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# Agriculture, Fishery, Food and Sustainable Rural Development in Greece

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- Economic developments in 2006 are characterised by strong real GDP growth, significant increases in investment and growth in exports of goods, and a reduction of the fiscal deficit, reaching levels below the threshold value of 3% of GDP. But if long-run fiscal sustainability is to be attained, wide-ranging reforms are needed.
- The farm profile can be described as that of many small farms with a few small plots in less favoured areas: 76% of farms are less than 5ha and only 1% is larger than 50ha; 71% of farms are situated in hilly and mountainous, or less favoured areas.
- The small size of farms, the high average age of the farmer and low educational attainment are important impediments to improving the sector's productivity.
- In 2006, the value of agricultural output in real terms declined, food prices rose slightly higher than the inflation rate and real agricultural income per person increased.
- The food processing sector has become more concentrated, while aquaculture is increasing rapidly.
- Implementation of the 2003 CAP reform in Greece took the form of full decoupling of support for all products except for seeds (where payments remain fully linked to production) and cotton (where payments are partially coupled to cotton production).
- Farmers will receive compensation for damages caused by the catastrophic forest fires occurred in summer 2007.

## I - Agriculture and the Greek economy

### 1. The national economy: development and perspectives

Greece has achieved spectacular growth over the past decade, which has significantly narrowed the gap in living standards with the rest of the European Union (EU). Its growth performance has been among the most rapid in the OECD area. In 2006, the economy grew briskly and is expected to continue to grow over the next two years. The revision of the national accounts approved by the European Commission in September 2007, will increase the level of real Gross Domestic Product (GDP) by almost 10% since 2000. Considerable progress has been made on fiscal consolidation and the government has also moved ahead in implementing structural reforms.

Public finances improved significantly in 2006. Yet, despite substantial fiscal consolidation, high growth performance has been sustained over 2006 and 2005, driven by a range of factors, including a strong rebound in investment activity and robust consumer spending. As shown in **Table 1**, the unemployment rate declined from 10% in 2004 to 8.4% in 2006, but remains high particularly among young first-time market entrants and those attempting to re-enter in the market (mainly women). Private consumption is estimated to be affected by high household indebtedness and rising interest rates and has slowed down to a just over 2% per year. Fixed investments grew in 2006 and are expected to remain at an average of

4.5% in following years. Although exports are expected to rise faster than imports (with an increasing diversity in export markets), the GDP growth expansion rate is estimated to decrease to below 4% over 2007 and 2008. Inflation pressures are likely to persist, eroding competitiveness. Furthermore, the current account deficit is expected to remain large.

**Table 1. Recent growth and prospects, 2003-2008**

	2003	2004	2005	2006	2007	2008
	Current prices, euro billion	Percentage changes, volume (2000 prices)				
Private consumption	135,8	4,6	3,7	3,5	3,3	3,3
Government consumption	29,5	2,5	-0,5	2	1,3	1
Gross fixed capital formation	47,9	5,8	0,2	14,6	6,3	5,7
Final domestic demand	213,2	4,6	2,4	5,8	3,8	3,6
Exports of goods and services	35,2	7,5	3,7	5	5,2	7,2
Imports of goods and services	54,2	5,6	-2,1	6,9	6,3	5,3
Net exports <sup>1</sup>	-19	-0,3	1,3	-1	-0,8	-0,2
GDP at market prices	196,6	4,7	3,7	4,2	3,9	3,8
GDP deflator		3,3	3,4	3,1	3,2	3,3
Consumer price index		3	3,5	3,3	2,8	3
Unemployment rate		10	9,4	8,4	8,1	7,9
Government net lending (%of GDP)		-6,2	-4,5	-2,3	-1,9	-2,2
Current account balance (% of GDP)		-5	-6,3	-9,7	-9,4	-8,9

Notes: 1. Contributions to GDP growth.

Source: OECD (2007), Economic Outlook 82, December.

Reversing the relentless rise in the deficit since the late 1990s has been the overriding objective of economic policy since 2004. A major achievement has been the reduction in the fiscal deficit since 2004 (the year that the Olympic Games were held in Athens) from over 7% of GDP to below the 3% limit (the limit established by the euro area's Stability and Growth Pact) in 2006.

However, sustaining robust growth over the longer term will necessitate effective implementation of further reforms. Continuing fiscal consolidation is the most pressing macro-economic policy challenge. The general government debt burden has fallen from a peak of 114% of GDP in 2001 to around 104% of GDP in 2006 (data before the GDP revision in September 2007), but still remains among the highest in the OECD area and is well above the 60% Maastricht reference value. Moreover, estimates of the prospective increase in fiscal costs from ageing are among the highest in the OECD area. Total public spending on old-age pensions as a share of GDP is currently among the highest in the OECD area, at around 12.5% of unrevised GDP. Pension expenditures are projected to increase to 2050 by more than in any other OECD country. The increase in pension expenditure as a share of GDP to 2050 is projected to be around 10% of GDP for Greece, but only around 3% of GDP for the EU15. A comprehensive reform of the pension system is not indispensable to ensure long-run fiscal sustainability, such reform is also needed to eliminate disincentives to work at older ages - incentives to retire early in Greece are among the highest in the OECD area.

Overall, pushing ahead with reforms and their effective implementation will require a deep restructuring of the public sector. The political economy of structural reforms, as reflected in the difficulty of the government to convince the public, which is often reluctant to embrace reforms, might prove to be a critical factor in the successful implementation of the reform agenda.

## 2. Agriculture and food in the national economy

Although the direct economic contribution of agriculture to the national economy has been constantly declining over time, it still plays a vital role for the Greek economy, accounting in 2006 for almost one-quarter of total exports; 12% of total employment and around 5.2% of GDP. As shown in **Table 2**, agriculture's direct contribution to the economy is much more important than in the European Union (EU) as a whole. In Greece agriculture also plays a key role in sustaining the socio-economic viability of rural areas: is the principal user of rural land (over 90%); contributes as much as 14% of rural GDP; and employees around a third of rural labour. Around 93% of agricultural holdings, 93% of agricultural land used and 90% of livestock are located in rural areas. In addition, the agricultural processing industry (production of food and drinks) is an important contributor to the Greek economy, and the larger processing sub-sector.

**Table 2. Agriculture's contribution to national economy**

	GDP <sup>(1)</sup>		Employment <sup>(1)</sup>		Exports of food, drink and tobacco	
	Greece	EU25	Greece	EU25	Greece	EU25
1995	9,9	2,8	20,4		23,3	
2000	7,3	2,3	17,0	5,7	19,6	5,6
2002	7,0	2,2	15,8	5,4	21,1	
2003	6,4	2,1	15,3	5,3	19,4	
2004	5,9	2,1	12,6	5,0	18,3	
2005	5,5	1,9	12,4	4,9	18,7	4,9
2006	5,2		12,0	n.a.	17,2	

Notes: 1. Agriculture, hunting, forestry and fisheries.

Sources: EUROSTAT - Agricultural labour input statistics; Economy and Finance ; National Accounts; External trade (aggregate data) ; *Extraction date*: 4 November 2007.

The catastrophic wildfires that occurred in the last half of August 2007, particularly in the Peloponnesian region, are estimated to have limited GDP by 0.6%. The five Peloponnesian Prefectures that were affected by the fires usually contribute by 4.5% to GDP and 11.7% to the country's agricultural population. Moreover, the impact on the local and national economy will be significant for some years to come. Over 228 000 hectares of forest, 41 000 hectares of cropland and 73 000 sheep and goats were burned. The olive oil industry and the livestock sector were the most severely affected. According to a report published by the World Wildlife Fund (WWF) Hellas, it is estimated at a little over 30 000 hectares of Protected Landscapes of Ecological Importance, which were designated for protection under the EU Natura 2000 Network, were destroyed. Apart from the loss of human lives (67 in total), the destruction of forestlands will have far-reaching effects in an overall rise of temperatures, floods, soil erosion and landslides.

According to the Eurostat Farm Structure Survey 2005, there are 833 700 agricultural holdings, of which 18.6% are considered to be subsistence farms (*i.e.* their economic size was less than 1 European Size Unit (ESU); 1 ESU being equal to 1 200 euros). Moreover, 71% of these farms are situated in less-favoured areas or mountainous areas. These holdings employed 677 000 workers and occupied about 3.9 million hectares of agricultural area (*i.e.* 30% of the total area of Greece). The average size of these farms is 4.8 hectares, about 4 times smaller than the EU-15 average. About 76% have an average size of less than 5 hectares and account for under 27% of agricultural land, while less than 1% (7 000 holdings) possess 50 hectares or more (representing 1% of agricultural area). It is interesting to note that, in contrast to all other OECD countries, over time the total number of holdings has remained stable or slightly increased, mainly due to a rise in the number of very small and large farms. The number of very small farms (less than 2 hectares) increased by 17% between 1995 and 2005 and the larger farms

(between 20 and 50 hectares) increased by 36%. Mid-size farms (between 2 and 20 hectares) decreased by 9%. Around 2% of the holdings were used for gainful activity other than agriculture, mainly contractual work (1.1%) and processing of food products (0.7%).

**Table 3. The structure of the Greek agricultural holdings, 1995, 2000 and 2005**

Farm size class (ha)	1995		2000		2005	
	Farms (1000s)	Average size (ha)	Farms (1000s)	Average size (ha)	Farms 1000s)	Average size (ha)
<2 ha	353	0,9	401	0,8	412	0,9
2-<5 ha	249	3,2	227	3,1	223	3,1
5-<20 ha	174	8,9	162	9,0	162	9,1
20-<50 ha	22	28,7	24	29,0	28	29,5
50-<100 ha	3	63,8	3	64,7	6	65,3
=>100 ha	1	187,7	1	177,0	1	183,9
Total	801	4,5	817	4,4	833	4,8

Source : EUROSTAT, Farm Structure Surveys.

Another structural difference in Greek agriculture compared to other EU countries concerns the occupational pattern of employed labour. While in the EU, on average, more than one-third of the labour force consists of paid employees (37%), in Greece paid employment in agriculture accounts for less than 10%. In 2005, among the 677 700 outright holders, 55% were aged 55 or more and 8% were younger than 35, 28% were women and, 18% had another gainful activity as their main occupation.

Agriculture is predominantly crop-oriented, accounting for more than two-thirds of the holdings. Fruits and vegetables, and olive oil are the most important crops. In terms of area, the olive sector accounts for 26% of the cultivated area and the fruit and vegetable sector accounts for 20% of the cultivated area (and more than one-third of the irrigated area). In 2005, 22% of agricultural holdings were mixed and 78% specialised (84% in 2003).

In terms of production, crop output accounts for 70% of the country's agricultural output in 2006 (**Annexe 1**). Over 57% of agricultural production in 2004-06 is comprised by five general categories of products, namely olive oil (15%), fresh vegetables (15.6%), cotton (8.1), fresh fruits (6.5%) and cereals (12.2%), while milk, and sheep goat meat account for 10% and 8.4%, respectively (**Annexe 2**). The above figures suggest that the structure of agricultural production is significantly different from the structure of the EU as a whole and from other Mediterranean countries.

Greece is the main cotton producer in the EU, accounting in 2005 for around 76% (about 1125 thousand tonnes) of the EU's total cotton production and 9.1% of Greece's total agricultural output. Cotton farms are characterised by small size (4.5 hectares), large numbers (79 700) and high regional concentration; the region of Thessaly is devoted almost exclusively to cotton production. Over 99% of cotton production is grown under irrigated conditions. Greece is the third-largest producer of olive oil in the world (after Spain and Italy), 80% of which is "extra virgin" olive oil. Olive oil exports represent slightly more than 10% of total food exports. The fruit and vegetable sector accounts for 7% of total exports (30% of agricultural exports).

Agricultural income, as measured by net value added at factor cost, declined in 2006 by 13.4%, mainly due to the decrease in the value of crop production (-11%) and intermediate consumption (-14.7%), particularly fertilisers (-10%) and pesticides (-11%). However, real agricultural income per person increased by 1.2% after remaining unchanged in 2005. The increase resulted primarily from a reduction in

agricultural labour input (-1.1%). Intermediate consumption eats up almost half of the agricultural output value.

Agriculture accounts for 87% of water use, and around 33% of agricultural area is irrigated. Soil erosion, water quality and water use are the key environmental issues related to agriculture. Many of the environmental problems facing agriculture stem from the abandonment of agricultural marginal and mountainous areas as well as from the intensification of farms in plain areas, which exacerbates water pollution problems and water use demand.

## II - Trends in agro-food production, consumption and trade

### 1. Crop and livestock production

#### A. Production

As shown in **Annexe 1**, the value of the output of agricultural goods in real prices has been variable since 2001 and declining in 2006. This is mainly due to the decline in the value of crop production, which fell by 11% in 2006. **Annexe 4** exhibits agricultural production of the main commodities in terms of volume, area harvested and yield. For cereals, area is estimated to have declined by 23% to reach 958 000 hectares in 2006. The main reason for this sharp decline is attributable to continuing implementation of the 2003 CAP reform -in particular, decoupling. Total cereal production is estimated to stand at 3.5 million tonnes for the 2006/07 market campaign, a decrease of 19% (about 837 000 tonnes) compared to 2005/06. The decrease in cereal production ranges from -28% for wheat to -21% for grain maize. As production fell by lower rates than area, average cereal yield increased. Average cereal yield was about 3.7 tonnes per hectare, 5% higher than in 2005. The highest increase was for wheat, whilst the maize yield remained stable. Rice production remained stable in 2006.

The introduction of the sugar reform in July 2006 had an important effect on sugar production in EU countries, including Greece, where beet area dropped by 37%. Olive oil production in 2006 (marketing year 2005/06) is estimated to have reached 411 983 tonnes, which constitutes a 6.5% decline as compared to the harvest of 2005. This decline is mainly due to unfavourable climatic conditions and, to a lesser extent to the elimination of the production aid scheme during the marketing year 2005/06. For fruits (excluding citrus) cultivated area has remained stable, where production and yield decline by 5.5%. For citrus the production was seriously affected by the adverse weather conditions in February 2004. For cotton, area planted increased by just over 5% in 2006, but average yields decreased by around 27%. The decline in yields is mainly due to adverse conditions prevailed during the year (primarily disease during maturation, and storms and flooding during harvest). The response of Greek producers to the reform of the cotton support system, at least in the short run, has been slow. This is partly due to the fact that returns to other crops (e.g. durum wheat) have fallen with the full decoupling of the cereal support regime. For the livestock sector, production is estimated to be lower in 2006 than in 2005 for all livestock, except beef, which increased by 5%. Milk production is estimated to have increased slightly in 2006.

#### B. Producer prices

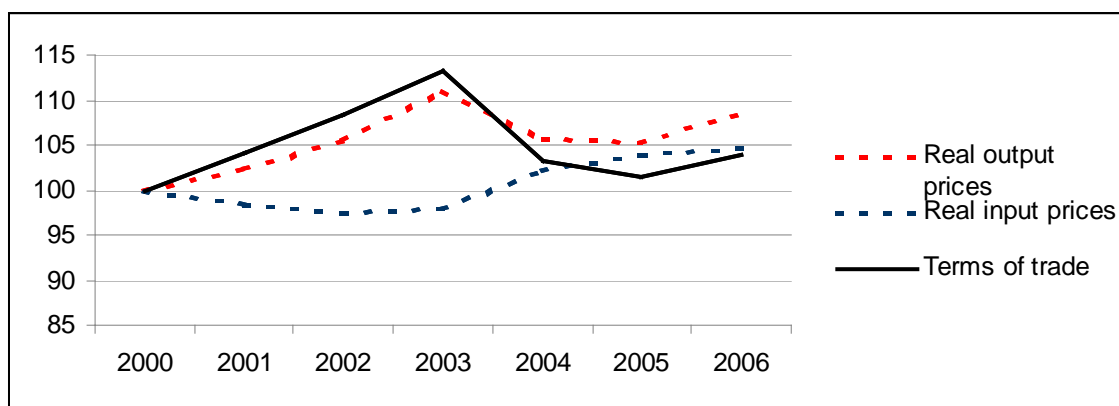
Following the slight decline in 2004, producer prices of agricultural production as a whole in real terms, excluding subsidies, increased in 2006 by 3% (**Annexe 6**). In nominal terms prices increased in both years (3.1% in 2005 and 6.6% in 2006). Although producer prices in real terms for all major commodity groups, except for dairy products, increased, the largest increases were observed for cereals (4.7%) and fruits (3.4%). Concerning livestock, the overall price index for animal products rose in 2006 (1.5%), but it

masked wide-ranging changes by sector; while milk prices declined (1.7%) and prices for animals increased (8.7% for pigs, 5.5% for cattle, 2.7% for sheep and goats).

### C. Input prices

In 2006, the purchase price index for standard consumption goods and services in agriculture rose at a lower rate than in the previous year, both in nominal and real terms (4% and 0.7%, respectively) (**Annexe 7**). In particular, prices were higher for energy (12.2% in nominal terms and 5.2% in real terms) and, to a lesser extent, for fertilisers (4.6% in nominal terms and 2.8% in real terms). The farmer's purchasing power, as measured by the terms of trade, exhibited a downward trend in 2003 and 2004, as input prices increased at a higher rate than output prices, but improved in 2006 by 2.5% (**Graph 1**).

**Graph 1. Evolution of agricultural real output and input prices, and terms of trade, 2000-2006**



Note: Nominal indices are deflated by the harmonised indices of consumer prices.  
 Terms of trade is the ratio of the index of real output prices and the real input prices index.  
 Source: Eurostat.

## III – Agro-food processing industries

The food processing sector is one of the most dynamic sectors of the Greek economy, with turnover in 2005 amounting to around 9.7 billion euros (*i.e.* 23% of the total value of the manufacturing sector). The industry employs 26% of the total Greek labour force in secondary production. The food processing sector comprises the following major sectors: fruits and vegetables, dairy products, beverages, snack foods, flour and bakery products, confectionery, meat and poultry products, fish and marine products and fats and oils. Greece is an import-dependent country, with EU countries supplying the majority of food products.

The emergence of BrandCo in late 2005 (renamed Vivartia as of September 2006) was a milestone in the sector. The five largest dairy and processed food and trading companies in Greece, namely Chipita International, Delta, Goody's, Geniki Trofimon and Barba Stathis, merged to create Vivartia, a colossus by Greek standards, being the 35<sup>th</sup> largest company in Europe and the 16<sup>th</sup> largest company and the 1<sup>st</sup> food industry in Greece. In addition to its Greek operations, Vivartia is active throughout the Balkans region, with extensive operations in Eastern Europe as well. The company also operates joint ventures in Mexico, Egypt, Portugal and Nigeria. Vivartia products are consumed by 90% of Greek households and are available in 94% of retail outlets. The company's turnover for the period October 2004 to September 2005 is estimated at 0.8 billion euros, while pre-tax profits are estimated at 147 million euros. For the first

half of 2007, consolidated sales increased by 15.6%, rising to 517.6 million euros, up from 447.6 million in the corresponding period in 2006. The company employs 20 000 people.

In December 2006, the Hellenic Competition Authority (HCA), the country's watchdog on competition, launched a two-year investigation on the dairy sector for 17 companies, including Vivartia, following allegations of price fixing. The issue attracted wide media coverage as prices charged for dairy products in Greece are believed to be among the highest in the EU, despite country's relatively low level of per capita income. The results were announced in December 2007 and seven dairy companies were fined a total of 48.3 million euros for price fixing and breaking competition regulations. In addition, four dairy firms and six supermarket chains were fined a total of 28.6 million euros for fixing retail prices. Companies can appeal the decision, but can only do so after paying 20% of the fine.

On 18 October 2007, the HCA noted that, Vivartia, by setting frozen vegetable retail prices and abusing its dominant position in the market, might have violated competition rules. The investigators' accusations were not binding and the case would be examined early 2008.

## IV – Food consumption

Household expenditures on food and drink have increased two and a half times since the mid-1970s, but the budget share decreased by almost half, as a consequence of rising incomes. Consumption patterns have changed significantly over time and there have been marked changes in the consumption of different food types. During the 1974-2004 period, per capita consumption declined significantly for eggs (-53%), bread (-37%), sugar (-36%), while it increased for yoghurt (92%), cheese (44%), meat (59%), and whole milk (40%).

According to the Household Budget Survey (HBS) 2004/05, expenditures for food and non-alcoholic beverages constitute the largest component of the total average monthly household purchases for goods and services, accounting for 17.1% (17.4% in the HBS 1998/99); alcoholic beverages and tobacco account for 3.99% (3.66% in the HBS 1998/99). Expenditures on meat is the fifth-largest expenditure category for goods and services spent by households (and the largest one for households with one person aged 65 and over) and, for dairy, the 10<sup>th</sup>-largest category. Rural households spend more on food and non-alcoholic beverages than urban households, 19.7% and 16.2% respectively.

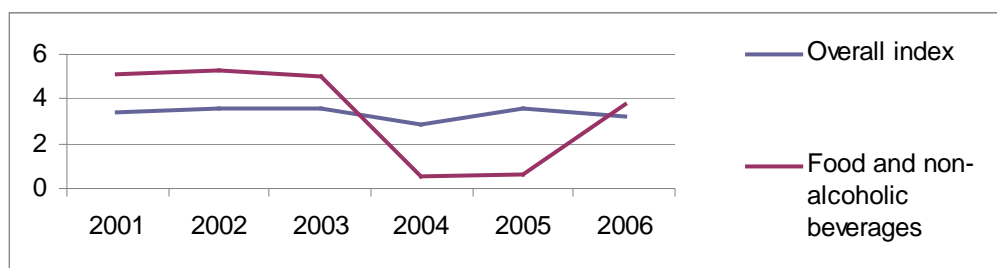
Comparison of the 2004/05 monthly purchases for food and non-alcoholic beverages with those of the 1998/99 indicates a decrease in vegetables (0.77%), meat (0.75%), fruits (0.55%), "coffee, tea, cocoa" (0.34%) and an increase in fish (0.56%), oils and fats (0.33%), "sugar, jam, honey, chocolate and confectionery" (0.45%), "mineral waters, soft drinks, fruit and vegetable juices" (0.45%). In terms of the monthly mean quantities, an increase is estimated for "milk, cheese and eggs", "oil and fats", and "mineral waters, soft drinks, fruit and vegetable juices".

Changes in food consumption may be due to changes in prices, incomes and food scares. As noted in the last two reports, the increase in food prices at historic high levels has become a matter of national concern. After the sharp increases in the early-2000s, food prices exhibited a decelerating rate of increase in 2004 and 2005, but increased slightly more rapidly than the overall consumer prices in 2006 (**Graph 2**). Among food items, the prices of fruits and vegetables have greatly increased in 2006 as compared to 2005, while the price of meat and dairy products has modestly increased. Per capita income in constant prices has also increased in 2006. Domestic consumption for poultry meat was affected by the outbreaks of avian flu in Turkey and Romania. Greece was also among the first European countries to detect H5N1 avian flu in wild swans in early 2006, although no cases were detected in domestic poultry. The efforts of the government to inform the public on avian flu have been received with diverse reactions among the public, with Greeks in rural areas have had a more instinctive reaction than those in the major



urban centres. Per capita consumption of fruit and vegetables in Greece is among the highest in the EU, and the rate of self-sufficiency is around 105%. In contrast, consumption of meat is, in general, well below the EU average and the self-sufficiency rate is extremely low (55% in total meat, 28% in beef, 40% in pigmeat). For crops, self-sufficiency rates range around 70-80%.

**Graph 2. Overall CPI and food price index – annual rates of change (%)**



Note: CPI = Consumer price index.

Source: National Statistical Service, 2007.

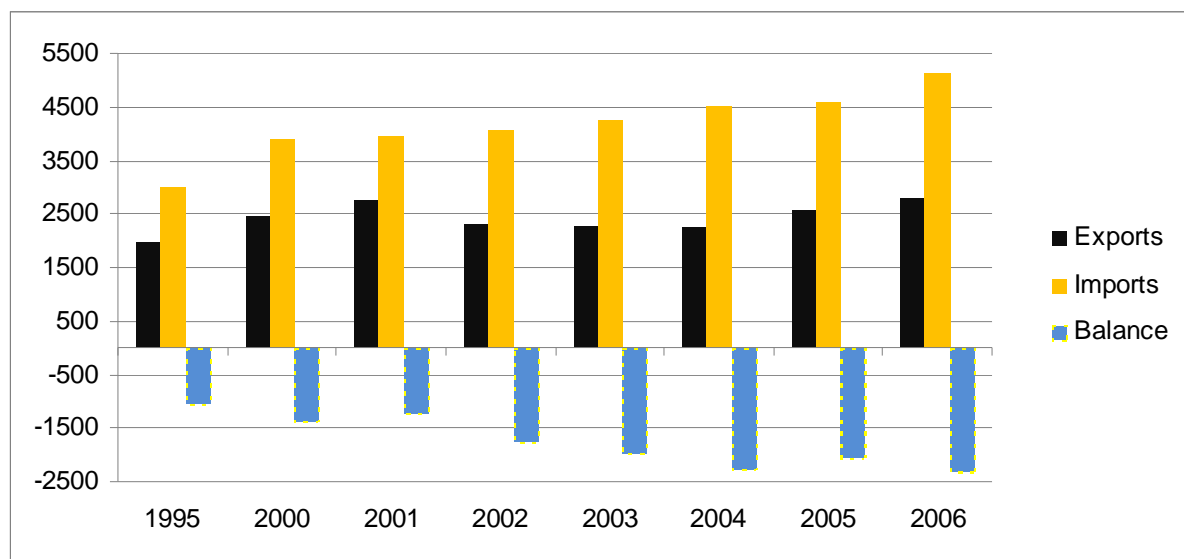
## V – International trade of agri-food production

Despite the fact that Greece has the highest share among EU member states of exports of food, drinks and tobacco in its total exports (18.7% in 2006), it is a net importer of these products (**Graph 3**). As shown, in **Annexe 11**, the trade deficit is mainly attributed to the large deficit in trade with its EU partners. Extra-EU imports, account for 30% of total imports. Around 30% of the extra-EU trade deficit stems from meat and dairy imports.

Agricultural exports, particularly of crop products, are steadily increasing, but imports of livestock products are increasing at a greater rate. Following an 11% decline in 2005, the trade deficit increased by 13% in 2006, which is equivalent to 2.3 billion euros. In 2006, the value of exports of food, drinks and tobacco reach 2.8 billion euros and the value of imports 5.1 billion euros. Almost 80% of the trade deficit is attributed to imports of meat, dairy and feedstuffs. In 2006, agricultural trade deficit increased by a lower rate than the overall trade deficit.

As shown in **Annexe 12**, in most cases, agricultural imports are larger than agricultural exports. Greece has positive trade balance for only fruit and vegetables, tobacco, cotton and olive oil. The largest trade deficit is the meat trade (more than one billion euros in 2006). More than 90% of meat imports originate from EU countries (mainly the Netherlands and France). In 2006, meat imports increased by 19% (i.e. 176 million euros), while exports decreased by 13% (i.e. 5 million euros), thereby resulting to a trade deficit of around 1.1 billion euros.

**Graph 3. Trade balance of agricultural products, 1995-2006, million euros**



Source: EUROSTAT, 2007.

Greece is a traditional exporter of fruit and vegetables, both fresh and processed. Fruit exports are much higher than vegetables, comprising mainly citrus, grapes, melons and peaches. Exports of fruit and vegetables, which account for over 40% of agricultural product exports, increased for a second consecutive year, reaching 1.2 billion euros in 2006. Cotton exports sharply increased in 2006, amounting to almost 6 billion euros. On the other hand, tobacco exports declined by 57 million euros. Olive oil exports, which represent just over 10% of food exports, increased by 26% in value terms to 427.7 million euros and by 16% in volume to 141 300 tonnes.

The government since 2005 has intensified its marketing and promotion efforts for Greek products (food and beverages) to oversee markets, including the launching of an international campaign called "KERASMA" – "Greek Mediterranean Gastronomy".

## VI – Fisheries

### 1. Infrastructure

Greece has the largest coastline in the EU with a total length that exceeds 16000km. 19-20% of the total area of the country corresponds to the islands. The islands are an important element to the country's development. Out of approximately 3500 islands 112 are inhabited and 13% of the country's total population lives in the islands. The geomorphology of most of the islands is mountainous. The country's biggest urban centres are situated next to the sea. Around 90% of the country's population lives across the coastline and in many of these areas in summer months the population increases by almost 10 times. Among the EU25 member states, Greece has the largest fishing fleet in terms of number of vessels. Nevertheless, Greek fishing vessels are of small tonnage and power classes, and only the 8<sup>th</sup>-largest in terms of total tonnage of its fishing vessels and 7<sup>th</sup> in terms of total power of the vessels. Almost 97% of fishing vessels have a tonnage of less than 25 tonnes, with no vessel over 1000 tonnes and 71% vessels have a power of less than 25KW (Table 4).

**Table 4. Number of Greek fishing vessels by tonnage and power classes, 2006**

<i>A. By tonnage class</i>										
Tonnage Classes (t)	n.a.	0-24.9	25-49.9	50-99.9	100-149.9	150-249.9	250-499.9	500-999.9	>1000	Total
Greece	-	17436	240	196	105	48	18	2	-	18045
EU-25	20	76480	3440	3030	1412	1359	851	201	211	87004
<i>B. By power class</i>										
(kW)	n.a.	1-24.9	25-74.9	75-149.9	150-349.9	350-499.9	500-1999.9	>2000	Total	
Greece	331	12809	3424	887	458	120	16	-	18045	
EU-25	6389	37709	19863	11048	8540	1695	1583	177	87004	

Source: Eurostat, DG FISH, 2007.

During the period 2000-04, where the programme for the replacement of the fishing vessels was completed, the total number of the fishing fleet decreased by 6.5%, the power (kW) by 11.4% and the capacity by 11%. The maximum decrease was noted in small ships. At the same time the average age of the fleet declined somewhat, but remains relatively high.

Aquaculture is an important part of the primary sector in Greece. After the mid-1980s intensive aquaculture emerged as one of the most dynamic sectors, and Greece holds the first position among EU member states in the production of fish species of intensive cultivation. Against the backdrop of the relative decrease of fishing stock and higher consumer demand for fish in the EU countries, spectacular aquaculture development has resulted not only in increasing the production of domestic fish (especially seabass and gilthead seabream), but also in creating socio-economic structures that involve, both directly and indirectly, thousands of employees, particularly in fisheries-dependent areas of the country. Aquaculture has in some regions been the only productive activity in isolated islands and rocky coastal regions, which are normally deprived of other investment opportunities.

In order to minimise the adverse environmental impacts of aquaculture, research is currently underway aiming to achieve more sustainable farming practices, improve the management and control of aquaculture units as an integrated part of an holistic approach to Greek coastal management. If successful, such development of the aquaculture sector will not only enhance efficiency, but will also lessen the conflicts with other interested parties (e.g. tourism, recreational facilities, residencies, etc.) which sometimes occur in specific coastal areas.

## 2. Production and value of fishery products

In 2004, the capture for fishery products was 91 137 tonnes with 88 000 tonnes fished in the Mediterranean region, representing 18% of the total captures for the EU25 in that region. The vast majority (89%) of these 88 000 tonnes was caught in the eastern Mediterranean region, where, of the EU countries, only Greece, Cyprus and France fished.

Concerning aquaculture, production has increased rapidly over the last few years. In 2004, total production was 42 times higher (102 500 tonnes) than that of 1986 (2 534 tonnes) and 1.2 times higher compared to that of 2000 (86 502 tonnes). The larger part of this production is seabass and Gilthead seabream and pelekypoda (mostly oysters) in the Thermaikos gulf in the Thessaloniki region.

The value of captures is increasing rapidly, from 275 million euros in 2003 compared to 315 million euros in 2005, primarily due to higher prices for fresh fish as the capture quantities remained relatively stable. Likewise, the market for aquaculture (and in seawaters only) has expanded rapidly, as the value of product from 276 million euros in 2000, rose to over 360 million euros in 2004.

From a financial point of view, the performance of the fisheries sector heavily depends on various unpredictable factors, including the capability to attain a sufficient catch, climatic conditions and market conditions, such as the price of petrol. Moreover, the difficulty in finding trained employees can hinder the viability of the enterprises in the sector.

### **3. Consumption and international trade for fishery products**

Consumption of processed products has shown an upward trend over the last few years. Per capita consumption reached 22.2 kg, which is 2.3 kg lower than the EU15 average. Consumption of frozen products has slightly increased, while, for fresh fish consumption has remained stable or slightly decreased. Market consumption research has shown that in Greece frozen fish is bought in winter and spring, and canned fish in autumn. Yet, consumption of fresh farmed seabass and gilthead seabream has been increasing due to their low prices.

Marketing of fish products is supported by a public network of 11 auction halls. Products from the collective fishery are mainly marketed wholesale through auction halls, while aquaculture products are marketed through private installations for packaging and distribution.

Greece has a trade deficit of fish products of approximately 75 000 tonnes. However, fresh products exhibit a surplus of 41 000 tonnes, due to high share in exports of aquaculture products (2004 data). The fresh fish sector constitutes only a small part of imports (13 672 tonnes compared to 112 062 tonnes of total imports for the sector), and the quantities of fresh fish imported are decreasing. The main export markets for Greece are the EU countries (over half of the production of fish and shellfish species is directed to the markets of Italy, Spain, the UK and Germany).

### **4. Evolution of fishery policies**

The EU Common Fisheries Policy regulates fleet management. Member states may apply for measures that adapt their fishing fleet capacity in order to achieve a stable balance between fishing capacity and fishing potential. Public aid for processing and marketing is granted only by means of EU regulation, through the 3<sup>rd</sup> Community Framework Support (CFS) 2000-06.

As part of this Framework, several measures (co-financed by the EU) have been implemented. The main policy objectives in the aquaculture sector entail: an increase in surplus of products with high nutritional value and quality at satisfactory prices; improvement of the hygienic conditions in production; rational fishing management of inland waters within the framework of sustainable development; an improvement in the trade balance through a reduction in fish imports and an increase in exports; differentiation in fishery production, by adopting new technologies in the commercial and administrative organisation of aquaculture companies; and increased financial viability through decreasing production costs.

As part of the 3<sup>rd</sup> CSF and as a result of the EU Fisheries Policy, since 2000 the shipping fleet has decreased, especially following the 2002 reform, under which the administration for the fisheries sector is oriented towards attaining sustainability between the fishing activities and the fishing stock. Also, an

attempt has been made to decrease the average age of the fleet. Furthermore, strong growth in aquaculture has been attained.

Until mid-June 2006, 155 million euros (28.7 million euros in 2005) of the Operational Programme for the Fisheries Sector (OPF) of the 2000-06 CSF were granted, corresponding to 45% absorption rate. By 5 August 2007, the rate of absorption of the OPF payments increased to 60.1% (payments can be disbursed until December 2008).

Public expenditure of the Operational Programme for the Fisheries Sector (OPF) of the 2000-06 CSF allocated until mid-June 2006 was 155 million euros (28.7 million euros in 2005), corresponding to 45% absorption rate, increasing to 60.1% by 5 August 2007 (payments can be disbursed until December 2008).

The Community Support Programme (CSP) 2007-2013 for fisheries for Greece was approved by the European Commission in the beginning of January 2008. Total public expenditure is 274.1 million euros, 207.8 of which (75.8%) will be financed by the EU – European Fisheries Fund. The main strategic policy targets include:

- Sustainable management of fisheries sector and improvement of its competitiveness
- The development of the aquaculture sector
- The sustainable development of selected fishing regions
- The contribution of inspections and control of fishing activities in the sustainable use of marine resources, and in the implementation of principles of “responsible” fishery and aquaculture
- The acceleration of the Programme for the collection of marine data in order to support the planning of fisheries policy and the best use and maintenance of fishing stocks

## VII – Agriculture and agri-food policies

### 1. Evolution of agricultural policies

The overall agricultural policy framework is determined by the EU's Common Agricultural Policy (CAP), and the agricultural sector is mainly supported through the CAP. On average, support to EU farmers declined from 41% of farm receipts in the mid-1980s to 34% in 2004-06 (as measured by the OECD Producer Support Estimate). Over time, there has been a consistent shift from traditional market price support and output-related measures towards sector-wide, non-commodity specific policies based on area. Market price support and output payments now account for less than half of support to producers (compared to over 90% in the mid-1980s).

Total budgetary support to Greek agriculture in 2006 was around 4.5 billion euros, of which 40% was financed by the national budget. Greece accounts for almost 6% of the EU25 total EAGGF-Guarantee expenditures, 75% for cotton, 39% for tobacco and 20% for olive oil (**Annexe 13**). Over than 80% of this support is accorded to plant products, 12% to animal products and around 5% to rural development. Direct payments to producers are distributed more equally in Greece than in the EU taken as a whole. While in the EU15 80% of beneficiaries received around 20% of the payments in 2005, in Greece 76% of beneficiaries received 24% of the payments.

The overriding policy development since 2004 was the implementation of the 2003 CAP reform. This was followed by a second package, decided in 2004, for the olive oil, cotton, tobacco and hop sectors; by the reform of the fruit and vegetables sector agreed in 2007; and by the reform made to the sugar sector,

which was agreed in 2006. The two core features of the radical 2003 CAP reform are: i) the introduction of a single payment (the Single Payment Scheme - SPS) which does not require recipients to produce any commodity (decoupling); and ii) linkage of the receipt of most budgetary payments to compliance with certain standards related to environment, food safety and animal welfare (cross compliance).

Within a given margin, the member states concerned could decide the level of decoupling to be implemented at national level. In Greece, implementation of the SPS started in January 2006. Farmers were allotted payment entitlements, established at the farm level, based on historical reference amounts received during the 2000-02 period (1999-2002 for olive oil). Greece opted for full decoupling of direct payments for the majority of products and for the mandatory retention of up to 10% of the SPS to encourage high quality production, improve marketing or protect the environment. The reforms concerning the three Mediterranean products (olives and olive oil, cotton and tobacco) in 2004 was of great importance to the Greek agricultural economy, as budgetary support for these three commodities accounts for almost two-thirds of the total budgetary support granted to Greek agriculture.

The 2003 CAP reform created some scepticism in Greece. Fears were expressed that decoupling could lead to land abandonment as cultivation of some traditional crops would cease, with adverse consequences for the rural environment in terms of biodiversity and employment. To address these fears, in 2006 13 studies were conducted, under the auspices of the Ministry of Rural Development and Food, covering the whole country (one per region). The aim of these studies is three-fold: to analyse the agricultural situation in each region; to assess the effects of the 2003 CAP reform; and to identify future solutions for restructuring production of plant products and improving husbandry to better respond to market signals.

A number of policies introduced in 2005-06 aimed at encouraging the production and domestic consumption of bio-energy. An update of the Greek Law 343/2005 forms the basis for the production of bio-fuels. The Greek government is aiming to produce 160 million litres of biodiesel and 400 million liters of bio-ethanol annually by 2010. There are five factories producing biodiesel in Greece (opened between December 2005 and December 2006). Up to 10-20% of the raw materials used (e.g. cottonseed oil, sunflower oil and used cooking oils) are of Greek origin. The aim is to intensify cultivation of sunflower and oilseed rape so that the percentage of oils of Greek origin used exceeds 50%. Concerning the production of bio-ethanol, the "Greek Sugar Industry SA" announced that two out of five of its production units will be transformed to produce bio-ethanol using sugar beets, maize and arable crops and the aim is to start the production by the end of 2008. Greece is considered to have important potential for the production of bio-fuels: biodiesel cotton is already cultivated broadly, while sunflower and oilseed rape have started to be cultivated more widely beginning of 2007. Concerning bio-ethanol sugar beet, maize and arable crops are already cultivated in many areas of the country, but this is not yet the case for sweet sorghum. Nevertheless, based on test field results, sweet sorghum has a higher yield of bio-ethanol than sugar beet and it can also be cultivated over the whole country, while sugar beet is cultivated only in the northern regions of Greece.

## **2. Price and direct payment policies**

After consultation with the competent authorities, the Greek government decided on full decoupling for all products except for seeds -where payments remains fully coupled to seed production- and partial decoupling for cotton. More specifically:

- Arable crops: 100% decoupling; 10% retention for quality improvements
- Beef: 100% decoupling; 10% retention for quality improvements
- Sheep and goats: 100% decoupling; 5% retention for quality improvements
- Seeds: 0% decoupling

- Olive oil: 100% decoupling; 4% retention for quality improvements and 2% retention for funding producer organisations
- Cotton: 65% decoupling; 35% coupled to production for a maximum area of 370 000hectares.
- Tobacco: 100% decoupling; 2% retention for quality improvements
- Sugar: 100% decoupling; 10% retention for quality improvements

For cotton, 65% of the payments will no longer be linked to production and 35% will remain linked to cotton production, in the form of area payments. The payments can be granted to a maximum area of 370 000 hectares. Both farming organisations (farmer groups and co-operatives), as well as individual farmers, are eligible to receive this support. The first 300 000 hectares are eligible for the coupled payment of EUR 594 per hectare, and the remaining 70 000 hectares for EUR 342.85 per hectare. To be eligible for coupled aid, cotton can only be grown on land authorised by the government, using approved varieties of seed, and the cotton must be harvested under normal growing conditions. If the eligible area planted with cotton exceeds the maximum area limit, the per-hectare payment will be reduced proportionately. In 2006 the area planted exceeded the threshold by 68 000 hectares.

The reforms of the fruit and vegetables sector agreed by EU agriculture ministers in mid-2007 aim to: encourage more growers to join Producer Organizations (POs); offer POs additional managerial tools for crisis management (50% of the support to be financed by the EU budget); integrate the fruit and vegetables sector into the SPS, and thus, subject it to cross-compliance requirements; generate a minimum level of spending on environmental measures; increase EU funding of organic production and promotion measures; and abolish export subsidies. The reforms will enter in force in 2008.

Overall, while producers of fruit and vegetables welcome full decoupling, the processors propose to either maintain the *status quo* or maintain a high percentage of coupled payments. Given that only 13% of Greek horticultural farmers are organized in agricultural co-operatives and farmer groups (compared to 80% in the Netherlands, for example), the reforms are expected to encourage them to join producer organizations. Furthermore, full decoupling and a possible subsequent decline in production of a number of fruit and vegetable crops may encourage diversification towards sheep and goats, as demand for their products (e.g. feta cheese and yogurt) is expected to be strong.

In April 2007, the European Commission adopted proposals for a wide-ranging reform of the wine sector. Its main elements are: abolition of market management measures (crisis distillation, export subsidies, private storage aid); grubbing-up support for growers wishing to leave the sector; all areas under vines will be eligible for the SPS and subject to cross-compliance requirements; the system of planting rights will be extended until 2013; and national measures to improve marketing and promotion, support for green harvest and insurance against natural disasters will be put in place.

The EU regulation introducing specific measures in favour of certain agricultural products from the smaller Aegean islands was adopted by the EU Council of Agriculture Ministers in May 2006. Under this decision, 24 million euros (but not exceeding 5.5 million a year) will be granted to support the production of traditional agricultural products, and the support of local production in food products and fodder. Some of the products concerned are: traditional olive groves, honey, vineyards used for the production of V.Q.P.R.D. wines, Chios mastic, Aegean citrus trees, Santorini fava beans and Santorini's small tomato.

The government has unveiled a 650 million euros plan to aid the rehabilitation of areas damaged by forest fires in summer 2007. This includes measures to replant burn areas and prevent erosion. The plan aims at restoring the natural habitat and help people in rural areas who incurred financial losses.

### 3. Structural policies – policies for rural development

The 3<sup>rd</sup> Community Support Framework (CSF) for Greece provides the overall framework for rural development policies. It comprises several national and regional operational programmes, which aim to achieve sustainable and integrated rural development. The most important of these are the National Operational Programme – Rural Development 2000-06, which is co-financed by EU EAGGF-Guidance section fund, and the EU Leader+ initiative. The Operational Programme for the Fisheries Sector (OPF) discussed earlier and the Rural Development Document (RDD) 2000-06 discussed in the following section are also part of the 3<sup>rd</sup> CSF.

The “National Operational Programme – Rural Development 2000-06”, which is the main rural development programme under the CSF, integrates measures at the local level and aims at creating viable and competitive development throughout the country. The main measures implemented are the following:

- Integrated measures at the level of rural farm holdings
- Measures to enhance processing and commercialisation of agricultural and forestry products by improving quality and adapting to market demand
- Action to encourage the installation of young farmers
- Actions to promote new markets
- Integrated actions for rural areas

The EU contribution was 119.84 million euros in 2004, 205.82 million euros in 2005 and 274.55 million euros in 2006. Until 5 August 2007, the total absorption rate of the programme was 63.2%. The closing day for the programme (financially) is the end of 2008. The total EU contribution is 2 037 million euros (following the revision of 2006).

The European Commission’s initiative “Leader+” was approved in November 2001. In July 2002, the programme was published, while the selection of 40 local action groups (LAGs) was finalised. Total public expenditure is 255.8 million euros. The initiative focuses on partnership and networks to develop locally based bottom-up approaches in order to lessen isolation of rural people in mountainous and less-favoured areas (LFAs). Specific actions include: the promotion of investments in rural tourism, the development of small to medium sized enterprises, the processing of agricultural products, the use of new technologies and the protection of the cultural and natural heritage. The financial implementation of the Programme will be completed by the end of 2008. The payments were 28.6 million euros in 2004 and 28.7 million euros in 2005. The absorption rate of the programme (until 5 August 2007) was 61.8%.

The Rural Development Programme 2007-2013 “Alexandros Baltatzis” was approved by European Commission in mid-November 2007, unlocking a total of 5078 million euros (73% of which to be financed by the EU) for the 2007-2013 period (**Table 5**). The overall objectives of the programme are:

- Improving the competitiveness of the in the agricultural and agri-food sector (Axis 1)
- Sustainable use of natural resources and landscape conservation (Axis 2)
- Improving the quality of life of the rural population and encouraging diversification of the rural economy (Axis 3)



**Table 5. Total budget and share of EU funding**

Axis	Total Public Expenditure (million €)	Share of EAFRD* in public expenditure (%)	EAFRD contribution (million €)
Axis	2 254.9	70.87	1 598.2
Axis	1 714.9	75.60	1 296.5
Axis	709.9	71.96	510.8
LEADER	295.2	76.06	224.6
Technical Assistance	103	75	77.2
<b>Total</b>	<b>5 077.9</b>	<b>73.01</b>	<b>3 707.3</b>

\*EAFRD = European Agricultural Fund for Rural Development

Source: European Commission, 21.11.2007

#### 4. Agriculture and environment

The Rural Development Document (RDD) 2000-06 is also part of the rural development programmes, but it is financed by the EU EAGGF-Guarantee section fund. It aims to strengthen the competitiveness of agriculture, while at the same time safeguarding the environment and promoting the sustainable development of rural areas. Initially, the RDD had four axes, covering early retirement, compensation allowances for mountainous areas and LFAs, agri-environmental measures and afforestation. Two more axes were added, one for compliance to standards and another for food quality, under the 2005 revision. RDD total public expenditure is 2402.3 million euros, out of which 1030.4 million euro (43%) are financed by the EU. In more detail, the six axes include:

- a) Early retirement schemes to encourage young farmers to take over holdings and combat rural depopulation. They also encourage the formation of large holdings.
- b) Compensation allowances are granted to farmers to compensate for the difficulties of farming in areas with natural disadvantages, to help maintain the level of population in these areas and to promote sustainable development.
- c) Afforestation of agricultural land consists of aid for meeting the relevant costs and also allowances to offset the loss of income.
- d) Compliance with standards to enhance farmers to comply with demanding quality standards in the area of environment, public health, and animal welfare (added in 2004).
- e) Food quality to support the production methods, which aim at the improvement of the agricultural products (added in 2004, but not yet in force).
- f) The agri-environmental measures comprise a whole set of measures, and involve promoting environmentally friendly farming methods, improving the upkeep of the countryside and preserving biodiversity through a range of measures which provide additional income for farmers.

The absorption rate of RDD is very high (99.82%), mainly due to the compensation allowances for the LFAs scheme (based on data of 5 August 2007). The final day for disbursing the payments is 31 December 2008.

In 2007-2013, the actions of the RDD are included in Axes 1 and 2 of the RDP 2007-13 "Alexandros Baltatzis".

Axis 3 of the RDD includes the agri-environmental measures. Most of these were included from the beginning of the programme in late 2000, but some have been proposed by the Greek authorities at a later stage. Moreover, some apply to whole country while others are regional or even local programmes. The most important of them from an economic point of view are organic agriculture and livestock

breeding, and reduction of nitrogen pollution of agricultural origin. More than 50% of agri-environmental expenditure is allocated to organic farming, 40% to the reduction of agricultural pollution of agricultural origin and only 10% for the remaining measures.

Organic farming has dramatically increased since 2004 (one of the highest rates of increasers among EU25 countries). Increased consumer awareness of food safety issues and environmental concerns, government support, including the reform of national regulations to reduce bureaucracy, have contributed to the growth in organic farming over the last few years. Promotion of organic farming has been a key policy objective of the Ministry of Rural Development and Food, and a target was set in 2004 to increase the share of agricultural area under organic farming to 3% in 2008 (it was less than 1% in 2004). The target was met already ahead of schedule, at the end of 2006. Between 2004 and 2006, the number of contracts signed under the organic agriculture support scheme increased by 151% (from 3 916 to 9 835) and the area covered by 158% (from 30 010 hectares to 77 317 hectares). For organic livestock, the total number of contracts between the 2001-04 period was only 957; 1 344 new contracts were signed in 2005 and another 906 in 2006. The difficulty to ensure the availability of sufficient grassland for pigs, together with inadequate infrastructure for the slaughtering and processing of organic meat may be the main reasons for the decreased participation in the scheme in 2006 as compared to 2005. Overall, if we look at the figures for organic farming in total (not all organic farmers participate in the agri-environmental scheme) the increase is also clear: in 2002, 29 505 hectares were cultivated organically (77 120 hectares including grassland), while in 2006, these figures were 170 186 hectares and 302 256 hectares, respectively. As displayed in **Table 6**, the increase is equally impressive for organic livestock breeding.

**Table 6. Number of organic livestock, 2002 and 2006**

	2002	2006
Cattle	7760	22292
Sheep	56374	259275
Goats	66472	305222
Pigs	1288	110096
Poultry	46553	133852
Equidae	4	
Bees (number of bee-hives)	2221	8426

Source: Ministry of Rural Development and Food.

Under the EU Nitrate Directive (91/676/EEC), seven nitrate-vulnerable zones have been designated and farms are required to undertake obligatory actions to reduce farm nitrogen run-off in these areas. The inclusion of new areas, after the revision of the programme in 2003, has led to an increased participation in the programme. Around 79 600 hectares were approved in 2005 and another 32 600 hectares joined (with 3 550 contracts) in 2006. It should be mentioned that the initial target in 2000 was for 93 000 hectares to enter the programme.

Greece has 85 products registered as Protected Designation of Origin (PDOs) or Protected Geographical Indication (PGIs), as shown in **Table 7**. The main PDO and PGI products in the country are table olives, olive oil, and cheese, with feta cheese being the most well known. Following the decision of the European Court of Justice in October 2005, feta is registered as a PDO and the name cannot be considered as “generic”. Thus, the name now enjoys EU-wide protection and is reserved exclusively for cheese originating in Greece. The transitory period of five years set out by EU Regulation 1829/2002 for producers (operating in areas outside the zone of protection designated for feta production) to comply with the EU Regulation and stop using the name “feta” for their products, expired on 15 October 2007. In

November 2007, the Greek Minister of Rural Development and Food announced that the year 2008 will be dedicated to FETA, involving various events at home and abroad to promote marketing of the product.

**Table 7. PDO and PGI product categories**

Category	PDO	PGI	Total
Olive oil	15	11	26
Table olives	9	1	10
Cheese	20		20
Fruit vegetables Dried vuts	12	10	22
Bakery products		1	1
Fish products	1		1
Honey	1		1
Mastic products	3		3
Others	1		1
Total	62	23	85

*Source: Ministry of Rural Development and Food.*

Concerning traditional alcoholic drinks, ouzo, tsipouro and tsikoudia have been registered as PGI in the EU catalogue liqueurs as of October 2006.

Greece is against the cultivation and import of genetically modified crops. The Government's position is that the existing scientific knowledge concerning the impacts of GMOs on biodiversity, the gene flow to wild and cultivated species, and on public health and the environment, in general, is limited and insufficient.

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## Annexes

### Annexe 1. Agricultural economic account - Global results

	1995	2006
<b>I. Agriculture and livestock</b>		
<b>A. Agricultural goods output</b>		
Value at basic price	10520	9595
Subsidies on products	1598	1281
Taxes on products	24	n.a.
Value at producer price	8926	8317
<i>Crop output</i>		
Value at basic price	7793	6909
Subsidies on products	1395	1072
Taxes on products	7	n.a.
Value at producer price	6398	5829
<i>Animal output</i>		
Value at basic price	2746	2667
Subsidies on products	201	195
Taxes on products	n.a.	n.a.
Value at producer price	2546	2469
<b>B. Agricultural services output at basic prices</b>	396	229
<b>C = A+B. Agricultural output</b>		
Value at basic price	10916	9824
Subsidies on products	1598	1281
Taxes on products	24	n.a.
Value at producer price	9322	8544
<b>D. Non-agricultural secondary activities (inseparable) at basic prices</b>	419	411
Subsidies on products	419	411
<b>E= C+ D. Output of the agricultural "industry"</b>		
Value at basic price	11335	10235
Subsidies on products	1598	1281
Taxes on products	24	n.a.
Value at producer price	9740	8952
<b>F. Total intermediate consumption at basic prices</b>	3484	3236
<b>G=E-F. Gross value added at basic prices</b>	7849	6968
<b>H. Fixed capital consumption at basic prices</b>	587	1080
<b>I= G-H.Net value added at basic prices</b>	7262	5889
<b>II. Forestry</b>		
<b>A. Forestry output at basic prices</b>	123	
Coniferous timber for industrial uses	39	
Firewood	84	
<b>B. Total intermediate consumption at basic prices</b>	14	
<b>C=A-B. Gross value added at basic prices</b>	120	
<b>D. Fixed capital consumption at basic prices</b>	0,4	
<b>E= C-D.Net value added at basic prices</b>	120	

Source: EUROSTAT, Economic Accounts for Agriculture and Forestry. Extraction date: 4 November 2007.

## Annexe 2. Agricultural economic accounts, by activity

(current basic prices, million euros)

	2004	2005	2006
<b>Cereals (including seeds)</b>	2004	1175	664
Rice	62	56	41
<b>Industrial crops</b>	1650	1649	582
Sugar beet	101	113	40
Fresh vegetables	1598	1560	1755
Potatoes (including seeds)	210	247	324
Fresh fruit	642	671	722
Citrus fruits	295	271	252
Grapes	392	406	398
Table olives	170	174	n.a.
Wine	52	53	52
Olive oil	1514	1749	1451
Raw tobacco	524	499	34
Other industrial crops	1011	1022	496
<b>Animal output</b>	2884	2911	2786
Cattle	304	280	255
Pigs	216	218	243
Sheep and goats	897	942	800
Poultry	158	151	145
Animal products	1265	1278	1302
Milk	1054	1049	1079
Other animal products	78	101	102
<b>Intermediate consumption</b>	3830	3934	3900
Seeds and planting stock	265	296	287
Energy	751	868	860
Fertilisers and soil improvers	242	237	203
Plant protection products, herbicides, insecticides and pesticides	237	219	196
Veterinary expenses	84	80	79
Feedingstuffs	1413	1372	1378
Maintenance	79	85	90
Agricultural services	447	469	476
Other goods and services	272	263	281
<b>Gross value added at basic prices</b>	8095	8423	6715
<b>Net value added at basic prices</b>	7029	7285	5554
Compensation of employees	1105	1343	1448
Other taxes on production	103	134	143
Other subsidies on production	398	414	2435
<b>Factor income</b>	7325	7565	7847

Note: Basic price is defined as the price received by the producer, after deduction of all taxes on products but including all subsidies on products.

Source: EUROSTAT - Economic Accounts for Agriculture and Forestry. Extraction date: 4 November 2007.

**Annexe 3. Number of farms by size and acreage, 2005**

Farm size class (ha)	number thousand	% of total	% cumulated	acreage 1000 ha	% of total	% cumulated
<2 ha	412	49.5	49.5	351	8.8	8.8
2 -< 5 ha	223	26.8	76.3	700	17.6	26.4
5 -< 20 ha	163	19.6	95.8	1468	36.8	63.2
20 -< 50 ha	28	3.4	99.2	831	20.9	84.1
50 -< 1000 ha	6	0.7	99.9	361	9.1	93.2
=>100 ha	1	0.1	100.0	272	6.8	100.0
Total	833	100.0		3984	100.0	

Source : EUROSTAT, Farm Structure Surveys 2005.



#### Annexe 4. Evolution of main productions, 1995-2006

	Area (1000 ha)		Harvested production (1000 t)		Yield (1000 t/ha)	
	1995	2006	1995	2006	1995	2006
Cereals (including rice)	1235	958	4420	3574	3.6	3.7
Wheat	857	610	2139	1380	2.5	2.3
Common winter wheat	252	85	717	251	2.8	3.0
Durum wheat	605	525	1422	1129	2.4	2.2
Rye	17	13	37	23	2.2	1.8
Barley	133	75	384	188	2.9	2.5
Oats	42	45	85	90	2.0	2.0
Grain maize	160	190	1566	1710	9.8	9.0
Rice	26	23	207	181	8.1	7.9
Root crops	94	52	2562	2455	27.3	46.9
Potatoes	52	25	n.a.	855	n.a.	33.8
Sugar beet	42	27	2562	1600	60.4	59.3
Sunflower seed	22	10	31	12	1.4	1.2
Cotton seed	444	382	731	459	1.6	1.2
Tobacco raw (including seedlings enclosures)	64	33	120	25	1.9	0.8
Vegetables - Total	133	115	4116	3623	31.0	31.5
Leafy or stalked vegetables (excluding brassicas)	21	20	268	254	12.8	12.7
Lettuce	3	4	66	68	19.3	17.0
Endive	2	3	41	35	17.8	14.0
Spinach	3	4	45	51	14.0	13.5
Asparagus	7	5	27	18	3.8	3.9
Globe artichokes	2	2	25	24	11.3	10.0
Vegetables cultivated for fruit	77	63	3236	2769	42.0	43.7
Tomatoes	38	29	1977	1550	51.5	53.4
Cucumbers	2	2	180	168	85.5	80.0
Melons	7	6	152	138	20.8	22.2
Water melons	16	14	623	620	38.4	44.6
Egg-plant	3	3	96	72	31.8	26.5
Marrows, courgettes	4	4	94	92	21.8	23.0
Red pepper, capsicum	4	4	102	118	24.8	29.6
Root and tuber vegetables	14	12	268	270	19.3	22.5
Carrots	1	1	38	37	31.3	33.5
Garlic	2	1	13	13	6.7	9.1
Onions	10	8	192	199	19.8	23.7
Pulses	10	9	90	85	9.2	9.4
Fresh fruit	1069	217	1956	2914	1.8	13.4
Fruit trees (excluding olives and citrus fruit)	141	118	1387	1314	9.8	11.1
Apples	15	11	331	263	22.6	24.6
Pears	4	4	60	55	13.9	14.2
Stone fruit	68	53	856	796	12.7	14.9
Peaches	49	32	661	618	13.6	19.6
Apricots	5	5	50	60	10.6	11.3
Cherries	9	10	43	31	5.0	3.0
Nuts	47	38	91	81	1.9	2.1
Almonds	25	12	51	41	2.1	3.6
Chestnuts	8	10	12	12	1.6	1.3
Other fruit	8	12	50	120	6.1	10.0
Oranges	39	38	823	880	20.9	23.0
Mandarins	3	3	29	13	10.3	4.8
Lemons	12	6	142	37	11.7	5.8
Vineyards	136	113	1145	1143	8.4	10.1

#### Annexe 4 (contd.)

	Area (1000 ha)		Harvested production (1000 t)		Yield (1000 t/ha)	
	1995	2006	1995	2006	1995	2006
Raisins (in fresh weight)	48	35	366	456	7.7	13.2
Table grapes (for table use)	16	12	248	140	15.8	12.0
Wine grapes (juice and/or wine making)	73	67	531	547	7.3	8.2
Total olives	729	807	1684	1965	2.3	2.4
Table olives	127	94	100	115	0.8	1.2
Citrus fruit	58	52	1048	1003	18.0	19.3
Olives for oil	602	713	1584	1850	2.6	2.6

n.a. = not available.

Source: EUROSTAT - Economic Accounts for Agriculture and Forestry. Extraction date: 4 November 2007.

#### Annexe 5. Evolution of animal productions

	slaughters (1000)			
	1995	2000	2005	2006
<b>meat</b>				<i>estimation</i>
beef	315	290	276	283
sheep	7712	7359	7057	6964
goat	4819	4458	4145	4036
pork	2268	2222	2105	1990
poultry	n.a.	94260	107174	100645

	production (1000 T)			
	1995	2000	2005	2006
<b>milk</b>				<i>estimation</i>
cow milk	764	789	n.a.	764
sheep milk	639	667	n.a.	663
goat milk	432	439	n.a.	427
eggs	120	122	123	n.a.

	cattle (1000 heads)			
	1995	2000	2005	2006
<b>cattle</b>				<i>estimation</i>
cattle	550	568	665	683
sheeps	9606	9269	8745	8975
goats	5847	5180	4926	4929
pigs	917	936	952	1033
laying hens	15742	14805	13823	n.a.

	meat production (1000 T)			
	1995	2000	2005	2006
<b>meat</b>				<i>estimation</i>
beef	70	63	58	61
sheep	80	81	78	75
goat	48	44	41	39
pork	142	141	130	123
poultry	n.a.	145	163	154

n.a. = not available.

Source: EUROSTAT - Agriculture, Forestry and Fisheries. Extraction date: 4 November 2007.

## Annexe 6. Farm gate prices of agricultural products (2000=100)

	Nominal value		Deflated <sup>(1)</sup>	
	1995	2006	1995	2006
Cereals (including seeds)	94.9	110.4	118.5	90.0
Wheat and spelt	94.1	108.6	117.6	88.5
Soft wheat and spelt	95.9	103.9	119.8	84.7
Durum wheat	93.2	110.0	116.4	89.6
Barley	96.0	113.1	120.0	92.2
Feed barley	95.3	112.1	119.1	91.3
Malting barley	98.9	122.3	123.6	99.7
Oats and summer cereal mixtures	101.1	109.5	126.3	89.2
Grain maize	94.3	116.9	117.8	95.3
Rice	93.7	73.0	117.1	59.5
Industrial crops	100.1	103.0	125.0	83.9
Forage plants	92.2	147.6	115.2	120.3
<b>Vegetables and horticultural products</b>	<b>71.9</b>	<b>132.3</b>	<b>89.8</b>	<b>107.8</b>
Fresh vegetables	70.4	131.0	88.0	106.7
Pulses	89.0	139.3	111.1	113.5
Tomatoes	66.6	115.2	83.2	93.9
Cabbage	92.0	122.5	114.9	99.8
Lettuce	75.4	136.6	94.2	111.3
Spinach	82.6	185.0	103.2	150.7
Cucumbers	69.3	127.6	86.6	104.0
Onions	77.0	142.4	96.2	116.0
Green beans	75.1	151.6	93.9	123.5
Peas	50.0	114.5	62.5	93.3
Plants and flowers	97.5	156.8	121.8	127.8
Potatoes (including seeds)	89.3	155.2	111.6	126.5
<b>Fruits</b>	<b>83.1</b>	<b>149.6</b>	<b>103.8</b>	<b>121.9</b>
Fresh fruit (excluding citrus fruit and grapes)	82.6	167.2	103.2	136.2
Dessert apples	83.0	146.6	103.7	119.5
Nuts and dried fruit	85.2	154.5	106.4	125.9
Dried fruit	87.0	136.3	108.7	111.1
Citrus fruit	93.9	151.5	117.3	123.4
Mandarins	85.5	127.9	106.9	104.2
Lemons	93.8	168.4	117.2	137.2
Grapes	86.8	111.7	108.4	91.0
Dessert grapes	86.8	125.7	108.4	102.4
Olives	74.9	142.1	93.6	115.8
Table olives	74.9	142.1	93.6	115.8
Table wine	92.8	125.4	n.a.	102.2
Olive oil	109.8	181.7	137.2	148.1
Other crop products	93.5	110.6	116.8	90.1
Forage seeds	93.5	110.6	116.8	90.1
<b>Crop output, including fruits and vegetables</b>	<b>88.9</b>	<b>138.5</b>	<b>111.1</b>	<b>112.9</b>
Crop output, excluding fruits and vegetables	99.6	135.2	124.4	110.2

**Annexe 6 (contd.)**

	Nominal value		Deflated <sup>(1)</sup>	
	1995	2006	1995	2006
Animals	85.9	123.9	107.3	101.0
Cattle	91.2	116.9	114.0	95.3
Pigs	85.7	123.6	107.0	100.7
Sheep and goats	81.0	129.6	101.1	105.6
Poultry	94.7	113.4	118.3	92.4
Other animals	81.2	122.9	101.4	100.1
Animal products	91.7	116.3	114.6	94.8
Milk	95.3	114.6	119.0	93.4
Eggs	73.9	115.5	92.3	94.1
Other animal products	80.0	133.4	99.9	108.7
<b>Animal output</b>	<b>88.4</b>	<b>120.2</b>	<b>110.4</b>	<b>97.9</b>
<b>Agricultural goods output</b>	<b>88.8</b>	<b>133.2</b>	<b>110.9</b>	<b>108.5</b>

n.a. = not available.

Note: 1. Excluding subsidies; 2. Deflated by means of the harmonised indices of consumer prices.

Source: EUROSTAT - Agriculture, Forestry and Fisheries. Extraction date: 4 November 2007.

## Annexe 7. Price indices of the means of agricultural production (2000=100, annual)

	Nominal value			Deflated <sup>(1)</sup>		
	1995	2001	2006	1995	2001	2006
<b>A. Intermediate consumption</b>	<b>83.3</b>	<b>101.5</b>	<b>129.6</b>	<b>n.a.</b>	<b>97.9</b>	<b>105.6</b>
Seeds and planting stock	81.9	103.8	124.5	n.a.	100.1	101.4
Energy and lubricants	71.1	98.0	140.5	n.a.	94.5	114.5
Fertilisers	89.0	111.4	144.7	n.a.	107.4	117.9
Straight fertilizers	84.2	114.6	157.3	n.a.	110.5	128.2
Nitrogenous fertilisers	84.0	115.6	159.7	n.a.	111.5	130.1
Phosphatic fertilisers	86.9	105.3	135.1	n.a.	101.5	110.1
Potassic fertilisers	84.0	103.5	125.2	n.a.	99.8	102.0
Compound fertilisers	91.8	109.6	137.9	n.a.	105.7	112.4
NP fertilisers	91.4	110.2	141.4	n.a.	106.3	115.2
NPK fertilisers	92.4	109.2	135.0	n.a.	105.3	110.0
Plant protection products and pesticides	80.3	101.7	115.5	n.a.	98.1	94.1
Fungicides	75.5	102.5	123.4	n.a.	98.8	100.5
Insecticides	78.6	101.6	114.1	n.a.	98.0	93.0
Herbicides	82.8	101.2	111.7	n.a.	97.6	91.0
Veterinary expenses	90.0	101.9	121.2	n.a.	98.3	98.8
Animal feeding stuffs	87.9	102.0	123.6	n.a.	98.3	100.7
Straight feeding stuffs	88.1	101.6	128.2	n.a.	98.0	104.5
Cereals and milling by-products	94.7	102.1	108.9	n.a.	98.4	88.7
Oilcakes	78.3	105.4	112.7	n.a.	101.6	91.8
Compound feeding stuffs	87.3	103.1	111.0	n.a.	99.4	90.4
Maintenance of materials	80.4	102.9	119.8	n.a.	99.2	97.6
Maintenance of buildings	80.4	103.8	127.1	n.a.	100.1	103.6
Other expenses	89.6	101.6	159.5	n.a.	98.0	130.0
<b>B. Capital formation</b>	<b>81.7</b>	<b>103.9</b>	<b>123.8</b>	<b>n.a.</b>	<b>100.2</b>	<b>100.9</b>
Agricultural machinery and equipment	82.8	104.2	124.4	n.a.	100.5	101.4
Rotovators and other 2 wheel equipment	80.2	102.8	118.4	n.a.	99.1	96.5
Machinery and plant for cultivation	74.3	103.1	130.7	n.a.	99.4	106.5
Machinery and plant for harvesting	79.7	101.7	112.9	n.a.	98.1	92.0
Farm machinery and installations	76.1	104.3	125.4	n.a.	100.6	102.2
Tractors	81.2	102.2	123.5	n.a.	98.5	100.6
Other vehicles	93.0	105.5	126.8	n.a.	101.7	103.3
Farm buildings (non-residential)	79.7	102.8	120.0	n.a.	99.1	97.8
Engineering and land improvement	75.1	104.7	131.3	n.a.	101.0	107.0
<b>C. Input total (A+B)</b>	<b>83.0</b>	<b>102.1</b>	<b>128.2</b>	<b>n.a.</b>	<b>98.4</b>	<b>104.5</b>

n.a. = not available.

Note: 1. Deflated by means of the harmonised indices of consumer prices.

Source: EUROSTAT - Agriculture, Forestry and Fisheries. Extraction date: 4 November 2007.

**Annexe 8. Total and agricultural external trade**

	1995	2000	2001	2002	2003	2004	2005	2006
	Million euros							
Total trade								
Exports	8451	12723	12675	11013	11830	12306	13834	16464
Imports	19800	36249	35742	33387	39650	42415	43459	50526
Balance	-11349	-23527	-23067	-22373	-27820	-30108	-29624	-34062
Agricultural products trade <sup>(1)</sup>								
Exports	1972	2487	2772	2321	2290	2247	2586	2826
Imports	3001	3880	3983	4066	4273	4541	4621	5126
Balance	-1029	-1393	-1211	-1744	-1984	-2294	-2035	-2300

Note: It refers to product list 0 (food and live animals) and 1 (beverages and tobacco) of the SITC Rev 3.

Source : EUROSTAT - External Trade. Extraction date: 9 November 2007.

**Annexe 9. Agricultural external trade(1) by main regions**

	1995		2000		2004		2005		2006	
	Million euros									
	exports	imports	exports	imports	exports	imports	exports	imports	exports	imports
Intra EU-25	1319	2579	1617	3290	1461	3519	1701	3547	1869	4022
Extra EU-25	653	422	870	589	786	1022	885	1074	957	1104

Note: It refers to product list 0 (food and live animals) and 1 (beverages and tobacco) of the SITC Rev 3.

Source : EUROSTAT - External Trade. Extraction date: 9 November 2007.

**Annexe 10. Agricultural external trade by main products - Imports**

Product list	Imports					
	1995		2005		2006	
	Mt	1000 euros	Mt	1000 euros	Mt	1000 euros
<b>Food and live animals</b>	<b>2970188</b>	<b>2595045</b>	<b>4676494</b>	<b>3934073</b>	<b>4941998</b>	<b>4403666</b>
Live animals other than animals of Div. 03	26758	45541	37590	83955	39441	86417
Meat and meat preparations	348971	722676	402465	940898	445208	1116477
Meat of bovine animals fresh, chilled or frozen	158752	400954	114999	381263	130371	432778
Other meat and edible meat offal fresh, chilled or frozen	177651	283789	268540	494970	290713	605678
Meat, offal preserved	588	1988	1384	6536	2647	8413
Meat, offal preserved n.e.s	11980	35945	17543	58128	21477	69607
Dairy products and birds' eggs	235515	483431	352039	627465	369770	664945
Milk, cream and products other than butter and cheese	162927	230505	249789	279757	256908	299636
Butter and cheese	7953	26834	10284	25628	9999	27223
Cheese and curd	61996	218604	85582	305333	96759	322950
Eggs	2638	7489	6385	12913	6103	13701
Fish	69943	151937	105518	348448	105834	385281
Fish live, fresh, frozen, chilled	35826	56298	45503	146212	47618	169972
Fish dried, salted, smoked	7489	21215	8152	33190	8280	39823
Crustaceans molluscs, fresh, chilled, frozen	16816	45514	37647	119245	34125	118197
Crustaceans molluscs, fresh, chilled, frozen, n.e.s.	9812	28909	14217	49802	15812	57290
Cereals and cereal preparations	1271563	310105	2038079	445481	2074777	506883
wheat, meslin	737928	131437	890545	121633	1100038	167323
Rice	6991	6779	16479	11372	32341	14891
Barley grain	121530	22364	285861	39582	314412	41822
Maize except sweet corn	304659	69121	640297	93454	481976	91593
Cereal grains n.e.s.	8492	1590	67763	5108	28823	4734
Flour, meal wheat, meslin	3593	1457	16308	4420	5463	3326
Cereal meal, flour n.e.s.	5933	1156	3891	1091	3109	1262
Cereal etc flours, starch	82437	76200	116935	168821	108615	181932
Vegetables and fruit	404799	296390	717287	611725	762190	647653
Vegetables, fresh/chill/frozen	179116	86756	263165	138382	306363	170522
Veg. root, tuber prep., pres. n.e.s	63338	52568	110468	90324	109934	105872
Fruit, nuts, fresh, dried	130106	113979	251242	287941	249337	264113
Fruit preserved and preparations	13295	16586	38487	47996	40314	48058
Fruit, veg. juices	18944	26500	53925	47083	56242	59088
Sugars, preparations and honey	97842	89986	166590	118519	217937	142675
Sugar, molasses, honey	90857	65741	156846	90749	208370	115638
Coffee, tea, cocoa	47251	179151	87779	259333	88615	286451
Coffee, and substitute	20671	100628	42229	106988	40244	119046
Cocoa	8761	17351	14086	28984	14327	29147
Chocolate, cocoa preper. N.e.s.	14305	53339	26119	105809	28690	121810
Tea and mate	570	2809	1818	11012	1404	8630
Spices	2943	5024	3527	6540	3951	7818
Feeding stuff for animals	377200	130510	645095	247838	704917	287145
Animal feed excl. unmilled cereals	377200	130510	645095	247838	704917	287145
Miscellaneous edible products	90348	185321	124052	250409	133308	279740
Margarine and shortening	13656	11919	17826	21210	18078	20990
Edible products n.e.s.	76692	173402	106226	229199	115230	258750

**Annexe 10 (contd.)**

Product list	1995		Imports 2005		2006	
	Mt	1000 euros	Mt	1000 euros	Mt	1000 euros
<b>Beverages and tobacco</b>	<b>133956</b>	<b>406163</b>	<b>307565</b>	<b>687203</b>	<b>283527</b>	<b>722542</b>
Beverages	99717	217466	266997	389766	232287	412124
Beverages non-alcohol n.e.s.	21497	16199	147464	75579	105394	63179
Alcoholic beverages	78221	201267	119533	314187	126893	348945
Tobacco and tobacco manufactures	34239	188696	40568	297436	51240	310418
Tobacco, raw and wastes	20342	74942	27166	119186	34010	109555
Tobacco, manufactured	13896	113754	13402	178250	17230	200862
Hide, skin 9excl. Fur) raw	9657	18824	1755	3809	1881	2869
Fur skins, pieces, raw	346	32067	307	69110	319	89250
Oilseeds	288763	87746	429490	132698	434841	130580
Oilseeds and oleaginous fruits	287165	86856	423241	130576	431345	129149
Cotton seeds	6291	9354	8587	17098	5215	15735
Oilseeds not soft oil	1598	890	6250	2122	3496	1432
Cotton	9634	16393	6527	7711	5421	5945
Fertilizers crude other than those of Division 56	481633	15817	383238	14235	203308	7712
Olive oil, virgin	1616	4241	2855	7433	1741	6636
Other olive oil and its fractions	1213	2067	898	2770	446	1425
Other than olive oil under headings 421.41 or 421.42	237	493	1959	3298	1552	3209
<b>Total agricultural products</b>		<b>3001208</b>		<b>4621275</b>		<b>5126208</b>

Source : EUROSTAT - External Trade. Extraction date: 10 November 2007.



**Annexe 11. Agricultural external trade by main products - Exports**

Product list	1995		Exports 2005		2006	
	Mt	1000 euros	Mt	1000 euros	Mt	1000 euros
<b>Food and live animals</b>	<b>2438623</b>	<b>1506559</b>	<b>2726609</b>	<b>2025431</b>	<b>2809679</b>	<b>2318712</b>
Live animals other than animals of Div. 03	858	770	1745	3161	1890	3566
Meat and meat preparations	26636	38453	26432	36652	24664	31788
Meat of bovine animals fresh, chilled or frozen	2594	5629	1076	4925	703	3383
Other meat and edible meat offal fresh, chilled or frozen	9428	12287	22274	21768	19869	17541
Meat, offal preserved	30	91	132	851	41	385
Meat, offal preserved n.e.s	14584	20446	2950	9109	4050	10479
Dairy products and birds' eggs	31349	101581	57357	173599	67140	210216
Milk, cream and products other than butter and cheese	13422	29350	28378	54530	34525	62657
Butter and cheese	139	189	64	177	52	150
Cheese and curd	16050	71012	24274	115958	30913	146055
Eggs	1739	1031	4640	2934	1650	1354
Fish	33984	133178	93335	343495	116867	417227
Fish live, fresh, frozen, chilled	15619	89295	59707	268680	77516	329815
Fish dried, salted, smoked	3445	9210	2442	7563	3044	7458
Crustaceans molluscs, fresh, chilled, frozen	10775	14156	24046	39959	30641	46014
Crustaceans molluscs, fresh, chilled, frozen, n.e.s.	4145	20516	7140	27292	5666	33941
Cereals and cereal preparations	552834	161410	843665	231130	605533	230743
wheat, meslin	334765	67536	197644	33881	361805	65890
Rice	117286	44529	74927	24193	95146	33550
Barley grain	0	0	5947	814	3215	463
Maize except sweet corn	16003	2196	426415	56005	16861	5304
Cereal grains n.e.s.	133	50	33	39	11	41
Flour, meal wheat, meslin	21396	4885	24707	6187	20050	5228
Cereal meal, flour n.e.s.	19504	1664	6199	928	6835	966
Cereal etc flours, starch	43749	40550	107793	109084	101610	119301
Vegetables and fruit	1651030	966444	1420365	1058095	1496396	1192952
Vegetables, fresh/chill/frozen	108608	99045	76904	96528	108874	132617
Veg. root, tuber prep., pres. n.e.s	224755	200788	229756	266434	283195	313161
Fruit, nuts, fresh, dried	838951	365124	741181	433926	701199	435465
Fruit preserved and preparations	441968	281520	350684	250994	385303	294489
Fruit, veg. juices	36748	19967	21840	10212	17826	17221
Sugars, preparations and honey	10836	18248	120210	48747	273356	91911
Sugar, molasses, honey	4028	1817	111825	25579	230750	68519
Coffee, tea, cocoa	21113	47307	9190	24018	7111	20939
Coffee, and substitute	7759	21916	2775	10221	1616	9228
Cocoa	162	187	368	568	550	819
Chocolate, cocoa preper. N.e.s.	12402	22017	5672	11657	4547	9494
Tea and mate	57	123	32	258	161	360
Spices	734	3064	343	1315	237	1037
Feeding stuff for animals	90363	13903	95261	30048	148299	31714
Animal feed excl. unmilled cereals	90363	13903	95261	30048	148299	31714
Miscellaneous edible products	19620	25266	59050	76484	68423	87658
Margarine and shortening	4858	5185	8621	6206	7318	6417
Edible products n.e.s.	14763	20081	50429	70278	61105	81240

**Annexe 11 (contd.)**

Product list	1995		Exports 2005		2006	
	Mt	1000 euros	Mt	1000 euros	Mt	1000 euros
<b>Beverages and tobacco</b>	<b>442896</b>	<b>465511</b>	<b>349923</b>	<b>560562</b>	<b>289463</b>	<b>507178</b>
Beverages	231109	158110	235416	130697	185819	134706
Beverages non-alcohol n.e.s.	80933	14417	153369	13523	98241	13314
Alcoholic beverages	150175	143692	82048	117174	87578	121392
Tobacco and tobacco manufactures	211787	307401	114507	429865	103644	372472
Tobacco, raw and wastes	198409	234748	94007	297088	85957	240078
Tobacco, manufactured	13379	72653	20500	132777	17688	132394
Hide, skin 9excl. Fur) raw	6692	27185	12733	17818	12929	23478
Fur skins, pieces, raw	13	1330	4	1128	35	4597
Oilseeds	166546	21869	279415	52446	219736	55293
Oilseeds and oleaginous fruits	161268	19117	276597	47916	215766	48746
Cotton seeds	158943	16918	272475	43760	212094	44887
Oilseeds not soft oil	5279	2752	2817	4529	3970	6547
Cotton	241255	300322	256556	222953	351044	329326
Fertilizers crude other than those of Division 56	290	77	840	265	1260	388
Olive oil, virgin	133554	366357	93224	307319	100580	368528
Other olive oil and its fractions	6413	16295	5555	16414	5290	19889
Other than olive oil under headings 421.41 or 421.42	43739	57616	22946	28075	35456	54286
<b>Total agricultural products</b>		<b>1972070</b>		<b>2585993</b>		<b>2825890</b>

Source : EUROSTAT - External Trade. Extraction date: 10 November 2007.

**Annexe 12. EAGGF-Guarantee expenditure, 2005 (million euros)**

	Greece (million euros)	EU25	Share (%)
<b>Plant products</b>	<b>2360</b>	<b>29469</b>	<b>8.0</b>
Market measures on cereals	0	666	0.0
Rice	33	436	7.6
Direct payments for arable crops	503	17146	2.9
Food programmes	3	222	1.4
Sugar	2	1793	0.1
Olive oil	462	2311	20.0
Textile plants	727	973	74.7
Fruit and vegetables	223	1748	12.7
Product of wine-growing sector	20	1267	1.6
Tobacco	362	923	39.2
Other plant products	27	601	4.4
Direct aid of horizontal measures	0	1453	0.0
<b>Animal products</b>	<b>351</b>	<b>12889</b>	<b>2.7</b>
Milk and milk products	7	2755	0.2
Beef and veal	93	8176	1.1
Sheepmeat and goatmeat	250	1837	13.6
Pigmeat, eggs, poultry and bee keeping	2	141	1.6
<b>Rural development</b>	<b>157</b>	<b>6846</b>	<b>2.3</b>
<b>Total</b>	<b>2754</b>	<b>48928</b>	<b>5.6</b>

Source: European Commission, 2006.

### Annexe 13. Data on fisheries

	2004	2005	2006
Fleets (number of fishing vessels)	18545	18269	18045
Fleets (tonnage, (t) )	95555	93515	92792
Fleets (totalpower (kW) )	550684	537181	530831

Source: Eurostat/DG FISH.

	2003	2004	2005
Capture fisheries (capture, (1000t) )	89.6	91.1	90.4
Capture fisheries ( value, (1000euro) )	274914.5	291913.7	314718.4
Employment (number) *	38873	38161	n.a.
Aquaculture in seawater (number of units)	921	930	n.a.
Aquaculture in seawater (value, 1000euros)	362358	360540	n.a.
Aquaculture in seawater (quantities, 1000t)	97.9	102.5	n.a.
Processing (value, 1000 euros)	197716	184563	n.a.
Consumption (quantities,1000t)	240	243	n.a.
Consumption fresh product (quantities,1000t)	174	184	n.a.
Import (value, 1000euros)	412221	390435	n.a.
Export (value, 1000euros)	319641	338812	n.a.
Import fresh (value, 1000euros)	68719	75368	n.a.
Export fresh (value, 1000euros)	237505	244629	n.a.

\* permanent employees, including sea fishing, aquaculture, metapoiisi

Source: NSSA.