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AGRICULTURAL STATISTICS

2022

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The 2022 winter cereal campaign was the worst ever, having even been lower than in 2012, matching the worst cereal harvests with the most severe droughts.

The decrease in apple production was 20.9% compared to last year (which was the second most productive harvest in the last 35 years). The pear harvest ended with a 41.3% reduction in production compared to the previous campaign, due to adverse weather conditions and brown spot disease.

In Cova da Beira, the cherry drop was lower than expected and the harvest took place in good conditions, which contributed to a production slightly higher than that achieved in the previous campaign (+3.1%), being the most productive ever. In orange, the increase in production, both in early and late varieties, contributed to the best campaign ever, 4.0% above the production recorded in 2021.

In Portugal, 10 439 rural fires broke out in 2022, 26.8% more occurrences than in 2021. The number of ignitions, although higher than the last two years and the average of the last five-year period, was about half the average number of fires recorded in the last 20 years

The commercial deficit of agricultural and food products (excluding beverages and fishery products) reached EUR 5,222.8 million in 2022, which represents an increase of EUR 1,374.5 million compared to the previous year.

In 2022, the deficit at the level of self sufficiency of meat worsened, but Portugal maintained a self sufficiency surplus in milk for public consumption, wine, olive oil and rice.

Sharp increases in price indexes of agricultural goods output (+20.5%), goods and services currently consumed in agriculture (+30.0%) and of goods and services contributing to agricultural investment (+10.7%) were recorded.

Statistics Portugal presents the 2022 compendium of “Agricultural Statistics” edition, reporting the information to the last available reference period and a wide scope of data concerning national agriculture activity. The publication is organized into 12 chapters, with links to the Statistics Portugal web portal indicators at the end of each one, whenever available.



CROP PRODUCTION - CROP YEAR 2021/2022

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In spring crops, the rise in the international price of grain maize had no impact on the sown area (+0.2%, compared to 2021), possibly due to the significant increase in the prices of means of production, especially fertilizers, energy and fuel.

Rice production was 155.6 thousand tonnes, which corresponds to a decrease of 11.6% compared to the previous campaign.

Tomato for processing production also decreased by 19.7% compared to the previous campaign, either due to the reduction in area, or to the high summer temperatures (which affected flowering and caused many occurrences of scald in the growing fruits) and to the precipitation at the end of the campaign, which caused rot and delays in maturation and harvesting.

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The entry into production of the new almond trees in the Alentejo was sufficient to compensate for the decrease

in production registered in Trás-os-Montes, essentially due to the drought and late frosts. Global production increased by 11.5% compared to the previous campaign, being the most productive in the last 30 years.

Rainfall in the second half of October was late for most chestnut groves, which were at the beginning of fruit fall, not preventing a decrease, vis-à-vis the previous campaign, of 39.9% (the lowest productivity of the last 37 years).

The extreme heat of July and August led to

very frequent situations of scalding in the vines and drying out of the bunches, as well as to the stoppage of the development of the grapes, a situation unblocked by the September rains. Production was 7.3% lower than the 2021 harvest.

Olive oil production was 1.378 million hectolitres (about 126 thousand tonnes), which corresponds to a decrease of 39.8% compared to the 2021 campaign. It should be noted that, even in a year as adverse and demanding for olive oil production as 2022, the fourth highest production ever was achieved, just below the campaigns of 2021, 2019 and 2017.

ANIMAL PRODUCTION - 2022

Total meat production was 914 thousand tonnes, reflecting almost a maintenance (+0.3%) when compared with 2021. Total bovine, pig, sheep, goat and horse meat had a decrease of 1.6%, with a total production of 490 thousand tonnes.

Poultry meat (includes chicken, turkeys, and ducks) was higher by 2.9%, reaching 410 thousand tonnes.

Beef meat (104 thousand tonnes) and goat meat (1.3 thousand tonnes) rose by 0.8% and 4.9%, respectively, vis-à-vis 2021.

On the other hand, pig meat (370 thousand tonnes) and sheep meat (14.8 thousand tonnes) production recorded decreases of 2.0% and 7.1%, respectively.

Broiler meat production (329 thousand tonnes) grew by 5.2%, while the turkey meat (51.2 thousand tonnes) and duck meat (10.3 thousand tonnes) segments had reductions of 6.9% and 1.2% respectively, compared to 2021.



Chicken egg production totalled 150 thousand tonnes, an increase of 5.5%, with the volume of eggs for consumption (129 thousand tonnes) up by 5.9% and eggs for hatching (21.0 thousand tonnes) increasing by 3.1%, when compared to 2021.



Total milk accounted for 1 969 million liters, corresponding to 3.3% less than in 2021, with the volume of cow's milk (1 871 million liters) decreasing by 3.4% and sheep's and goat's milk also reducing by 2.4% and 2.7%, respectively.

The production of the national dairy industry in 2022 resulted in a lower total volume of dairy products, which was due to the decrease in both fresh products (milk for consumption decreased by 1.8%) and processed products (butter and milk powder decreased by 12.7% and 23.3%, respectively).

FOREST PRODUCTION

In Portugal, 10 439 rural fires broke out in 2022, 26.8% more occurrences than in 2021. The number of ignitions, although higher than the last two years and the average of the last five-year period, was about half the average number of fires recorded in the last 20 years.

The area burned in Portugal in 2022 was 110.1 thousand hectares in the mainland and 0.09 thousand hectares in the R.A.M (28.4 thousand hectares and 0.07 thousand hectares in 2021, respectively), which places 2022 as the fourth most severe year of the last decade (2013-2022), with almost double the average area burned in the last five-year period (58.8 thousand hectares).

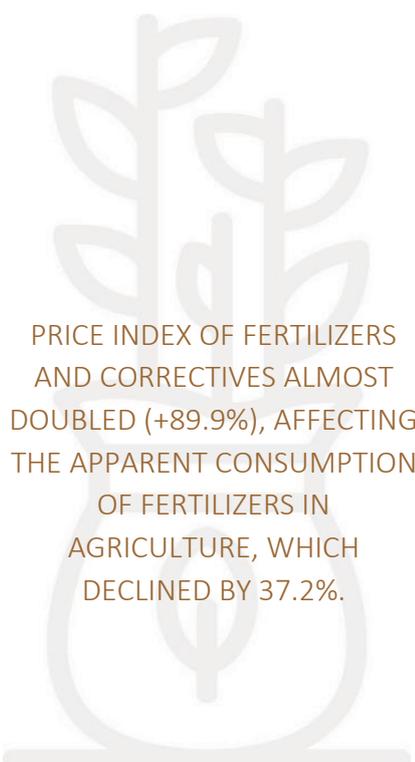
In mainland Portugal, in 2022, the hunting area was distributed over 6,997 thousand hectares spread in 5,248 hunting areas, 103 more spaces spread over 18.1 thousand hectares more than in 2021.

The 115,726 hunting licenses issued in the 2021/2022 hunting season (111,926 in 2020/2021), means an increase of 3.4%, generating revenue of 5.7 million euros, 3.8% higher than in 2020/2021.





AGRICULTURE AND THE ENVIRONMENT



PRICE INDEX OF FERTILIZERS
AND CORRECTIVES ALMOST
DOUBLED (+89.9%), AFFECTING
THE APPARENT CONSUMPTION
OF FERTILIZERS IN
AGRICULTURE, WHICH
DECLINED BY 37.2%.

In 2021, 9.6 thousand tonnes of plant protection products were sold, a reduction of 1.3% vis-à-vis 2020. Sulphur decrease (-11.2%), the main active substance sold in Portugal (35.7% of the total), contributed to this decline. The occurrence of accumulated precipitation values between March and July 2021 (period in which most applications of sulphur powder are made), significantly lower than in the same period of 2020 (165mm, compared to 253mm in 2020), limited the proliferation of fungi and consequently the application of this fungicide.

Apparent consumption of fertilizers decreased by 37.2% in 2022. For this decrease contributed the higher prices of fertilizers and correctives, whose respective price index almost doubled compared to 2021 (+89.9%).

In 2022, the gross nitrogen balance in soil reached 122 thousand tonnes (143 thousand tonnes of nitrogen in 2021), resulting from a decrease in soil nitrogen incorporation (-40 thousand tonnes of nitrogen), sharper than the decrease in nitrogen removed by crops (-19.1 thousand tonnes).

The reduction in the incorporation of nitrogen in the soil was mainly due to a lower application of inorganic fertilisers (-35.5 thousand tonnes). The decrease in the removal of this macronutrient by crops was a consequence of reductions in production resulting from drought, unfavourable weather conditions and the increase of input prices.

The phosphorus balance increased by 24.7% in 2022, which corresponds to an excess of 9.5 thousand tonnes (7.7 thousand tonnes in 2021). The strong decrease in the removal of this nutrient from the soil was responsible to this increase (-20.0%, corresponding to a reduction of 8.0 thousand tonnes of phosphorus), sharper than the decrease in incorporation into the soil (-12.8%, equivalent to -6.2 thousand tonnes of phosphorus).

In 2021, agricultural activity accounted for 52.5 Gg of ammonia emissions, equivalent to 13.2 kg of NH₃ emissions per hectare of utilised agricultural area (13.3 kg of NH₃ emissions per hectare in 2020). Compared to 2020, ammonia emissions per hectare of agricultural area decreased by 0.7%.

Agricultural activity, in the year 2021, was responsible for 7.3 million tonnes of GHG emissions (eq. CO₂), which corresponds to 1.8 tonnes of GHG emissions (eq. CO₂) per hectare of agricultural area used (0.5% reduction compared to 2020).

The direct energy consumption of agricultural activity reached 17.6 million GJ in 2021, which results into a 3.0% growth compared to 2020



FOOD, BEVERAGE AND TOBACCO INDUSTRY - 2022

Manufacture of food products remained the main activity of national industrial production with 14.5% of total sales in 2022 (14.3% in 2021). In 2022, 77.7% of the value of manufacture of food products sales was destined to national market (-0.7 p.p. compared to 2021) and 16.6% to European Union (+0.5 p.p. compared to 2021). The value of manufacture of food products sales in 2022 reached EUR 15.2 billion, more EUR 2.9 billion compared to 2021.



MANUFACTURE OF FOOD
PRODUCTS CONTRIBUTED
WITH 14.5% OF TOTAL
SALES
AND
REMAINED AS THE MAIN
INDUSTRIAL PRODUCTION

The “slaughtering of animals, processing and preserving of meat and meat products” activity was the most valued of the Manufacture of food products with 19.3% of total sales value (20.6% in 2021).

The manufacture of beverages accounted for EUR 3.5 billion of sales in 2022, more EUR 385 million than in 2021, while the “manufacture of wines” accounted for 51.8% of total sales (56.2% in 2021).

Manufacture of tobacco products sales totalled EUR 700.1 million, EUR 16 million lower than in 2021.

INTERNATIONAL TRADE - 2022

The commercial deficit of agricultural and food products (excluding beverages and fishery products) reached EUR 5,222.8 million in 2022, which represents an increase of EUR 1,374.5 million compared to the previous year.



TRADE BALANCE DEFICIT FOR
“AGRICULTURAL AND FOOD
PRODUCTS” REACHED
EUR 5.2 BILLION, MORE 1.4
BILLION COMPARED TO 2021

“Cereals” was the group that most contributed to this evolution, reaching the highest deficit (EUR -1,276.1 million) in the set of “Agricultural and food products” (excluding beverages and fishery products), reflecting a EUR 429.6 million increase compared to 2021.

The trade balance of “Beverages, spirits and vinegars” decreased by EUR 64.4 million, recording a commercial surplus of EUR 712.7 million in 2022.

The trade balance of forest products reached EUR 3.293,8 million in 2022, increasing by EUR 558,2 million compared to the previous year.



SUPPLY BALANCES

In 2022, the domestic market contributed 78.2% of the amount of meat needed to satisfy national consumption needs (81.0% in 2021). Poultry meat was the most consumed (45.2 kg/inhabitant, compared to 43.1 kg/inhabitant in 2021), followed by pig meat (42.5 kg/inhabitant versus 41.8 kg/inhabitant in 2021).

Self-sufficiency for all dairy products (milk and dairy products) in 2022 was 93.0%, compared to 95.9% in 2021. Milk for public consumption remained in surplus (111.4%), but some dairy products continue in deficit, such as acidified milks (56.1%), milk-based drinks (80.0%) and cheese (62.6%).

In 2021/2022, self-sufficiency of cereals (except rice) was 20.1% (+0.9 p.p. compared to the previous campaign), with an increase in grain production (+3.4%) and a decrease in imports (-1.5%), compared to 2020/2021.

The total amount of fruit available for human consumption in 2021/2022 increased by 2.6%, equivalent to a consumption of 151.2 kg of fruit per inhabitant (148.1 kg in the 2020/2021 campaign). The degree of self-sufficiency stood at 82.8%, i.e., 17.2 p.p. below self-sufficiency, but the highest in the period under review (2018/2019-2021/2022).

In 2021, national olive oil production reached a maximum of 188 thousand tonnes, increasing by 75.7% compared to 2020. Following this increase, olive oil presented a self-sufficiency degree of 264.8%, a surplus of 164.8 p.p., being the highest value of the entire available series.

In the 2021/2022 campaign, wine self-sufficiency stood at 113.0% (114.9% in 2020/2021). Compared to the previous campaign, there was a significant increase in production (+14.7%), with human consumption increasing by 14.3%, mainly in PDO and PGI wines.

IN 2022, THE DEFICIT AT THE LEVEL OF SELF SUFFICIENCY OF MEAT WORSED.

PORTUGAL MAINTAINED A SELF SUFFICIENCY SURPLUS IN MILK FOR PUBLIC CONSUMPTION, WINE, OLIVE OIL AND RICE



AGRICULTURAL PRICE STATISTICS – 2022

The agricultural goods output price index registered an increase of 20.5%. This growth was due to the increases of 14.9% in the crop output price index and 29.6% in the animal output price index.

The price index of goods and services currently consumed in agriculture increased by 30.0% and the price index of goods and services contributing to agricultural investment grew by 10.7%.



ECONOMIC ACCOUNTS FOR AGRICULTURE – 2022

In 2022, Income from agricultural activity, in real terms, per annual work unit (AWU), registered a sharp decrease (-11.7%), because the nominal reduction in Gross Value Added (GVA) (-8.7%) and an increase in other production subsidies (+3.8%).



The reduction in GVA, in nominal terms, resulted from an increase in Intermediate Consumption higher than the increase in Output in the agricultural industry (+23.7% and +11.7%, respectively). In real terms, there was a less accentuated decrease in GVA (-5.8%), reflecting the reductions in volume of Production (-5.6%) and Intermediate Consumption (-5.5%).



ECONOMIC ACCOUNTS FOR FORESTRY – 2021

In 2021, the Gross Value Added (GVA) of forestry decreased by 1.8% in volume and increased by 0.7% in value, interrupting the nominal decrease recorded in the two previous years.

Cork (-14.7%) and forestry services (-2.5%) were decisive in the negative evolution of production in real terms (-0.7%). The nominal increase in production (+1.6%) reflected the increase in wood production (+12.1%), which moderated the effect of decreases in production of cork (-17.4%) and forestry services (-1.4%).



FORESTRY GVA
INCREASED BY
0.7% AND
INTERRUPTS THE
DOWNWARD
TREND OF THE
LAST TWO YEARS