

AGRICULTURAL REPORT 2020 COMPACT



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An overview of 2019

This compact edition provides a concise overview of developments occurring in 2019 in selected thematic areas covered in more detail in the full Agricultural Report 2020.

The social dimension of agriculture – in particular, the question of disparities between farming families and society at large – is dealt with in the “People” section. This year’s edition focuses on the educational level of male and female farmers compared to other occupational groups. It is shown that the educational level completed by women in agriculture is lower than that of women in trade. By contrast, in the case of male farmers, the proportion with higher vocational training is greater than among male traders.

The economic dimension of agriculture is covered in the “Farm” section, which focuses in particular on agricultural incomes. The figures for 2019 show that, with an average of CHF 74,200 per farm, agricultural income was around 5% higher than in the previous year. The trend has been rising for several years.

The ecological dimension of agriculture is considered in the “Environment” section. In this edition, the topics of nitrogen and water are examined in more detail. Data from the national nitrogen balance confirms that, over the past three decades, the use of nitrogen in agriculture has decreased by 6%, while nitrogen outputs in plant and animal products have risen by over 20%. The balance also shows, however, that nitrogen losses have stagnated since 2000. Agricultural policymakers are aware that action is required in this area.

Also covered in this compact edition is the international dimension of agriculture. This year, attention is focused on how international trade relations can contribute to sustainable development. Here, it is apparent that Switzerland’s agricultural trade with the EU represents an important lever.

The impacts of the 2020 coronavirus crisis will be reviewed in the Agricultural Report 2021, but it can already be noted that certain markets experienced significant difficulties, particularly during the lockdown. Overall, however, the crisis has served to demonstrate not only the resilience of Swiss agriculture but also its importance in providing food supplies for the population.



1/3 of male farmers and 15 % of female farmers have higher vocational training

Educational level of male and female farmers

As shown by data from the annual Swiss Labour Force Survey, the educational level completed by women is generally less high than that completed by men. Among women in agriculture (female farmers), around a quarter, having completed compulsory education, do not subsequently undergo vocational training; in the case of female traders, the proportion is around 10%. In contrast, a third of male farmers have higher vocational training, while the proportion is somewhat lower (about a quarter) in the case of male traders.

■ Lower secondary level ■ Upper secondary level
■ Tertiary level



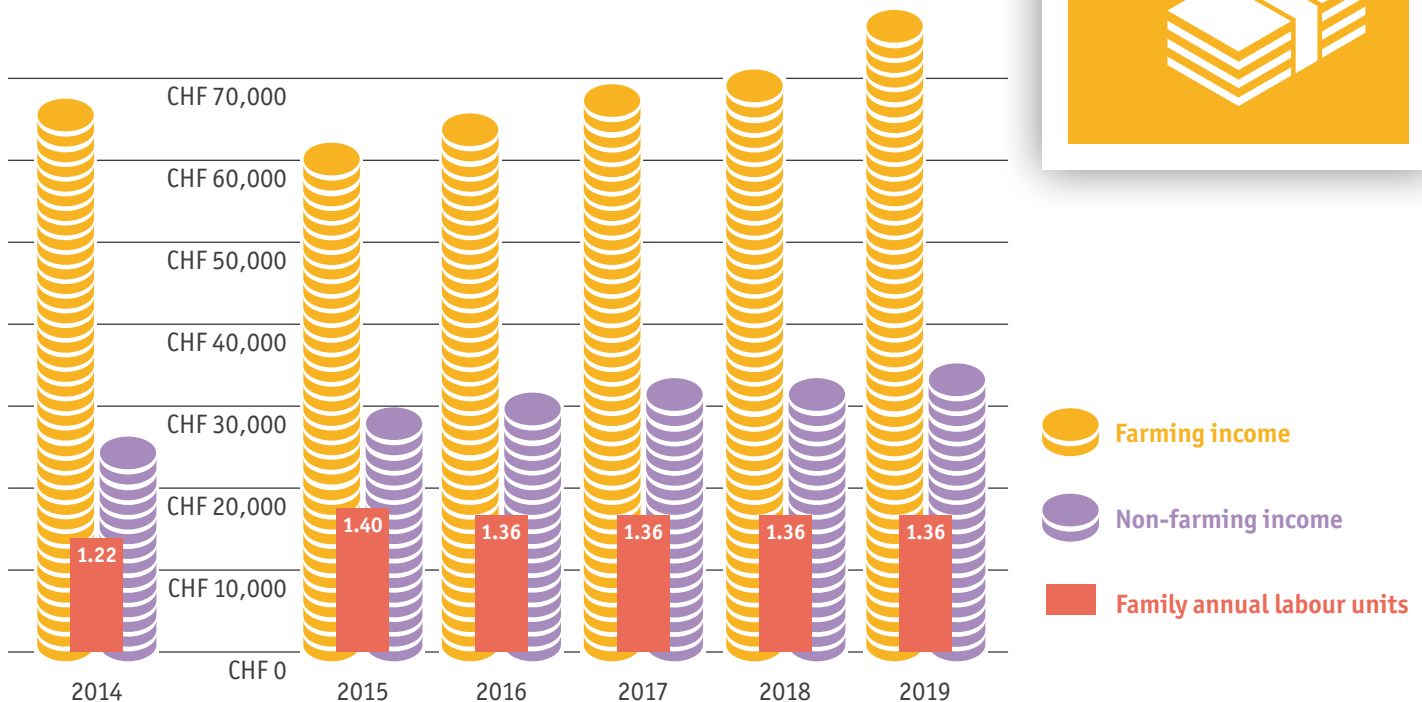
Cumulative annual data 2017–2019

Agricultural incomes

On average, according to the annual analysis of farm accountancy data, agricultural income in 2019 was around CHF 74,200 per farm, compensating 1.36 working members of the farming family. This amounts to CHF 3600 or 5% more than in the previous year. Agricultural incomes have been rising for some years now.

The findings on agricultural incomes in 2019 are based on a random sample of 2215 farms. In the analysis, the individual-farm data is weighted to provide as realistic as possible a picture of Swiss agricultural incomes.

**2019:
CHF 74,200
per farm**



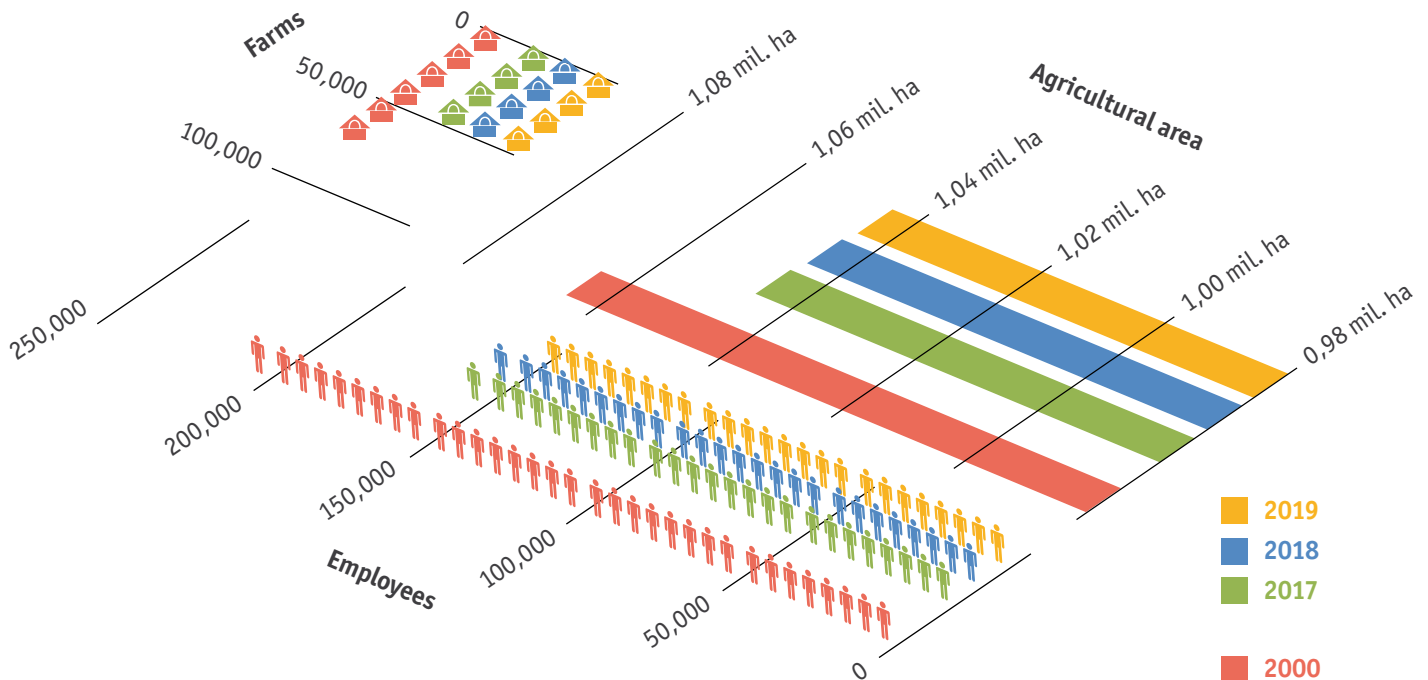


Structural change

In 2019, the total number of farms in Switzerland was around 50,000 – roughly 800 (or 1.6%) less than in the previous year. The total utilised agricultural area was 1,044,000 hectares. This corresponds to an average area of 20.9 hectares per farm, compared to 17.6 hectares per farm in 2009. Since 2000, the number of farms in Switzerland has decreased by 20,500 units, or 1.8% per year.

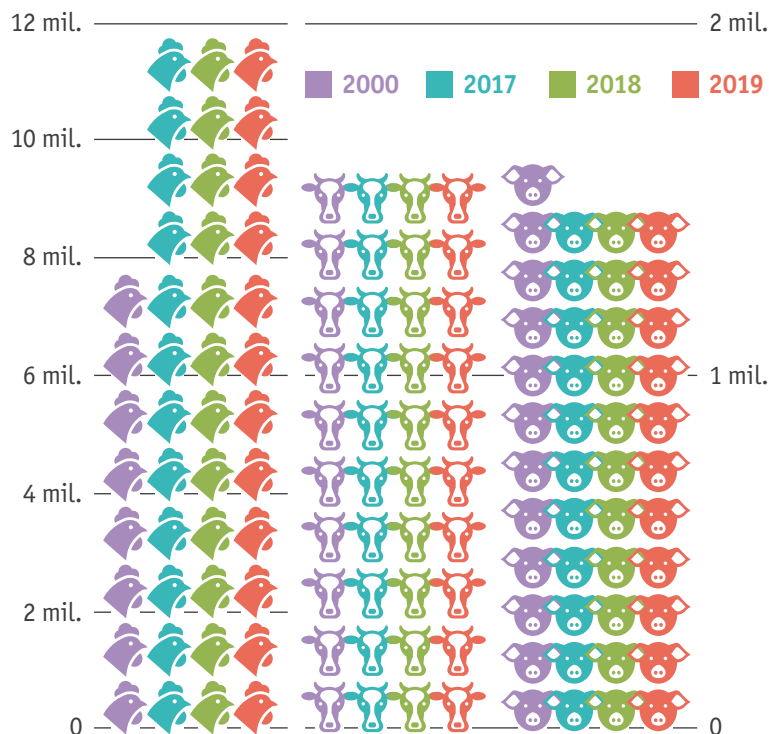
In 2019, around 150,100 people were employed in agriculture – 1.5% less than in the previous year. Since 2000, reflecting the decline in the number of farms, the agricultural workforce has also decreased – by around 53,700 people.

2019:
50,038 farms
150,133 employees
1,043,729 ha agricultural area





2000/02–2019: Livestock units of all animal species –4 %



Livestock farmers and livestock numbers

The number of livestock farmers in Switzerland has declined sharply over the past two decades – by 30% in the case of cattle farmers, by around 60% for pig farmers and 35% for chicken farmers. In 2019, 34,000 farms still kept cattle, around 5,800 kept pigs and over 13,300 kept chickens.

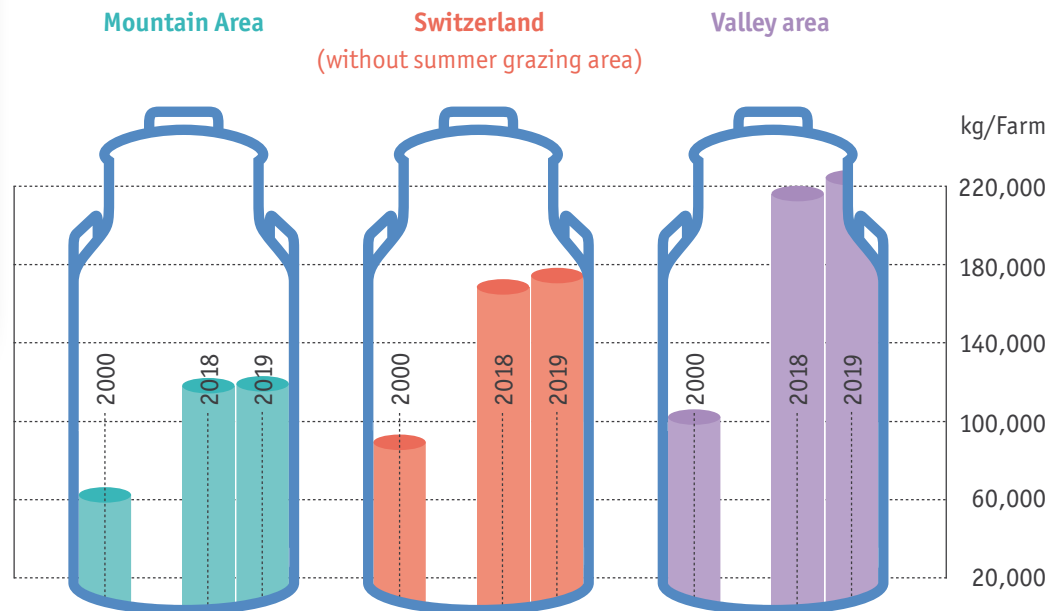
Declines can also be observed in livestock numbers, with the exception of poultry and goats. Overall, since 2000, the total number of livestock units has fallen by over 4%.

Milk production

Milk production is the most important sector of Swiss agriculture, accounting for around 20% of total agricultural production. In 2019, the total quantity of milk supplied was around 3.4 million tonnes – almost as much as in the previous year. Milk deliveries have been fairly stable for some years now.

In 2019, there were 19,075 milk producers in Switzerland, with 9,881 in lowland and 9,194 in mountain regions. On average, the quantity of milk supplied was around 222,000 kg per lowland farm and 118,300 kg per mountain farm. The number of milk producers has been declining for some years. Over the past ten years, as a result of greater concentration of production at a smaller number of farms, and thanks to advances in breeding and efficient feeding, productivity per farm and per cow has been increased in both lowland and mountain regions. Over this period, milk deliveries rose by 48% for lowland and 39% for mountain farms.

Productivity increased in recent years



Producer prices

In the dairy sector, 2019 saw a slight decrease in the quantity of raw milk supplied and a slight increase in farm gate milk prices. Compared to the previous year, the milk price paid to producers rose by 0.6 % to 64.24 centimes per kilogram.

In the slaughter animal market, prices continued to increase in 2019, especially for conventional production. For example, compared to 2018, the pig price rose by 60 centimes to CHF 4.35 per kilogram of carcass weight (CW). At the same time, however, due to increased supply, the price for organic pigs fell by 90 centimes to CHF 6.30 per kilogram of carcass weight. Also notable was the demand for domestic beef, which led to rising prices.

In crop production, 2019 saw generally stable prices, with minor variations. In the case of organic grain, prices fell slightly. Potato prices – both for conventional and for organic production

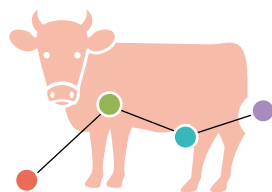


Producer prices: stable trends

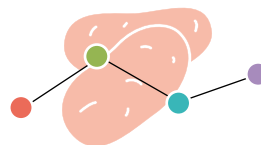
– were higher than in the previous year. For example, compared to 2018, Swiss (non-organic) early potatoes showed an increase of 6.2 % to CHF 86.10 per 100 kg. For almost all vegetables, prices were higher than in the previous year. Compared to 2018, the average price for lettuce, for example, rose by over 10 % to CHF 1.23 per unit.

- 2000
- 2017
- 2018
- 2019

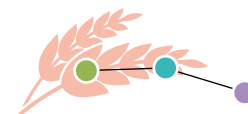
Breeding bull



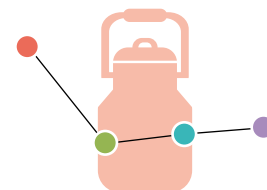
Early potatoes



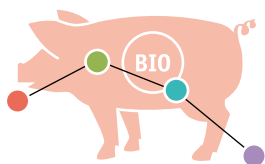
Organic milling wheat



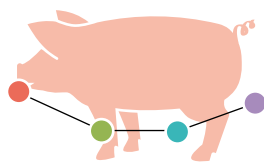
Milk



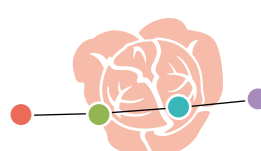
Organic slaughter pigs



Pig



Lettuce



Gross self-sufficiency rate 58 % in 2018

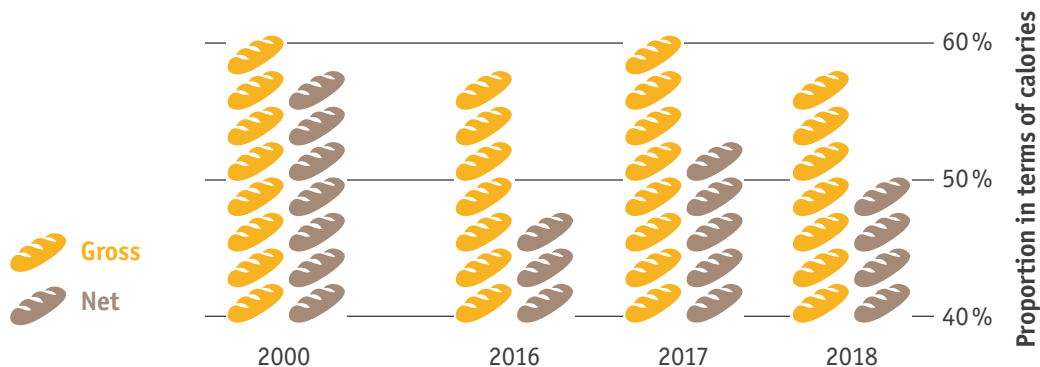


Self-sufficiency rate

The gross self-sufficiency rate for 2018 was 58 %, 1 % lower than the previous year. The decrease was attributable to lower domestic production of plant-based foods in particular. Viewed over the longer term, however, the gross self-sufficiency rate hovers around 60 %.

The net self-sufficiency rate for 2018 was 51 % – also 1 % lower than the previous year. This value has varied between 50 % and 55 % for some years now.

The self-sufficiency rate is defined as the ratio of domestic production to total domestic consumption. A distinction is made between gross and net self-sufficiency: the fact that some domestic production relies on imported animal feed is taken into account in determining the net self-sufficiency rate: domestic animal production is thus reduced by the proportion produced using imported feed.

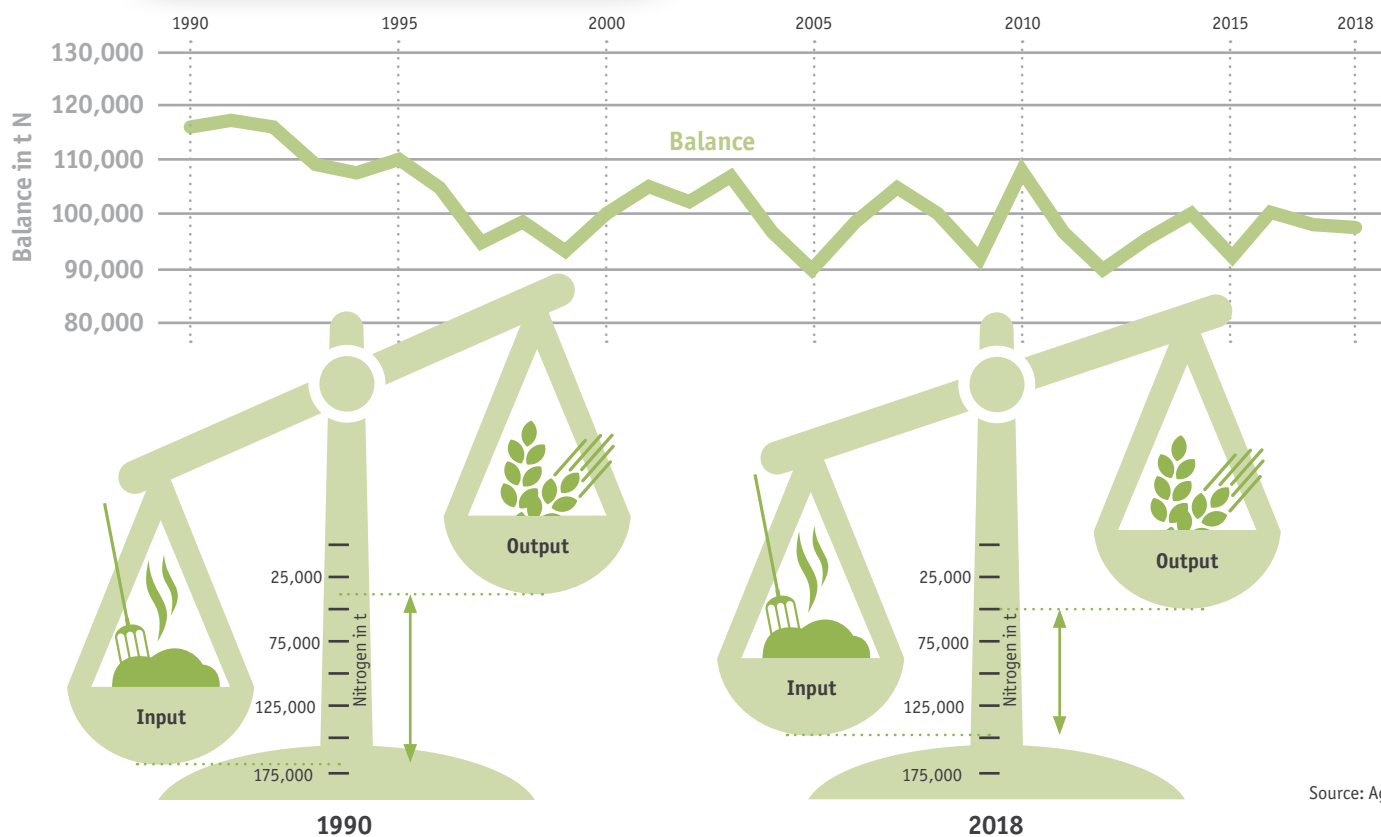




Nitrogen losses have stagnated since 2000

Nitrogen

According to the national nitrogen balance prepared by Agroscope, nitrogen inputs to agriculture decreased by 6% over the period 1990–2018, while nitrogen outputs in plant and animal products rose by over 20%. The balance also shows, however, that nitrogen losses have stagnated since 2000: action is required.



Water

The volume of herbicides sold and used in 2018 was about a quarter less than in 2009. Herbicides accounted for 584 tonnes of the total of 2,054 tonnes of active substances of plant protection products sold in Switzerland in 2018. The volume of herbicides applied per crop in 2018 was calculated with the aid of farm data: 26% was used in sugar beet, 18% in maize, 12% in winter wheat, 10% in oilseed rape, and 9% both in winter barley and in meadows.

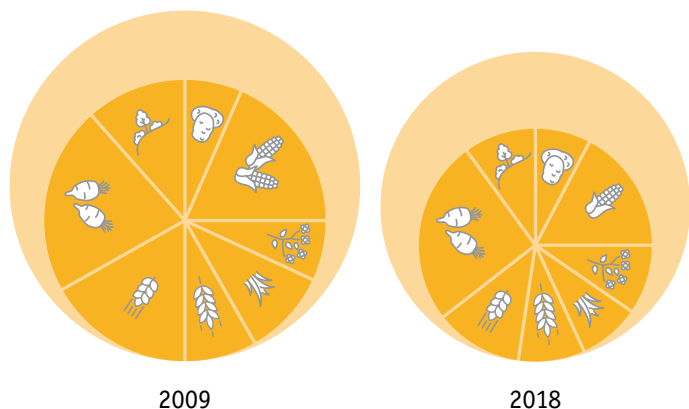
The risks for surface waters were analysed in an Agroscope study of plant protection products in Swiss field crops. It was shown that, between 2009 and 2018, the risk potential of herbicides was reduced by the imposition of restrictions on use. This trend is particularly evident in the case of the risks associated with the use of herbicides in winter barley.



The risks for surface waters were reduced thanks to restrictions on use

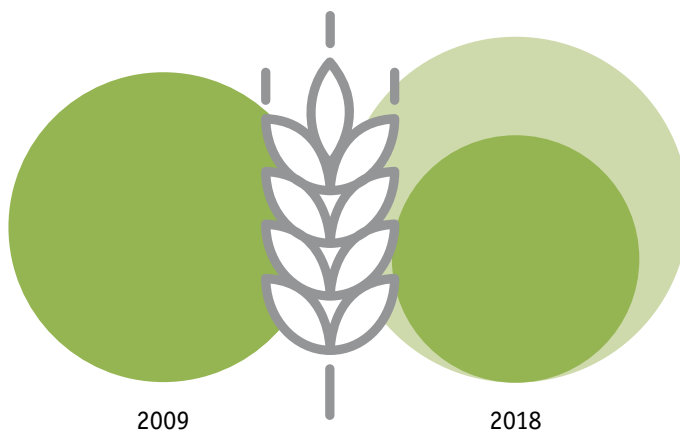
Herbicide use

● Sales ● Use



Risk potential winter barley

● without restrictions ● with restrictions



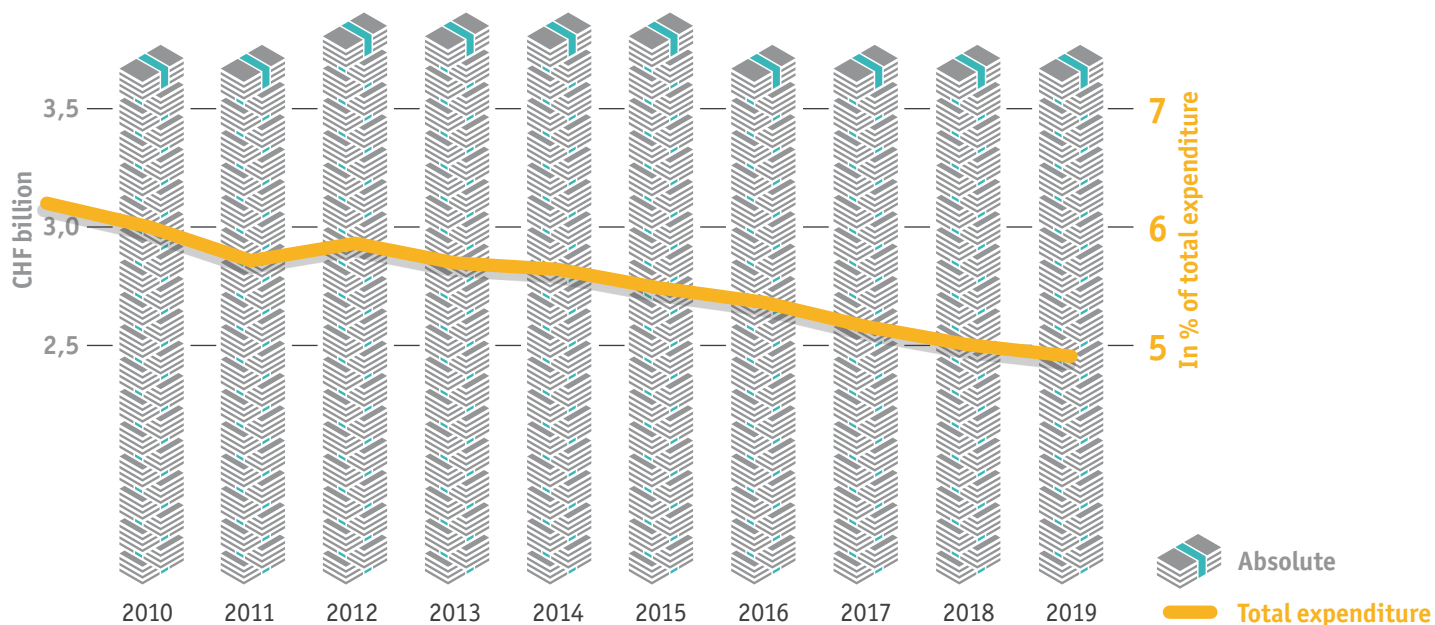


2019:
CHF 3.658 billion

Expenditure on agriculture and food

According to the accounts prepared by the Federal Finance Administration, federal expenditure on agriculture and food amounted to around CHF 3.7 billion in 2019. It thus ranks in sixth place behind expenditure on social welfare (CHF 22.4 bn), finances and taxes (CHF 10.1 bn), transport (CHF 9.9 bn), education and research (CHF 8.0 bn), and security (CHF 6.0 bn). Annual expenditure on agriculture and food has been in the region of CHF 3.6 bn for several years now.

Agriculture and food accounted for 5.1% of total federal expenditure in 2019. This proportion is declining from year to year.



Switzerland acts today for tomorrow

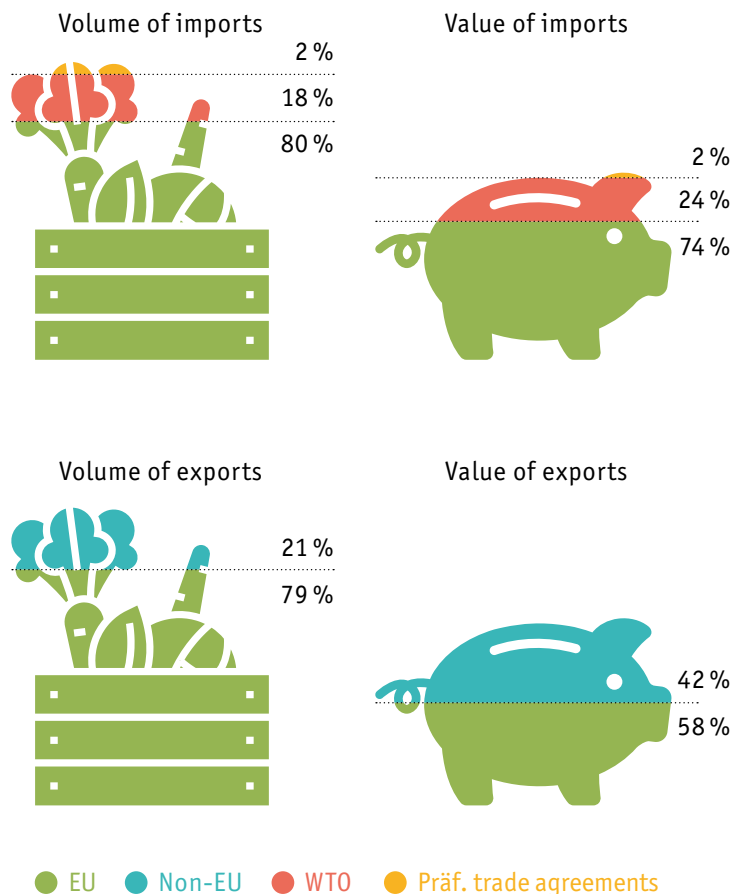


International trade relations contribute to sustainable development

Swiss foreign economic policy is based on (1) bilateral agreements with the European Union, (2) membership of the World Trade Organization and (3) preferential trade agreements with third countries. These three pillars enable Switzerland to promote sustainable development at home and abroad, thus contributing to the achievement of the goals defined in the Federal Constitution (Art. 104, 104a). Relations with the EU – Switzerland's biggest trading partner, accounting for 80% of agricultural trade – are of great importance for sustainable development. The multilateral WTO level – accounting for 18% of agricultural trade – represents another valuable lever in the area of trade policy and sustainable development. The impact of preferential trade agreements with third countries – accounting for just 2% of agricultural trade – is, however, limited.

As a prosperous country, Switzerland is in a position to play a pioneering role. Through its trade relations, it can actively influence sustainable development. This is dependent on fair, rules-based trade agreements and a coherent agricultural and trade policy.

Swiss agricultural trade 2015–2019 by country group





Agricultural Report 2020

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