

Production is concentrated in specialised farms

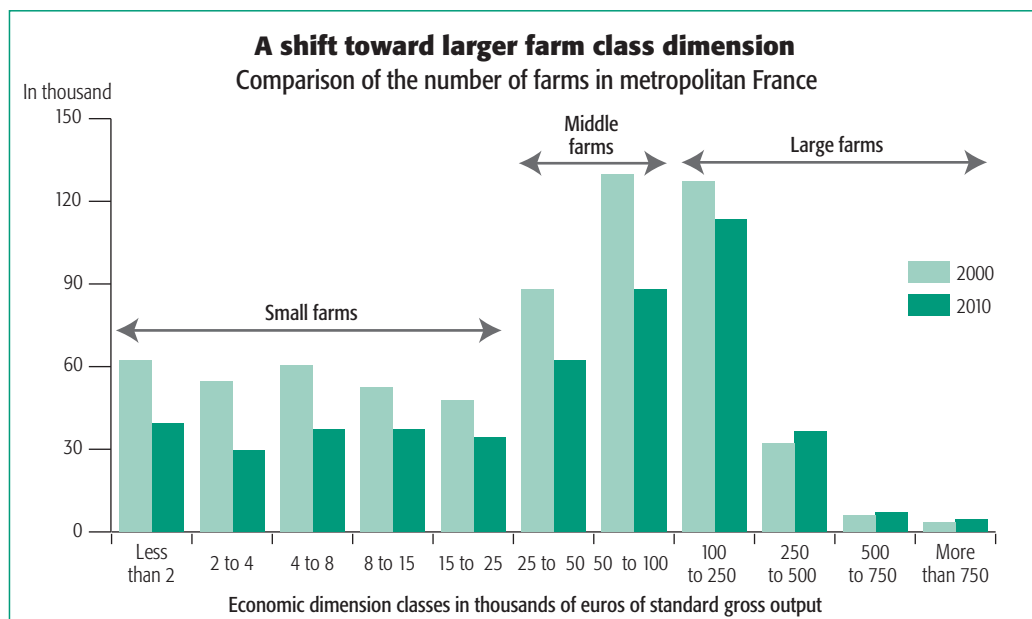
Over the last ten years, the economic performance of farms has improved. Over the same period, their enlargement and the tendency to specialise has slowed down compared to the ten years previous. However, specialisation is not concentrated in any one geographic area except for dairy and non-soil farming.

In spite of the decrease in the number of farms between 2000 and 2010, the overall volume of farm production, as measured in agricultural accounts, was maintained. On average per farm, it rose tentatively by 3.2% per year. More than 97% of potential production as measured by standard gross output (SGO) is concentrated in middle and large farms. In the latter, the average SGO (in other words the economic dimension of farms) increased by 1.7% per year which is less than the volume of

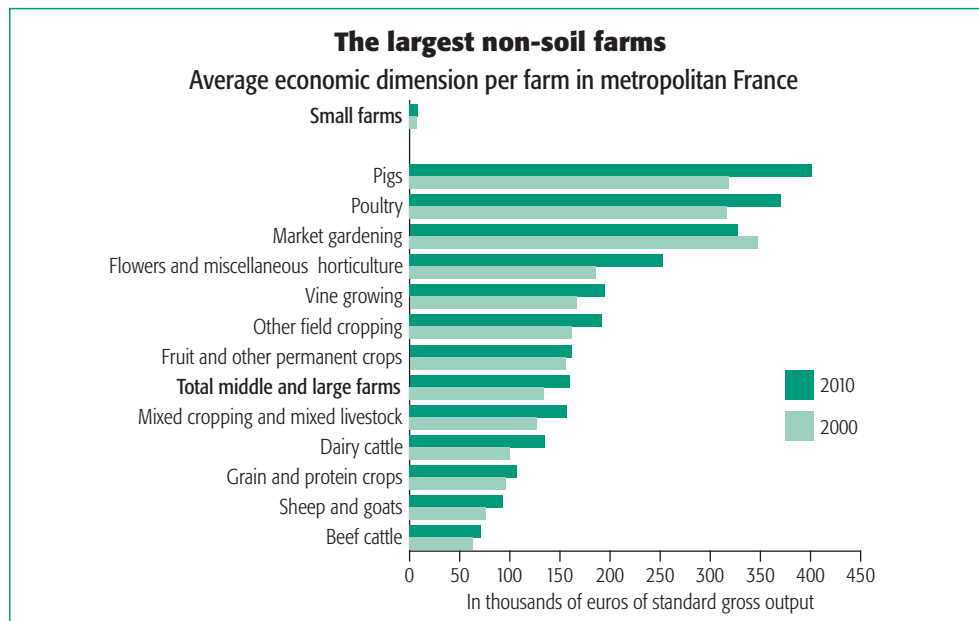
actual production per farm. This can be explained by better production performance combined with farm enlargement and a greater specialisation of farms overall.

Increase in the number of very large farms

The increase in the average economic dimension of farms can be explained by a shifting towards higher class size. Since 2000, the number of farms in all classes under 100,000 euros SGO has decreased by more than 3.5% per year. The rate of reduction has been less (-1.1%) for the large farm classes between 100,000 and 250,000 euros SGO. In contrast, the number of farms in the classes over 250,000 euros SGO is on the increase. Large farms (more than 100,000 euros of SGO) now account for more than 80% of potential production compared to 73% in 2000. The very large farms alone (more than 250,000 euros SGO) account for 45% of potential production (compared to 37% in 2000). The average economic dimension of small farms varied very little between 2000 and 2010. In middle and large farms, the increase in economic dimension concerns the overwhelming majority of specialised farms and is the highest (+3.6%)



Source: SSP - Agreste-Agricultural census



Source: SSP - Agreste-Agricultural census

Further reading...

■ "French agriculture over 50 years: small family farms with simple payment rights"
Maurice Desriers
Agreste Cahiers n° 2
July 2007

■ "A moderate geographic concentration of production since 1970"
Maurice Desriers, Lucien Bourgeois
Agreste Cahiers n° 2
July 2002

■ "Standard Gross Output and new classification of farms"
Agreste Web site
Agricultural census 2010
Methodology

Consult internet site of the SPP:
www.agreste.agriculture.gouv.fr

> per year) in specialised dairy farming. There is however one exception which is market gardening (-0.6% per year over ten years). Farm types that are the least linked to the soil such as specialised pig and poultry production, market gardening and flower growing have the biggest economic dimension. In contrast, the most extensive systems such as specialised sheep and beef production have the smallest dimension. On average, dairy production has a higher economic dimension than farms specialised in grain, oil-seed and protein crops (Gop). Nonetheless, this production potential is measured excluding aid and so cannot be equated to turnover. It does not take overheads into account and neither does it reflect farm revenue. Furthermore, those farms that have a stronger economic dimension are also those that use the most means of production, in particular labour: 4.6 annual work units (AWU) in market gardening, 2.2 in non-soil production and 1.2 on average in specialised grain and oil-seed production.

Production concentrated in middle and large farms

As production is concentrated more and more in middle and

large farms so they have a natural tendency to expand. All types of production are concerned. The most significant increase is in beef cattle and sheep production. Here, middle and large farms gain three points in suckler cow and mother ewe livestock. Almost all dairy cows, pigs and poultry are concentrated in middle and large farms, which was also the case in 2000. However, some small farms in certain regions still maintain a production which is not insignificant.

Mixed farms are less frequent

Specialisation can be measured through the proportion of farms and the proportion of non-classified associated structural data of specialised farm types. Farm type classification is made on the basis of a threshold of two thirds of the standard gross output of one or a group of productions. Non-specialised farms are qualified as mixed-crop or mixed-stock farming. The relative share of the latter out of the total number of farms lost 1.5 points between 2000 and 2010 declining from 14.1 to 12.6%. This shows a continuous, albeit moderate decline of a strong trend as, between 1988 and 2000, the part of non-specialised farms had already decreased by 2.7 points.

Production concentrated more in specialised farms

More concentrated production can also be seen in farms already specialised. There is a clear increase in farms specialised in all types of production except vegetables. The most concentrated production in specialised farms is vine growing (more than 90%). On the other hand, grain production is one of

97% of production potential concentrated in middle and large farms

Share of middle and large farms in the whole of metropolitan France (in %)

	2000	2010
Number of farms	58.2	63.7
Standard Gross Output	96.1	97.2
AA	91.7	93.1
Total labour in AWU	84.9	86.7
Grain area	94.9	96.2
Vine area	94.2	96.1
Market garden vegetable area	95.2	97.1
Orchard area	89.7	89.6
Dairy cows	99.0	99.5
Suckler cows	88.9	92.3
Mother ewes	84.1	87.2
Pigs	99.7	99.8
Poultry	98.9	99.6

Source: SSP - Agreste-Agricultural census

Most productions concentrated in already specialised farms

Percentage by area or stock (in % of total farms)

Area or stock	Type of farming	2000	2010
Grain	Grain and protein	39.0	43.8
Oilseed	Grain and protein	57.4	61.7
Protein crop	Grain and protein	45.3	52.4
Vegetable	Market Gardening	68.2	63.5
Vine	Grape growing	89.8	92.3
6 variety orchard 1	Fruit farming	81.1	81.8
Dairy cows	Dairy cattle	65.1	67.0
Suckler cows	Beef cattle	51.4	55.7
Mother ewes	Sheep and goat	70.1	72.5
Goats	Sheep and goat	65.4	75.8
Pigs	Pigs	70.0	75.6
Poultry	Poultry	79.5	81.2

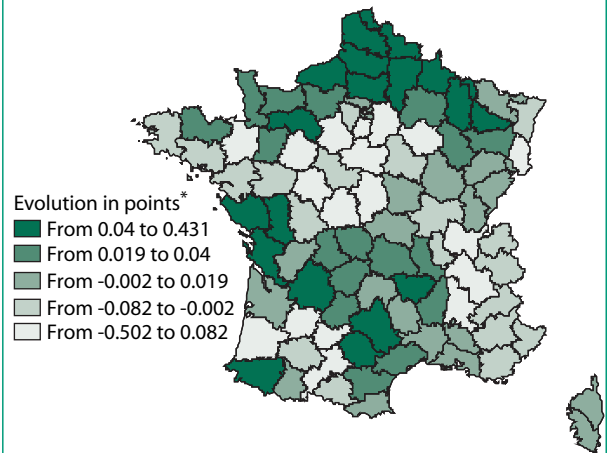
1. Apricot, cherry, peach, plum, pear, apple trees
39% of grain area belongs to specialised Gop farms in 2000.
In 2010, this area increased to 43.8%

Metropolitan France – Middle and large farms

Source: SSP - Agreste-Agricultural census

Number of farms specialised in grain and oil-seed crops

Evolution in national total between 2000 and 2010



*in the department of Eure, the number of specialised Gop farms make up 1.96% of the national total in 2000. It increases to 2.06% in 2010, the equivalent of an increase of 0.10 points.

Source: SSP - Agreste-Agricultural census

> the better distributed as the share of grain area of specialised Gop farms, while still increasing, remains under 50% (43.8%, which is +4.8 points compared to 2000). Where livestock is concerned, suckler cows stand out because of a lower concentration rate than other animals.

not found in grain production and even the share of the very specialised grain production departments (Eure-et-Loir, Loiret, Marne) is tending to break up. The increase in the number of specialised Gop farms is found essentially in the north of France, in Lorraine and in Poitou

Charentes which are regions that are less specialised in grain production than the large Parisian basin.

Maurice Desriers

SSP - Statistics Office
for Agricultural Output
and Accounts

Continuing geographical concentration of dairy and non-soil production

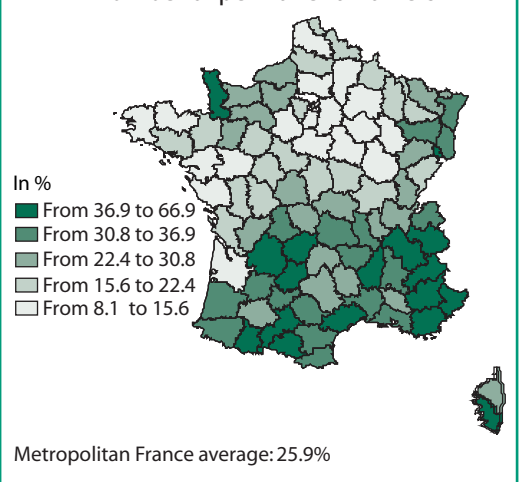
With the exception of dairy, pig and poultry production, the increase in farm specialisation is not on a parallel with an increase in geographical concentration. The share of the first ten producer departments in total dairy cows increased from 40.7% in 2000 to 42.4% in 2010. For pigs and poultry, the same indicator increased respectively from 69.7 to 72.1% and from 61.9% to 62.3%. Geographical concentration is to be found in Brittany essentially. The share of pig breeding in the four departments in Brittany increased from 55 to 56.8% over ten years. For dairy cows it increased from 18.7 to 19.8%. Geographical concentration is

Small Farms: Still numerous, of low economic importance but playing an important territorial role

■ In 2010, there were some 178,000 small farms (less than 25,000 euros SGO, see chart). Although they decreased yearly on average by 4.4%, they nevertheless still make up more than one third of the total farm count and more than one quarter of active farm workers. These people supply 13.4% of the volume of work measured in annual work units (AWU) which is just slightly lower than in 2000 (15.1%). Although the economic importance of these small farms is low (2.8% of total SGO), their social and human signification is considerable, even more so when the proportion of people concerned is especially high in mountainous and disadvantaged areas. Usually, these are farms where the head farmer has either two jobs or is retired and where small areas of land are farmed contributing to maintaining the diversity of the landscape.

Proportion of small farms in each department in 2010

Number of permanent workers



Source: SSP - Agreste-Agricultural census 2010

General features of farms								
	Number of farms		Gross standard production: average per farm		Agricultural Area		Number of AWU ¹ per farm (excluding ETA-agricultural service providers- and CUMA-farm machinery sharing cooperatives)	
	in thousands		in thousands of euros		in hectares		2000	2010
	2000	2010	2000	2010	2000	2010	2000	2010
Small farms	277.5	177.8	7.6	8.1	8.3	10.5	0.5	0.6
Middle and large farms	386.3	312.2	134.3	159.6	66.1	80.4	2.1	2.1
Grain and oil-seed	49.5	51.4	96.4	107.2	111.4	122.8	1.3	1.2
Cropping	24.4	19.5	161.9	191.9	98.1	115.1	2.2	2.1
Market gardening	5.2	4.4	347.9	327.2	11.0	14.3	4.7	4.7
Flowers and miscellaneous horticulture	9.0	6.7	185.8	253.1	7.8	10.2	4.6	4.6
Vine growing	55.4	46.9	166.5	195.2	20.8	22.5	2.5	2.6
Fruit and other permanent crops	10.5	8.0	155.5	161.5	26.4	30.4	4.0	3.9
Dairy cattle	70.7	48.2	100.5	135.2	61.7	81.5	1.9	1.9
Beef cattle	36.6	33.5	63.4	71.0	82.9	99.9	1.6	1.5
Mixed cattle	16.1	9.4	106.9	151.9	81.1	113.5	2.0	2.1
Sheep and goats	16.9	14.1	76.5	93.5	75.3	82.9	1.8	1.8
Other herbivorous animals	6.0	6.2	65.6	68.6	49.3	50.7	2.2	2.3
Mixed granivores	9.3	6.1	215.5	275.0	59.9	80.4	2.1	2.2
Pigs	7.6	6.0	318.4	401.6	43.6	50.8	2.2	2.2
Poultry	14.7	12.6	316.7	370.6	29.5	34.8	2.0	1.9
Mixed cropping and mixed livestock	54.4	39.2	127.0	156.9	82.6	103.6	2.0	2.0

1. Annual Work Unit
Metropolitan France – middle and large farms

Source: SSP - Agreste-Agricultural census

Standard Gross Output: a common denominator for all farm output

■ Output diversification and the development of production not linked to the soil put limits on the use of agricultural areas (AAU) when measuring the dimension of farms. In order to determine the economic dimension of farms, it is necessary to summon all actual output. This is possible by putting a coefficient onto every area or animal unit which represents the output potential per unit of each area of production. These are the standard gross output (SGO) coefficients. These coefficients have a deliberate structural character and are calculated on average over several years. The coefficients used for the first time in 2010 refer to the years from 2005 to 2009 (coefficients "2007" qualifies the central year of this average).

■ By summoning all potential output measured in this way, a total farm SGO is obtained which allows the said farm to be classified into:

A small farm if the SGO is inferior to 25,000 euros

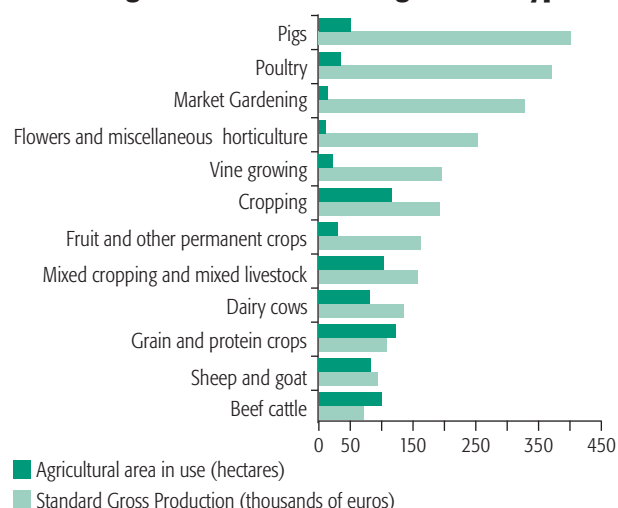
A middle sized farm if the SGO is between 25 and less than 100,000 euros

A large farm if the SGO is over 100,000 euros

■ The SGO's role is not to measure an economic outcome. It puts potential production before farm aid, calculated over an average of 5 years, on to a scale. Although expressed in euros, the SGO does not reflect farm turnover.

■ The SGO also allows farms to be classified according to their specialisation (Rica: farm types). A farm becomes specialised in an area if the SGO of the concerned output or outputs is more than two thirds of the total.

Average farm size according to farm type



Source: SSP - Agreste-Agricultural census 2010