Draft 2004 update of supply and demand for concentrated organic feed in the EU (WP42)

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Data sources: The following countries' data could be updated for 2004 from the sources available to us (ministries, Eurostat).

For land use:

AT - Bundesministerium für Land- und Forstwirtschaft, Umwelt und Wasserwirtschaft
URL <http://www.gruener-bericht.at/cms/>

DE - Zentrale Markt- und Preisberichtstelle für Erzeugnisse der Land-, Forst- und Ernährungswirtschaft GmbH
URL <http://www.zmp.de/dialog/Formular_Strukturdaten2004.asp>

DK - The Danish Plant Directorate. URL <http://www.pdir.dk>

ES - Ministry of Agriculture, Fisheries and Food
URL <http://www.mapya.es/es/alimentacion/pags/ecologica/info.htm>

FI - The Plant Production Inspection Centre (KTTK). Statistics supplied by email.

FR - L'Agence BIO. URL <http://www.agencebio.org/actualites.asp?n1=3>

HU - Report on the Activity of Biokontroll Hungária KHT: YEAR 2004
URL <http://www.biokontroll.hu/english/>

IT - SINAB. URL <http://www.sinab.it/>

PT - Instituto de Desenvolvimento Rural e Hidráulica.
URL < http://www.idrha.min-agricultura.pt/agricultura_biologica/dados_estatisticos.htm>

NL - Jaarrapport EKO-monitor. URL <http://www.biologica.nl/eko-monitor/>

SE - KRAV. URL <http://statistik.krav.se/>

UK - Organic Statistics - United Kingdom
URL <http://www.statistics.defra.gov.uk/esg/statnot/orguk.pdf>

Eurostat data on crops was used for BE, GR, NO, CZ, LV, LT, SK, and SI.
URL <http://www.europa.eu.int/comm/eurostat>

For livestock numbers:
All of the above, except for those using Eurostat as a data source, and Germany, where 2004 organic livestock data are expected in January 2006.

For details on methodology, assumptions and balances for 2002 and 2003 see: **PADEL, S. (2005) Overview of supply and demand for concentrated organic feed in the EU in 2002 and 2003** with a particular focus on protein sources for mono-gastric animals. Aberystwyth, Institute of Rural Sciences, University of Wales, Aberystwyth.
http://www.organic-revision.org/pub/wp42_feedoverview_final_deliverable.pdf

Summary of key trends and changes in 2004

The total organic flock in the EU 25 appears to have increased by between 6 and 9 per cent, depending on stock category. Greatest increases occurred for sheep in France, Italy, Spain and the UK. In the other livestock categories, increases in some countries were balanced by decline in others, leading to overall small increases (see Table 3 update[1]).

The production area of organic cereals increased between 2003 and 2004 by approximately 6 %. Significant reduction (9%) in the cereals area seems to have occurred in Italy, Spain and Hungary, whereas the area increased in Austria, Greece and Portugal (see Table 4 update).

The area for pulses appears to have declined by a further 14% in the EU 25. Reductions occurred in particular in France and Italy as two important producers of organic pulses, but increased in some other countries. There is greater uncertainty in the data for pulses, as not as many countries report data for pulses separately.

On 100% organic rations the demand for concentrate feeds for all organic livestock currently kept in the EU would have risen from approximately 1.1 million to 1.2 million tonnes. The proportions remain unchanged (65% of this demand is for cereals, 26% for pulses that could be grown in most regions of the EU, and 9% for high quality protein sources) (see Table 5 update).

In all three years, the EU would have grown more than sufficient organic cereals to feed all organic livestock on a 100% organic diet. For organic cereals, there seems to be a surplus of supply over demand that would allow for further increases in stock numbers at current feed production levels.

A potential deficit for home grown pulses that was projected for 2003 is likely to have increased further in 2004, because of reductions in the area for organic pulses. It appears that the intended shift to 100% organic diets has not stimulated increases in the production of organic pulses in the EU.

[1] Table numbering refers to the main report.

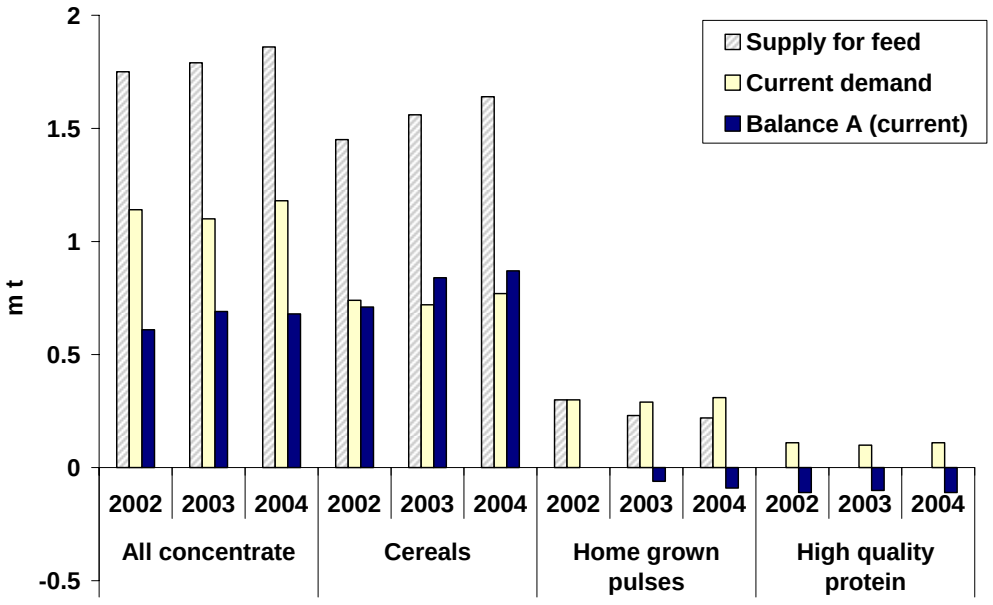
Table 3 update: Numbers of organic animals in the EU 25 in 2002 to 2004

Animal category	2002	2003	2004	Change 2004/2003
Bovine	1.39 million	1.47 million	1.56 million	106%
Sheep	1.71 million	1.64 million	1.88 million	109%
Pigs	552,000	473,000	493,000	104%
Chicken (layers and broilers)*	16.1 million	17.3 million	18.34 million	106%

*Other categories of poultry were ignored because of the very limited amount of data available.
Source: Own data

Table 4 update: Production of organic cereals and pulses in the whole EU 25 in 2002 to 2004

Land use	2002 (ha)	2003 (ha)	2004 Estimate (ha)	2002 (t)	2003 (t)	2004 Estimate (t)	Major producing countries
Cereals	881,700	948.144	994,230	2.65 million	2.79 million	2.91 million	Italy, Germany, Spain and France
Pulses	109,500	88,400	75,375	328,000	265,000	230,000	Italy, Germany, France and Austria



Source: Own data

Figure 4 update: Calculated balance of demand and supply of organic concentrate feed in the EU 25 for 2002 and 2003 (million tonnes)

Table 5 update: Supply and demand of organic concentrate feeds in 2002 to 2004 (million t)

	All concentrate			Cereals			Home grown pulses			High quality protein		
Supply	2002	2003	2004	2002	2003	2004	2002	2003	2004	2002	2003	2004
Production (3t/ha)	2.97	3.10	3.23	2.65	*2.84*	2.98	0.33	*0.26*	0.25	0	*0*	-
% Animal feed				55%	55%	55%	90%	90%	90%			
Supply for feed	**1.75**	**1.79**	**1.86**	**1.45**	***1.56***	**1.64**	**0.30**	***0.23***	**0.22**	**-**	-	**-**
Demand	2002	2003	2004	2002	2003	2004	2002	2003	2004	2002	2003	2004
Ruminants	0.64	0.65	0.68	0.45	0.46	0.49	0.19	0.19	0.20	-	-	-
Pigs	0.20	0.17	0.18	0.13	0.11	0.12	0.03	0.03	0.03	0.03	0.03	0.03
Poultry	0.30	0.28	0.32	0.15	0.14	0.16	0.08	0.07	0.08	0.07	0.07	0.08
Overall demand	**1.14**	**1.10**	**1.18**	**0.74**	**0.72**	**0.77**	**0.30**	**0.29**	**0.31**	**0.11**	**0.10**	**0.11**
Balance A (current)	**0.61**	**0.69**	**0.68**	**0.71**	***0.84***	**0.87**	**-**	**-** ***0.06***	**- 0.09**	**- 0.11**	**- *0.10***	**- 0.11**
Area equivalent (1000 ha)	203	230	227	238	*281*	290	0	*-19*	-28	-36	-32	-36
Percent of total	100%	100%	100%	***65%***	***65%***	***65%***	***26%***	***26%***	***26%***	***10%***	***9%***	***9%***
Sensitivity analysis												
Higher yield												
Production (3.5 t/ha)	3.47	3.62	3.77	3.09	*3.31*	3.48	0.38	*0.30*	0.29	-	-	-
Supply for feed	2.04	2.09	2.18	1.70	*1.82*	1.91	0.34	*0.27*	0.26	0	*0*	-
Balance B (higher yield)	**0.90**	**0.99**	**1.00**	**0.96**	***1.10***	**1.14**	**0.04**	**- *0.02***	**- 0.05**	**- 0.11**	**- *0.10***	**- 0.11**
Change to Balance A (m tonnes)	*0.29*	*0.30*	*0.32*	*0.25*	*0.26*	*0.27*	*0.04*	*0.04*	*0.04*	-	-	-
Modified rations for pigs and poultry												
Demand modified pigs and poultry only	1.13	1.09	1.17	0.74	0.72	0.77	0.34	0.32	0.35	0.05	0.05	0.05
Balance C (modified P&P)	**0.62**	**0.70**	**0.69**	**0.71**	**0.84**	**0.87**	**- 0.04**	- 0.09	**- 0.13**	**- 0.05**	- 0.05	**- 0.05**
Change to Balance A (m tonnes)	*0.01*	*0.01*	*0.01*	*0.00*	*- 0.00*	*- 0.00*	*- 0.04*	*- 0.03*	*- 0.04*	*0.06*	*0.05*	*0.06*
Modified rations all animals												
Demand with modified rations all species	0.95	0.91	0.98	0.58	*0.56*	0.61	0.32	*0.30*	0.32	0.05	*0.05*	0.05
Balance D (modified all)	**0.80**	**0.88**	**0.88**	**0.87**	***1.00***	**1.03**	**- 0.02**	**- *0.07***	**- 0.10**	**- 0.05**	**- *0.05***	**- 0.05**
Change to Balance A (m tonnes)	*0.19*	*0.19*	*0.20*	*0.16*	*0.16*	*0.16*	*- 0.02*	*- 0.01*	*- 0.01*	*0.06*	*0.05*	*0.06*