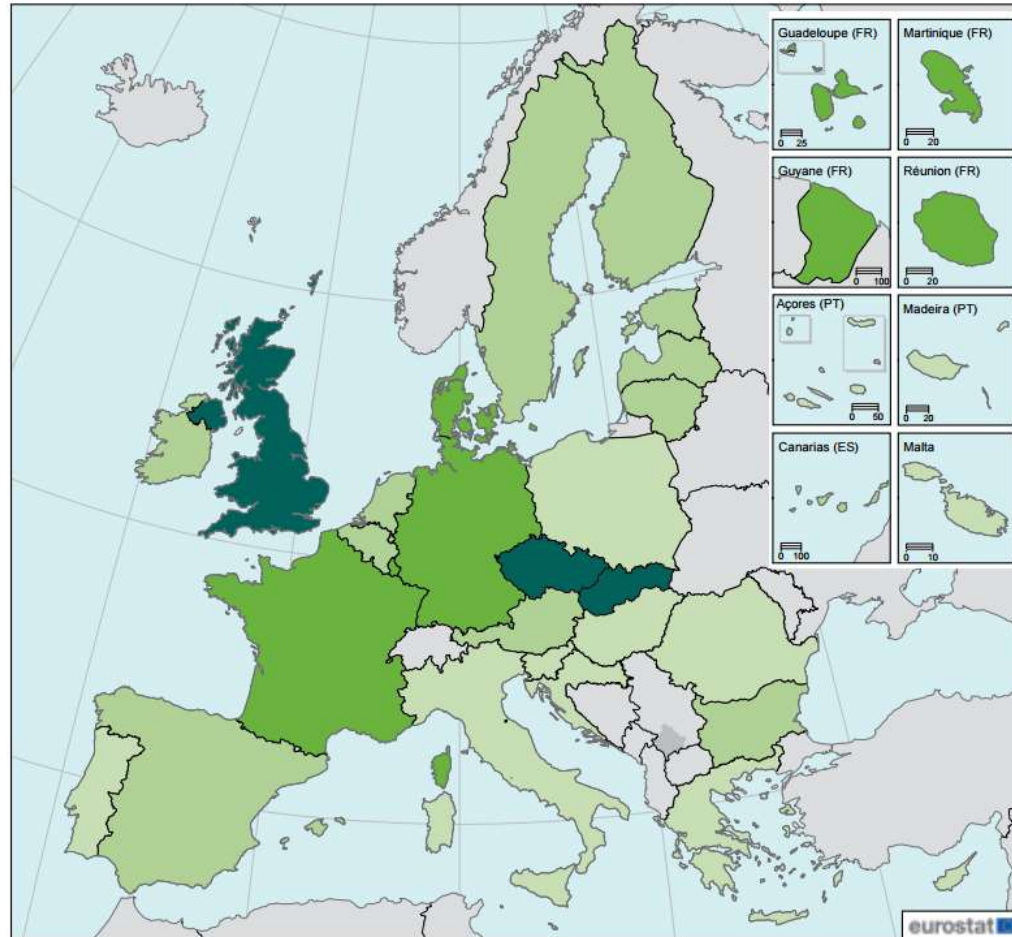


Administrative boundaries: © EuroGeographics © UN-FAO © Turkstat
Cartography: Eurostat — IMAGE, 12/2015

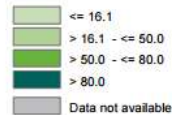


Average utilised agricultural area per holding

Map 2.1: Average utilised agricultural area per holding, 2013
(hectares)



EU-28= 16.1 hectares



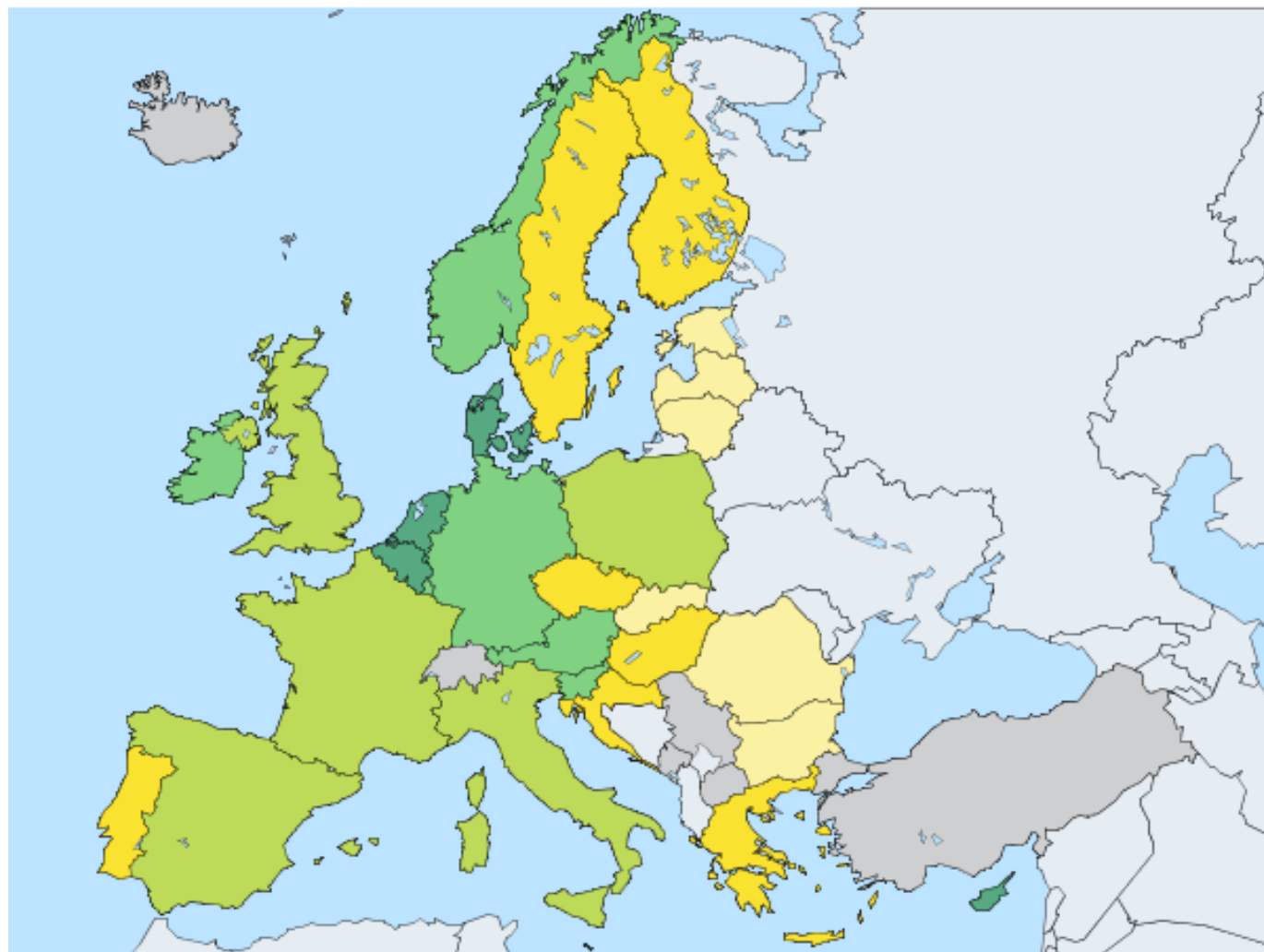
Administrative boundaries: © EuroGeographics © UN-FAO © Turkstat
Cartography: Eurostat — IMAGE, 12/2015



Source: Eurostat (online data code: ef_kvaereg)

Livestock density index

Livestock units per ha - 2013



Legend

0.22 - 0.38

0.38 - 0.56

0.56 - 0.79

0.79 - 1.26

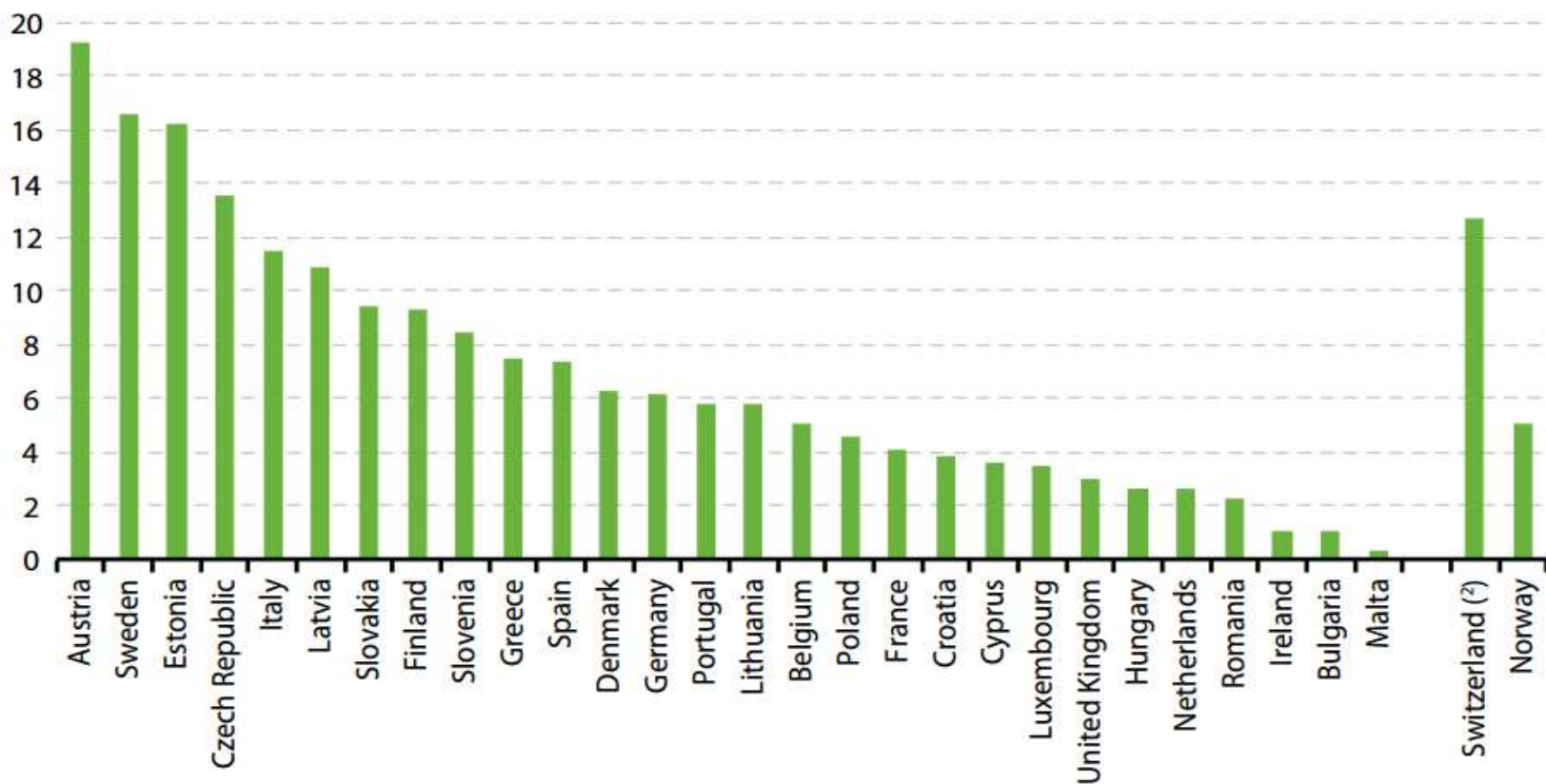
1.26 - 3.57

Not available

Minimum value:0.22 Maximum value:3.57

Figure 5.3: Share of total organic area (fully converted and under conversion) in total utilised agricultural area (UAA), 2014 ⁽¹⁾

(%)



⁽¹⁾ 2014 data on organic farming area compared with 2013 FSS data on total UAA.

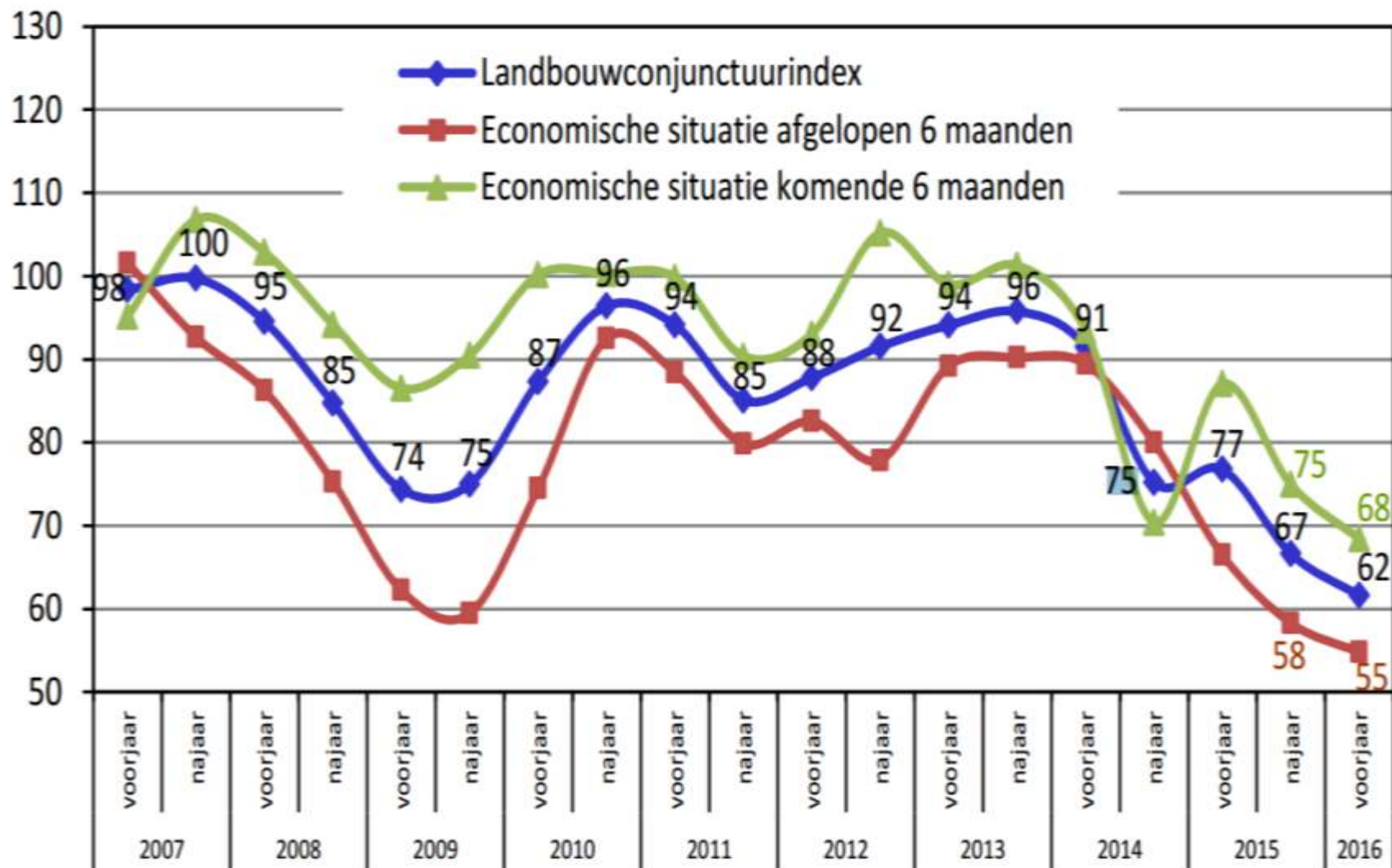
⁽²⁾ 2010 data on FSS used in the case of Switzerland.

Source: Eurostat (online data codes: [org_cropap](#) and [ef_kvaareg](#))

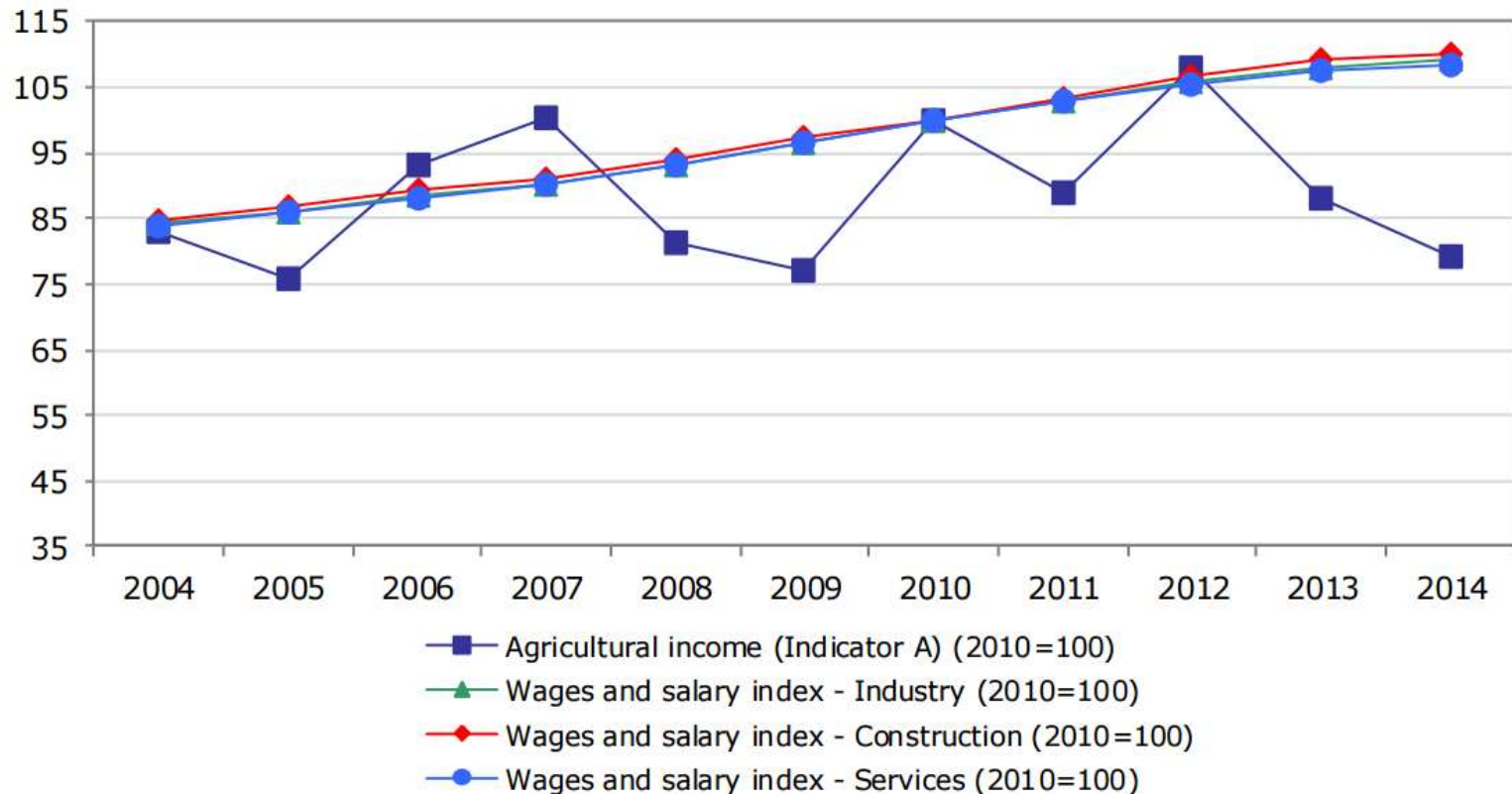
Main problems of agricultural farms?

- ▶ Income
- ▶ Environmental impact
- ▶ Scarce farmland
- ▶ ...

Agricultural sentiment index

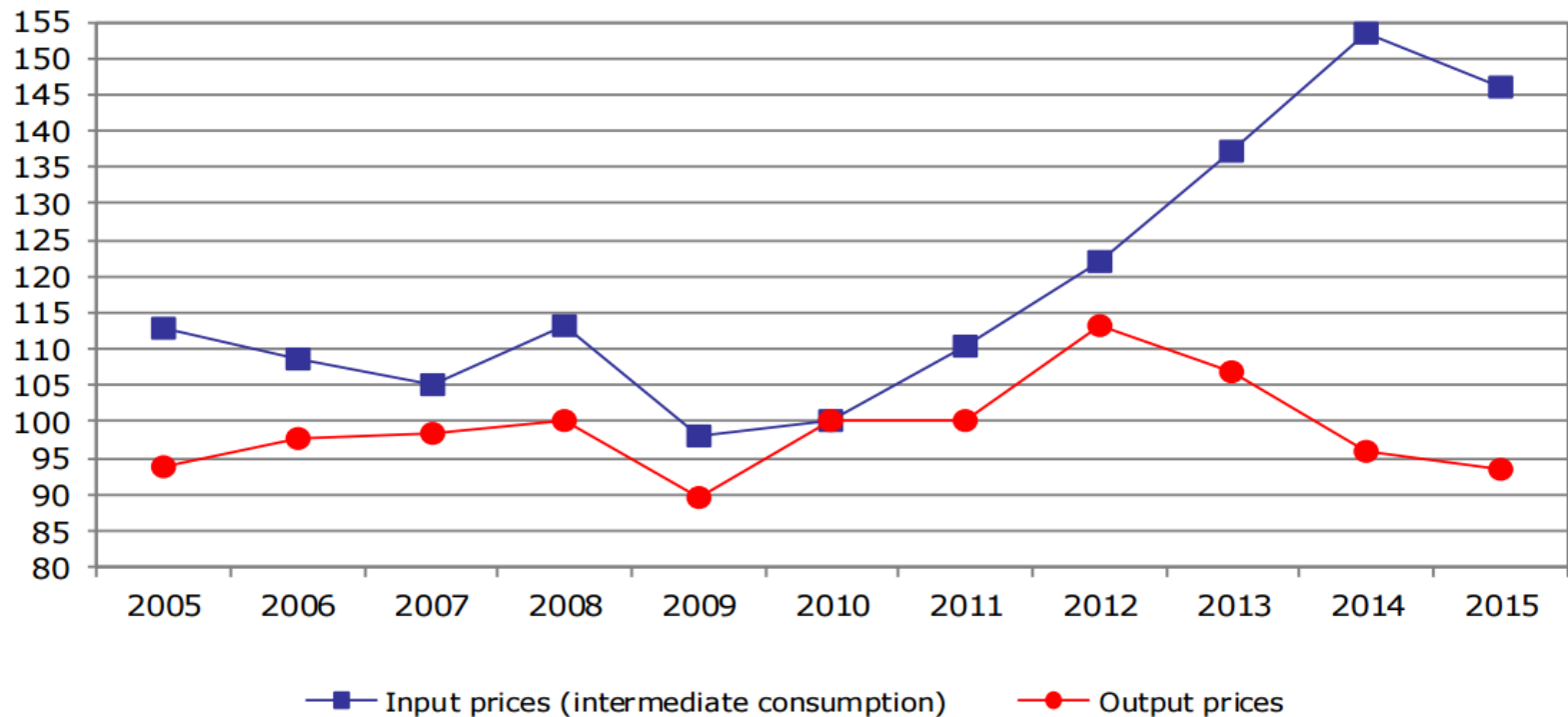


Evolution Belgian agricultural income compared to wages compared to wages in other sectors of the economy (2010 = 100 !)



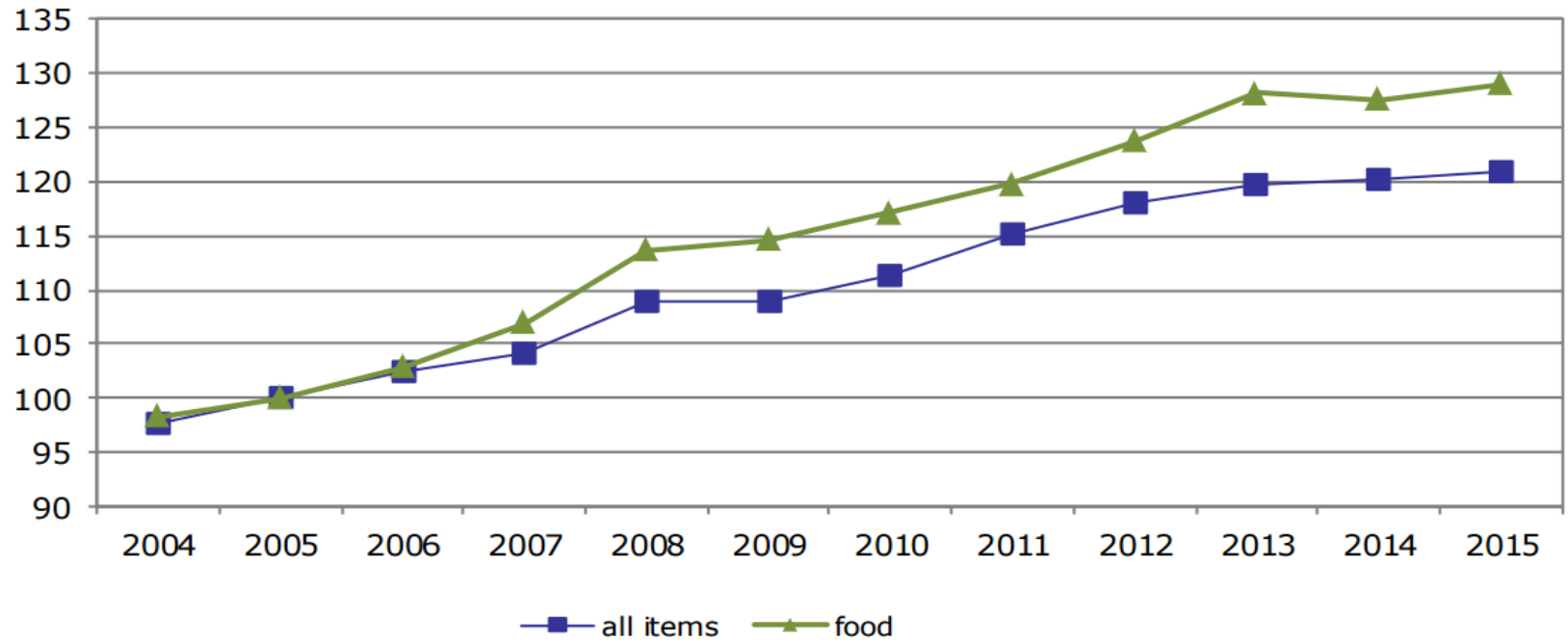
Source: Eurostat. Updated: January 2016.

Evolution of Belgian agricultural input and output prices



Source: Eurostat. Updated: March 2016.

Evolution of Belgian consumer price indices



Source: Eurostat. Updated: January 2016.



poor farmers



fair paid employees and businesses



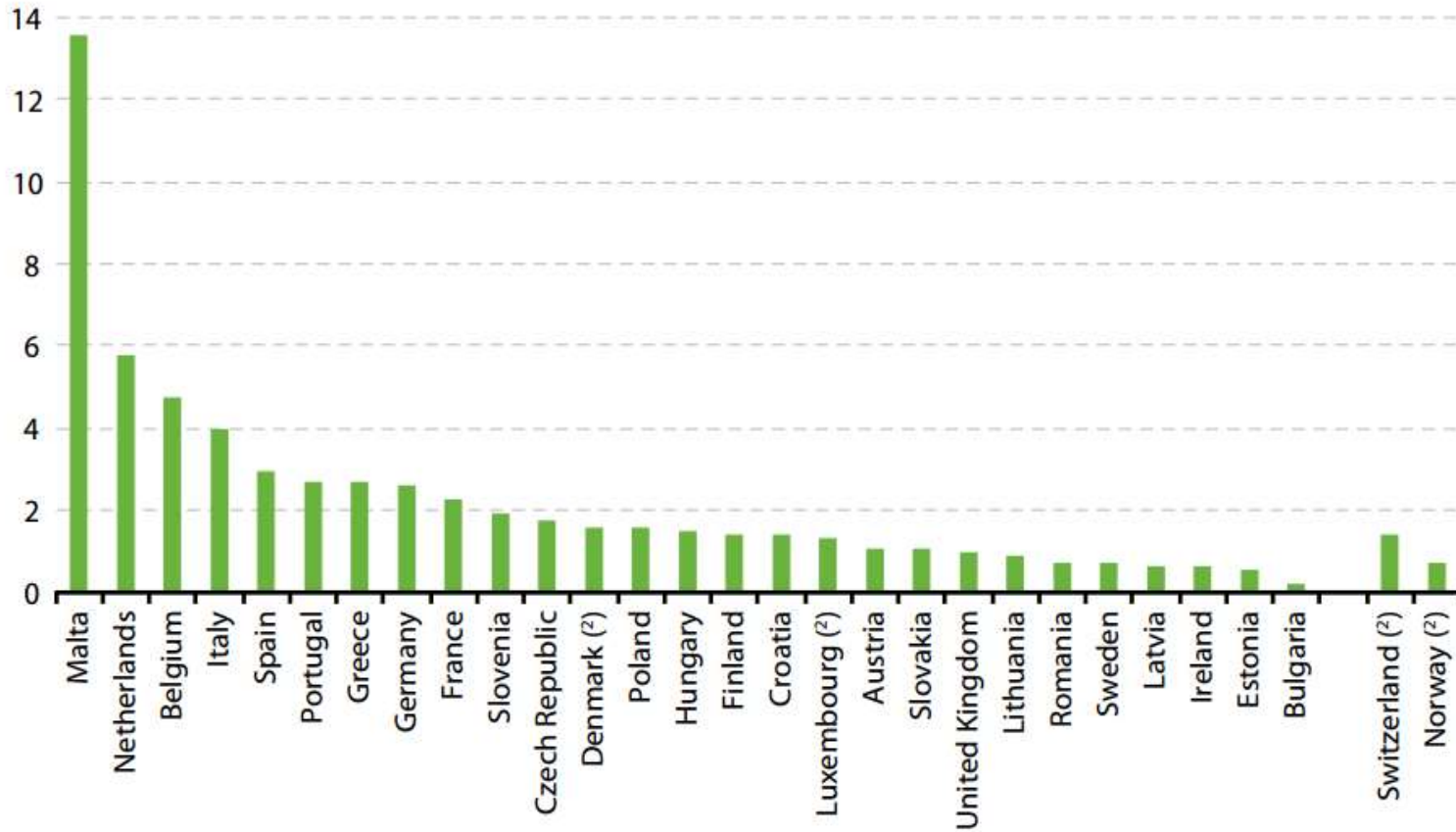
Illustration by Flemisch farmers union: of the cost of a meal



Agricultural activities result in environmental pressure through:

- ▶ emissions of acidifying and eutrophying substances (e.g. ammonia, nitrogen and phosphates),
- ▶ use of pesticides,
- ▶ emissions of other substances into the air and water (e.g. greenhouse gases, particulate matter),
- ▶ use of scarce space,
- ▶ use of water and energy,
- ▶ intensive use of soils
- ▶ ...

Figure 5.14: Pesticide sales by UAA ⁽¹⁾, 2013
(kilogram per hectare)



⁽¹⁾ Confidential data have been removed from the sums of pesticides sales.

⁽²⁾ Fungicide and bactericide sales for Luxembourg is from 2012; UAA data for Denmark from 2012 and Norway and Switzerland from 2008.

Note: Data for Cyprus not available.

Source: Eurostat (online data codes: [apro_cpp_luse](#) and [aei_fm_salpest09](#))

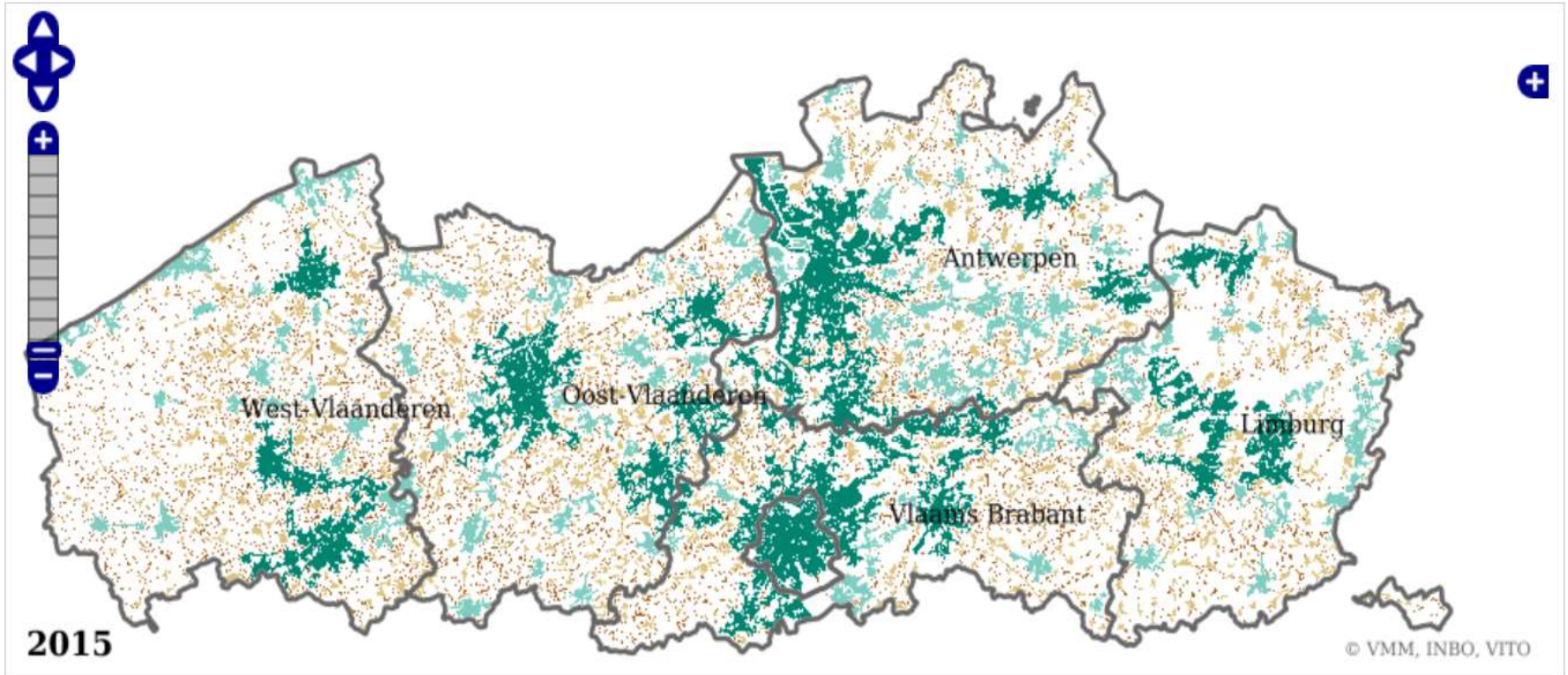
Use of scarce space

- ▶ Enormous competition for the scarce space:
 - between different users of space: agriculture, industry, nature, water, residential (house and garden) , road infrastructure, horsification,...
 - and within the agricultural sector
- ▶ Price of agricultural land increasing fast: now 3 - 8 euro /m²
- ▶ Preserve farmland for farmers... in progress...
 - Tenant farmers law
 - Spacial planning

Amount of stone clusters

Clustergrootte verstening

[▶ Animeer kaart](#)



Many problems! Many solutions!?

- ▶ Sustainability and innovation!?
- ▶ Themes and concepts:
 - Green care (social farming/farming for health)
 - Rural and agri-tourism
 - Farm and countryside education
 - Short food supply chains :regional products, farmers markets, alternative food networks, CSA
 - Home processing
 - Environmental services: nature and landscape management, biodiversity schemes, water management
 - Organic farming
 - Energy farming
 - Agro-ecology

