High Level Summary of Statistics
Agriculture, Fisheries and Rural

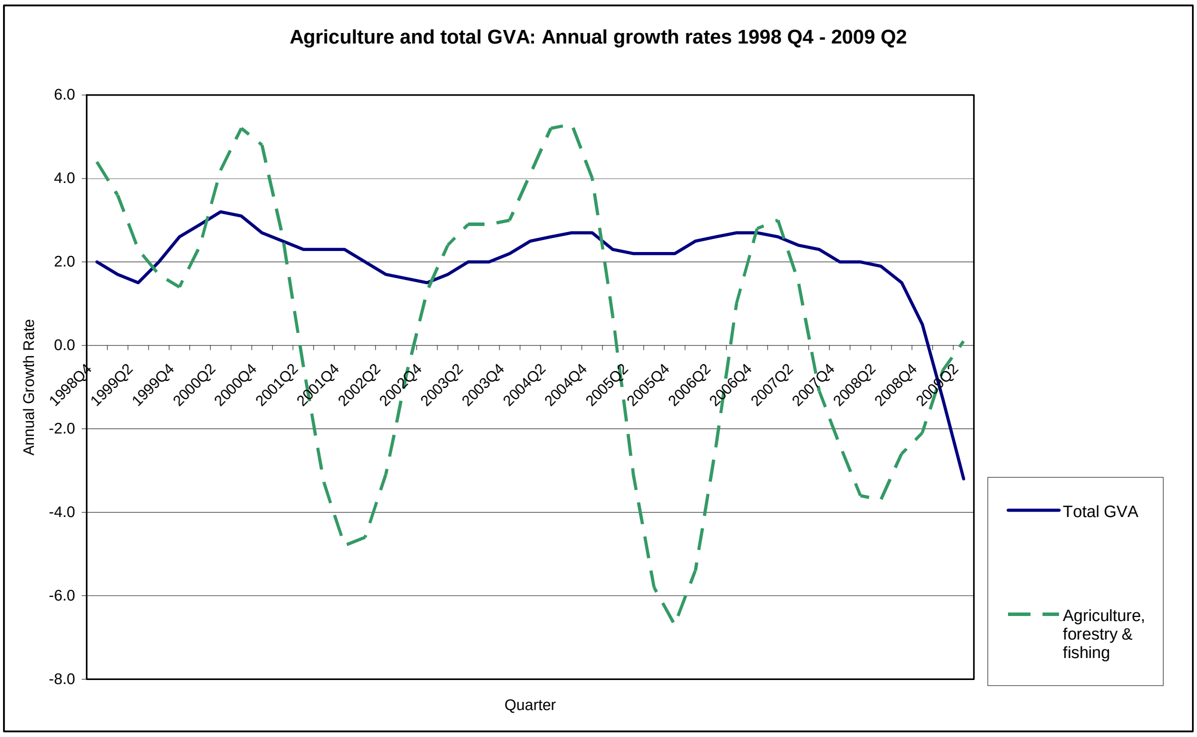
Sustainable Farming

Rural Economy

Last updated: October 2009

Since 2005 Q1 Agriculture, Forestry and Fishing annual growth rates have generally been lower than for the economy as a whole. It should be noted that the annual growth rates for this sector are volatile.

Agriculture remains the dominant land use in rural areas, and whilst difficult to quantify, both its direct impact upon the environment and indirect impacts (e.g. tourism) should be acknowledged.



Note: the methodology for estimating quarterly GVA for this sector was revised in October 2006.
Source: Quarterly GVA Statistics, Scottish Government

Total Income From Farming

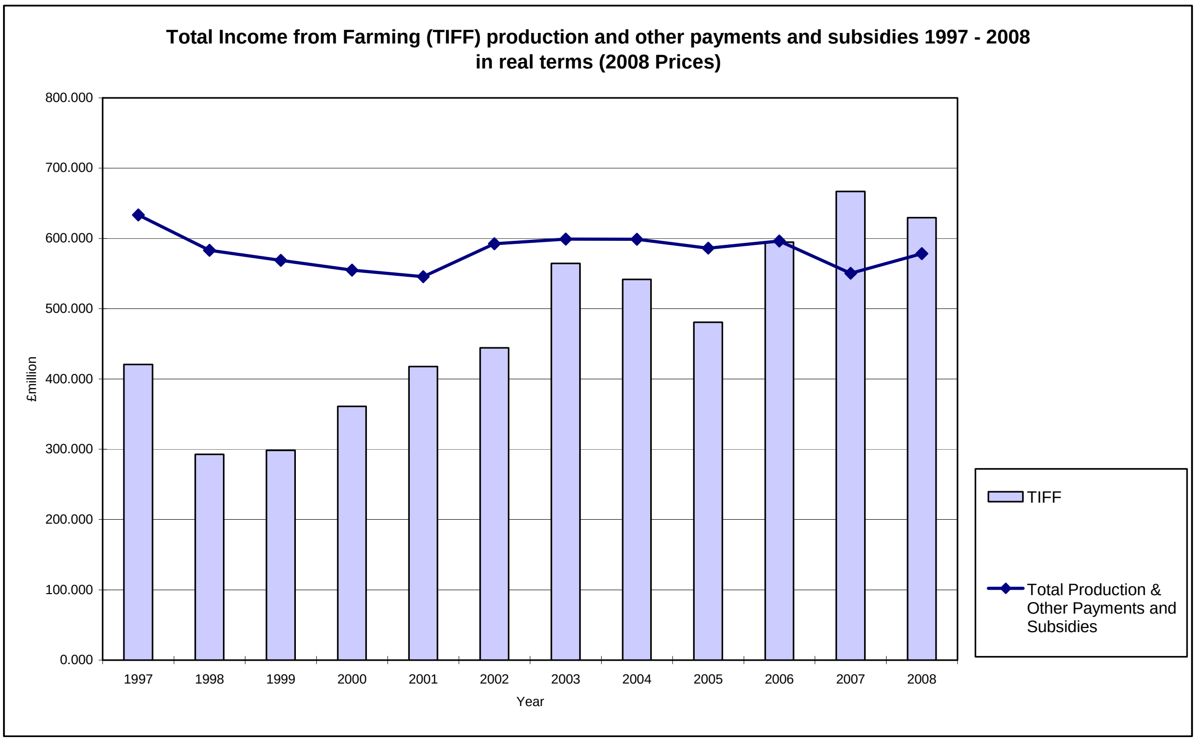
Last updated: February 2009

Between 1990 and 1995 Scottish aggregate farm incomes in real terms almost tripled to reach a historically high level in 1995.

Compared to the mid 1990s aggregate farm incomes remain relatively low. The fall from 1995-98 was primarily due to a strong pound, weak world commodity prices and the impact of BSE (Bovine Spongiform Encephalopathy) and then Foot and Mouth Disease. Since 1998, in real terms, Total Income from Farming (TIFF) has recovered to two-thirds of the 1995 peak.

TIFF figures for 2008 show aggregate incomes to have decreased by £11.9 million in 2008 to £629.6 million, a fall of 1.8 per cent over the previous year before inflation is taken into account. In real terms, this represents a fall of 5.6 per cent.

Whilst output values have increased by £187.3m between 2007 and 2008, input costs have also risen by £216.6m, mainly due to increases in the cost of animal feed (up by £69.9m), fertilisers and lime (up by £72.1m) and fuel and oil (up by £37.1m).



Source: 2008 Scottish Total Income From Farming (TIFF) estimates, Scottish Government Rural and Environment Research and Analysis Directorate.

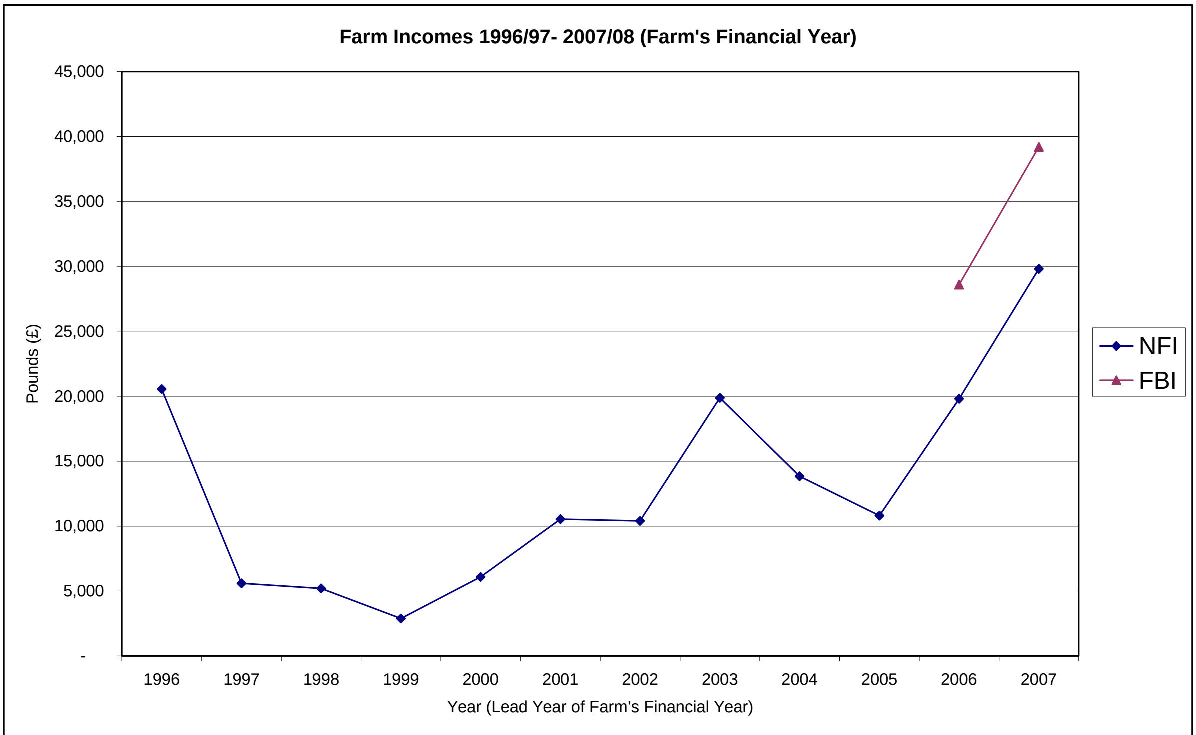
Web link
2008 Scottish farm income estimates (Published January 2009)
http://www.scotland.gov.uk/News/Releases/2009/01/29094604
Publication
Scottish Agriculture - Output, Input and Income Statistics (Published March 2008)
http://www.scotland.gov.uk/Topics/Statistics/Browse/Agriculture-Fisheries/PubOutputInputIncome
This publication will be updated in Spring 2009 to incorporate the latest 2008 Total Income from Farming estimates.

Farm Incomes: Net Farm Income and Farm Business Income

Last updated: September 2009

From August 2009, Farm Business Income (FBI) replaces Net Farm Income (NFI) as the headline farm business income measure. The main advantages of FBI over NFI are: FBI treats the tenure of farms as is, reflecting actual tenure costs, unlike NFI which is based on a tenant type farming definition; FBI represents the return to all those with an interest in the farm business, unlike NFI which only represents the return to the farmer and spouse; FBI includes net interest payments, reflecting actual loan costs, whereas NFI is based on a definition of zero indebtedness; FBI includes income from a range of diversified activities which make use of farm resources, whereas NFI does not include diversified income.

The trends between 2006/07 and 2007/08 were very similar for FBI and NFI, reflecting the constant nature of the factors which account for the differences between the two. Between 2006/07 and 2007/08, FBI and NFI increased for all farm types other than 'Lowground Cattle and Sheep'. The biggest increases were experienced by Cereal, General Cropping and Dairy farm types, driven by increases in the value of cereal and milk output. The 2007/08 results also incorporate higher grants and subsidies compared to 2006/07. There was a 50% increase in LFASS payments and one-off payments made under the Scottish Ewe Scheme.



Source: Farm Accounts Survey, Scottish Government Rural and Environment Research and Analysis Directorate

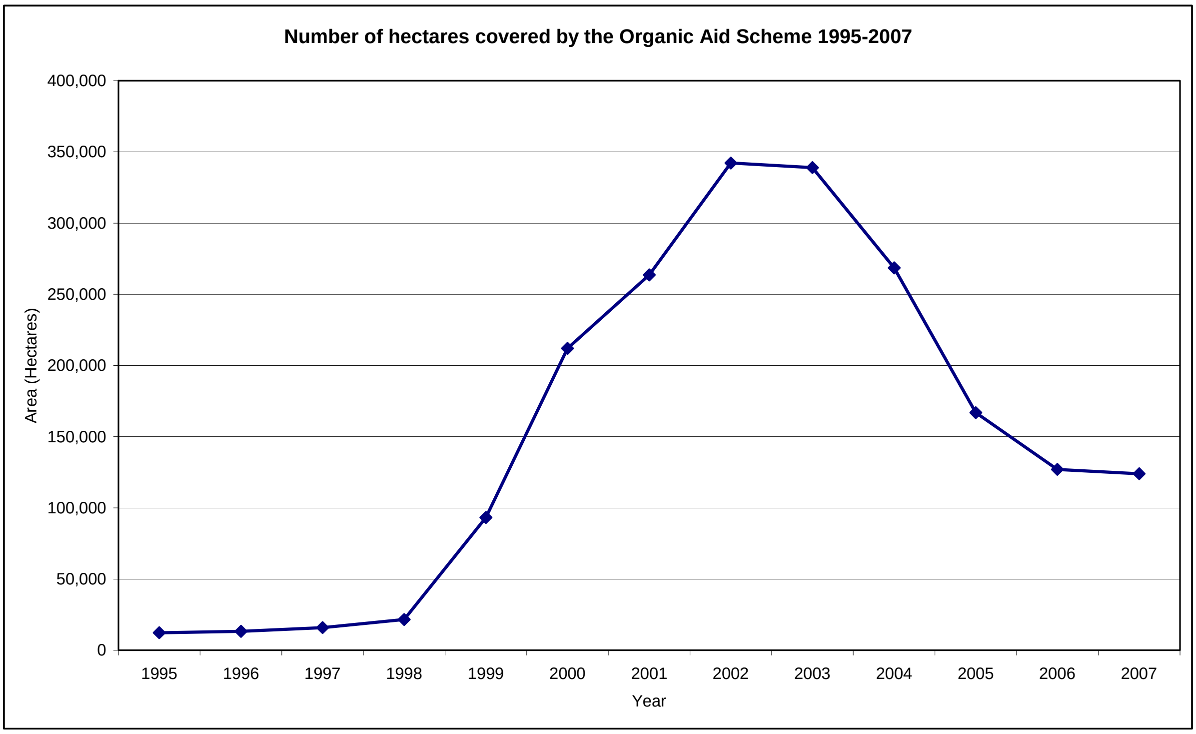
Web link

Farm Business Incomes in Scotland (published August 2009)
http://www.scotland.gov.uk/Publications/2009/08/26130432/0
First release of Farm Business Income statistics for 2006/07 and 2007/08 and comparative analysis with Net Farm Income.
Farm Incomes in Scotland (published April 2009)
http://www.scotland.gov.uk/Topics/Statistics/Browse/Agriculture-Fisheries/PubFarmIncomes

Organic Farming

Last updated: April 2008

Up until 2002, there was a marked increase in the area covered by the Organic Aid Scheme but this has declined since then. Until recently, the bulk of the increase has involved rough grazing, however, the Organic Aid Scheme is now targeted more towards attracting the conversion of arable land, where the environmental benefits of converting to organic land are greater.



Source: Organic Annual Report to 2005, CAP Payments Division from 2006 onwards

Publication

Organic Annual Report 2007 (Published 2007)

http://www.scotland.gov.uk/Resource/Doc/166641/0045438.pdf

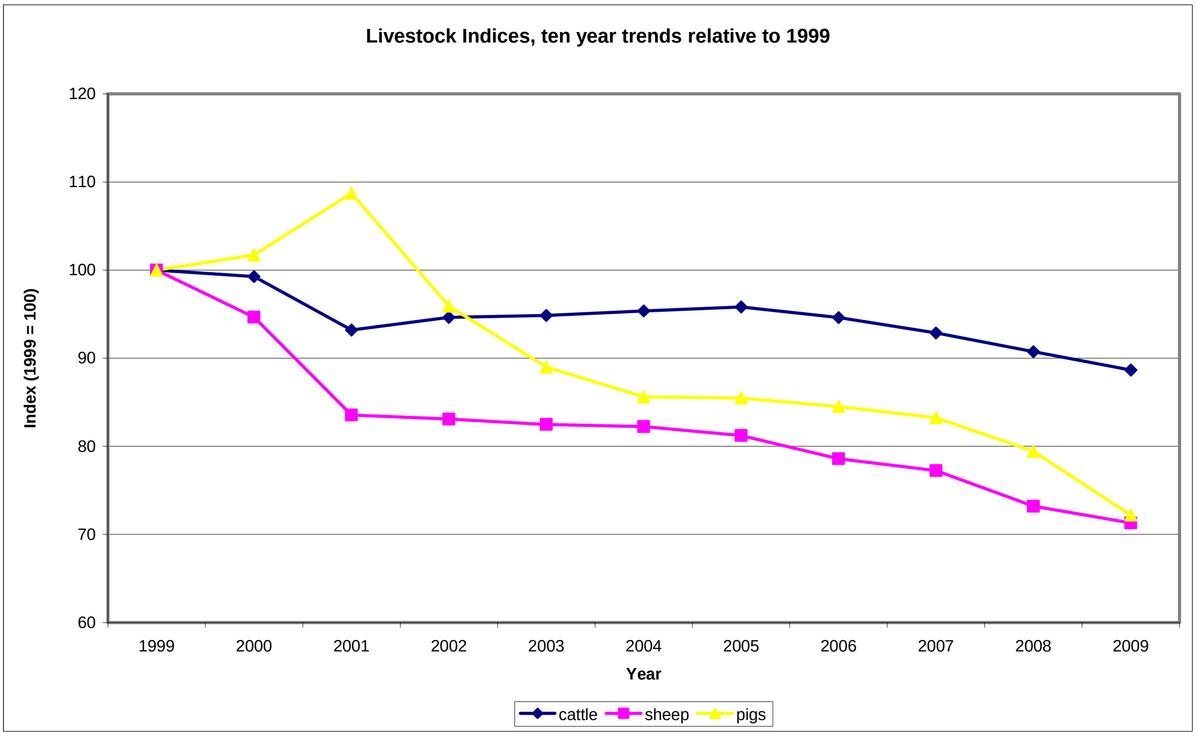
Livestock

Livestock Trends

Updated October 2009

Sheep and cattle numbers both declined sharply in 2001 (by 12% and 6.1% respectively), when there was a widespread outbreak of Foot and Mouth Disease in the UK. Following this, cattle numbers increased by 2.8% between 2001 and 2005 while sheep numbers declined 2.8% over the same period. From 2005 to 2009, cattle numbers have decreased by 7.5%, and sheep numbers have declined by 12.2%.

Pig numbers reached their highest level in the past 10 years in 2001, and then declined sharply, falling by 21% between 2001 and 2004. Between 2004 and 2005, the trend was close to flat (-0.1%), but following this, numbers have started to decline again, falling by 15.6% between 2005 and 2009.

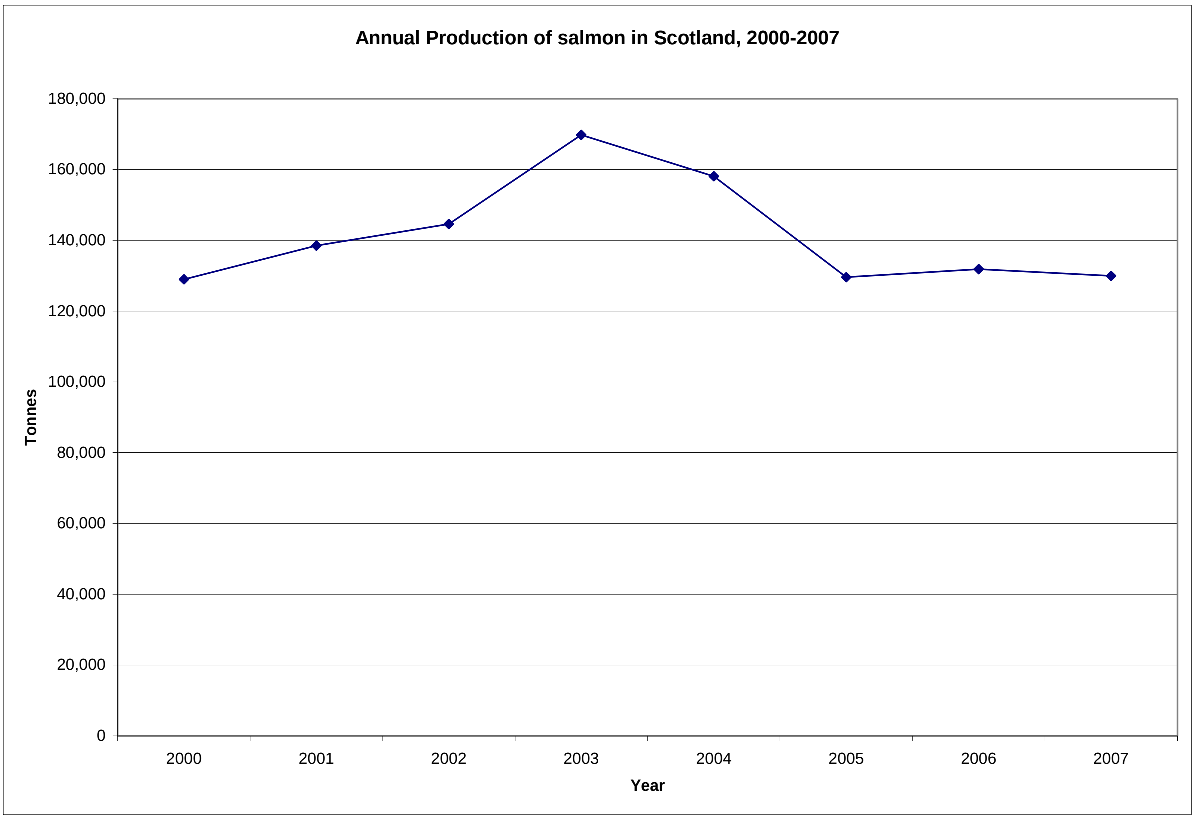


Fisheries

Aquaculture
Last updated: April 2008

Current data suggests that there are around 1,450 jobs supported directly by farmed fin fish production and a further 400 jobs in farmed shellfish production. and that the aquaculture sector had a value of approximately £401 million in 2006. The production of farmed Atlantic salmon, including smolts, accounted for nearly two-thirds of the jobs.

Production of salmon increased between 2000 and 2003, there was a drop in production in 2004 and 2005 with a small increase again in 2006 followed by a another small reduction in 2007, as can be seen in the graph below.



Source : Fisheries Research Services (FRS)

Web link
[Fisheries Research Services (FRS)](http://www.marlab.ac.uk/Delivery/standaloneCM.aspx?contentid=770)
http://www.marlab.ac.uk/Delivery/standaloneCM.aspx?contentid=770

Sea Fisheries

Last updated: September 2009

The graph below displays the value of landings by Scottish based vessels into the UK and abroad for the years 2003 – 2008.

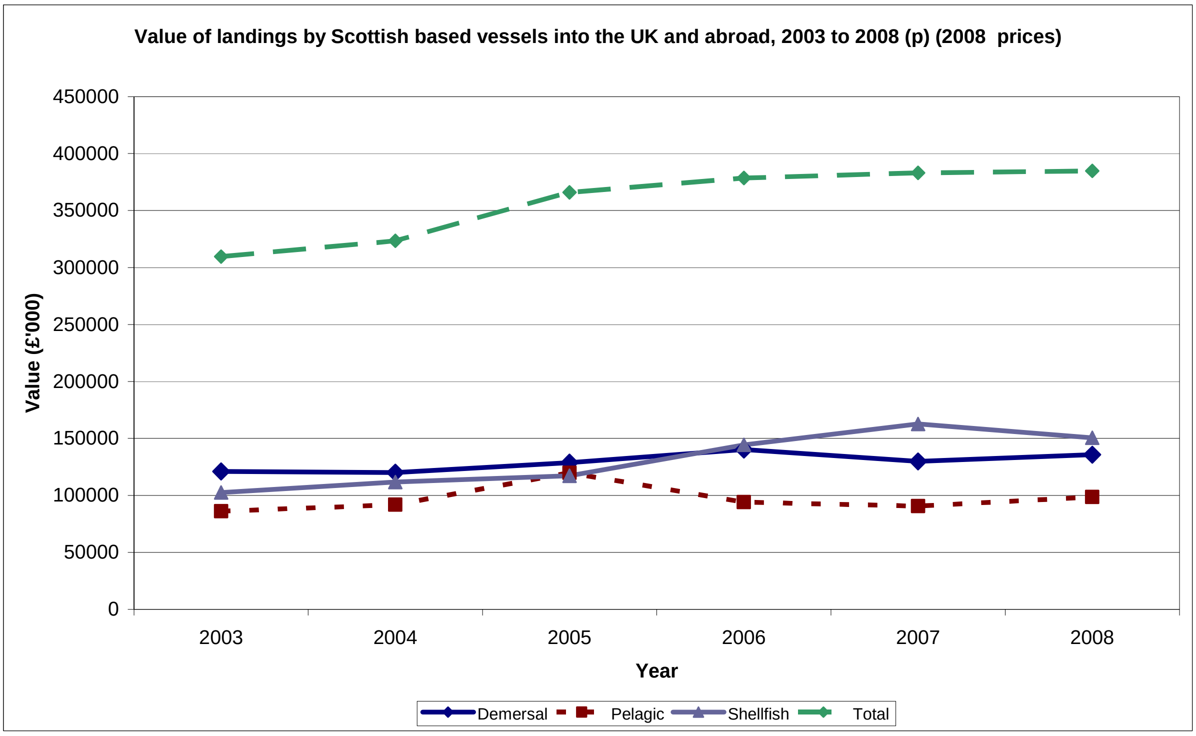
The total value of fish landed by Scottish vessels in 2008 was £396 million, representing an increase of 25 per cent in real terms over 2003 – 2008, during which period the value of landings has steadily increased. In real terms, the value of all landings by Scottish based vessels is at its highest since 2001.

The value of demersal landings fell between 2002 and 2003, recovered between 2003 and 2006 but fell back in 2007. In 2002, the value of demersal landings by Scottish based vessels totalled £137m; this fell to £109m in 2003; then rose to £136m in 2006 but fell back to £130m in 2007 before recovering to £139 million in 2008. The 2008 value represents an increase in real terms of 13 per cent on the 2003 figures.

The value of pelagic landings has increased from £78m in 2003 to £101m in 2008; an increase of 15% in real terms over the period.

The value of shellfish landings increased markedly over the same period and by 2006 shellfish had become the most valuable sector to the Scottish fleet. In 2003, the value of landings was £93m and, in 2008, £155m; an increase of 48% in real terms.

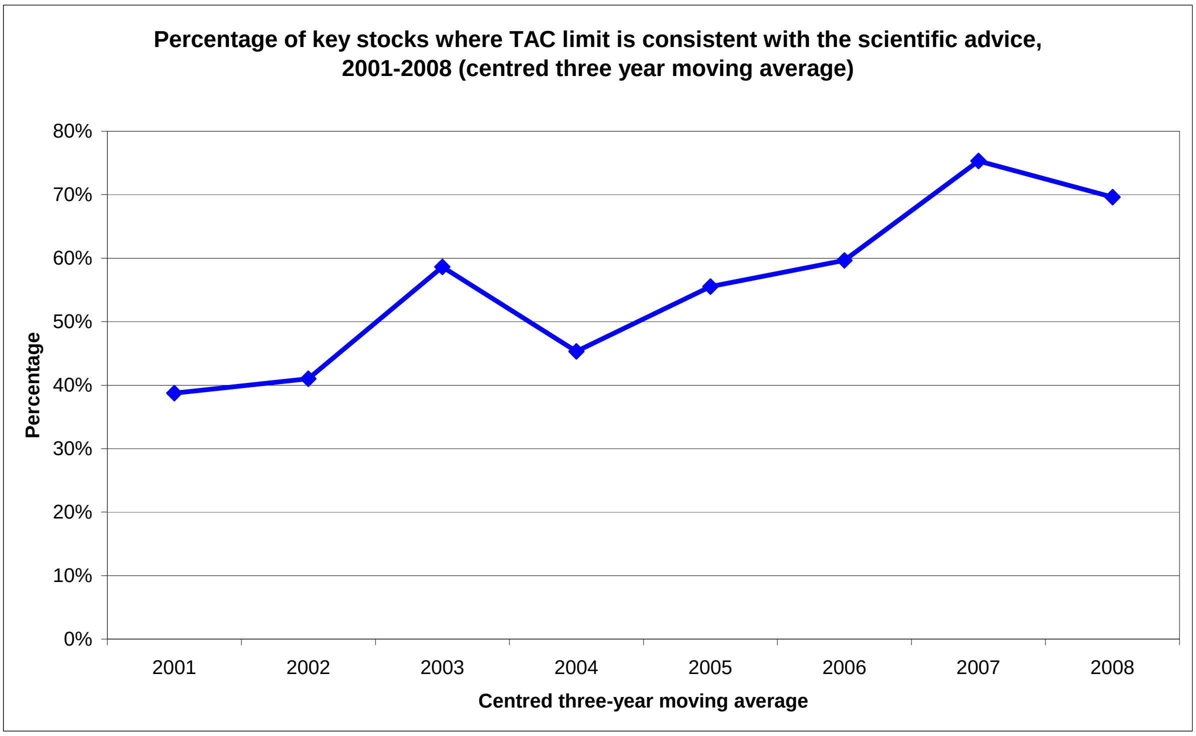
In 2003, demersal landings accounted for 39% of the total value of landings and was the most valuable sector to the Scottish fleet; by 2008, this had fallen slightly to 35%, lower than the 39% accounted for by shellfish.



Source: Marine Scotland Science

The Scottish Government has set a National Indicator to ensure that the proportion of Scotland's key commercial fish stocks where the Total Allowable Catch (TAC) set in European negotiations is in line with scientific guidance is at least 70% in 2015. Some of our key stocks have been at historically low levels in recent years and we want to ensure that fish stocks are healthy and sustainable for future generations. This indicator will monitor the extent to which we are ensuring that more of key commercial fish stocks are classified as being at full reproductive capacity and are being harvested sustainably.

The proportion of Scotland's key commercial fish stocks where the quota (Total Allowable Catch (TAC)) set in European negotiations was in line with scientific guidance was 60% in the 2006 baseline. It reached 75% in 2007 but decreased to 70% in 2008, equal to the 2015 target figure. The principle reason for the drop in indicator value in 2008 is that the scientific advice was not followed in December 2008 Fisheries Council when setting the TACs for nephrops stocks, the most commercially valuable species for Scotland. However, the methodology to arrive at that scientific conclusion is disputed by Scotland and many other EU member states and Scotland is working with the scientists on this.



Notes:
Note (1): Stocks for which there was no available advice for the year, or where the advice was unclear, have been counted as if the TAC was not consistent with the advice.
Note (2): For each year, the calculation of the proportion of fish stocks used data weighted by value for that year. Landings data for 2009 was estimated by 2008 landings data.
Note (3): Each point on the graph refers to the proportion of fish stocks where the TAC was set within scientific advice calculated over the three year period centred on that year.
Source: Marine Scotland Science

Publications

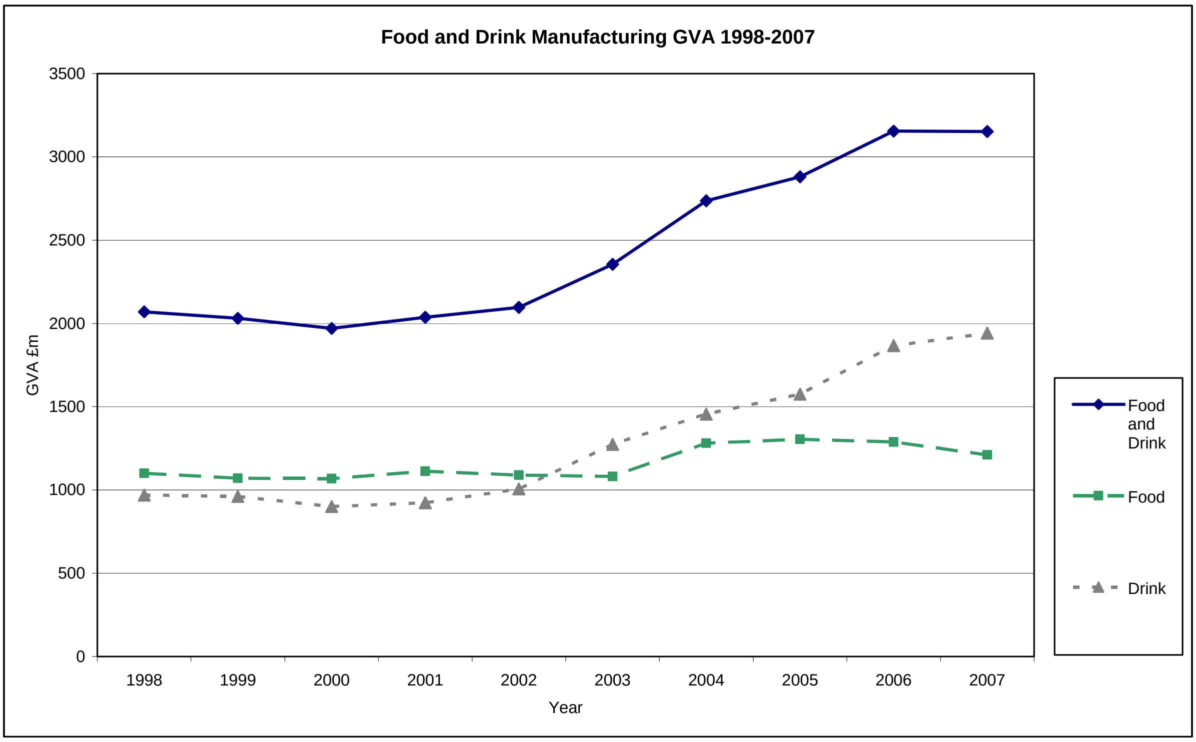
Scottish Sea Fisheries Statistics Publication
http://www.scotland.gov.uk/Topics/Statistics/Browse/Agriculture-Fisheries/PubFisheries
Provisional 2008 Sea Fisheries Statistical Tables
http://www.scotland.gov.uk/Topics/Statistics/Browse/Agriculture-Fisheries/provisional08tables

Food and Drink Industry

Food and Drink GVA

Last updated: October 2009

The figure shows total gross value added (GVA) at basic prices in Scottish food and drink manufacturing for each year 1998 to 2007. Between 2000 and 2006 total GVA in food and drink manufacturing increased year on year - rising from £1,969m in 2000 to £3,154m in 2006. The latest data for 2007 shows a slight fall in total food and drink manufacturing GVA. Drink manufacturing has been the main driver of the increase in total food and drink manufacturing GVA over the period and in 2003 drink manufacturing overtook food manufacturing GVA.

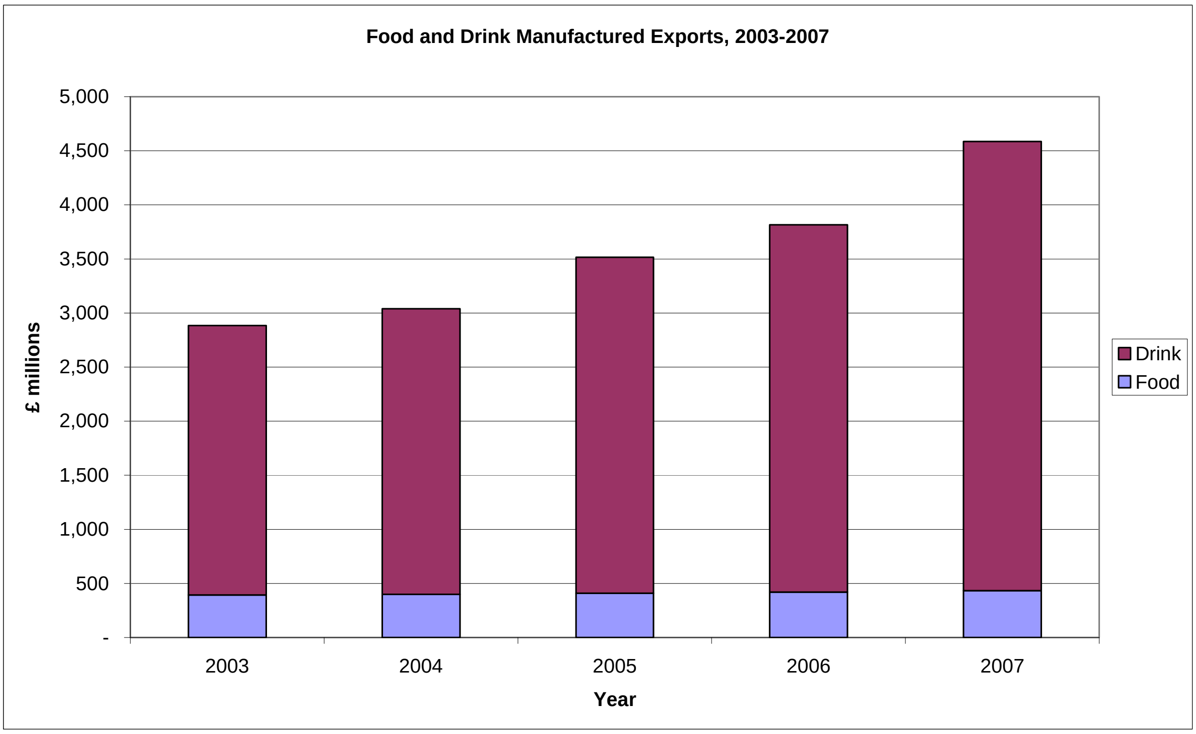


Source: Scottish Annual Business Survey (SABS)

Scottish Produce Exports

Last updated April 2009

The Global Connections Survey (GCS) estimates food and drink manufacturing exports since 2003. Food and drink manufacturing exports have increased by £1,700m since 2003 to reach £4,580m for 2007. Drinks manufactured exports accounted for over 90% of total food and drink manufacturing exports for 2007. The chart below provides a breakdown of food and drink manufactured exports since 2003.



Source: Global Connections Survey

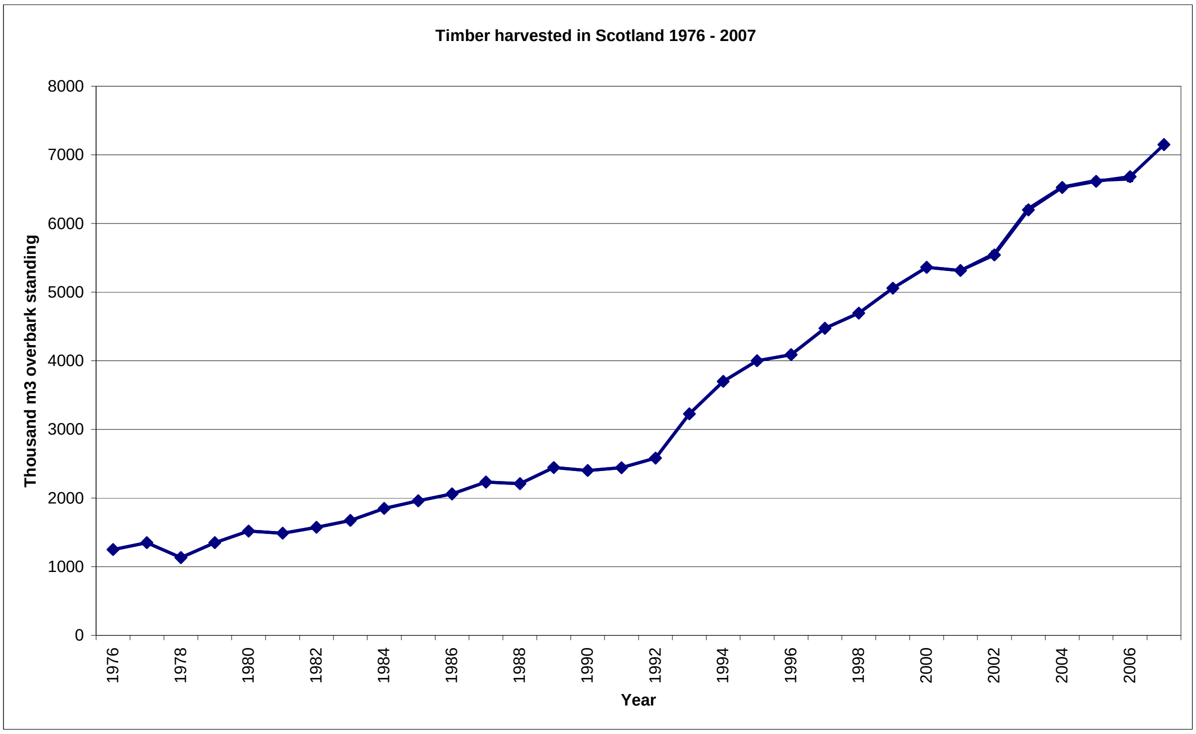
Forestry

Timber Harvested

Last updated: February 2009

A total of 7.2 million m^3 overbark standing of timber was harvested from forests in Scotland in 2007. This represents an increase of 60% from the 1997 level.

The last forecast of softwood conifer production (produced in 2006) indicated that timber availability would rise from an annual average of 6.9 million m^3 in the period 2007-2011, to 8.2 million m^3 in 2012-2016 and 8.9 million m^3 in 2017-2021. Current hardwood production is around 50,000 m^3, but more could be produced if markets were available.



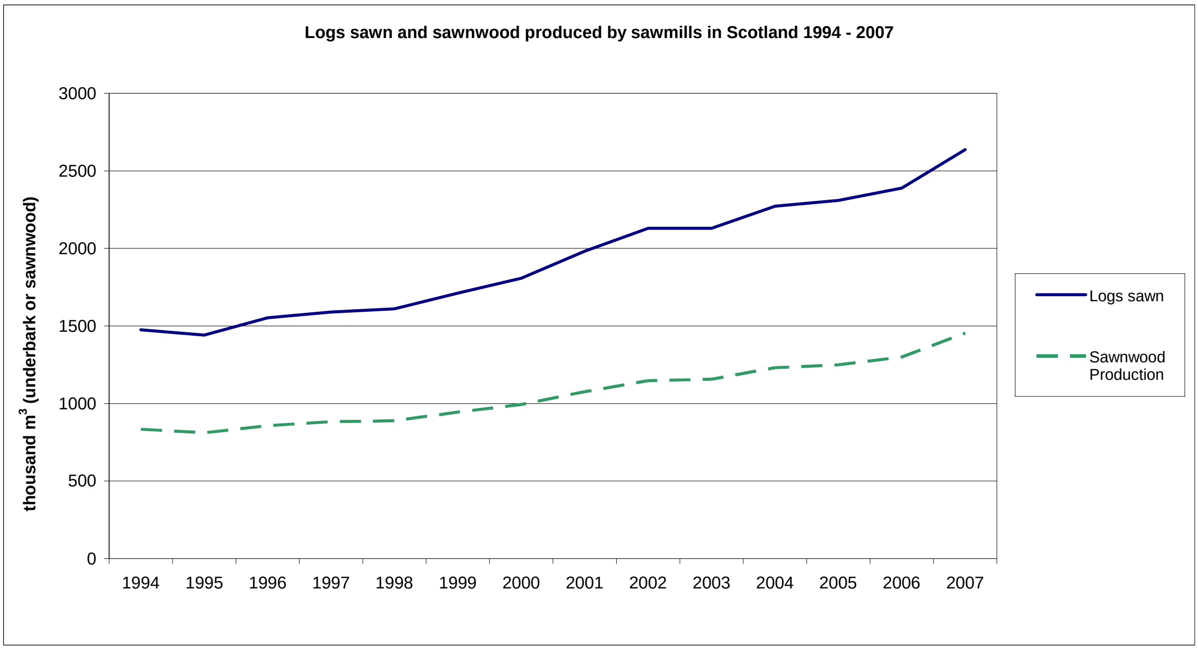
Source: Forestry Commission

Web link
[Forestry Statistics](http://www.forestry.gov.uk/statistics)
http://www.forestry.gov.uk/statistics

Sawnwood Production

Last updated: February 2009

A total of 2.7 million green tonnes were sawn by Scottish sawmills in 2007, producing 1.5 million m^3 sawnwood. This represents a 12% increase on the previous year and an increase of around two thirds since 1997.



Source: Forestry Commission

Web link
[Forestry Statistics](http://www.forestry.gov.uk/statistics)
http://www.forestry.gov.uk/statistics

Rural Areas

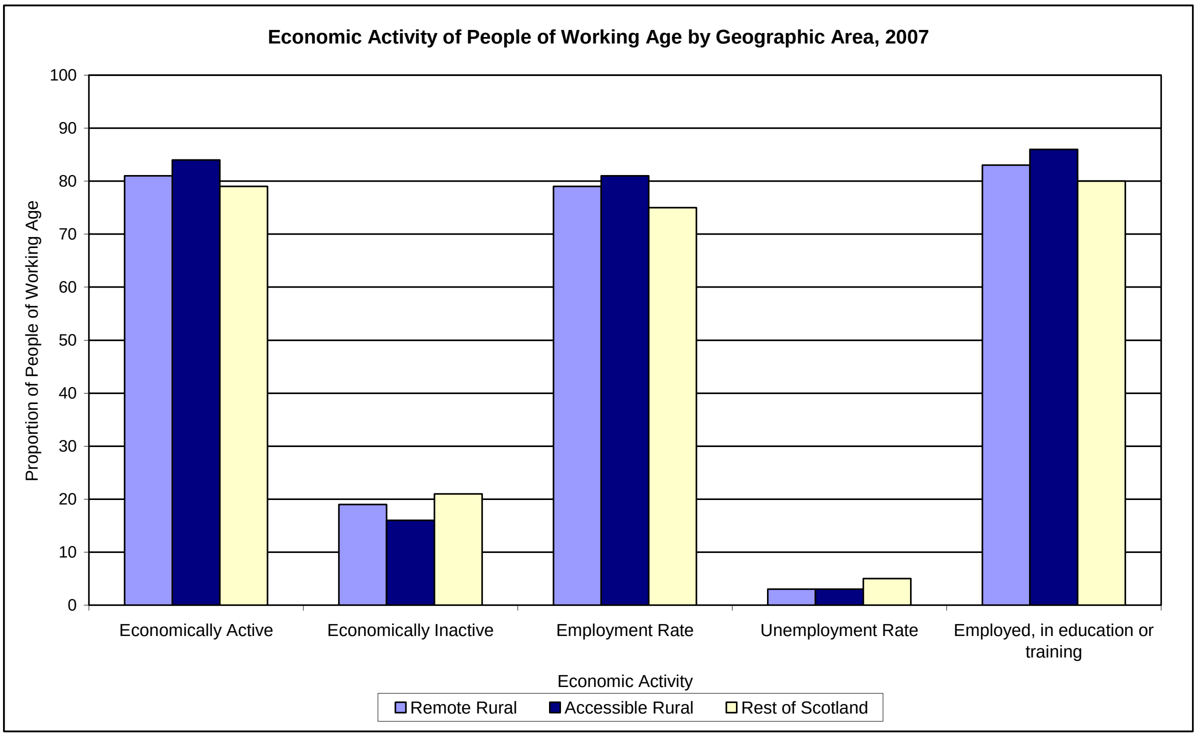
Rural Economic Activity

Updated February 2009

The chart below shows that a higher proportion of people in rural areas are economically active (i.e. employed or looking for work) than in the rest of Scotland. Correspondingly, inactivity rates (those neither employed nor unemployed are lower in rural Scotland than in the rest of Scotland. The main reasons for being economically inactive are long-term sickness or disability, being a student and looking after family. A higher percentage of the working age population is either employed in education or training in rural areas than in the rest of Scotland.

In keeping with this, the employment rate (the number of people employed as a proportion of the total population of working age) is higher in rural Scotland than in the rest of Scotland.

The unemployment rate (the number of people unemployed as a percentage of the number economically active) is lowest in rural areas.



Source: Annual Population Survey in Scotland 2007 and based on the Scottish Government Urban Rural Classification 2007-2008.

Note: The above figures are based on the working age population except for the Unemployment rate which is based on the Economically Active population aged 16 and over.

Publication

Rural Scotland Key Facts, 2008

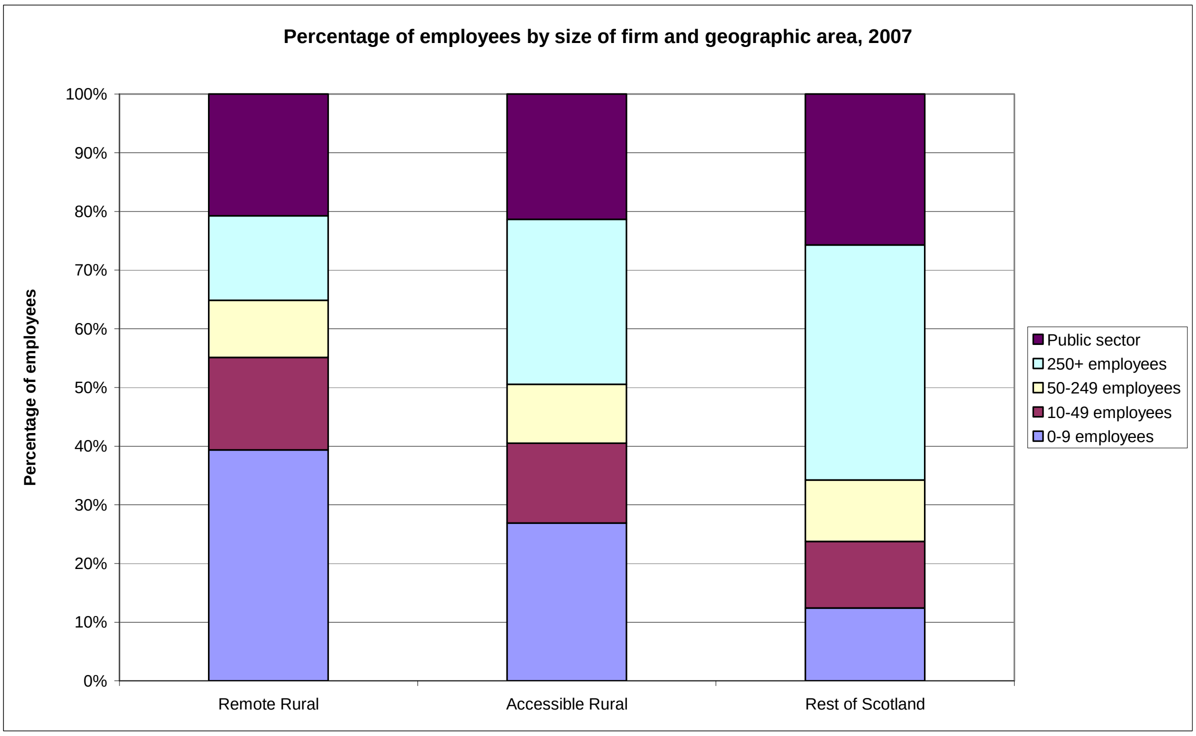
http://www.scotland.gov.uk/Publications/2008/08/27154843/0

Employment by Size of Business

Updated February 2009

The chart below shows that micro and other small businesses account for over half of those employed in remote rural areas and 41% in accessible rural areas. Micro businesses (0-9 employees) are particularly significant in remote rural areas employing a third of all those employed in rural areas.

Large businesses account for 40% of those employed in the rest of Scotland but only 14% in remote rural areas.



Source: Scottish Government, ONS (IDBR), 2007 and based on the Scottish Government Urban Rural Classification 2007-2008.

Publication

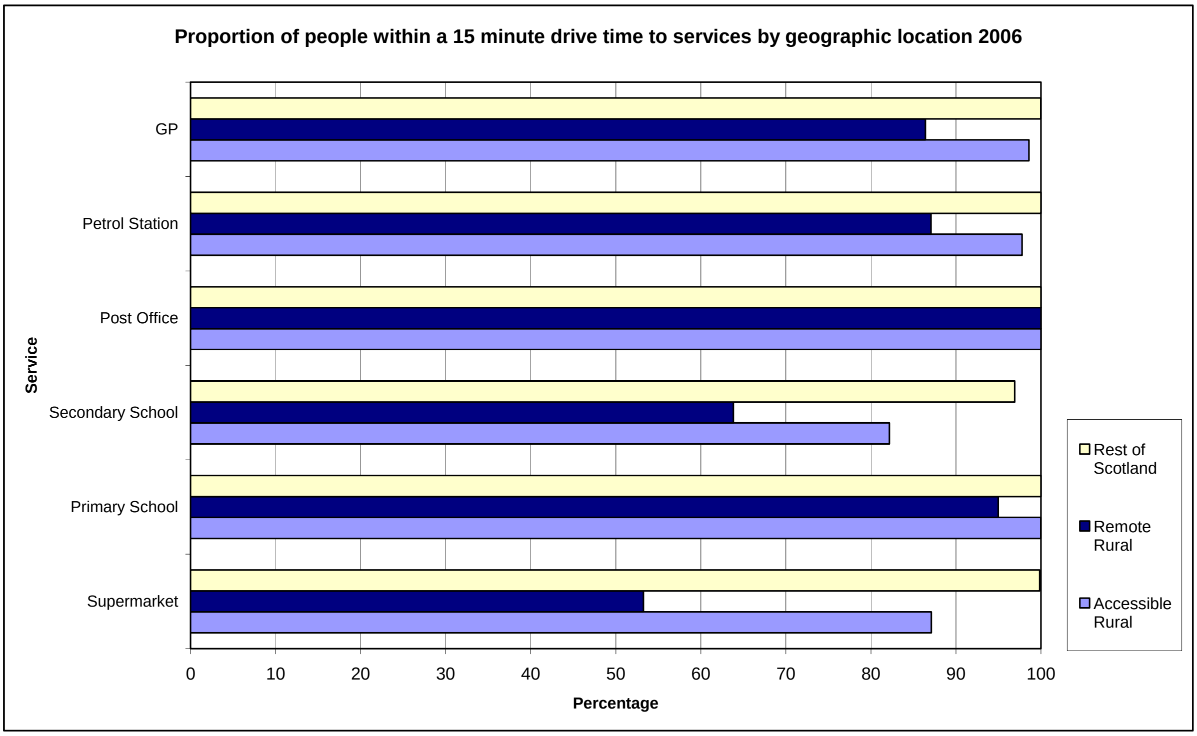
[Rural Scotland Key Facts, 2008]

http://www.scotland.gov.uk/Publications/2008/08/27154843/0

Rural Access to Services

Updated February 2009

The figure shows that almost 15% of people in remote rural Scotland are more that 15 minutes drive away from their GP. Access to petrol stations is a particular problem in remote rural areas.



Source: Scottish Index of Multiple Deprivation, 2004 (based on data zones)

Publication

[Rural Scotland Key Facts, 2008](http://www.scotland.gov.uk/Publications/2008/08/27154843/0)

http://www.scotland.gov.uk/Publications/2008/08/27154843/0