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AGRICULTURAL STATISTICS
2023

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The autumn/winter 2022/23 cereal grain campaign was greatly marked by the severe spring drought, being the worst ever for all cereal species.

Wine production increased, reaching 7.4 million hectolitres, the highest result since 2001.

Olive oil production exceeded 1.75 million hectolitres (160.8 thousand tons), which corresponds to the second most productive olive growing campaign of all time.

Total meat production stood at 904 thousand tonnes, reflecting a decrease of 1.1% compared to 2022.

In 2023, the burned area in Portugal corresponds to 34.5 thousand hectares on the mainland and 5.2 thousand hectares in the Madeira Autonomous Region, which placed 2023 as the third least severe year in the last decade.

Apparent consumption of fertilisers grew by 38.6% in 2023, largely due to the decrease in the price index for fertilisers and soil improvers (-24.8%).

The value of manufacture of food products sales in 2023 reached 17.0 billion Euros, more 1.3 billion Euros compared to 2022.

The commercial deficit of agricultural and food products (excluding beverages and fishery products) reached EUR 5,512.7 million in 2023, an increase of EUR 315.1 million compared to the previous year.

Poultry meat was the most consumed (47.2 kg/inhabitant, compared to 45.2 kg/inhabitant in 2022), followed by pig meat (41.7 kg/inhabitant compared to 42.4 kg/inhabitant in 2022).

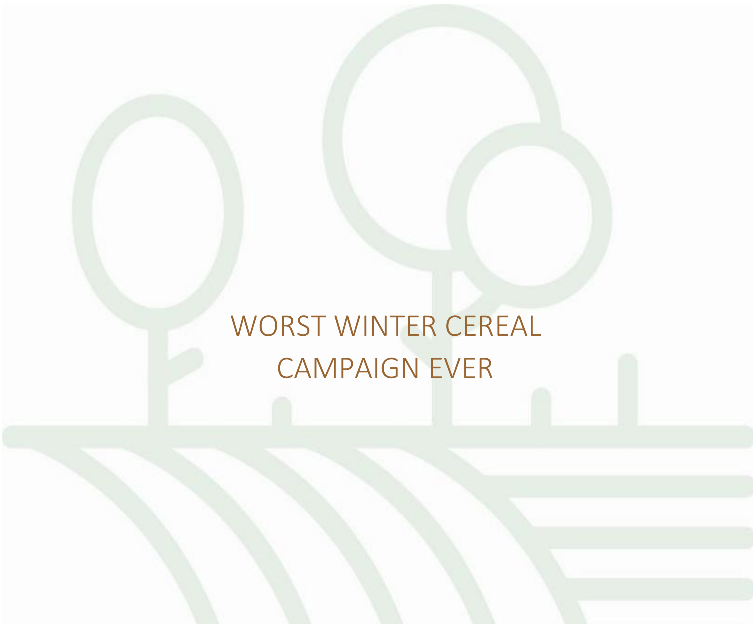
In 2023, the Income from agricultural activity, in real terms, per work annual unit (AWU), registered an increase (+8.5%).

Statistics Portugal presents the 2023 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 11 chapters, with links to the Statistics Portugal web portal indicators at the end of each one, whenever available.

CROP PRODUCTION - CROP YEAR 2022/2023

The 2022/2023 crop year in mainland Portugal was characterized in meteorological terms as extremely hot, being the hottest one since there are systematic records (crop year 1931/1932). Bear in mind that of the nine crop years that recorded average temperatures above 16.0°C, five occurred in the last decade. The crop year recorded a total rainfall of 947.8mm (103.5mm higher than the 1981-2010 normal), classifying it as rainy. However, spring 2023 was the second driest since 1931 (behind spring 2009, with 96.3mm) and the warmest of this century.

The autumn/winter 2022/23 cereal grain campaign was greatly marked by the severe spring drought, being the worst ever for all cereal species, as result of area (except for barley) and yield decreases.



The accumulated rainfall in autumn/winter made it possible to recover storage levels in reservoirs and private irrigation systems, allowing the irrigation campaign to proceed smoothly. Despite occasional difficulties with the flow and storage of grain maize, due to the concentration of harvests before the rains, there was an increase in production of 7%, compared to 2022. Rice production grew by 15% due to increases in area and, mainly, in yield. The tomato for processing area was 17.2 thousand hectares (+13%) and production was 1.69 million tons (+19%), placing this harvest as the second most productive.

Apple production was similar to 2022 harvest, although in the Oeste region it registered a drop of 15%. By contrast, production in Trás-os-Montes increased by around 8%, with part of the production diverted to industry.

For the second consecutive year, pear production recorded a decrease (-11%, compared to 2022), being the worst harvest since 2012 due to adverse weather conditions. The intensification of fire blight has put additional pressure on the sector, forcing the uprooting and abandonment of many orchards in the affected areas.

Cherry production was 11.8 thousand tons, which corresponds to less than half of that achieved in 2022. The orchards were strongly affected by adverse climatic conditions that affected the entire cycle, from floral differentiation, flowering and fruit setting to maturation.

Kiwi production fell by 8%, but the quality of the fruits was very good, showing regular sizes, with a positive impact on prices.

Apart from lemon, citrus showed a significant reduction in production, explained by the good production of the previous year and the severe drought, particularly in the Algarve, where there were restrictions on the use of water for irrigation. In late orange varieties, the decrease was around 50%, contributing decisively to the overall decrease of 26%.

For the third consecutive year, chestnut production was affected by phytosanitary problems, worsened by droughts, with an impact on the quality and quantity of global harvested production, which was 1/3 lower than the average for the last five years.

Wine production increased in almost all regions, reaching 7.4 million hectolitres, the highest value since 2001. In general, the wines presented a complex structure and balance between alcohol content, acidity and tannins.

Olive oil production exceeded 1.75 million hectolitres (160.8 thousand tons), which corresponds to the second most productive olive growing campaign of all time. However, the high moisture content of the olives made oil extraction difficult, which resulted in a smaller yield.

ANIMAL PRODUCTION - 2023

Total meat production stood at 904 thousand tonnes, reflecting a decrease of 1.1% compared to 2022.

Total bovine, pig, sheep, goat and horse meat (468 thousand tonnes) fell by 4.3%, while the production of poultry meat (including chickens, turkeys and ducks) grew by 2.7%, reaching 421 thousand tonnes.

INCREASES IN PRODUCTION OF POULTRY MEAT, EGGS AND DAIRY PRODUCTS

All four types of meat, beef (98 thousand tonnes), pork (356 thousand tonnes), sheep (12.4 thousand tonnes) and goat (1.1 thousand tonnes) showed reductions compared to 2022, which were of 5.1%, 3.6% and an identical decrease of 16.4% for sheep and goats, respectively.

Broiler meat production (337 thousand tonnes) grew by 2.3%, as did duck meat (12.7 thousand tonnes), which showed a positive variation of 23.8%. On the other hand, turkey meat fell by 2.3% compared to 2022, with production of 50.1 thousand tonnes.

Total chicken egg production totalled 152 thousand tonnes, an increase of 1.8%, with the volume of eggs for consumption (131 thousand tonnes) increasing by 1.6% and eggs for incubation (22 thousand tonnes) by 3.2% compared to 2022.

Total milk production was 1,996 million litres, corresponding to an increase of 1.4% compared to 2022, with the volume of cow's milk (1,901 million litres) increasing by 1.6% and sheep's and goat's milk decreasing by 2.6% and 4.9%, respectively.

The national dairy industry's production in 2023 resulted in a higher total volume of dairy products, due to the increase in fresh products (2.5% more drinking milk), since the total of processed products fell slightly, with cheese production falling by 4.8%, while butter and milk powder increased by 14.9% and 18.0%, respectively.

FOREST PRODUCTION

During 2023, 7,562 rural fires broke out in Portugal, 27.6% less occurrences than in 2022. The number of ignitions, is the lowest in the past 20 years, representing 80.8% of the average of the last five years (9,359).

In 2023, the burned area in Portugal corresponds to 34.5 thousand hectares on the mainland and 5.2 thousand hectares in the Madeira Autonomous Region (110.1 thousand hectares and 0.09 thousand hectares in 2022, respectively), which placed 2023 as the third least severe year in the last decade (2014-2023), with 68.6% of the average area burned during the last five years (57.8 thousand hectares).

In mainland Portugal, in 2023, the hunting area was distributed over 6,973 thousand hectares through 5,300 hunting areas, 52 more spaces spread over 23.7 thousand hectares less than in 2022.

The 112,285 hunting licenses issued in the 2022/2023 hunting season (115,726 in 2021/2022), justified a decrease of 3.0%, generating a revenue of 5.5 million euros, 2.8% lower than in 2021/2022.

THE 3RD LEAST SEVERE YEAR OF THE LAST DECADE: LESS BURNED AREA AND LOWER NUMBER OF IGNITIONS

AGRICULTURE AND THE ENVIRONMENT

APPARENT CONSUMPTION OF MINERAL FERTILIZERS RECOVERS WITH THE DECREASE (-24.8%) IN THE FERTILIZER PRICE INDEX

In 2022, 9.1 thousand tonnes of active substances of plant protection products were sold, reflecting a decrease of 5.7% compared to 2021. This decrease was due to a drop in sales of glyphosate (-22.0%), an active substance that accounted for 75% of total herbicide sales, representing 15.8% of total plant protection product sales.

Apparent consumption of fertilisers grew by 38.6% in 2023, largely due to the decrease in the price index for fertilisers and soil improvers (-24.8%).

In 2023, the gross nitrogen balance reached 154.8 thousand tonnes (133.5 thousand tonnes of nitrogen in 2022), the result of an increase in the incorporation of nitrogen into the soil (+25.1 thousand tonnes), which was more pronounced than the increase in nitrogen removed by crops (+3.8 thousand tonnes).

The phosphorus balance increased by 12.3% in 2023, accounting for a surplus of 1.2 thousand tonnes (+513 tonnes in 2022).

In 2022, agricultural activity was responsible for 50.6 Gg of NH_3 emissions, equivalent to 12.9 kg NH_3 /ha UAA. This result reflects a decrease of 2.6% compared to 2021, mainly due to the loss of importance of the emitting source "Application of inorganic fertilisers (includes urea)", which now accounts for 5.4% of total NH_3 emissions (-2.9 p.p.).

In 2022, agricultural activity was responsible for the emission of 6.9 million tonnes of GHG (eq. CO_2), which corresponds to 1.8 tonnes of GHG (eq. CO_2) /ha SAU (a reduction of 3.1% compared to 2021). Direct energy consumption from agricultural activity reached 16.4 million Gj in 2022, which represents a reduction of 7.0% compared to 2021, mainly due to the increase in oil and electricity prices, the main sources of energy used in the agricultural sector.

FOOD, BEVERAGE AND TOBACCO INDUSTRY - 2023

FOOD INDUSTRIES SALES INCREASE BY 1.3 BILLION EUROS AND REACH 17.0 BILLION EUROS ACTIVITY IN 2022

Manufacture of food products remained the main activity of national industrial production with 16.5% of total sales in 2023 (14.7% in 2022).

In 2023, 77.4% of the value of manufacture of food products sales was destinated to national market (-0.2 p.p. compared to 2022) and 16.9% to European Union (+0.1 p.p. compared to 2022).

The value of manufacture of food products sales in 2023 reached 17.0 billion Euros, more 1.3 billion Euros compared to 2022.

The “slaughtering of animals, processing and preserving of meat and meat products” activity was the most valued of the Manufacture of food products with 20.0% of total sales value (19.2% in 2022).

The manufacture of beverages accounted around 3.7 billion Euros of sales in 2023, more 166 million Euros than in 2022, while the “manufacture of wines” accounted for 49.5% of total sales (51.9 % in 2022).

Manufacture of tobacco products sales totalled 707.4 million Euros, 7 million more than in 2022.

INTERNATIONAL TRADE - 2023

The commercial deficit of agricultural and food products (excluding beverages and fishery products) reached EUR 5,512.7 million in 2023, which represents an increase of EUR 315.1 million compared to the previous year.

Meat and edible meat offal was the group that most contributed to this evolution, with an increase in the deficit of EUR 121.8 million in 2023, to EUR 1,362.0 million, also being the product group with the largest deficit in the agricultural and food products (excluding beverages and fishery products) group, surpassing the Cereals group.

The trade balance of Beverages, spirits and vinegars fell again, EUR -49.5 million compared to 2022, registering a surplus of EUR 650.4 million in 2023.

The trade balance of forest products reached EUR 2,923.7 million in 2023, down EUR 348.4 million on the previous year. Cork and Paper and paperboard recorded the highest surpluses (EUR 943.7 and EUR 940.2 million, respectively).

TRADE DEFICIT FOR "AGRICULTURAL AND AGRO-FOOD PRODUCTS" WORSE BY 315.1 MILLION EUROS AND REACHES 5.5 BILLION EUROS

SUPPLY BALANCES

In 2023 the domestic market contributed 75.4 %% of the amount of meat needed to meet national consumption needs, 2.7 p.p. less than the previous year. Poultry meat was the most consumed (47.2 kg/inhabitant, compared to 45.2 kg/inhabitant in 2022), followed by pig meat (41.7 kg/inhabitant compared to 42.4 kg/inhabitant in 2022).

Self-sufficiency for all dairy products (milk and dairy products) in 2023 was 94.6 %, compared to 93.7 % in 2022. Milk for public consumption (115.0%) and butter (133.3%) remained in surplus, but some dairy products remained in deficit, such as acidified milks (55.1%), milk-based drinks (74.2%) and cheese (59.3%).

POULTRY MEAT,

THE MOST CONSUMED IN 2023

47.2 kg/ inhabitant year

In the 2022/2023[1] campaign, self-sufficiency of cereals (except rice) was 18.0% (-1.7 p.p. compared to the previous campaign). Grain production fell by 8.9%, reflecting a cereal year marked by drought, with imports (+11.7%) allowing consumption to be similar to the one recorded in the previous campaign.

The total amount of fruit available for human consumption in 2022/2023 increased by 1.9%, equivalent to per capita consumption of 146.9 kg of fruit per inhabitant (144.9 kg in 2021/2022). The degree of self-sufficiency stood at 73.3 %, 14.7 p.p. less than in 2021/2022. It should also be noted that, compared to the previous campaign, exports fell by 14.0 % and fruit imports increased by 6.7 %.

The degree of olive oil self-sufficiency in 2022 was 198.6% (98.6 p.p. above self-sufficiency), 66.2 p.p. below the figure for 2021, a record year, which had the highest value in the entire available series.

In the 2022/2023 campaign, the degree of wine self-sufficiency stood at 108.9 % (112.4 % in 2021/2022). Wine production fell by 6.9% compared to the previous campaign, aggravated by the 20.2% reduction in imports, and human consumption fell by 9.2%, particularly regarding uncertified wines. There was also a significant drop in wine exports (-25.9%) in the period under review.

AGRICULTURAL PRICE STATISTICS - 2023

The agricultural goods output price index increased by 14.6%. This growth was due to the growths of 14.5% in the crop output price index and 14.7% in the animal output price index.

The price index of goods and services currently consumed in agriculture increased by 1.8% and the price index of goods and services contributing to agricultural investment grew by 4.7%.

AGRICULTURAL GOODS OUTPUT PRICE INDEX INCREASES BY 14.6%

[1] *The balance sheet for the 2022/23 campaign refers to cereal production in the 2021/22 agricultural year*

ECONOMIC ACCOUNTS FOR AGRICULTURE - 2023

INCOME FROM AGRICULTURAL ACTIVITY INCREASES BY 8.5%

In 2023, the Income from agricultural activity, in real terms, per work annual unit (AWU), registered an increase (+8.5%), as a result of the large increase in Gross Value Added (GVA), in nominal terms (+31.9%), and the strong reduction in Other subsidies on production (-46.1%).

The increase in GVA, in nominal terms, resulted from a growth in Agricultural Output (+16.7%) higher than that of Intermediate Consumption (IC) (+9.7%). In real terms, the smaller increase in GVA (+3.6%) reflected slighter increases in volume of Output and IC (+1.7% and +0.8%, respectively) and a large increase in implicit deflator.

ECONOMIC ACCOUNTS FOR FORESTRY - 2022

FORESTRY GVA VALUE INCREASES FOR THE SECOND CONSECUTIVE YEAR

In 2022, the GVA of forestry decreased by 3.4% in volume and increased, for the second consecutive year, in value (+9.6%).

The increase of GVA, in nominal terms, was a consequence of the increase in Output (+8.3%) which was higher than that in IC (+5.8%). It is worth noting the increases in the output of coniferous timber, non-coniferous timber and fuel wood (+6.9%, +19.9% and +17.3%, respectively), where the increase in prices had a major impact.