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Analytical Brief N° 6

EXPLORE FARM INCOMES IN THE EU – Key developments in 2022

Farm economics overview based on 2022 FADN data

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Agriculture
and Rural
Development



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Highlights

This analytical brief presents the main results from the Farm Accountancy Data Network (FADN) data of the accounting year 2022. The FADN collects data annually from a sample of about 80 000 representative commercial farms in the EU. The data collected are used to assess the performance and challenges faced by farmers and EU agriculture and to advise policymakers. The various factors influencing the economic dynamics of farms can be thoroughly explored using the FADN data, available online at:

<https://agridata.ec.europa.eu/extensions/FarmEconomicsOverviewReport/FarmEconomicsOverviewReport.html>.

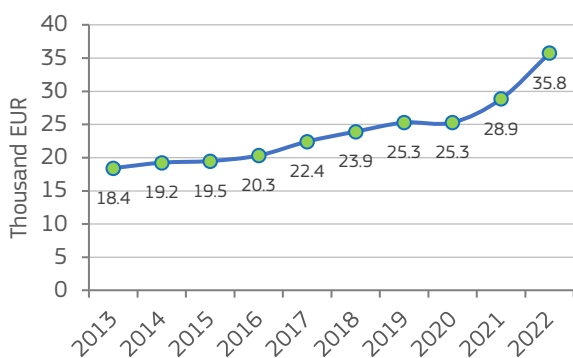
Farm income per worker has grown steadily over time

In 2022¹, the average farm income per worker in the EU, as reported by FADN, grew by 24% compared to 2021 and reached EUR 35 800, despite high input costs. Slovenia experienced the most significant change compared to 2021 (130%), followed by Luxembourg, Estonia and Lithuania (all above 50%). No Member State experienced a decrease. The lowest increase rate was observed in Italy (3%).

Graph 1 depicts a continuous increase in income over the 2013-2022 period, with the nominal EU farm income per worker up by 94%, far outpacing inflation over the same period (19.4%).

The upward trend in farm income per worker from 2013 to 2022 can be attributed on the one hand to the growth of the production value exceeding the growth of costs, leading to a higher total income per farm, and on the other hand to a gradual decrease in the number of farm workers.

GRAPH 1 – Income level trend since 2013, thousand EUR FNVA/AWU

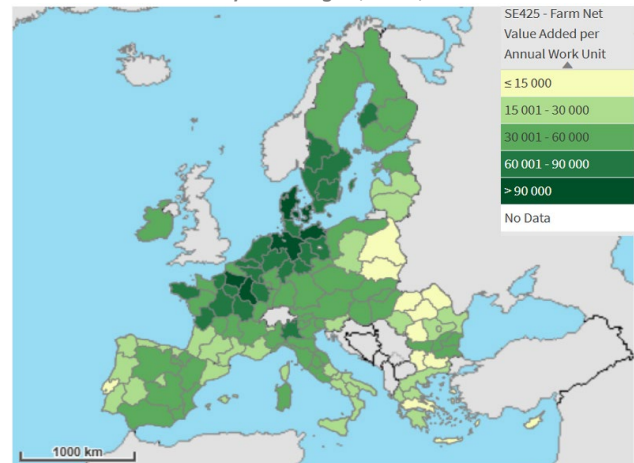


¹ Expressed in farm net value added per annual work unit (FNVA/AWU) in current prices. Data for 2022 do not include data for Malta and Croatia (currently unavailable). Data for the previous years refer to EU27. Farm net value added (FNVA) is equal to gross farm income minus depreciation costs. It is used to remunerate the fixed factors of production (labour, land and capital), whether they be external or family factors. As a result, agricultural holdings can be compared regardless of whether family or non-family factors of production used.

The highest farm incomes are found in the north-western regions of the EU

In 2022, the top 10% of farms with the higher income had almost EUR 75 000 per worker, while the bottom 10% struggled to break even (with EUR 1 000 per worker on average). Significant differences in income levels can be observed across EU countries, regions [MAP 1] and types of farming. The north-western part of the EU (Denmark, Northern Germany, the Netherlands and Northern France) boasted the highest incomes per worker, while the eastern part (Romania, Slovenia and Eastern Poland) recorded the lowest level.

MAP 1 – Income levels by FADN region, 2022, EUR FNVA/AWU



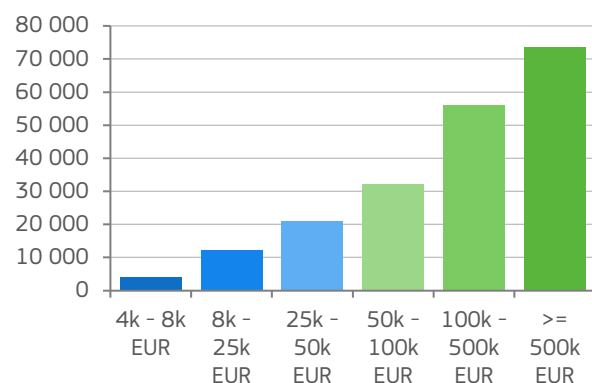
Income increased in all agricultural sectors

Compared to 2021, all agricultural sectors registered an increase in income per worker, with growth rates ranging from 1% for permanent crops other than wine to 47.6% for farms specialised in dairy. Farms specialised in pigs and poultry continue to have the highest income per worker (EUR 68 000 on average) whereas farms specialised in permanent crops other than wine had the lowest level (EUR 22 400).

Larger farms are more profitable

Irrespective of the sector, farm economic size plays a significant role when it comes to income: larger farms' higher costs per hectare are compensated by higher production value, resulting in greater overall profitability [Graph 2].

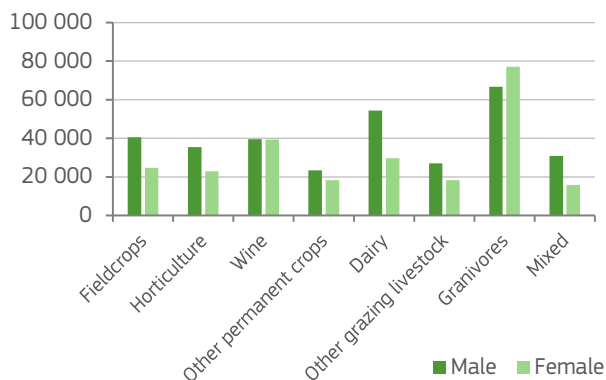
GRAPH 2 – Income levels by economic size of farms, 2022, EUR FNVA/AWU



Farms with the smallest economic size are concentrated in Poland and Romania, in fieldcrops and mixed farms whereas the biggest farms from an economic standpoint are mostly located in France and Germany, and are specialised in granivores.

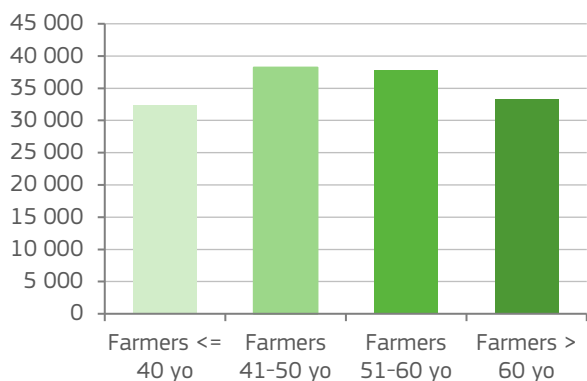
The income of farms run by women is more than one third lower than the income of farms run by men. However, it is slightly reducing over time. The gender gap concerns almost all Member States, sectors and size classes [Graph 3].

GRAPH 3 – Income by type of farm and by the gender of farmers, 2022, EUR FNVA/AWU



Farms run by middle-aged farmers (in the age class of 41-50-year-old) have on average the highest profitability [Graph 4]. Farmers in this age class are mostly found in Poland, Romania, Italy and Spain, and in field crop production. At EU level, the lowest income is registered by the youngest farmers. However, in most Member States, the lowest income levels are registered in farms run by the eldest managers. The discrepancy between the EU overall picture and the national results arises from the fact that most of the EU young farmers are in countries with below-average income levels (for example in Poland and Romania).

GRAPH 4 – Income levels by age of farmers, EU average, 2022

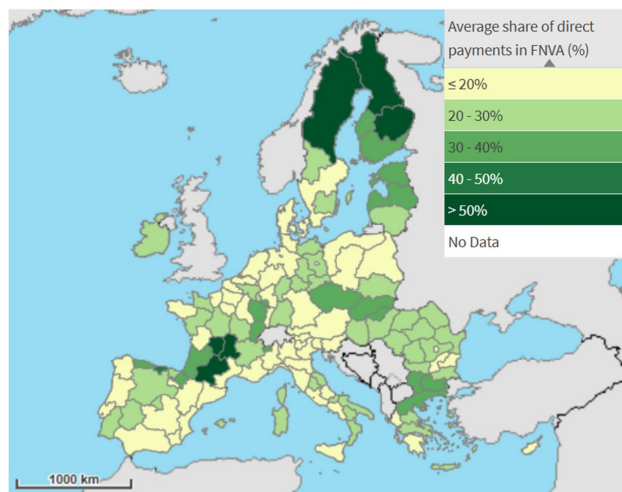


Education also plays a role in income levels, as farms run by managers with full or basic agricultural training have higher income per worker than farms whose managers have only practical agricultural experience. These trends are consistent across most Member States, farming types and size classes at EU level.

Direct payments support farms in smaller economic size classes more than proportionally

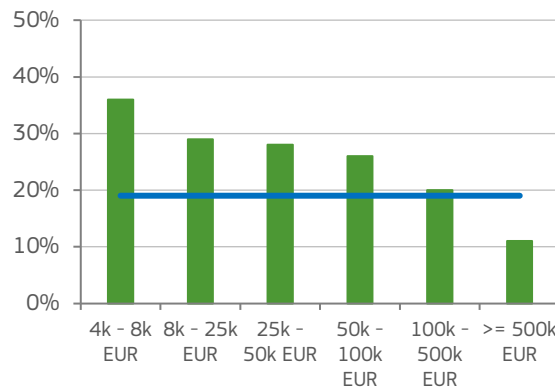
The Common Agricultural Policy provides income support through direct payments, and remunerates farmers for environmentally friendly farming and for delivering environmental services. In 2022, the average share of direct payments in FNVA² amounted to 19%. However, there are significant variations among the FADN regions, reflecting differences in both income levels and support levels (including national payments) [Map 2].

MAP 2 – Average share of direct payments in FNVA, 2022



The smaller the economic size, the higher the share of direct payments in FNVA [Graph 5].

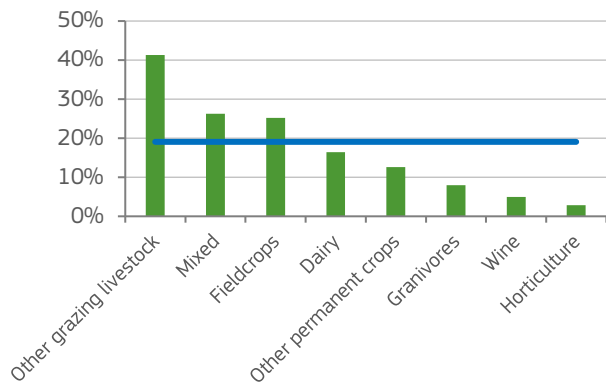
GRAPH 5 – Share of direct payments in FNVA (%), by economic size, 2022



² See footnote (1) for FNVA. Direct payments include both coupled and decoupled support and national payments.

The highest proportion was registered in the grazing livestock (other than dairy), with 41.3%. On the other side of the spectrum, farms specialised in horticulture have an average share of direct payments in FNVA of 2.8% [Graph 6].

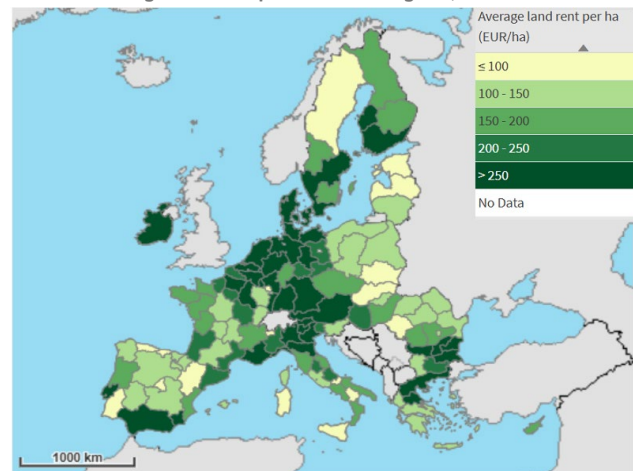
GRAPH 6 – Share of direct payments in FNVA (%), by type of farm, 2022



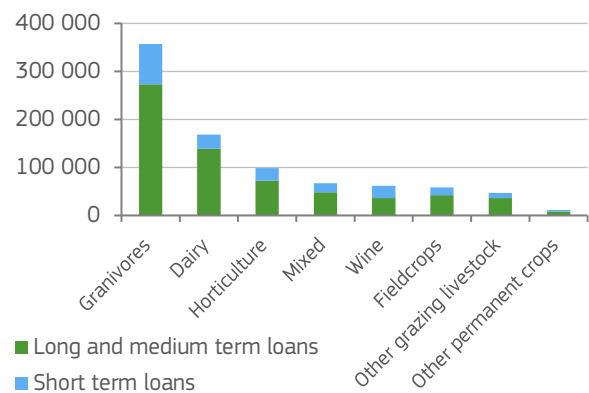
Farms vary a lot in terms of organisation and operation

Farms differ not only in terms of their types and sizes, but also in terms of the way they operate. Some rely on their own labour, while others on hired labour. Many farms make use of rented land and secure loans for investment and day-to-day operations [Map 3 and Graph 7].

MAP 3 – Average land rent price in FADN regions, 2022



GRAPH 7 – Farm loans by type of farm, 2022



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