SWOT Analysis PT-NL-BE-DE-FR

Young farmers and agricultural growth potential

Since 1986, Portugal has given priority to young farmers.
The land is available to be farmed by the new generation of European farmers.

23.2%	2.1 M ha	51.9%	€55,000
of Portugal is scrubland and bare land, against 5 to 8% in the other four countries	of land to be farmed and converted to agriculture	of Portuguese farmers are aged 65 or over	installation grant, plus 60% support for investment

Of the five countries, Portugal has, in proportion to its territory, the largest area to be farmed and converted to agriculture. Young farmers are the drivers of this conversion, and the Portuguese CAP opens its doors to them, whichever European Union country they come from.

KEY FINDINGS

1 **The largest area to farm and convert.** Scrubland and bare land cover 23.2% of Portugal, against 5 to 8% in the other four countries.

2 **Conversion with many uses.** Permanent crops, agroforestry, extensive livestock and conversion of dryland to irrigation; forest and mountain areas suited to agritourism.

3 **Young farmers drive the conversion.** With 51.9% of farmers aged 65 or over, generational renewal is decisive for the growth of Portuguese agriculture.

4 **Priority to young farmers since 1986.** A priority kept in every Portuguese CAP programme. Today, a grant of up to €55,000 and 60% support, for young people from across the EU.

THE 8 PARAMETERS COMPARED

1 **Land Use**
Farmland, forest, scrubland and artificial areas

2 **Land Not in Farming**
Scrubland and bare land: the growth potential

3 **Pressure on Land**
Population density and farm structure

4 **Weight of Agriculture in the Economy**
Agricultural value added and productivity per hectare

5 **Generational Renewal**
Age of farmers and room for renewal

6 **Land per Young Farmer**
Hectares of scrubland and bare land per farmer under 40

7 **CAP Support for Young Farmers**
Installation grant and investment support

8 **Open to Young Farmers from the Whole EU**
Access conditions to the Portuguese CAP for young Europeans

October 2026 | Prepared by Horticonsultancy Portugal

Introduction

This study compares Portugal (PT) with four countries in northern and central Western Europe: the Netherlands (NL), Belgium (BE), Germany (DE) and France (FR). It complements the SWOT Analysis PT-NL-BE-DE-FR of September 2026 and focuses on the land available to those who want to start farming, and on who will farm it.

The study is aimed at young European farmers, who drive the conversion of uncultivated land to agriculture. In their home countries, above all in northern Europe, access to land is the main obstacle to setting up a farm. In Portugal, the situation is the reverse.

Objectives

1. Measure, with comparable official data, the area of each country that is neither farmed nor forested.
2. Assess the age of farmers and the room for generational renewal in each country.
3. Relate the land available to young farmers and to the CAP support for setting up.

Sources and method

Land use data come from the Eurostat LUCAS 2022 survey; utilised agricultural area (UAA) and the number of farms from the 2020 agricultural census; the age of farm managers from the 2023 farm survey; agricultural value added from the 2024 national accounts; and population density from 2024. The conditions of the Portuguese CAP (PEPAC, the CAP Strategic Plan 2023-2027) follow Ordinance 303-A/2024/1. For France, metropolitan territory is used. Average age is estimated from the age classes published by Eurostat.

Key findings

Scrubland and bare land cover 23.2% of Portugal, around 2.1 million hectares, against 5 to 8% in the other four countries. This area, largely the result of former cropland and pasture being abandoned, is an opportunity for conversion to farming that the other four countries do not have, whether for permanent crops, agroforestry and extensive livestock, or for converting dryland to irrigation by tapping groundwater, an investment that is eligible and co-financed by the Portuguese CAP. Forest and mountain areas, rich in biodiversity, are well suited to agritourism and to activities such as canoeing, rafting and mountaineering, which are also eligible under the Portuguese CAP. At the same time, Portugal has the oldest farming population of the five, with 51.9% of managers aged 65 or over and only 4.9% under 40. In proportion to its territory, Portugal is the country with the largest area to farm and convert to agriculture, and the one that most needs a new generation of farmers to do it. Young farmers drive this conversion, because they are the ones who, above all, turn uncultivated land into new farms. Generational renewal is therefore decisive for the growth of Portuguese agriculture.

Since joining what was then the EEC in 1986, Portugal has given priority to setting up young farmers, and today's Portuguese CAP is open to young people from across the European Union.

> **Open to all young farmers in the EU.** The Portuguese CAP does not require Portuguese nationality. Young people from any Member State can apply, provided they set up on a farm in mainland Portugal, either as a sole trader or through a company registered in Portugal (see Take 10).

1 Parameter 1 Land Use

How the territory is divided between the main land cover classes, and the share of utilised agricultural area (UAA).

Parameter	Portugal	Netherlands	Belgium	Germany	France
Total area (km²)	**92,226**	37,391	30,667	357,569	549,060
UAA 2020 (ha)	**3,963,940**	1,817,900	1,368,120	16,595,020	27,364,630
UAA (% of territory)	**43.0%**	48.6%	44.6%	46.4%	49.8%
Cropland	**16.2%**	21.7%	25.3%	27.4%	27.3%
Grassland and meadows	**17.1%**	33.4%	29.3%	21.6%	23.8%
Forest	**35.3%**	14.3%	26.2%	34.2%	33.7%
Scrubland	**17.8%**	1.8%	1.0%	1.1%	2.9%
Bare land	**5.4%**	4.0%	4.2%	5.7%	5.2%
Artificial areas	**6.3%**	13.0%	12.0%	7.8%	5.6%
Water and wetlands	**1.8%**	11.9%	1.9%	2.3%	1.5%

Sources: Eurostat, LUCAS 2022 survey (lan_lcv_ovw), percentages of total area; 2020 agricultural census (ef_lus_main); total area (reg_area3). France: metropolitan territory (outermost regions of 89,415 km² excluded).

Portugal has the lowest share of UAA of the five countries. The big difference lies in scrubland, which covers 17.8% of Portugal and only 1 to 3% of the other four. Much of this scrubland is former cropland and pasture in the interior of the country, abandoned over recent decades.

Forest covers 35.3% of the territory. In forest and mountain areas, with high biodiversity, rivers and unspoilt landscapes, the main potential lies in agritourism and nature tourism, combining rural accommodation with activities such as canoeing, rafting, mountaineering and wildlife watching. These investments are also eligible for co-financing under the Portuguese CAP.

Atlantic Agriculture

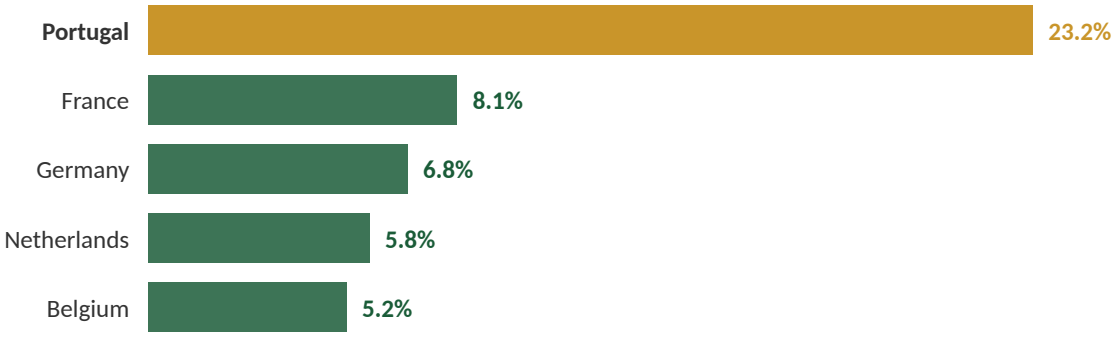
The whole Portuguese coastline faces the Atlantic. This ocean influence gives Portugal an Atlantic Agriculture, with mild winters, moderate summers along the coast and 2,700 to 2,800 hours of sunshine a year, which sets it apart from Mediterranean producers such as Spain, Italy and Greece.

> **PORTUGAL'S ADVANTAGE** **The lowest share of farmland of the five (43.0%) and 17.8% of the territory under scrubland, 6 to 18 times more than in the Netherlands, Belgium, Germany and France: the largest area in the group to be farmed and converted to agriculture.**

2 Parameter 2 Land Not in Farming: the Growth Potential

Scrubland and bare land as % of territory

LUCAS 2022



Parameter	Portugal	Netherlands	Belgium	Germany	France
Scrubland and bare land (% of territory)	**23.2%**	5.8%	5.2%	6.8%	8.1%
Scrubland and bare land (ha)	**2,139,600**	216,900	159,500	2,431,500	4,447,400
Territory outside UAA and forest	**21.7%**	37.1%	29.2%	19.4%	16.5%
Net potential (excluding UAA, forest, artificial areas and water)	**13.6%**	12.2%	15.3%	9.3%	9.4%

Sources: Eurostat, LUCAS 2022 (lan_lcv_ovw), 2020 agricultural census (ef_lus_main), total area (reg_area3). Calculations by Horticonsultancy Portugal.

The simple calculation (territory minus UAA and forest) puts the Netherlands and Belgium ahead, because of their cities, infrastructure and water. Once these areas are deducted, Portugal's net potential is 13.6%, around 1.25 million hectares, and even this figure is an underestimate, because montado and grazing land under tree cover count as both UAA and forest and are therefore deducted twice.

The most robust indicator is the area of scrubland and bare land, measured with the same source in every country. Where slope or soil rule out cultivation, the same land can support extensive livestock, agroforestry and agritourism. None of the other four countries has a comparable area.

Much of this dryland can be converted to irrigation by tapping groundwater through boreholes and efficient irrigation systems, subject to an abstraction licence. These investments are eligible under the Portuguese CAP, with support rates for young farmers of 60% in existing irrigated areas and 50% in newly irrigated areas.

> **PORTUGAL'S ADVANTAGE** **23.2% of the territory, around 2.1 million hectares, is scrubland or bare land, in proportion 3 to 4.5 times more than in the other four countries. Land available for permanent crops, new irrigated areas, agroforestry, extensive livestock and agritourism.**

3 Parameter 3 Pressure on Land

Population density and farm structure. The higher the density, the greater the competition between urban, industrial and agricultural uses of land.

Parameter	Portugal	Netherlands	Belgium	Germany	France
Population density 2024 (inhabitants/km²)	**117.6**	529.5	389.1	236.4	108.5
Number of farms 2020	**290,230**	52,640	36,000	262,780	393,030
Average farm size (ha of UAA)	**13.7**	34.5	38.0	63.2	69.6
Artificial areas (% of territory)	**6.3%**	13.0%	12.0%	7.8%	5.6%

Sources: Eurostat, population density (tps00003, 2024; France: provisional figure for the whole country); 2020 agricultural census (ef_lus_main); LUCAS 2022 (lan_lcv_ovw).

The Netherlands and Belgium are among the most densely populated countries in the European Union, with cities, ports and infrastructure competing for every hectare. Portugal's density is close to that of France and far below that of Benelux and Germany, especially in the interior, where most of the scrubland lies.

Portuguese farms are small, with 13.7 hectares on average, against 34 to 70 in the other countries. This is a structural weakness, but also an opportunity, because the succession of tens of thousands of farms (Parameter 5) makes it possible to group land into holdings of a modern size.

> **PORTUGAL'S ADVANTAGE** **Population density 4.5 times lower than in the Netherlands and 3.3 times lower than in Belgium, which means less competition for land and more room to convert land to agriculture and create farms of a competitive size.**

4 Parameter 4 Weight of Agriculture in the Economy

Gross value added (GVA) of agriculture, forestry and fishing, as a percentage of total GVA, in absolute terms and per hectare of UAA.

Parameter	Portugal	Netherlands	Belgium	Germany	France
Agricultural GVA 2024 (% of total GVA)	**2.29%**	1.96%	0.94%	0.97%	1.41%
Agricultural GVA 2024 (€ million)	**5,812**	19,553	5,285	38,624	37,067
Agricultural GVA per ha of UAA (€)	**1,466**	10,756	3,863	2,327	1,355
Agriculture as % of GDP 2024 (World Bank)	**2.02%**	1.73%	0.79%	0.91%	1.30%

Sources: Eurostat, national accounts (nama_10_a10), current prices, 2024; World Bank (NV.AGR.TOTL.ZS). GVA per hectare is indicative: it divides the sector's GVA by the 2020 UAA. EU average: 1.77% of GVA.

Agriculture carries more weight in the Portuguese economy than in any of the other four countries, and above the European average. It is a relevant sector, with political and institutional weight, in which public support has continuity.

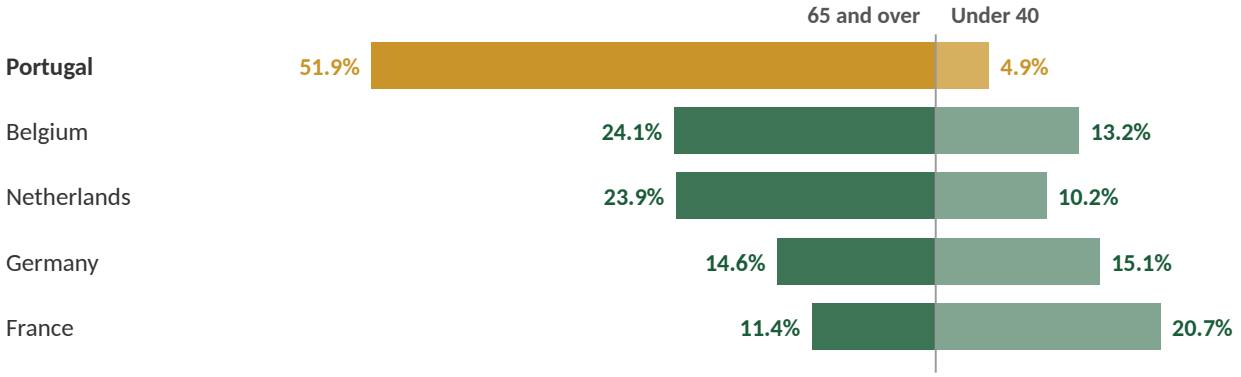
The value generated per hectare shows the room for growth. Each hectare of Portuguese UAA produces around €1,470 of GVA, against €2,327 in Germany, €3,863 in Belgium and €10,756 in the Netherlands. The difference is explained mainly by the level of mechanisation, technology and production methods, such as precision farming, drip irrigation and fertigation, greenhouses and tunnels, improved varieties and digital farm management.

If Portugal reached Germany's value per hectare, agricultural GVA would rise by around 59%, an extra €3.4 billion a year; at Belgium's level, it would be 2.6 times higher. The investments in equipment, technology and irrigation behind this leap are the ones the Portuguese CAP supports at 60% for young farmers.

PORTUGAL'S ADVANTAGE **The greatest weight of agriculture in the economy of the five countries (2.29% of GVA) and huge room for growth in income per hectare. With mechanisation, technology and modern production methods, each hectare can generate several times its current value, and every hectare of scrubland converted adds to this potential.**

5 Parameter 5 Generational Renewal: Age of Farmers

Farm managers by age, 2023



Parameter	Portugal	Netherlands	Belgium	Germany	France
Estimated average age (years)	62.7	56.6	55.8	53.6	51.3
Managers under 40	4.9%	10.2%	13.2%	15.1%	20.7%
Managers aged 40 to 64	43.2%	65.9%	62.7%	70.3%	67.9%
Managers aged 65 and over	51.9%	23.9%	24.1%	14.6%	11.4%
Managers under 40 for every 100 aged 65 and over	9.5	42.8	54.9	103.4	182.0
Farms with a manager aged 65+	135,710	12,060	8,240	37,210	41,030

Source: Eurostat, farms by age of manager (ef_fsi_agesex), 2023. EU average: 10.7% under 40 and 34.9% aged 65 and over. Average age is estimated from the midpoint of each age class (72 years for the 65 and over class).

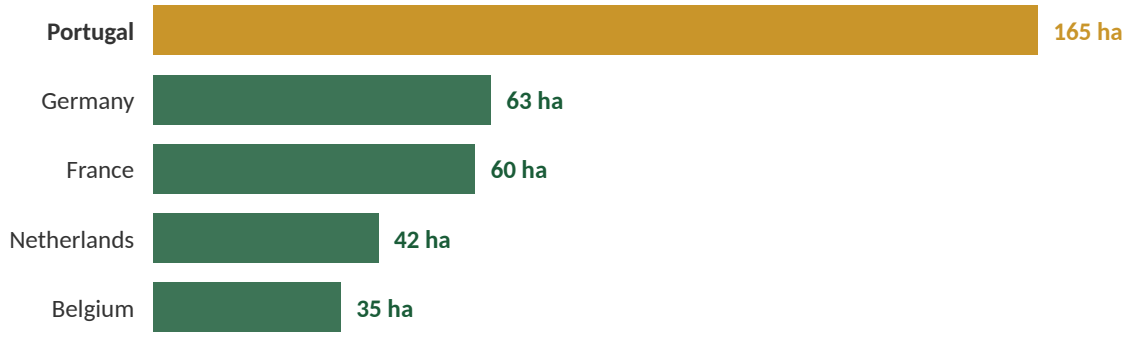
Portugal has the oldest farming population of the five and one of the oldest in the European Union. For every 100 farmers aged 65 or over there are fewer than 10 under 40. In France, by contrast, young farmers outnumber those aged 65 or over by almost two to one (20.7% against 11.4%).

THE OPPORTUNITY IN PORTUGAL **The greatest room for generational renewal of the five countries. There are 135,710 farms, more than half of the total, run by farmers aged 65 or over, which will change hands in the next 10 to 15 years, in the country with the largest area to farm and convert of the five.**

6 Parameter 6 Land Available per Young Farmer

Hectares of scrubland and bare land per farmer under 40

2022-2023



Parameter	Portugal	Netherlands	Belgium	Germany	France
Scrubland and bare land (ha)	2,139,600	216,900	159,500	2,431,500	4,447,400
Managers under 40	12,930	5,160	4,520	38,480	74,680
Hectares per young farmer	165	42	35	63	60

Calculation by Horticonsultancy Portugal with Eurostat data: LUCAS 2022 (lan_lcv_ovw), total area (reg_area3) and managers by age (ef_fsi_agesex, 2023).

Why young farmers are best placed

1. **Today's farmers will not take up this land.** More than half are aged 65 or over and are leaving farming, not expanding.
2. **Converting scrubland to farming is a long-term project.** Soil preparation, water, permanent crops, agroforestry or extensive livestock take years to pay back and fit a career that is just beginning.
3. **The support is designed for them.** The Portuguese CAP reserves the installation grant and the highest investment support rates for young people aged 18 to 40 (Parameter 7).
4. **They bring training and technology.** Precision farming, efficient irrigation and soil management make land that is marginal today profitable. In the Netherlands, 72% of young farmers have full agricultural training.

PORTUGAL'S ADVANTAGE **None of the other four countries has so much land available per young farmer. Portugal has territory waiting for a new generation willing to clear it, farm it and add value to it.**

7 Parameter 7 Portuguese CAP Support for Young Farmers

Since joining what was then the EEC in 1986, every agricultural programme applied in Portugal has given priority to setting up young farmers, from Regulation (EEC) No 797/85 and PEDAP, through the Community Support Framework programmes (PAMAF, AGRO and RURIS), PRODER (2007-2013) and PDR2020 (2014-2022), to today's Portuguese CAP, PEPAC (2023-2027). This continuity now takes on a new reach. With 51.9% of farmers aged 65 or over, the next generation finds land and farms available in Portugal as in none of the other four countries.

Portuguese CAP conditions for young farmers (mainland Portugal)

Support	Condition
Installation grant	€25,000 base, plus €25,000 for full-time farming and €5,000 in a vulnerable territory: **up to €55,000 per young farmer**
Investment support	**60%** of eligible investment up to €500,000; 50% between €500,000 and €2 million
Irrigation	Groundwater abstraction (boreholes), irrigation networks and efficient systems: 60% in existing irrigated areas and 50% in newly irrigated areas
Type of support	Non-repayable grant: not a loan and not paid back, provided the business plan is fulfilled
Business plan	5 years, with a minimum investment of €25,000 per young farmer
Grant payment	80% after the application is accepted and 20% after the business plan is verified

Source: Ordinance 303-A/2024/1 of 26 November (PEPAC measures C.2.2.1 and C.2.2.2), articles 8 to 10 and Annex II.

Top-up for young farmers in the five countries

Parameter	Portugal	Netherlands	Belgium	Germany	France
Young farmer top-up	**+10 p.p. and installation grant of up to €55,000**	Own scheme; one of the smallest CAP budgets in the EU	+10 p.p. in the 30-40% categories	+10 p.p. (capped at €20,000)	+10 p.p. and installation grant (DJA)

Source: SWOT Analysis PT-NL-BE-DE-FR, Horticonsultancy Portugal, September 2026 (Parameter 1).

PORTUGAL'S ADVANTAGE **Up to €55,000 installation grant and 60% investment support, non-repayable, for young people aged 18 to 40 who want to farm and convert land to agriculture. Forty years of political priority for young farmers, with continuity assured in the Portuguese CAP.**

8 Parameter 8 Open to Young Farmers from the Whole EU

The Portuguese CAP does not require Portuguese nationality. The requirements concern the person, the farm and the project, not where the applicant comes from.

Requirement	Portuguese CAP: installation grant and investment support
Nationality	**Not required.** Open to young people from any country
How to apply	As a sole trader, or through a private limited company registered in Portugal whose managing partners are all young farmers and hold the majority of the capital
Registration	Agricultural activity registered with the Portuguese Tax Authority less than two years before
Location	Farm located in mainland Portugal
Age and setting up	Aged 18 to 40; first time setting up as head of a farm
Training	A basic agricultural training course for young farmers, a vocational or technical course in agriculture, or a higher education degree in agricultural, forestry or animal sciences is enough. Those without training can complete it after approval: 50 hours of initial training and at least 100 further hours, started within the following 12 months

Source: Ordinance 303-A/2024/1, articles 3 to 6. Horticonsultancy Portugal confirms the eligibility of each case before the application.

In northern Europe, young farmers face the opposite problem. In a European Commission survey of more than 2,200 young farmers, 61% named the lack of land to buy as the greatest obstacle to setting up, and 57% the lack of land to rent. Portugal has the land they lack, and a programme that accepts them on the same terms as young Portuguese farmers.

Source: European Commission, DG AGRI, study on the needs of young farmers (Ecorys, Wageningen UR and Aequator, 2016).

PORTUGAL'S ADVANTAGE **Any young farmer from the European Union can apply to the Portuguese CAP. All it takes is to set up on a farm in Portugal, as a sole trader or through a company registered in Portugal, and make use of the largest area to farm and convert to agriculture of the five countries.**

Consolidated SWOT Matrix: the Five Countries

Summary of the parameters

Parameter	Best-placed country	Portugal's position
1 Land Use	Portugal (lowest UAA, 17.8% scrubland)	1st of 5
2 Land Not in Farming	Portugal (23.2% scrubland and bare land)	1st of 5
3 Pressure on Land	France (108.5 inhabitants/km²)	2nd of 5 (117.6 inhabitants/km²)
4 Weight in the Economy	Portugal (2.29% of GVA)	1st of 5
5 Generational Renewal	Portugal (greatest room: 51.9% aged 65+)	Greatest succession opportunity
6 Land per Young Farmer	Portugal (most land per young farmer)	1st of 5
7 CAP Support for Young Farmers	Portugal (up to €55,000 and 60%)	1st of 5
8 Open to the Whole EU	Portugal (land and CAP open)	Open to young people from the whole EU

SWOT matrix of the five countries

	Portugal	Netherlands	Belgium	Germany	France
Strengths	**Lowest UAA (43.0%); 23.2% scrubland and bare land; greatest weight of agriculture (2.29% of GVA); Atlantic Agriculture; low density; grant of up to €55,000 and 60% investment support**	€10,756 of GVA per ha; 72% of young farmers fully trained	13.2% of managers under 40; VLIF support of up to 50% for young farmers	Farms of 63.2 ha; 15.1% of managers under 40	20.7% of managers under 40; average age of 51.3; DJA grant
Weaknesses	**Small farms (13.7 ha); GVA of €1,466 per ha; average age of 62.7**	529.5 inhabitants/km²; 5.8% scrubland and bare land; 42 ha per young farmer	35 ha per young farmer, the lowest; 0.94% of GVA; 389.1 inhabitants/km²	0.97% of GVA; 6.8% scrubland and bare land; young farmer top-up capped at €20,000	GVA of €1,355 per ha; regional support with low caps
Opportunities	**135,710 farms will change hands; the largest area to convert to agriculture; CAP open to young people from the whole EU; dryland to irrigation; agritourism in forest and mountain areas**	Qualified young farmers with know-how to apply where land is available	Innovation support in Flanders	Largest consumer market in the EU	8.1% scrubland and bare land; large domestic market
Threats	**Climate change; fragmented ownership and incomplete land registry; labour in the interior**	Lack of land; nitrogen restrictions	Urban pressure; 24.1% of managers aged 65+	High costs; little land for new farmers	Recent heatwaves; competition for land

Summary of Parameters 1 to 8. Sources are given in each parameter.

SWOT Matrix: Netherlands, Belgium, Germany and France

Netherlands

Category	Assessment
Strengths	The most productive agriculture of the five (€10,756 of GVA per hectare); 72% of young farmers with full agricultural training; a highly capitalised and technologically advanced sector.
Weaknesses	Density of 529.5 inhabitants/km², the highest of the five; only 5.8% of the territory under scrubland and bare land; 42 ha per young farmer; 23.9% of managers aged 65 or over.
Opportunities	Highly qualified young farmers, able to take knowledge and technology to regions with land available.
Threats	Lack of land for new farmers; nitrogen and land use restrictions limit expansion.

Belgium

Category	Assessment
Strengths	13.2% of managers under 40; €3,863 of GVA per hectare; VLIF support of up to 50% for young farmers in sustainability investments.
Weaknesses	Only 5.2% of the territory under scrubland and bare land; 35 ha per young farmer, the lowest of the five; agriculture at 0.94% of GVA; density of 389.1 inhabitants/km².
Opportunities	Innovation support for pioneering investments in Flanders.
Threats	Strong urban pressure on farmland; 24.1% of managers aged 65 or over and little land for new farmers.

Germany

Category	Assessment
Strengths	Large farms (63.2 ha on average); 15.1% of managers under 40; estimated average age of 53.6.
Weaknesses	Agriculture at 0.97% of GVA; 6.8% of the territory under scrubland and bare land; density of 236.4 inhabitants/km²; young farmer top-up capped at €20,000.
Opportunities	The largest consumer market in the EU, with strong demand for fresh fruit and vegetables grown in southern Europe.
Threats	High production costs and a shortage of farm labour; little land available for new farmers.

France

Category	Assessment
Strengths	The best generational renewal of the five (20.7% under 40; estimated average age of 51.3); farms of 69.6 ha; installation grant (DJA).
Weaknesses	Low value generated per hectare (€1,355); regional investment support with low caps.
Opportunities	8.1% of the territory under scrubland and bare land, the second highest of the five; large domestic market with growing demand for fresh fruit and vegetables.
Threats	Recent heatwaves reduced output; competition for land between young farmers and expanding farms.

The Challenge to Young European Farmers

You have agricultural training. Now you need the land.

In the Netherlands, Belgium and Germany, free land is scarce. Scrubland and bare land cover 5 to 7% of the territory, and six in ten young European farmers say that lack of land is their biggest obstacle.

Portugal is the opposite. It has 2.1 million hectares of scrubland and bare land, 23% of the country, and only 12,930 farmers under 40. It is the largest area to farm and convert to agriculture of the five countries. Half of Portugal's farmers are aged 65 or over.

Portugal needs people to farm this land and supports those who do, with up to €55,000 as an installation grant and 60% investment support, non-repayable. A basic, vocational or higher agricultural course meets the training requirement, and your nationality is no barrier.

Atlantic Agriculture, more sun, more land and a longer growing season. The challenge is set. Come and farm in Portugal.

How we support young farmers

Horticonsultancy Portugal, based in Óbidos, supports young farmers from all over Europe at every stage of setting up in Portugal, from choosing the region, the land and the production model to forming the company, registering the activity, applying for the Portuguese CAP installation grant and investment support, and carrying out the business plan. Our founder, an agronomist (M.Sc.), leads a team covering the legal, technical and financial sides, so that the young farmer has a single point of contact from the first site visit to the approval of funding.

Contact us for a first free consultation
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