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publication for Scotland

December 2019 Agricultural Survey

17 March 2020



December 2019 Agricultural Survey

Farms have been experiencing mixed fortunes. Evidence is pointing to the industry reacting to changeable weather conditions.

Heavy rainfall led to a decrease in the area used to grow winter-planted crops but the production of silage and haylage is now at a ten-year high.

Cattle and pig numbers continue their downward trend. Poultry numbers this year are up. The sheep flock recovered from poor weather in 2018.

The average rent for agricultural land remains stable in real terms. Rents tend to be highest in the east due to better quality land.

Introduction

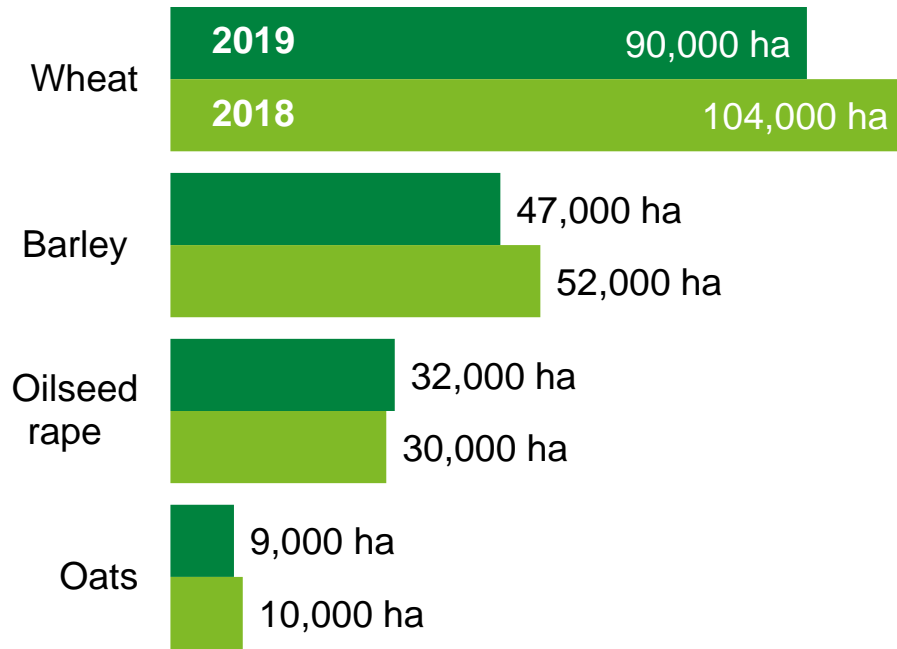
Commonly used terms

Hectares (ha): the official measurement of agricultural land. One hectare is 10,000m² or roughly the same size as a full-size rugby pitch.

Ten-year average: This publication compares current values to values over the past ten years. This provides a valuable comparison to previous years and helps set the latest figures in a wider context.

Graphs in this publication show selected categories

Decrease in winter crops as rainfall increases



Crops planted in autumn and grown during winter are known as winter-planted crops. The area planted is dependent on weather. For example, heavy rainfall negatively impacts the area sown. The remaining area is generally planted in spring.



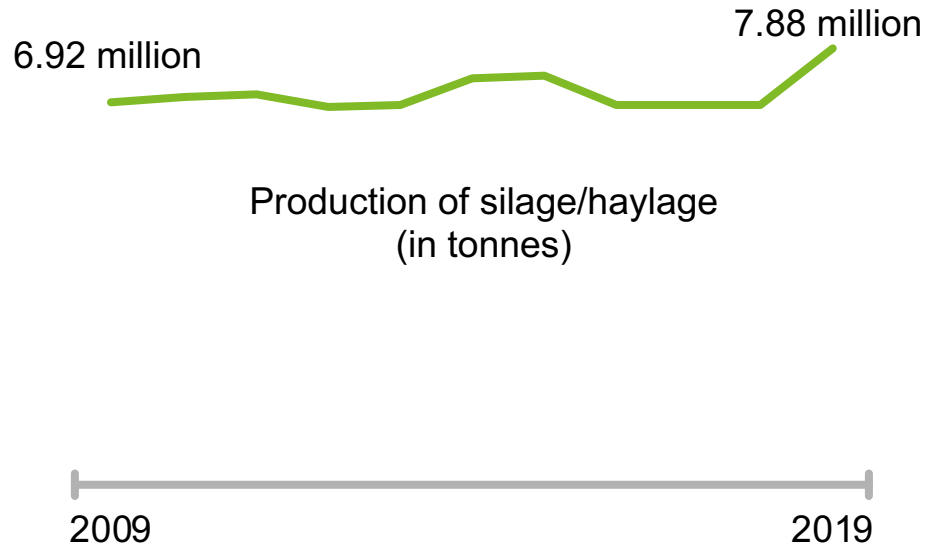
Area used to grow winter crops **177,000 hectares**

The area used to grow winter-planted crops decreased by ten per cent compared to the previous year.

Wheat and oats saw the largest reductions. The area used to grow wheat has gone down by 13 per cent and oats by 12 per cent. Oilseed rape was the only crop that increased in area, by four per cent.

The decrease in winter-planted crops is likely to be due to heavy rainfall in late summer and early autumn, with August being the wettest in over 100 years. This made it harder to plant and grow wheat, oats and barley. Oilseed rape, planted earlier in the season, was less affected.

Large increase in animal feed production



Grass silage is grass cut in the summer which is fermented and has a high moisture content. It is used as animal feed in the winter. **Haylage** is grass cut in the summer which has a low moisture content. It is mostly used to feed horses.

Hay is grass which has been cut and left to dry, after which it is stored. It is used as animal feed.



Production of grass silage or haylage

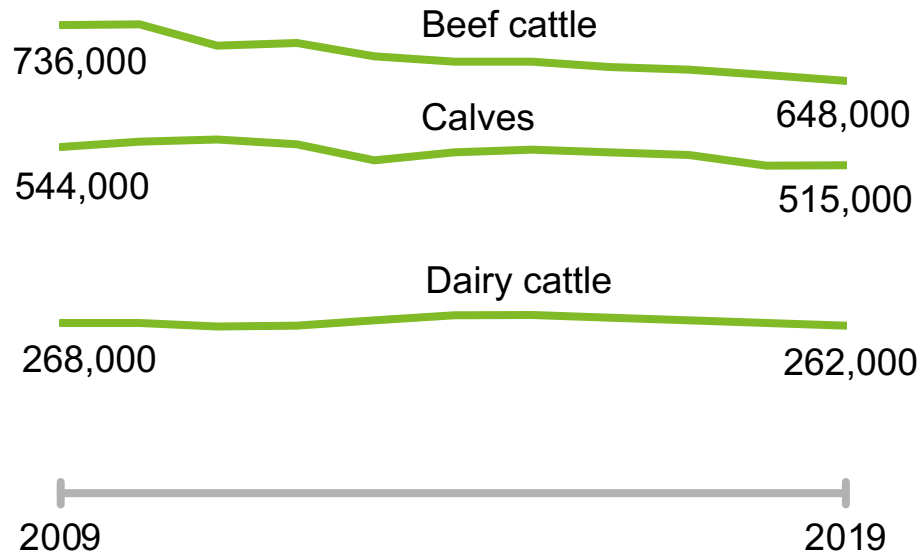
7.88 million tonnes

Better growing conditions in 2019 meant that the estimated production of grass silage or haylage increased by 15 per cent. Production is now 13 per cent higher than the ten-year average.

The increase in the production of grass silage or haylage was mainly due to an increase in yield. On average, farmers produced 22 tonnes of silage or haylage per hectare, an increase of 13 per cent. The total area used for silage and haylage remained relatively stable, with a two per cent increase.

The production of hay and arable silage also increased. Hay production increased by eight per cent to 308,000. The production of arable silage increased to 323,000 by 12 per cent.

Cattle numbers continue long term decline



By law all cattle in Scotland must be registered onto the UK Government's 'Cattle Tracing System'. Each animal has a unique tracking number shown on an ear tag. The cattle numbers shown in this publication are taken from the Cattle Tracing System.



Number of cattle
in Scotland

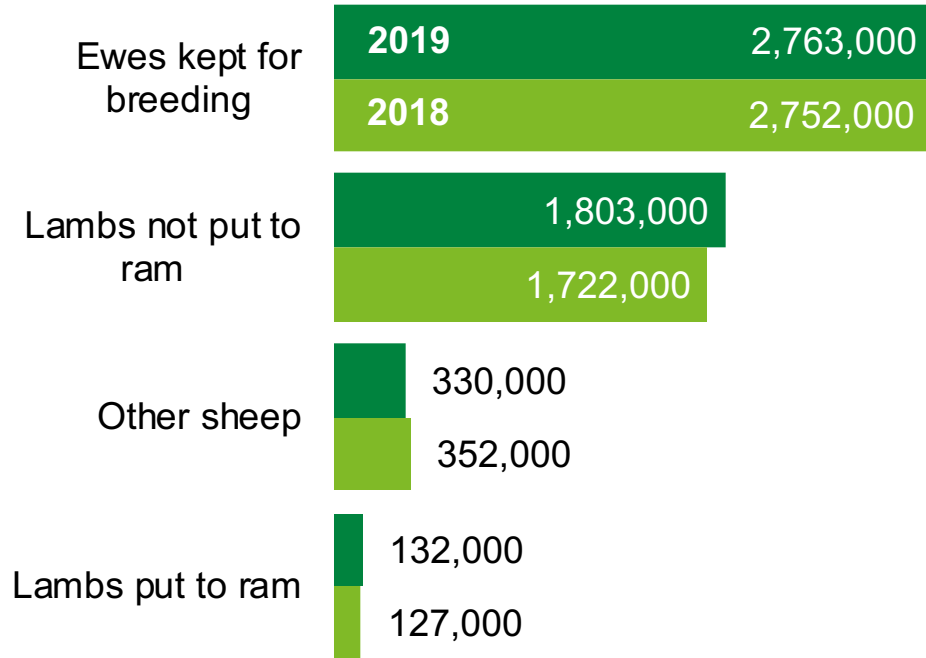
1.63 million

Cattle numbers continue to decline. In December 2019, the total number of cattle was 1.63 million. This is six per cent lower than the ten-year average and a drop of two per cent compared to the previous year.

Both the dairy and beef cattle herd size declined by two per cent. The number of calves remained stable.

The long term decline in cattle is likely related to an increased cost of feed, vets and animal housing. In addition, the introduction of the Single Farm Payment in 2005 stopped subsidies based on the number of cattle owned. The removal of the support, also known as coupled support, led to a decrease in the profitability of cattle.

Sheep numbers recover from poor weather



Sheep have lambs once per year, during springtime. The number of lambs on farms declines from spring to winter time as lambs are sold for slaughter. This means that lamb numbers are lower than reported in the June Agricultural Census.



Number of sheep
in Scotland

5.03
million

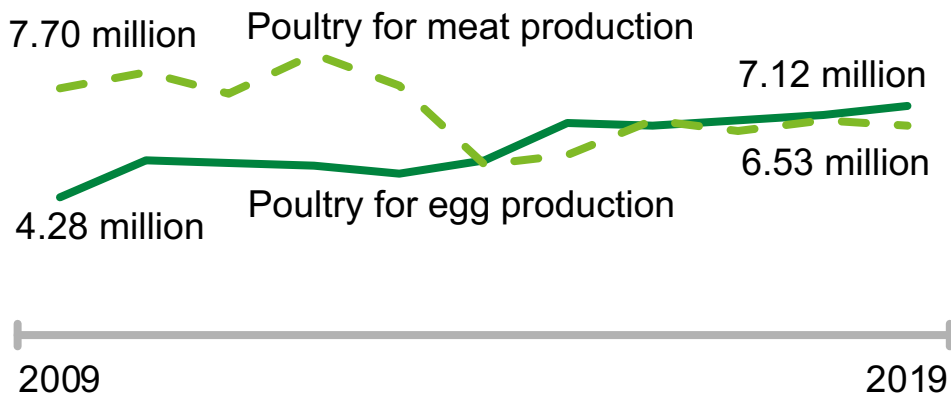
There is a small increase in sheep numbers compared to last December. The total number of sheep has gone up by two per cent. This is mostly due to a five per cent increase in lambs.

The higher number of lambs indicates that the sheep flock has recovered from challenging weather conditions in 2018. Sheep numbers are now above the ten-year average of 4.87 million. This might be linked to mild conditions in the lambing season.



Number of poultry
in Scotland

14.91
million



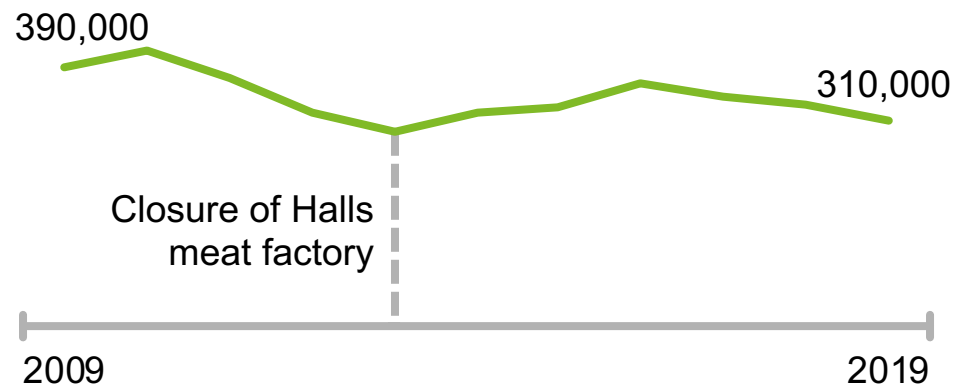
In December 2019, there was a one per cent increase in poultry compared to the previous year. This was driven by an increase in the number of poultry birds for egg production and fowls for breeding.

The number of poultry birds for meat production decreased by two per cent. They are now outnumbered by birds for egg production by more than half a million. This could be linked to a change in people's diets.



310,000

Number of pigs
in Scotland



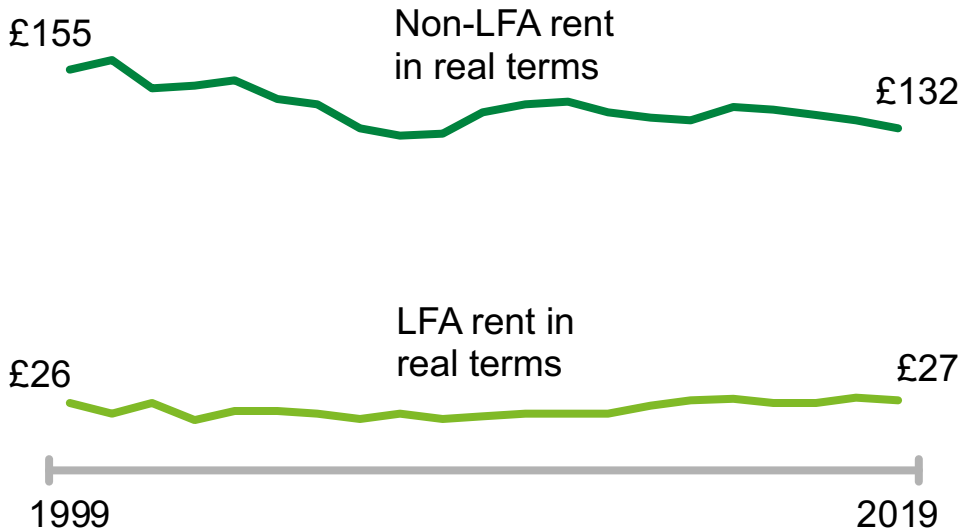
Pig numbers declined in 2019. There was a seven per cent drop compared to the previous year. After a brief recovery from 2014 to 2016, this is the third year in a row that pig numbers have fallen.

Agricultural rents remain stable over the past year



Average annual
rent for
agricultural land

£40 per ha



“Less Favoured Area” (LFA) is land which has a natural disadvantage that makes agricultural production difficult. Over 5.73 million hectares of farmland (85%) is LFA land.

A “real terms” value is a value that has been adjusted for inflation. Inflation is the rate of increase in prices for goods and services from one year to the next.

Average rents have remained stable at £40 per hectare. Farmers pay more rent for better quality land. In 2019, the average rent for non-LFA land was £132 per hectare. In real terms, this is three per cent lower than it was in 2018. In areas with poorer quality land, rents tend to be lower. The average rent for LFA land was £27 per hectare, down by one per cent on 2018.

Average real terms rents have fallen from £155 to £132 per hectare for non-LFA farms since 1999. For LFA land rents have increased from £26 to £27 per hectare.

Farm types which can operate on LFA land, such as cattle and sheep farms, generally have smaller rents. Cereal farms, which require good quality land, have larger rents.

Eastern areas have the highest agricultural rents



Regions with the highest agricultural rents



Median rents
in Lothian
£145
per ha

Regions with the lowest agricultural rents



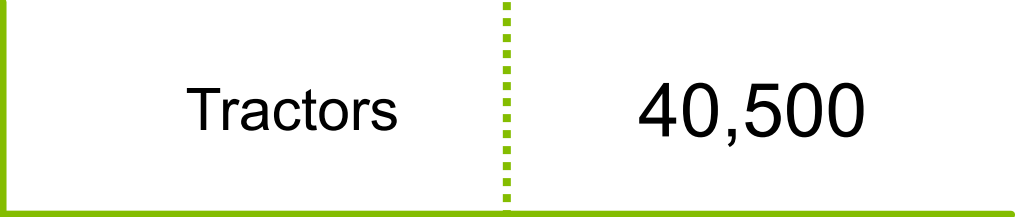
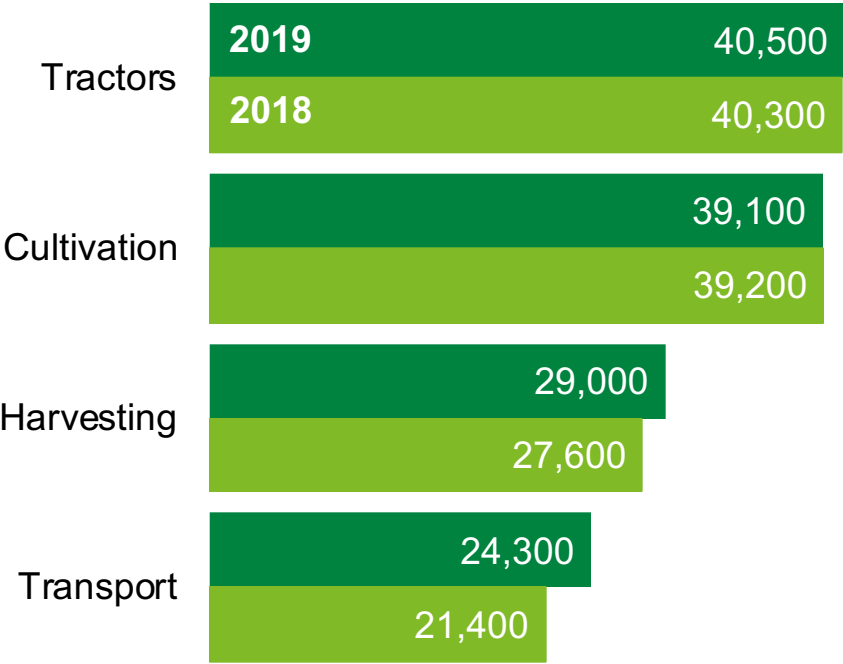
Median rents vary across the country, mostly due to quality of land and accessibility of the area. Rents are generally higher in eastern areas, where the majority of cereal farms are located, and southern areas, containing the majority of dairy farms.

Areas with the lowest agricultural rents include Shetland, Argyll & Bute and Highland. These areas contain mainly LFA land, used for rough grazing for sheep.

The **median** is a measure of average that identifies the middle value, where half the rents are higher and half the rents are lower. It is a better measure of the “typical” average rental value than the mean as it not impacted by extremely high or low rents.

Rents calculated from very low sample sizes (<5 holdings) have been excluded from the graph.

Slight increase in machinery levels on farms



Information on machinery is only collected for larger farms. Data on equipment such as field crop or fruit sprayers, drainage and ditching equipment, milking parlours and cattle weighing crushes are also collected.

In 2019, there was a small increase in machinery levels on farms. The numbers of tractors and machinery for cultivation remained stable. Machinery for harvesting went up by five per cent, and transport increased by 14 per cent.

This increase follows a longer term downward trend in machinery levels. Since 2009, machinery for cultivation has fallen by 18 per cent and machinery for harvesting has fallen by 34 per cent.

This fall is likely to be due to hiring of machinery or participation in machinery rings.

December 2019 Agricultural Survey

Data sources and more information

Data source

This data is collected via an annual December Survey run by the Rural and Environmental Science & Analytical Services Division of the Scottish Government. The December Survey collects various data from agricultural holdings across Scotland. Sheep data are also collected during the annual sheep and goat inventory.

A full quality assurance and methodology report can be found accompanying this report.

<http://www.gov.scot/ISBN/978-1-83960-644-1>

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Data tables

A full set of data tables for this publication is available online in the accompanying spreadsheet.

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Comparisons

Similar surveys take place each year in England, Wales and Northern Ireland. Full results for the United Kingdom are available via the link below:

<https://www.gov.uk/government/collections/agriculture-in-the-united-kingdom>



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