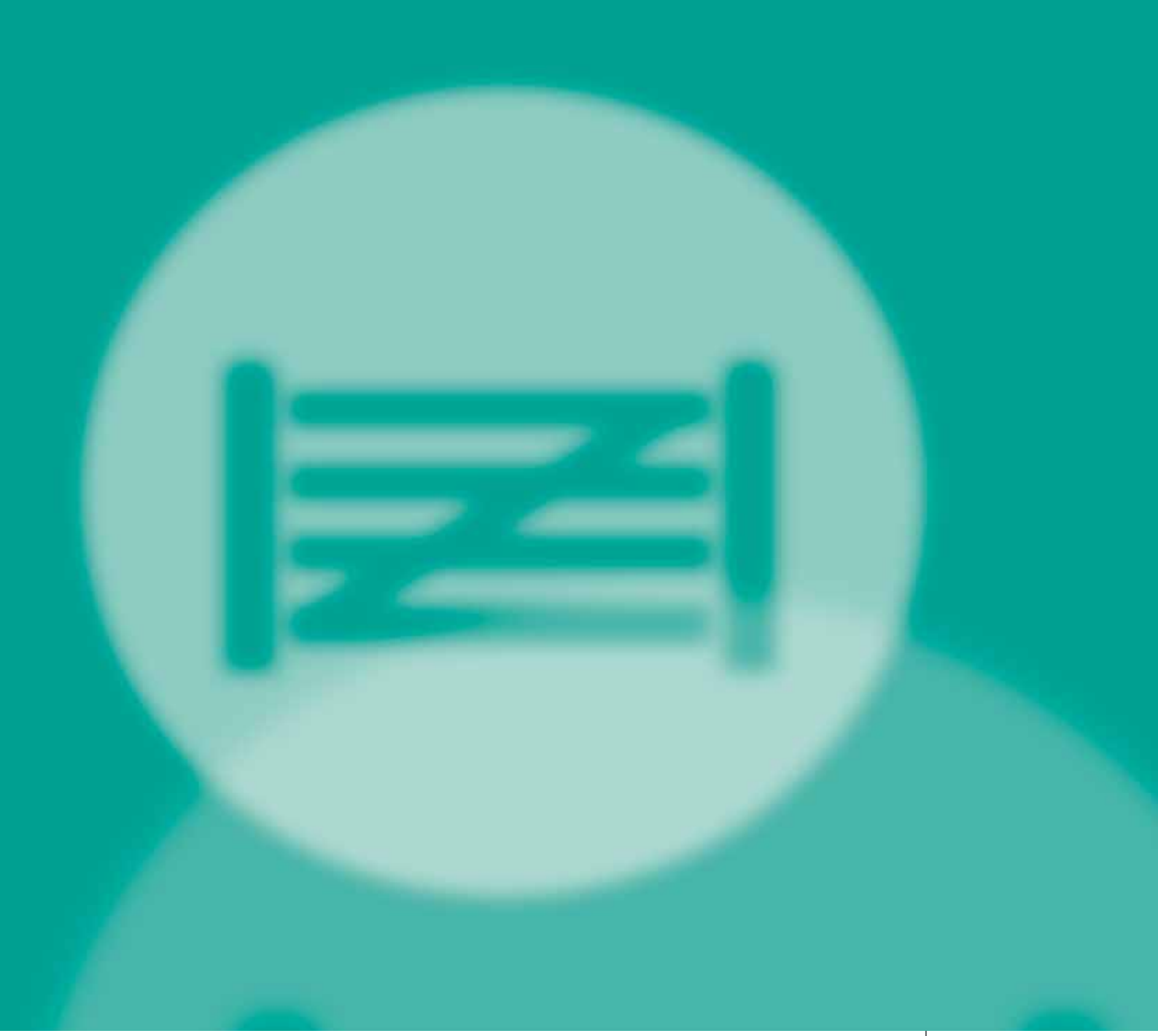

ECONOMIC REPORT ON SCOTTISH AGRICULTURE

2015 Edition

The Scottish Government
Riaghaltas na h-Alba

Economic Report on Scottish Agriculture

2015 Edition

Scottish Government Directorate for Environment and Forestry

Rural and Environment Science and Analytical Services

A NATIONAL STATISTICS PUBLICATION FOR SCOTLAND

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This is the 2015 edition of the Economic Report on Scottish Agriculture (ERSA) which has been compiled by the Rural and Environment Science and Analytical Services division (RESAS) in the Scottish Government (SG). It presents an overall picture of Scottish agriculture using data from the various agricultural surveys that RESAS manage.

The format of ERSA brings together related information to create a thematic structure. It gives a geographic and financial overview of the industry, followed by chapters on each of the sectors, labour figures and UK comparisons. The various sections bring together the information on related subjects from three sets of data

- 2014 June Census and December surveys of farms,
- the Farm Accounts Survey 2013-14 – which collects statistics from the business accounts of around 500 farms in Scotland,
- Total Income from Farming 2013 and 2014 – estimates of the output values and associated input costs of Scottish agriculture which underpins the Scottish Agricultural Account which is submitted to the EC every year.

For ease of use by those familiar with previous editions, the statistical tables have remained relatively unchanged since last year and where possible retain their numbering. Additional tables, and more extensive versions of tables in the publication (i.e. containing more years) are also available in spreadsheet format from the following link:
www.gov.scot/Topics/Statistics/Browse/Agriculture-Fisheries/PubEconomicReport

We hope that you find the format of this publication helpful. We are always happy to hear your views on any of our statistics and publications – if you want to contact us, our details are on page ii.

We would also like to thank Scottish farmers for their continuing cooperation with all of our data collections.

Rural and Environment Science and Analytical Services (RESAS)
Scottish Government
June 2015

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web: www.gov.scot/agricstats
twitter: @SGRESAS

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Agricultural Census

1. Introduction

1.1 Overview of agriculture in Scotland in 2014

The year 2014 started with reasonably favourable weather conditions. Unlike the previous winter, the wheat and winter barley did well. The lambing season also fared much better, with a five per cent increase in lambs on 2013. The June agricultural census results showed a halt in the downward trend in the number of livestock, with increases in dairy cattle, sheep, pigs and poultry numbers, though in some cases possibly only due to this being relative to the very poor 2013.

Until the remnant of Hurricane Bertha hit in August, the summer had been an excellent one, warm but showery, with the fourth warmest June and the sixth sunniest July on record. The good weather generally extended into September, which was the second driest and fifth warmest September on record, meaning farmers generally had little difficulty bringing in the harvest. It proved to be the biggest cereal harvest ever. Unfortunately cereal prices were dropping worldwide, as were potato and milk prices, hitting the profitability of farms. The less favourable euro exchange rate applied to Single Farm Payments, and the reduction in the original payment amount, also led to smaller incomes.

The year ended with a relatively wet and stormy December. Data from the December Survey show however that winter crop areas maintained those levels seen in the previous year, helped by favourable weather in the autumn planting season.

2014 was dominated by the independence referendum debate, and by finalisation of details for the new Common Agricultural Policy (CAP) for Scotland, in particular relating to the level of coupled support covering beef and sheep, the method and length of the transition period, and the greening regulations.

The Land Reform Review Group published its findings, particularly highlighting the need for better data on land ownership. Meanwhile the Review of Agricultural Holdings Legislation also came to an end, with the results of various surveys of tenants and landlords published throughout the year, the Interim Report published in June[1], and the final recommendations, including the setting up of tenant farming commissioner, and the use of the productive capacity of a farm in setting rent levels, consulted on before publication in January 2015[2].

The total area of agricultural holdings and common grazing in Scotland at the time of the June 2014 agricultural census was 6.2 million hectares, equating to 78 per cent of Scotland's total land area. Just under sixty per cent of this comprised rough grazing (including 580,000 hectares of common grazing), with about a fifth taken up by grass, and about ten per cent used for crops or left fallow. The rest consisted of woodland, ponds, yards or other uses.

Amongst the crops grown in Scotland (excluding grass), cereals accounted for 78 per cent of the land area, with 71 per cent of that being barley (327,000 hectares). There were also considerable areas growing wheat (109,000 hectares), oilseed rape

[1] www.gov.scot/Resource/0045/00452838.pdf
[2] www.gov.scot/Publications/2015/01/5605

(37,000 hectares), oats (25,000 hectares) and potatoes (29,000 hectares). Amongst fruit and vegetables, a total of 913 hectares of strawberries were grown, mainly under cover, which was the largest source of income amongst horticulture crops (see section 4).

With the exception of cattle, livestock numbers went up in 2014, with 6.7 million sheep, 316,000 pigs and 14.7 million poultry all higher figures than the previous year (though poultry figures have tended to fluctuate around 14 million over the last 25 years (see section 5)). Despite the rises this year, longer term trends point to a decline dating back to the turn of the millennium (in the case of pigs and sheep). The number of cattle, meanwhile, fell to 1.79 million, continuing the trend seen since the mid-1970s.

Total Income from Farming (TIFF) was estimated at £823 million in 2013, being made up of £3.1 billion in outputs and £581 million in support payments, offset by £2.9 billion in costs. The initial estimate of TIFF for 2014 was £688 million, though this figure will be revised in January 2016. The decrease in 2014 relative to 2013 was linked to lower prices, particularly in cereals, which outweighed changes in volumes. The longer term trend in TIFF has been rising since the turn of the century, but with fluctuations from year to year. TIFF per annual work unit decreased to £26,000, similar to the value in 2010 (see sections 3.1 and 3.7).

Income from agriculture made up about one per cent of the Scottish economy[3].

The Farm Accounts Survey of economically active farms, based on the 2013 crop year, showed that average income remained largely unchanged in 2013-14 (decrease of £600), at £31,000, and decreased by £11,000 over the last five years. This is equivalent to a Farm Business Income (FBI) per unit of unpaid labour (those with an entrepreneurial interest in the farm business) of £21,000 (see sections 3.2).

Converting the income estimates to hourly income for unpaid labour - such as farm owners, family members and business partners - shows that the income generated from 43 per cent of businesses wouldn't have been enough to meet the minimum agricultural wage. This includes the one in five farm businesses that made a loss (see sections 3.6).

It was a mixed picture for incomes across the farming sectors with dairy, other cattle and sheep (LFA), specialist sheep (LFA) and lowland cattle and sheep businesses showing an increase in income and general cropping, mixed, specialist cattle and cereals all showing a decrease (see summaries in sections 4 and 5). Dairy farms had by far the highest average FBI in 2013-14 at £80,000, with other farm types averaging between £36,000 and £23,000.

The figures suggest that some farm businesses rely on sources of income other than from farming, including: contracting work; hosting mobile phone masts; provision for tourism and recreation; and financial support from grants and subsidies. Analysis of the Farm Accounts Survey suggests that, excluding support from grants and subsidies, the average farm made a loss of £16,000 in 2013. However, calculations

[3] Gross Value Added (GVA)

from TIFF suggest that, excluding support, the agriculture sector as a whole still made a small profit (see sections 3.1, 3.3 and 6).

1.2 Previous publication of these data

The main results for each of the collections have already been published on the Scottish Government website at the following locations

June Census results
www.gov.scot/stats/bulletins/01117
December Survey results
www.gov.scot/stats/bulletins/01144
Total Income from Farming
www.gov.scot/stats/bulletins/01138
Farm Accounts Survey results
www.gov.scot/Publications/2015/03/9632
Tenanted Land statistics
www.gov.scot/stats/bulletins/01155

Since publication, minor revisions have been made to the June Census and Total Income from Farming results. Please note that, given that the changes are small and do not have an impact on any overall trends or messages, we have not amended the original headline statistical publications, though any changes made are incorporated into this publication.

The initial estimate of TIFF is always updated the following year to include more complete data, including any revisions in previous years due to changes in methodology. In January 2015 we published initial TIFF estimates for 2014, along with revised estimates for previous years. Where revisions have been made, they have been applied retrospectively to ensure comparability across years. The 2014 initial estimates will be revised in the January 2016 publication, along with previous years where necessary. Likewise, Farm Accounts Survey results will be revised slightly when next published in 2016.

1.3 Publication notes

Due to rounding, some totals may not agree with the sum of their constituent parts.

The following symbols are used in this publication

: not available/not collected
c too few farms involved to publish
z not applicable

2. Geography and Structure

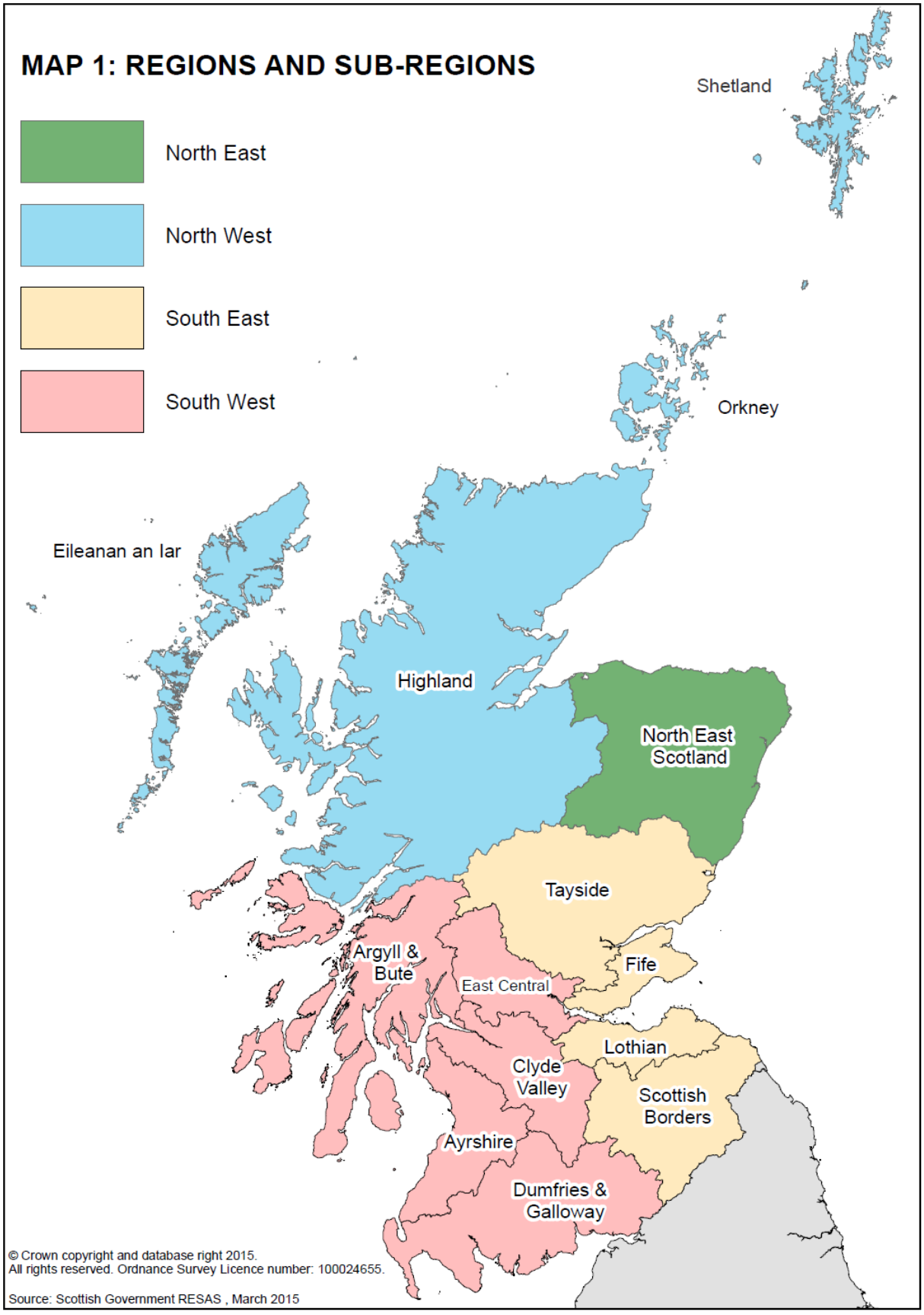
2.1 Geographical areas (Map 1)

Each agricultural holding is allocated to one of the 891 parishes in Scotland, ranging in area from about 60 hectares to 113,000 hectares. These parishes can then be aggregated up to the higher geographies like local authority (LA), sub-region (groupings of LAs) and region. The table below presents which local authorities lie within each region and sub-region.

Most, though not all parishes lie wholly within a single LA area. Where a parish straddles LA boundaries, the whole parish is assigned to the LA in which the majority of the parish's area is located.

Regions, Sub-regions and Local Authority Areas

Region	Sub-regions	Local Authority
North West	Shetland	Shetland
	Orkney	Orkney
	Eileanan an Iar	Eileanan an Iar
	Highland	Highland
North East	Grampian	Aberdeen City Aberdeenshire Moray
South East	Tayside	Angus Dundee City Perth & Kinross
	Fife	Fife
	Lothian	East Lothian City of Edinburgh Midlothian West Lothian
	Scottish Borders	Scottish Borders
South West	East Central	Clackmannan Falkirk Stirling
	Argyll & Bute	Argyll & Bute
	Clyde Valley	East Dunbartonshire East Renfrewshire City of Glasgow Inverclyde North Lanarkshire Renfrewshire South Lanarkshire West Dunbartonshire
	Ayrshire	East Ayrshire North Ayrshire South Ayrshire
	Dumfries & Galloway	Dumfries & Galloway


MAP 1: REGIONS AND SUB-REGIONS
North East
North West
South East
South West
Shetland
Orkney
Eileanan an Iar
Highland
North East Scotland
Tayside
Fife
Argyll & Bute
East Central
Lothian
Clyde Valley
Scottish Borders
Ayrshire
Dumfries & Galloway
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Source: Scottish Government RESAS , March 2015

2.2 Less Favoured Area (LFA) (Map 2 and table C3)

A holding is classified as Less Favoured Areas (LFA) if 50 per cent or more of its land is assessed as being disadvantaged, i.e. likely only to be able to support low intensity farming. Map 2 shows the distribution of agricultural land that is classified as LFA. It can be seen that the vast majority of Scotland's agricultural land is classified as "severely disadvantaged LFA", reflecting the large areas of upland farmland in Scotland. Non-LFA land tends to be located to the east of the country in coastal areas.

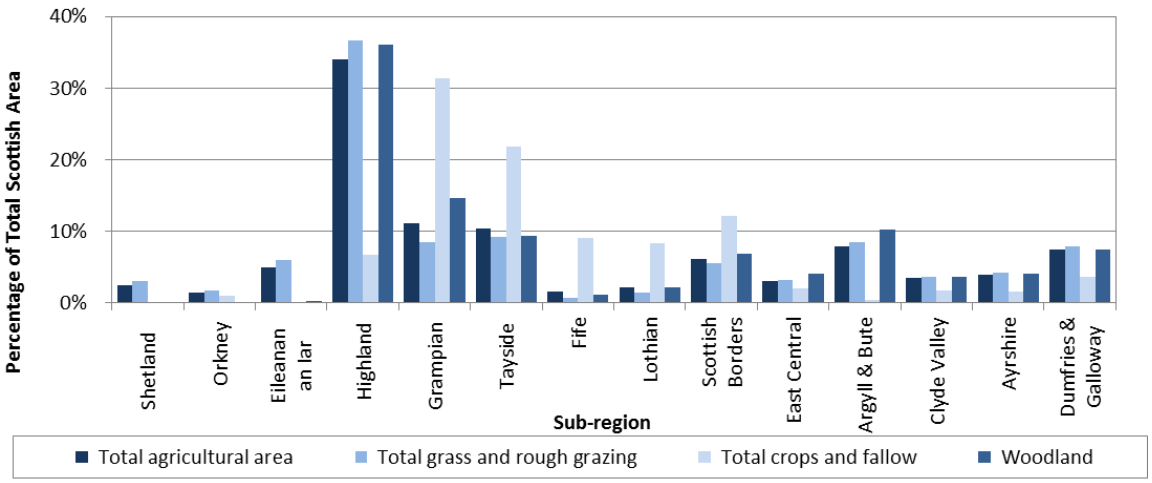
Table C3 gives a breakdown of land-use by whether it is LFA or not. It shows that in 2014 there were 5.33 million hectares of land located on LFA holdings, accounting for 86 per cent of all agricultural land in Scotland (including common grazing). Almost all rough grazing (99 per cent or 3.61 million hectares) was located on LFA holdings, with high proportions of woodland (87 per cent or 415,000 hectares) and other land (91 per cent or 147,000 hectares) also being located on these holdings. Just under 80 per cent (1.04 million hectares) of grass was located in LFA areas.

By contrast, Table C3 also shows that crops were mainly located on non-LFA holdings. In particular, 80 per cent of crops (excluding grass and fallow, 460,000 hectares) were on non-LFA holdings. The only crops mainly located on LFA holdings were turnips, swedes and beet for stock-feeding (51 per cent on LFA holdings or 2,300 hectares) and other crops for stock-feeding (73 per cent on LFA holdings or 10,200 hectares).

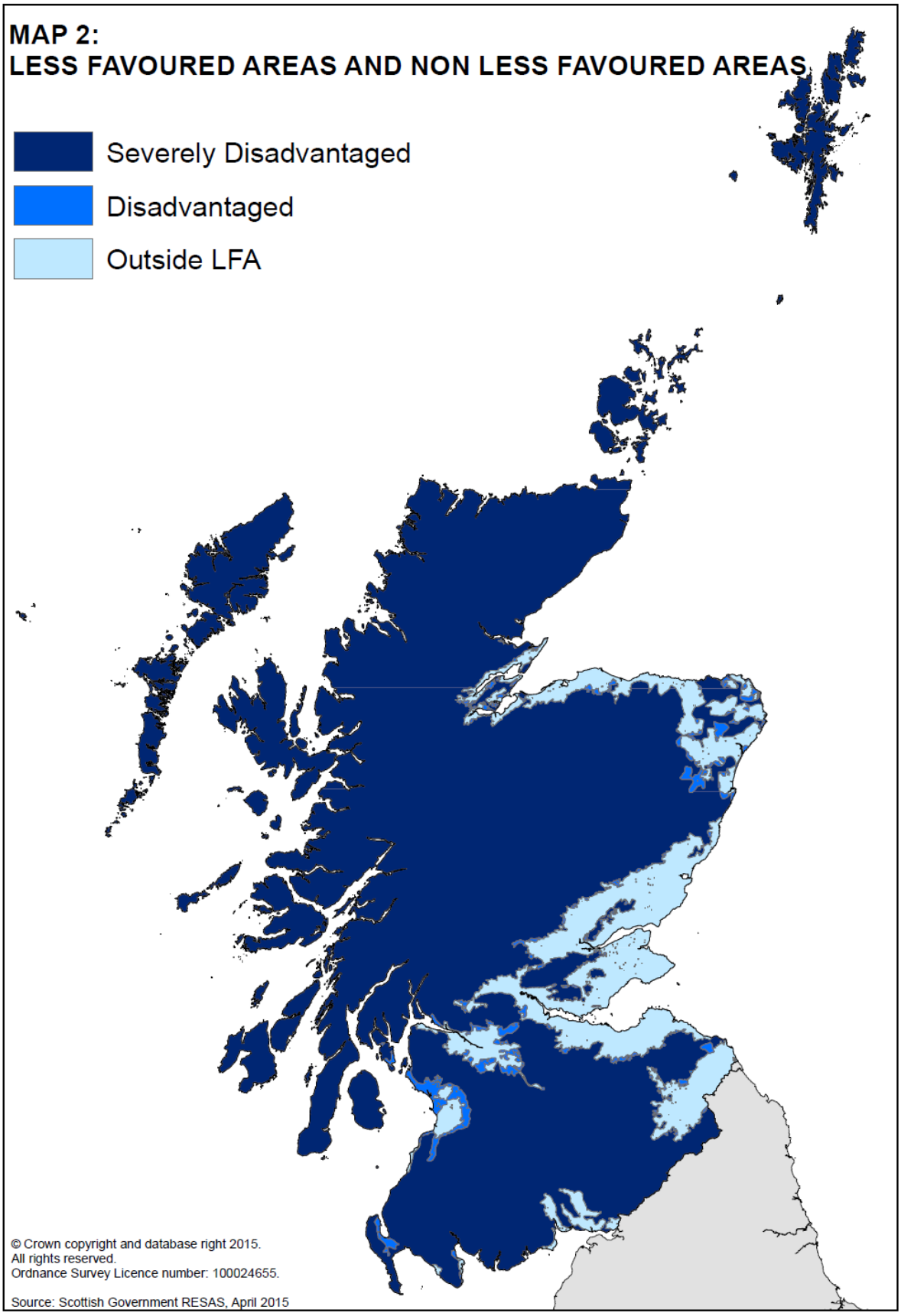
2.3 Land use by sub-region (Table C4)

Table C4 presents land use by the four regions and 14 sub-regions (as presented in Map 1). Chart 2.1 highlights that Highland understandably had the largest share of Scotland's agricultural land, it being the largest area, with 2.10 million hectares (34 per cent), followed by Grampian (11 per cent) and Tayside (ten per cent). Highland also had by far the largest share of grass and rough grazing, and of farmed woodland (both accounting for around 36 per cent of Scotland's total).

Chart 2.1: Distribution of total agricultural area and other land-types by sub-region, June 2014



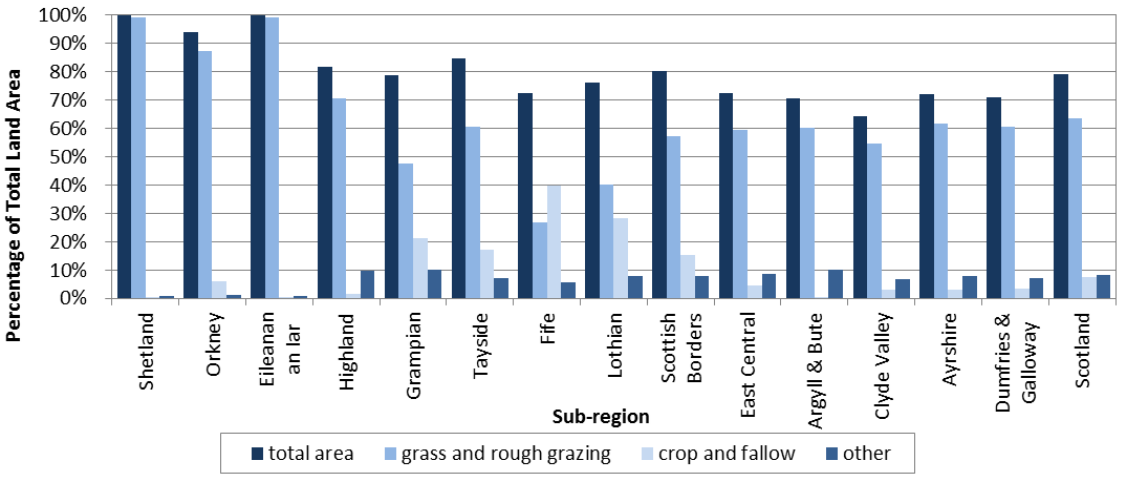
MAP 2:
LESS FAVOURED AREAS AND NON LESS FAVOURED AREAS



Source: Scottish Government RESAS, April 2015

However, taking into account the size of these sub-regions, chart 2.2 shows that the islands have the largest proportion of their land in agricultural use, with nearly 100 per cent on Shetland and Eileanan an Iar, and over 90 per cent on Orkney. The lowest percentage was in the Clyde Valley, where 64 per cent was in agricultural use.

Chart 2.2: Proportion of area in agricultural use, and by type, June 2014



The two charts also show that Grampian and Tayside had the largest share of crop and fallow land in Scotland (31 per cent and 22 per cent of Scotland's total respectively), with Fife and Lothian having the largest proportions of their land as crop or fallow (40 per cent and 28 per cent respectively). By contrast very small areas of land were used for crops and fallow on Shetland, Eileanan an Iar and in Argyll and Bute. See section 4.1 for more detailed breakdown of these categories.

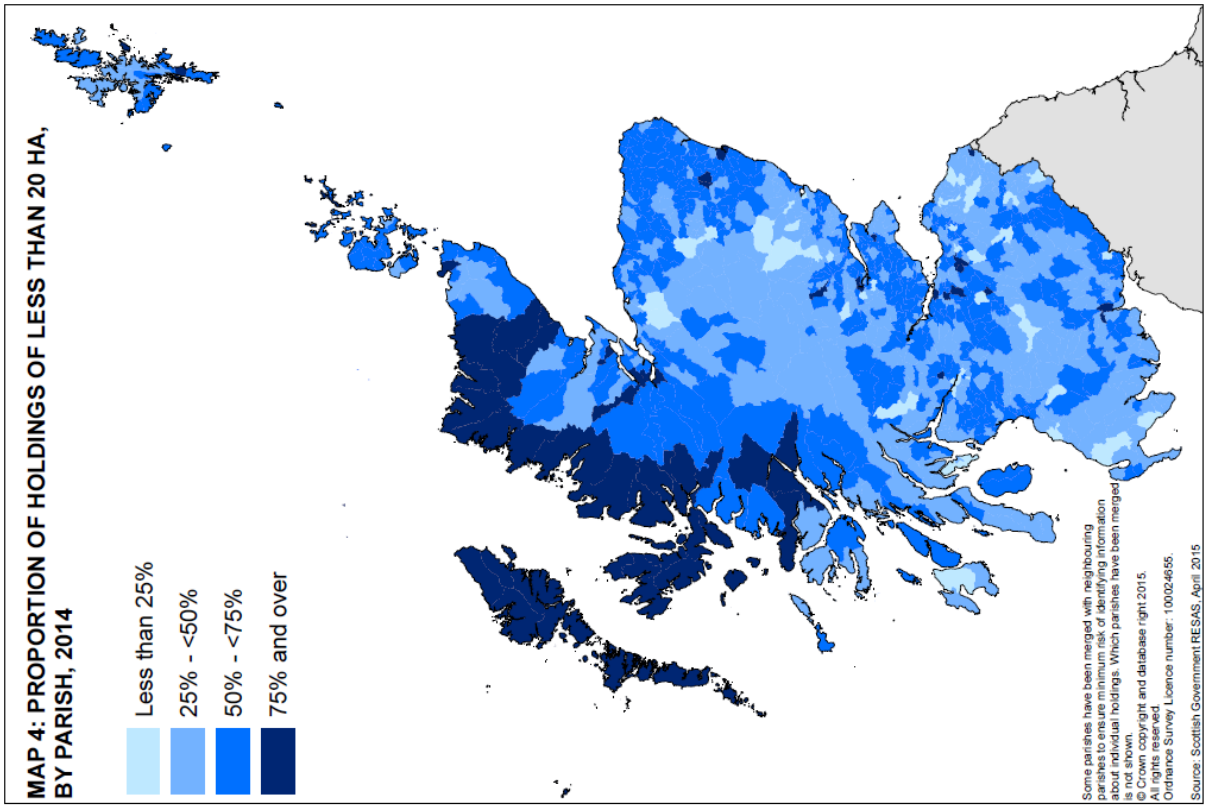
2.4 Distribution of holdings and agricultural area by farm size and region

(Tables C5, C6)

The distribution of agricultural area between holdings in Scotland is highly skewed, with a relatively small number of very large holdings accounting for a high proportion of the area. Nine per cent of holdings accounted for 76 per cent of land (4,497 holdings of 200 hectares or over in size, with 4.26 million hectares of area between them). Conversely, 52 per cent of holdings accounted for 1.6 per cent of the total land (27,317 holdings of less than ten hectares in size, with 90,456 hectares of land). These patterns can be seen by comparing chart 2.3 and 2.4.

Large holdings, of 200 hectares and over, were most prevalent in Scottish Borders (23 per cent of all holdings in the Scottish Borders), Argyll and Bute (20 per cent) and Tayside (14 per cent). Just over half (54 per cent) of holdings over 200 hectares were cattle & sheep (LFA) farms with extensive areas of rough grazing.

Smaller holdings, of under ten hectares, were prevalent in Eileanan An Iar (84 per cent of their holdings) and Highland (62 per cent), reflecting the high number of small farms and crofts in these areas.


MAP 4: PROPORTION OF HOLDINGS OF LESS THAN 20 HA, BY PARISH, 2014
Less than 25%
25% - <50%
50% - <75%
75% and over
Some parishes have been merged with neighbouring parishes to ensure minimum risk of identifying information about individual holdings. Which parishes have been merged is not shown.
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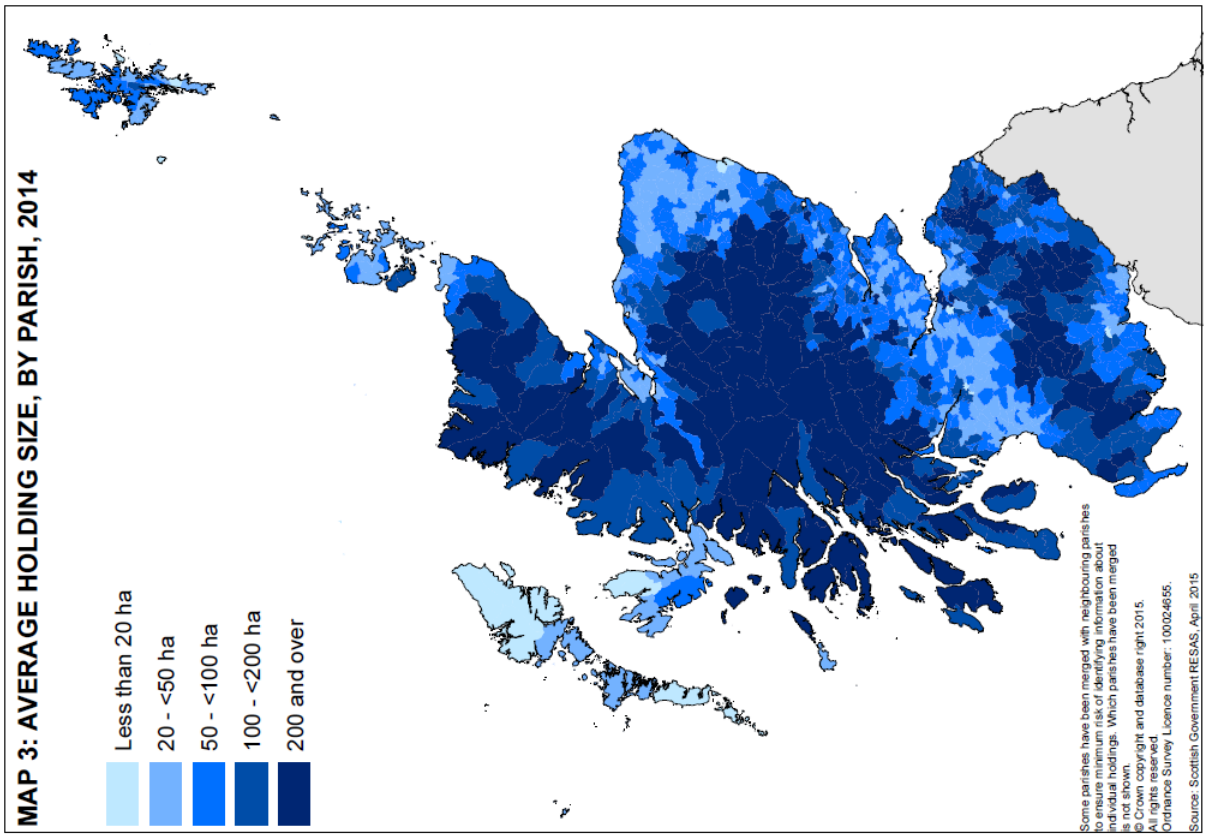
Source: Scottish Government RESAS, April 2015


MAP 3: AVERAGE HOLDING SIZE, BY PARISH, 2014
Less than 20 ha
20 - <50 ha
50 - <100 ha
100 - <200 ha
200 and over
Some parishes have been merged with neighbouring parishes to ensure minimum risk of identifying information about individual holdings. Which parishes have been merged is not shown.
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Source: Scottish Government RESAS, April 2015

Chart 2.3 illustrates this, with holdings in the North West being skewed, with far more smaller holdings than larger ones in comparison to other regions; however it also has some particularly large holdings (mainly LFA cattle & sheep or forage holdings), as illustrated in chart 2.4.

Chart 2.3: Number of holdings by region and holding size, June 2014

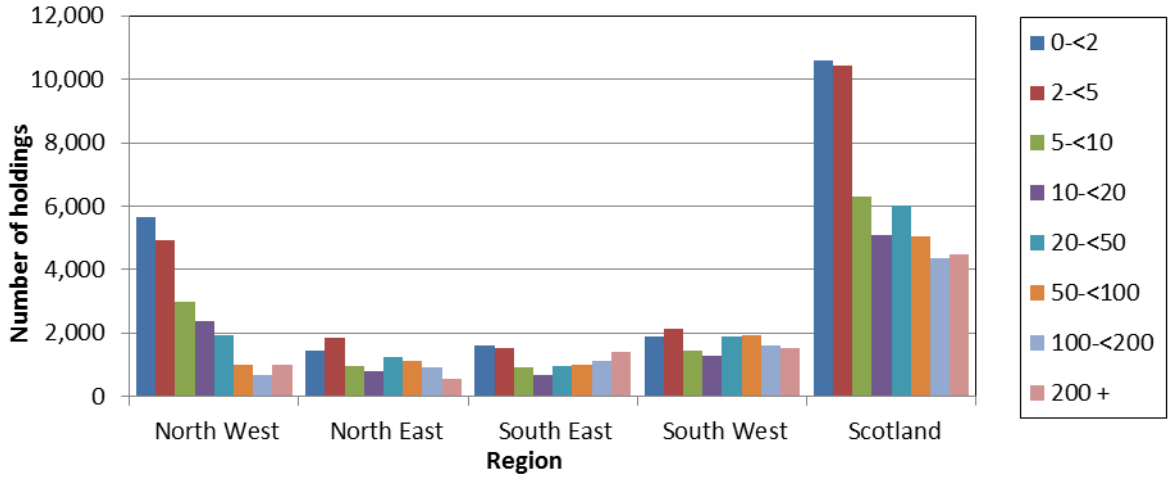
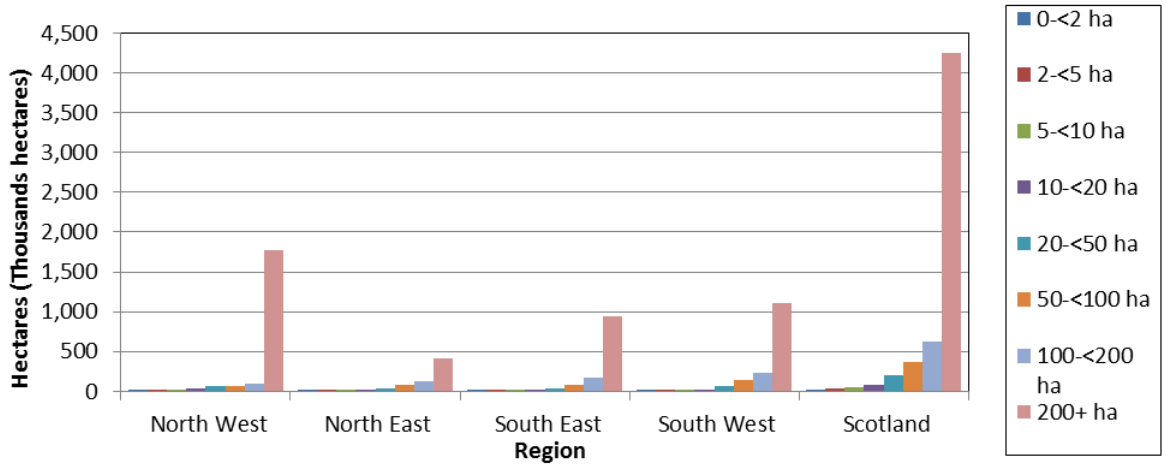


Chart 2.4 Agricultural area by region and holding size, June 2014



Maps 3 and 4 also demonstrate how the farm size distribution differs across Scotland, with the average size of a holding away from the coast and the central belt being over 200 hectares, and a high proportion of holdings on the north-west coast and in Eileanan An Iar and Skye being of less than 20 hectares.

2.5 Standard Outputs and farm types (Maps 5 and 6 and tables C1 and C23)
Standard Outputs (SO) represent the notional farm-gate worth generated by a holding's crops and livestock and is calculated by applying multipliers (in £s) to all crop areas and livestock units. These multipliers are applied uniformly across Scotland. The multipliers used in this publication are based on a five year average, centred around the year 2007, and these have been applied to the 2014 crop areas and livestock units of holdings.

Using results from the June Agricultural Census, holdings are classified into farm types, which are allocated if the contribution of a specific farming activity accounts for at least two-thirds of a holding's total SO value.

There are eleven basic farm types (cereals, general cropping, horticulture & permanent crops, specialist pigs, specialist poultry, dairy, cattle & sheep (LFA), lowland cattle & sheep, mixed, forage, and other). 'Other' relates to holdings with no SO value (e.g. holdings with fallow land only), whereas 'mixed' is where no single crop or livestock category accounts for two-thirds. However the same calculation can be used to subdivide the categories further, and so this publication also includes analysis (in the Farm Accounts Survey results) of cattle & sheep (LFA) farms split into three categories; specialist beef (LFA), specialist sheep (LFA), and other cattle & sheep (LFA). Please do not confuse the latter with the overall cattle & sheep (LFA) category.

This SO methodology is implemented in line with EC requirements and was first used in the June 2013 Agricultural Census. More information on the change to SOs and the new typology can be found in the Economic Report for Scottish Agriculture, 2013 Edition[4].

The geographic distribution of these farm types is presented in Map 5. It should be noted that this map shows a generalised view by parish rather than by holding, with a parish being allocated the farm type of whichever farm type SO total within the parish is the largest. We have also included the 'specialist forage' farm type featured in table C1 as it relates to a large number of holdings, however this farm type does not feature much in Map 5 as this activity has a relatively low SO value.

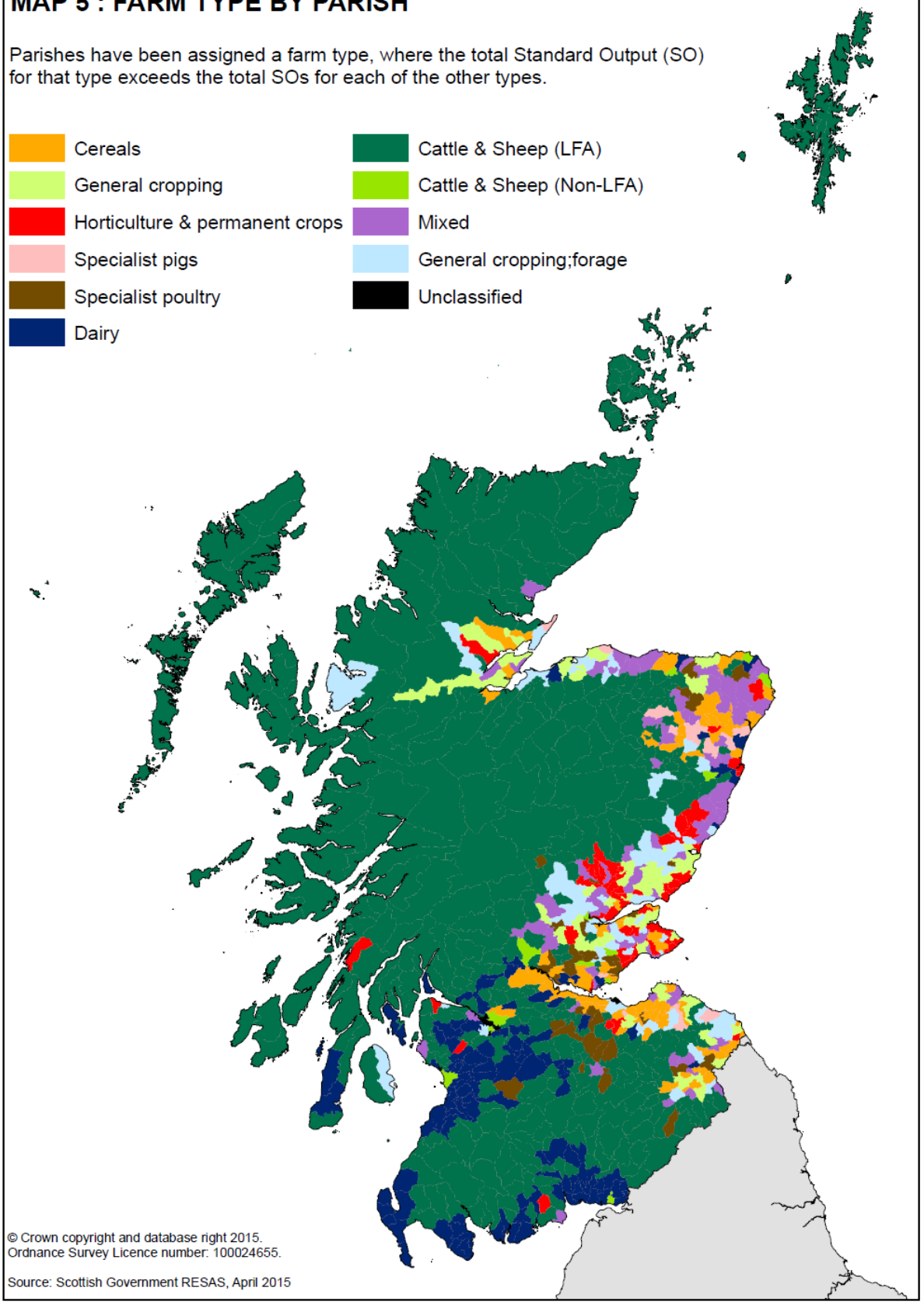
While Map 5 shows what the most common type of activity is in a given area, it should not be taken to illustrate where activities most commonly take place. It may correctly imply that cereal farming is generally in the east, but it would be wrong to infer that cattle and sheep are more prevalent in the Highlands. Maps 10 and 11 show that both cattle and sheep are more generally found south of the central belt and in Grampian – cattle and sheep only dominate in the north-west because there is comparatively little other farming activity there.

Table C23 presents information on each of the main farm types in Scotland, showing the total number of holdings, total agricultural area and total size in terms of SOs (Standard Outputs) and SLRs (Standard Labour Requirements, see section 7.3). The most common farm type was 'specialist forage' which totalled 22,310 holdings. This was followed by cattle & sheep (LFA) (14,327 holdings) and mixed holdings (5,498). Lowland cattle & sheep and cereal farms were fairly prevalent (with around 2,500 holdings each). General cropping, poultry and dairy farms numbered around 1,000 each, while horticulture and pig holdings were the least common farm types.

[4] www.gov.scot/Publications/2013/06/5219/12

MAP 5 : FARM TYPE BY PARISH

Parishes have been assigned a farm type, where the total Standard Output (SO) for that type exceeds the total SOs for each of the other types.

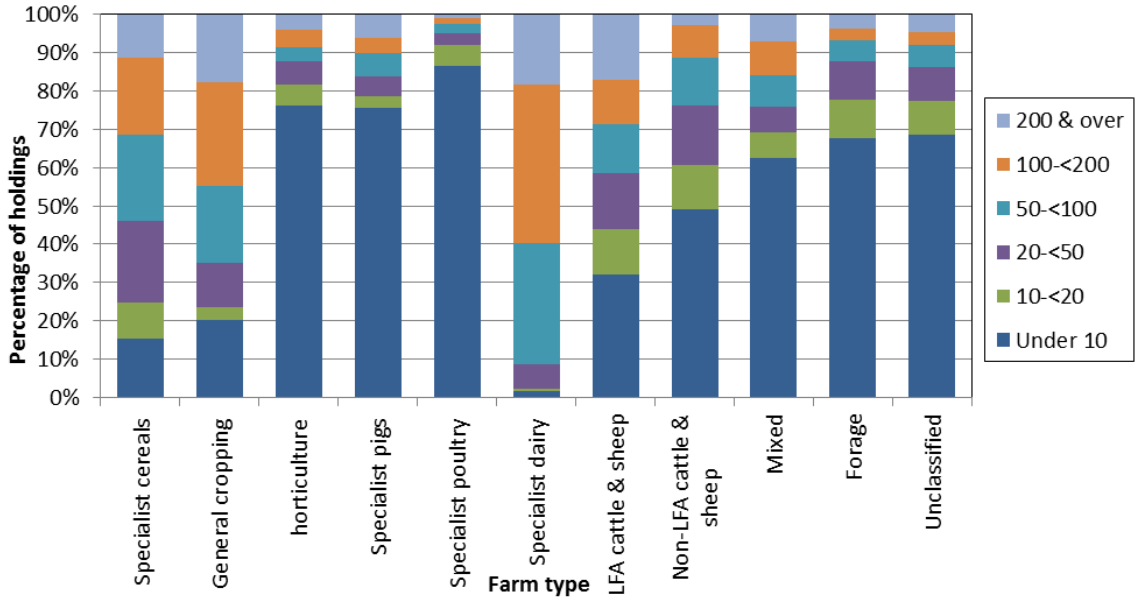


Source: Scottish Government RESAS, April 2015

2.6 Size of holdings by farm type (Table C7)

Table C7 and chart 2.5 show that farm size distribution also varied within each farm type. The majority of specialist poultry (87 per cent), horticulture (76 per cent), pigs (75 per cent), unclassified (69 per cent), forage (68 per cent) and mixed holdings (63 per cent) were below ten hectares in size. With the exception of mixed, forage, and unclassified holdings, this trend is largely associated with the intensive nature of production among these farm types.

Chart 2.5: Specialist farm types by holding size, June 2014



The majority of dairy (91 per cent), general cropping (65 per cent) and cereal (54 per cent) holdings were 50 hectares or greater in size, reflecting the tendency of activity in these sectors to be carried out by larger producers.

The distribution of cattle & sheep (LFA) holdings by farm size also shows a varied mix, incorporating large extensive holdings, small holdings and crofts. This tendency is largely determined by geography, with a tendency for smaller cattle & sheep (LFA) holdings to be concentrated in the north-west and larger ones in the south-west.

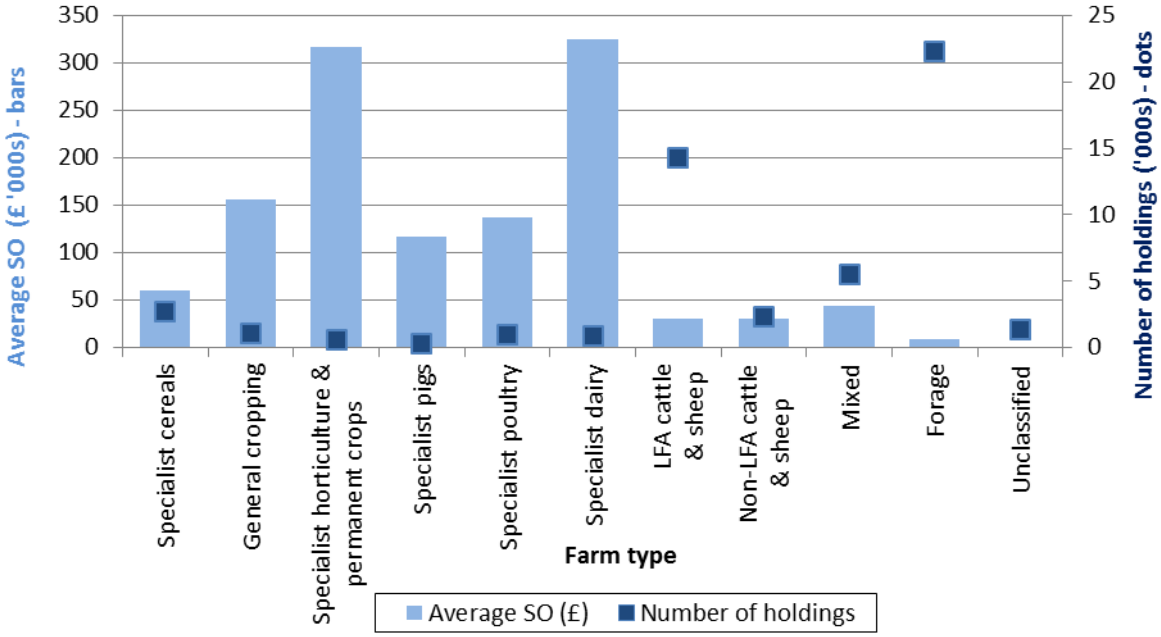
2.7 Standard Outputs by farm type (Table C23, C25)

Chart 2.6 shows that dairy holdings had the highest average SO at £324,581. This was followed by horticulture (£316,559), some way ahead of general cropping (£155,451) and poultry (£137,084). Other than unclassified holdings (which generate no Standard Output value), forage holdings had the lowest average SO (£8,560). Lowland cattle & sheep (£30,673), and LFA cattle & sheep (£30,915) holdings also had relatively low average SO values. Remember that the figures here are only of value for comparison, since they are based on standard values from 2007.

It should be noted, however, that for most farm types these results are derived from a large number of holdings with a small amount of agricultural activity and a few very large holdings with a large amount of activity. The number of holdings are illustrated in chart 2.6 by the dark blue dots. It should also be noted that, since SOs do not take

into account costs, those farm types that have relatively high costs per output will appear to be faring differently, relative to other farm types, than would be the case if costs were also included.

Chart 2.6: Average Standard Output by farm type, June 2014



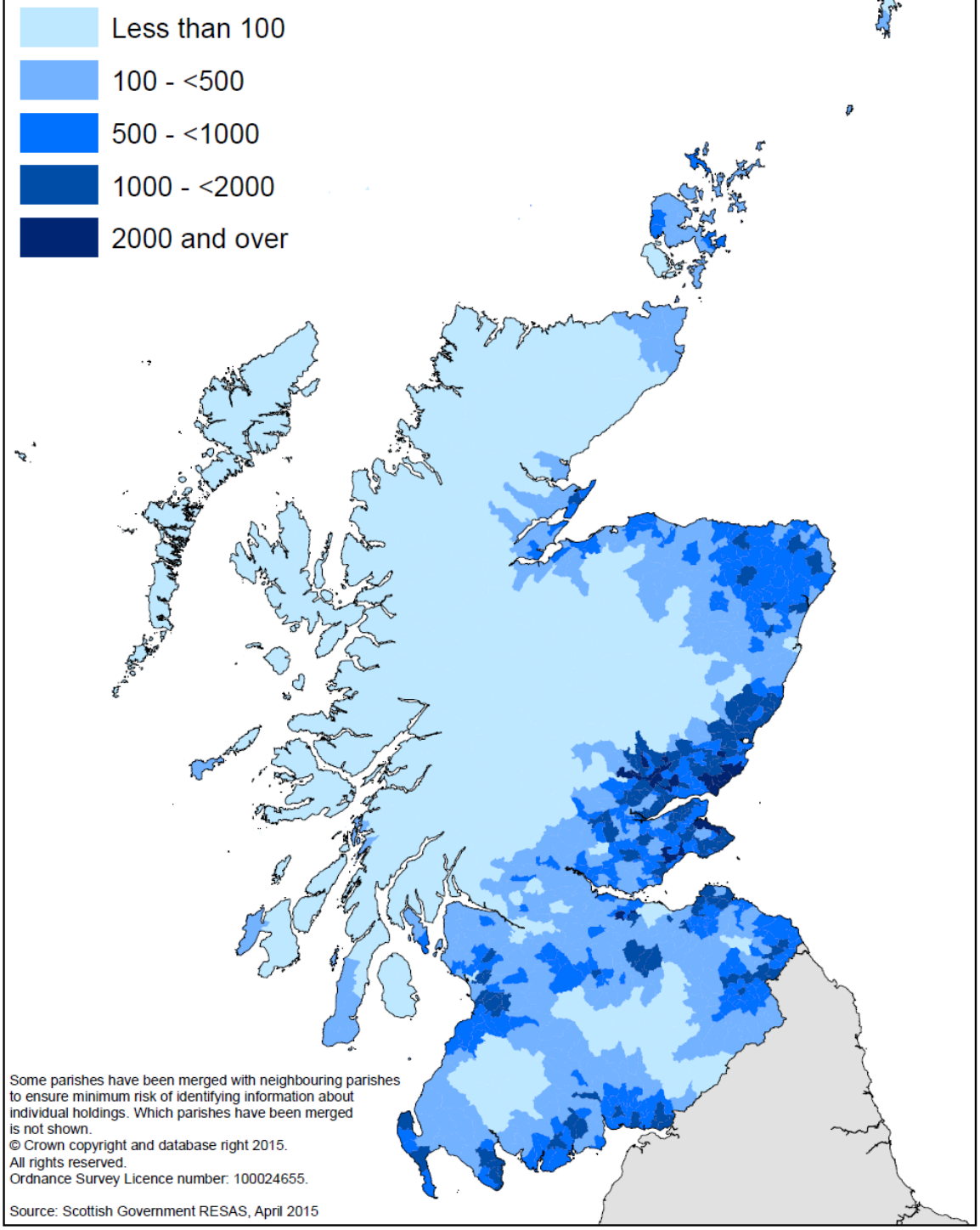
Looking at the total contribution each farm type made to total SOs in Scotland, table C23 (see also chart 7.6) shows that cattle & sheep (LFA) and dairy holdings accounted for the largest shares of SO (23 per cent and 15 per cent respectively, though they account for 27 per cent and only two per cent of the holdings) followed by mixed holdings (12 per cent), forage and horticulture and permanent crops (both ten per cent). All other farm types each contributed less than ten per cent to total SO.

Table C25 (and chart 7.7) show that Tayside and Grampian contributed most to Scotland's total SO, both accounting for around 20 per cent each, followed by Dumfries and Galloway (14 per cent). All other sub-regions each contributed less than ten per cent of the total. This partly reflects the farm type distributions in these sub-regions as well as the size of these geographical areas.

Map 6 shows the average SO per hectare for each parish. It illustrates the higher output in the east, and along and to the south of the central belt.

MAP 6: AVERAGE STANDARD OUTPUT, PER HECTARE BY PARISH, 2014

Standard Output represents the estimated farm-gate worth (£s) of crops and animals without taking account of the costs incurred in production.

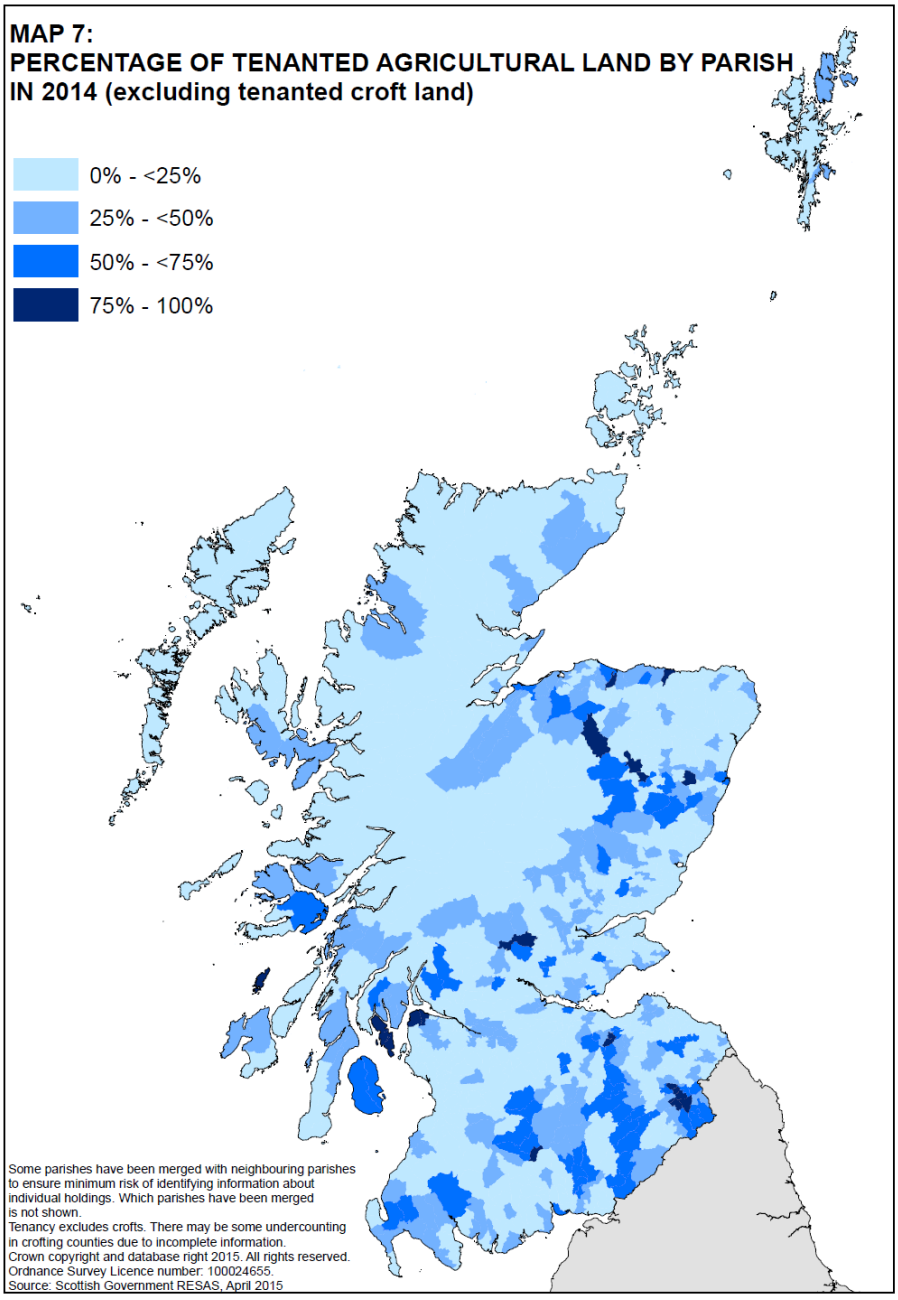


Some parishes have been merged with neighbouring parishes to ensure minimum risk of identifying information about individual holdings. Which parishes have been merged is not shown.

Source: Scottish Government RESAS, April 2015

2.8 Rented land (Table C28)

Just under a quarter of agricultural land in Scotland was rented under a lease lasting one year or more; about 1.33 million hectares. This proportion of land has fallen steadily over time. However, in recent years, this reduction has been offset, in numerical terms at least, by a general increase in seasonal let land, which now accounts for 0.77 million hectares, or 13 per cent of agricultural land. There was a fall in both categories of rented land in 2014.



Map 7 shows the geographic distribution of tenanted land (excluding crofts). Tenanted land was more prevalent south of the central belt, in Angus and Moray, and around the mouth of the Clyde.

More detailed information on tenancies is available in the separate publication, please see www.gov.scot/stats/bulletins/01155.

3. Farm Income

There are two main farm income measures contained in this publication. They are closely related and provide complementary information. Total Income from Farming (TIFF) provides a national estimate of total income across the sector as a whole, with a breakdown of the national value of farm outputs, costs and subsidies. Farm Business Income (FBI) provides a sectorial insight into the incomes of farm businesses for eight different farm types, with estimates of average incomes, outputs, costs and subsidies.

For example, the difference in the way TIFF and FBI are calculated can be seen by considering cereals:

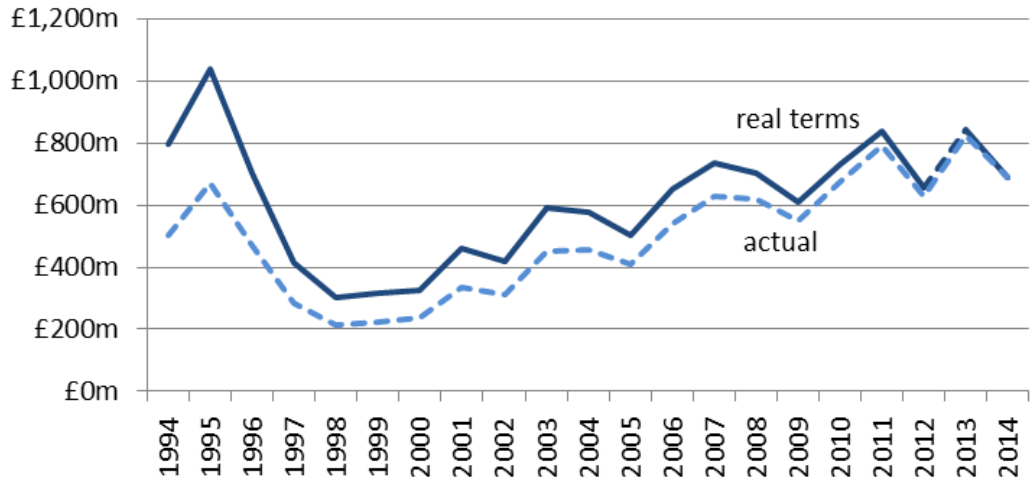
- TIFF estimates the income from cereals across all farms-types to be £381 million. This is gross income from the sale of grain, and does not take into account any of the costs of production, such as seed, and includes all sales irrespective of whether from a specialist cereal farm or a mixed cropping farm or something else. Separately then, TIFF would also calculate, for example, estimates for the cost of seed across all types of farms, about £79 million, as well as all other categories of outputs and costs.
- FBI by comparison produces an estimate of average income on cereal farms of £23,000 per farm, including all the income from those farms, whether from their cereals, other crops or anything else, and taking into account all of their costs.

For more detail please see www.gov.scot/stats/bulletins/01138 and www.gov.scot/Publications/2015/03/9632.

3.1 Total Income from Farming (TIFF) (Table A1)

TIFF is the headline national-level measure of farm income, or profit. The total net income from farming is calculated using a range of data covering each factor of output and cost for Scottish agriculture. This means obtaining volume and price data for each type of crop and livestock, collecting data on income from other sources, and estimating the cost of each aspect of production, e.g. seed, feed, fuel, or labour.

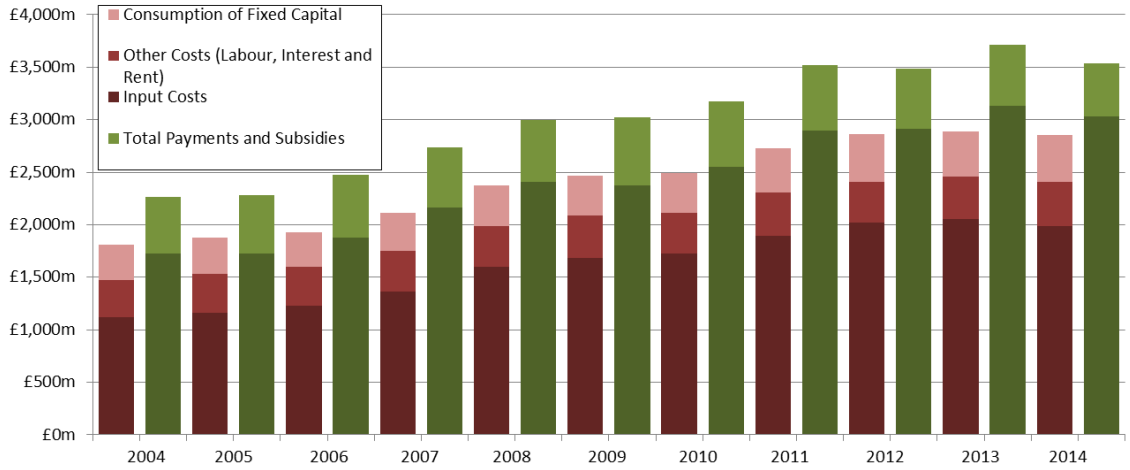
Chart 3.1: Total Income from Farming (in real terms) 1994 to 2014



Over the past ten years there has been a general upward trend in TIFF, which has increased by £231 million (51 per cent or 19 per cent in real terms) since 2004, from £457 million in 2004 to a provisional estimate of £688 million in 2014. The estimate for 2014 suggests that TIFF decreased by £136 million (17 per cent or 18 per cent in real terms) from 2013, after an increase of £194 million (31 per cent or 28 per cent in real terms) between 2012 and 2013. The value of TIFF is greater than the value of subsidies, suggesting the industry would still make a small profit without them. This, however, is not the same as the findings of the Farm Accounts Survey (compare section 3.3, see also chart 6.2).

Chart 3.2 shows the contributing components of TIFF, with output and total payments and subsidies showing the positive contribution and input costs, other costs and consumption of fixed capital showing the negative contribution. Initial estimates for 2014 were outputs at £3.03 billion, support at £511 million, and costs of £2.85 billion.

Chart 3.2: Contributing components of TIFF 2004 to 2014 (actual prices)



Since 2004 the output value (net of subsidies[5]) from agricultural businesses has increased by £1,307 million (76 per cent, 39 per cent in real terms), and total payments and subsidies have decreased £30 million (six per cent, or 25 per cent after accounting for inflation). Over the same period, total costs have risen by £1,046 million (58 per cent, or 25 per cent relative to general inflation).

The overall value of TIFF is calculated as the small difference between the large values of gross income and costs. This makes it quite sensitive to small percentage changes in these larger values. Between 2013 and 2014, gross income decreased by £103 million (three per cent) and costs decreased by £36 million (one per cent). These small percentage changes resulted in a decrease in TIFF of £136 million (17 per cent, or 18 per cent in real terms) between 2013 and 2014.

3.2 Farm Business Income (FBI) (Table B2)

Farm Business Income (FBI) is the headline business-level measure of farm income, or profit, providing data for each farm type (TIFF estimates only provide information

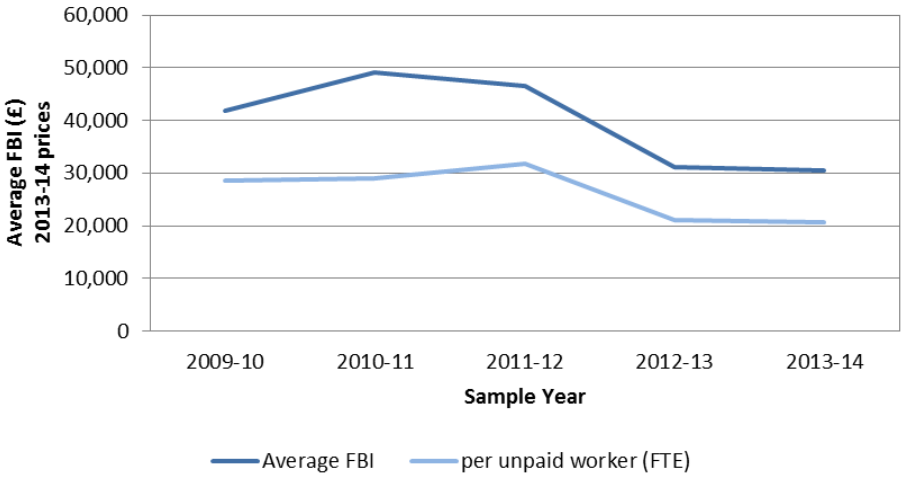
[5] Note: chart 3.2 groups all grants and subsidies together, whereas coupled payments are often included with outputs. See Table A1.

for the sector as a whole). FBI represents the return to the whole farm business, that is, the total income available to all unpaid labour and their capital invested in the business. Returns from diversified activities (non-agricultural activities that use farm resources, for example: renting out farm cottages for tourism; income from small-medium scale wind turbines; etc.) are included in overall FBI (as they are in TIFF). In Scotland, the data used to calculate FBI comes from the Farm Accounts Survey (FAS). The FAS represents economically active farms (using at least half the average labour requirement of a crop or livestock enterprise – see SLR definition in section 7.3). The FAS therefore excludes many small holdings. Horticulture, pigs and poultry farms are also excluded, whereas, since TIFF uses national data, it includes all farm types.

Scottish FBI figures for farms classified into types by standard outputs (see section 2.5) are available from 2009-10, up to the latest year available of 2013-14, based on the 2013 crop year. Unless stated otherwise time series are presented in 2013-14 prices, using the GDP (Gross Domestic Product) all items index, adjusted to represent the period covered by each year of the Farm Accounts Survey (FAS). This provides more reliable trends as the effects of inflation are accounted for. The Net Farm Income measure provides a longer time series and is presented by farm type in section 3.12. The difference between FBI and NFI is explained in the FAS methodology and quality note, along with other information on the survey methodology and quality of results, on the agriculture statistics web page[6]. More detailed data tables are also available in the 2013-14 FAS data tables[7] also on the agriculture statistics web page.

Chart 3.3 below shows that in 2013-14 FBI fell to its lowest level over the last five years, at £31,000. This has remained relatively unchanged from the previous year. Incomes were mixed across all farming sectors which saw general cropping, specialist cattle (LFA) and mixed farm businesses showing a decrease in income and dairy, specialist sheep (LFA), specialist cattle and sheep (LFA), lowland cattle and sheep all showing an increase (on average) (see section 5.3.7 and 5.3.8).

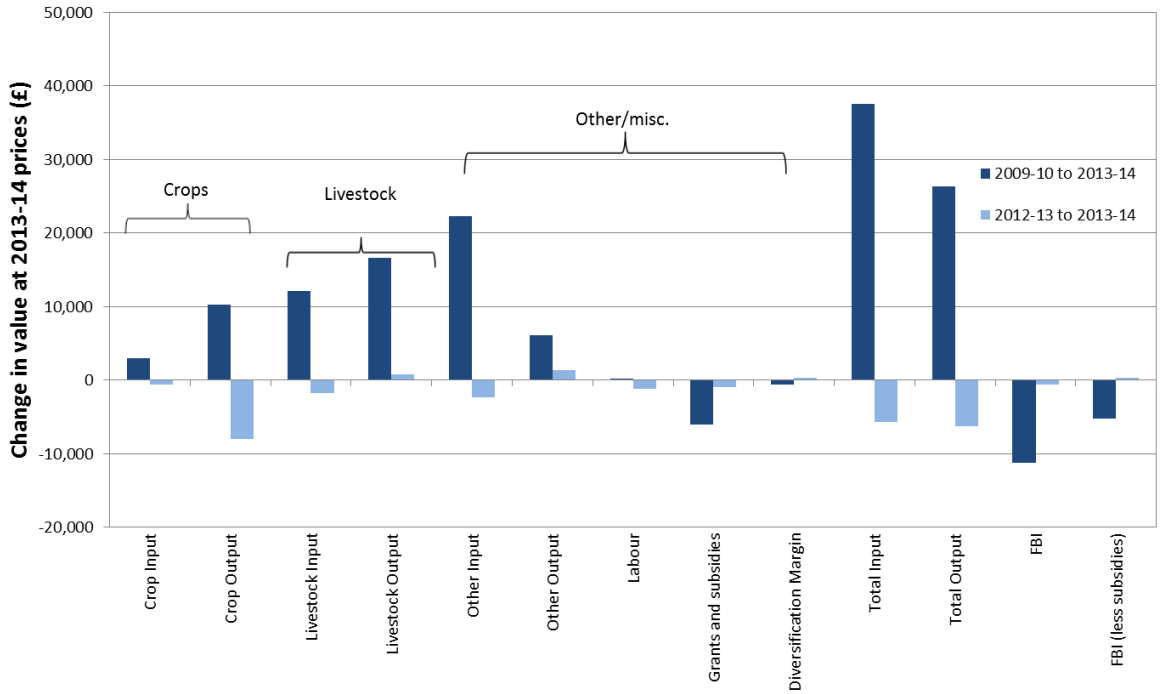
Chart 3.3: Average FBI of Scottish farms, 2009-10 to 2013-14



[6] www.gov.scot/Topics/Statistics/Browse/Agriculture-Fisheries/Publications/FASmethod
[7] www.gov.scot/Topics/Statistics/Browse/Agriculture-Fisheries/Publications/FASdata

Incomes were highest in 2010-11, at £49,000, largely due to lower input costs. Along with a rise in output values, fertiliser costs fell after a large increase in the previous year. This allowed the FBI of specialist cereal and general cropping farms to recover from low levels in 2009-10 (see sections 4.2.2 and 4.4).

Chart 3.4: 2013-14 Changes to FBI components: all farm types



Source: online FAS data tables

In 2013-14 the average FBI of Scottish farms was relatively unchanged (fall of £600) at £31,000, compared to 2012-13.

Chart 3.4 shows the average changes to FBI components both in the last year and over the last five years, accounting for inflation. Over the last year, 2012-13 to 2013-14, both crop inputs and outputs have both fallen. Livestock production costs and the value of grants and subsidies also fell, with the output value from livestock rising.

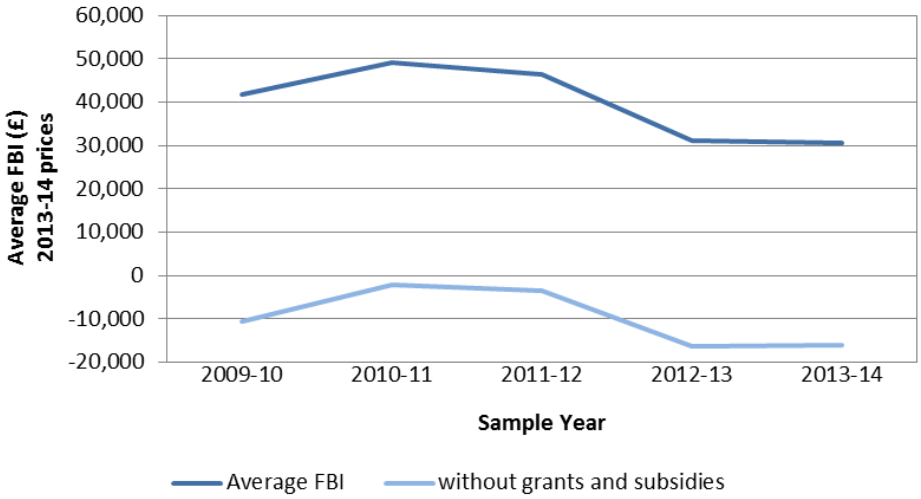
It is the decline in crop output value which has contributed the most to the decline in profitability of Scottish farm businesses in 2013-14. This can possibly be explained by poor weather conditions during the 2012-13 winter which resulted in a reduction in the area of winter crops sown.

While output values have improved over the longer term these have been outweighed by a rise in input costs (in particular “other” costs such as machinery, land and buildings, depreciation, and miscellaneous costs) combined with a declining average value of grants and subsidies. Labour costs are largely unchanged when compared over five years, but have fallen by £1,000 over the last year.

3.3 Grants and subsidies (Table B2)

Chart 3.5 shows the overall impact of grants and subsidies on the average income of farm businesses. The average FBI falls below zero when grants and subsidies are excluded. In each of the last five years FBI without grants and subsidies has been negative. In 2013-14, this figure was -£16,000.

Chart 3.5: Average FBI of Scottish farms without grants and subsidies, 2009-10 to 2013-14



The difference in the messages about the profitability of agriculture without subsidies between TIFF (chart 3.2) and FAS data (chart 3.5) may be at least partly explained by the absence from FAS of the pig, poultry and horticulture sectors. These attract relatively little in the way of subsidies but do contribute to the profitability. However this is unlikely to fully explain such a large difference.

3.4 Income distributions (Tables B4, B8)

Chart 3.6: FBI distribution 2013-14

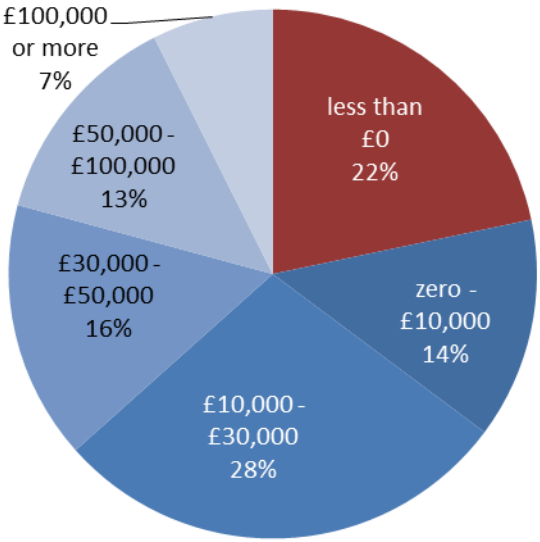
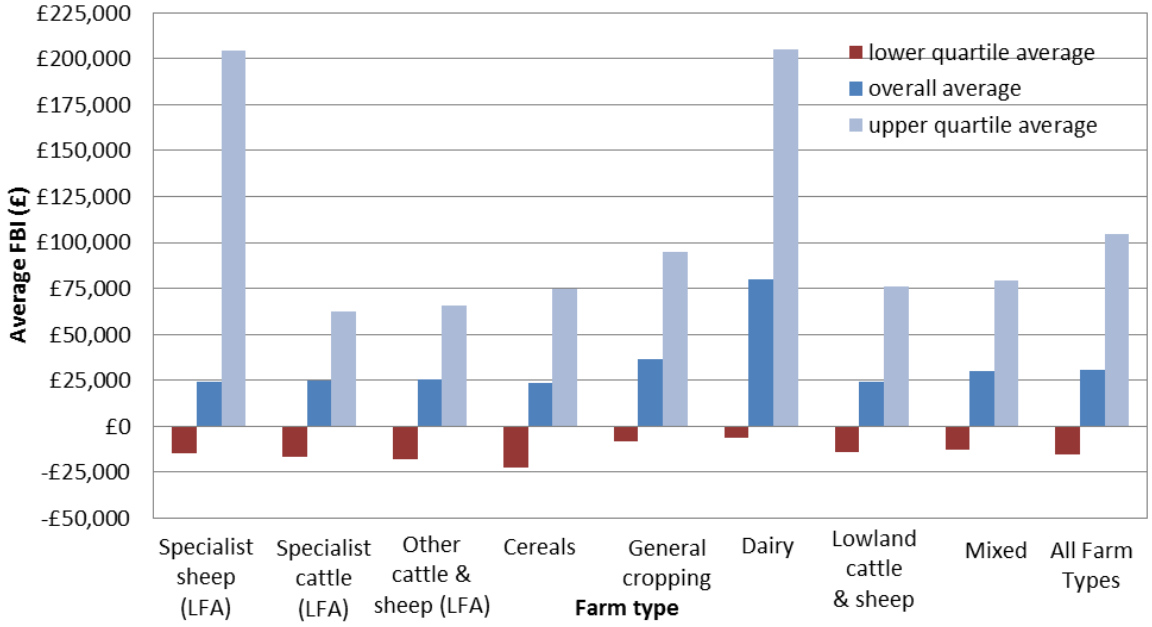


Chart 3.6 shows the distribution of Farm Business Incomes. Twenty two per cent of farms, or approximately one in five, had a negative FBI. A further 42 per cent had an FBI below £30,000; so, while the average FBI is £31,000, 64 per cent of farms earn less than this. Sixteen per cent of farms achieved an FBI between £30,000 and £50,000. A further 13 per cent achieved an FBI of £50,000 to £100,000, and seven per cent achieved an FBI of £100,000 or more.

Chart 3.7 shows the average FBI of all farm types by quartile, i.e. the average for farm businesses with the lowest 25 per cent of FBI values, the overall average, and the average of those farm businesses with the highest 25 per cent of FBI values.

Chart 3.7: Average FBI by farm type and quartile (lowest 25 per cent, average, upper 25 per cent), 2013-14



Across all farm types there was a considerable difference between higher and lower performing businesses. The overall average FBI of farms in the lower quartile was a loss of -£15,000, while those in the upper quartile generated an average income of £105,000 (more than three times the average FBI).

All lower quartile farms made an overall loss in terms of FBI in 2013-14. The average FBI of lower quartile farms ranged from a loss of -£22,000 for cereal farms to -£6,000 for dairy farms. Dairy farms had the highest average farm business income in 2013-14 at £80,000.

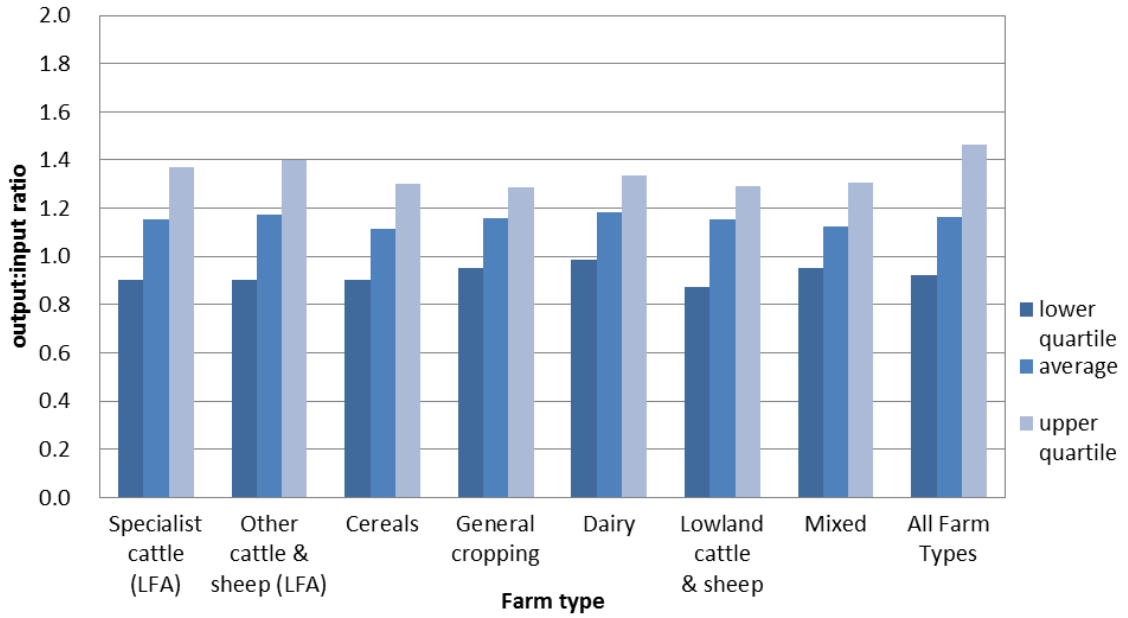
The average FBI for upper quartile farms ranged from two to eight times the overall average for each farm type. Dairy farms had the highest upper quartile income at £205,000. Specialist sheep (LFA) farms had the second highest upper quartile income, this is in part due to a small number of specialist sheep (LFA) farms engaging in miscellaneous agricultural activities not related to sheep production.

There are many factors which contribute to the relative performance of a farm business, including tenure of the farm (with tenant farms having relatively higher overheads), prices and duration of contract for produce, supply costs and efficiency of application of inputs, level of indebtedness, as well as the motivations for farming and preferences for methods of farming of individual farm owners/managers. The variation seen between the quartiles does not take into account the overall size of farms. Larger farm business will have larger input costs as well as output value compared to smaller equivalent business but both could be working with equal efficiency.

The output to input ratio can be viewed as a measure of productivity, i.e. how much output can be produced per unit of input. Chart 3.8 shows the differences in the relationship between output value and input costs which result in the differences in

FBI. The overall average output to input ratio is 1.16, meaning that for every £1 spent on inputs, Scottish farm businesses are generating £1.16 worth of outputs.

Chart 3.8: Average output:input ratio by farm type and quartile (lowest 25 per cent, average, upper 25 per cent), 2013-14



The average for farms in the upper quartile (relatively high performers) is around £1.46, while for those in the lower quartile (relatively low performers) it is around £0.92; an average loss of £0.08 for every £1 spent.

Table B4 shows that upper quartile specialist sheep (LFA) appear to be more efficient in 2013-14 at producing output than other farm types. This in part is due to a small number of specialist sheep (LFA) farms engaging in miscellaneous agricultural activities not related to sheep production, therefore this farm type is not displayed in Chart 3.8 but has been included in the calculation for average farms. There is however generally a greater variability for this farm type compared to, say, general cropping or dairy farms. As above, the quartiles here have been determined based on FBI, and not on output:input ratio.

It should be noted, however, that a higher output to input ratio does not necessarily lead to a higher FBI when comparing across farm type. FBI depends on both the ratio between and the absolute levels of outputs and inputs. For example, whereas the upper quartile output:input ratio of specialist sheep (LFA) farms, £2.91, was the highest of all farm types, the upper quartile of specialist sheep (LFA) farms, £204,000, was the second highest of all farm types. This was due to the relatively low absolute value of outputs and inputs.

3.5 Enterprise gross margins (Table B12)

The purpose of enterprise analysis is to provide a basic assessment of financial performance of the main farm enterprises in Scotland. By “enterprise” we mean, for example, analysing just the sheep farming part of a sheep farm, rather than including any other farming or other activities carried out by the business. This allows individual farmers and others with an interest in the agricultural industry to compare individual enterprise performance against sector averages. As more results become available in future years it will also provide a useful guide to performance over time.

The performance of an enterprise is difficult to assess and relies on a number of factors that cannot be identified through this analysis, such as natural constraints (e.g. quality of land, weather, etc.), reason for farming (e.g. financial, personal satisfaction, etc.), methods of farming (e.g. organic versus conventional production methods), fixed costs of the whole farm business, the interaction of other enterprises within the farm business, and many other factors.

The results are presented as gross margins, as no account has been taken of fixed costs of the enterprises: those costs which are not attributed to a specific enterprise. These costs could vary greatly depending on the size or type of farm or enterprise. The results are from the 2013-14 Farm Accounts Survey (FAS), which centres on the 2013 crop year.

Results are provided as un-weighted group averages for each enterprise and within each enterprise (where sample size allows) to identify differences between relatively high performers (those achieving the 25 per cent highest gross margins), the average for the whole enterprise group and relatively low performers (those achieving the 25 per cent lowest gross margins). Enterprises have been classified as high or low performers based on their gross margins, though this does not necessarily mean that high performing enterprises are being managed more effectively. The intentions, attitudes, reasons for farming and factors outside the control of farmers and farm managers have not been considered in this analysis.

The analysis examines three measures of financial performance, the main measure is the enterprise gross margin per head or per hectare, which shows the gross income (before accounting for fixed costs) from a single unit of output (per head for livestock and per hectare for crops). Additional measures are the overall enterprise gross margin, which shows the overall balance of the enterprise, and the output:input ratio, which shows how much gross return is achieved per pound (£) spent per single unit of output (head per hectare). Enterprise output includes the market value of the output retained on the farm.

The three measures each provide a different insight into the performance of the enterprise. Taken in isolation, these figures may provide a misleading impression of the performance of an enterprise relative to high, low or average performers, or to different enterprises. It is intended that each measure be taken into consideration when drawing comparisons based on this analysis.

Analysis for crop, cattle and sheep enterprises are presented in sections 4.5, 5.2.7 and 5.3.6 respectively. More detailed results, including sample size information, are available from the agriculture statistics web page, Enterprise Performance Analysis[8].

3.6 FBI per unpaid labour (Tables B1, B9)

FBI does not include imputed costs for the value of unpaid labour (farmer, spouse, other partners, directors and managers) who are, to some extent, dependent on the income of the farm business. The unpaid FTE (full-time equivalent) of a farm relates to the total number of hours worked by regular unpaid labour. One FTE is equivalent to 1,900 worked hours in a year. Chart 3.3, earlier in this publication, also shows the average FBI of Scottish farms per unit of unpaid labour.

Trends in FBI/FTE roughly mirror overall FBI at a reduced level; typically around a third lower. In 2013-14 the overall average FBI/FTE was £21,000 and it can be seen in Chart 3.3, that the difference between FBI and FBI/FTE was largest in 2010-11; reducing the value of FBI/FTE in that year. Over the last year, the average FTE has remained relatively unchanged.

FBI/FTE reveals more than FBI alone. When looking in more detail, for example by farm type (covered in later sections of this publication), it can be seen that the average FTE varies considerably. Therefore the finance available to remunerate unpaid labour, that is those with an entrepreneurial interest in the farm business, will also vary.

We can put the FBI/FTE into context by comparing it to the minimum agricultural wage (MAW) which farm owners are required to pay farm workers.

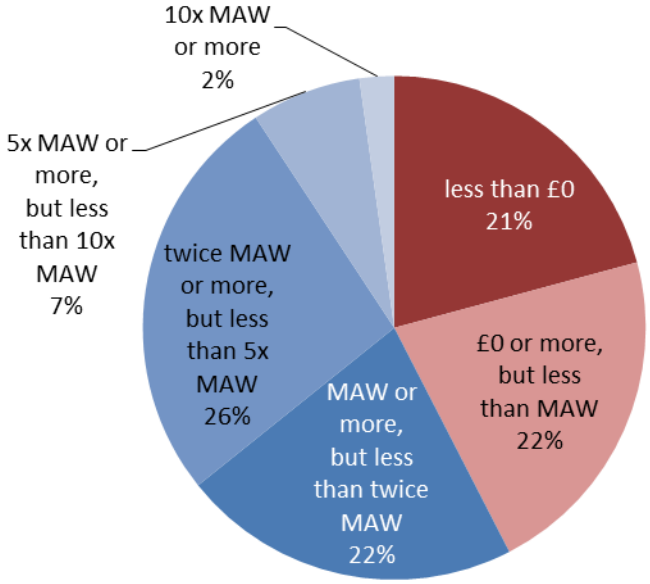
Although the MAW may be less than what the person involved in this unpaid labour would expect to be paid, due to level of experience or qualifications, it is the legal minimum. It should also be noted that the income described by FBI should cover more than just the labour provided by the owner: there is also the unpaid management, provision for return on capital and provision of funds for further investment (beyond the depreciation charges included in costs). Comparison against the MAW is nonetheless a helpful indicator of the performance of farm businesses.

Chart 3.9 shows the distribution of FBI/FTE relative to the MAW. The MAW is updated every year and takes effect from the start of October each year. Although data collected through the FAS spans calendar years, 2013-14 data are centred on 2013. For the purpose of this comparison a weighted MAW for the 2013 calendar year of £6.89 per hour has been used. The average FBI/FTE of £21,000 is equivalent to an hourly wage for unpaid labour of £10.86, one and half times the minimum agricultural wage in Scotland. It should be noted that other costs may need to be covered from the FBI and not all unpaid labour will be remunerated equally. There will also be differences in systems of farming and overheads between farms.

[8] www.gov.scot/Topics/Statistics/Browse/Agriculture-Fisheries/Publications/FASdata

From chart 3.9 we see that 43 per cent of farms generated an FBI/FTE equivalent to less than the minimum agricultural wage, per hour of unpaid labour. At the top end, seven per cent generated an FBI/FTE between five and ten times the minimum agricultural wage, that is, between £34.45 and £68.90 per hour of unpaid labour, and two per cent generated more. The remaining 48 per cent of farms generate an FBI/FTE between one and five times the minimum agricultural wage.

Chart 3.9: Average FBI/FTE, relative to minimum agricultural wage (MAW), 2013-14



3.7 TIFF per annual work unit (Tables A15, A16)

Table A15 provides information on a range of economic indicators related to Total Income from Farming (TIFF).

One measure that is similar to the FBI per FTE (of unpaid labour) in section 3.6 is TIFF per annual work unit. This considers the return to farmers, partners, directors and others with an entrepreneurial interest in the farm business, against the labour they themselves have invested in the business.

This is done by estimating the amount of entrepreneurial labour invested, expressed in terms of full time equivalent annual work units (AWU). TIFF is then divided by this total to provide TIFF per AWU. AWU is effectively the same concept as the FTE in section 3.6, but AWU is calculated from Scotland-level agricultural census data on the number of entrepreneurial workers, whereas the FTE figure is calculated by converting FAS data, on hours of unpaid worked, into the equivalent number of people.

Table A15 shows that in 2014, the total amount of entrepreneurial labour invested was 26,731 AWU. Dividing the TIFF figure of £688 million by this labour, provides an average TIFF per AWU estimate of £25,721. The updated figure for 2013 (the year to which the FBI/FTE figure more generally relates) was £30,623.

Chart 3.10 shows that between 2004 and 2014, and accounting for inflation, TIFF per AWU increased by £5,800 (30 per cent). This increase reflects the £109 million

(19 per cent) real terms increase in TIFF over the same period, as well as a decrease in entrepreneurial labour of 2,490 AWUs (nine per cent). In other words, in 2014 a larger TIFF was being generated by a lower amount of entrepreneurial labour, compared to 2004.

Chart 3.10: Entrepreneurial labour and TIFF per AWUs, both accounting for inflation, 2004 to 2014

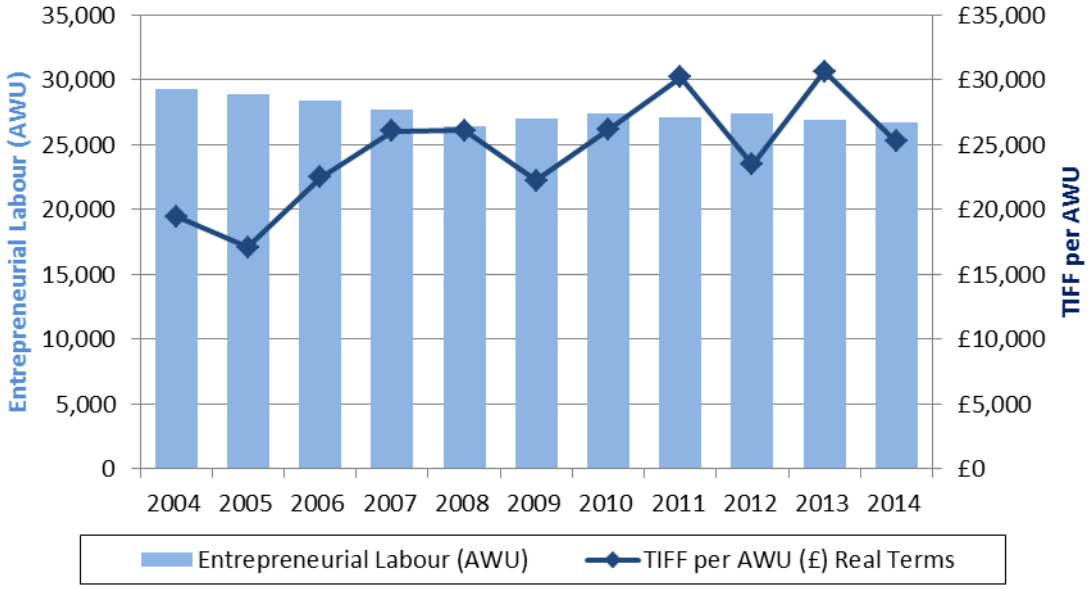


Table A16 (see also spreadsheet version online) shows three different productivity indices, which are based on different definitions with respect to component inputs and outputs. All three measures show a higher productivity in 2009 compared to 2004, with a dip in 2012 - mainly a result of poor crop yields due to the weather. The measures have increased in 2014 compared to 2013.

3.8 Cost centres (Table B13)

The purpose of cost centre analysis is to identify the contribution to the overall business profit or loss of different sources of income within the business. All inputs and outputs have been counted against one of five cost centres: agricultural; agri-environment (land management to support environmental objectives); diversification; agricultural contracting (off-farm use of farm business resources); and income from the direct payments scheme (costs could be incurred against this centre if, for example, accountants are hired to manage claims).

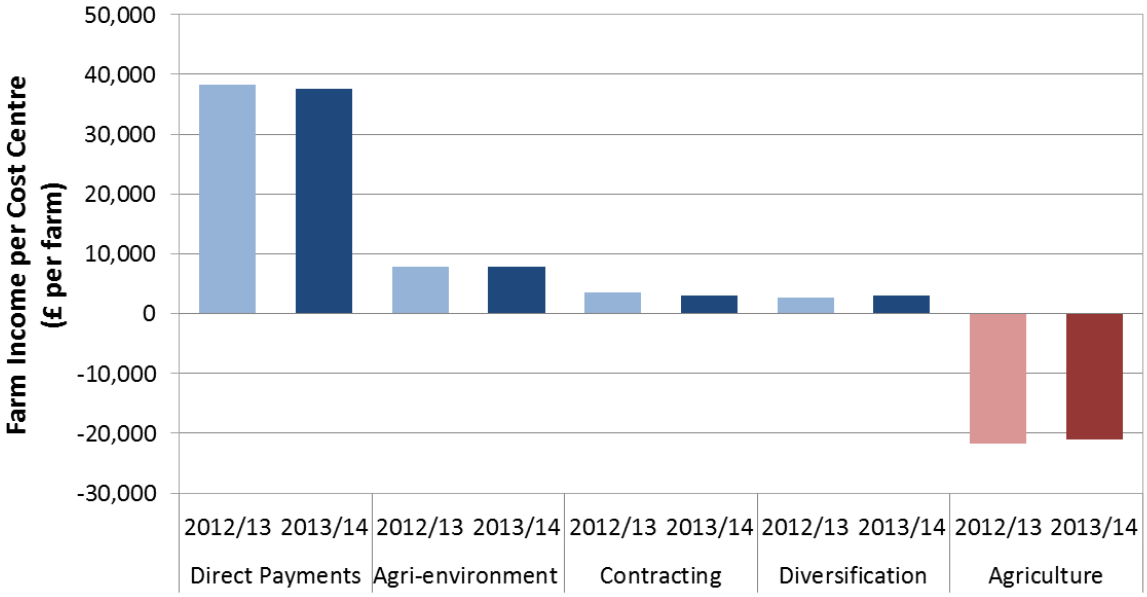
Chart 3.11 below shows the overall average income from each cost centre in 2012-13 and 2013-14. In both years, losses were accumulated against farming activity (the agricultural cost centre) and it is this activity which sees the most fluctuation between years.

In 2013-14, losses made against agricultural farming activities were partly off-set by income generated through diversification, contracting and agri-environment activities, though the profitability of the average Scottish farm business is heavily reliant on income from the Direct Payment Schemes. In 2013-14, losses from agricultural farming activities were comparable to that seen in 2012-13 (-£21,000 on average),

although the average farm business still made a loss even after accounting for diversification (£3,000), contracting (£3,000) and agri-environment activities (£8,000), indicating that farm businesses were reliant on subsidies (£38,000) to make a profit.

Chart 3.11 shows that while farm businesses are generating profits, agricultural activities on their own are generating losses and suggests that farm businesses are heavily reliant on subsidies.

Chart 3.11: Farm Business Income by cost centre, 2012-13 and 2013-14



In 2013-14 the average income to Scottish farm businesses from direct payments was £38,000, down two per cent on the previous year. There was little change in the value derived from agri-environment schemes and contracting in the latest year, with these activities generating an average of £8,000 and £3,000 respectively. In 2013-14, diversified activities generated around £3,000 on average, as described below, though there was not the apparent premium in incomes for farms engaged in diversified activities that was seen in 2010-12: this is expected to be due to high depreciation rates associated with early years of investment in renewables.

3.9 Income from diversified activity (Tables B1, B5, B6, B7)

Half of all farms in 2013-14 received additional income from diversified activities (non-agricultural activities that use farm resources, e.g. renting out farm cottages for tourism, income from small-medium scale wind turbines, etc.). Chart 3.12 shows the main activities undertaken and the average income from each, taken from Farm Accounts Survey data. Of farms engaged in diversified activity the overall average income from such activities was £4,000. Almost half (43 per cent) of diversified activities were renting out buildings (for uses other than tourist accommodation), but it was income from land used for mobile phone masts that generated the greatest margins from diversification.

Chart 3.12: Average income from diversified activities, 2013-14

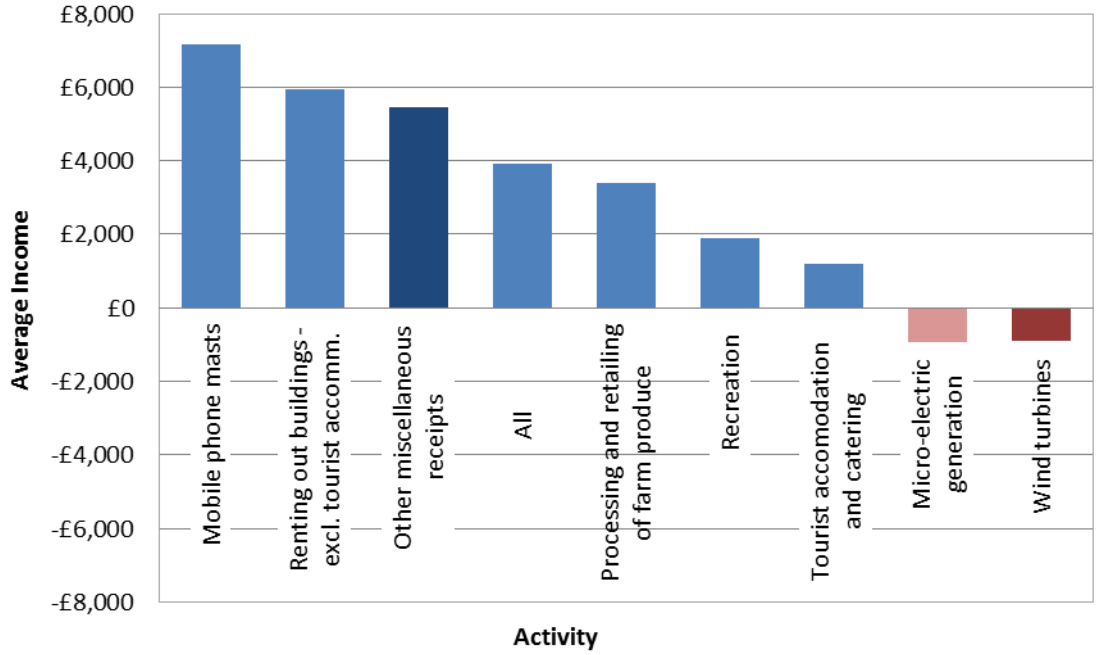
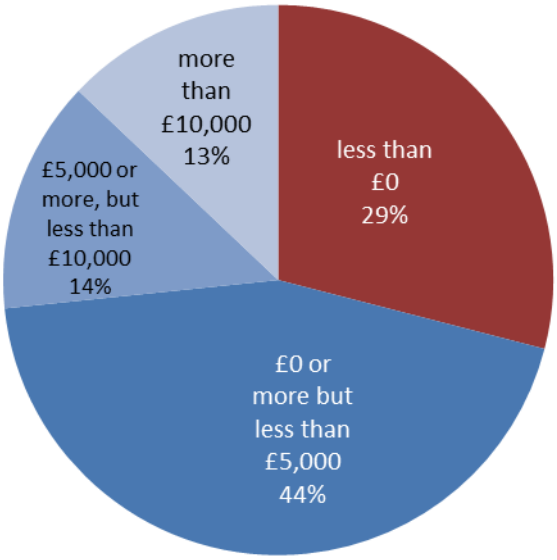


Chart 3.13: Distribution of income from diversified activities, 2013-14



Of the other separately identified activities, processing and retailing of farm produce was the least common activity, with only two per cent of farms engaged in this activity.

Micro-electric generation and wind turbines were the only activities which made an average loss, although the losses seen were not as high as in 2012-13. There are relatively high start-up costs compared to initial output as well as high depreciation costs associated with these activities.

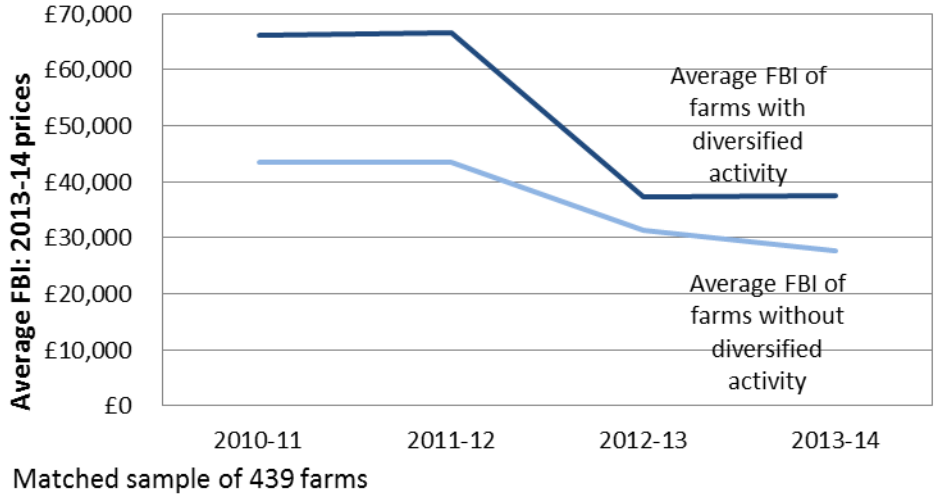
Chart 3.13 shows the distribution of income from diversified activities. Around a third of farms with diversified activities (29 per cent) did not make a profit from their activities. A further 44 per cent made up to £5,000, with the remaining 27 per cent making more than £5,000.

To examine trends in diversified activities, a matched sample of 439 farms was taken; this sample includes the same farms in each of the last four years, from 2010-11 to 2013-2014. Over this period the percentage of farms engaged in diversified activities increased from 47 per cent to 50 per cent, though given the sample size it is not clear whether diversified activities are used more frequently now.

The average number of diversified activities on farms with any such activity has remained largely unchanged, at 1.4, as has the share of overall FBI coming from diversified activities, at 16 per cent. Chart 3.14 shows, from the matched sample, the average FBI of those farms engaged in any diversified activity and those with no diversified activities.

Average FBI for farms engaged in diversified activities, at £38,000 is greater than for those without diversified activities (£28,000), but in the last couple of years the size of this difference has decreased. Cereal and general cropping farms had the highest average incomes from diversified activities (Table B1), at around £7,000 and £6,000 respectively per farm.

Chart 3.14: Comparison of average income of farms with and without diversified activities, 2010-11 to 2013-14



The TIFF estimate for the total income from non-agricultural activities was £209 million in 2013 and £227 million in 2014, with costs estimated as £57 million in 2013 and £58 million in 2014.

3.10 Off-farm income (Table B10)

Farm owners often supplement their income from agricultural activities with income from other sources. Off-farm income refers to these additional sources of income for farm owners and their spouses.

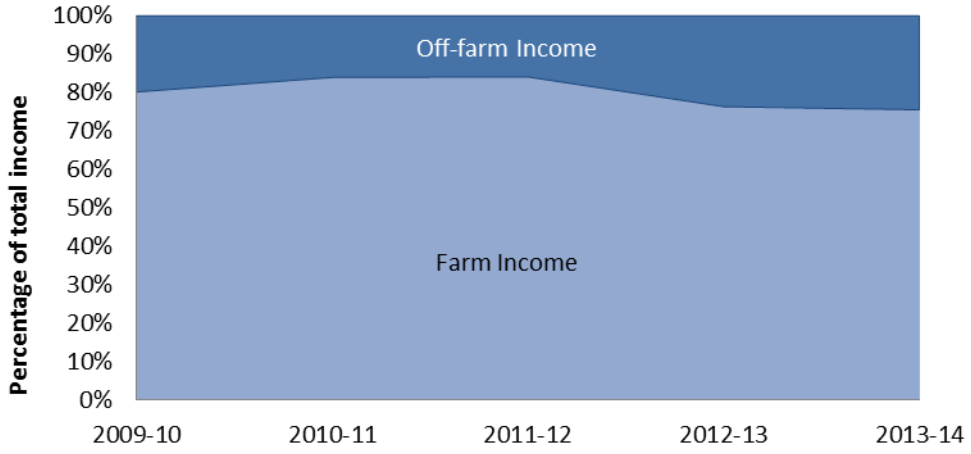
Overall, in 2013-14, 55 per cent of off-farm income came from employment or self-employment, with the remaining 45 per cent coming from investments and pensions.

Chart 3.15 shows the percentage of total income (agricultural income and off-farm income combined) that comes from agricultural activities (including diversified activities and grants and subsidies) and from off-farm income sources (such as employment and investments).

In 2010-11 and 2011-12 the percentage of total income per FTE (FBI/FTE plus off-farm income/FTE) provided by agricultural activities was relatively unchanged at around 84 per cent. In 2012-13 and 2013-14 this fell to 76 per cent. Accounting for

inflation, both sources of income have decreased on average compared to 2009-10, FBI/FTE by around 30 per cent and OFI/FTE by around seven per cent.

Chart 3.15: Contribution of farming and off-farm income to overall income, 2009-10 to 2013-14



3.11 Balance sheets (Tables B11, A13, A14)

Chart 3.16 shows the average change between 2012-13 and 2013-14 (in actual prices) of assets, liabilities and net worth of Scottish farm businesses by tenure type and the overall average for all tenures. Overall, assets increased by around two per cent (by £33,000), while liabilities increased by around five per cent (£6,000), resulting in an overall increase of two per cent (£27,000) in net worth.

Chart 3.16: Change in assets, liabilities and net worth by tenure, 2013-14

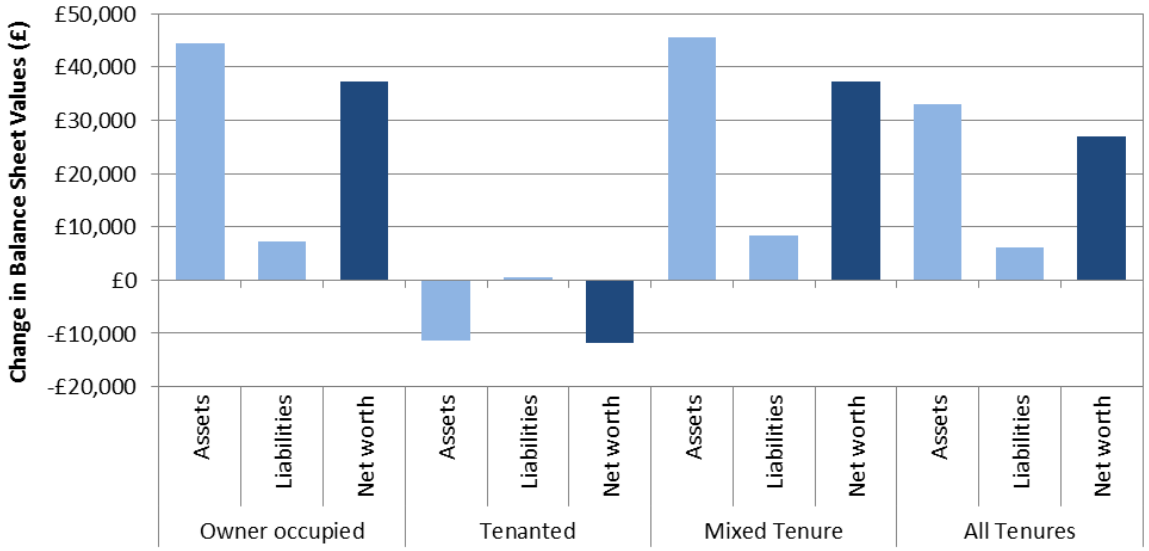


Chart 3.17 summarises the closing valuations of Scottish farm businesses in 2013-14 by tenure type. In general, owner occupied farms had the highest net worth due to the greater value of assets. Tenanted farms had the lowest overall net worth, due to a low value of assets and a high value of liabilities relative to assets. The overall average net worth of Scottish farm businesses (all tenure types) in 2013-14 was £1.3 million.

Chart 3.17: Assets, liabilities and net worth by tenure, 2013-14

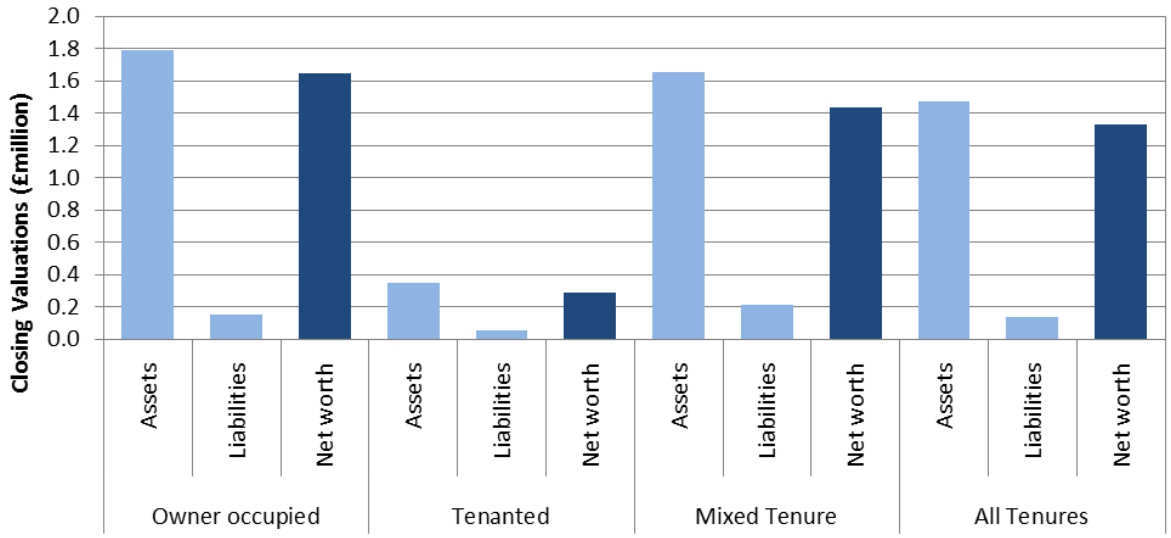
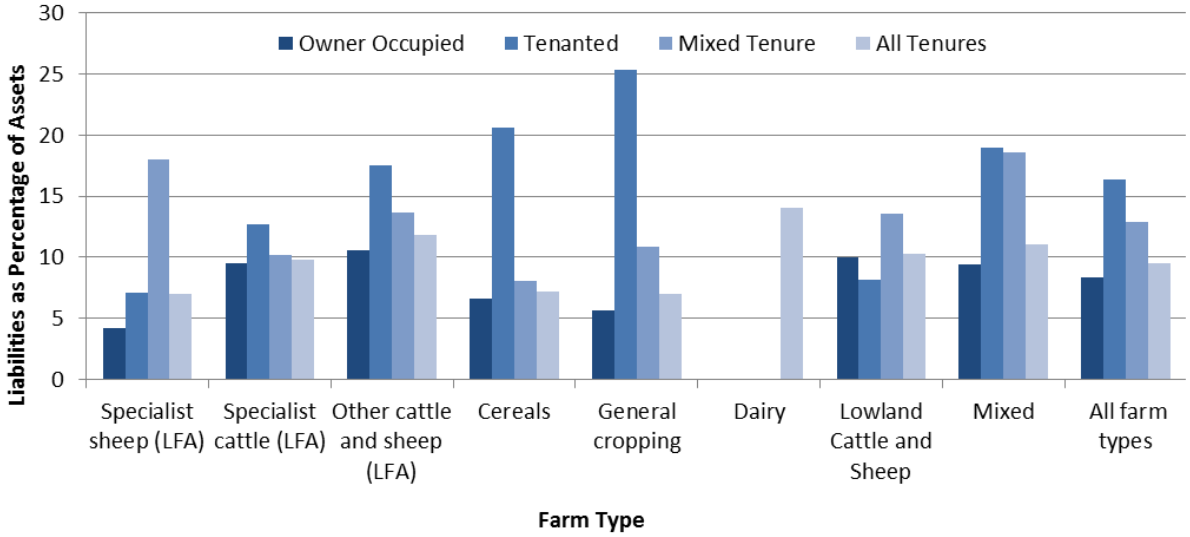


Chart 3.18 shows the debt ratio (liabilities: assets) expressed as percentages for each farm type and tenure. The debt ratio provides an insight into how indebted the sector is and its ability to service those debts. Overall, Scottish farm businesses have, on average, relatively low debt ratios (liabilities nine per cent of assets), reflecting the fact that their assets heavily outweigh their liabilities.

Chart 3.18: Liabilities as a percentage of assets, 2013-14



Tenanted farm businesses, where relatively little capital is owned, have higher debt ratios, though on average assets still outweigh liabilities by about six to one; that is, for every pound of debt, the tenanted business has at least six pounds of assets. For owner occupied farm businesses assets are on average around 12 times greater than liabilities.

Cereal, general cropping and specialist sheep farms had the lowest debt ratio, at seven per cent. Dairy farms had the highest ratio at 14 per cent, while those of other farm types lay between ten per cent and 12 per cent; the overall average debt ratio was nine per cent.

At a national level, using TIFF data, over the period 2004 to 2014 the net worth of Scottish agriculture has increased by two and a half times from £13.7 billion to £34.4 billion. This is primarily because of a large rise in the value of land and buildings over that period, which has risen from £12.2 billion in 2004 to £32.3 billion in 2014, with most of this rise occurring since 2007. Land value information is based on land prices from the Value Office Agency which has been supplemented with data from the Royal Institution of Chartered Surveyors (RICS).

The liabilities of Scottish agriculture have risen 38 per cent between 2004 and 2014 to £2.6 billion, representing seven per cent of total asset value.

The amount farmers invested in buildings, plant, machinery and vehicles decreased by £10 million (one per cent) from 2013 to 2014.

3.12 Long term trends – Net Farm Income (NFI)

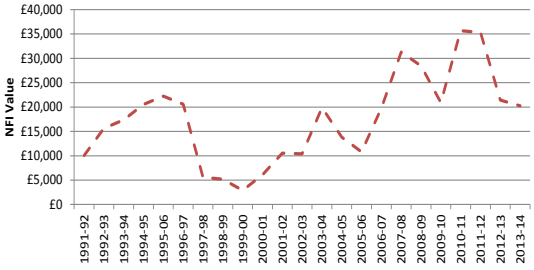
While FBI is the headline business-level measure of farm income, it is a relatively new measure of income and only allows comparisons over the last four years. Net Farm Income (NFI) has a much longer time series available for comparing income levels and examining trends. This measure places all farms on a tenanted basis, with imputed rent costs applied to owner occupiers. It is quite a different measure from FBI, estimating the return only to the farmer and spouse for their managerial input to the farm business.

Looking at the general trend over the last 22 years in actual prices, for the average over all farm types, suggests that, while farm incomes are subject to a considerable level of fluctuation, they have more than trebled between 1997-98 and 2010-11. Farm incomes were at their lowest between 1997-98 and 2000-01, during the time of a strong pound, weak world commodity prices, and the ban on beef exports following outbreaks of bovine spongiform encephalopathy (BSE).

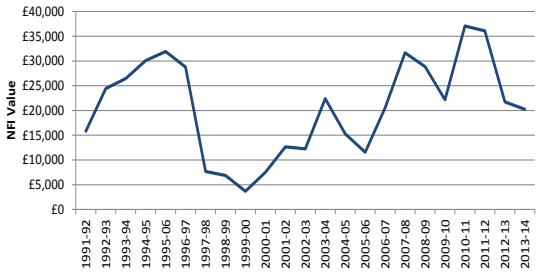
However, when accounting for inflation the picture is quite different. When the time series is converted into 2013-14 prices - the equivalent value of incomes in today's economy - we see that the decline in farm incomes in the mid-1990s was more severe and was followed by a slower recovery. Trends vary by farm type, but the general trend described above is witnessed across all farm types.

Long Term Trends – Net Farm Income by farm type

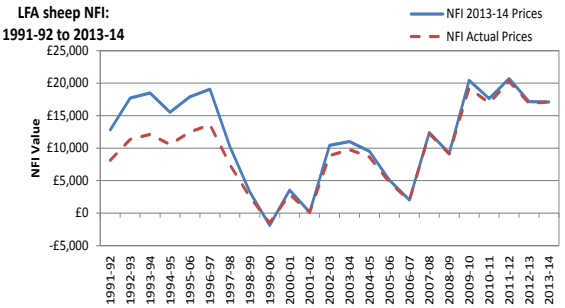
All farm types NFI actual prices



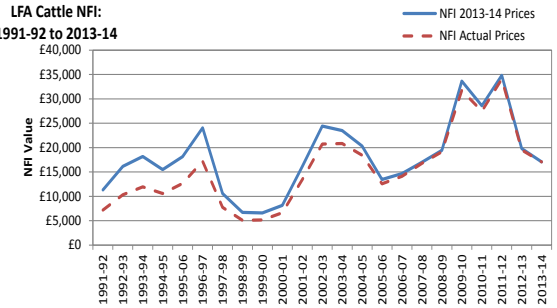
All farm types NFI actual prices



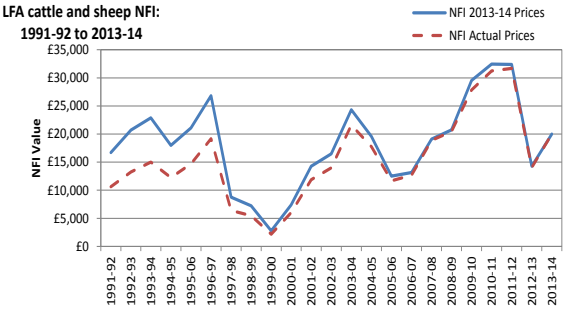
LFA sheep NFI: 1991-92 to 2013-14



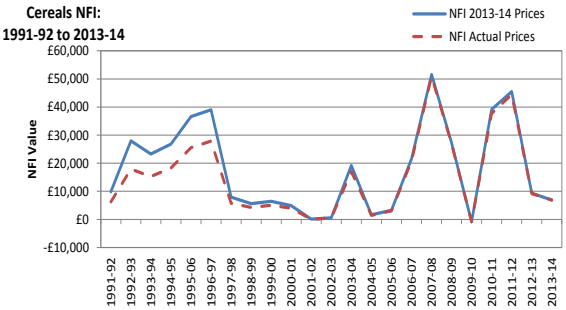
LFA Cattle NFI: 1991-92 to 2013-14



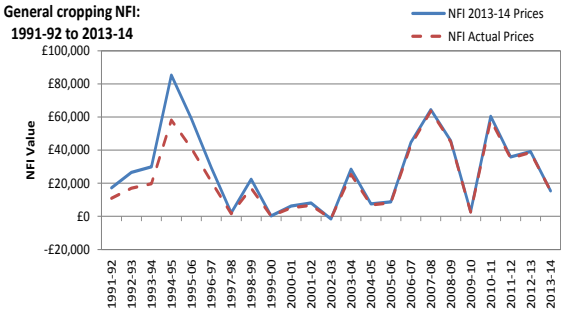
LFA cattle and sheep NFI: 1991-92 to 2013-14



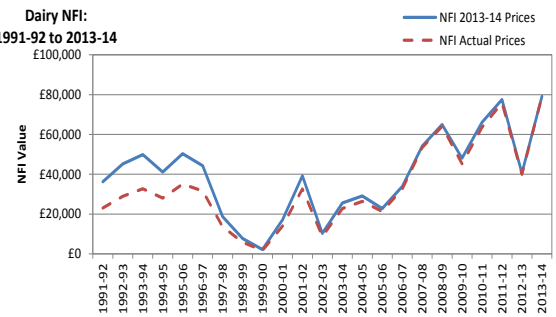
Cereals NFI: 1991-92 to 2013-14



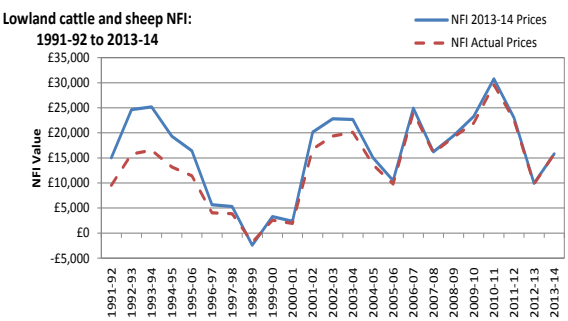
General cropping NFI: 1991-92 to 2013-14



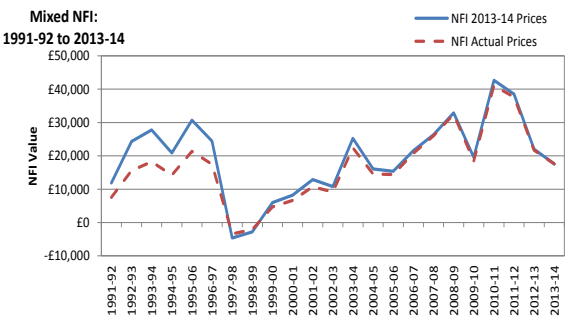
Dairy NFI: 1991-92 to 2013-14



Lowland cattle and sheep NFI: 1991-92 to 2013-14



Mixed NFI: 1991-92 to 2013-14



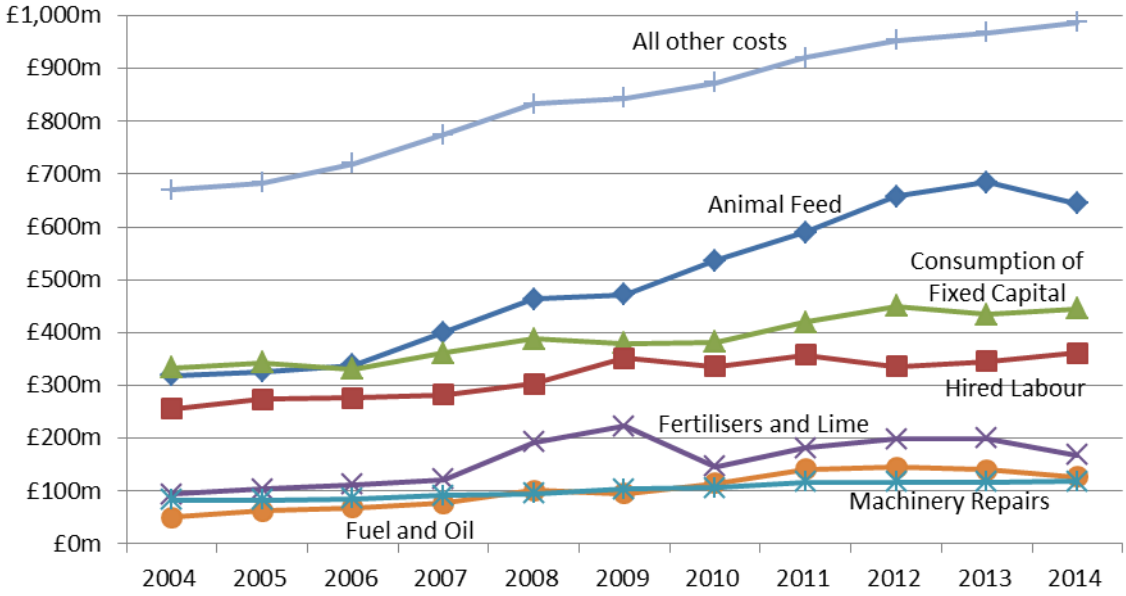
3.13 Farming costs (Table A1)

In 2014, the initial TIFF estimate for the total costs incurred by agricultural businesses was £2.85 billion. These costs are made up of many different components. Estimates for 2014 are very dependent upon data not available until later in 2015, and so those presented here should only be considered provisional.

Please note that in this section (3.13 to 3.13.5), increases are stated in actual terms, rather than real terms. For calculations of real terms increases, inflation since 2004 was 26.7 per cent and since 2013 was 2.0 per cent.

In 2014, the largest costs were for: animal feed (£644 million or 23 per cent of the total); consumption of fixed capital (£445 million or 16 per cent, including £181 million of livestock); hired labour (£361 million or 13 per cent); fertilisers and lime (£169 million or six per cent); fuel and oil (£127 million or four per cent) and machinery repairs (£119 million or four per cent). All other costs, totalling £987 million accounted for 35 per cent of the total.

Chart 3.19: Total farming costs 2004 to 2014



Since 2004, total costs have increased by £1,046 million (58 per cent) from £1.8 billion to £2.9 billion in 2014. The largest increases have occurred in animal feed (up £325 million or 102 per cent) and fuel and oil (up £76 million or 150 per cent).

3.13.1 Animal feed (Tables A1, A7)

Most of the animal feed costs are associated with the purchase of concentrate feed, especially for cattle and sheep. Over the past ten years, increasing trends in the cost of these concentrate feeds have contributed the most to the overall increase in animal feed costs; however, they saw an estimated six per cent fall in 2014.

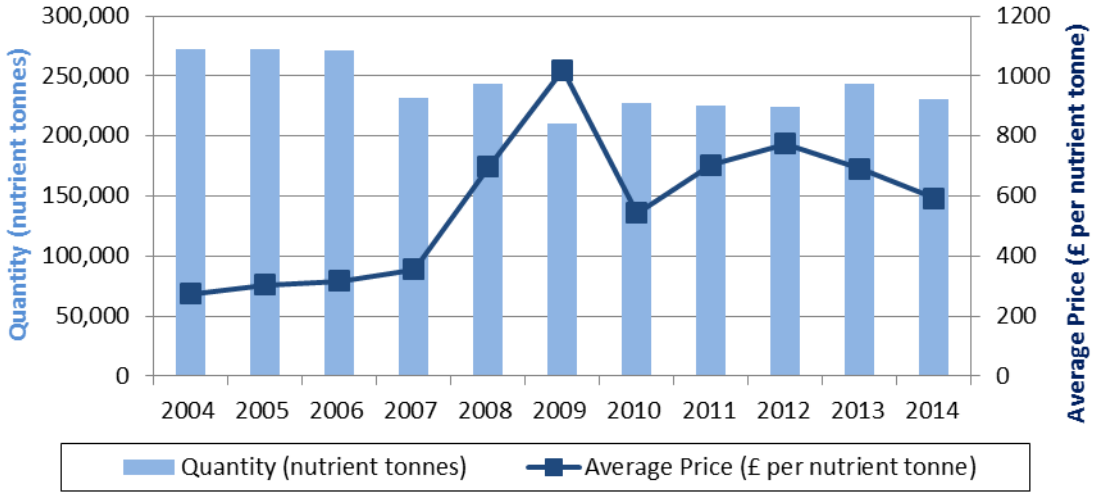
3.13.2 Fertiliser and lime (Tables A1, A8)

There has been substantial variation in the cost of fertilisers and lime over the past few years, as shown in Chart 3.20. Table A8 shows key components of the underlying price and quantity information used in the compilation of the fertiliser and lime valuation.

It should be noted that the vast majority of fertilisers are used in the first half of the calendar year. However, a substantial proportion of these fertilisers will have been purchased in the previous autumn/winter. This lag between purchases and usage has been accounted for in the TIFF valuation and should be borne in mind when comparing average annual prices in TIFF with monthly market prices.

Chart 3.20 shows a summary of fertiliser usage and average annual prices, expressed in terms of nutrient tonnes. Nutrient tonnes are used in order to account for different types of fertilisers which have different compositions in terms of nutrient content.

Chart 3.20: Quantity and average annual prices of fertilisers used 2004 to 2014



There was a decreasing trend in the usage of fertilisers between 2004 and 2010, with the volume remaining fairly steady since then. Compared to 2004, the quantity of fertiliser usage in 2014 was 41,700 tonnes lower (15 per cent), however the average price was £319 per tonne higher (117 per cent). Over this period average prices increased sharply from 2007 to a peak of £1,021 per tonne in 2009. In 2010, prices fell back before rising again in 2011 and 2012, and then falling back. Prices were estimated to have fallen 14 per cent in 2014, accounting for the small decrease estimated in the total cost of fertilisers and lime.

3.13.3 Hired labour (Tables A1, A10)

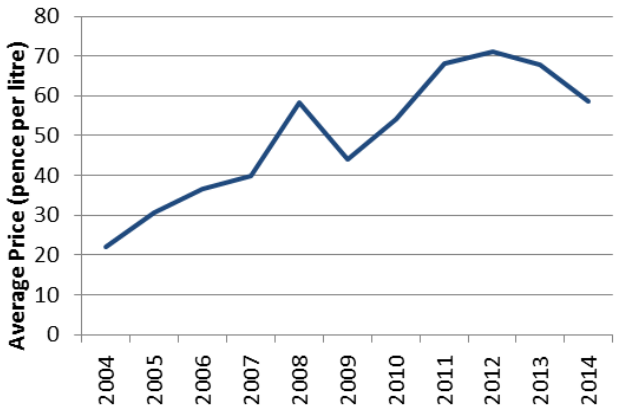
Hired labour costs increased by £106 million (41 per cent) between 2004 and 2014. These costs are calculated by taking into account the number of hired workers reported in the June Agricultural Census and information on earnings from the monthly Survey of Hours and Earnings of Agricultural Workers.

Between 2003 and 2009 there was a gradual decline in the number of hired regular workers, which has steadied in recent years. The number of casual and seasonal workers has been increasing, particularly since 2006.

3.13.4 Fuel (Tables A1, A9)

Red diesel is used as fuel by agricultural businesses. Red diesel is cheaper than conventional diesel, as it attracts lower rates of tax. The overall trend in red diesel prices has shown a steady increase since 2003, with a spike in prices during 2008. Prices remained fairly stable between 2011 and 2013, however prices in 2014 have shown a decrease to a level similar to that in 2010.

Chart 3.21: UK red diesel annual average prices 2004 to 2014



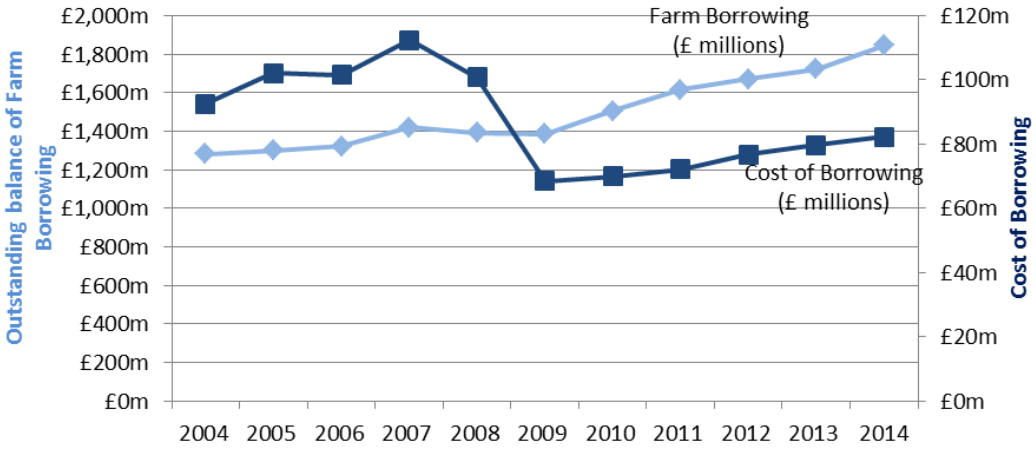
In 2014, the estimated overall cost of fuel and oil decreased by £14 million (ten per cent), reflecting the nine pence per litre (13 per cent) decrease in red diesel prices.

3.13.5 Net interest payments (Tables A1, A11)

Over the past ten years there has been a steady increase in the balance of farm borrowing from banks and other institutions, from £1.3 billion in 2004 to £1.8 billion in 2014. Over the same period, the corresponding cost of borrowing has varied, reflecting changes in underlying interest rates.

There was a large fall in the cost of borrowing (split into two components in table A1, financial services and interest) between 2008 and 2009 of £32 million (32 per cent) due to a decrease in the base rate of interest. The situation has been more stable since 2009, with the small increase predicted between 2013 and 2014 of £2.6 million (three per cent) due to a rise in the estimated amount of borrowing from other sources, identified from the Farm Accounts Survey.

Chart 3.22: Outstanding balance of farm borrowing & cost of borrowing 2004 to 2014



4. Crops

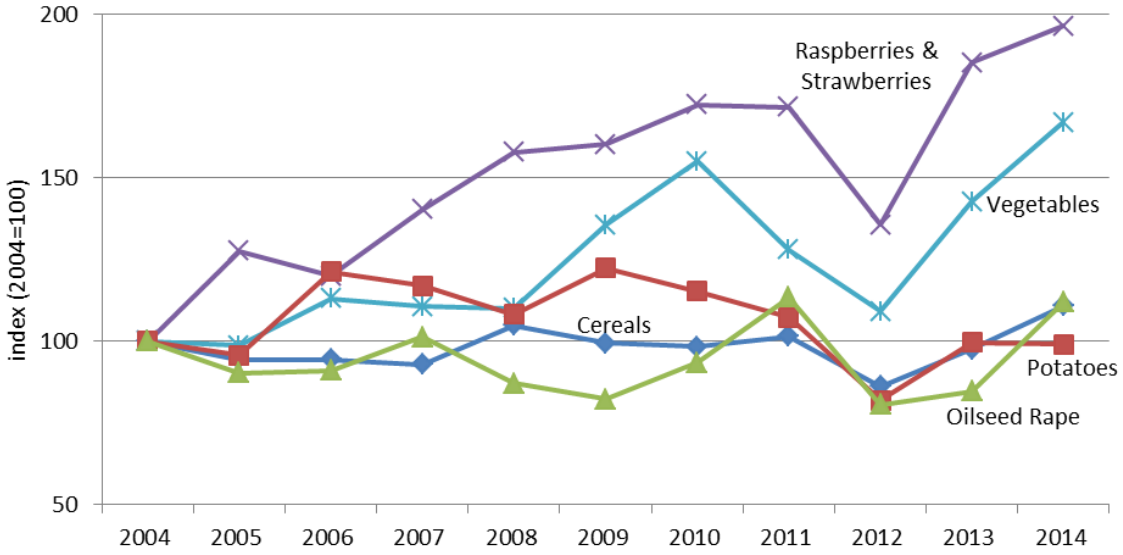
4.1 Overview (Table C2)

In 2014 crops accounted for almost ten per cent of agricultural land; barley accounted for 327,000 hectares, wheat 109,000 hectares, oats 25,000 hectares, oilseed rape 37,100 hectares, potatoes 28,500 hectares, stock-feeding crops 22,000 hectares, vegetables for human consumption 16,300 hectares, and fruit (grown in the open) 760 hectares.

Chart 4.1 shows production trends of various crops, presented as indices of tonnage. The most striking trend is the increase in production of raspberries and strawberries, which has nearly doubled over the past ten years (even with the fall in 2012). This is mostly due to increases in the area and yields of strawberries, with the proliferation of strawberries grown under cover having a big impact.

After steady increases between 2004 and 2010, the production of vegetables decreased between 2011 and 2012, probably due to the poor weather, with a recovery in 2014 to the highest levels seen in the ten years.

Chart 4.1: Production indices for crops 2004 to 2014 (2004 = 100)



The production of potatoes increased by 300,000 tonnes (27 per cent) between 2005 and 2006 and generally remained higher for most years compared to pre-2006 levels. However, as with other crops, poor yields were obtained in 2012, with production falling right back to below 2004 levels. The recovering in 2013 only brought production back to levels similar to those of 2003 with 2014 seeing little change.

There has been little variation in cereal production over the last ten years, which has ranged from 2.51 million tonnes in 2012 to 3.22 million tonnes in 2014. The 2014 harvest was 316,000 tonnes higher (11 per cent) than the 2004 harvest.

The production of oilseed rape, including that grown for industrial purposes, was 15,700 tonnes higher (12 per cent) in 2014 than in 2004. Over the past ten years production levels have been quite varied, ranging between 106,000 tonnes in 2012 and 150,000 tonnes in 2011.

4.1.1 Distribution of crops by region (Table C4)

Chart 2.1 shows the regional distribution of use of agricultural land. In more detail, chart 4.2 shows that Grampian accounted for the largest proportion of barley (41 per cent) and oilseed crops (32 per cent). Tayside had the largest area of wheat (24,500 hectares or 22 per cent of the national total). Map 8 shows the prevalence of cereals on the east coast, with high rates in East Lothian, Fife, Angus and Aberdeenshire.

Crops for stock-feeding were more likely to be grown in areas with high numbers of livestock such as Grampian (4,500 hectares) and Scottish Borders (3,700 hectares), which each represented around a fifth of the Scotland total.

Chart 4.2: Distribution of crop types by sub-region, June 2014

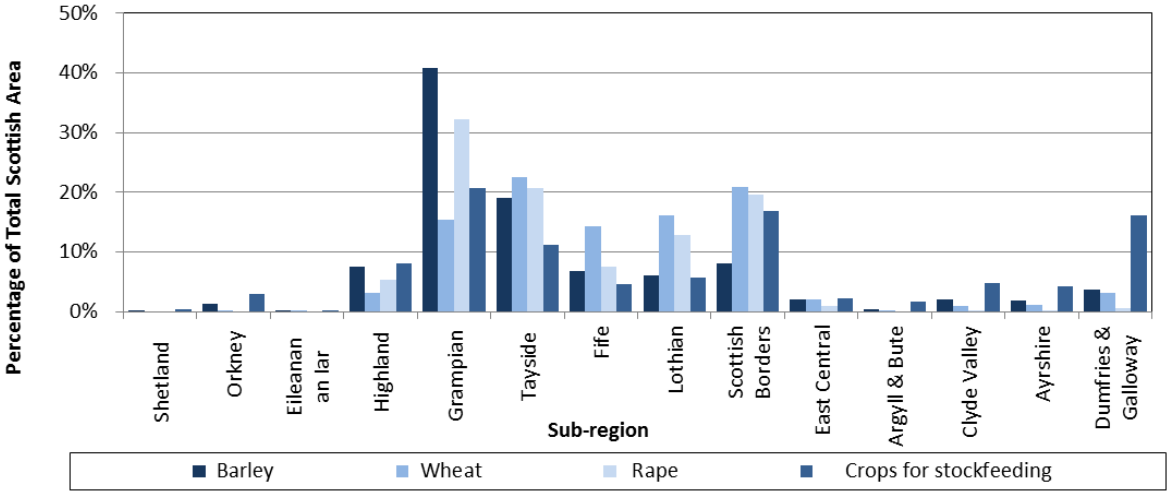
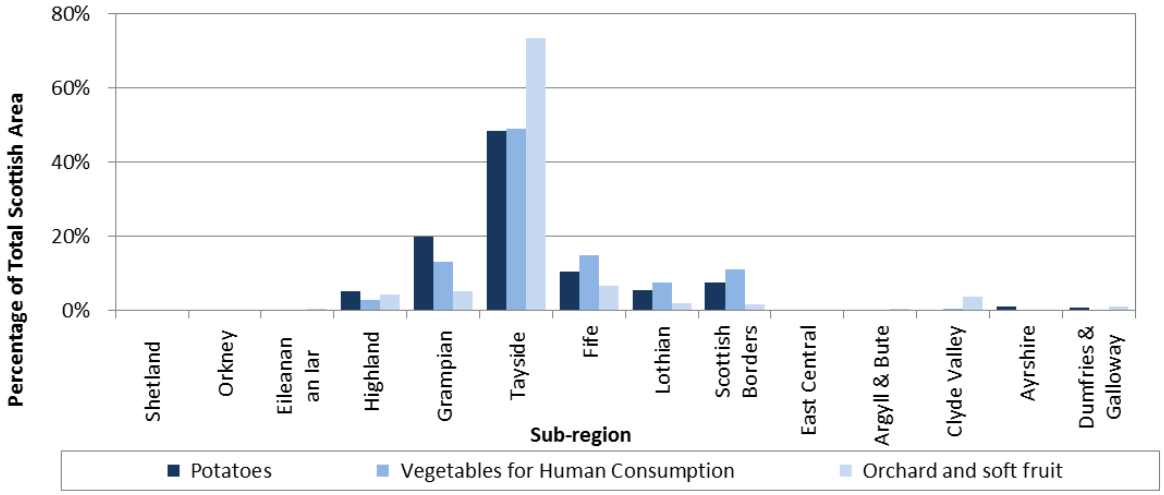
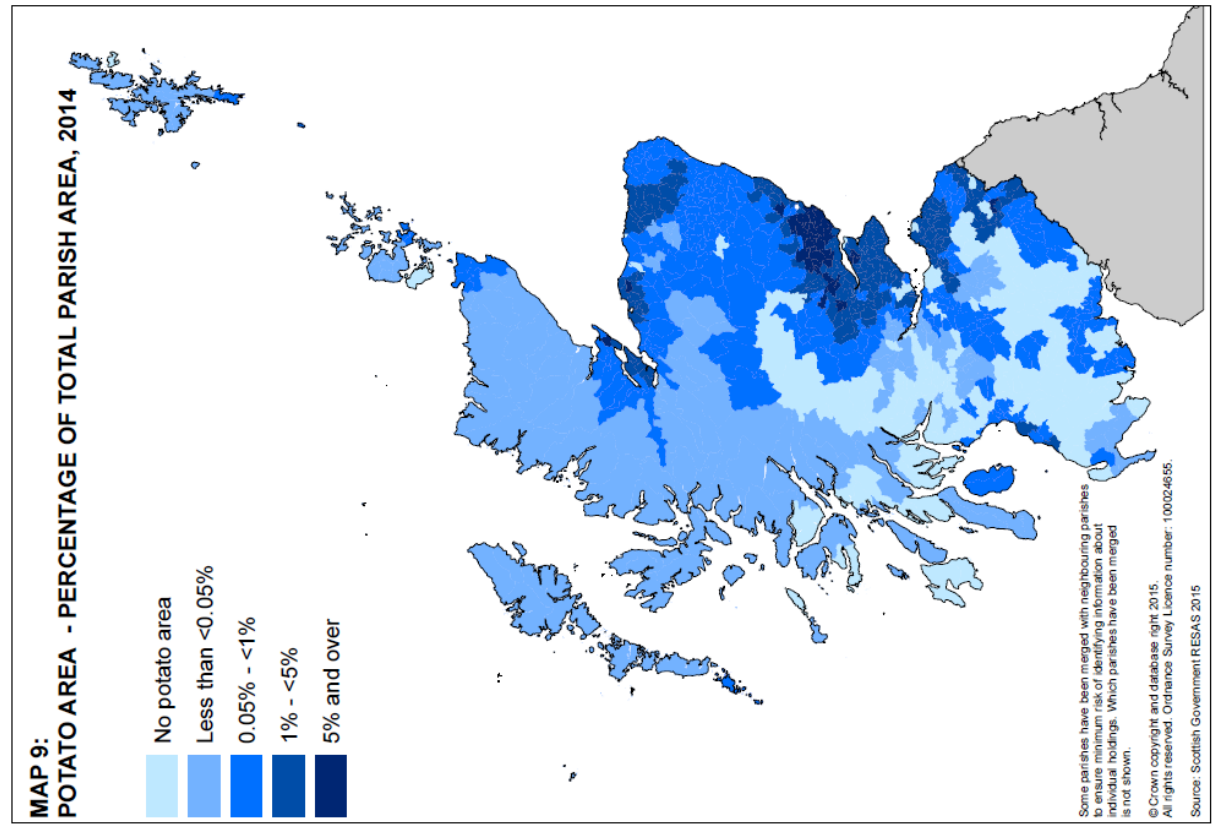


Chart 4.3: Distribution of potatoes, soft fruit and vegetables by sub-region, June 2014



Regarding other crops, chart 4.3 shows that Tayside had 74 per cent (560 hectares) of the land used for orchard and soft fruit in Scotland. Tayside also accounted for nearly half (49 per cent or 8,000 hectares) of the land used in Scotland to grow vegetables for human consumption, and, as illustrated in Map 9, also accounted for nearly half (49 per cent or 13,800 hectares) of the area used for growing potatoes. Elsewhere in the east, Grampian, Fife, Scottish Borders and Lothian are the other areas that contributed greatly to the production of other crops.


MAP 9:
POTATO AREA - PERCENTAGE OF TOTAL PARISH AREA, 2014
No potato area
Less than <0.05%
0.05% - <1%
1% - <5%
5% and over
Some parishes have been merged with neighbouring parishes to ensure minimum risk of identifying information about individual holdings. Which parishes have been merged is not shown.
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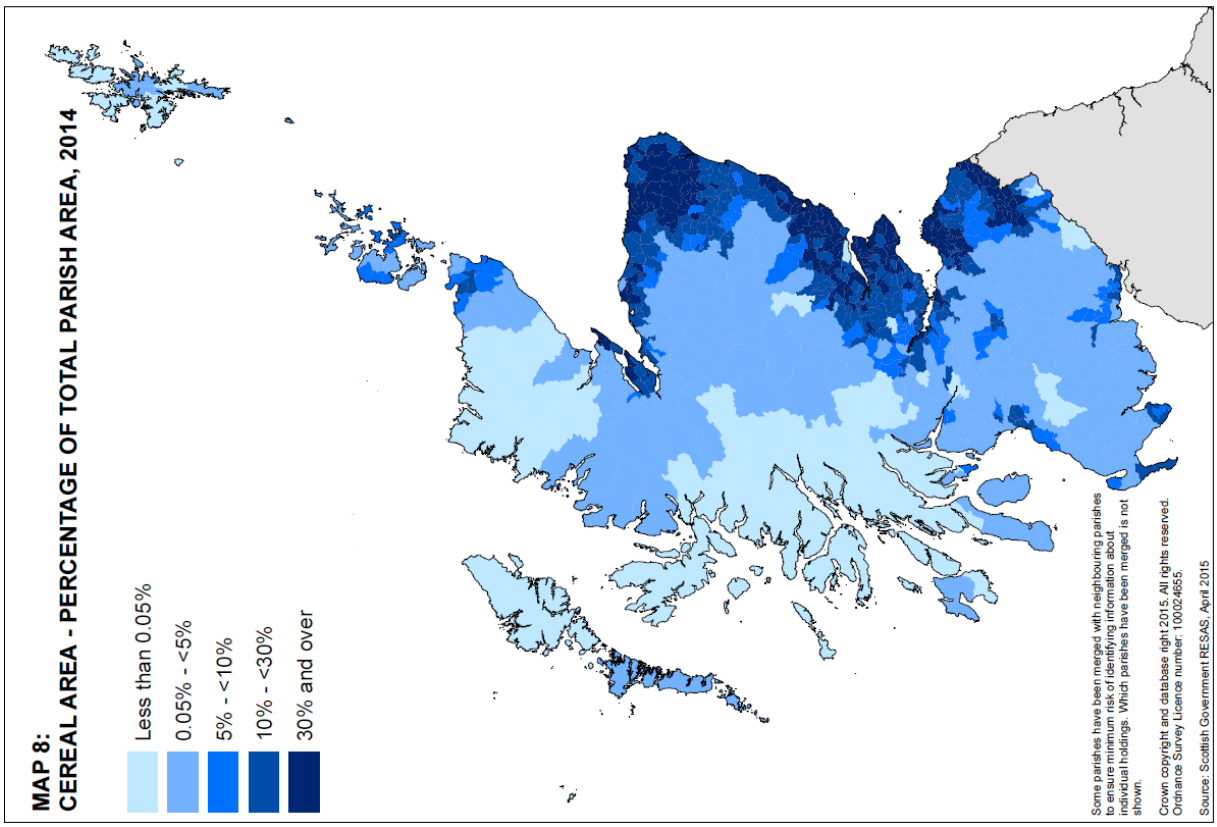
Source: Scottish Government RESAS 2015


MAP 8:
CEREAL AREA - PERCENTAGE OF TOTAL PARISH AREA, 2014
Less than 0.05%
0.05% - <5%
5% - <10%
10% - <30%
30% and over
Some parishes have been merged with neighbouring parishes to ensure minimum risk of identifying information about individual holdings. Which parishes have been merged is not shown.
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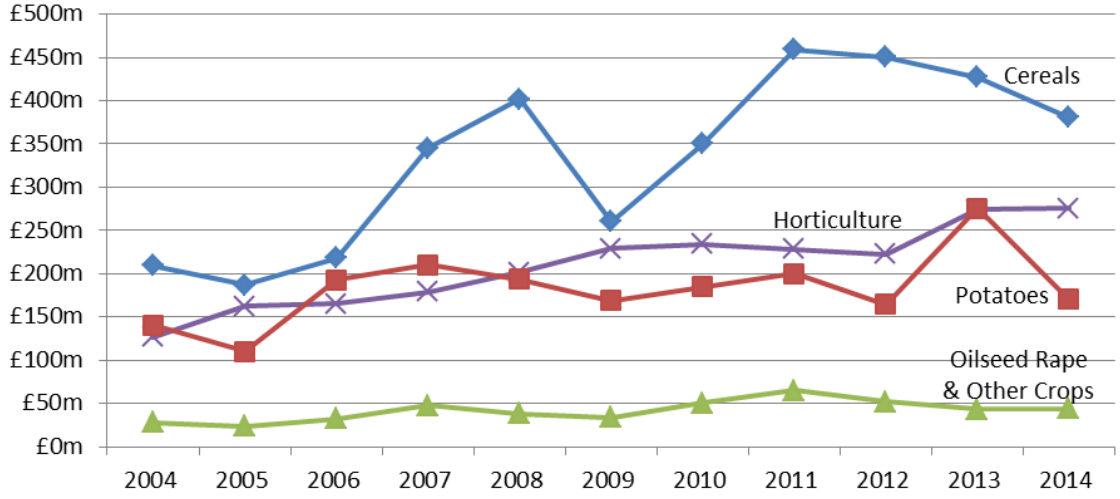
Source: Scottish Government RESAS, April 2015

4.1.2 Income from crops (Tables A1, A2, A3, A4)

Crops account for about 30 per cent of total output from farming. Since 2004 the total output value of crops, excluding related subsidies, has increased by £366 million (72 per cent) to £870 million in 2014. There has been a general increasing trend in the value of horticulture (up £148 million or 117 per cent) along with oilseed rape and other farm crops (up £16 million or 58 per cent), with a slight decrease seen since 2012. Trends in cereals and potatoes have also been upwards but have fluctuated more over time.

Chart 4.4: Output value of crops (excluding subsidies) 2004 to 2014



Between 2004 and 2014 the value of cereals increased by £171 million (82 per cent), however this trend includes large increases of £184 million between 2006 and 2008 and £198 million between 2009 and 2011, as well as a large decrease of £141 million between 2008 and 2009. These trends largely reflect market price movements, as production levels have not varied to this extent.

The value of potatoes increased by £30 million (21 per cent) between 2004 and 2014, this trend included a large increase of £111 million between 2012 and 2013, when production and market prices of potatoes both increased, though this was cancelled out in 2014.

Over the shorter term, provisional estimates for 2014 suggest that the output value of crops decreased by £150 million (15 per cent) from 2013. The output value of potatoes and cereals decreased over the last year by £105 million (38 per cent) and £46 million (11 per cent) respectively. Oilseed rape showed a nine per cent increase, other farm crops fell 21 per cent, while horticulture remained relatively unchanged.

Tables A2(i) to A2(iii) provide information on area, yield and production of a selection of crops. These production figures form the basis of TIFF crop valuations. It should be noted however that production is valued at the point it is used or sold off the farm, so there can be differences between calendar year production and output volumes. The TIFF calculation also includes end year stock valuations.

Statistics on crop areas come from the June Agricultural Census. A detailed description of area trends between 2004 and 2014 is available in the Statistical

Publication 'Results From the June 2014 Scottish Agricultural Census', available at www.gov.scot/stats/bulletins/01117

A detailed description of statistics on area, yield and production of cereals and oilseed rape was published in December 2014 in the publication 'Final Estimate of Cereal and Oilseed Rape Harvest 2014', available at www.gov.scot/Publications/2014/12/2462

4.2 Cereals

4.2.1 Income from cereals (Table A3)

Cereals account for about 12 per cent of total farm output, an estimated £381 million in 2014 and around 45 per cent of the output from crops in general.

Chart 4.5 shows trends in the average annual output prices for cereals, used in the TIFF valuation. It is important to note that these calendar year prices span two crop production years and represent the value of cereals when they are used or sold off the farm. They also represent an average across different types of cereals used for animal feed, seed, human consumption and industrial purposes. These prices, which are obtained from the HGCA (Home Grown Cereals Authority) incorporate tonnages sold on forward contracts as well as cereals sold at spot prices.

Cereal output prices were relatively stable between 2004 and 2006, before increasing substantially in 2007 and remaining high in 2008. They then dropped quite markedly in 2009 before three years of increases. After peaking in 2012 at £180 to £190 per tonne, prices have fallen to about £110 (barley and oats) or £130 (wheat) per tonne, reflecting global trends in supply and demand of cereals.

Chart 4.5: Annual average output prices for cereals 2004 to 2014

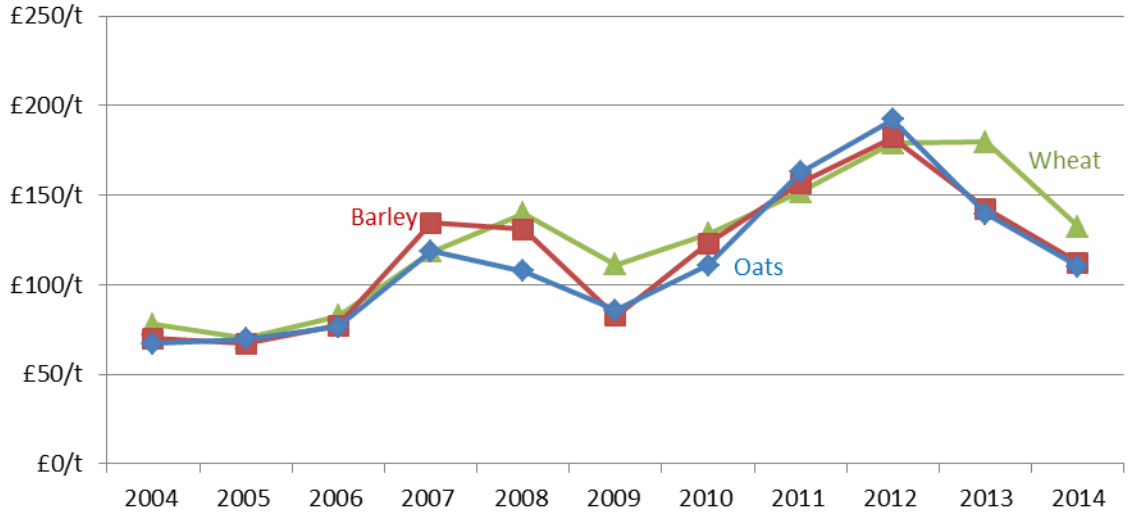
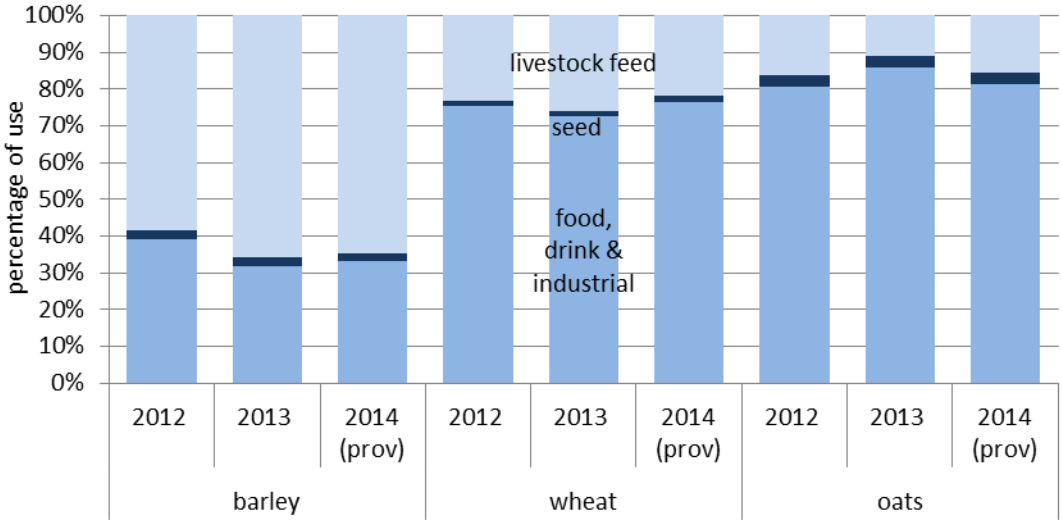


Chart 4.6 shows the utilisation of cereals for different purposes. In 2014, the majority of barley (65 per cent) was used for animal feed, whilst the majority of wheat (76 per cent) and oats (81 per cent) was used for human and industrial purposes.

Chart 4.6: Cereal utilisation: 2012 to 2014



In 2014, total value of cereal output fell by 46 million (down 11 per cent), compared to 2013, following a previous decrease of £23 million (five per cent) between 2012 and 2013. The output value of barley fell by £52 million (down 18 per cent), due to a £31 per tonne (22 per cent) decrease in price outweighing a 82,000 tonne (four per cent) increase in production. The output value of wheat rose by £15 million (13 per cent), due to a 336,000 tonne (52 per cent) increase in production, despite a £47 per tonne (26 per cent) decrease in price. The value of oats decreased by £9 million (34 per cent), driven by a 34,000 tonne (18 per cent) decrease in production and £29 per tonne (21 per cent) decrease in price.

4.2.2 Cereal farms FBI (Table B1)

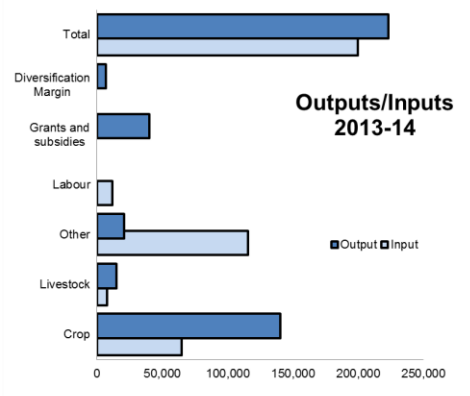
Accounting for inflation, between 2009-10 and 2013-14 the average FBI of cereal farms decreased by around 16 per cent. This was due to an increase in input costs for crops and land and buildings.

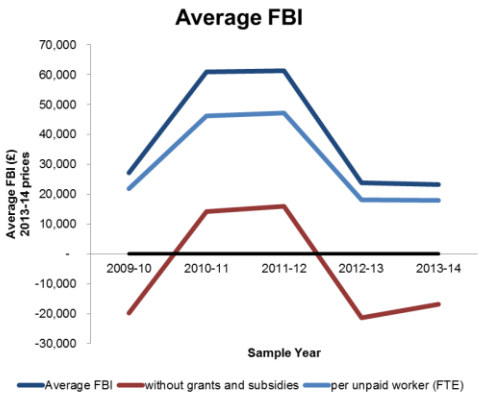
In the last year both input and output values for cereal farms have decreased, this combined with an average decrease in the value of grants and subsidies (down £5,000) resulting in an overall decrease in income for 2013-14 to leave the FBI value of cereal farms at £23,000. The total average outputs, (including income from diversification and grants and subsidies) and inputs for cereal farms were £223,000 and £200,000 respectively. The largest portion of the input costs was due to other inputs such as machinery, land and buildings.

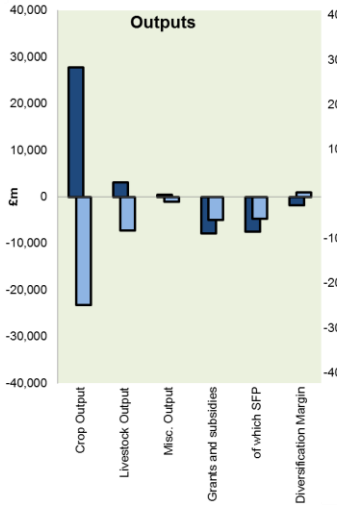
Over the last five years, FBI without subsidies has been below zero three times, ranging from -£21,000 in 2012-13 to £16,000 in 2011-12. In 2013-14 the average FBI without subsidies of cereal farms was -£17,000.

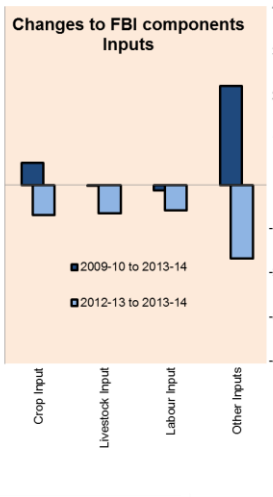
The average FBI/FTE for cereal farms of £18,000 is roughly equivalent to an hourly wage for unpaid labour of £9.42, almost equivalent to one and a half times the minimum agricultural wage in Scotland (£6.89). Approximately 38 per cent of farms

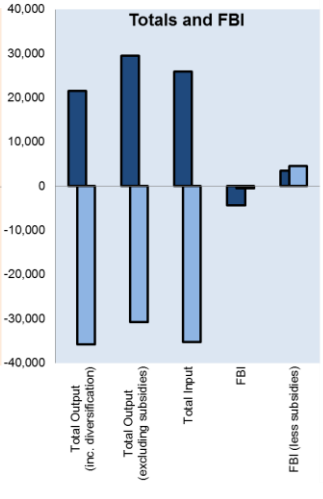
Cereals Farms

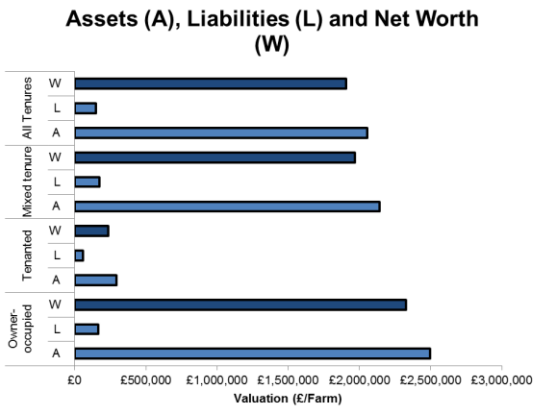


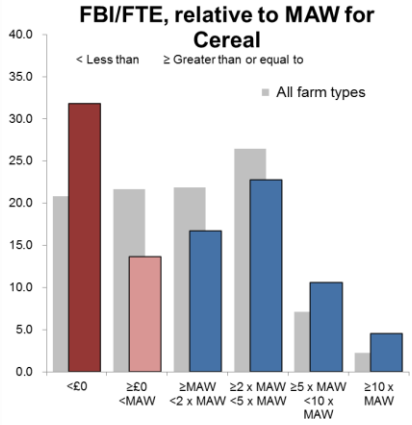


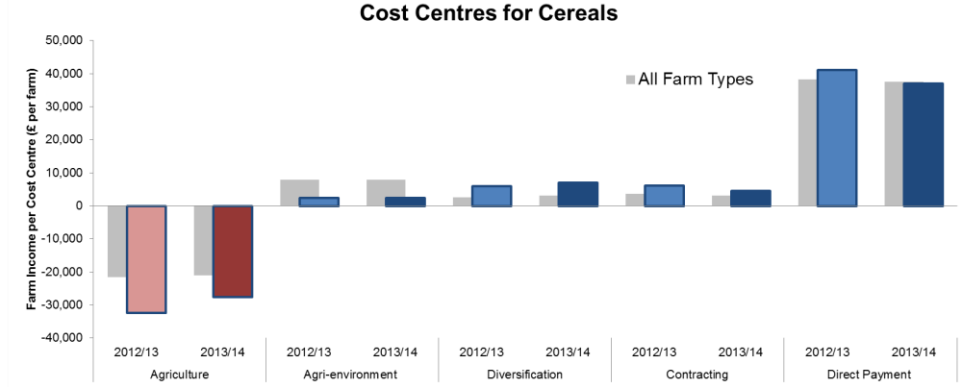












generated an FBI/FTE equivalent to at least twice the minimum agricultural wage per hour of unpaid labour. At the top end, 11 per cent generated between five and ten times the minimum agricultural wage, that is, between £33.40 and £68.90 per hour of unpaid labour and five per cent generated more. In contrast, the income of nearly half of all cereal farms (46 per cent) equated to less than the minimum agricultural wage, per unit of unpaid labour.

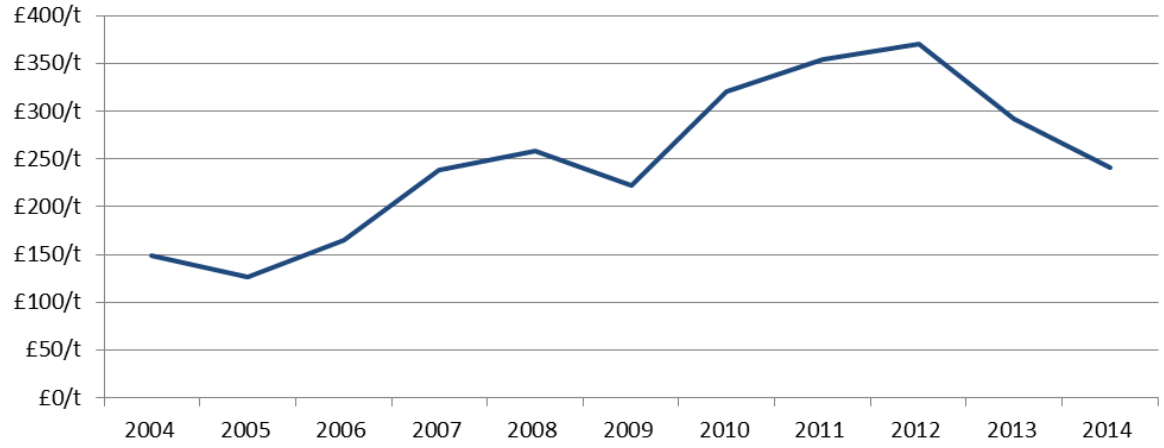
Cost centre analysis (see section 3.8) for cereal farms show a slight overall decrease in income as part of environmental activities, contracting and subsidies compared to 2012-13. Income from agricultural and diversified activities improved in 2013-14.

The average net worth of cereal farms of all tenures was £1,906,000; from £234,000 for tenanted farms, to £1,968,000 for mixed tenure farms and £2,328,000 for owner occupied farms. The average debt ratio (liabilities: assets) was seven per cent for all tenures of cereals farms but ranged between seven per cent for owner-occupied and 21 per cent for tenanted farms.

4.3 Other crops

4.3.1 Income from oilseed rape (Table A3)

Chart 4.7: Average annual output price for oilseed rape 2004 to 2014



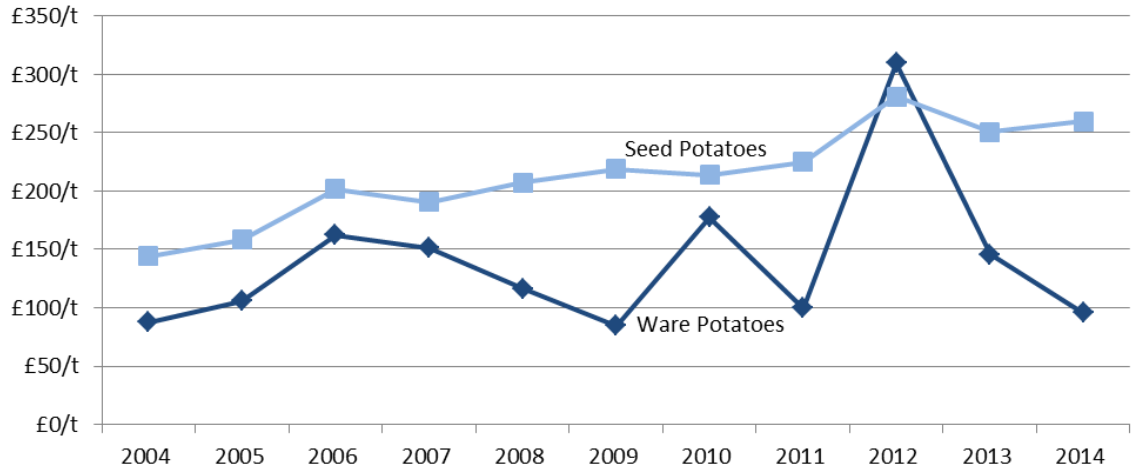
The average output price for oilseed rape increased steadily between 2005 and 2012, from £126 per tonne to £370 per tonne. In both 2013 and 2014 the output price fell, in 2014 by £51 per tonne (down 18 per cent). However, with production increasing by 36,000 tonnes (32 per cent) the resulting change in value was a £3 million increase (up nine per cent).

4.3.2 Income from potatoes (Table A4)

Potatoes generally account for around six per cent of total farm output, with sales in 2014 being estimated at £170m.

Table A4 shows the components of the output valuation for potatoes. In 2014, main-crop ware potatoes accounted for an estimated 760,000 tonnes (66 per cent) of output, and seed potatoes 291,000 tonnes (25 per cent) – both these tonnages were relatively unchanged compared to 2013 with levels not yet returning to those seen in 2006 to 2011.

Chart 4.8: Average annual output prices for potatoes 2004 to 2014



The free-market price of ware potatoes was very high for the 2012 crop at £310 per tonne due to, and partially mitigating, the effect of poor yields. The price then decreased in 2013 and again in 2014 to £96 per tonne. It should be noted that since production is valued at the point it is used, the valuation for 2014 is partially based on the high prices received for the 2013 crop sold in the early part of 2014.

The price of seed potatoes has been more stable, with a general upward trend and only small year-to-year fluctuations, with a provisional price estimate of £260 per tonne in 2014.

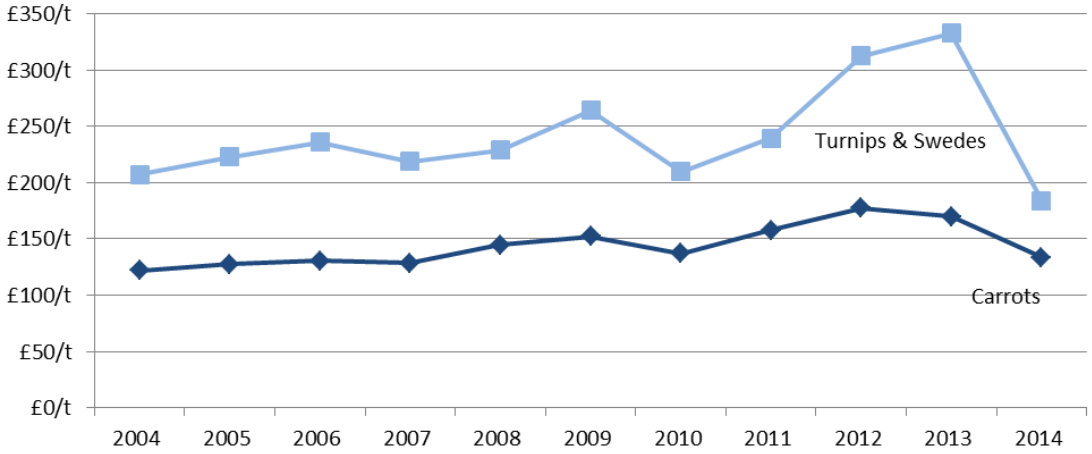
In 2014, the overall output value of potatoes decreased by £105 million (38 per cent), with the low ware price being the main factor.

4.3.3 Income from vegetables (Table A4)

Vegetables generally account for around four per cent of total farm output, with sales in 2014 being estimated at £131m. The valuation of vegetables is comprised of many different crops. Table A4 shows information for the key crops.

Over the past ten years the output value of vegetables has increased by £68 million (111 per cent) to £131 million in 2013.

Chart 4.9: Average annual output prices for carrots and turnips & swedes, 2004 to 2014



Carrots were the most valuable vegetable crop in Scotland, with a value of £31 million in 2014, double the 2004 value of £15 million, with increased areas (up 55 per cent) and prices (up nine per cent) driving this longer term trend. Turnips and swedes were the second largest vegetable crop in 2014 in terms of production (65,000 tonnes) though not in value (£12 million, compared to sprouts at £15 million) following a general upward trend and only small year-to-year fluctuations.

4.3.4 Income from fruit (Table A4)

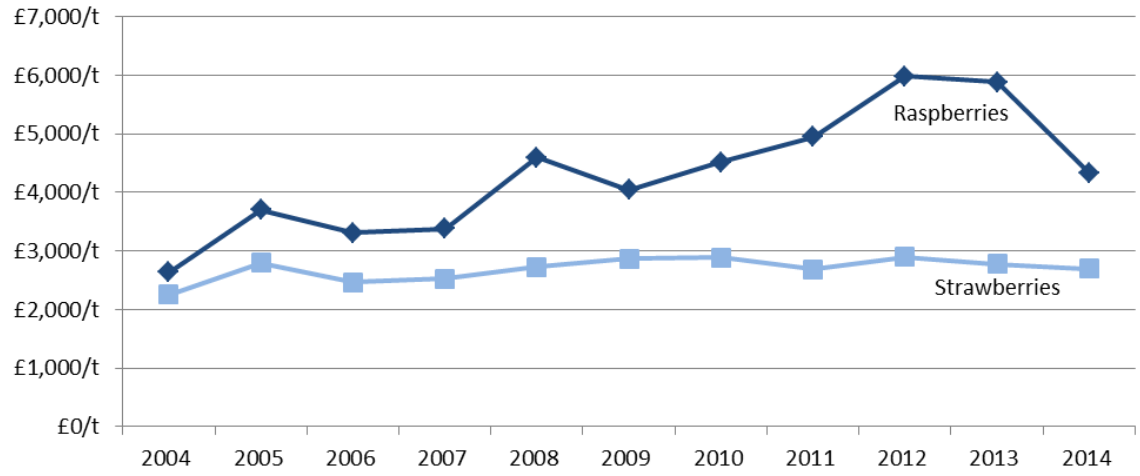
Fruit generally accounts for around three per cent of total farm output. Over the past ten years the output value of soft fruit has increased by £55 million (153 per cent) to an estimated £92 million in 2014.

Table A4 shows that in 2014, strawberries accounted for £68 million (74 per cent of the overall value of soft fruit) and raspberries £13 million (14 per cent).

Over the past decade the value of strawberries has increased by £43 million (175 per cent). This was mostly due to a 14,000 tonne (130 per cent) increase in production, along with an increase in average prices of £445 per tonne (20 per cent).

The value of raspberries increased by £3.9 million (44 per cent) over the same period, with estimated production now lower than in 2004 and considerably lower than in 2007 to 2009, but with prices 64 per cent higher, even after the large fall in price seen in 2014.

Chart 4.10: Average annual output prices for raspberries and strawberries 2004 to 2014



4.4 General cropping farms FBI (Table B1)

Accounting for inflation, between 2009-10 and 2013-14 the average FBI of general cropping farms increased by around 33 per cent. This was due to an increase in the output value of crops and fall in the crop and labour input costs.

In the last year both input and output values for general cropping farms have decreased, this combined with an average decrease in the value of grants and subsidies (down £3,000) has resulted in an overall decrease in income for 2013-14 to leave the FBI value of general cropping farms at £36,000. The total average outputs, (including income from diversification and grants and subsidies) and inputs for general cropping farms were £267,000 and £231,000 respectively. The largest portion of the input costs was due to fertiliser and other inputs such as machinery, land and buildings.

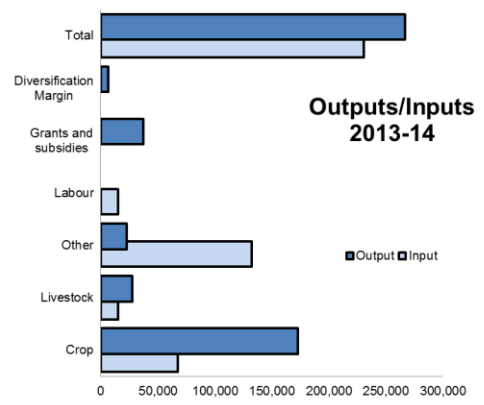
Over the last five years, FBI without subsidies has been below zero twice, ranging from -£21,000 in 2009-10 to £28,000 in 2010-11. In 2013-14 the average FBI without subsidies of general cropping farms was -£900.

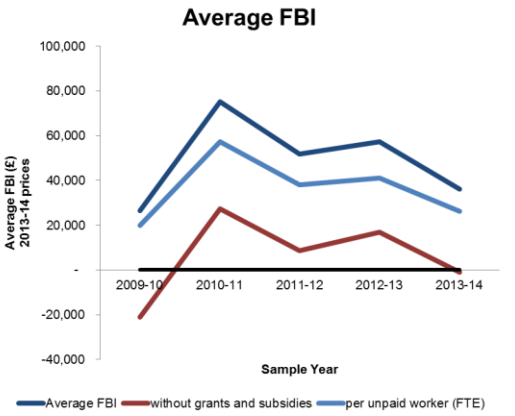
The average FBI/FTE for general cropping farms of £26,000 is roughly equivalent to an hourly wage for unpaid labour of £13.81, equivalent to almost twice the minimum agricultural wage in Scotland. Approximately 46 per cent of farms generated an FBI/FTE equivalent to at least twice the minimum agricultural wage per hour of unpaid labour. At the top end, nine per cent generated between five and ten times the minimum agricultural wage, that is, between £33.40 and £68.90 per hour of unpaid labour and six per cent generated more. In contrast, 40 per cent of general cropping farms generated incomes equivalent to less than the minimum agricultural wage.

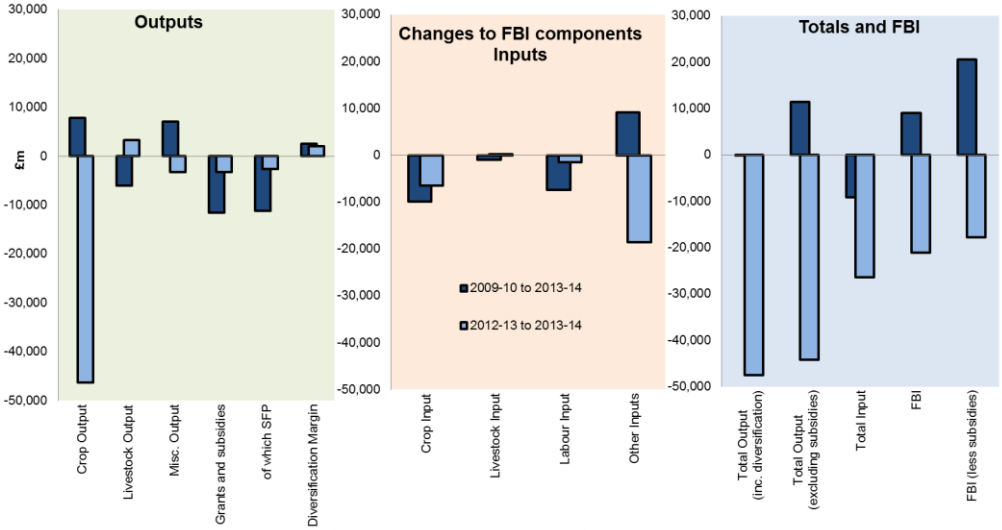
Cost centre analysis for general cropping farms show an overall decrease in income as part of agricultural and environmental activities as well as contracting and subsidies compared to 2012-13. Income from diversification increased in 2013-14.

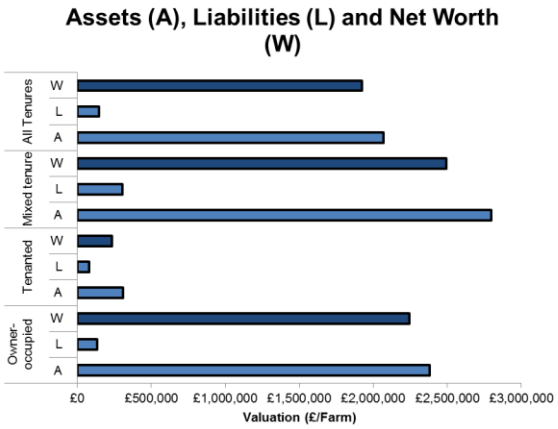
The average net worth of general cropping farms of all tenures was £1,922,000; from £232,000 for tenanted farms, to £2,244,000 for owner occupied farms and £2,492,000 for mixed tenure farms. The average debt ratio (liabilities: assets) was seven per cent for all tenures of general cropping farms but ranged between six per cent for owner-occupied and 25 per cent for tenanted farms.

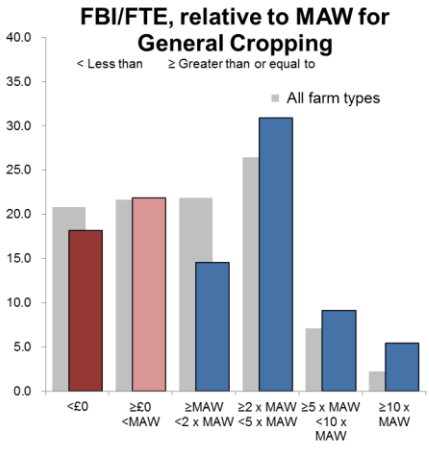
General Cropping Farms

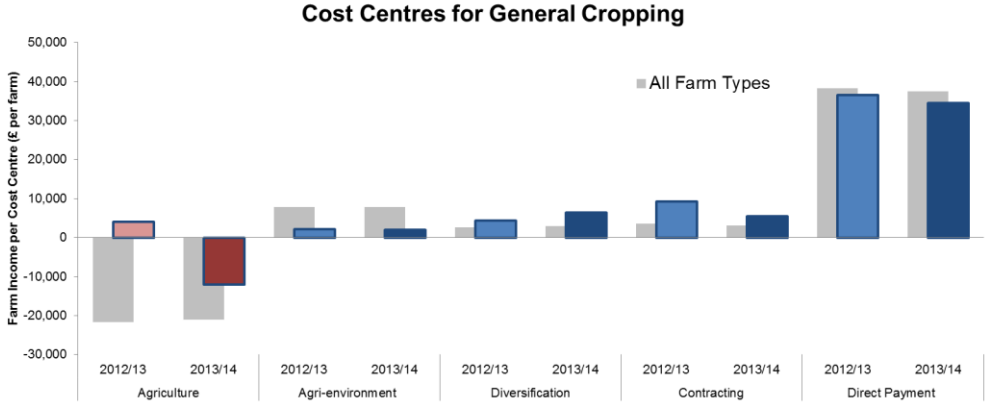












4.5 Crop enterprises (Table B12)

Overall average gross margins for crop enterprises ranged from £454 per hectare for winter barley enterprises to £815 per hectare for winter wheat, with the exception of potato enterprises (a combination of ware, seed and mixed potato enterprises) which stood out at £4,221 per hectare.

Where sample sizes were sufficient to allow comparison between high and low performing enterprises, gross margins of high performers in 2013-14 were around two to three times greater than that of low performers but, for spring oats, high performers achieved margins around four times that of the low performers.

For crop enterprises the differences in financial performance between high and low performing groups was due to the high performers achieving; higher sales prices per tonne which is expected to reflect generally higher quality, higher yields producing a greater volume of output per hectare, and better management of variable costs.

All crop enterprises have seen reductions in their overall average gross margin per hectare since 2012-13. This has been particularly marked for winter oats (down 32 per cent), spring oats and winter barley (both down 35 per cent). Winter oats enterprises experienced a 16 per cent reduction in production levels (due to a 14 per cent reduction in area and a two per cent fall in yield) combined with increased costs (up 17 per cent). Spring oats margins were also reduced by a fall in price per tonne (down 27 per cent) and increased costs (up 20 per cent), which lowered margins despite a four per cent increase in production levels. Winter barley margins decreased due to reduced yields (down by ten per cent) and price per tonne (down by 14 per cent). A small one per cent reduction in production costs could not offset these changes.

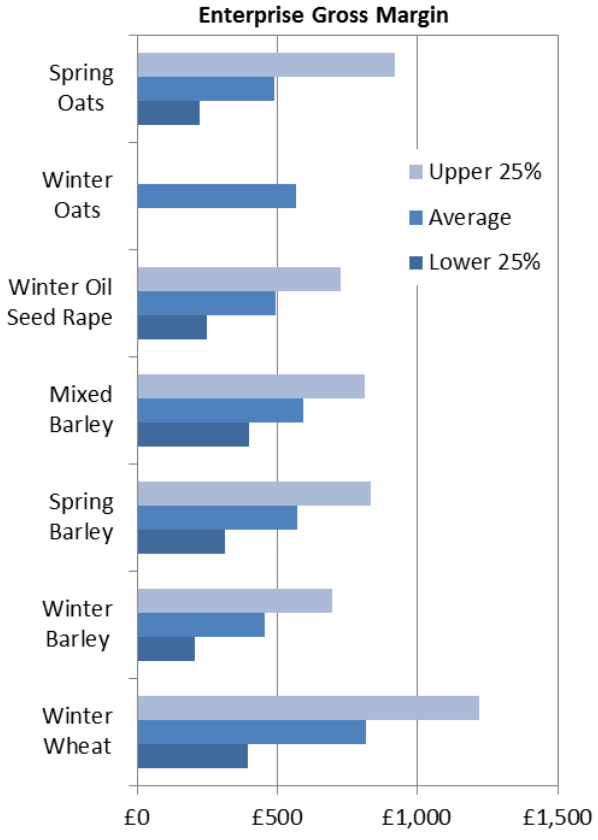
Taking account of the size of enterprises, potato (£97,000), mixed barley (£52,000) and spring barley (£29,000) achieved the highest average overall enterprise income. High performing spring, mixed and winter barley enterprises achieved a considerable advantage, with overall enterprise gross margins £39,000, £24,000 and £23,000 higher than those of low performing enterprises respectively. Winter oats (£9,000) achieved the lowest overall enterprise income.

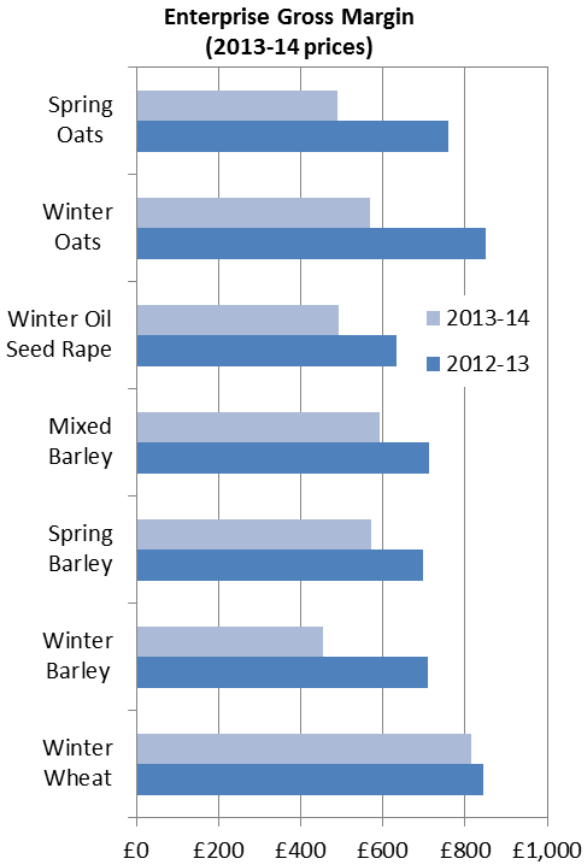
The group average output:input ratios (the return achieved per £1 spent) was also greatest for potatoes at 3.4 and winter wheat at 2.5. Winter oilseed rape and winter barley generated the lowest ratios at 1.9 each. Of the high performing enterprises (excluding potatoes), spring oats achieved the greatest output: input ratio at 4.4.

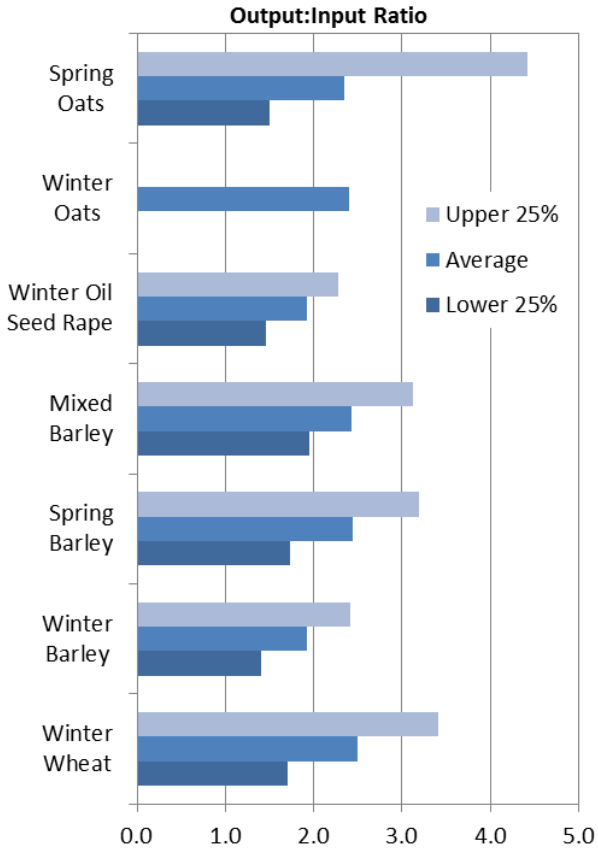
More detailed results, including sample size information, are available from the agriculture statistics web page, Enterprise Performance Analysis[9].

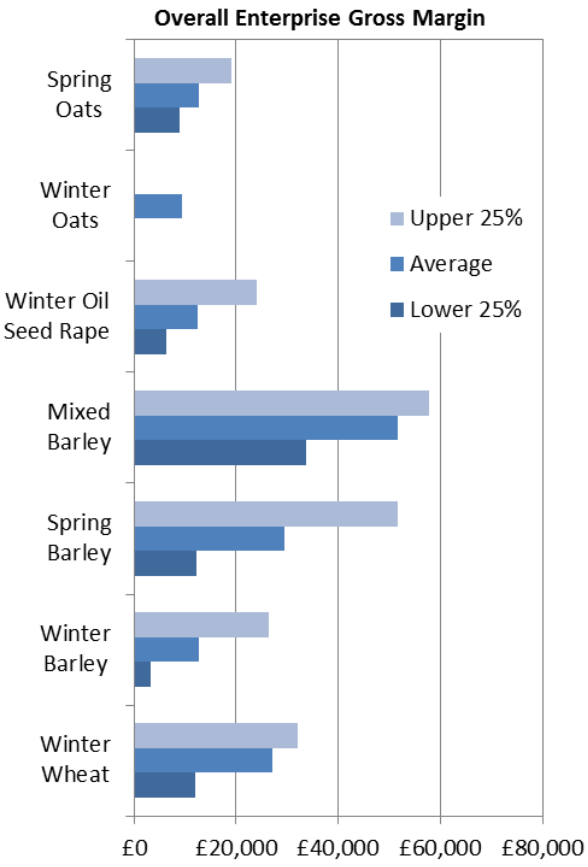
[9] www.gov.scot/Topics/Statistics/Browse/Agriculture-Fisheries/Publications/FASdata

Crops: Enterprise Gross Margin Measures









5. Livestock

5.1 Overview (Table C8)

Table C8 presents livestock numbers for each country in the UK and shows that, in June 2014, Scotland had 1.79 million cattle, 6.69 million sheep, 316,000 pigs and 14.7 million poultry.

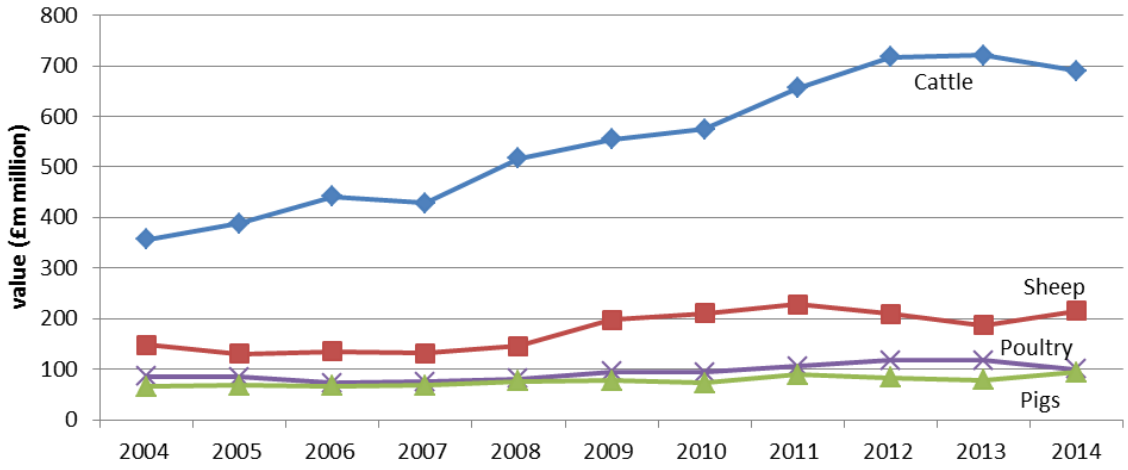
5.1.1 Livestock by LFA/non-LFA (Table C9)

Table C9 shows the balance between livestock on LFA and non-LFA holdings in Scotland. It shows that cattle and sheep tended to be located on LFA holdings, with 72 per cent of cattle and 90 per cent of sheep being located on holdings in these areas, reflecting the large areas of grassland and rough grazing in these areas. (LFA accounts for 86 per cent of agricultural land.) In contrast, pigs and poultry tended to be located on non-LFA holdings (81 per cent and 79 per cent respectively) due to their lower dependence on large areas of agricultural land.

5.1.2 Income from livestock (Tables A1, A5)

Livestock (excluding livestock products) accounts for just under 40 per cent of total farm output, being estimated at £1.12 billion in 2014. Chart 5.1, which shows output for finished and store, but excludes subsidies, illustrates that cattle remains the biggest earner for Scottish livestock, accounting for almost £690 million, or 61 per cent of livestock outputs.

Chart 5.1 Output value of livestock (excluding subsidies) 2004-2014



Charts 5.2 and 5.3 illustrate the varying effect of quantity and price. The greatest volume produced was in beef, accounting for almost half of production by weight. Poultry-meat, pig-meat and lamb/mutton are all showing broadly similar levels of production. Beef and lamb prices are much higher than pig and poultry meat, with the price of beef almost doubling over the past decade. Lamb prices have shown some fluctuation over the past few years, and pig prices have risen steadily.

Chart 5.2 Output volume of meat production (dressed carcass weight) 2004-2014

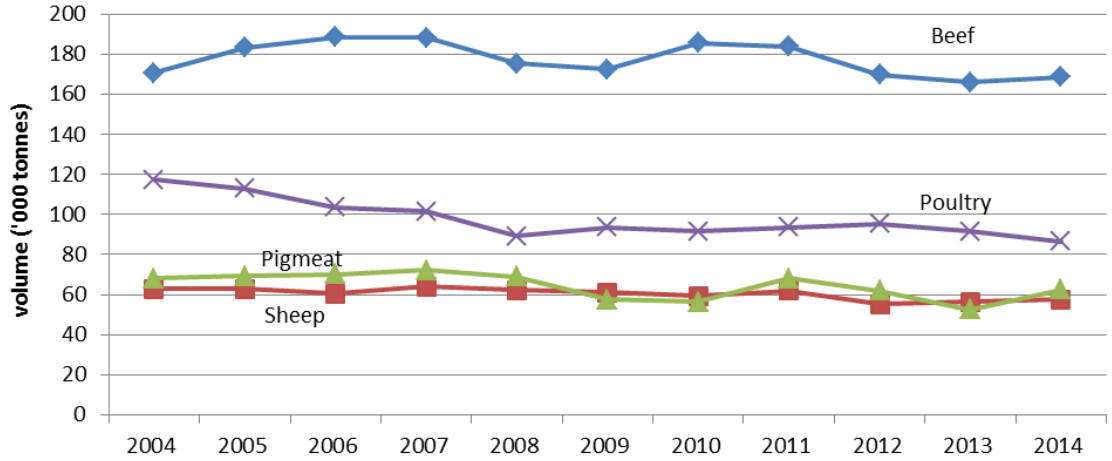
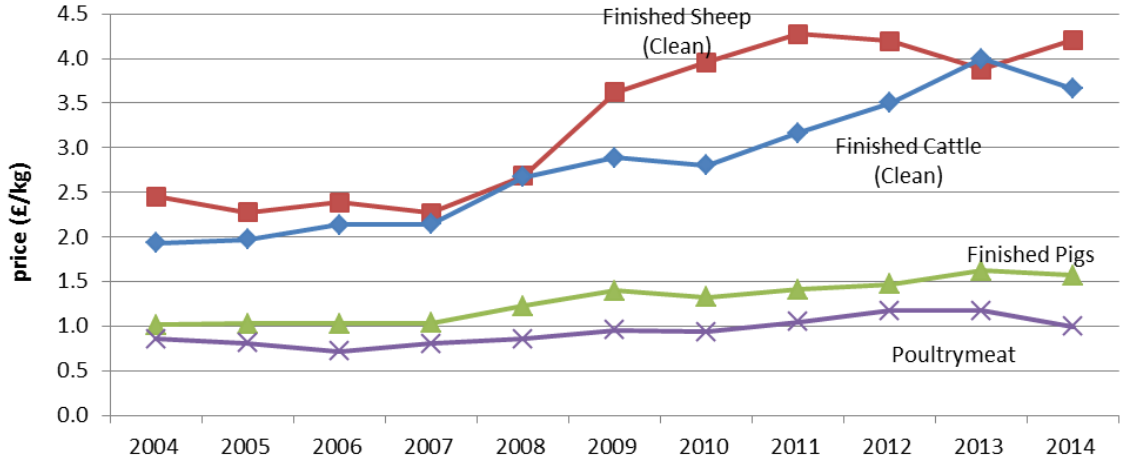


Chart 5.3 Annual average output price of finished livestock 2004-2014

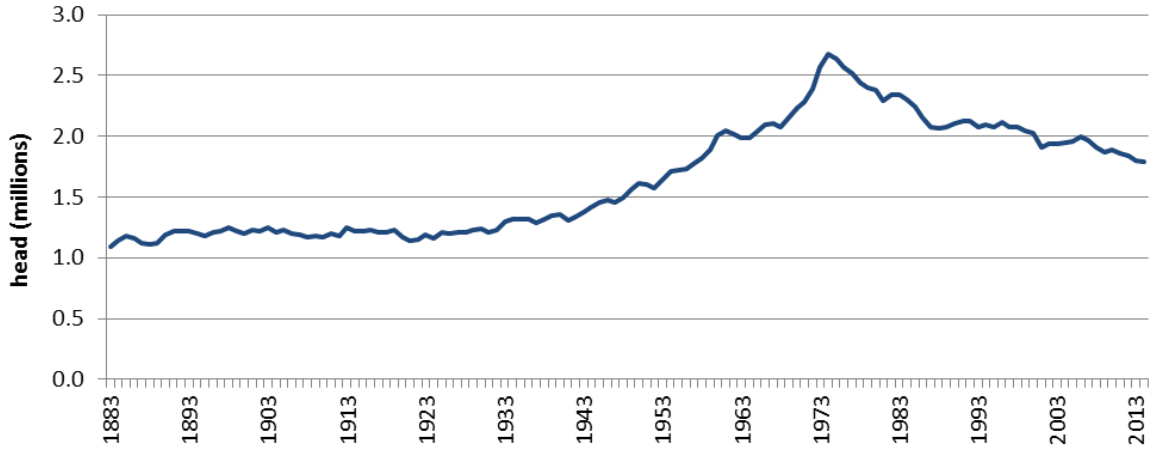


More detail is given in the individual sections that follow.

5.2 Cattle

Chart 5.4 shows that the number of cattle in Scotland has been steadily falling since an historical peak of 2.7 million in 1974. Prior to that it had risen slowly from a constant 1.2 million in the first three decades of the 20th century. Over half of that increase had been lost by 2014.

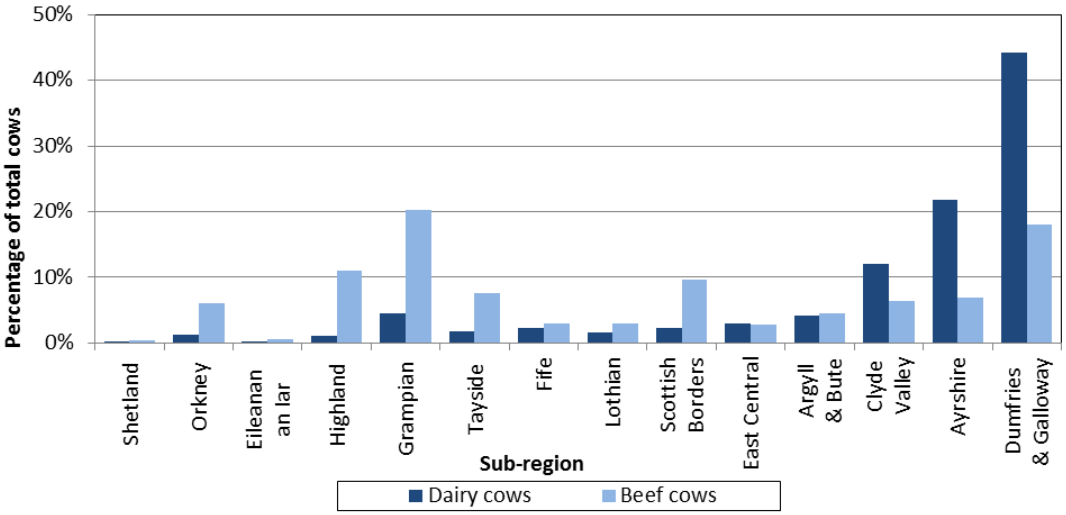
Chart 5.4: Number of cattle in Scotland, 1883-2014



5.2.1 Distribution of dairy and beef herds (Table C10(i), C10(ii))

In 2014 there were 1.79 million cattle in Scotland. The greatest number of cattle were located in Dumfries & Galloway (429,000 cattle or 24 per cent of the total) while 359,000 were in Grampian (20 per cent). Ayrshire (191,000 or 11 per cent), the Clyde Valley (139,000 or eight per cent), Scottish Borders (131,000 or seven per cent) and Highlands (127,000 or seven per cent) also had relatively high numbers of cattle.

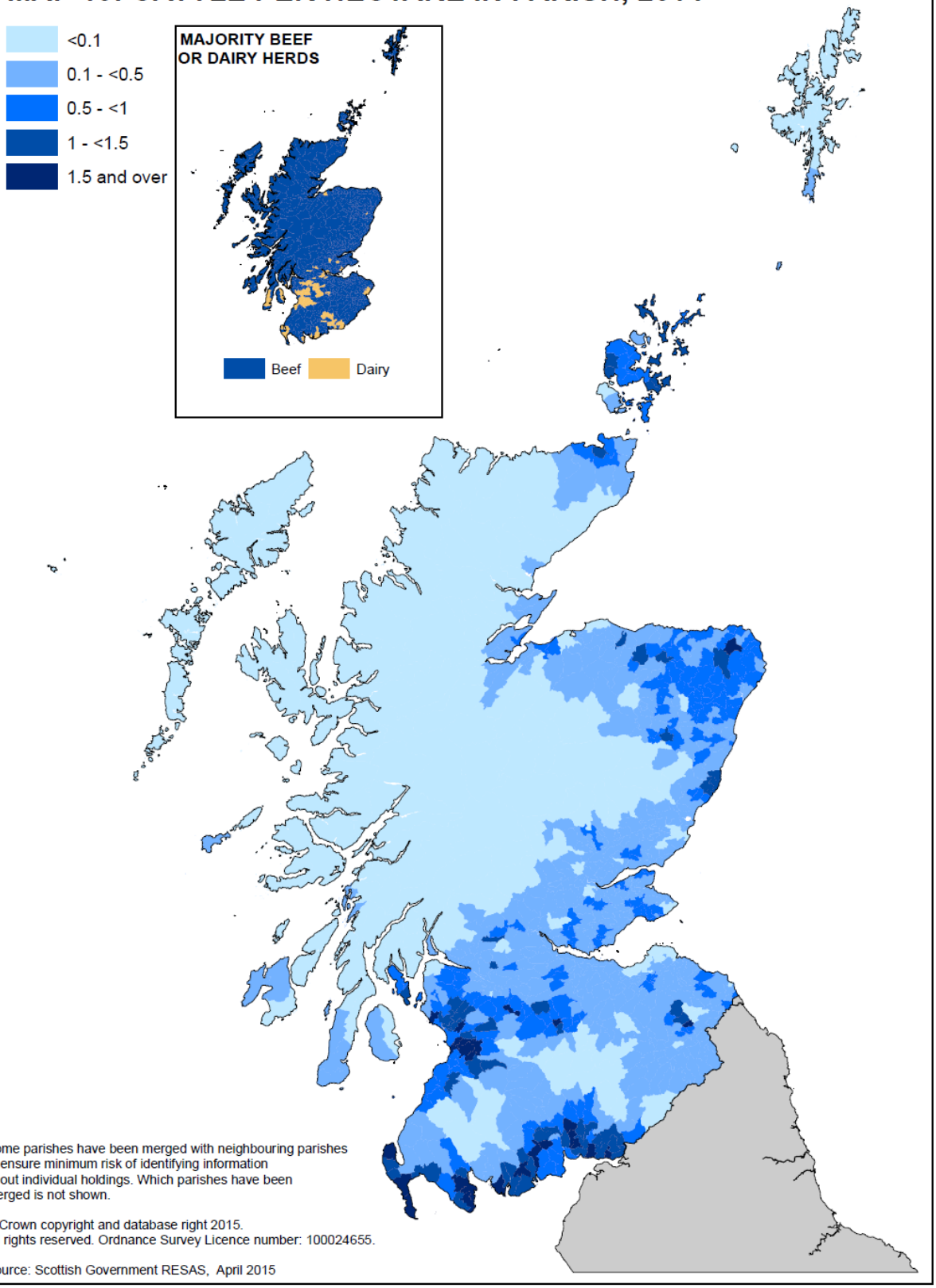
Chart 5.5: Distribution of cattle by sub-region, June 2014



Dairy cows[10] totalled 170,000 in June 2014, of which just over three quarters were located across the south western sub-regions of Dumfries & Galloway (74,900 or 44 per cent), Ayrshire (36,900 or 22 per cent) and the Clyde Valley (20,400 or 12 per

[10] "Dairy cows" refers to female dairy cattle aged two years and over, with offspring

MAP 10: CATTLE PER HECTARE IN PARISH, 2014



Some parishes have been merged with neighbouring parishes to ensure minimum risk of identifying information about individual holdings. Which parishes have been merged is not shown.

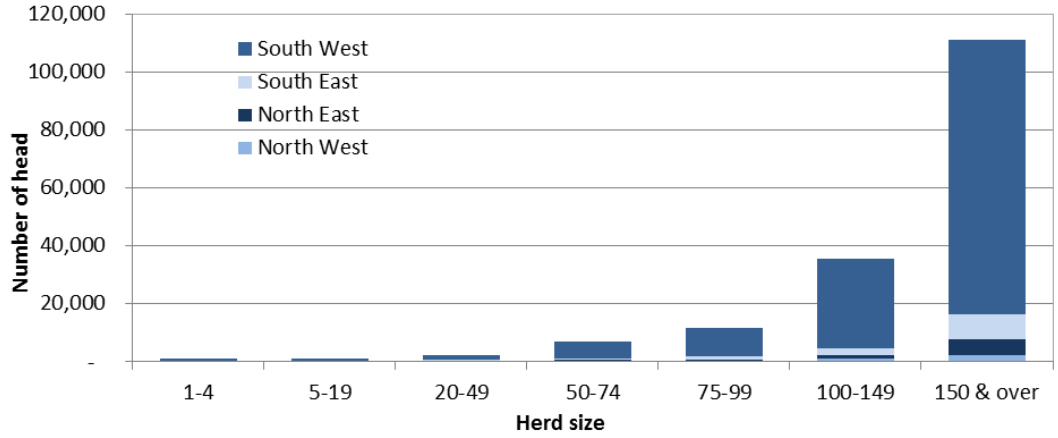
Source: Scottish Government RESAS, April 2015

cent). In contrast, beef cows[11], which totalled 436,000, had a wider regional spread, with large numbers evident in more northerly sub-regions such as Grampian (88,700 or 20 per cent) and Highland (47,800 or 11 per cent) as well as Dumfries & Galloway (78,300 or 18 per cent) and the Scottish Borders (42,100 or ten per cent). Map 10 illustrates that the highest density of cattle are to be found in the south-west and north-east. In addition, the inset map shows that beef predominates over dairy in most areas apart from patches in the south west of Scotland.

5.2.2 Size of dairy and beef herds (Tables C11, C12)

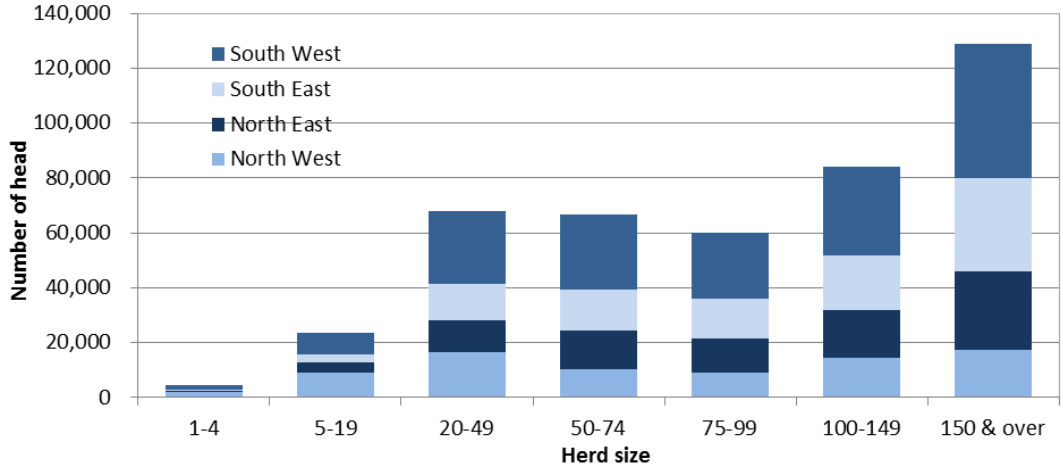
Chart 5.6 shows that almost two-thirds (65 per cent) of dairy cows were in herd sizes of 150 or more, totalling 111,000. A further 35,500 (21 per cent) were in herd sizes of between 100 and 149, with the remaining 23,100 (14 per cent) in herd sizes less than 100. This illustrates the concentrated distribution of the dairy sector.

Chart 5.6: Dairy cows by region and herd-size group, June 2014



The distribution of beef cows is less skewed, as shown in chart 5.7. The largest proportion (30 per cent) of beef cows were in a herd size of 150 or more, totalling 129,000 cows. Whereas 65 per cent of dairy cows were held in holdings with herds of 150 cattle and over, a similar proportion (63 per cent) among beef cattle was accounted for by holdings with herds of 75 cattle and over.

Chart 5.7: Beef cows by region and herd-size group, June 2014



[11] "Beef cows" refers to female beef cattle aged two years and over, with offspring

5.2.3 Income from cattle (Table A5)

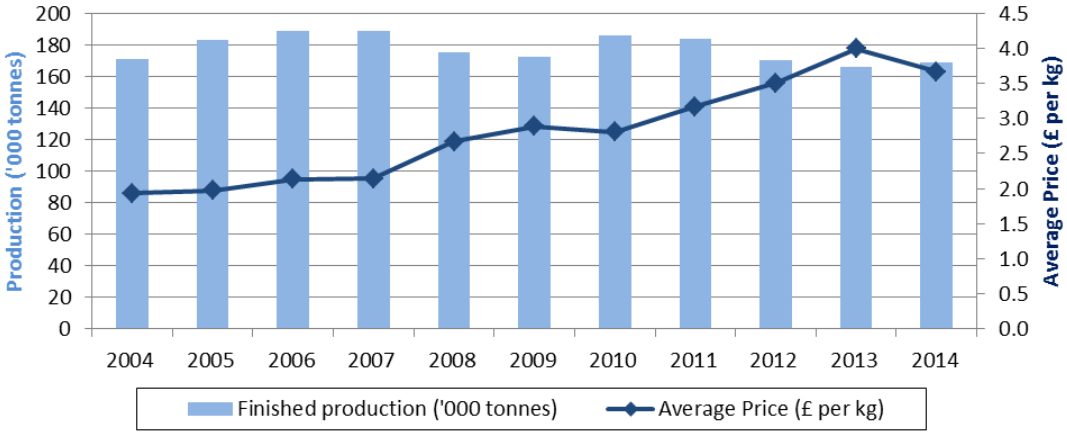
Over the past decade the total output value of finished and store livestock, excluding related subsidies, has increased by £333 million (93 per cent) to £690 million in 2014 (chart 5.1). The value has increased each year with the exception of 2007 and 2014. Two of the largest increases occurred in 2008 (£88 million) and 2011 (£81 million). Output from cattle equates to about 23 per cent of total agricultural output.

Tables A5 and A6 provide the detail behind these livestock valuations including numbers of livestock, weight of meat production, average output prices and stock change valuations.

In 2014, the output value of store cattle and calves was £49.8 million, similar to levels in 2011, a decrease of £22 million from 2013 (31 per cent).

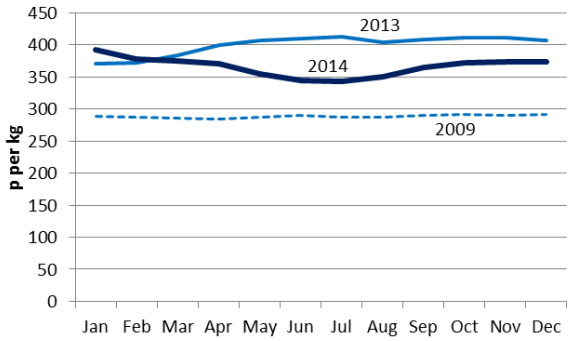
Total beef production in 2014 (including cull of older cattle) was at 169,000 tonnes, remaining fairly stable over the past ten years, with some higher levels in the intervening years (chart 5.2). Chart 5.8 shows that finished beef production increased slightly in 2014, halting a trend of small decreases each year since 2010.

Chart 5.8: Finished cattle production and average price, 2004-2014



Clean finished cattle prices had risen in each year throughout the past ten years, except 2010, up from an average of £1.93 per kg in 2004 to £4.00 per kg in 2013, a rise of 107 per cent. This trend has been the key factor in the large increase in the output value of cattle. However there was an eight per cent fall in price in 2014 to £3.66 per kg.

Chart 5.9 Monthly cattle marts prices in 2009, 2013 and 2014



Prices fell in the first part of 2014, from 393p per kg in January to 343p per kg in July, with prices then rising from August ending the year at 374p per kg.

5.2.4 Specialist Cattle (LFA) FBI (Table B1)

Accounting for inflation, between 2009-10 and 2013-14 the average FBI of specialist cattle (LFA) farms decreased by around 49 per cent, to the lowest level in five years. This decrease was due to a rise in input costs, especially livestock-related and crop-related costs and a fall in subsidies.

In the last year input costs and output value for specialist cattle (LFA) farms have both increased, resulting in an overall decline in profits for 2013-14. The average value of grants and subsidies increased (up £400) to leave the FBI value of specialist cattle (LFA) farms at £25,000. The total average outputs, (including income from diversification and grants and subsidies) and inputs for specialist cattle (LFA) farms were £185,000 and £160,000 respectively. The largest portion of the input costs was due to feed and other inputs such as machinery, land and buildings.

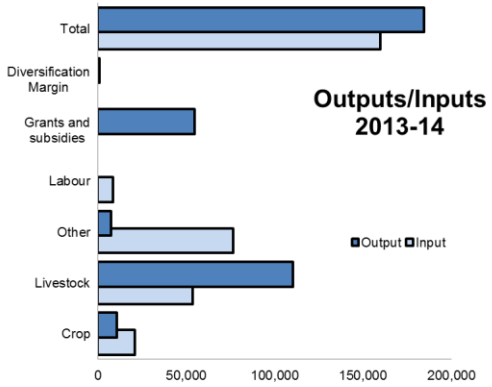
Over the last five years, FBI without subsidies has been below zero, ranging from -£10,000 in 2009-10 to -£30,000 in 2013-14.

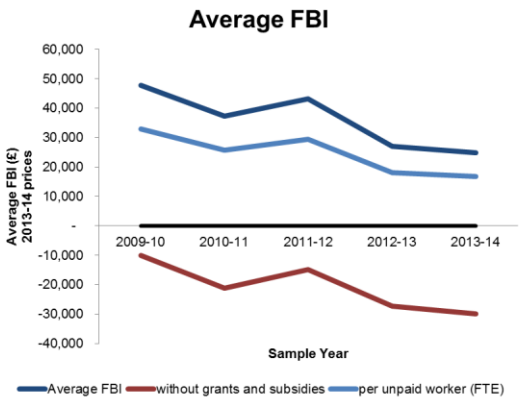
The average FBI/FTE for specialist cattle farms of £17,000 is roughly equivalent to an hourly wage for unpaid labour of £8.82, just under one and a half times the minimum agricultural wage in Scotland. Approximately 32 per cent of farms generated an FBI/FTE equivalent to at least twice the minimum agricultural wage per hour of unpaid labour. At the top end, five per cent generated between five and ten times the minimum agricultural wage, that is, between £33.40 and £68.90 per hour of unpaid labour and one per cent generated more. In contrast, 39 per cent of specialist cattle farms generated incomes equivalent to less than the minimum agricultural wage.

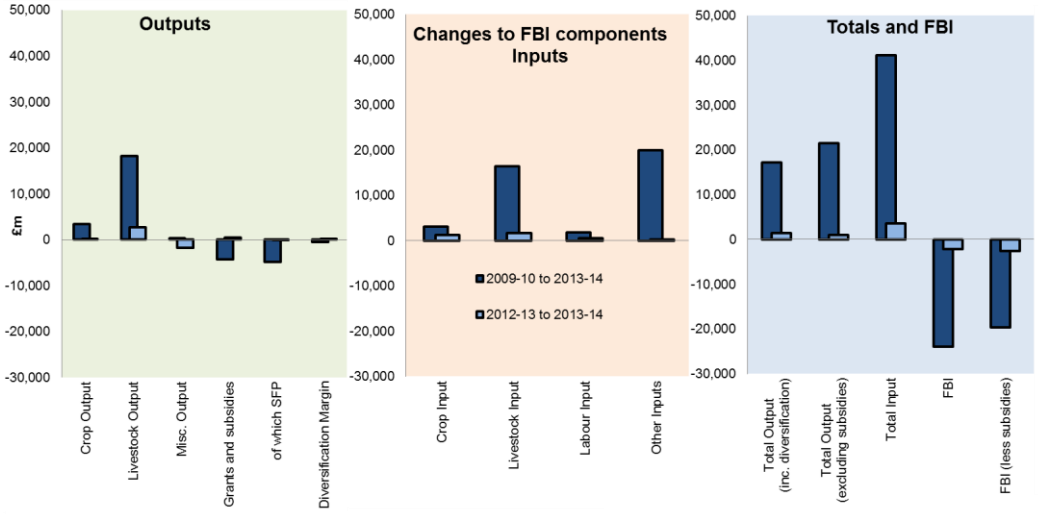
Trends in cost centres for specialist cattle (LFA) farms show an overall decrease in income from agricultural activities compared to 2012-13, costs remained steady for diversification, contracting, subsidies and agri-environmental activities.

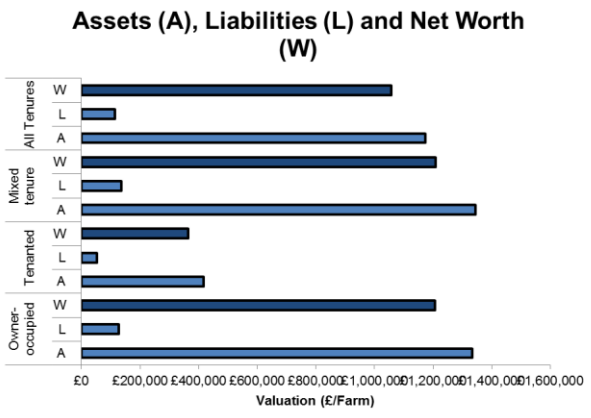
The average net worth of specialist cattle (LFA) farms of all tenures was £1,058,000; from £365,000 for tenanted farms, to £1,207,000 for owner occupied farms and £1,208,000 for mixed tenure farms. The average debt ratio (liabilities: assets) was ten per cent for all tenures of specialist cattle (LFA) farms but ranged between ten per cent for owner-occupied and 13 per cent for tenanted farms.

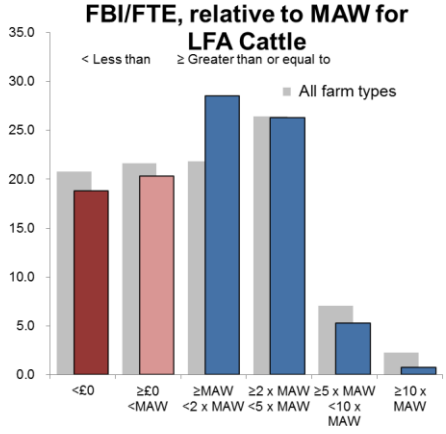
Specialist Cattle Farms (LFA)

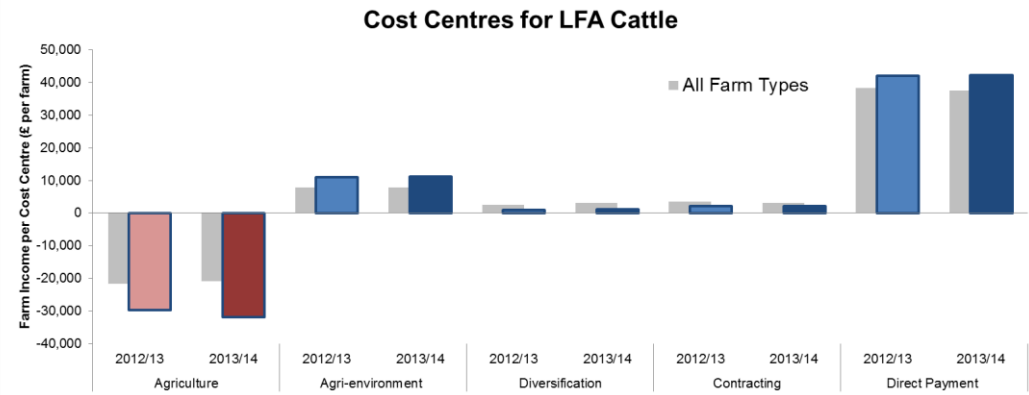












5.2.5 Income from milk and milk products (Table A6)

The production of milk and milk products accounted for an estimated £447 million of output in 2014, about 15 per cent of total farming output. The value of milk was equivalent to just over half the output from beef, and more than the value of meat from sheep, pigs and poultry put together. The value has increased by 73 per cent since 2004, with the most notable increases occurring in 2008 (25 per cent) and 2013 (16 per cent) with a further six per cent increase to 2014 (see chart 5.12).

Milk production has been fairly steady in the last ten years, with very little difference between 2013 production and the 2004 level, followed by a slight increase observed in 2014. After a settled period between 2004 and 2005 where prices and production remained stable, production fell by 60 million litres (just four per cent) between 2006 and 2009, but production is now at the highest level it has been over the decade.

Chart 5.10 Milk (including milk products) production and average price 2004 to 2014

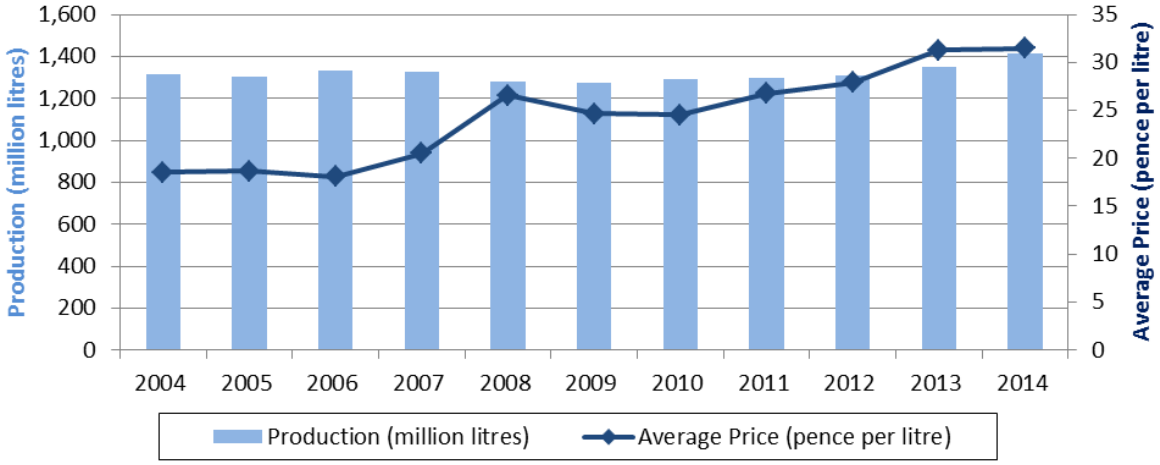


Chart 5.11 Monthly milk prices in 2009, 2013 and 2014

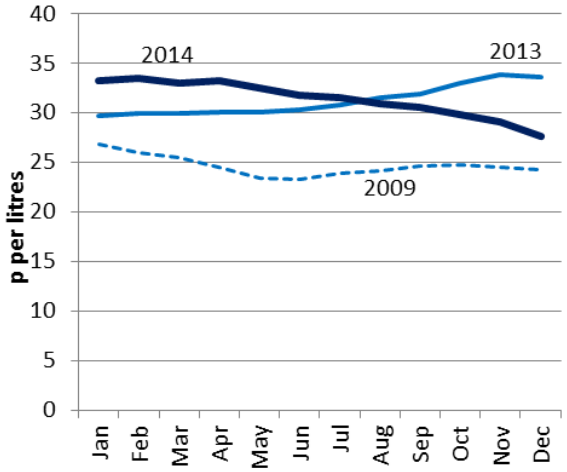
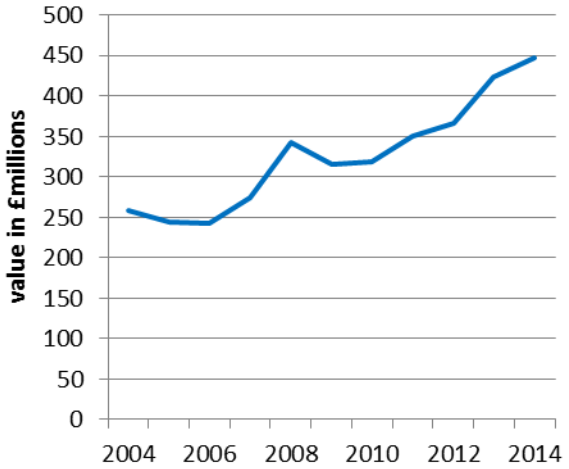


Chart 5.12 Output value of milk and milk products, 2004 to 2014



The average price of milk reached 31.5p per litre in 2014, up slightly from 31.3p per litre (0.7 per cent) in 2013, and compared with 18.5p per litre (70 per cent) in 2004. The monthly average price peaked at 33.9p per litre in November 2013, staying at

around 33p until May 2014, following which the price fell sharply, ending the year at 27.6p per litre.

In 2014 over half of the milk processed in Scotland was used directly as liquid milk for human consumption, with more semi-skimmed and skimmed than whole or standardised milk. Cheese production was the next largest use. Other uses included butter, cream, yoghurt, milk powders, condensed milk, and chocolate crumb.

Annex B of this publication looks at some historical papers on milk production from 1951.

5.2.6 Specialist dairy FBI (Table B1, B4)

Accounting for inflation, between 2009-10 and 2013-14 the average FBI of dairy farms decreased by around six per cent. This was due to an increase in the input costs for livestock and machinery, land and buildings.

In 2013-14 output values for dairy farms (up £67,000 on the previous year) increased by twice as much as the rise in input costs (up £35,000), resulting in an overall increase in income, almost back to levels last seen in 2010-11. Additionally, the average value of grants and subsidies has increased (up £2,000) to leave the FBI value of dairy farms at £80,000. The total average outputs, (including income from diversification and grants and subsidies) and inputs for dairy farms were £516,000 and £436,000 respectively. The largest portion of the input costs was due to livestock costs such as feed and other inputs such as machinery, land and buildings.

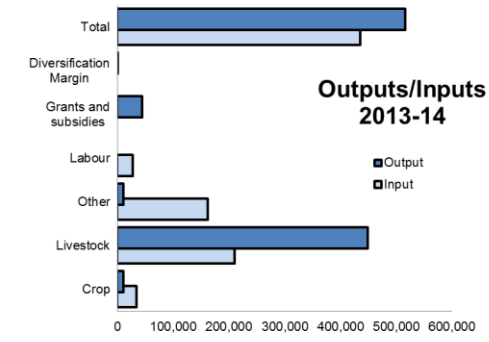
Table B4 compares input and output performance across FBI quartiles for 2013-14 and reveals noticeable differences in key characteristics. Upper quartile (high performing) dairy farms had an average herd size of 240 cows with a yield per cow of 7,549 litres, which sold at 32.31p per litre. Lower quartile farms averaged 150 cows producing 6,017 litres, selling at 30.75p per litre. This results in an average lower quartile FBI of -£6,000 and upper quartile FBI of £205,000.

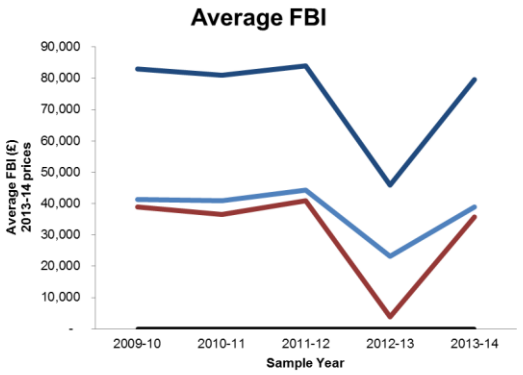
Over the last five years, FBI without subsidies has been kept above zero. It ranges from £4,000 in 2012-13 to £41,000 in 2011-12. In 2013-14 the average FBI without subsidies of dairy farms was £36,000.

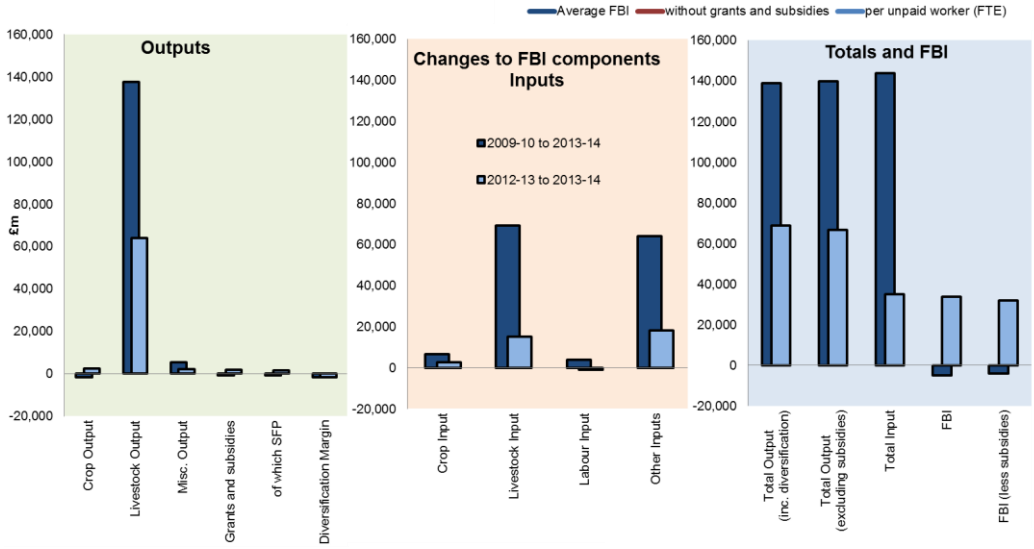
The average FBI/FTE for dairy farms of £39,000 is roughly equivalent to an hourly wage for unpaid labour of £20.45, almost equivalent to three times the minimum agricultural wage in Scotland. Approximately 60 per cent of farms generated an FBI/FTE equivalent to at least twice the minimum agricultural wage per hour of unpaid labour. At the top end, 18 per cent generated between five and ten times the minimum agricultural wage, that is, between £33.40 and £68.90 per hour of unpaid labour and four per cent generated more. In contrast, around a quarter of dairy farms (24 per cent) generated incomes equivalent to less than the minimum agricultural wage.

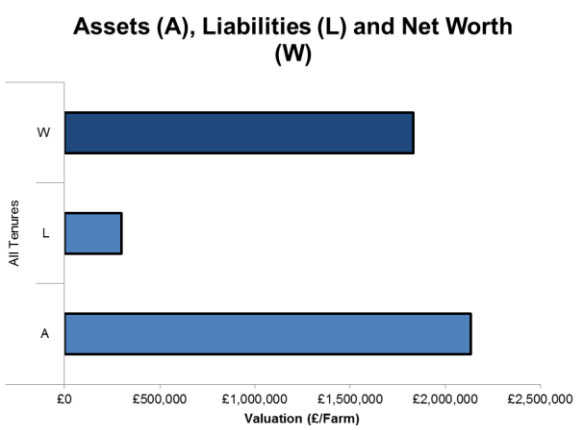
Cost centre analysis for dairy farms show an overall increase in income as agricultural activities, contracting and subsidies increased compared to 2012-13, income decreased for environmental activities and diversification.

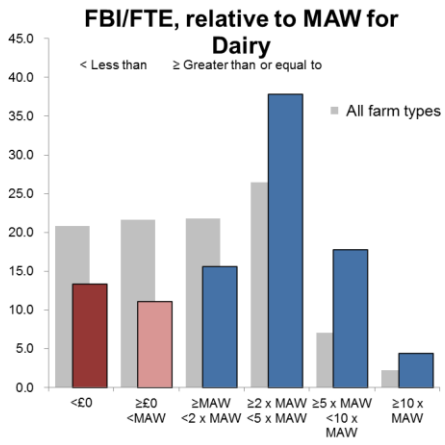
Dairy Farms

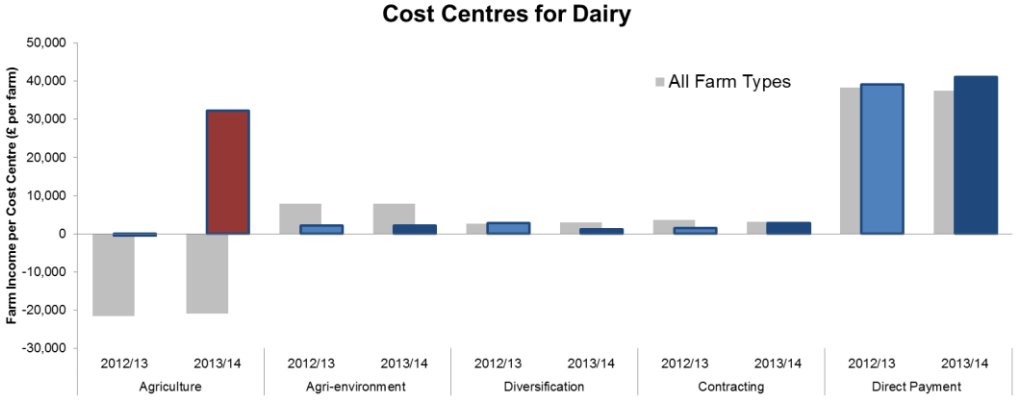

Outputs/Inputs 2013-14
Total
Diversification Margin
Grants and subsidies
Labour
Other
Livestock
Crop
Output
Input
0
100,000
200,000
300,000
400,000
500,000
600,000


Average FBI
Average FBI (£) 2013-14 prices
90,000
80,000
70,000
60,000
50,000
40,000
30,000
20,000
10,000
-
2009-10
2010-11
2011-12
2012-13
2013-14
Sample Year


Average FBI
without grants and subsidies
per unpaid worker (FTE)
Outputs
£m
Crop Output
Livestock Output
Misc. Output
Grants and subsidies
of which SFP
Diversification Margin
Changes to FBI components
Inputs
2009-10 to 2013-14
2012-13 to 2013-14
Crop Input
Livestock Input
Labour Input
Other Inputs
Totals and FBI
Total Output (inc. diversification)
Total Output (excluding subsidies)
Total Input
FBI
FBI (less subsidies)


Assets (A), Liabilities (L) and Net Worth (W)
All Tenures
W
L
A
£0
£500,000
£1,000,000
£1,500,000
£2,000,000
£2,500,000
Valuation (£/Farm)


FBI/FTE, relative to MAW for Dairy
< Less than
≥ Greater than or equal to
All farm types
45.0
40.0
35.0
30.0
25.0
20.0
15.0
10.0
5.0
0.0
<£0
≥£0 <MAW
≥MAW <2 x MAW
≥2 x MAW <5 x MAW
≥5 x MAW <10 x MAW
≥10 x MAW


Cost Centres for Dairy
All Farm Types
Farm Income per Cost Centre (£ per farm)
50,000
40,000
30,000
20,000
10,000
0
-10,000
-20,000
-30,000
2012/13
2013/14
Agriculture
Agri-environment
Diversification
Contracting
Direct Payment

The average net worth (assets minus liabilities) of dairy farms was £1.8m in 2013-14. The average debt ratio (liabilities: assets) was 14 per cent for all tenures of dairy farms.

5.2.7 Dairy and beef enterprises (Table B12)

Overall average gross margins for dairy and beef enterprises ranged from £187 per head for beef finishing enterprises to £396 per head for mixed dairy and beef enterprises, with the exception of dairy cow enterprises at £1,108 per head (equivalent to 15.4 pence per litre).

Where sample sizes were sufficient to allow comparisons between high and low performers, we can see that low performing dairy and beef enterprises generated considerably lower margins. Some low performing beef enterprises generated losses with dairy followers, mixed and finishing enterprises making an average loss, ranging from -£4 per head for mixed beef enterprises to -£68 per head for beef finishing. By comparison, high performers in these enterprises achieved gross margins between £407 per head and £692 per head.

High performing dairy cow enterprises made around twice the average gross margin compared to low performers, at £1,538 per head. At £497 per head, high performing lowland suckler herds made around 12 times the margin of low performing enterprises.

On dairy and beef enterprises the difference in financial performance was due to high performers achieving; higher sales prices per head (which is expected to reflect generally higher quality outputs), a greater increase in value due to improved technical performance, and better management of variable costs.

Dairy followers was the only enterprise group to see a fall in margins compared to the previous year. Overall the dairy follower average gross margin per head decreased by 32 per cent compared to 2012-13. Although sales prices increased by 13 per cent to £1,298 per head, higher variable costs (up 25 per cent to £815 per head) and a relatively poor increase from opening and closing valuations (at £85 per head) lead to a lower margin than in 2012-13.

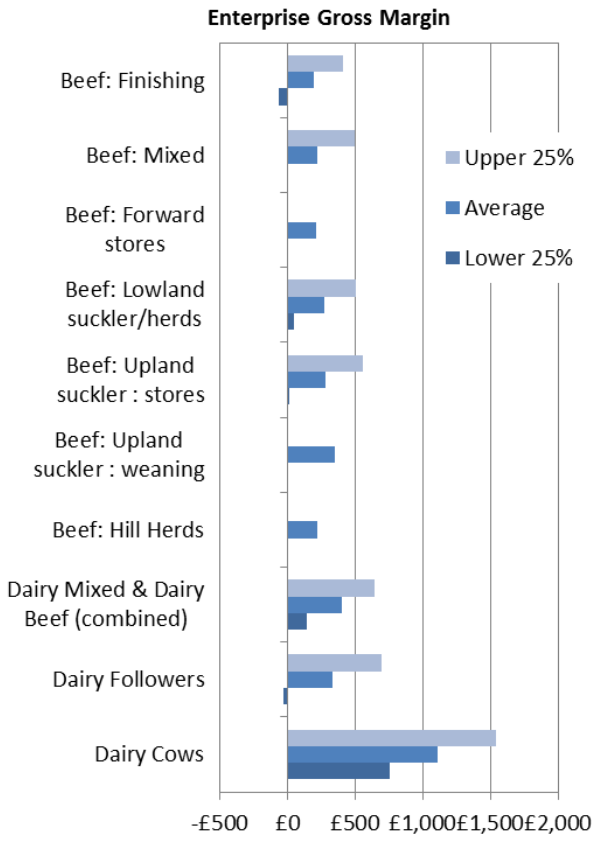
Upland suckler herds (less than six months), mixed beef enterprises and beef forward stores saw the largest increases in margins over the year (up 65 per cent, 54 per cent and 46 per cent respectively). Compared to 2012-13 the average margin for upland sucker herds (less than six months) increased. Despite a fall in sales prices (down 18 per cent) and a rise in variable costs (up three per cent) the value gained through technical performance (closing valuation minus opening valuation) increased to £133 in 2013-14, driving the increase in gross margin. Increased margins were also driven by technical performance in beef forward stores, where the average increase in value of cattle was £140. Again, this was despite a fall in sales price (down one per cent) and a rise in variable costs (16 per cent). While variable costs also increased for mixed beef enterprises (up three per cent) an 18 per cent increase in sales prices caused an overall increase in average gross margin, also outweighing a decline in value of cattle, which fell by £61 between the opening valuation and closing valuation.

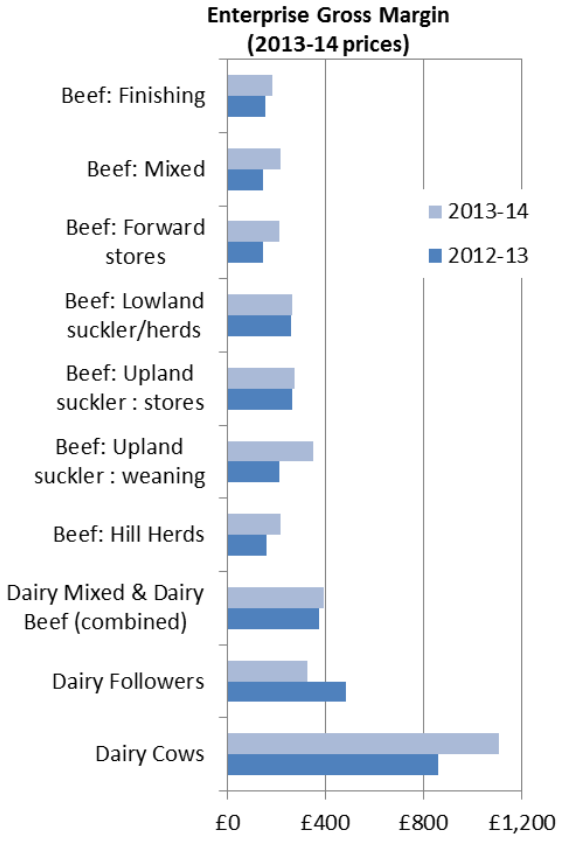
Taking account of the size of enterprises, dairy cow (£192,000), mixed dairy enterprises (£46,000) and dairy followers (£29,000) achieved the highest overall enterprise income. Beef forward stores (£10,000) and beef hill herds (£10,000) achieved the lowest. In contrast to gross margin results, the group average output: input ratios, the return achieved per £1 spent, ranged from 1.4 for dairy followers, beef hill herds and finishing enterprises, to 2.0 for dairy cow enterprises.

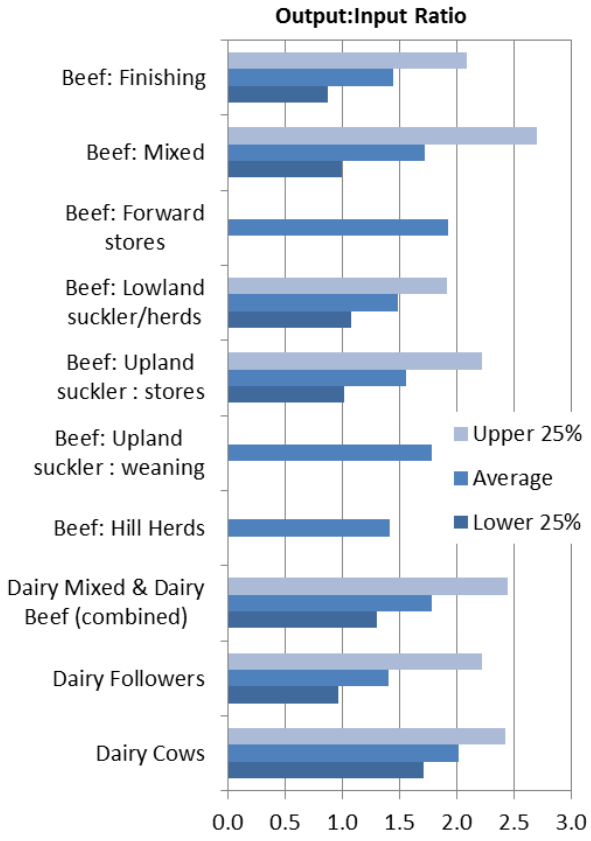
More detailed results, including sample size information, are available from the agriculture statistics web page, Enterprise Performance Analysis[12].

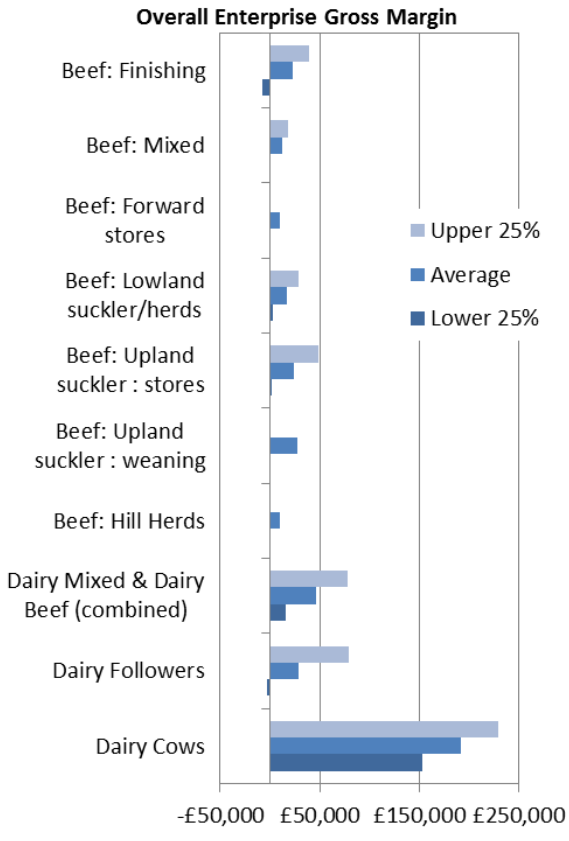
[12] www.gov.scot/Topics/Statistics/Browse/Agriculture-Fisheries/Publications/FASdata

Dairy and Beef: Enterprise Gross Margin Measures





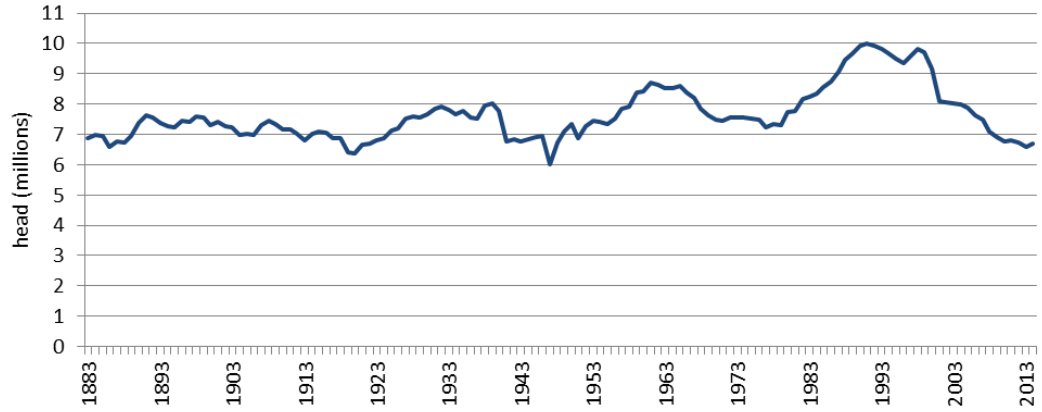




5.3 Sheep

The number of sheep in Scotland has gone through a series of fluctuations in the past 125 years, with peaks in the thirties, the sixties and the nineties. Numbers have been just below seven million for the last five years, levels last seen in the 1940s.

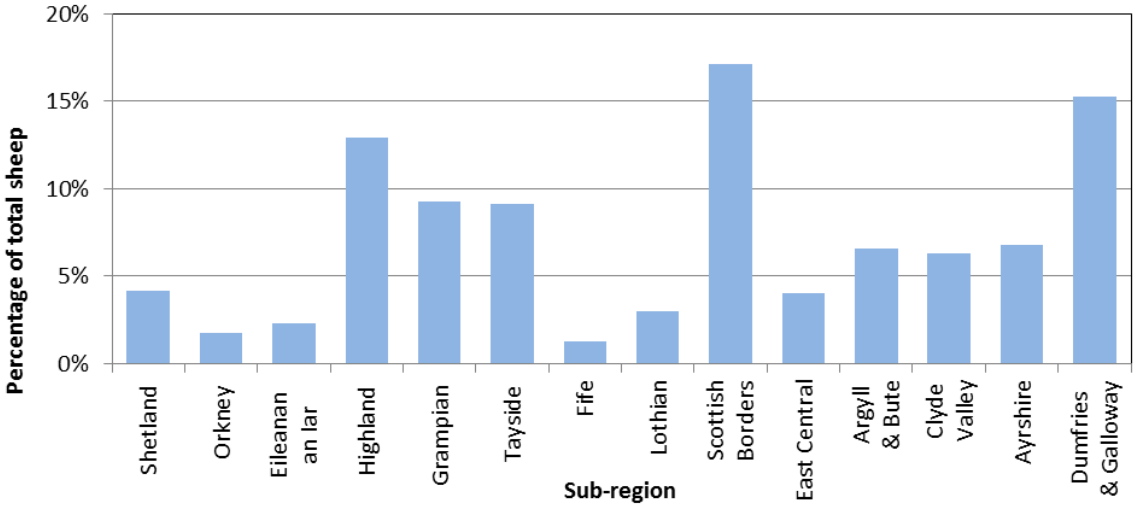
Chart 5.13: Number of sheep in Scotland, 1883-2014



5.3.1 Distribution of sheep (Table C10(i), C10(ii))

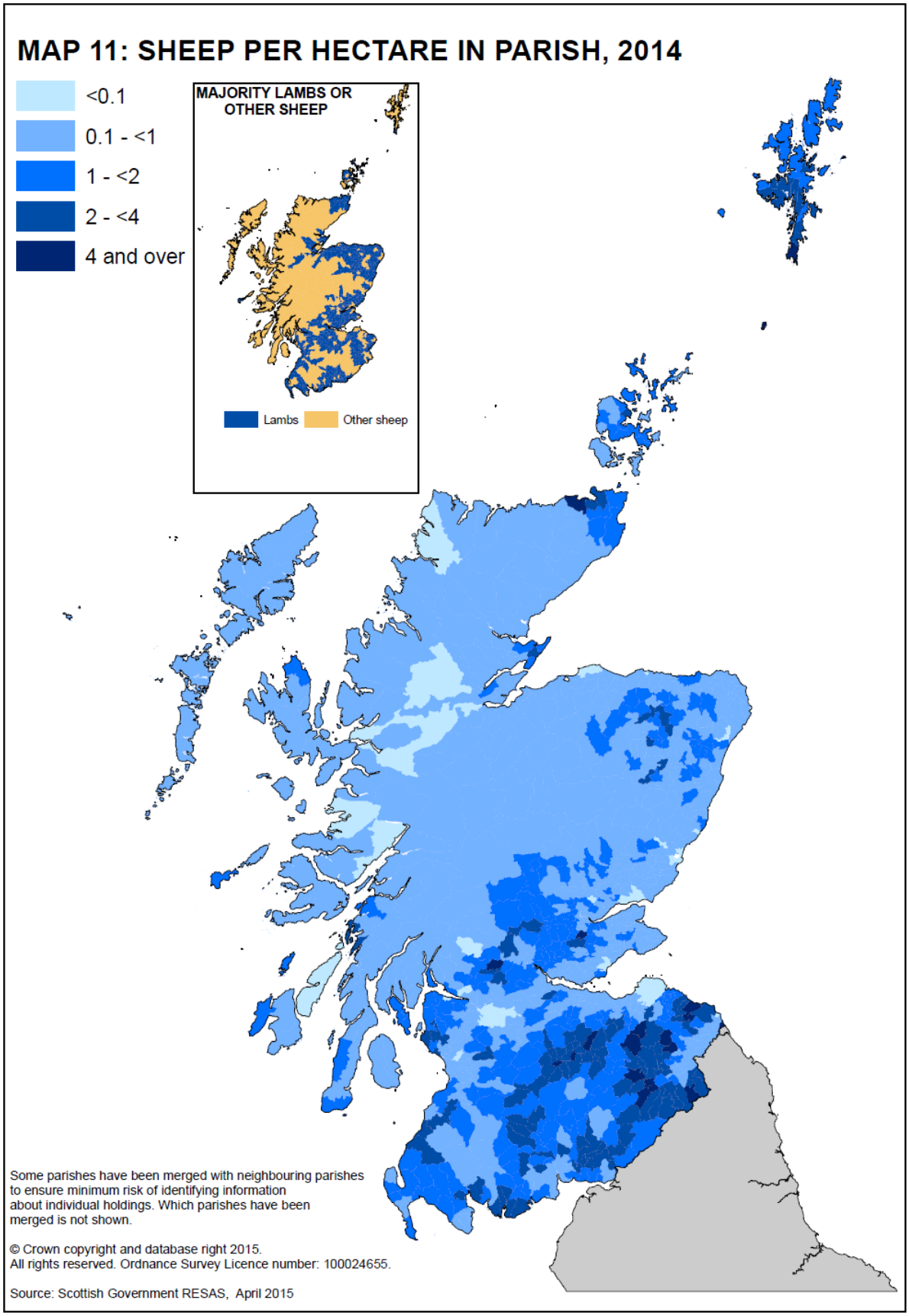
There were 6.69 million sheep in Scotland in June 2014. Areas with the highest numbers of sheep were the Scottish Borders (1.15 million or 17 per cent of the total), Dumfries and Galloway (1.02 million or 15 per cent), the Highlands (866,000 or 13 per cent), Grampian (621,000 or nine per cent) and Tayside (612,000 or nine per cent).

Chart 5.14: Distribution of sheep by sub-region, June 2014



However, once you take into account the size of these sub-regions, Map 11 shows that, while one might associate the large areas of rough grazing in the Highlands with sheep farming, the highest concentration of sheep is to be found south of the central belt, and to a lesser extent on the east coast. The inset map within Map 11 also shows whether the sheep population in a parish is comprised mostly of lambs or older sheep. We can see that parishes with the higher proportions of lambs in June are located largely outwith upland areas, along the east coast and central belt and around coastal areas of the south west.

MAP 11: SHEEP PER HECTARE IN PARISH, 2014



Some parishes have been merged with neighbouring parishes to ensure minimum risk of identifying information about individual holdings. Which parishes have been merged is not shown.

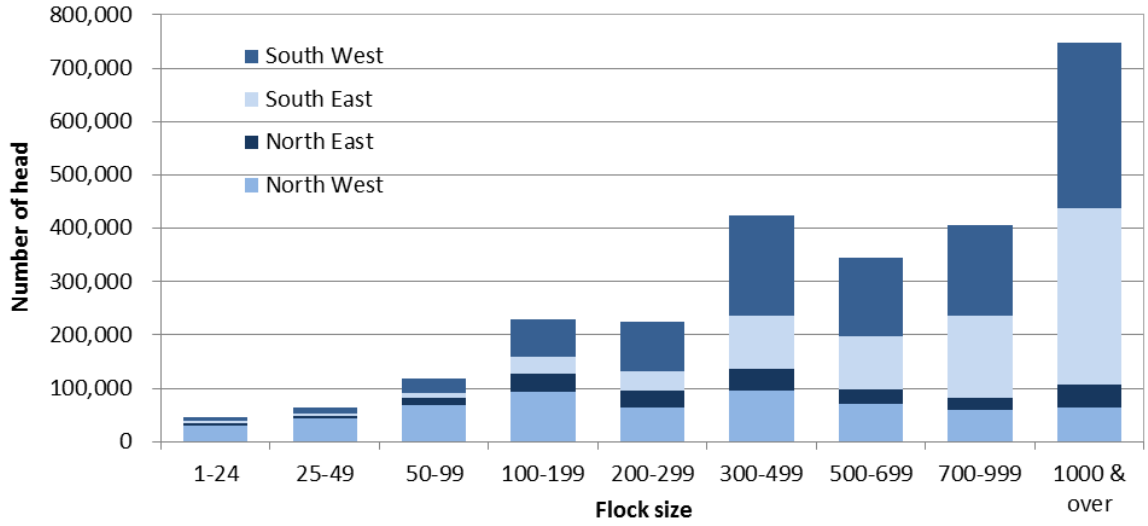
Source: Scottish Government RESAS, April 2015

5.3.2 Size of sheep flocks (Table C14)

There were 2.60 million breeding ewes in Scotland in June 2014, with the majority (1.50 million or 58 per cent) in flock sizes of 500 or more breeding ewes. These larger flock sizes were mostly located in the South East and South West.

Of the 12,714 holdings with breeding ewes, the majority (7,497 or 59 per cent) had flock sizes of less than 100 breeding ewes. However, these holdings only accounted for 234,500 (nine per cent) of breeding ewes in Scotland. Most of these holdings with smaller flock sizes were located in the North West.

Chart 5.15: Breeding sheep, by size group and region, June 2014



5.3.3 Income from sheep (Table A5)

Sheep account for about seven per cent of income from farming. Since 2004, the value of income from sheep, including store sales but excluding historical related subsidies, has increased by £67 million (35 per cent) to an estimated £215 million in 2014 (see chart 5.1). Between 2005 and 2008 values remained fairly steady, averaging around £140 million. Between 2008 and 2009 there was a 36 per cent increase in value followed by smaller fluctuations in the years after that. 2013 saw an 11 per cent fall, followed by a 15 per cent increase in 2014.

The volume of meat production over the past ten years has been mixed, with increases in one year being reversed the following year. Total production (including from older livestock), shown in chart 5.2, was eight per cent lower in 2014 than in 2004, at 58,000 tonnes, though slightly up on last year's level of production. Chart 5.16 similarly shows a decline in the production tonnage of finished lambs.

Chart 5.16: Finished lamb production and average price, 2004-2014

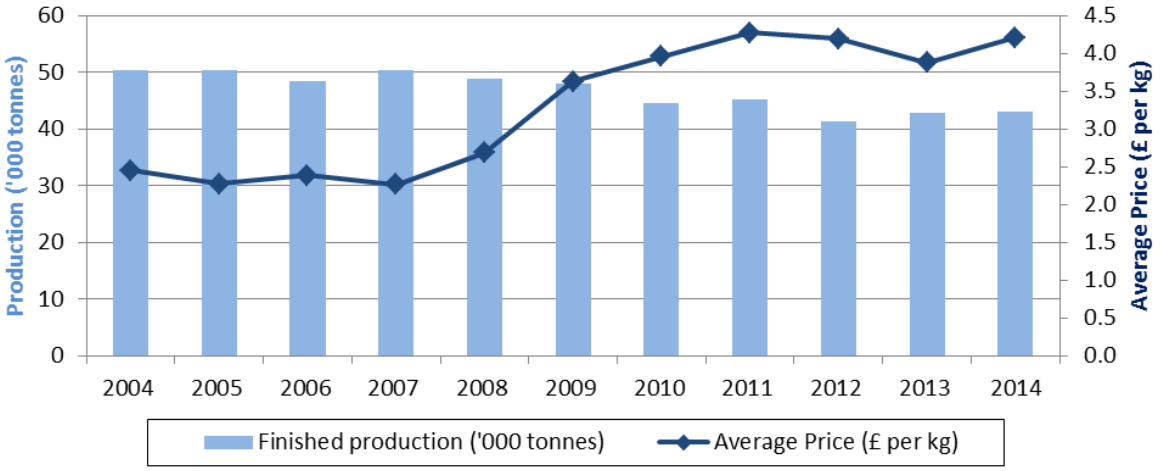
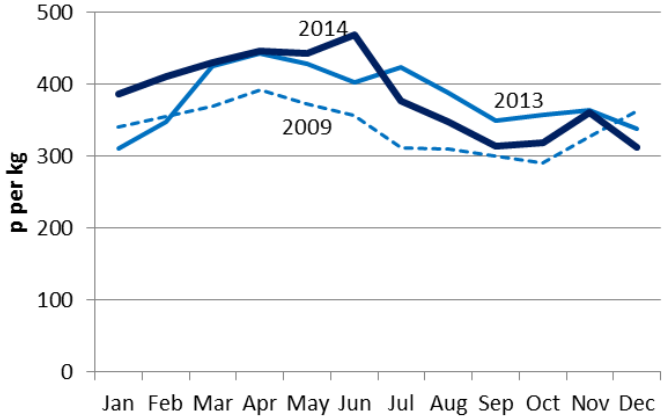


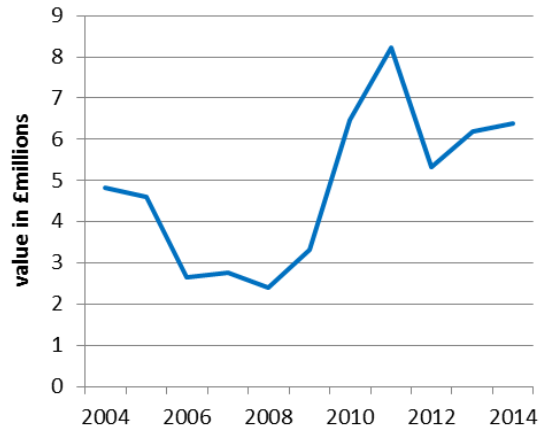
Chart 5.17: Monthly lamb prices in 2009, 2013 and 2014



Prices rose in the first part of 2014, from 387p per kg in January to 468p per kg in June, generally being higher than in 2013. However, when prices then fell they were lower than in 2013, ending the year at 313p per kg.

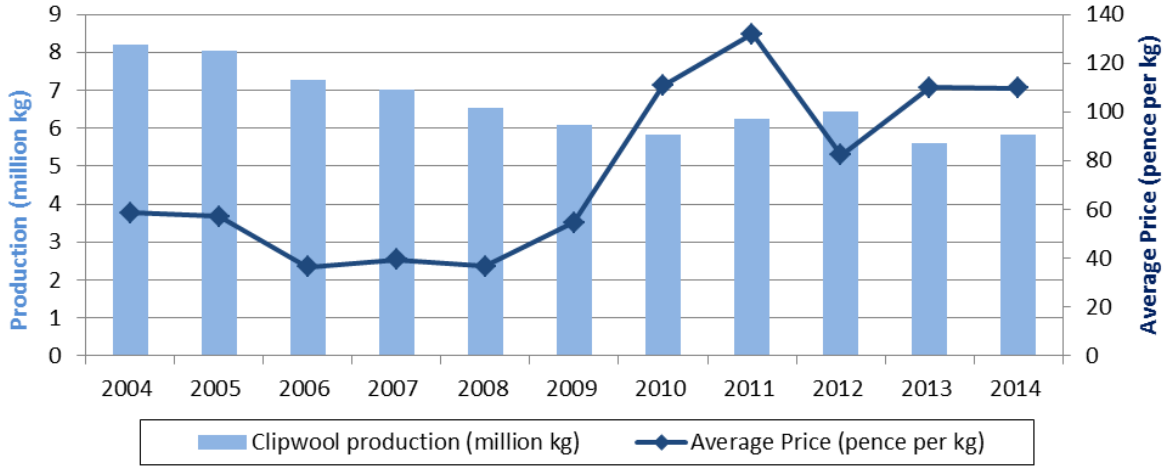
5.3.4 Income from wool (Table A6)

Chart 5.18: Income from wool, 2004-2014



Income from wool only accounted for about £6.4 million in 2014 – income from sheep meat was 33 times greater. The value of wool has however trebled since 2008, due to a considerable increase in price. There was a decrease in value in 2012, but most of this was recovered in 2013 and the value is now 87 per cent up on the 2004 value.

Chart 5.19: Wool production and average price, 2004 to 2014



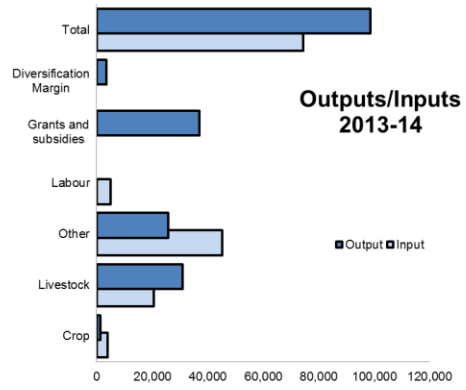
5.3.5 Specialist sheep (LFA) FBI (Table B1)

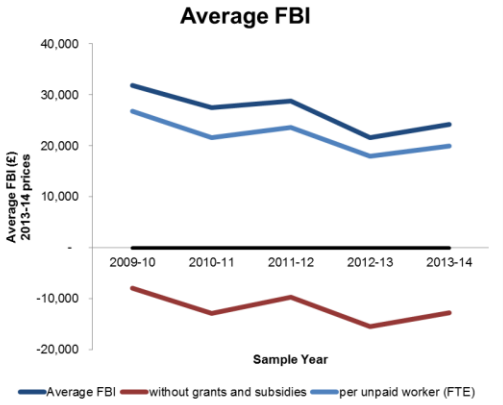
Accounting for inflation, between 2009-10 and 2013-14, the average FBI of specialist sheep (LFA) farms decreased by around 26 per cent. This decrease was due to a rise in input costs (especially labour and livestock) and a fall in livestock output value.

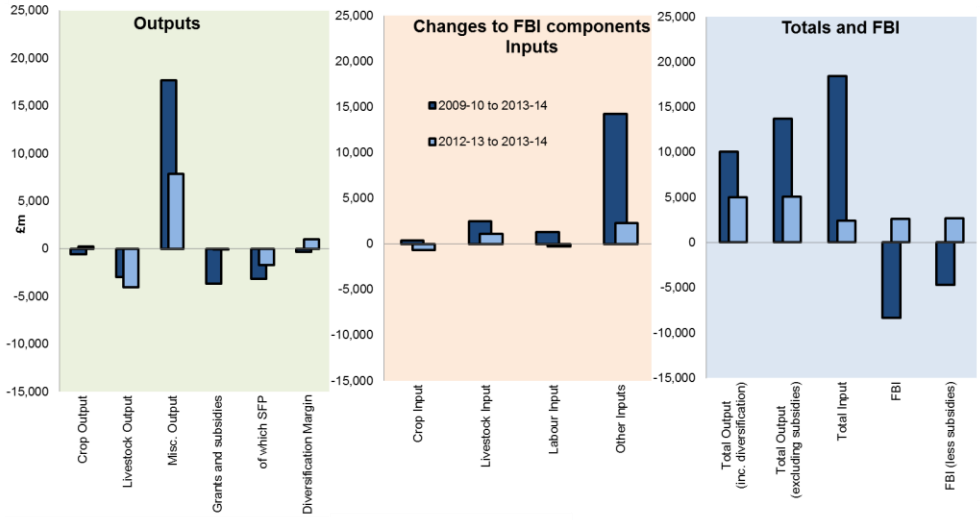
In the last year both input costs and output value for specialist sheep (LFA) farms have increased, resulting in an overall increase in profits for 2013-14. The average value of grants and subsidies remained largely unchanged to leave the FBI value of specialist sheep (LFA) farms at £24,000. The total average outputs, (including income from diversification and grants and subsidies) and inputs for specialist sheep (LFA) farms were £99,000 and £75,000 respectively. The largest portion of the input costs were due to other inputs such as machinery and land and buildings costs.

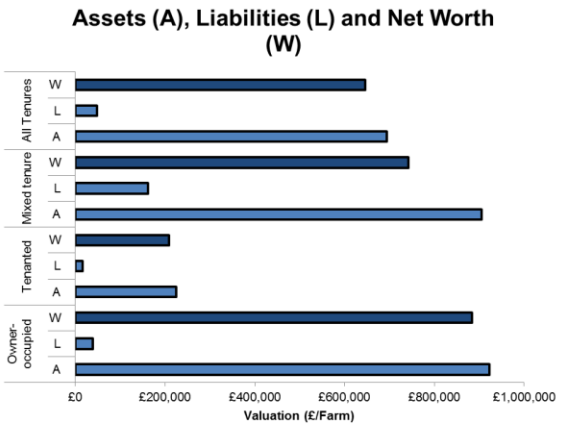
Over the last five years, FBI without subsidies has been below zero. An increase was observed in 2011-12 but income has since decreased. It ranges from -£8,000 in 2009-10 to -£16,000 in 2012-13. In 2013-14 the average FBI without subsidies of specialist sheep (LFA) was -£13,000.

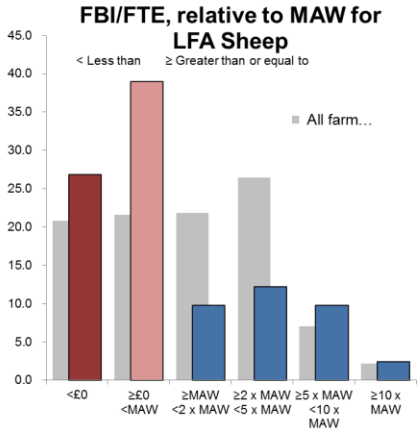
Specialist sheep (LFA) Farms

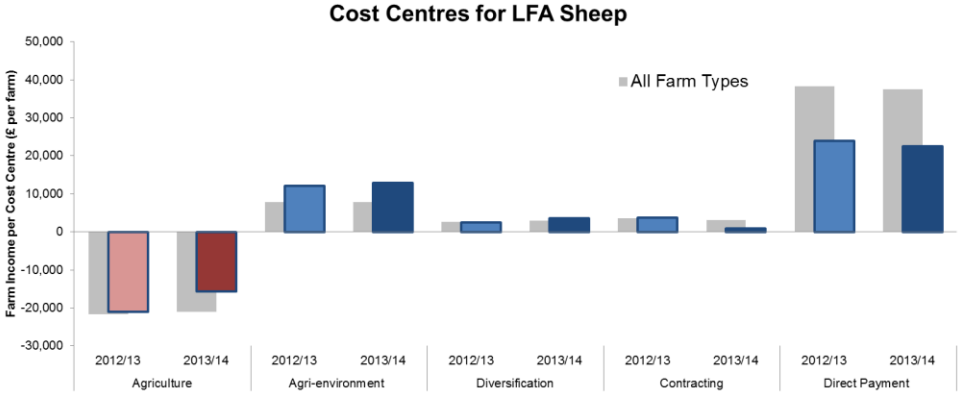












The average FBI/FTE for specialist sheep (LFA) farms of £20,000 is roughly equivalent to an hourly wage for unpaid labour of £10.53, one and a half times the minimum agricultural wage in Scotland. Approximately a quarter of farms (24 per cent) generated an FBI/FTE equivalent to at least twice the minimum agricultural wage per hour of unpaid labour. At the top end, ten per cent generated between five and ten times the minimum agricultural wage, that is, between £33.40 and £68.90 per hour of unpaid labour and two per cent generated more. In contrast, around two thirds of specialist sheep farms (66 per cent) generated incomes equivalent to less than the minimum agricultural wage.

Cost centre analysis for specialist sheep (LFA) farms show an overall increase, over the last year, improvements in income from agricultural and agri-environmental activities as well as diversification over the last year, with a decrease observed for contracting activities and subsidies.

The average net worth of specialist sheep (LFA) farms of all tenures was £645,000; from £209,000 for tenanted farms, to £742,000 for mixed tenure farms and £884,000 for owner occupied farms. The average debt ratio (liabilities: assets) was seven per cent overall but ranged between four per cent for owner-occupied and tenanted farms and 18 per cent for mixed tenure farms.

5.3.6 Sheep enterprises (Table B12)

Overall average gross margins for sheep enterprises ranged from £6 per head for extensive/hardhill production to £36 per head for crossbred ewe production.

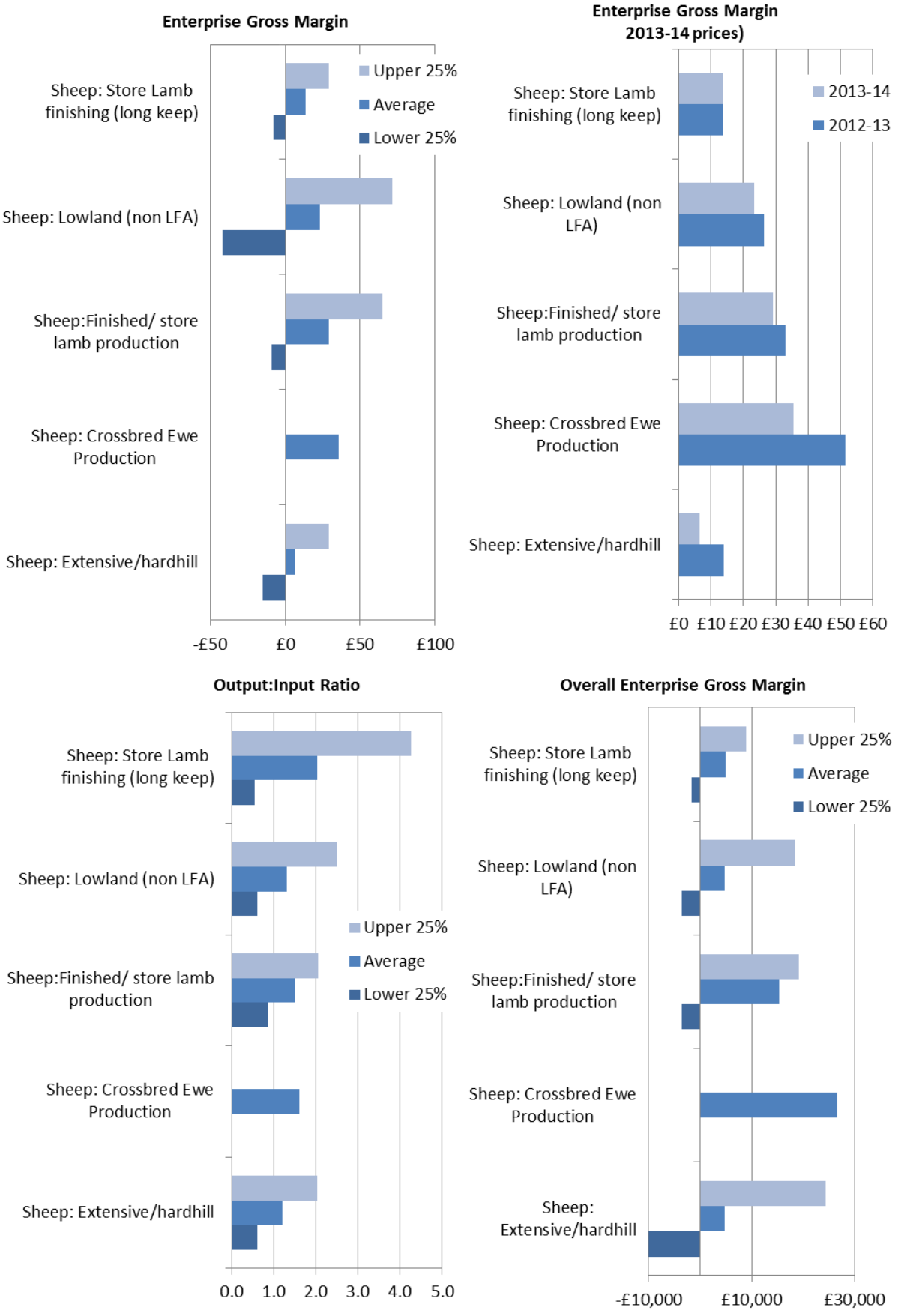
Where sample sizes were sufficient to allow comparisons between high and low performers, we can see that low performing sheep enterprises generated considerably lower margins. All low performing sheep enterprises made an average loss, ranging from -£8 per head for store lamb finishing enterprises (long keep) to −£42 per head for lowland sheep, whereas high performing enterprises achieved gross margins between £29 per head and £71 per head respectively.

High performing enterprises produced margins around two to three times that of the overall average for each enterprise type. The highest margins were achieved for high performing lowland (non-LFA) and store lamb production enterprises at £71 per head and £65 per head respectively.

For sheep enterprises, differences in gross margins between high and low performers are due to lower variable costs, value added to stocks, and higher sales prices per head which is expected to reflect generally higher quality outputs between the performance groups.

All sheep and lamb enterprises experienced a reduction in their overall average gross margin per head since 2012-13, down, on average, by around 27 per cent. This reduction in margins was caused largely by decreases in the value of sheep between opening and closing valuations, except for finished/store lamb production (where valuations increased but were offset by greater increases in variable costs than in sales prices) and for store Lamb finishing (long keep) where lower margins were caused by a decrease in sales price.

Sheep: Enterprise Gross Margin Measures



Taking account of the size of enterprises, crossbred ewe production (£27,000) and store lamb production (£15,000) achieved the highest average overall gross margins. Extensive/hardhill, lowland and long keep store lamb finishing enterprises (£5,000) achieved the lowest average overall gross margins. All sheep enterprises saw decreased overall margins compared to 2012-13, with extensive/hardhill declining the most (down 56 per cent).

In contrast to gross margin results, the group average output: input ratios (the return achieved per £1 spent) ranged from 1.2 for extensive/hardhill enterprises to 2.0 for long keep store lamb finishing (the only enterprise group to see an increase in the average output:input ratio compared to 2012-13.

More detailed results, including sample size information, are available from the agriculture statistics web page, Enterprise Performance Analysis[13].

5.3.7 Other cattle & sheep (LFA) FBI (Table B1)

The other cattle & sheep (LFA) category includes all cattle & sheep (LFA) holdings other than those in specialist cattle (LFA) and specialist sheep (LFA).

Accounting for inflation, between 2009-10 and 2013-14 the average FBI of other cattle & sheep (LFA) farms decreased by around 43 per cent. This decrease was due to a rise in input costs, especially labour and livestock and a fall in the value of subsidies and reduced margins from diversification.

In the last year input costs for other cattle & sheep (LFA) farms have slightly increased, while the output value had a greater increase. This combined with an average increase in the value of grants and subsidies (up £2,000) produced a FBI value of other cattle & sheep (LFA) farms at £26,000. The total average outputs, (including income from diversification and grants and subsidies) and inputs for other cattle & sheep (LFA) farms were £172,000 and £146,000 respectively. The largest portion of the input costs was due to feed and other inputs such as machinery, land and buildings.

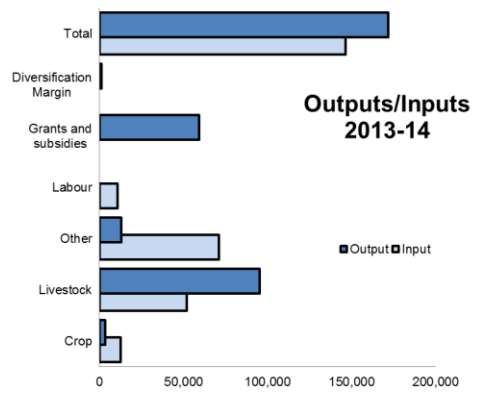
Over the last five years, FBI without subsidies has been below zero and declining. It ranges from -£19,000 in 2009-10 to -£36,000 in 2012-13. In 2013-14 the average FBI without subsidies of other cattle & sheep (LFA) was -£34,000.

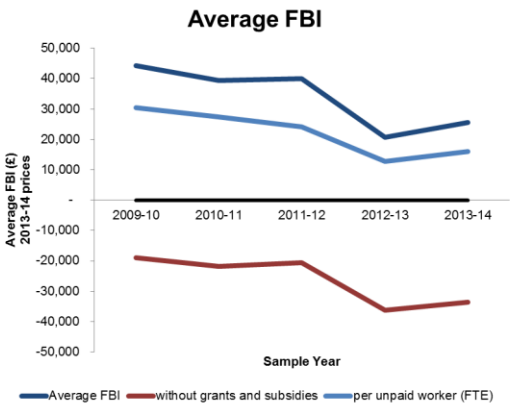
The average FBI/FTE for other cattle & sheep (LFA) of £16,000 is roughly equivalent to an hourly wage for unpaid labour of £8.38, almost equivalent to one and a half times the minimum agricultural wage in Scotland. Approximately a third of farms (32 per cent) generated an FBI/FTE equivalent to at least twice the minimum agricultural wage per hour of unpaid labour. At the top end, two per cent generated more than five times the minimum agricultural wage, that is, greater than £33.40 per hour of unpaid labour. In contrast, nearly half of other cattle & sheep (LFA) farms (47 per cent) generated incomes equivalent to less than the minimum agricultural wage.

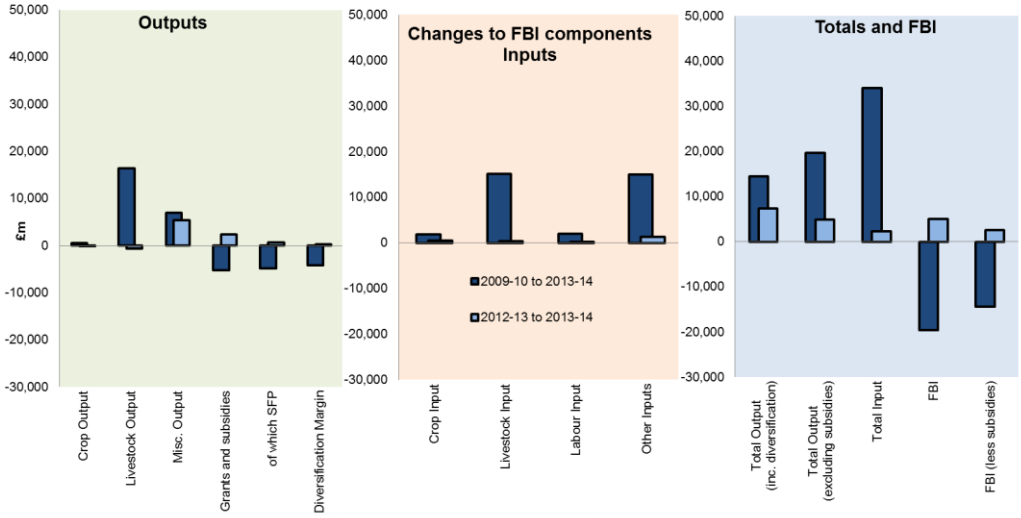
Trends in cost centres for other cattle & sheep (LFA) farms show an overall increase in income as part of diversification and contracting compared to 2012-13, with

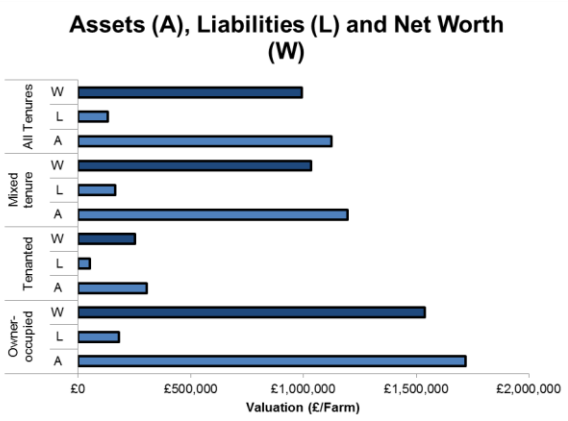
[13] www.gov.scot/Topics/Statistics/Browse/Agriculture-Fisheries/Publications/FASdata

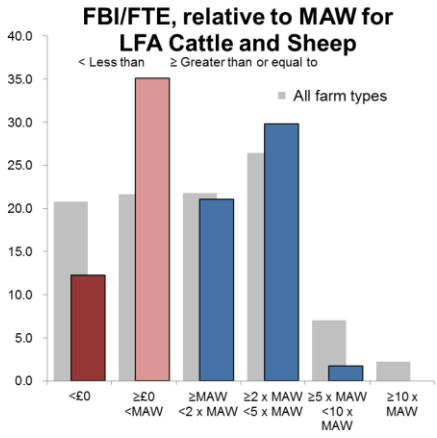
Other Cattle & Sheep Farms (LFA)

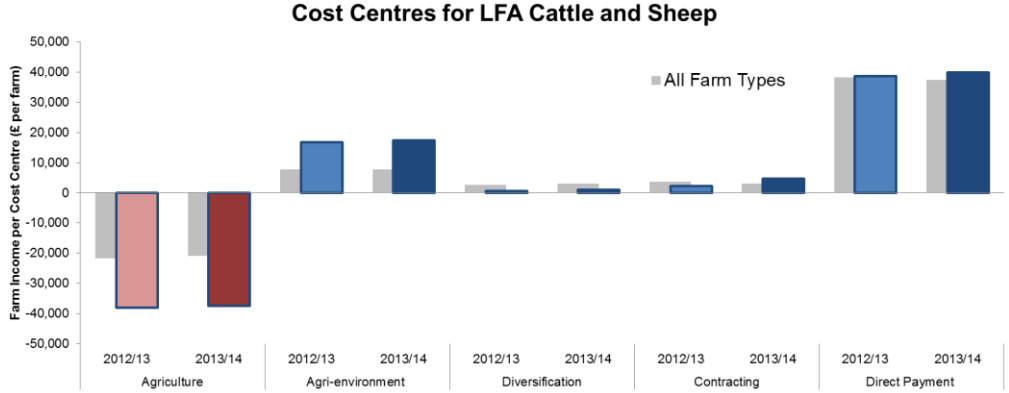












income from agricultural and environmental activities and subsidies remaining largely unchanged.

The average net worth of other cattle & sheep (LFA) farms of all tenures was £992,000; from £252,000 for tenanted farms, to £1,033,000 for mixed tenure farms, and to £1,538,000 for owner occupied farms. The average debt ratio (liabilities: assets) was 12 per cent for all tenures of other cattle & sheep (LFA) farms but ranged between 11 per cent for owner-occupied and 18 per cent for tenanted farms.

5.3.8 Lowland cattle & sheep FBI (Table B1)

Accounting for inflation, between 2009-10 and 2013-14 the average FBI of lowland cattle & sheep farms decreased by around 41 per cent. This was due to an increase in the input costs for livestock and machinery, land and buildings.

In the last year both input costs and output values for lowland cattle & sheep farms have increased, resulting in an overall increase in FBI value for 2013-14. The average value of grants and subsidies has remained unchanged to leave the FBI value of lowland cattle & sheep farms at £24,000. The total average outputs, (including income from diversification and grants and subsidies) and inputs for lowland cattle & sheep farms were £181,000 and £157,000 respectively. The largest portion of the input costs was due to feed and other inputs such as machinery, land and buildings.

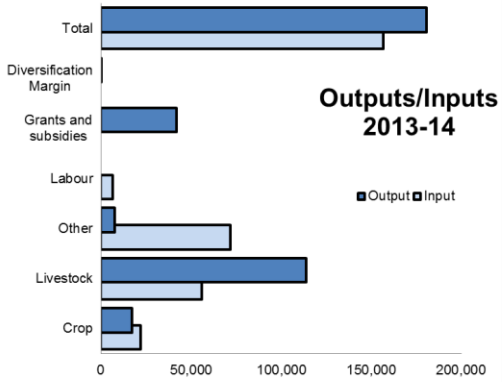
Over the last five years, FBI without subsidies has been below zero. It has ranged from -£23,000 in 2012-13 to -£6,000 in 2010-11. In 2013-14 the average FBI without subsidies of lowland cattle & sheep farms was -£18,000.

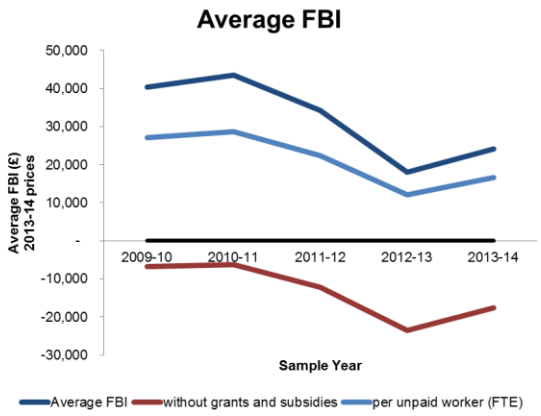
The average FBI/FTE for lowland cattle & sheep farms of £17,000 is roughly equivalent to an hourly wage for unpaid labour of £8.78, below the minimum agricultural wage in Scotland. Approximately a third of farms (30 per cent) generated an FBI/FTE equivalent to at least twice the minimum agricultural wage per hour of unpaid labour. At the top end, three per cent generated more than ten times the minimum agricultural wage, that is, greater than £68.90 per hour of unpaid labour. In contrast, nearly half of lowland cattle & sheep farms (48 per cent) generated incomes equivalent to less than the minimum agricultural wage.

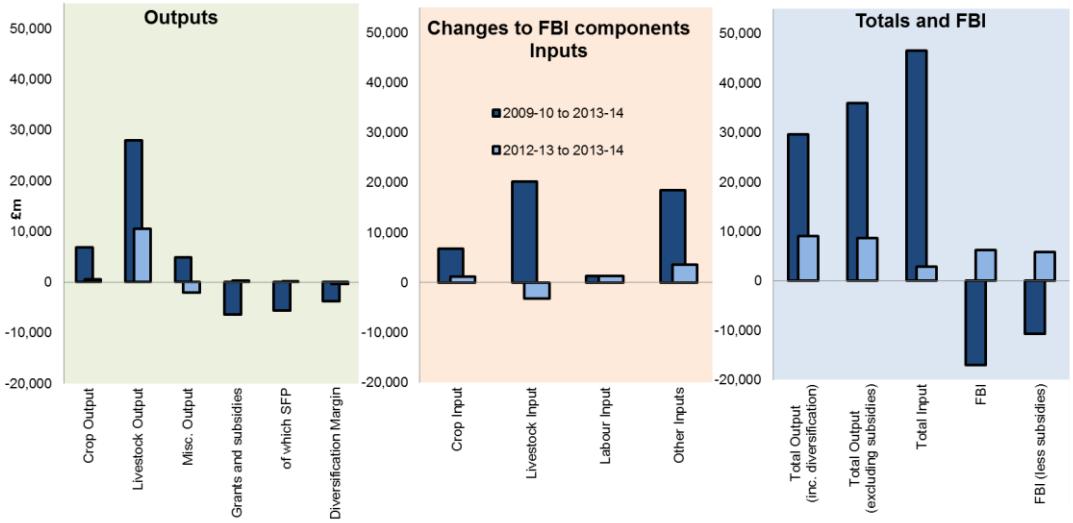
Trends in cost centres for lowland cattle & sheep farms show an overall increase in income as part of agricultural compared to 2012-13, with diversification, contacting, subsidies and environmental activities remaining largely unchanged.

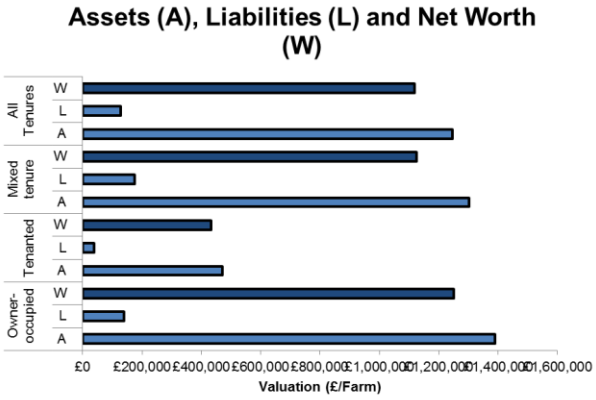
The average net worth of lowland cattle & sheep farms of all tenures was £1,119,000, from £432,000 for tenanted farms, to £1,125,000 for mixed tenure farms, and to £1,251,000 for owner occupied farms. The average debt ratio (liabilities: assets) was ten per cent for all tenures of lowland cattle and sheep farms but ranged between eight per cent for owner-occupied and 14 per cent for mixed farms.

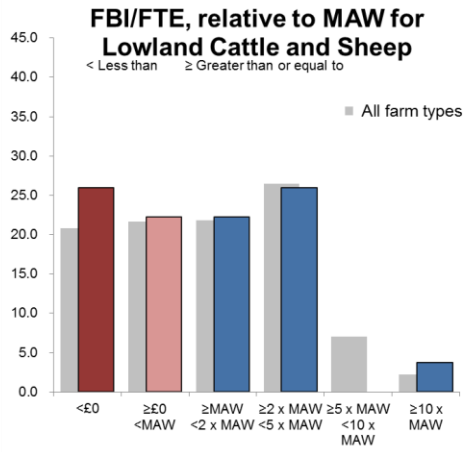
Lowland Cattle & Sheep Farms

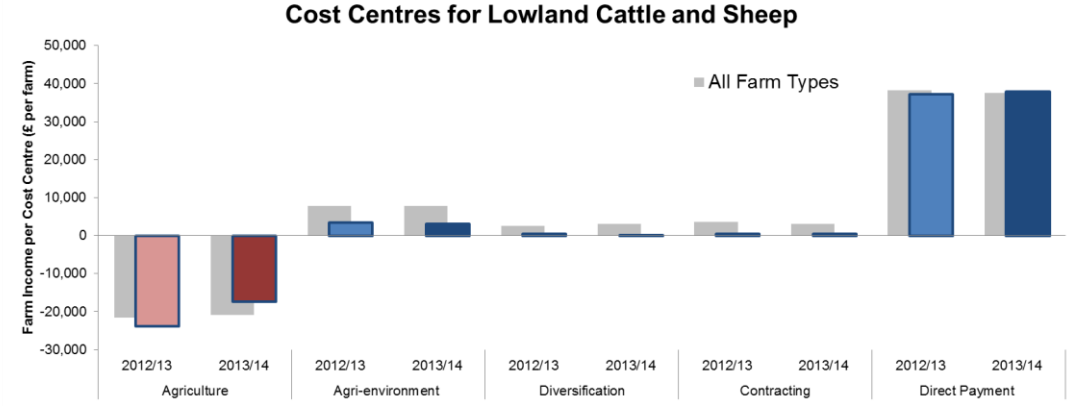








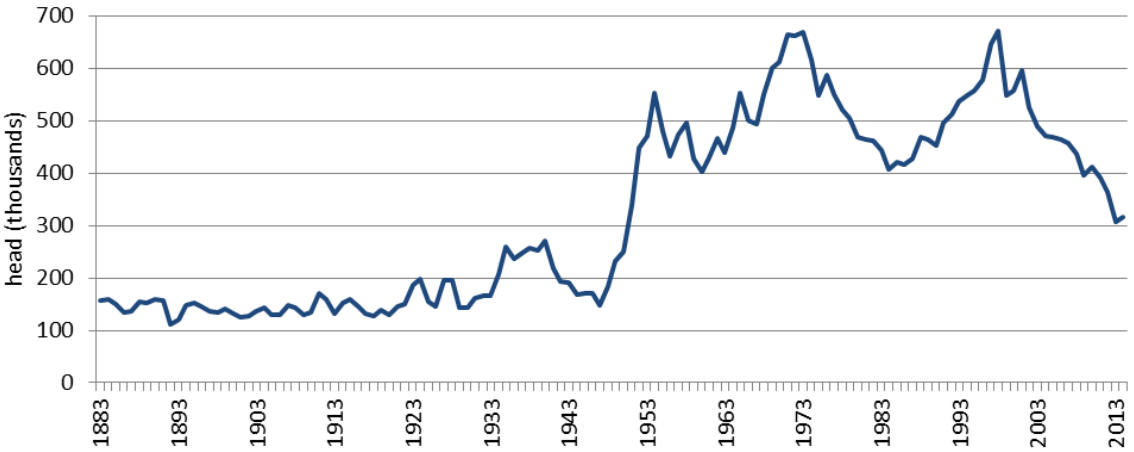




5.4 Pigs

There were 316,000 pigs in Scotland in June 2014. The number increased sharply in the 1950s, peaking in the early 70s and late 90s, with numbers in general decline since then.

Chart 5.20: Number of pigs in Scotland 1883-2014



5.4.1 Distribution of pigs (Table C10(i), C10(ii))

Chart 5.23 shows that the majority of pigs were located in Grampian (181,400 pigs or 57 per cent). Tayside, Lothian, Highland and Scottish Borders each accounted for between six per cent and 12 per cent of the total number of pigs in Scotland.

5.4.2 Pig herd size (Tables C15, C16)

The pig sector is highly concentrated. In June 2014 nine per cent of pig holdings accounted for 86 per cent of the total number of female breeding pigs (46 holdings each having more than 250 female breeding pigs, with 26,000 breeding pigs, out of a total of 30,200). Conversely, 74 per cent of holdings accounted for just over two per cent of female breeding pigs (390 holdings with fewer than five female breeding pigs each, and 725 between them).

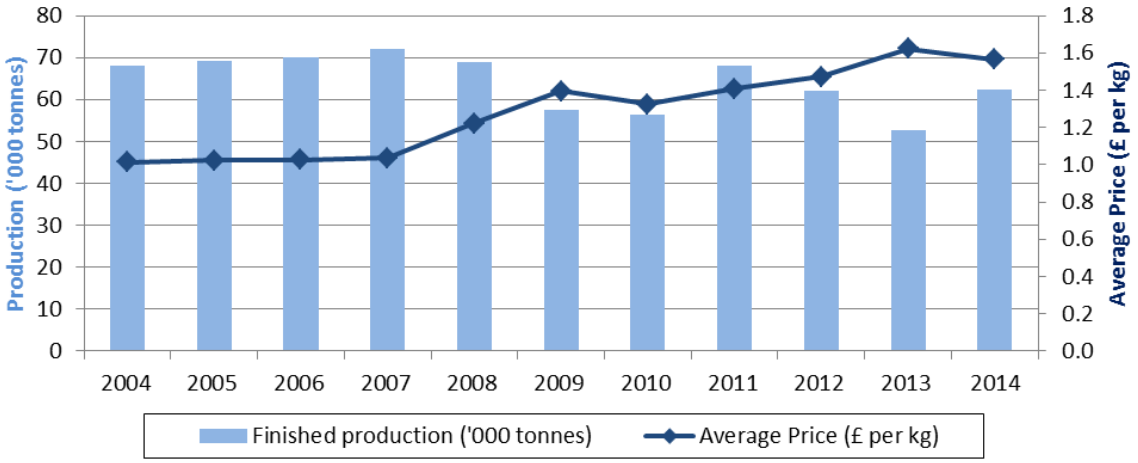
This structure is similar for fattening pigs, with 15 per cent of holdings accounting for 98 per cent of fattening pigs (115 holdings with herds of 100 and over accounting for 186,900 of the 190,900 fattening pigs in Scotland). Likewise there were 73 per cent of holdings accounting for less than one per cent of the total number of fattening pigs (576 holdings with herds of fewer than ten). In the case of both breeding and fattening pigs, this concentration of larger herds is greatest in the North East, where the majority of pigs in Scotland are located.

5.4.3 Income from pigs (Table A6)

Pigs accounted for about three per cent of output from farming. The value of income from pigs increased by £28 million (42 per cent) between 2004 and 2014; the 2014 value was £94 million (see chart 5.1). Income has seen several rises over the period, particularly in 2011 and 2014. Between 2011 and 2013 values fell by 12 per cent, but rose again in 2014 by £15 million (19 per cent), due to an increase in numbers.

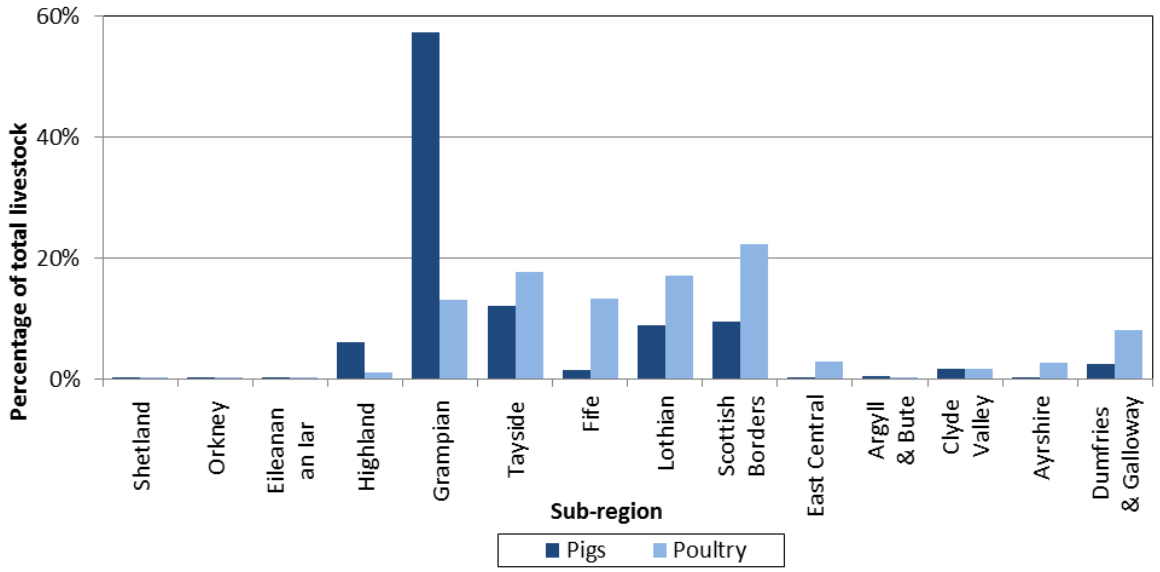
Between 2004 and 2014 total pig-meat production fell by 5,600 tonnes (eight per cent), (see chart 5.2). Including cull of older animals, production in 2014 was at 62,000 tonnes. A large increase in production (as well as price) in 2011 to 68,000 tonnes had the effect of making the decreases in following years appear larger than a comparison with the trend would suggest. Chart 5.21 shows data for finished pig production, excluding older livestock.

Chart 5.21: Finished pig production and average price, 2004-2014



Over the past ten years there have been increases in the price of finished pigs, up from an average of £1.01 per kg in 2004 to £1.57 per kg in 2014, a 54 per cent rise.

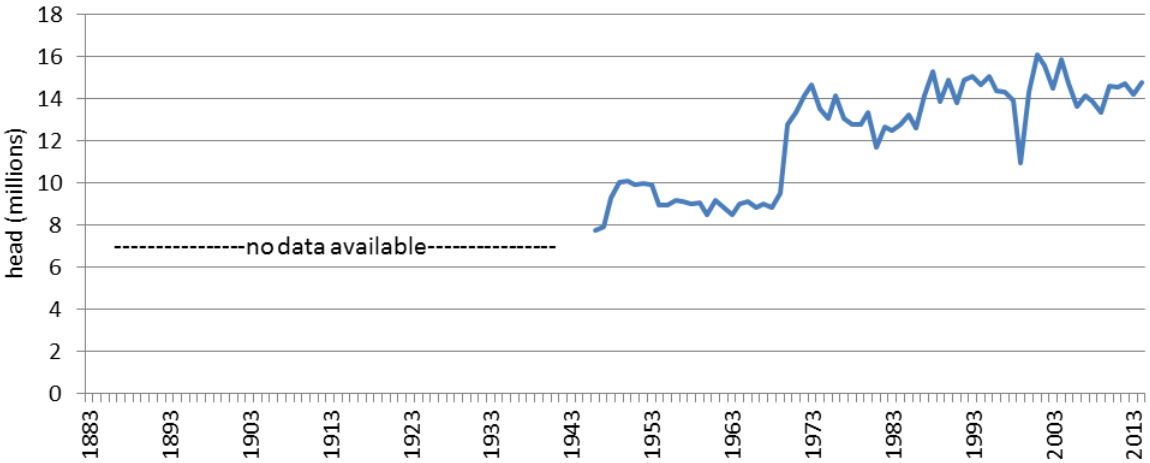
Chart 5.22: Distribution of pigs and poultry by sub-region, June 2014



5.5 Poultry

There were 14.74 million poultry on agricultural holdings in Scotland in June 2014. Numbers, which are only available since 1946, increased in the 1970s, and have fluctuated since then, generally between 12 million and 15 million.

Chart 5.23: Number of poultry in Scotland 1946-2014



5.5.1 Distribution of poultry (Table C10(i), C10(ii))

Chart 5.23 shows that 83 per cent of poultry were located in the East of Scotland, in Tayside, Grampian, Scottish Borders, Fife and Lothians, with each sub-region accounting for between 13 per cent and 22 per cent of the Scottish total.

5.5.2 Poultry flock size (Tables C17, C18)

The poultry sector is highly concentrated. In June 2014, two per cent of poultry holdings accounted for 98 per cent of fowls laying eggs for eating (134 holdings with more than 1,000 fowls for laying eggs for eating, with 5.61 million birds). Conversely, 79 per cent of holdings with fowls for laying eggs accounted for just 0.7 per cent of birds (4,836 holdings with fewer than 20 laying fowls, with 38,100 between them).

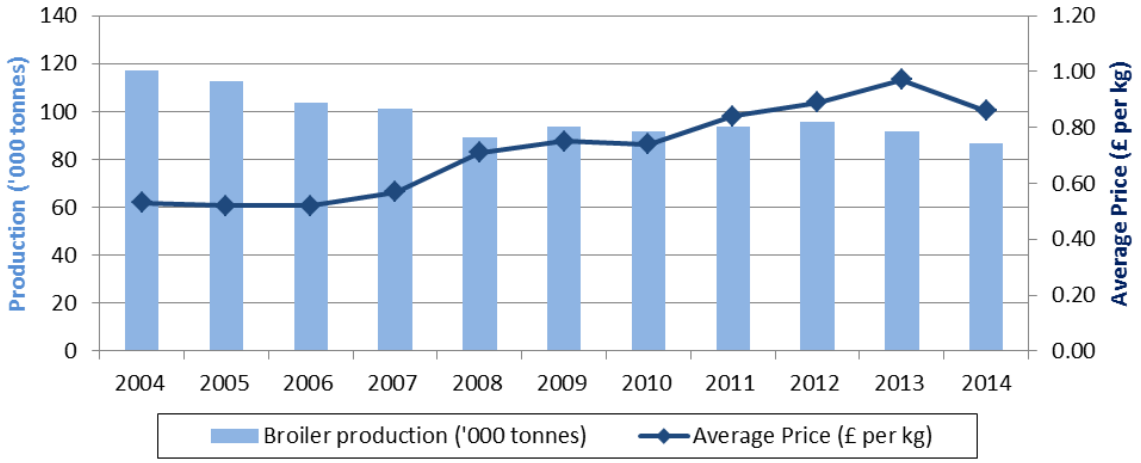
There was also a similar pattern for breeding fowls, with three per cent of holdings accounting for 89 per cent of the 975,000 breeding fowls in Scotland (32 holdings with 870,000 birds).

5.5.3 Income from poultry (Table A6)

Poultry accounted for about three per cent of output from farming. The value of £100 million has increased by 16 per cent since 2004 (see chart 5.1). Income increased by £32 million (37 per cent) between 2004 and 2013, with large increases occurring in 2009 (£14 million), 2011 (£12 million) and 2012 (£12 million), due to a combination of higher prices and an increased volume of meat production. There was a £18 million decrease in 2014.

Poultry production (chart 5.2) decreased steadily between 2004 and 2008, from 124,000 tonnes in 2004 to 89,000 tonnes in 2008 (a 24 per cent fall). This was followed by marginal increases in most years until 2012. Falls in 2013 and 2014 have seen the overall poultry production levels decrease to its lowest level over the decade, 26 per cent down on 2004. Chart 5.24 shows a similar pattern for just broilers.

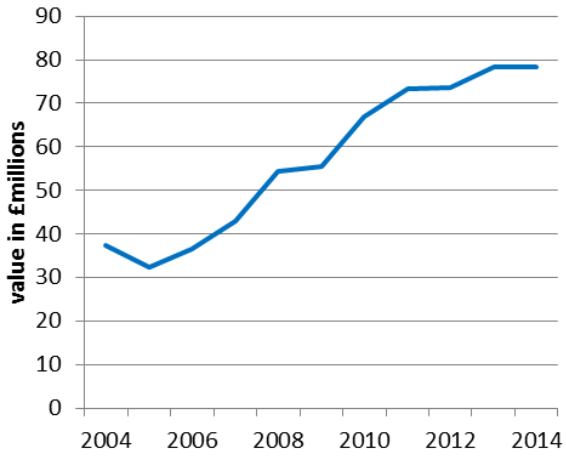
Chart 5.24: Broiler production and average price, 2004-2014



Prices have increased by 62 per cent between 2004 and 2014, up from an average of £0.53 per kg in 2004 to £0.86 per kg in 2014. There have been price increases in almost every year since 2004; the rise between 2012 and 2013 was around nine per cent, with a decrease of £0.11 per kg (11 per cent) in the last year.

5.5.4 Income from eggs (Tables A6)

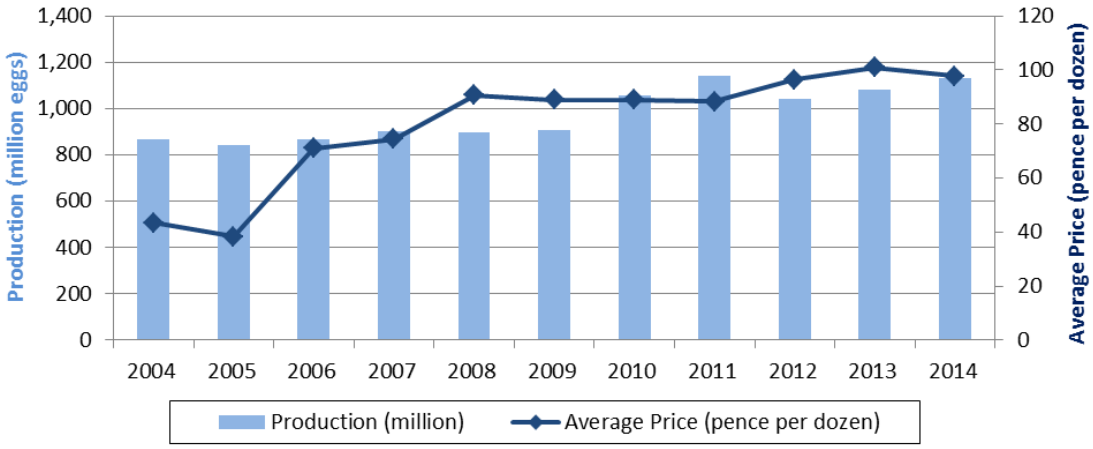
Chart 5.25: Income from eggs, 2003-2013



Income from eggs was estimated at £78 million in 2014, about 80 per cent of the value from poultry meat. The value has more than doubled since 2004, having risen steadily since 2005.

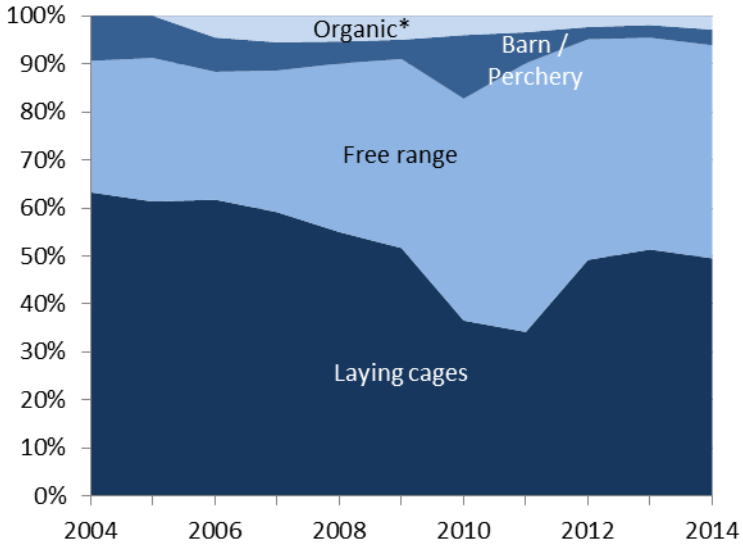
Egg production increased steadily between 2004 and 2009, from 866 million eggs to 907 million eggs, an increase of 41 million eggs (five per cent), with a larger increase between 2009 and 2014 of 224 million eggs (25 per cent), showing an overall increase between 2004 and 2014 of 265 million eggs (31 per cent).

Chart 5.26: Eggs for food - production and average price 2004 to 2014



Since 2003, prices have risen from 41p per dozen to 66p per dozen (63 per cent) for eggs produced in laying cages and from 74p per dozen to 97p per dozen (32 per cent) for free range eggs.

Chart 5.27: Egg production method, 2004-2014



*data on organic not collected prior to 2006

Chart 5.27 shows the change in the method used to produce these eggs. In 2004 nearly two-thirds (63 per cent) of all eggs were produced in laying cages, whereas in 2014 there was a more equal split, with laying cages accounting for 50 per cent and free range for 44 per cent. In 2011 the proportion in laying cages fell to 34 per cent.

5.6 Other livestock

Other livestock collected in the census consisted mainly of horses, deer, goats and camelids. The number of horses has increased by 35 per cent over the last ten years to 37,000, though with very few used for agricultural purposes. The number of farmed deer fell slightly in the first half of the decade, though has risen for each of the last three years to around 7,000 in June 2014. Data on camelids (alpacas, llamas, etc.) have been collected since 2010, with around 1,800 in 2014.

Income from other livestock and other livestock products, which also includes income from stud farms, game and honey, is estimated in TIFF at £31 million, though there is little data on the actual value of these produce.

5.7 Mixed farms FBI (Table B1)

Accounting for inflation, between 2009-10 and 2013-14 the average FBI of mixed farms decreased by around 24 per cent. This was due to an increase in the input costs for crop, livestock and machinery, land and buildings.

In the last year both input costs and output values for mixed farms have decreased, resulting in an overall decline in FBI value for 2013-14. The average value of grants and subsidies decreased (down £2,000) to leave the FBI value of mixed farms at £30,000. The total average outputs, (including income from diversification and grants and subsidies) and inputs for mixed farms were £275,000 and £245,000 respectively. The largest portion of the input costs was due to other inputs such as machinery, land and buildings.

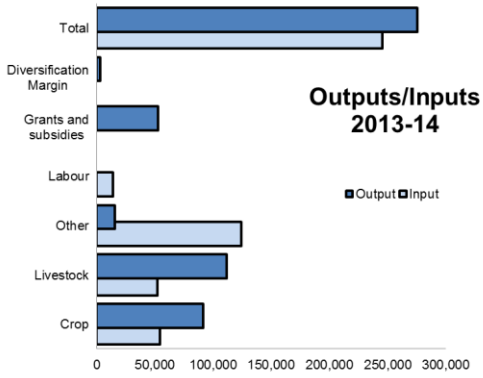
Over the last five years, FBI without subsidies has been below zero, with the exception of 2010-11 when FBI without subsidies was £96. In other years it ranges from -£23,000 in 2013-14 to -£7,000 in 2011-12.

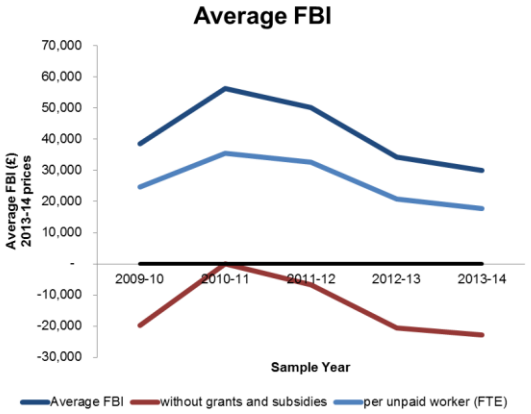
The average FBI/FTE for mixed farms of £18,000 is equivalent to an hourly wage for unpaid labour of £9.31, around one and a half times the minimum agricultural wage in Scotland. Approximately a third of farms (30 per cent) generated an FBI/FTE equivalent to at least twice the minimum agricultural wage per hour of unpaid labour. At the top end, four per cent generated more than five times the minimum agricultural wage, that is, greater than £33.40 per hour of unpaid labour. In contrast, 39 per cent of mixed farms generated incomes equivalent to less than the minimum agricultural wage.

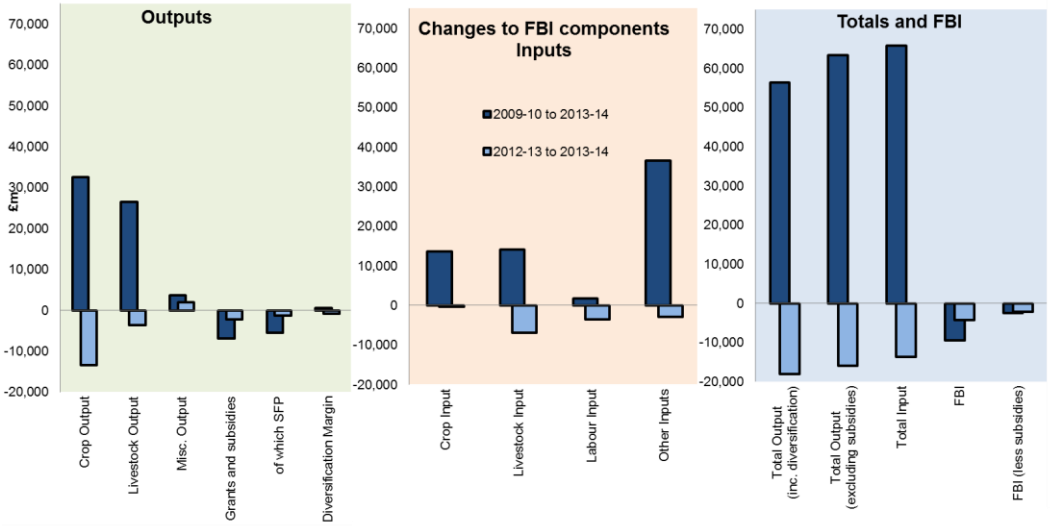
Cost centre analysis for mixed farms show an overall decrease in income as part of agricultural and environmental activities, diversification and subsidies compared to 2012-13, an increase was observed for contracting activities in 2013-14.

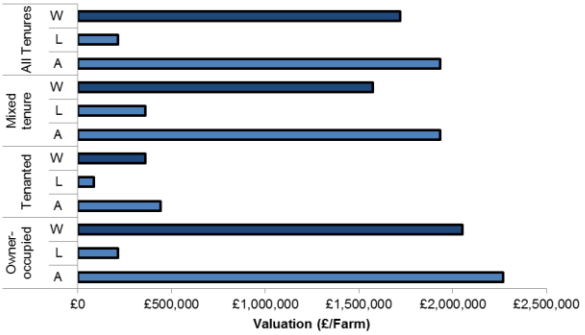
The average net worth of mixed farms of all tenures was £1,719,000; from £359,000 for tenanted farms, to £1,573,000 for mixed tenure farms and £2,053,000 for owner occupied farms. The average debt ratio (liabilities: assets) was 11 per cent for all tenures of mixed farms but ranged between nine per cent for owner-occupied farms and 19 per cent for tenanted farms.

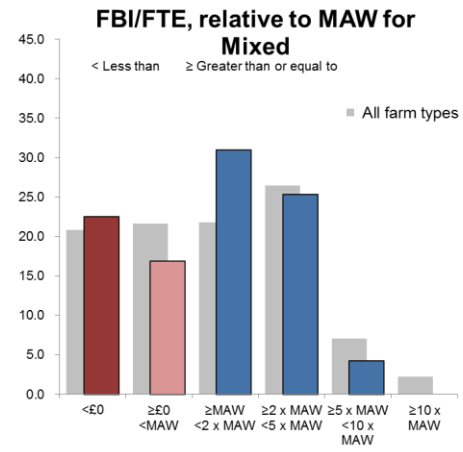
Mixed Farms

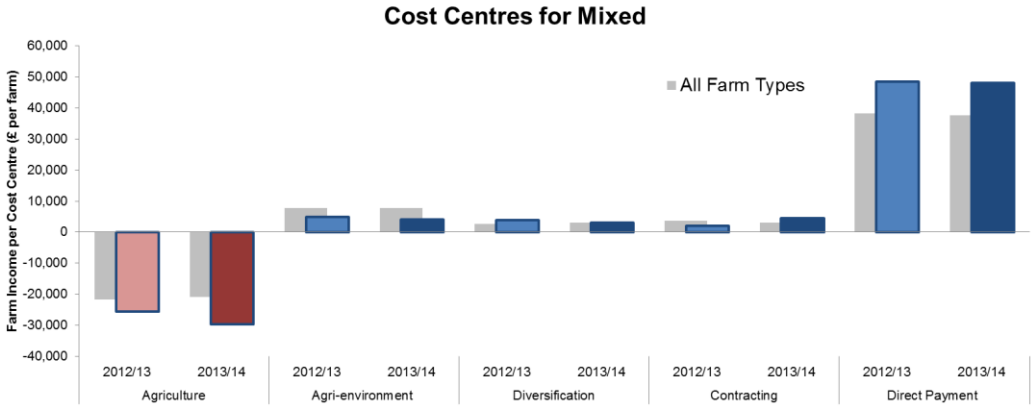

Outputs/Inputs 2013-14
Total
Diversification Margin
Grants and subsidies
Labour
Other
Livestock
Crop
Output
Input
0
50,000
100,000
150,000
200,000
250,000
300,000


Average FBI
Average FBI (£) 2013-14 prices
70,000
60,000
50,000
40,000
30,000
20,000
10,000
-
-10,000
-20,000
-30,000
2009-10
2010-11
2011-12
2012-13
2013-14
Sample Year
Average FBI
without grants and subsidies
per unpaid worker (FTE)


Outputs
£m
Crop Output
Livestock Output
Misc. Output
Grants and subsidies
of which SFP
Diversification Margin
Changes to FBI components
Inputs
2009-10 to 2013-14
2012-13 to 2013-14
Crop Input
Livestock Input
Labour Input
Other Inputs
Totals and FBI
Total Output (inc. diversification)
Total Output (excluding subsidies)
Total Input
FBI
FBI (less subsidies)


Assets (A), Liabilities (L) and Net Worth (W)
All Tenures
Mixed tenure
Tenanted
Owner-occupied
W
L
A
£0
£500,000
£1,000,000
£1,500,000
£2,000,000
£2,500,000
Valuation (£/Farm)


FBI/FTE, relative to MAW for Mixed
< Less than
≥ Greater than or equal to
All farm types
45.0
40.0
35.0
30.0
25.0
20.0
15.0
10.0
5.0
0.0
<£0
≥£0 <MAW
≥MAW <2 x MAW
≥2 x MAW <5 x MAW
≥5 x MAW <10 x MAW
≥10 x MAW


Cost Centres for Mixed
Farm Income per Cost Centre (£ per farm)
All Farm Types
60,000
50,000
40,000
30,000
20,000
10,000
0
-10,000
-20,000
-30,000
-40,000
2012/13
2013/14
Agriculture
Agri-environment
Diversification
Contracting
Direct Payment

6. Payments and Subsidies (Tables A1, A12)

In 2014, total payments and subsidies included in the TIFF figure were £511 million. Table A12(i) provides a breakdown of this total, with Single Farm Payments at £382 million accounting for the majority (75 per cent), followed by Less-Favoured Area Support Scheme (LFASS) payments at £66 million (13 per cent). The next largest amounts were for payments under Rural Priorities (£35 million or seven per cent) and the Scottish Beef Scheme (£21 million or four per cent).

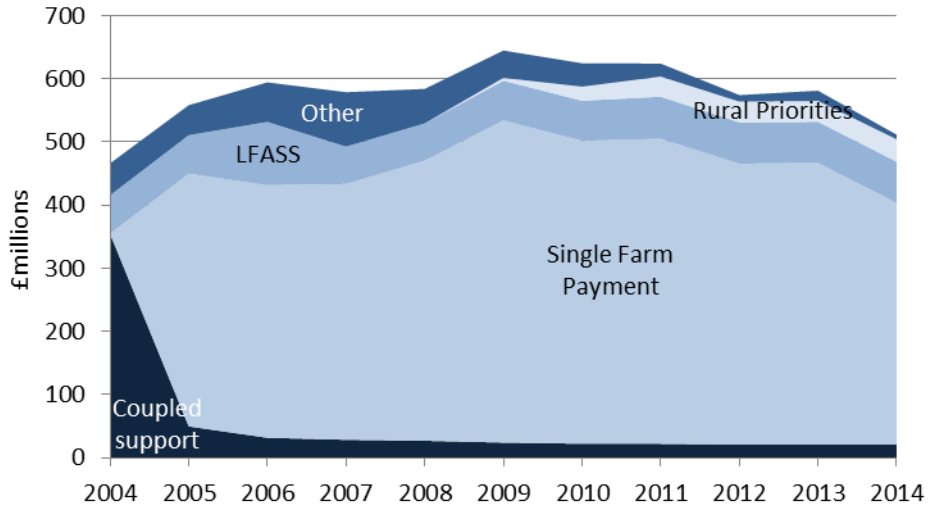
2014 saw the completion of details of the new Common Agricultural Policy (CAP) regime for Scotland, leading to the implementation of the new regulations from the start of 2015.

Not all payments and subsidies made to farmers are included in the TIFF total. Table A12(ii) shows a further £23 million (provisional figure) paid to farmers in 2014, mostly under Rural Priorities (£14 million) and the FEOGA Processing and Marketing Scheme (£6 million). These payments were primarily for capital improvements and for non-agricultural activities, which fall outwith the scope of the TIFF definition.

It should be noted that the totals under various schemes shown in Tables A12(i) and A12(ii) only represent payments made to the agriculture sector, so exclude any payments to other sectors such as forestry. They also exclude broader non-agricultural payments under the Scottish Rural Development Programme.

Chart 6.1 illustrates trends in payments and subsidies, included within the TIFF total, since 2004. In 2005, de-coupling of payments and subsidies took place under reforms of the CAP. Payments previously tied directly to crop and livestock production were mostly consolidated into the Single Farm Payment. Since 2005, coupled cattle subsidies have included payments under the Scottish Beef Calf Scheme, ranging between £18 million and £24 million, which was replaced in 2013 with the Scottish Beef Scheme. There were also payments under the 'Over 30 Month Scheme' (up to 2006) and 'Older Cattle Disposal Scheme' (up to 2008), related to the disposal of older cattle which were prevented from entering the food chain, in order to minimise the risk to public health related to BSE.

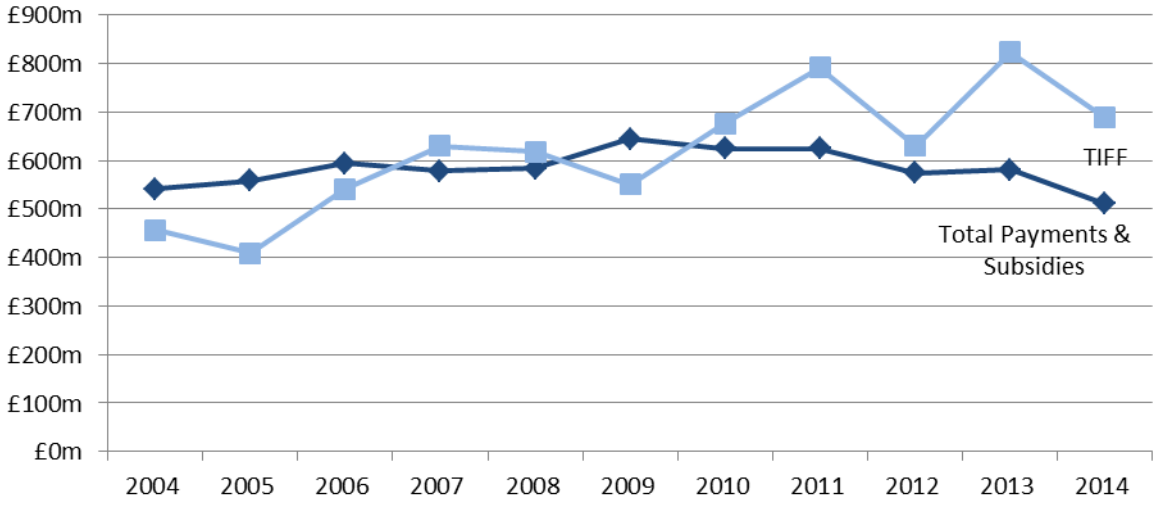
Chart 6.1: Grants and subsidies 2004-2014



Total payments and subsidies included in TIFF have decreased by £30 million (six per cent) between 2004 and 2014. The sterling value of Single Farm Payments decreased to £382 million in 2014, due to a less favourable exchange rate and a reduction in the original amount due to changes in the EU budget.

Chart 6.2 also shows that since 2010, the total value of TIFF has been higher than the value of total payments and subsidies. Years where TIFF was lower suggest that without these payments and subsidies, the net income to farmers would have been negative. (See section 3.3 for a contradictory finding from the Farm Accounts Survey.)

Chart 6.2: Payments and subsidies compared with TIFF, 2004 to 2014



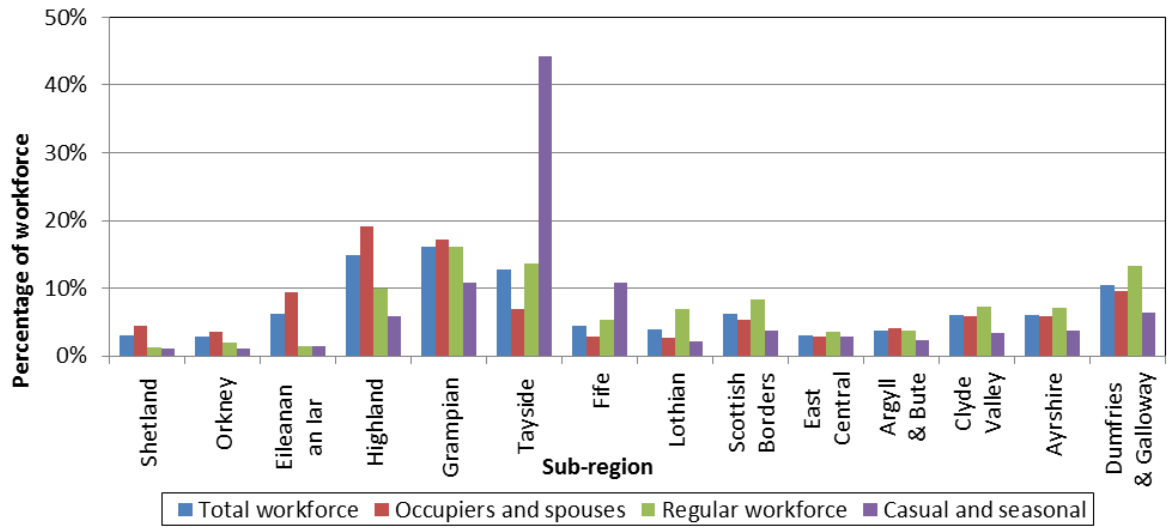
7. Labour and Machinery

7.1 Overview of labour (Tables C19, C21(i), C21(ii))

There were a total of 66,300 people working on agricultural holdings at 1st June 2014. This was made up of 26,300 working occupiers (comprising 40 per cent of the total workforce), 12,700 working spouses (19 per cent), 13,200 full time regular staff (20 per cent), 7,400 part time regular staff (11 per cent) and 6,700 casual and seasonal staff (ten per cent).

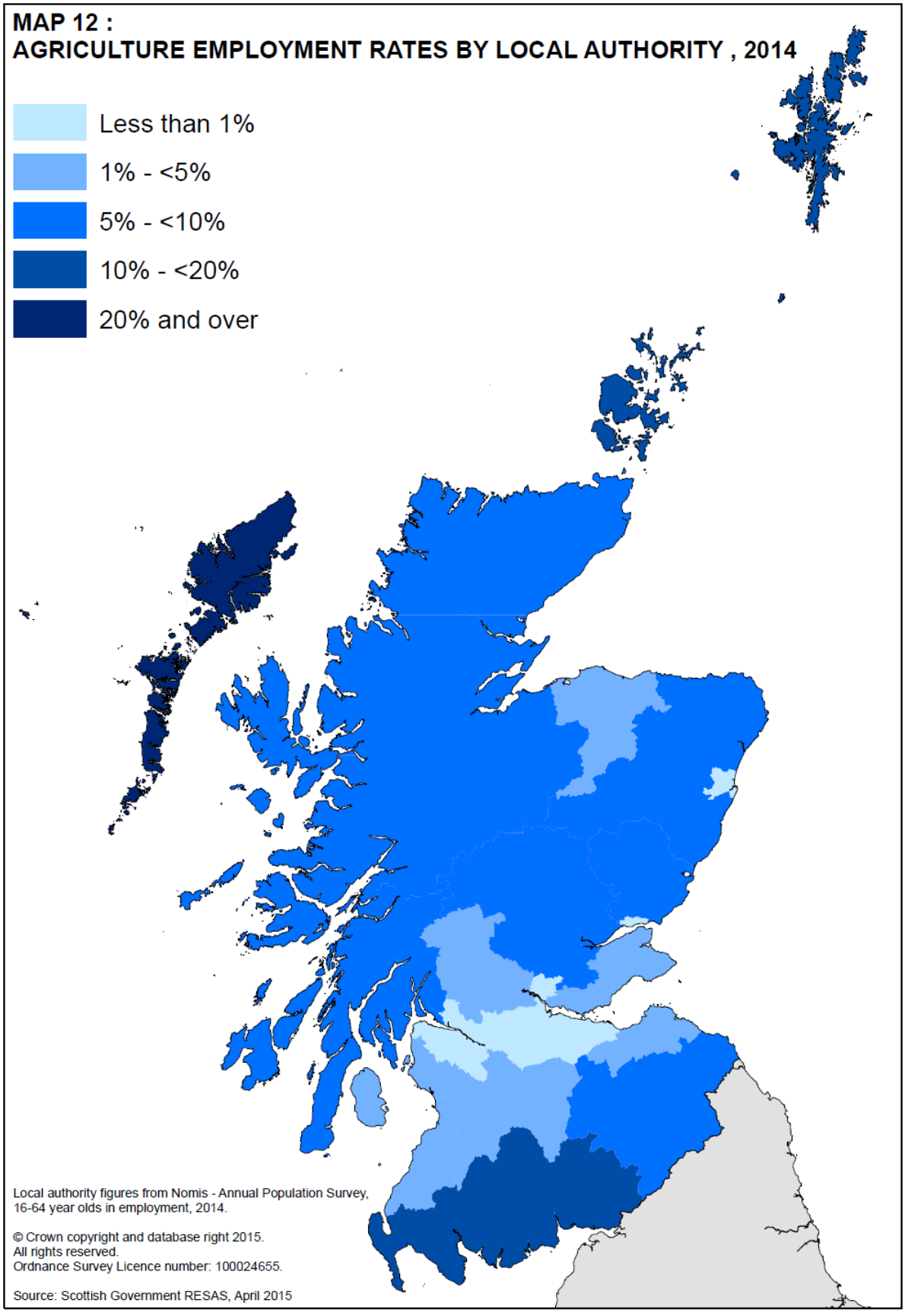
Over half of the total agricultural workforce was located in Grampian (10,700 or 16 per cent), Highland (9,900 or 15 per cent), Tayside (8,500 or 13 per cent) or Dumfries and Galloway (6,900 or ten per cent). These totals represent the number of people employed or working on 1st June 2014, but do not take into account differing working patterns or seasonal labour.

Chart 7.1: Distribution of the workforce by sub-region, June 2014



Map 12 illustrates the employment rates by local authority (number of people employed in agriculture as a percentage of people employed in the area), showing highest levels of employment in agriculture in Eileanan an Iar, Orkney, Shetland and Dumfries and Galloway. In addition, there is also a clear split between local authorities within and outwith the central belt, demonstrating the relative importance of agriculture in terms of employment among these regions.

MAP 12 :
AGRICULTURE EMPLOYMENT RATES BY LOCAL AUTHORITY , 2014



Local authority figures from Nomis - Annual Population Survey, 16-64 year olds in employment, 2014.

Source: Scottish Government RESAS, April 2015

7.2 Structure of the workforce

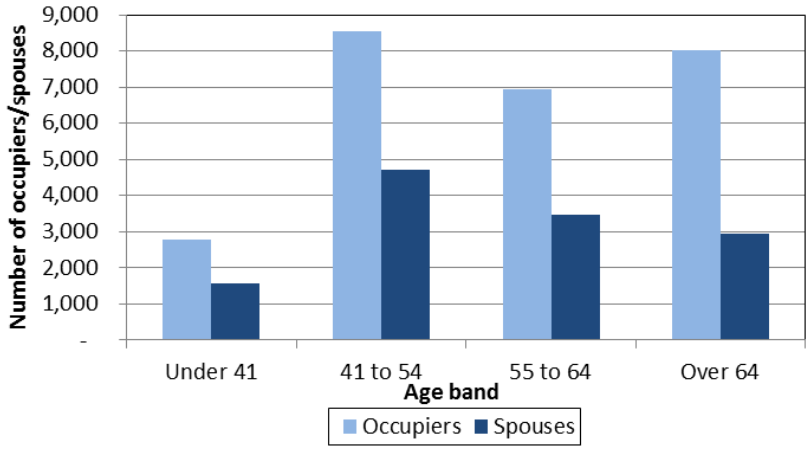
7.2.1 Occupiers and spouses (Tables C20, C21(i), C21(ii))

Just over 50 per cent of holdings in Scotland had a working occupier (26,300 holdings), and 24 per cent had a working spouse (12,700). For working occupiers this figure ranged from 42 per cent in Eileanan an Iar to 63 per cent in Shetland, and for working spouses from 15 per cent in Eileanan an Iar to 32 per cent in Dumfries and Galloway. It should be noted however, that if an occupier or spouse was working on more than one holding, then they would only be recorded against one of these holdings.

In terms of the total workforce, occupiers and spouses made up 59 per cent of the total in Scotland. This percentage was lower in areas where agriculture activities that rely more heavily on employed labour (for example, horticulture) were prevalent, such as Tayside (32 per cent), Fife (38 per cent) and Lothian (40 per cent), but higher in areas such as Orkney (74 per cent), Highland (75 per cent), Shetland (84 per cent) and Eileanan an Iar (90 per cent) where less labour intensive agricultural practices tended to prevail.

Table C20 shows the age and working pattern for working occupiers and spouses. It can be seen that 37 per cent of occupiers (9,600) were working full time on the holding while the other 63 per cent (16,600) were part time. In comparison only 14 per cent of spouses (1,700) worked full time while 86 per cent (11,000) worked part time.

Chart 7.2: Age of occupiers and spouses, June 2014



Regarding the age of working occupiers, chart 7.2 shows that over half (57 per cent or 15,000) were 55 years old or older and only 11 per cent (2,800) were under 41 years old. Working spouses tended to be younger with around half being 55 or over (50 per cent or 6,400).

Chart 7.3 shows the broad age distribution of occupiers, with the proportion aged 65 and over now equal to 31 per cent and increasing over time.

It would be expected that the age profile for business owners would be older than that of the general population, particularly when the business is linked directly to the occupant's housing as it is in farming. It would also be expected that this proportion would be increasing, as it is in the population. Chart 7.4 however shows that the proportion of occupiers aged 65 plus has, in recent years, been increasing at a faster rate than in the population as a whole.

Chart 7.3: Age profile of occupiers, 2004 to 2014

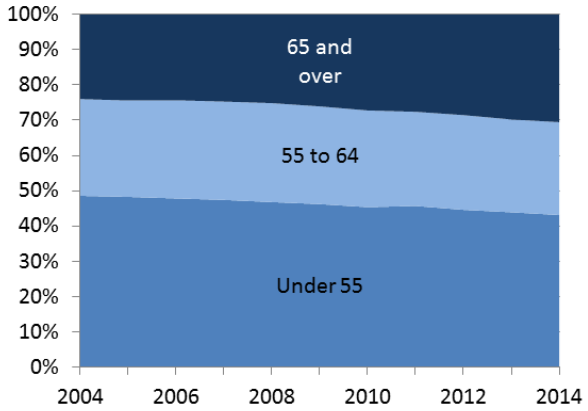
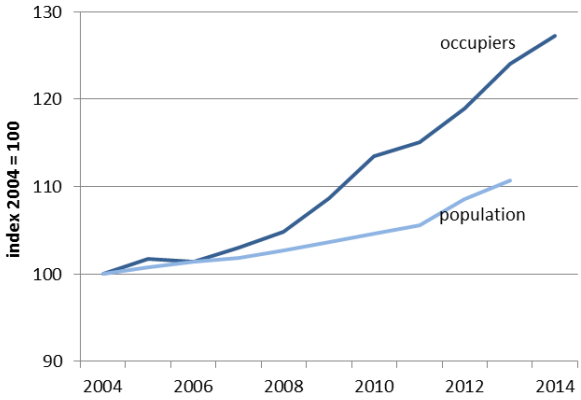


Chart 7.4: Change in proportion of occupiers aged 65+, compared to change in general population



7.2.2 Regular employees (Table C21(i), C21(ii))

There were a total of 20,600 regular employees (excluding occupiers and spouses) on agricultural holdings (13,200 full-time and 7,400 part-time) in Scotland in 2014. As with the total workforce, chart 7.1 shows that over half of regular employees were in Grampian (3,300 or 16 per cent), Tayside (2,800 or 14 per cent), Dumfries & Galloway (2,700 or 13 per cent), and Highland (2,000 or ten per cent).

7.2.3 Casual and seasonal staff (Table C21(i), C21(ii))

Of the total 6,700 casual and seasonal staff in Scotland, just under half (44 per cent or 3,000) were located in Tayside. Tayside and Fife were characterised by having a large casual and seasonal component to their workforce (35 and 24 per cent of their total workforce respectively), supporting the seasonal demand for harvesting fruit and vegetables.

7.3 Standard Labour Requirements (Tables C23, C25, C26)

Standard Labour Requirements (SLR) represent the notional amount of labour required by a holding to carry out all of its agricultural activity and is also used as a measure of farm size. Standard Labour Requirements are derived at an aggregate level for each agricultural activity. The total SLR for each farm is calculated by multiplying its crop areas and livestock numbers by the appropriate SLR coefficients and then summing the results for all agricultural activity on that farm. One SLR equates to 1,900 working hours per year.

The SLR coefficients used in this publication are based on values in the year 2004 and have been applied to the 2014 crop areas and livestock units of holdings.

The total SLR for Scotland was 46,700 full time equivalent workers, averaging 0.89 per holding. The SLR full-time equivalent total was less than the total labour figure reported in section 7.1, due to the fact that the labour total (66,300 people) is a headcount (i.e. a part-time worker working for a year would equate to less than one SLR).

Chart 7.5: Standard Labour Requirements by farm type, June 2014

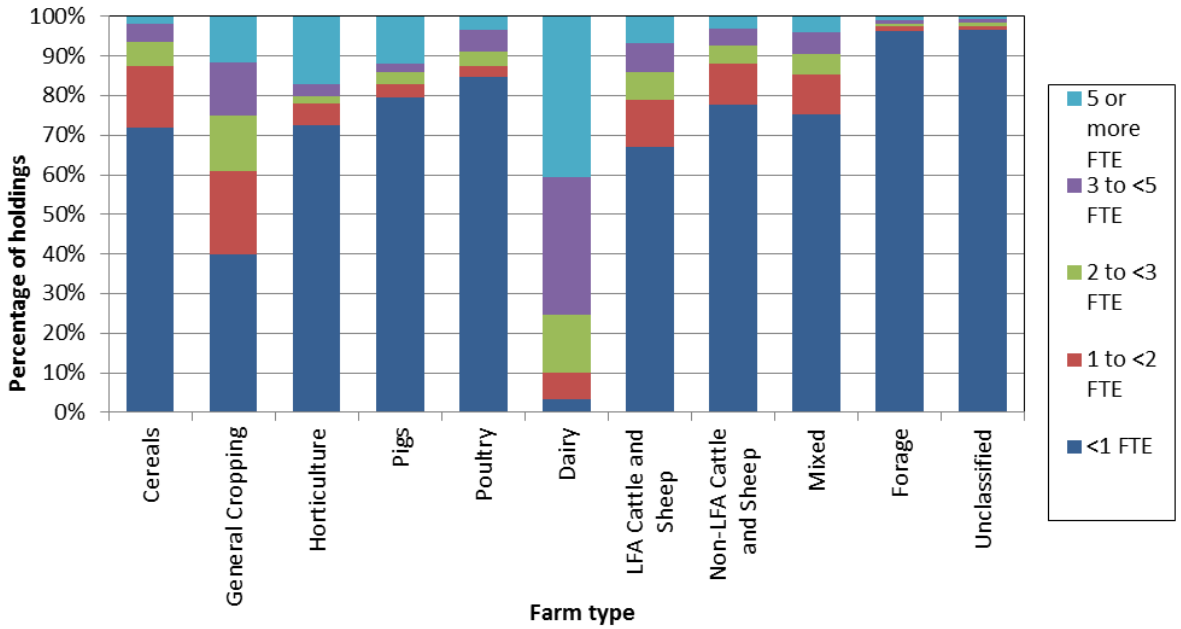


Chart 7.5 shows the SLR distribution by farm type. It shows that just three per cent of dairy holdings had an SLR of less than one full-time equivalent (FTE) and 76 per cent had an SLR of three or more.

General cropping (60 per cent) was the only other farm type where the majority of holdings had an SLR of one or more. Farm types which had the highest proportions of holdings with less than one SLR, and thus can be viewed as requiring less labour in general over the year, were unclassified holdings (97 per cent), forage (96 per cent), specialist poultry (85 per cent), specialist pig (79 per cent) and non-LFA cattle & sheep (78 per cent). However, it should be noted that those holdings with more than one SLR among farm types such as specialist pig and poultry account for a large proportion of output in these sectors, due to their highly concentrated production (as illustrated in sections 5.4.2 and 5.5.2 respectively).

Please note also that SLR is a measure of labour requirement averaged over the whole year. Therefore, where a large number of workers are casual or seasonal labour, such as is likely in horticulture, these will not necessarily equate to a large SLR.

Chart 7.6 shows the share of national SLRs by farm type, providing comparison with Standard Outputs (SO). Cattle & sheep (LFA) holdings accounted for 41 per cent of total SLRs compared to their 23 per cent share of SO. This means that this farm type had a much higher labour requirement in proportion to its total SO.

By contrast, most other farm types, including general cropping, horticulture, poultry, pigs, dairy and cereals holdings had a higher share of Scotland's SO total in comparison to their share of SLRs.

Chart 7.6: Distribution of total Standard Outputs and Standard Labour Requirements by farm type, June 2014

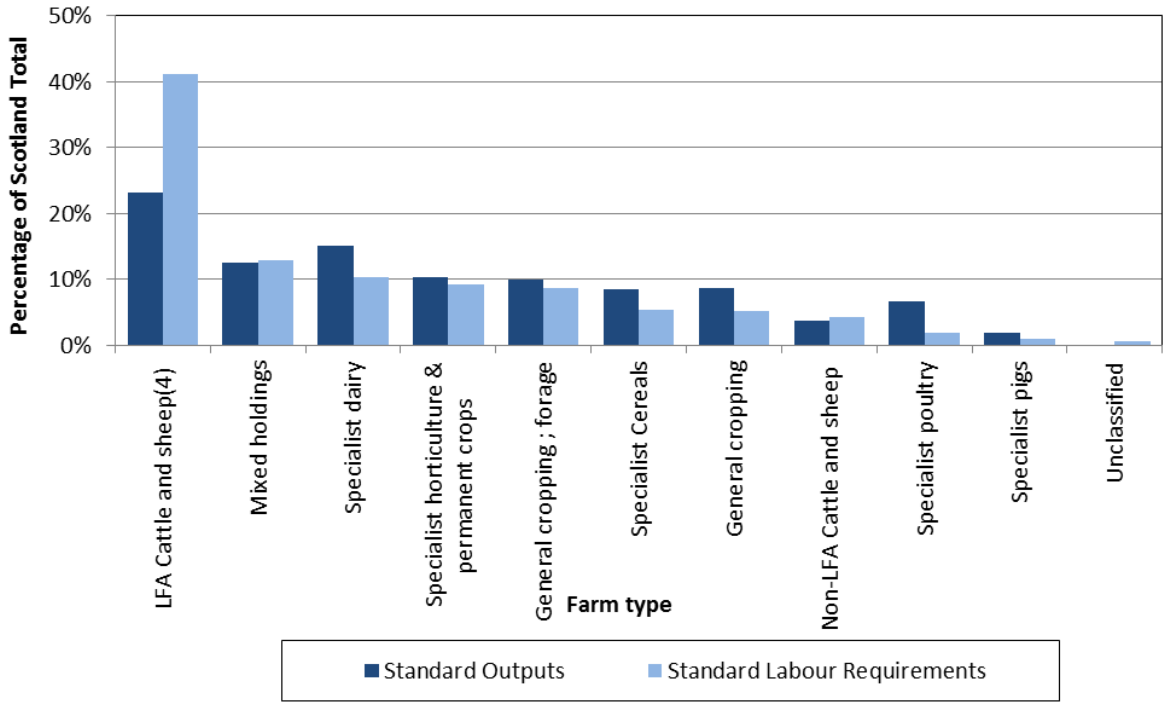
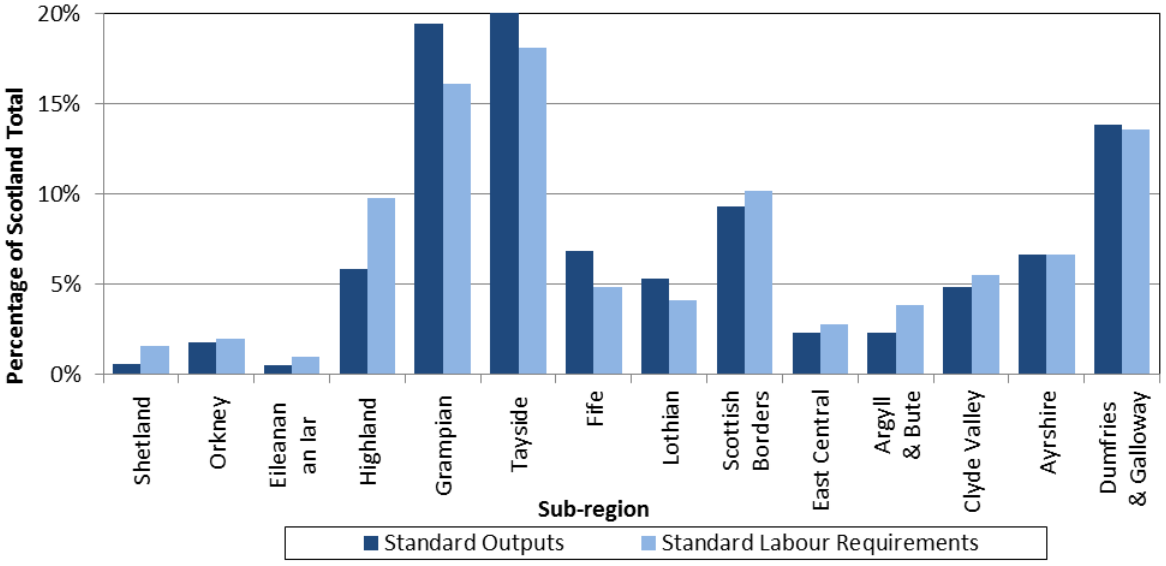


Chart 7.7 shows the geographic distribution of SLRs, in comparison with SOs. Sub-regions with a lower share of SLRs compared to SOs, such as Grampian, Tayside, Fife and Lothian, had higher proportions of farm types such as general cropping, cereal and horticulture. In a number of cases, sub-regions with a higher share of SLRs compared to SO, such as Highland, Scottish Borders and Argyll & Bute had a higher proportion of cattle & sheep (LFA) holdings.

Chart 7.7: Distribution of total Standard Outputs and Standard Labour Requirements by sub-region, June 2014



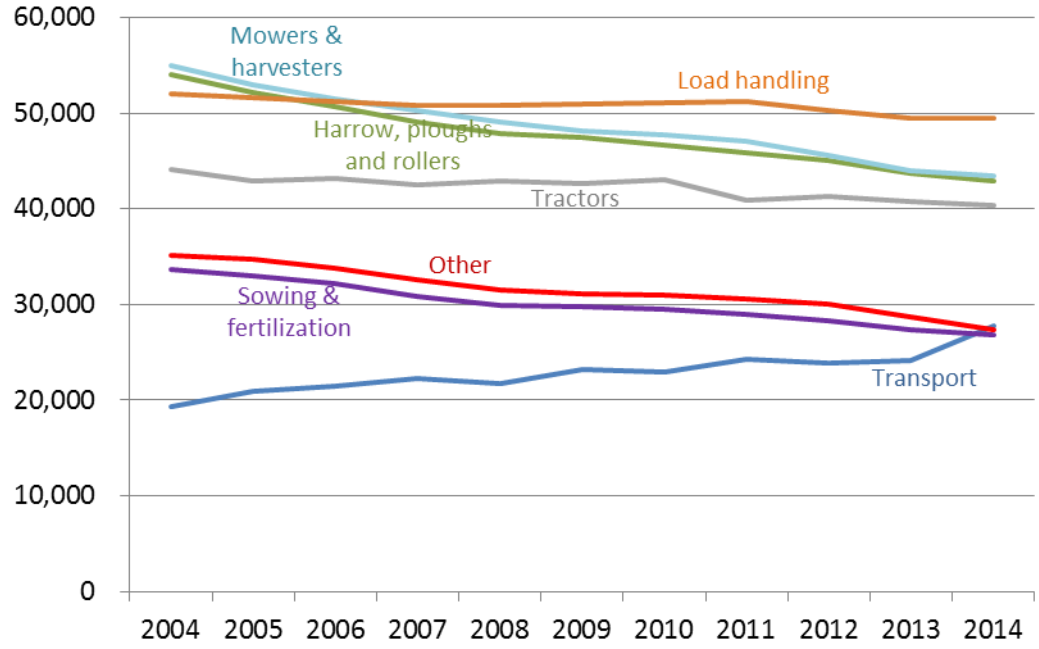
7.4 Machinery (Tables C27)

Information on tractors is collected every year in the December Survey, while data on other machinery is collected in alternate years. The data relate only to the larger agricultural holdings that are surveyed in December. The results represent approximately 21,600 holdings, or 91 per cent of agricultural land.

When considering trends in machinery, it should be noted that a large amount of agricultural work is done using contractors and their machinery, and these may not necessarily be included within the survey responses.

Chart 7.8 shows that the numbers in most categories of machinery have fallen over the last ten years. Within tractors, there has been an increase in the number of more powerful tractors (those over 108 horsepower), but this has not kept pace with the drop in the number of less powerful ones. Only in transport vehicles has there been an increase, with the numbers increasing 44 per cent between 2004 and 2014, though the increase in 2014 may have been due to a change in the way the data were collected.

Chart 7.8: Machinery, 2004 to 2014



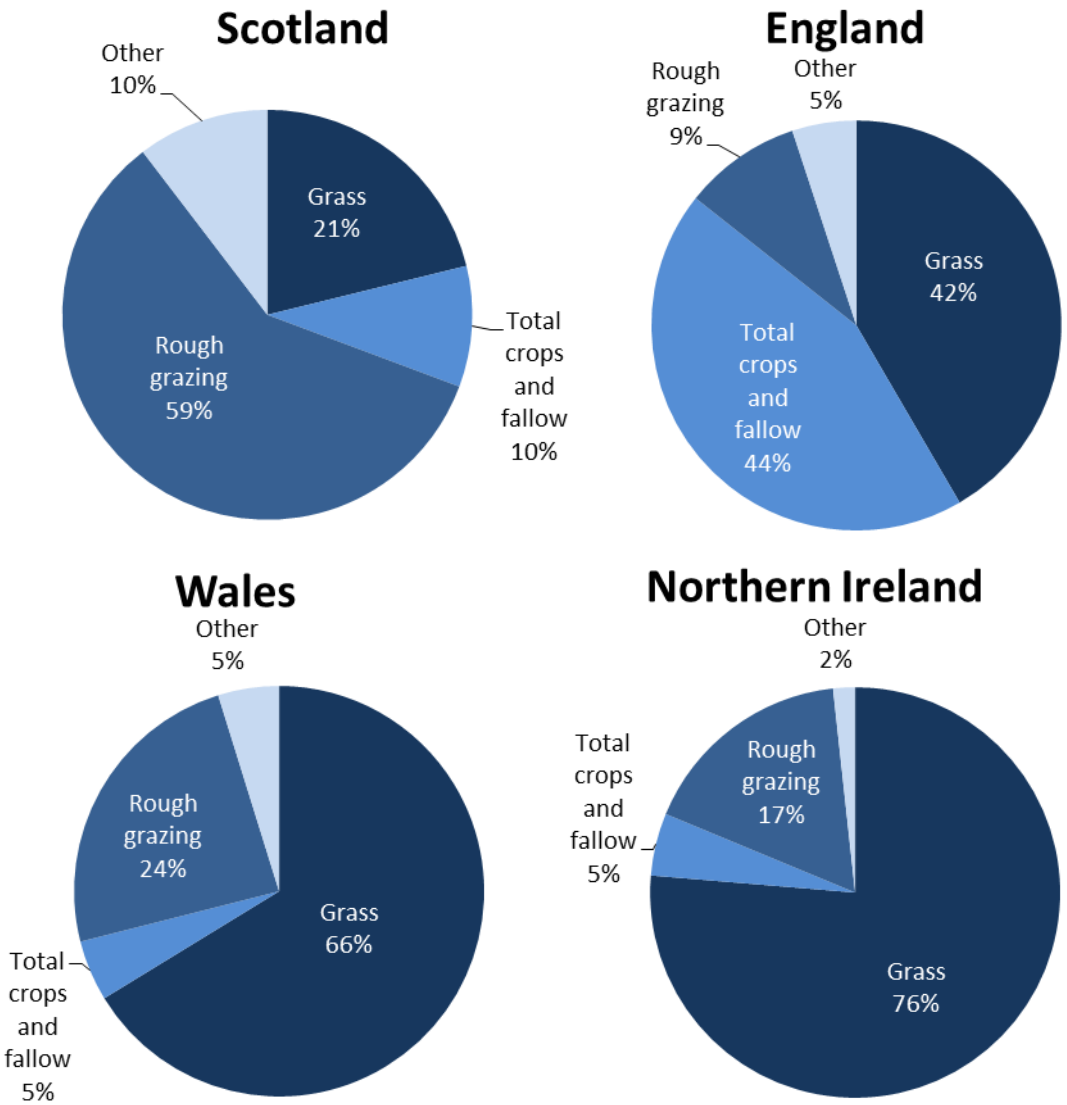
8. Comparison with Other UK Nations

8.1 Land use (Table C2)

The total agricultural area in Scotland, including common grazing, totalled 6.18 million hectares in 2014, representing 78 per cent of the total land area in Scotland. This proportion of total land cover is slightly higher than England and Northern Ireland (both 73 per cent) but lower than Wales (87 per cent).

The majority (59 per cent) of agricultural land in Scotland was rough grazing or common grazing (3.64 million hectares), a far higher proportion than in other UK countries, due to large areas of upland agricultural land in Scotland being suitable only for livestock grazing. In contrast grass covered 21 per cent of agricultural land in Scotland (1.31 million hectares), a far lower proportion than elsewhere in the UK.

Chart 8.1: Agricultural area for each UK country by land use, June 2014



Total crops and fallow land made up 589,000 hectares in Scotland (ten per cent of total agricultural area), double the proportions in Wales and Northern Ireland (both five per cent) but much lower than in England (44 per cent).

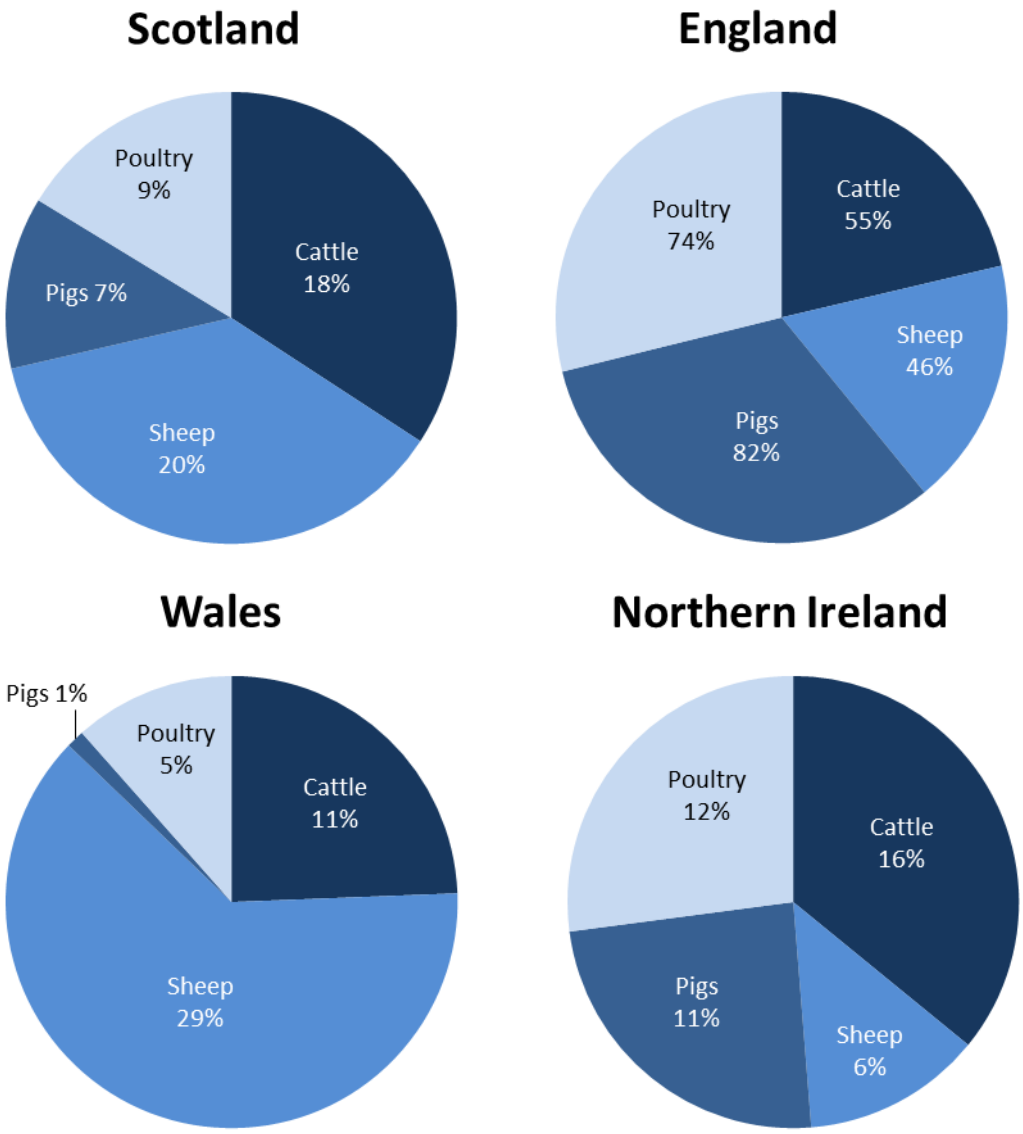
Total crops and fallow land in Scotland (589,000 hectares) made up 12 per cent of the UK total (5.0 million hectares). The following crops in Scotland accounted for large proportions of the UK total; spring barley (274,000 hectares or 42 per cent of the UK total) and potatoes (28,500 hectares or 20 per cent). The large area of spring barley can be partially accounted for by the demand of the whisky industry in Scotland, with spring barley the key ingredient for malting, though most barley in Scotland is used for animal feed. Conversely, the following crops accounted for much lower proportions of the UK total; maize (1,300 hectares or one per cent), orchard and soft fruit (757 hectares or two per cent) and oilseed crops (37,100 hectares or five per cent).

8.2 Livestock (Table C8)

Chart 8.2 shows the share each country had of the UK population for each of the main livestock groups. Please note, it does not show the share of each nation's livestock – percentages within each pie chart do not add to 100. Rather it allows us to see which livestock sector each nation was relatively dominant in.

Scotland had a higher share of UK cattle (18 per cent) and sheep (20 per cent) compared to pigs (seven per cent) and poultry (nine per cent).

Chart 8.2: Percentage share of UK livestock, by country, June 2014

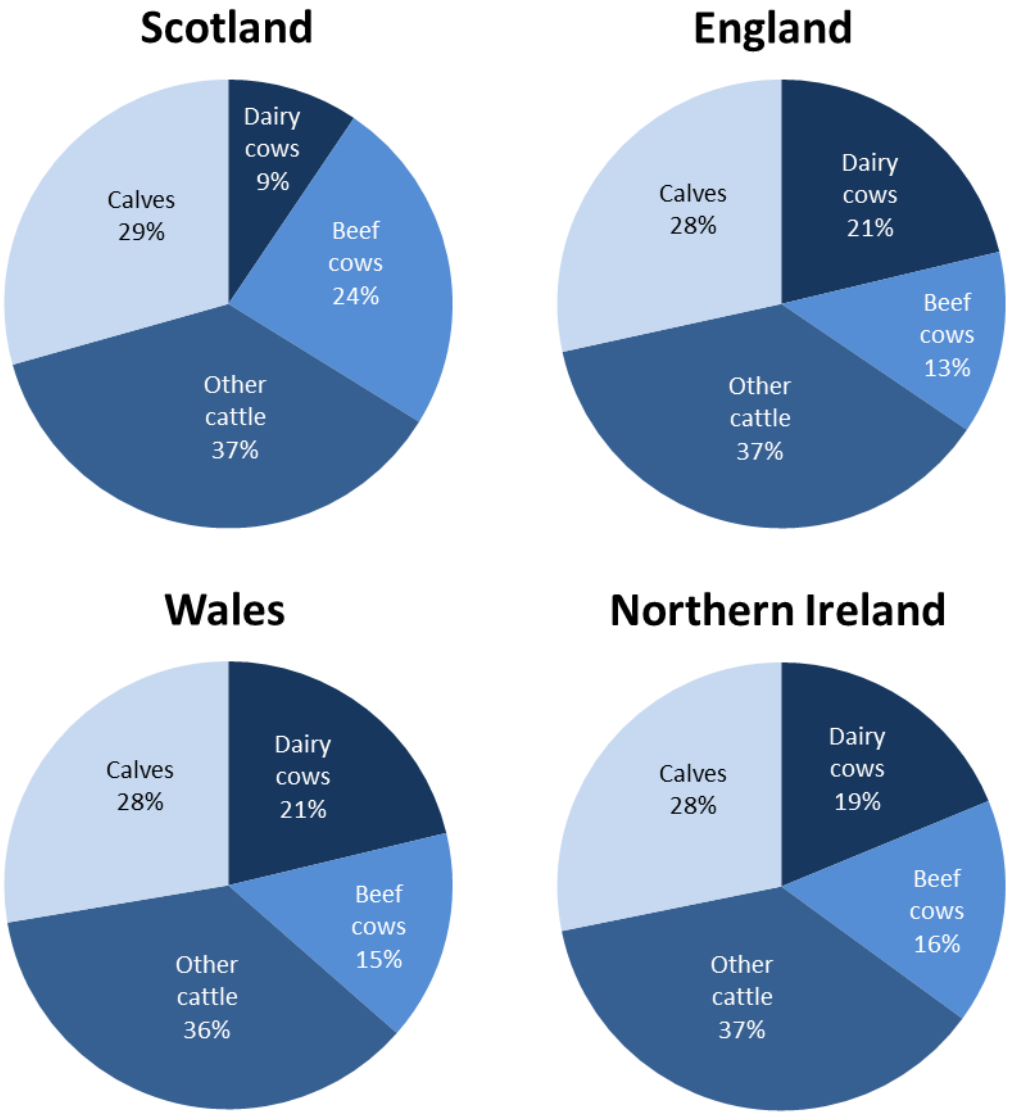


Northern Ireland had a similar share to Scotland for cattle, pigs and poultry but with a much lower share for sheep. Compared to Scotland, Wales had a higher share of sheep and a lower share of other livestock groups (including a particularly low number of pigs).

England, naturally, had the highest share of all livestock groups but with a profile opposite to Scotland, with a larger share of the pig and poultry populations in comparison to cattle and sheep.

Chart 8.3 shows the proportion of different types of cattle[14] within each country. In Scotland, the number of beef cows (constituting 24 per cent of total cattle in Scotland) was larger than the number of dairy cows (nine per cent), contrasting with the profiles in England, Wales and Northern Ireland, where the numbers of dairy outstripped the number of beef cows.

Chart 8.3: Cattle type, by country, June 2014

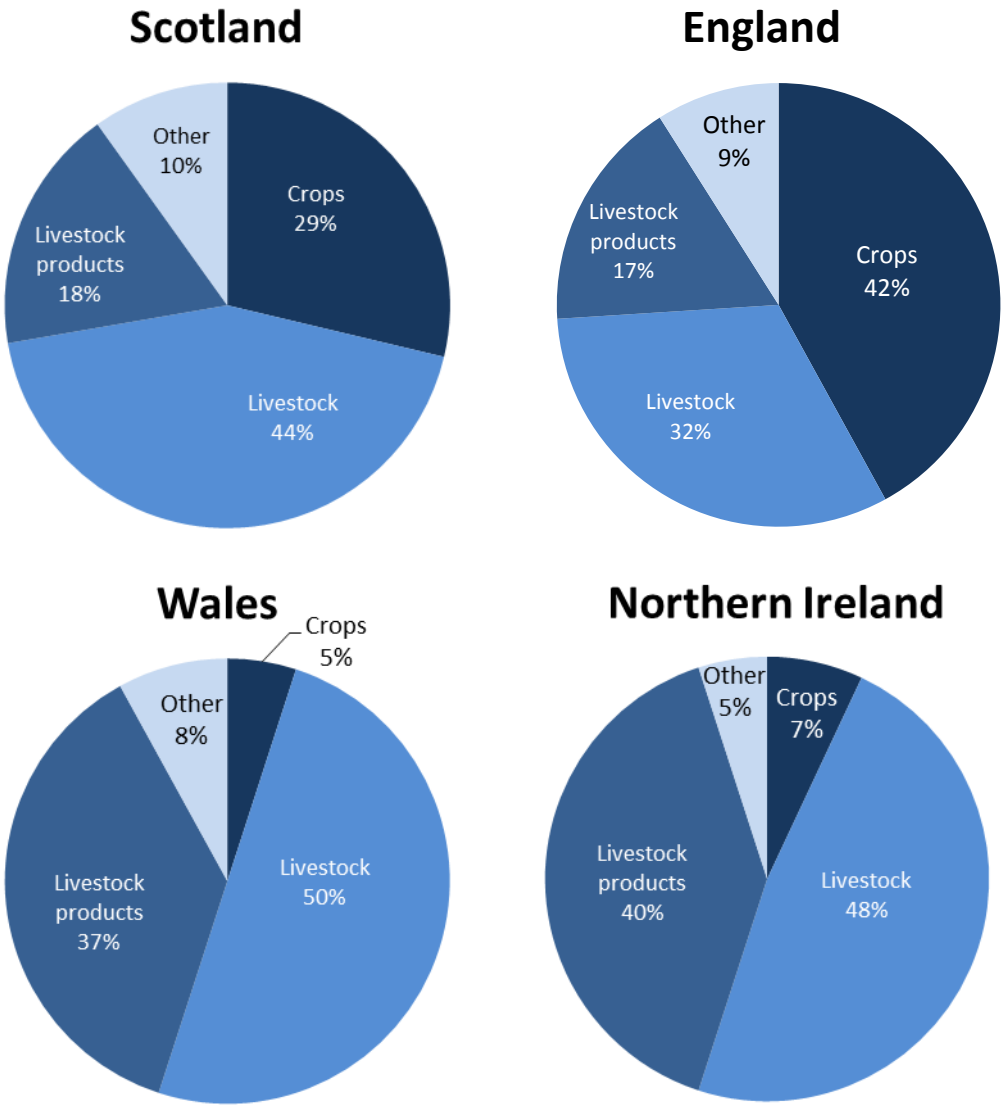


[14] Dairy and beef cows are defined as female cattle aged two years and over, with offspring.

8.3 Output from farming

Chart 8.4 shows the comparative importance of each sector to a country's total output. While a large proportion of Scottish output came from livestock, Scotland also had significant cereal, horticulture and potato sectors. Crops played a more important part in England, while in both Wales and Northern Ireland there was a particularly high reliance on livestock and livestock products.

Chart 8.4: Comparison of relative importance of sector to total output, by country, 2014[15]



[15] 2013 data for England

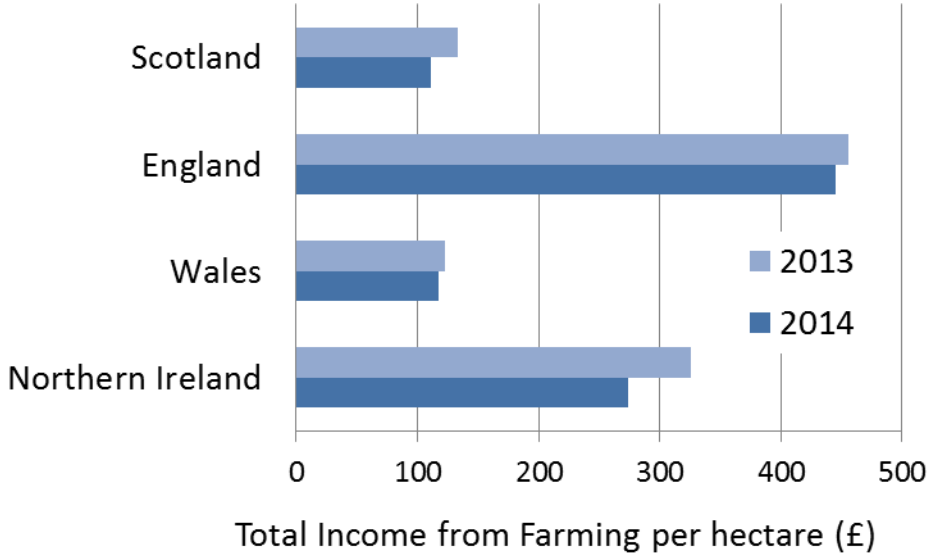
8.4 Total Income from Farming

Estimated Total Income from Farming for 2014 was £688 million in Scotland, about £4,200 million in England, £283 million in Northern Ireland and £212 million in Wales.

However these differences are partly due to the different sizes of the countries. If the total hectarage of agricultural area is taken into account, agriculture generated about £445 per hectare in England, £274 per hectare in Northern Ireland, £117 per hectare in Wales and £111 per hectare in Scotland.

Chart 8.5 shows the estimated Total Income from Farming, calculated per hectare, for 2013 and 2014. Please note that 2014 figures are very much a first estimate and are likely to change when updated next year.

Chart 8.5 Total Income from Farming per hectare, 2013 and 2014

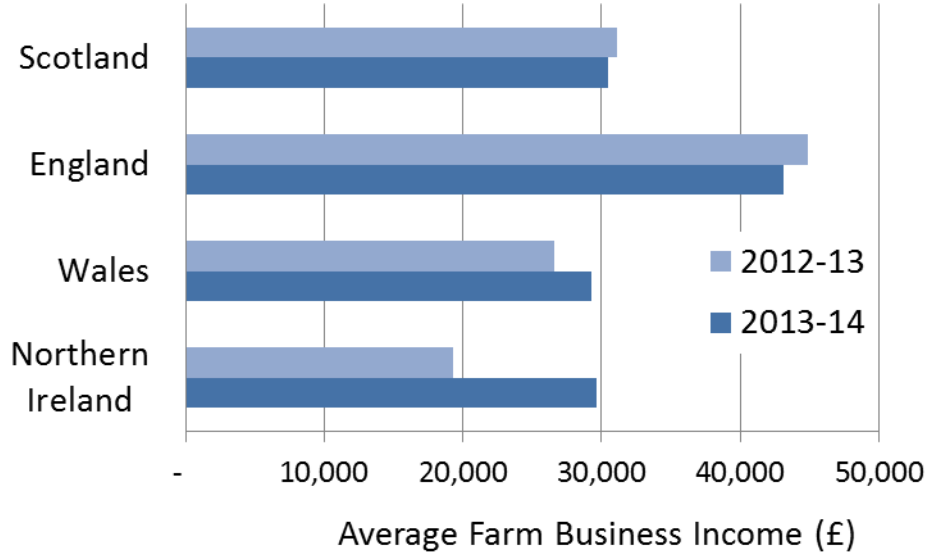


8.5 Farm Business Income

Chart 8.6 shows the estimated average Farm Business Income for 2012-13 and 2013-14 for UK nations. The highest average value for 2013-14 (i.e. the 2013 crop year) was in England at £43,100, with Scotland at £30,500 just above Northern Ireland at £29,600 and Wales at £29,300.

While Scotland's average farm business income estimates have remained largely unchanged (down one per cent on 2012-13), incomes in England saw a larger decline (down four per cent). In comparison, average farm business income is estimated to have risen in both Northern Ireland and Wales over the period, by 53 per cent and ten per cent respectively. It should be noted that while survey methodologies are harmonised across the UK the coverage of surveys in each country differs. For example, in England the Farm Business Survey includes results from horticulture, pigs and poultry farms. More information on UK surveys is available from the respective departments[16].

Chart 8.6 Farm Business Income by UK country: 2012-13 and 2013-14



[16] Department for Environment, Food and Rural Affairs (DEFRA), England. www.gov.uk/defra
Department for Agriculture and Rural Development (DARD), Northern Ireland. www.dardni.gov.uk
Welsh Government, Wales. www.wales.gov.uk/statistics-and-research

Tables

Table A1 Output, input and income, 2010 to 2014

£ million

OUTPUT	2010	2011	2012	2013	2014 (prov)
Cereals:					
Wheat	120.6	145.9	114.7	116.1	130.6
Barley	213.2	292.9	314.4	284.7	232.7
Oats	16.0	19.7	20.8	25.8	16.9
Triticale	0.5	0.6	0.4	0.5	0.4
1. Total cereals	**350.3**	**459.1**	**450.3**	**427.0**	**380.6**
Cereals net of subsidies	*350.3*	*459.1*	*450.3*	*427.0*	*380.6*
Other crops:					
Potatoes	184.7	199.9	164.5	275.2	169.9
Oilseed rape	39.5	53.0	39.4	32.6	35.5
Other farm crops	10.8	12.0	12.6	11.0	8.7
2. Total other crops	**235.1**	**264.9**	**216.5**	**318.8**	**214.1**
Other crops net of subsidies	*235.1*	*264.9*	*216.5*	*318.8*	*214.1*
Horticulture:					
Vegetables	111.6	108.8	101.5	132.7	130.5
Fruit	84.1	81.4	72.1	94.2	91.7
Flowers and nursery stock	38.4	38.5	49.0	47.3	53.1
3. Total horticulture	**234.1**	**228.7**	**222.7**	**274.2**	**275.3**
Finished livestock:					
Finished cattle and calves	563.5	628.7	668.9	669.8	660.6
Finished sheep and lambs	196.4	213.5	197.1	175.5	202.7
Finished pigs	72.1	88.9	83.2	78.6	93.8
Poultry	93.2	105.0	117.1	117.5	99.6
Other livestock	24.8	25.9	23.2	27.0	25.6
4. Total finished livestock	**950.0**	**1,061.9**	**1,089.5**	**1,068.5**	**1,082.2**
Finished livestock net of subsidies	*928.0*	*1,040.0*	*1,069.1*	*1,047.7*	*1,061.5*
Store livestock:					
Store cattle	21.9	32.3	43.5	45.5	30.7
Store calves	11.9	17.0	25.0	26.3	19.1
Store sheep	14.4	14.5	12.1	11.6	12.5
5. Total store livestock	**48.1**	**63.8**	**80.5**	**83.4**	**62.3**
Livestock products:					
Milk and milk products	318.9	349.5	366.3	423.2	446.7
Eggs for food	66.9	73.4	73.5	78.4	78.4
Clipwool	6.5	8.2	5.3	6.2	6.4
Other livestock products	4.8	4.6	3.4	4.4	5.2
6. Total livestock products	**397.1**	**435.7**	**448.5**	**512.2**	**536.8**
Livestock products net of subsidies	*397.1*	*435.7*	*448.5*	*512.2*	*536.8*
Capital formation:					
Cattle	70.1	79.7	107.5	111.3	126.9
Sheep	33.4	33.3	37.7	38.2	34.0
Pigs	0.8	0.8	0.7	1.0	0.8
Poultry	22.0	25.5	21.7	24.5	24.3
7. Total capital formation	**126.3**	**139.3**	**167.6**	**175.0**	**186.0**
8. Total other agricultural activities	**80.8**	**82.3**	**80.7**	**83.6**	**84.5**
9. Total non-agricultural activities	**146.8**	**181.3**	**178.4**	**209.4**	**227.3**
10. GROSS OUTPUT AT BASIC PRICES (1+2+3+4+5+6+7+8+9)	**2,568.7**	**2,917.1**	**2,934.6**	**3,151.9**	**3,049.1**
Gross output at basic prices net of subsidies	*2,546.6*	*2,895.1*	*2,914.2*	*3,131.1*	*3,028.4*

Table A1 (ctd) Output, input and income, 2010 to 2014

£ million

INPUT	2010	2011	2012	2013	2014 (prov)
11. Total feedstuffs	**536.2**	**589.5**	**657.6**	**684.1**	**644.3**
12. Total seeds	**74.1**	**78.0**	**89.5**	**85.0**	**78.8**
13. Total fertilisers and lime	**146.9**	**181.7**	**199.1**	**199.9**	**168.6**
Farm maintenance:					
Occupier	65.1	75.3	78.9	82.4	84.2
Landlord	6.2	8.9	8.6	8.5	8.3
14. Total farm maintenance	**71.3**	**84.3**	**87.5**	**90.9**	**92.6**
Miscellaneous expenditure:					
Machinery repairs	105.9	117.0	116.6	116.6	119.0
Fuel and oil	115.0	141.9	145.2	140.7	126.9
Other machinery expenses	25.3	23.7	23.5	24.5	24.3
Veterinary expenses and medicines	53.3	56.1	58.0	62.4	64.8
Crop protection	66.9	69.9	75.2	66.1	62.2
Contract work	87.7	88.5	89.2	91.5	92.2
Other farm costs	352.0	377.3	382.1	397.0	414.6
15. Total miscellaneous expenses	**806.0**	**874.5**	**889.7**	**898.8**	**904.0**
16. FISIM (Financial Intermediation Services Indirectly Measured)	**30.5**	**32.9**	**35.2**	**37.5**	**38.8**
17. Total Non-Agricultural Activities	**59.1**	**55.9**	**58.3**	**56.6**	**57.8**
18. GROSS INPUT[1] (11+12+13+14+15+16+17)	**1,724.1**	**1,896.9**	**2,016.9**	**2,052.8**	**1,984.8**
19. GROSS VALUE ADDED[2] (10-18)	**844.5**	**1,020.2**	**917.7**	**1,099.1**	**1,064.3**
Gross value added net of subsidies	*822.5*	*998.3*	*897.3*	*1,078.3*	*1,043.6*
Consumption of fixed capital:					
Plant machinery and vehicles	151.8	158.6	165.0	166.7	164.0
Building and works	104.3	103.5	105.9	100.9	99.9
Cattle	70.3	97.9	118.8	101.7	121.4
Sheep	34.8	35.6	34.6	40.9	35.2
Pigs	0.6	1.1	0.9	1.0	1.0
Poultry	19.9	22.6	25.0	23.1	23.8
20. Total consumption of fixed capital	**381.8**	**419.2**	**450.2**	**434.3**	**445.4**
21. NET VALUE ADDED (at basic price)(19-20)	**462.7**	**601.0**	**467.5**	**664.8**	**618.9**
Net value added (at basic price) net of subsidies	*440.7*	*579.1*	*447.1*	*644.1*	*598.2*
Other subsidies:					
Single Farm Payment	479.5	483.0	444.9	445.9	382.4
Less-Favoured Areas Support Scheme	63.6	66.6	65.6	65.1	65.5
Land Management Contract Menu Scheme	17.1	6.6	0.2	0.1	0.0
Land Managers Options	0.9	3.5	5.8	6.8	5.0
Rural Stewardship Scheme	7.8	4.0	0.7	0.2	0.1
Rural Priorities	22.2	31.8	32.7	33.0	35.3
Environmentally Sensitive Areas	1.5	0.6	0.2	0.0	0.0
Other Agri Environmental Schemes[3]	6.9	6.0	3.5	2.9	2.3
Other	2.8	0.0	0.0	6.2	0.0
22. Total other subsidies	**602.3**	**602.0**	**553.6**	**560.3**	**490.6**
Total payments and subsidies	*624.3*	*623.9*	*574.0*	*581.0*	*511.3*
23. NET VALUE ADDED AT FACTOR COST[4] (21+22)	**1,065.1**	**1,203.0**	**1,021.1**	**1,225.1**	**1,109.5**
24. Hired labour[5]	**335.6**	**357.9**	**336.4**	**345.8**	**361.0**
25. Interest	**39.4**	**39.3**	**41.6**	**42.2**	**43.4**
26. Net rent	**13.8**	**14.2**	**13.4**	**13.7**	**17.5**
27. TOTAL INCOME FROM FARMING (23-(24+25+26))	**676.3**	**791.7**	**629.8**	**823.5**	**687.5**

(1) Also known as Total Intermediate Consumption.
(2) Formerly known as Gross Product.
(3) Includes Countryside Premium Scheme, Farm Woodland Scheme, Farm Woodland Premium Scheme, Organic Aid Scheme and elements of Habitats and Heather Moorland Schemes.
(4) Formerly known as Net Product.
(5) Also known as Compensation of Employees.

Table A2 (i) Area of cereals[1], root crops and horticultural crops, 2010 to 2014

'000 ha

	Average 2010-14	2010	2011	2012	2013	2014 (prov)
Wheat	104.7	111.4	115.4	100.6	86.8	109.0
Winter barley	46.3	48.0	45.5	42.8	42.7	52.5
Spring barley	273.1	242.4	262.9	289.2	296.4	274.4
Total barley	319.4	290.4	308.4	332.0	339.1	326.9
Oats	25.0	23.0	21.7	23.7	31.7	25.1
Triticale	0.6	0.7	0.6	0.6	0.5	0.5
Oilseed rape	36.4	36.0	38.4	36.6	33.7	37.1
Potato – early ware[2]	0.3	0.4	0.3	0.2	0.3	0.2
Potato – maincrop ware [2]	18.5	19.4	19.3	18.5	18.0	17.2
Potato – seed[2]	11.2	11.6	11.5	10.8	10.9	11.1
Vining peas	6.6	6.5	6.3	6.6	6.6	6.9
Tomatoes (ha)	3.2	3.1	3.9	3.3	3.3	2.6
Raspberries	0.4	0.5	0.5	0.4	0.4	0.3
Strawberries	0.9	0.9	0.9	0.9	0.9	0.9

Table A2 (ii) Estimated yield of cereals[1], root crops and horticultural crops, 2010 to 2014

tonnes per ha

	Average 2010-14	2010	2011	2012	2013	2014 (prov)
Wheat	8.0	8.6	8.3	6.7	7.5	9.1
Winter barley	7.1	7.2	7.3	6.5	6.6	7.8
Spring barley	5.7	5.8	5.8	5.0	5.8	6.1
Total barley	5.9	6.0	6.1	5.2	5.9	6.3
Oats	5.7	6.3	5.6	4.6	5.9	6.1
Triticale	5.3	5.2	5.5	3.6	5.5	6.4
Oilseed rape	3.5	3.4	3.9	2.9	3.3	4.0
Potato – early ware[2]	15.4	8.4	14.8	21.0	9.4	23.5
Potato – maincrop ware[2]	41.6	46.4	42.3	32.8	42.3	44.1
Potato – seed[2]	26.7	27.7	28.1	24.3	27.3	26.2
Vining peas	4.3	4.6	4.2	3.1	4.4	5.0
Tomatoes	182.4	181.9	183.3	175.9	187.8	182.9
Raspberries	6.9	5.6	6.1	6.3	7.5	9.1
Strawberries	23.4	23.2	23.0	18.1	25.9	27.0

Table A2 (iii) Estimated production[3] of cereals[1], root crops and horticultural crops, 2010 to 2014

'000 tonnes

	Average 2010-14	2010	2011	2012	2013	2014 (prov)
Wheat	845.2	953.2	957.0	673.3	652.9	989.3
Winter barley	329.4	345.6	333.6	276.5	280.5	410.8
Spring barley	1,553.7	1,410.3	1,533.0	1,446.9	1,713.5	1,664.9
Total barley	1,883.1	1,755.9	1,866.6	1,723.5	1,994.1	2,075.7
Oats	143.0	145.1	121.8	108.2	187.0	152.9
Triticale	3.0	3.6	3.5	2.0	2.8	3.3
Oilseed rape	127.7	123.3	149.6	106.4	111.7	147.6
Potato – early ware[2]	3.9	3.4	4.4	4.2	2.8	4.7
Potato – maincrop ware[2]	768.7	899.7	816.7	607.1	760.9	758.9
Potato – seed[2]	298.8	322.1	321.9	262.7	296.2	290.9
Vining peas	28.1	30.3	26.6	20.3	28.9	34.4
Tomatoes	0.6	0.6	0.7	0.6	0.6	0.5
Raspberries	2.9	3.0	3.2	2.5	2.7	2.9
Strawberries	21.8	21.6	21.4	16.9	23.8	25.2

(1) Crop yield estimates are taken mainly from the Cereal Production Survey. Some estimation from industry experts has been included in the yield and production estimates for winter barley, oats, triticale and oilseed rape.

(2) The yield and production figures are partly based on Scottish Agricultural College and British Potato Council estimates.

(3) Production is valued at the point it is used or sold off the farm, so there can be differences between production volumes presented here and output volumes presented in subsequent tables.

Table A3 Output and utilisation of cereals and oilseed rape, 2010 to 2014[1]

	Unit	2010	2011	2012	2013	2014 (prov)
Wheat[2]						
Human and industrial	'000 tonnes	703.4	626.6	638.4	401.4	671.7
Seed[3]	"	15.7	13.5	14.0	9.3	15.0
Feed and other[4]	"	295.2	248.9	195.6	143.5	191.7
Total marketings	"	**1,014.3**	**889.0**	**848.0**	**554.2**	**878.5**
Stock change	"	-61.0	68.0	-174.8	98.7	110.8
Total quantity of output	"	**953.2**	**957.0**	**673.3**	**652.9**	**989.3**
Market price[5]	£ per tonne	128.27	151.81	179.04	179.43	132.53
Market value	£ millions	130.10	134.96	151.83	99.44	116.43
Stock change[6]	"	-9.49	10.91	-37.12	16.62	14.16
Total value of output	"	**120.61**	**145.87**	**114.71**	**116.06**	**130.58**
Barley[2]						
Human and industrial	'000 tonnes	652.6	686.5	670.1	601.5	677.6
Seed[3]	"	44.1	41.4	39.6	47.4	47.1
Feed and other[4]	"	1,262.3	1,153.0	1,000.4	1,245.1	1,323.9
Total marketings	"	**1,959.0**	**1,880.9**	**1,710.0**	**1,894.0**	**2,048.6**
Stock change	"	-203.1	-14.3	13.4	100.0	27.1
Total quantity of output	"	**1,755.9**	**1,866.6**	**1,723.5**	**1,994.1**	**2,075.7**
Market price	£ per tonne	123.00	156.92	182.36	143.07	112.17
Market value	£ millions	240.95	295.14	311.84	270.98	229.79
Stock change[6]	"	-27.78	-2.28	2.52	13.71	2.91
Total value of output	"	**213.17**	**292.86**	**314.36**	**284.69**	**232.71**
Oats[2]						
Human and industrial	'000 tonnes	106.2	110.6	85.5	133.6	131.3
Seed[3]	"	3.7	3.9	3.3	4.8	4.7
Feed and other[4]	"	40.9	14.0	17.1	17.0	25.2
Total marketings	"	**150.9**	**128.5**	**106.0**	**155.3**	**161.1**
Stock change	"	-5.8	-6.6	2.3	31.7	-8.2
Total quantity of output	"	**145.1**	**121.8**	**108.2**	**187.0**	**152.9**
Market price	£ per tonne	110.84	162.81	192.35	139.37	110.10
Market value	£ millions	16.72	20.92	20.38	21.64	17.74
Stock change[6]	"	-0.69	-1.17	0.45	4.14	-0.85
Total value of output	"	**16.03**	**19.75**	**20.83**	**25.78**	**16.89**
Oilseed rape[2]						
Total marketings	'000 tonnes	123.3	149.6	106.4	111.7	147.6
Market price	£ per tonne	320.50	354.47	370.00	291.60	240.50
Total value of output	**£ millions**	**39.53**	**53.04**	**39.38**	**32.56**	**35.49**

(1) Output data are for calendar years (except oilseed rape) and so reflect the influence of two crop years. Oilseed rape data are for crop year.
(2) Includes all production whether sold off or consumed on the national farm.
(3) Excludes seed retained on farm of origin or sold farm-to-farm.
(4) Includes sales to animal feed manufacturers, feed and seed retained on farm of origin or sold farm-to-farm.
(5) Average market returns net of marketing expenses, feed and seed retained on farm of origin or sold farm-to-farm are valued at opportunity cost, assumed to be the ex-farm feed price.
(6) Value of the physical increase in on-farm stocks over the course of the year.

Table A4 Output and utilisation of potatoes, vegetables and fruit, 2010 to 2014[1]

	Unit	2010	2011	2012	2013	2014 (prov)
Potatoes[2]						
Earlies	'000 tonnes	3.4	4.4	4.2	2.8	4.7
Maincrop ware[3]	"	899.7	816.7	607.1	760.9	758.9
Seed[4]	"	322.1	321.9	262.7	296.2	290.9
Stockfeed[5]	"	118.8	107.8	80.1	100.4	100.2
Total potatoes	"	**1,343.8**	**1,250.9**	**954.2**	**1,160.3**	**1,154.7**
Earlies	£ per tonne	321.59	262.52	498.33	413.08	269.81
Maincrop ware	"	177.64	99.61	309.75	145.86	95.79
Seed[4]	"	213.70	224.66	280.96	250.44	259.51
Earlies	£ millions	1.1	1.2	2.1	1.2	1.3
Seed[4]	"	71.4	69.8	71.6	75.3	75.6
Maincrop ware	"	117.6	131.3	129.8	180.3	93.6
Stockfeed[5]	"	0.7	0.9	1.3	1.6	1.8
Stockchange[6]	"	-6.2	-3.4	-40.3	16.9	-2.3
Total value of output	"	**184.7**	**199.9**	**164.5**	**275.2**	**169.9**
Vegetables						
Carrots	'000 tonnes	190.7	144.8	137.2	187.4	231.4
Turnips & swedes	"	75.2	64.4	49.3	62.0	64.6
Brussel sprouts	"	12.2	14.8	11.0	14.4	14.2
Peas	"	30.3	26.6	20.3	28.9	34.4
Other vegetables	"	88.7	77.4	61.9	73.1	83.5
Total vegetables	"	**397.2**	**327.9**	**279.7**	**365.7**	**428.1**
Carrots	£ per tonne	137.29	157.91	177.31	169.77	133.33
Turnips & swedes	"	209.91	239.27	312.49	332.91	183.83
Brussel sprouts	"	820.12	1,047.48	1,086.85	1,243.72	1,085.15
Peas	"	290.30	305.04	331.71	383.24	383.26
Carrots	£ millions	26.2	22.9	24.3	31.8	30.9
Turnips & swedes	"	15.8	15.4	15.4	20.6	11.9
Brussel sprouts	"	10.0	15.5	12.0	17.9	15.4
Peas	"	8.8	8.1	6.7	11.1	13.2
Other vegetables	"	50.9	46.9	43.1	51.3	59.2
Total value of output	"	**111.6**	**108.8**	**101.5**	**132.7**	**130.5**
Fruit						
Raspberries	'000 tonnes	3.0	3.2	2.5	2.7	2.9
Strawberries	"	21.6	21.4	16.9	23.8	25.2
Other fruit	"	5.2	5.5	4.8	7.1	7.4
Total fruit	"	**29.9**	**30.1**	**24.2**	**33.6**	**35.5**
Raspberries	£ per tonne	4,514.60	4,948.60	5,975.83	5,881.50	4,332.70
Strawberries	"	2,881.17	2,688.55	2,894.03	2,774.74	2,697.98
Raspberries	£ millions	13.7	15.7	15.1	16.1	12.7
Strawberries	"	62.3	57.5	48.9	66.0	68.0
Other fruit	"	8.1	8.4	8.2	12.0	11.0
Total value of output	"	**84.1**	**81.6**	**72.2**	**94.2**	**91.7**

(1) Output data are for calendar years and so reflect the influence of two crop years.
(2) Includes all production whether sold off or consumed on the national farm.
(3) Includes farmyard consumption.
(4) Includes seed retained on the farm of origin or sold farm-to-farm. Valued at opportunity cost, assumed to be the ex-farm seed price.
(5) Potatoes used on farm as stockfeed.
(6) Value of the physical increase in on-farm stocks over the course of the year.

Table A5 Output[1] and prices of cattle and sheep, 2010 to 2014

	2010	2011	2012	2013	2014 (prov)
Finished cattle:					
Number ('000 head)	467	460	415	412	411
Weight of meat ('000 tonnes)	166.1	161.7	147.1	144.3	149.1
Average price (£ per kg)	2.80	3.17	3.50	4.00	3.66
Value of output (£m)	465.9	511.8	515.2	576.7	546.1
Cows and bulls:					
Number ('000 head)	57	64	65	63	55
Weight of meat ('000 tonnes)	19.6	22.2	22.7	21.6	19.6
Average price (£ per head)	684.23	850.62	910.07	908.17	840.57
Value of output (£m)	39.0	54.1	59.3	56.9	46.1
Finished calves:					
Number ('000 head)	0.1	0.1	0.1	0.0	0.0
Weight of meat ('000 tonnes)	0.0	0.0	0.0	0.0	0.0
Value of output (£m)	0.0	0.0	0.0	0.0	0.0
Subtract MLC levy	2.0	2.0	2.0	2.0	2.0
Stock change (£m)[2]	-6.4	-22.3	13.7	-41.0	-4.0
Other receipts (£m)[3]	22.0	21.9	20.4	20.7	20.7
Total value of output (£m)	**563.5**	**628.7**	**668.9**	**669.8**	**660.8**
Store cattle:					
Number ('000 head)	17	15	11	14	17
Average price (£ per head)	998.13	1,112.18	1,241.30	1,400.77	1,328.87
Value of output (£m)	21.9	32.3	43.5	45.5	30.7
Store calves:					
Number ('000 head)	11	10	9	9	10
Average price (£ per head)	224.95	280.22	391.13	593.09	367.62
Value of output (£m)	11.9	17.0	25.0	26.3	19.1
Total value of output (£m)	**33.7**	**49.4**	**68.4**	**71.8**	**49.8**
Finished sheep:					
Number ('000 head)	2,220	2,256	2,054	2,171	2,164
Weight of meat ('000 tonnes)	44.6	45.4	41.4	42.9	43.3
Average price (£ per kg)	3.96	4.27	4.19	3.88	4.21
Value of output (£m)	176.7	193.8	173.8	166.2	182.0
Ewes and rams:					
Number ('000 head)	483	499	415	460	460
Weight of meat ('000 tonnes)	14.5	16.5	13.5	13.5	14.3
Average price (£ per head)	64.64	72.85	64.37	53.42	62.82
Value of output (£m)	29.2	34.1	25.0	23.1	27.1
Stock change (£m)[2]	-0.1	-4.1	7.2	-4.4	4.3
Other receipts (£m)	0.0	0.0	0.0	0.0	0.0
Total value of output (£m)	**196.4**	**213.5**	**197.1**	**175.5**	**202.7**
Store sheep:					
Number ('000 head)	225	217	197	208	208
Average price (£ per head)	68.60	71.24	65.73	59.93	64.38
Total value of output (£m)	**14.4**	**14.5**	**12.1**	**11.6**	**12.4**

(1) Output values also takes into account expenses.
(2) Value of the physical increase in on-farm stocks over the course of the year.
(3) Scottish Beef Calf Scheme up to 2012, and Scottish Beef Scheme from 2013.

Table A6 Output and prices of pigs, poultry and livestock products, 2010 to 2014

	2010	2011	2012	2013	2014 (prov)
Finished pigs:					
Number ('000 head)	697	826	767	660	782
Weight of meat ('000 tonnes)	54.7	65.5	59.8	50.8	60.5
Average price (£ per kg)	1.33	1.41	1.47	1.62	1.57
Value of output (£m)	72.4	92.2	87.4	82.3	94.8
Sows and boars:					
Number ('000 head)	11	17	15	14	13
Weight of meat ('000 tonnes)	1.6	2.5	2.2	1.8	2.0
Average price (£ per head)	64.18	63.16	72.57	68.39	58.55
Value of output (£m)	0.7	1.1	1.1	0.9	0.8
Stock change (£m)[1]	0.8	-2.1	-3.2	-2.7	0.4
Total value of output (£m)	**72.1**	**88.9**	**83.2**	**78.6**	**93.8**
Poultry:					
Chickens: Weight of meat ('000 tonnes)	123	125	126	122	115
Other table poultry: Weight of meat ('000 tonnes)	8.5	9.6	10.5	9.4	9.8
Chickens: Average price (p per kg)	74.00	84.00	89.00	97.00	86.00
Value of output (£m)	92.4	106.4	114.3	119.8	100.1
Stock change (£m)[1]	0.8	-1.4	2.8	-2.4	-0.6
Total value of output (£m)	**93.2**	**105.0**	**117.1**	**117.5**	**99.6**
Eggs:					
Packing station throughput – laying cages (million eggs)	386	391	513	556	560
Packing station throughput – free range (million eggs)	488	639	479	477	502
Packing station throughput – other (million eggs)	182	113	51	49	69
Average price – laying cages (p per dozen)	55	56	71	72	66
Average price – free range (p per dozen)	87	86	96	101	97
Total value of output (£m)	**66.9**	**73.4**	**73.5**	**78.4**	**78.4**
Milk (including milk products):					
Production (million litres)	1,293	1,300	1,307	1,347	1,412
Average price (p per litre)	24.55	26.75	27.88	31.26	31.48
Total value of output (£m)	**318.9**	**349.5**	**366.3**	**423.2**	**446.7**
Wool:					
Clipwool (million kg)	6	6	6	6	6
Average receipts (p per kg)	110.83	131.92	82.43	110.10	109.87
Total value of output (£m)	**6.5**	**8.2**	**5.3**	**6.2**	**6.4**

(1) Value of the physical increase in on-farm stocks over the course of the year.

Table A7 Annual average hay and straw prices, 2010 to 2014[1]

£/tonne

	2010	2011	2012	2013	2014 (prov)
Hay	101	105	90	102	89
Oat straw[2]	43	52	51	51	66
Barley straw	63	60	59	66	58

(1) Average of growers' prices paid by a representative sample of merchants throughout Scotland.
(2) Oat straw 2014 prices based on 2013 harvest.

Table A8 Prices and quantities of fertiliser and lime used by Scottish farmers, 2010 to 2014

			2010	2011	2012	2013	2014 (prov)
Price – £ per tonne of nutrient							
Compounds			551	641	722	666	669
Straights	Nitrates	(N)	562	783	890	820	727
	Phosphate	(P_2O_5)	512	788	859	726	599
	Potash	(K_2O)	559	543	573	528	453
	Lime	($CaCO_3$)	39	39	40	41	43
Quantity used – '000 tonnes of nutrient							
	Nitrates	(N)	127	124	125	138	129
	Phosphate	(P_2O_5)	44	42	43	46	44
	Potash	(K_2O)	57	59	56	60	58
	Lime	($CaCO_3$)	549	504	478	528	521

Table A9 Annual average prices of red diesel in UK, 2010 to 2014

p/litre

	2010	2011	2012	2013	2014 (prov)
Red diesel	54.1	68.1	71.0	67.9	58.7

Table A10 Average weekly earnings of regular full-time hired workers, 2010 to 2014

	2010	2011	2012	2013	2014 (prov)
Hours worked: number					
Ordinary hours	39.5	39.2	38.9	39.6	42.5
Seasonal overtime hours	6.1	6.8	6.6	5.8	4.7
Total hours worked	**45.6**	**46.0**	**45.5**	**45.4**	**47.2**
Earnings: £					
Regular cash earnings[1]	329.23	327.62	342.17	341.08	371.52
Seasonal overtime[2]	58.67	70.17	66.11	65.90	53.28
Bonuses	1.26	0.80	1.05	0.14	1.96
Other payments	1.94	1.12	0.64	0.00	0.23
Total cash earnings	**391.10**	**399.71**	**409.97**	**407.13**	**426.99**
Benefits	24.14	20.30	16.36	16.47	16.16
Total earnings	**415.24**	**420.01**	**426.33**	**423.60**	**443.15**

(1) Shepherds' dog allowances are not included in earnings.
(2) Includes cash in lieu which is not shown individually.

Table A11 Total bank advances to agriculture at 31 May 2010 to 2014

£ million

		2010	2011	2012	2013	2014 (prov)
Advances to Agriculture	Current	1,506	1,614	1,670	1,724	1,843
	Real Terms (2014 Prices)	1,600	1,693	1,735	1,763	1,843
Index 2014 =100	Current	81.7	87.6	90.6	93.5	100.0
	Real Terms (2014 Prices)	86.8	91.8	94.1	95.6	100.0

Table A12 (i) Agricultural payments and subsidies[1] included in the aggregate account, 2010 to 2014

£ million

	2010	2011	2012	2013	2014 (prov)
Included in commodity output (Table A1)					
Cattle:					
Scottish Beef Calf Scheme	22.034	21.915	20.400	z	z
Scottish Beef Scheme	z	z	z	20.741	20.690
Other Cattle Schemes	z	z	z	z	z
Cattle total	**22.034**	**21.915**	**20.400**	**20.741**	**20.690**
Included in Other Subsidies (Table A1):					
Single Farm Payment Scheme	479.479	482.951	444.900	445.900	382.400
Less-Favoured Area Support Scheme	63.570	66.564	65.577	65.078	65.500
Land Management Contract Menu Scheme	17.119	6.556	0.154	0.071	0.008
Land Managers Options	0.917	3.540	5.812	6.813	4.961
Rural Stewardship Scheme	7.781	3.964	0.674	0.229	0.126
Rural Priorities	22.206	31.839	32.724	33.046	35.343
Chernobyl Compensation Payments	0.001	z	z	z	z
Environmentally Sensitive Areas Payments	1.486	0.578	0.245	0.031	0.005
Countryside Premium Scheme	0.754	0.233	0.009	0.030	0.001
Organic Aid Scheme	2.077	1.728	0.149	0.074	0.054
Farm Woodland Scheme	0.360	0.356	0.290	0.277	0.280
Farm Woodland Premium Scheme	2.560	2.285	1.790	1.360	0.800
Farmland Premium Scheme	1.190	1.407	1.290	1.180	1.140
EU Dairy Payment	2.575	z	z	z	z
Other[2]	0.233	z	z	6.187	z
Total included in other subsidies	**602.307**	**602.001**	**553.614**	**560.275**	**490.619**
Total other payments and subsidies	**624.341**	**623.916**	**574.014**	**581.016**	**511.309**

(1) Subsidies paid to farmers to support non-agricultural activities or capital improvements excluded from table A12 (i).

(2) Includes Severe Weather grants for 2010, Fallen Stock, Weather Aid and New entrants scheme for 2013.

z not applicable.

Table A12 (ii) Agricultural other payments and subsidies not included in the aggregate account, 2010 to 2014

£ million

	2010	2011	2012	2013	2014 (prov)
Animal Diseases Compensation	0.235	0.136	0.515	0.170	0.543
Other Grants (Mainly Capital)					
Crofting Counties Agricultural Grants Scheme (CCAGS)	1.508	1.404	1.463	1.721	1.811
FEOGA Processing and Marketing Scheme	5.903	6.502	5.354	7.133	6.000
Land Managers Options	0.223	0.238	0.268	0.229	0.173
Rural Priorities	18.319	33.000	32.000	20.847	14.000
Total	**26.188**	**41.280**	**39.600**	**30.100**	**22.527**
Overall total of other payments and subsidies (included in tables A12 (i) and A12 (ii))	**650.528**	**665.196**	**613.614**	**611.116**	**533.835**

Table A13 Estimated balance sheet for Scottish agriculture at current prices, 2010 to 2014[1] [3]

£ million

	2010	2011	2012	2013	2014 (prov)
Assets:					
Fixed:					
Land and buildings[2]	31,720	33,845	32,920	31,265	32,310
Plant and machinery	805	800	840	835	855
Farm vehicles	90	90	95	100	70
Farm cars[3]	65	60	70	70	z
Breeding livestock	875	1,135	990	1,175	1,130
Total fixed assets	**33,555**	**35,935**	**34,915**	**33,445**	**34,365**
Current:					
Trading livestock	745	855	860	1,235	980
Crops and stores	280	280	320	295	260
Financial	1,095	1,070	1,010	1,025	1,115
Total current assets	**2,120**	**2,200**	**2,190**	**2,555**	**2,350**
Total assets	**35,675**	**38,135**	**37,105**	**35,995**	**36,715**
Liabilities:					
Long term:					
Bank loans	690	755	765	800	875
Other	320	320	315	330	365
Total long term	**1,010**	**1,070**	**1,085**	**1,130**	**1,235**
Short term:					
Bank	735	730	700	715	750
Other	575	605	590	600	640
Total short term	**1,305**	**1,335**	**1,290**	**1,315**	**1,390**
Total liabilities	**2,320**	**2,405**	**2,375**	**2,445**	**2,630**
Net worth	**33,355**	**35,730**	**34,735**	**33,550**	**34,090**
Net worth as % of total assets	**93**	**94**	**94**	**93**	**93**

(1) Rounded to the nearest £5 million. Individual items may not sum to total. The value of land and buildings has been estimated from Farm Accounts data, due to a lack of land sales data.

(2) The value of land and buildings does not include the domestic share of dwellings, but does include the business share ie the value of the proportion of the farmhouse used for business purposes.

(3) Included with Farm Vehicles from 2014.

z not applicable.

Table A14 Investment by farmers, 2010 to 2014

£ million

	2010	2011	2012	2013	2014 (prov)
Investment by Farmers[1]	289.5	221.7	262.0	227.0	220.8

(1) Investment by farmers in buildings, plant, machinery and vehicles.

Table A15 Major economic indicators of Scottish agriculture, 2010 to 2014

£ million

	2010	2011	2012	2013	2014 (prov)
Current Prices					
A. Net value added at factor cost[1]	1,065	1,203	1,021	1,225	1,109
B. Returns to all labour[2]	1,012	1,150	966	1,169	1,049
C. TIFF[3]	676	792	630	823	688
Stockchange due to volume in outputs	-49	-26	-54	1	14
Stockchange due to volume in inputs	0	1	0	0	0
Capital formation in livestock	114	126	139	168	175
minus consumption of capital in livestock	126	157	179	167	181
D. Sub total	**-61**	**-56**	**-94**	**2**	**8**
E. Adjusted TIFF[4] (C-D)	**737**	**847**	**724**	**822**	**680**
Depreciation	256	262	271	268	264
Capital grants	26	41	40	30	23
Change in borrowings	446	151	-51	69	91
F. Sub total	**728**	**454**	**260**	**367**	**378**
G. Capital investment[5]	**280**	**209**	**243**	**215**	**235**
H. Cash available (E+F-G)	**1,185**	**1,093**	**741**	**974**	**823**
Annual work units of entrepreneurial labour[6]	27,377	27,120	27,363	26,890	26,731
TIFF per AWU (£)	24,702	29,191	23,017	30,623	25,721
Real terms					
Net value added at factor cost	1,126	1,245	1,039	1,225	1,088
TIFF	715	819	641	823	674
Cash flow	1,253	1,131	754	974	807
TIFF per AWU (£)	26,105	30,207	23,429	30,623	25,217
Indices 2000=100					
Net value added at factor cost	140	155	130	153	136
TIFF	219	251	196	252	206
Cash flow	318	287	192	247	205
TIFF per AWU (£)	246	285	221	289	238

(1) Net Value Added at Factor Cost (formerly known as Net Product) is a measure of the value added by the agricultural industry to all goods and services from outside agriculture after provision has been made for depreciation.

(2) Represents Net Value Added at Factor Cost less Rent and Interest payments and so is equivalent to the total returns to labour inputs.

(3) TIFF (Total Income From Farming) represents the return, to all those with an entrepreneurial interest in agricultural production, for their labour, management skills and own capital invested after providing for depreciation.

(4) After adjustments for input and output stock changes due to volume (including breeding livestock). Adjustments are also made to convert the effect of subsidies included within the calculation of TIFF from an accruals to a cash paid basis.

(5) The value of work carried out by entrepreneurial labour in the creation of new capital is deducted from the total value of capital investment.

(6) The total volume of labour provided by those with an entrepreneurial interest in terms of full-time equivalents.

Table A16 Productivity Indices[1], 2010 to 2014

	2010	2011	2012	2013	2014 (prov)
Final output (gross output less transactions within the agricultural industry)	99	101	91	97	99
Net value added per AWU of all labour	86	91	60	80	86
Final output per unit of all inputs (including fixed capital and labour)	96	97	86	93	96

(1) Indices at basic prices (including direct subsidies on products). Base year 2000=100.

Table B1 FAS summary table 1: 2013-14

	Measure	Specialist Sheep (LFA)	Specialist Cattle (LFA)	Other Cattle and Sheep (LFA)[4]	Cereal	General Cropping	Dairy	Lowland Cattle and Sheep	Mixed	All Types
Average	Output (£)	58,192	128,704	111,673	176,368	223,260	470,628	139,017	219,562	**168,878**
	Input (£)	74,539	159,750	146,339	200,066	230,516	436,132	156,769	245,433	**187,786**
	Susbsidy and payments (£)	37,043	54,771	59,251	40,024	37,097	43,978	41,834	52,661	**46,411**
	Diversified income (£)	3,519	1,079	1,047	6,933	6,375	1,176	99	3,113	**3,031**
	FBI (£)	24,214	24,803	25,634	23,259	36,216	79,651	24,181	29,903	**30,534**
	FBI/FTE (£)[1]	20,011	16,759	15,921	17,891	26,243	38,854	16,677	17,694	**20,631**
	Output:Input ratio	1.32	1.16	1.18	1.12	1.16	1.18	1.15	1.12	**1.16**
	Off farm income (£)[2]	9,436	9,559	9,371	9,872	11,968	4,899	9,876	11,646	**9,887**
	Off farm income/FTE (£)[1] [2]	7,799	6,459	5,820	7,594	8,673	2,390	6,811	6,891	**6,680**
Balance sheets (all tenures)	Net worth (£) closing valuation (CV)	645,249	1,058,320	991,935	1,906,012	1,922,087	1,834,005	1,118,874	1,719,160	**1,331,105**
	Liabilities as % of assets (CV)	7.0	9.8	11.9	7.2	7.0	14.0	10.3	11.0	**9.5**
Hourly income	Average hourly income (£)	10.53	8.82	8.38	9.42	13.81	20.45	8.78	9.31	**10.86**
	Minimum agricultural wage (£)[3]	6.89	6.89	6.89	6.89	6.89	6.89	6.89	6.89	**6.89**
	Average hourly income as % of MAW[3]	152.9	128.0	121.6	136.7	200.4	296.8	127.4	135.2	**157.6**
Quartiles	FBI upper quartile (£)	204,275	62,777	65,763	75,039	95,091	205,306	75,904	79,286	**104,734**
	FBI lower quartile (£)	-14,669	-16,367	-17,943	-22,234	-8,258	-6,122	-13,934	-12,792	**-15,266**
	Output:Input ratio upper quartile	2.9	1.4	1.4	1.3	1.3	1.3	1.3	1.3	**1.5**
	Output:Input ratio lower quartile	0.8	0.9	0.9	0.9	1.0	1.0	0.9	1.0	**0.9**

(1) Full-Time equivalent (FTE) is 1,900 hours.

(2) Off-farm Income is only collected for farmers and their spouse and represents the midpoint of the range in which their income falls.

(3) The minimum agricultural wage (MAW) is the weighted average for 2013 calendar year, with a value of £6.89.

(4) Other cattle and sheep (LFA) excludes farms identified as specialist sheep or specialist cattle.

Table B2 FAS summary table 2: 2009-10 to 2013-14 (2013-14 prices)

	Measure	2009-10	2010-11	2011-12	2012-13	2013-14
Average	Output (£)	135,903	162,749	179,434	174,592	168,878
	Input (£)	150,195	168,500	186,397	193,460	187,786
	Susbsidy and payments (£)	52,443	51,257	49,895	47,349	46,411
	Diversified income (£)	3,607	3,650	3,567	2,643	3,031
	FBI (£)	41,757	49,157	46,500	31,125	30,534
	FBI/FTE (£)(1)	29,201	29,087	31,849	21,030	20,631
	FBI without grants and subsidies	-10,686	-2,100	-3,395	-16,224	-15,877
	Output : Input ratio	1.3	1.3	1.2	1.2	1.2
	Off-farm income (£)(2)	10,325	9,382	8,792	9,631	9,887
	Off-farm income/FTE (£)(1) (2)	7,221	5,551	6,022	6,507	6,680
Hourly income	Average hourly income (£)	15.37	15.31	16.76	11.07	10.86
	Minimum agricultural wage (£)(3)	6.23	6.37	6.55	6.68	6.89
	Average hourly income as % of MAW(3)	246.7	240.3	255.9	165.7	157.6
Quartiles	FBI upper quartile (£)	88,838	107,621	114,010	88,638	104,734
	FBI lower quartile (£)	-7,845	1,257	114	-14,296	-15,266
	Output : Input ratio upper quartile	1.5	1.4	1.5	1.4	1.5
	Output : Input ratio lower quartile	1.0	1.0	1.0	0.9	0.9
Balance sheets (all tenures)	Net worth (£) closing valuation (CV)	920,347	1,241,349	1,294,655	1,335,622	1,331,105
	Liabilities as % of assets (CV)	10.5	9.6	9.4	9.7	9.5

(1) Full-Time equivalent (FTE) is 1,900 hours.
(2) Off farm Income is only collected for farmers and their spouse as the midpoint of the range in which their income falls.
(3) The minimum agricultural wage (MAW) is the weighted average for 2013 calendar year, with a value of £6.89.

Table B3 Average cropping and stocking, output, inputs, and Farm Business Income by type of farm: 2013-14

Type of farm	Specialist Sheep (LFA)	Specialist Cattle (LFA)	Other Cattle and sheep (LFA)[3]	Cereals	General Cropping	Dairy	Lowland Cattle and Sheep	Mixed	All Farm Types
Number of farms in sample	**41**	**133**	**57**	**66**	**55**	**45**	**27**	**71**	**495**
Average size of business (SLR)	3	2	4	2	3	5	3	3	3
Average size of farm (hectares)	738	194	526	168	171	151	133	199	307
Area of cereals (hectares)	0	12	4	120	97	8	18	81	41
Area of potatoes (hectares)	0	0	0	0	16	0	0	1	2
Area of oilseed rape (hectares)	0	0	0	8	8	0	0	4	2
Area of other crops (hectares)	0	0	0	4	7	0	0	2	2
Area of fodder	0	2	2	3	2	8	3	3	3
Area of grass	63	115	126	28	34	123	99	83	82
Number of ewes	540	186	692	16	39	20	208	98	234
Number of suckler cows	6	87	56	6	10	0	53	45	38
Number of dairy cows	0	4	0	0	0	165	1	2	12
Output yield per dairy cow (ltrs)	z	z	z	z	z	*7,021*	z	z	z
Revenue value pence per litre	z	z	z	z	z	*31.16*	z	z	z
Number of other cattle	9	139	75	20	32	209	151	132	89
Headcount of unpaid labour	1.7	2.0	2.0	1.8	2.0	2.5	2.0	2.2	2.0
Number of unpaid workers (FTE)[1]	1.2	1.5	1.6	1.3	1.4	2.1	1.5	1.7	1.5
Average output (£ per farm)									
Total crop output	1,244	10,830	3,411	140,510	172,972	10,821	17,321	91,832	55,303
Total livestock output	31,072	110,436	95,264	15,102	27,423	449,340	114,106	111,983	97,634
Miscellaneous output	25,876	7,438	12,999	20,755	22,865	10,468	7,591	15,747	15,941
Total average output	**58,192**	**128,704**	**111,673**	**176,368**	**223,260**	**470,628**	**139,017**	**219,562**	**168,878**
Subsidy and payments	**37,043**	**54,771**	**59,251**	**40,024**	**37,097**	**43,978**	**41,834**	**52,661**	**46,411**
Average inputs (£ per farm)									
Crop expenses	3,848	21,039	12,650	64,919	67,672	34,595	22,265	54,622	33,722
Livestock expenses	20,507	53,536	52,053	7,641	14,917	210,694	56,182	52,234	48,348
Other input costs	50,184	85,176	81,636	127,506	147,927	190,843	78,323	138,576	105,716
Total average inputs	**74,539**	**159,750**	**146,339**	**200,066**	**230,516**	**436,132**	**156,769**	**245,433**	**187,786**
Diversification margin	**3,519**	**1,079**	**1,047**	**6,933**	**6,375**	**1,176**	**99**	**3,113**	**3,031**
of which: Diversification Output	4,540	4,063	4,421	12,523	17,083	4,593	2,786	5,695	6,981
Diversification Input	1,022	2,984	3,373	5,590	10,708	3,417	2,687	2,582	3,950
FARM BUSINESS INCOME (FBI)	**24,214**	**24,803**	**25,634**	**23,259**	**36,216**	**79,651**	**24,181**	**29,903**	**30,534**
FBI per unpaid labour (FTE)[1]	20,011	16,759	15,921	17,891	26,243	38,854	16,677	17,694	20,631
Output:Input ratio (including subsidies)	**1.32**	**1.16**	**1.18**	**1.12**	**1.16**	**1.18**	**1.15**	**1.12**	**1.16**
Output:Input ratio (excluding subsidies)	**0.83**	**0.81**	**0.77**	**0.92**	**1.00**	**1.08**	**0.89**	**0.91**	**0.92**
Off-farm income (OFI)[2]	9,436	9,559	9,371	9,872	11,968	4,899	9,876	11,646	9,887
OFI per unpaid labour (FTE)[1]	7,799	6,459	5,820	7,594	8,673	2,390	6,811	6,891	6,680

(1) Full-Time equivalent (FTE) is 1,900 hours.

(2) Off-farm Income is only collected for farmers and their spouse and represents the midpoint of the range in which their income falls.

(3) Other cattle and sheep (LFA) excludes farms identified as specialist sheep or specialist cattle.

z: not applicable.

Table B4 Farm business income, outputs and inputs performance bands by quartile: 2013-14

Type of farm	Specialist Sheep (LFA)			Specialist Cattle (LFA)		
Performance band	**Lower 25%**	**Average**	**Upper 25%**	**Lower 25%**	**Average**	**Upper 25%**
Number of farms in sample	**11**	**41**	**11**	**33**	**133**	**34**
Average size of business (SLR)	3	3	3	2	2	3
Average size of farm (hectares)	648	738	958	196	194	208
Area of cereals (hectares)	0	0	0	9	12	14
Area of potatoes (hectares)	0	0	0	0	0	0
Area of oilseed rape (hectares)	0	0	0	0	0	0
Area of other crops (hectares)	0	0	0	0	0	0
Area of fodder	1	0	0	2	2	2
Area of grass	55	63	73	123	115	132
Number of ewes	532	540	462	207	186	164
Number of suckler cows	8	6	6	86	87	89
Number of dairy cows	0	0	0	0	4	6
Number of other cattle	7	9	10	118	139	169
Headcount of unpaid labour	1.7	1.7	1.4	2.2	2.0	1.7
Number of unpaid labour (FTE)(1)	1.4	1.2	1.3	1.7	1.5	1.5
Average output (£ per farm)						
Total crop output	2,236	1,244	1,770	9,264	10,830	12,670
Total livestock output	29,210	31,072	27,996	87,960	110,436	140,579
Miscellaneous output	15,998	25,876	207,712	5,819	7,438	8,649
Total average output	**47,444**	**58,192**	**237,479**	**103,043**	**128,704**	**161,898**
Subsidy and payments	**28,321**	**37,043**	**45,569**	**48,766**	**54,771**	**69,843**
Average inputs (£ per farm)						
Crop expenses	4,510	3,848	3,129	19,105	21,039	20,864
Livestock expenses	26,688	20,507	17,811	55,922	53,536	51,829
Other input costs	61,005	50,184	85,961	92,163	85,176	97,406
Total average inputs	**92,203**	**74,539**	**106,902**	**167,190**	**159,750**	**170,099**
Diversification margin	**1,769**	**3,519**	**28,129**	**-987**	**1,079**	**1,136**
of which: Diversification Output	2,275	4,540	31,471	1,603	4,063	3,675
Diversification Input	506	1,022	3,342	2,589	2,984	2,539
FARM BUSINESS INCOME (FBI)	**-14,669**	**24,214**	**204,275**	**-16,367**	**24,803**	**62,777**
FBI per unpaid labour (FTE)(1)	-10,553	20,011	163,420	-9,461	16,759	43,295
Output:Input ratio (including subsidies)	**0.8**	**1.3**	**2.9**	**0.9**	**1.2**	**1.4**
Output:Input ratio (excluding subsidies)	**0.5**	**0.8**	**2.5**	**0.6**	**0.8**	**1.0**
Off-farm income (OFI)(2)	13,038	9,436	4,200	9,439	9,559	7,664
OFI per unpaid labour (FTE)(1)	9,380	7,799	3,360	5,456	6,459	5,285

(1) Full-Time equivalent (FTE) is 1,900 hours.

(2) Off-farm Income is only collected for farmers and their spouse and represents the midpoint of the range in which their income falls.

(3) Other cattle and sheep (LFA) excludes farms identified as specialist sheep or specialist cattle.

	Other Cattle and Sheep (LFA)[3]			Cereals			General Cropping		
	Lower 25%	Average	Upper 25%	Lower 25%	Average	Upper 25%	Lower 25%	Average	Upper 25%
	15	**57**	**15**	**17**	**66**	**17**	**14**	**55**	**14**
	4	4	5	2	2	2	2	3	3
	289	526	614	177	168	197	123	171	184
	6	4	7	126	120	144	72	97	112
	0	0	0	0	0	1	9	16	20
	0	0	0	11	8	10	5	8	8
	2	0	0	4	4	7	11	7	9
	3	2	5	4	3	2	2	2	0
	128	126	185	26	28	28	24	34	30
	744	692	814	8	16	13	68	39	24
	67	56	53	7	6	4	11	10	3
	0	0	0	0	0	0	0	0	0
	89	75	90	12	20	42	27	32	15
	2.1	2.0	2.5	1.7	1.8	1.8	1.7	2.0	2.6
	1.5	1.6	2.0	1.3	1.3	1.3	1.3	1.4	1.9
	3,854	3,411	7,339	131,692	140,510	189,673	98,372	172,972	225,534
	103,234	95,264	124,724	5,119	15,102	35,193	23,957	27,423	30,850
	5,112	12,999	16,220	25,698	20,755	35,557	9,162	22,865	135,189
	112,200	**111,673**	**148,283**	**162,509**	**176,368**	**260,423**	**131,491**	**223,260**	**391,574**
	59,095	**59,251**	**78,254**	**37,920**	**40,024**	**52,705**	**27,675**	**37,097**	**33,140**
	11,361	12,650	18,231	73,657	64,919	78,663	45,676	67,672	81,408
	72,210	52,053	54,731	3,596	7,641	14,667	15,450	14,917	20,309
	101,840	81,636	91,694	152,016	127,506	154,993	110,983	147,927	232,508
	185,410	**146,339**	**164,656**	**229,270**	**200,066**	**248,323**	**172,109**	**230,516**	**334,225**
	-3,828	**1,047**	**3,883**	**6,606**	**6,933**	**10,234**	**4,686**	**6,375**	**4,603**
	2,112	4,421	7,104	12,742	12,523	15,477	11,963	17,083	7,264
	5,940	3,373	3,222	6,135	5,590	5,243	7,277	10,708	2,661
	-17,943	**25,634**	**65,763**	**-22,234**	**23,259**	**75,039**	**-8,258**	**36,216**	**95,091**
	-11,883	15,921	33,214	-17,236	17,891	60,031	-6,554	26,243	49,016
	0.9	**1.2**	**1.4**	**0.9**	**1.1**	**1.3**	**1.0**	**1.2**	**1.3**
	0.6	**0.8**	**0.9**	**0.7**	**0.9**	**1.1**	**0.8**	**1.0**	**1.2**
	9,767	9,371	26,108	13,126	9,872	5,373	14,717	11,968	6,191
	6,468	5,820	13,186	10,175	7,594	4,298	11,680	8,673	3,191

Table B4 Farm business income, outputs and inputs performance bands by quartile: 2013-14 (continued)

Type of farm	Dairy			Lowland Cattle and Sheep		
Performance band	**Lower 25%**	**Average**	**Upper 25%**	**Lower 25%**	**Average**	**Upper 25%**
Number of farms in sample	**12**	**45**	**12**	**7**	**27**	**7**
Average size of business (SLR)	5	5	7	2	3	3
Average size of farm (hectares)	173	151	202	102	133	168
Area of cereals (hectares)	11	8	12	11	18	39
Area of potatoes (hectares)	0	0	0	0	0	0
Area of oilseed rape (hectares)	0	0	0	0	0	0
Area of other crops (hectares)	0	0	0	0	0	0
Area of fodder	7	8	13	2	3	6
Area of grass	140	123	161	71	99	113
Number of ewes	21	20	11	245	208	227
Number of suckler cows	1	0	0	49	53	32
Number of dairy cows	150	165	240	0	1	0
Output yield per dairy cow (ltrs)	*6,017*	*7,021*	*7,549*	z	z	z
Output value pence per litre	*30.75*	*31.16*	*32.31*	z	z	z
Number of other cattle	184	209	291	89	151	278
Headcount of unpaid labour	2.2	2.5	2.9	1.9	2.0	2.4
Number of unpaid labour (FTE)[1]	1.6	2.1	2.5	1.5	1.5	2.0
Average output (£ per farm)						
Total crop output	11,153	10,821	19,740	8,982	17,321	50,755
Total livestock output	330,424	449,340	712,548	53,492	114,106	162,193
Miscellaneous output	5,387	10,468	8,248	2,296	7,591	67,066
Total average output	**346,964**	**470,628**	**740,535**	**64,770**	**139,017**	**280,013**
Subsidy and payments	**38,503**	**43,978**	**73,435**	**31,849**	**41,834**	**56,864**
Average inputs (£ per farm)						
Crop expenses	28,962	34,595	52,346	14,324	22,265	40,834
Livestock expenses	171,662	210,694	307,665	36,483	56,182	86,498
Other input costs	193,371	190,843	250,496	58,438	78,323	133,527
Total average inputs	**393,995**	**436,132**	**610,507**	**109,245**	**156,769**	**260,859**
Diversification margin	**2,406**	**1,176**	**1,842**	**-1,308**	**99**	**-115**
of which: Diversification Output	6,886	4,593	3,107	4,508	2,786	141
Diversification Input	4,480	3,417	1,265	5,816	2,687	256
FARM BUSINESS INCOME (FBI)	**-6,122**	**79,651**	**205,306**	**-13,934**	**24,181**	**75,904**
FBI per unpaid labour (FTE)[1]	-3,756	38,854	82,785	-9,228	16,677	38,726
Output:Input ratio (including subsidies)	**1.0**	**1.2**	**1.3**	**0.9**	**1.2**	**1.3**
Output:Input ratio (excluding subsidies)	**0.9**	**1.1**	**1.2**	**0.6**	**0.9**	**1.1**
Off-farm income (OFI)[2]	6,293	4,899	3,296	13,211	9,876	1,920
OFI per unpaid labour (FTE)[1]	3,861	2,390	1,329	8,749	6,811	980

(1) Full-Time equivalent (FTE) is 1,900 hours.

(2) Off-farm Income is only collected for farmers and their spouse and represents the midpoint of the range in which their income falls.

z: not applicable.

	Mixed			All Farm Types		
	Lower 25%	Average	Upper 25%	Lower 25%	Average	Upper 25%
	18	**71**	**18**	**124**	**495**	**124**
	3	3	3	3	3	3
	244	199	182	261	307	294
	76	81	96	38	41	49
	2	1	1	2	2	3
	5	4	3	3	2	3
	3	2	0	2	2	2
	4	3	3	3	3	3
	93	83	70	87	82	96
	188	98	51	262	234	243
	48	45	38	40	38	35
	0	2	5	12	12	14
	z	z	z	z	z	z
	z	z	z	z	z	z
	107	132	167	78	89	121
	1.9	2.2	2.5	1.9	2.0	2.0
	1.6	1.7	1.9	1.5	1.5	1.6
	88,142	91,832	109,456	43,540	55,303	71,157
	92,053	111,983	148,764	81,354	97,634	131,887
	16,793	15,747	18,904	11,281	15,941	60,398
	196,989	**219,562**	**277,124**	**136,175**	**168,878**	**263,442**
	54,009	**52,661**	**56,295**	**42,224**	**46,411**	**59,293**
	59,374	54,622	60,412	32,197	33,722	39,862
	49,638	52,234	59,544	49,638	48,348	57,323
	156,530	138,576	138,724	113,192	105,716	129,103
	265,542	**245,433**	**258,681**	**195,026**	**187,786**	**226,288**
	1,753	**3,113**	**4,547**	**1,362**	**3,031**	**8,288**
	4,532	5,695	7,299	5,390	6,981	13,441
	2,780	2,582	2,751	4,029	3,950	5,153
	-12,792	**29,903**	**79,286**	**-15,266**	**30,534**	**104,734**
	-8,200	17,694	41,081	-10,456	20,631	63,862
	1.0	**1.1**	**1.3**	**0.9**	**1.2**	**1.5**
	0.7	**0.9**	**1.1**	**0.7**	**0.9**	**1.2**
	15,652	11,646	5,080	10,992	9,887	6,948
	10,034	6,891	2,632	7,529	6,680	4,237

Table B5 Number of diversified activities and average income in FAS sample (2013-14 prices): 2010-11 to 2013-14

	2010-11		2011-12		2012-13		2013-14	
	Number	Average Income (£)	Number	Average Income (£)	Number	Average Income (£)	Number	Average Income (£)
All	305	5,824	333	5,252	371	3,742	379	3,928
Processing and retailing of farm produce	11	288	7	4,242	7	6,339	8	3,386
Recreation	19	2,165	19	1,525	13	1,514	12	1,904
Renting out buildings – not including tourist accommodation	173	5,912	166	6,527	165	5,805	164	5,946
Tourist Accomodation and Catering	16	-1,266	16	4,250	16	1,731	17	1,186
Mobile Phone Masts	23	6,659	25	6,355	23	7,086	26	7,161
Wind Turbines	28	4,756	29	1,031	37	-6,397	40	-891
Micro Electric Generation	:	:	12	-4,073	38	-3,337	50	-927
Other Miscellaneous receipts	35	12,661	59	6,881	72	7,491	62	5,471

: Micro Electric Generation was not recorded as a separate category until 2011-12.

Table B6 Percentage distribution of income from diversified activities (sample farms with diversified activities): 2010-11 to 2013-14

	2010-11	2011-12	2012-13	2013-14
£0 or less	19.7	22.8	29.9	29.0
up to £2,500	25.6	24.9	25.3	24.8
up to £5,000	19.7	18.9	20.8	19.5
up to £7,500	10.8	12.0	7.0	9.0
up to £10,000	9.8	6.3	4.9	4.7
more than £10,000	14.4	15.0	12.1	12.9
Total number of activities	**305**	**333**	**371**	**379**

Table B7 Diversified activity and incomes (matched sample) at 2013-14 prices: 2010-11 to 2013-14

	2010-11	2011-12	2012-13	2013-14
Total number of farms in matched sample	439	439	439	439
Percentage of farms engaged in diversified activity	47%	47%	49%	50%
Average number of diversified activities on farms with any diversified activity	1.4	1.4	1.5	1.4
Average diversified income of farms with diversified activity	£8,020	£7,566	£6,014	£5,864
Average diversified income of farms with diversified activity (% of FBI)	12%	11%	16%	16%
Average FBI of farms with diversified activity	£66,101	£66,663	£37,314	£37,638
Average FBI of farms without diversified activity	£43,438	£43,536	£31,329	£27,694

Table B8 Percentage distribution of farms according to farm business incomes: 2013-14

Type of farm	Farm Business Income in 2013-14								
	Less than £0	£0 to £4,999	£5,000 to £9,999	£10,000 to £19,999	£20,000 to £29,999	£30,000 to £39,999	£40,000 to £49,999	£50,000 to £99,999	£100,000 and over
Specialist sheep (LFA)	27.9	11.6	14.6	28.3	2.1	4.2	2.1	2.1	7.1
Specialist cattle (LFA)	19.2	6.8	5.4	16.6	15.4	13.2	9.3	9.5	4.6
Other cattle and sheep (LFA)[1]	10.7	13.3	10.3	14.4	13.1	11.4	8.8	12.7	5.3
Cereals	32.3	2.8	5.5	12.9	12.0	8.2	3.7	16.8	5.9
General cropping	16.6	1.5	8.4	16.6	11.5	14.4	1.2	23.8	6.0
Dairy	14.8	2.1	4.2	4.5	2.1	6.3	12.8	23.5	29.6
Lowground cattle and sheep	28.5	2.0	11.0	18.5	11.0	5.5	9.5	9.0	5.0
Mixed	23.2	3.0	1.7	19.9	12.0	10.6	4.3	19.1	6.3
All farm types	**21.7**	**5.9**	**7.6**	**17.8**	**10.4**	**9.9**	**5.9**	**13.4**	**7.4**

(1) Other cattle and sheep (LFA) excludes farms identified as specialist sheep or specialist cattle.

Table B9 Percentage distribution of farms according to farm business incomes per unpaid labour (FTE), relative to the minimum agricultural wage (MAW)[1]: 2013-14

Type of farm	Farm Business Income in 2013-14					
	<£0	≥£0 <MAW	≥MAW <2 x MAW	≥2 x MAW <5 x MAW	≥5 x MAW <10 x MAW	≥10 x MAW
Specialist sheep (LFA)	26.8	39.0	9.8	12.2	9.8	2.4
Specialist cattle (LFA)	18.8	20.3	28.6	26.3	5.3	0.8
Other cattle and sheep (LFA)[2]	12.3	35.1	21.1	29.8	1.8	0.0
Cereals	31.8	13.6	16.7	22.7	10.6	4.6
General cropping	18.2	21.8	14.6	30.9	9.1	5.5
Dairy	13.3	11.1	15.6	37.8	17.8	4.4
Lowground cattle and sheep	25.9	22.2	22.2	25.9	0.0	3.7
Mixed	22.5	16.9	31.0	25.4	4.2	0.0
All farm types	**20.8**	**21.6**	**21.8**	**26.5**	**7.1**	**2.2**

(1) The minimum agricultural wage (MAW) is the weighted average for 2013 calendar year, with a value of £6.89.

(2) Other cattle and sheep (LFA) excludes farms identified as specialist sheep or specialist cattle.

≥ greater than or equal to.

< less than.

Table B10 Sources and levels of non-farming income[1] (2013-14 prices): 2009-10 to 2013-14

Farm type	Sample year	Number of farms in sample (OFI)	FBI per unpaid labour (FTE))	OFI (farmer and spouse)	OFI per unpaid labour (FTE)[2]	% of OFI from employment and/or self-employment	% of OFI from investments, pensions and other
Specialist sheep LFA	2009-10	41	27,346	9,075	7,670	65	35
	2010-11	41	20,822	7,039	5,512	60	40
	2011-12	40	23,079	4,976	4,098	80	20
	2012-13	42	17,733	9,142	7,583	65	35
	2013-14	**41**	**20,011**	**9,436**	**7,769**	**45**	**55**
Specialist cattle (LFA)	2009-10	140	33,657	10,971	7,539	50	50
	2010-11	143	25,635	9,875	6,812	55	45
	2011-12	136	29,325	9,899	6,744	55	45
	2012-13	135	18,114	8,739	5,858	60	40
	2013-14	**133**	**16,759**	**9,559**	**6,486**	**60**	**40**
Other cattle and sheep (LFA)[3]	2009-10	54	31,151	14,350	9,881	75	25
	2010-11	57	27,304	13,487	9,386	80	20
	2011-12	58	24,147	11,055	6,649	75	25
	2012-13	53	12,801	11,936	7,438	75	25
	2013-14	**57**	**15,921**	**9,371**	**5,839**	**70**	**30**
Cereals	2009-10	51	22,273	10,685	7,960	40	60
	2010-11	48	46,132	9,508	7,089	40	60
	2011-12	55	47,226	6,733	5,110	55	45
	2012-13	55	18,112	8,356	5,656	50	50
	2013-14	**66**	**17,891**	**9,872**	**4,462**	**45**	**55**
General cropping	2009-10	63	20,273	8,028	7,999	25	75
	2010-11	61	57,414	6,921	7,222	35	65
	2011-12	63	38,097	9,888	4,960	30	70
	2012-13	61	41,231	12,038	5,987	40	60
	2013-14	**55**	**26,243**	**11,968**	**7,174**	**30**	**70**
Dairy	2009-10	47	42,132	6,692	3,326	65	35
	2010-11	48	40,937	5,816	2,940	70	30
	2011-12	54	44,388	5,002	2,650	75	25
	2012-13	51	23,197	4,744	2,409	70	30
	2013-14	**45**	**38,854**	**4,899**	**2,390**	**70**	**30**
Lowland cattle and sheep	2009-10	29	27,651	11,969	8,049	80	20
	2010-11	31	28,671	11,945	7,866	80	20
	2011-12	29	22,443	11,343	7,415	85	15
	2012-13	29	12,045	8,761	5,858	70	30
	2013-14	**27**	**16,677**	**9,876**	**6,828**	**60**	**40**
Mixed	2009-10	66	25,095	11,301	7,165	65	35
	2010-11	72	35,468	11,365	7,127	60	40
	2011-12	75	32,538	10,876	7,035	60	40
	2012-13	74	20,884	11,518	6,993	65	35
	2013-14	**71**	**17,694**	**11,646**	**6,864**	**65**	**35**
All types	2009-10	493	29,201	10,325	7,199	55	45
	2010-11	503	29,087	9,382	5,537	60	40
	2011-12	512	31,849	8,792	6,020	60	40
	2012-13	502	21,030	9,631	6,515	60	40
	2013-14	**495**	**20,631**	**9,887**	**6,689**	**55**	**45**

(1) Off-farm Income is only collected for farmers and their spouse as the midpoint of the range in which their income falls.

(2) OFI per unpaid labour FTE shows what finance is available to the farmer and their spouse that could supplement FBI per unpaid labour, it is not necessarily used for this purpose.

(3) Other cattle and sheep (LFA) excludes farms identified as specialist sheep or specialist cattle.

Table B11 Average opening and closing balance sheets by tenure and type of farm: 2013-14

Tenure of farm	Type of farm	Specialist sheep (LFA)		Specialist cattle (LFA)		Other Cattle and sheep (LFA)[1]		Cereals	
		Valuation (£/farm)		Valuation (£/farm)		Valuation (£/farm)		Valuation (£/farm)	
		Opening	Closing	Opening	Closing	Opening	Closing	Opening	Closing
Owner-occupied farms	**Sample Size**	**<20**		**>50**		**20-50**		**20-50**	
	Total assets	882,693	922,557	1,307,810	1,333,645	1,701,136	1,719,672	2,447,179	2,494,632
	Total external liabilities	45,835	38,631	118,604	127,103	163,668	181,723	162,880	166,135
	Net worth	**836,858**	**883,926**	**1,189,205**	**1,206,541**	**1,537,469**	**1,537,949**	**2,284,300**	**2,328,497**
	Liabilities as a percentage of assets	5.2	4.2	9.1	9.5	9.6	10.6	6.7	6.7
Tenanted farms	**Sample Size**	**<20**		**20-50**		**<20**		**<20**	
	Total assets	257,085	225,411	419,980	417,832	311,052	305,487	301,306	294,337
	Total external liabilities	17,030	16,112	50,285	52,873	50,572	53,593	55,256	60,480
	Net worth	**240,055**	**209,299**	**369,695**	**364,960**	**260,480**	**251,895**	**246,050**	**233,856**
	Liabilities as a percentage of assets	6.6	7.1	12.0	12.7	16.3	17.5	18.3	20.5
Mixed tenure farms	**Sample Size**	**<20**		**20-50**		**<20**		**20-50**	
	Total assets	849,503	904,718	1,335,762	1,344,737	1,192,552	1,196,443	2,112,145	2,141,328
	Total external liabilities	156,367	162,356	139,608	136,384	197,815	163,676	165,394	173,567
	Net worth	**693,136**	**742,361**	**1,196,154**	**1,208,354**	**994,737**	**1,032,767**	**1,946,751**	**1,967,760**
	Liabilities as a percentage of assets	18.4	17.9	10.5	10.1	16.6	13.7	7.8	8.1
All Tenures	**Sample Size**	**41**		**132**		**57**		**63**	
	Total assets	675,033	693,819	1,155,420	1,173,742	1,118,050	1,125,373	2,018,275	2,053,742
	Total external liabilities	51,895	48,570	109,757	115,422	130,533	133,438	143,559	147,730
	Net worth	**623,137**	**645,249**	**1,045,663**	**1,058,320**	**987,518**	**991,935**	**1,874,717**	**1,906,012**
	Liabilities as a percentage of assets	7.7	7.0	9.5	9.8	11.7	11.9	7.1	7.2

(1) Other cattle and sheep (LFA) excludes farms identified as specialist sheep or specialist cattle.

c cell values have been suppressed due to small sample sizes.

> greater than.

< less than.

	General cropping		Dairy		Lowland cattle and sheep		Mixed		All farm types	
	Valuation (£/farm)		Valuation (£/farm)		Valuation (£/farm)		Valuation (£/farm)		Valuation (£/farm)	
	Opening	Closing	Opening	Closing	Opening	Closing	Opening	Closing	Opening	Closing
	20-50		c		<20		20-50		>50	
	2,324,094	2,379,573	c	c	1,355,194	1,389,196	2,195,314	2,267,146	1,749,136	1,793,635
	147,423	135,175	c	c	159,311	138,472	151,653	214,219	143,236	150,535
	2,176,671	**2,244,398**	**c**	**c**	**1,195,883**	**1,250,724**	**2,043,661**	**2,052,928**	**1,605,900**	**1,643,100**
	6.3	5.7	c	c	11.8	10.0	6.9	9.4	8.2	8.4
	<20		c		<20		<20		>50	
	310,904	310,566	c	c	485,096	470,297	457,045	442,558	359,926	348,654
	56,606	78,746	c	c	49,831	38,274	100,806	83,852	56,526	57,086
	254,298	**231,820**	**c**	**c**	**435,265**	**432,022**	**356,238**	**358,707**	**303,400**	**291,568**
	18.2	25.4	c	c	10.3	8.1	22.1	18.9	15.7	16.4
	<20		c		<20		20-50		>50	
	2,733,180	2,794,892	c	c	1,249,167	1,301,232	1,849,786	1,931,110	1,605,137	1,650,637
	276,581	303,037	c	c	178,287	176,294	306,867	358,495	203,825	212,105
	2,456,599	**2,491,854**	**c**	**c**	**1,070,880**	**1,124,938**	**1,542,918**	**1,572,615**	**1,401,312**	**1,438,532**
	10.1	10.8	c	c	14.3	13.5	16.6	18.6	12.7	12.8
	52		45		26		67		483	
	2,020,181	2,066,649	2,062,375	2,133,543	1,217,933	1,246,726	1,872,875	1,932,316	1,437,653	1,470,591
	146,388	144,562	312,771	299,538	145,390	127,852	164,680	213,157	133,464	139,486
	1,873,794	**1,922,087**	**1,749,604**	**1,834,005**	**1,072,543**	**1,118,874**	**1,708,195**	**1,719,160**	**1,304,189**	**1,331,105**
	7.2	7.0	15.2	14.0	11.9	10.3	8.8	11.0	9.3	9.5

B12 Enterprise performance[1] summary table: 2012-13 and 2013-14

Enterprise type	Enterprise Gross Margin			
	2012-13[2]	2013-14		
	Average	Lower 25%	Average	Upper 25%
	Crop EGM (£ hectare)	**Crop EGM (£ per hectare)**		
Winter wheat	845	397	815	1,220
Winter barley	709	208	454	696
Spring barley	696	314	573	835
Mixed barley	713	398	592	812
Winter oil seed rape	633	250	493	727
Winter oats	851	c	569	c
Spring oats	758	222	488	921
All potatoes	4,990	c	4,221	c
	Cattle EGM (£ head)	**Cattle EGM (£ per head)**		
Dairy cows	862	751	1,108	1,538
Dairy followers	484	-36	326	692
Dairy mixed & dairy beef (combined)	377	139	396	641
Beef: hill herds	161	c	220	c
Beef: upland suckler selling weaning	215	c	350	c
Beef: upland suckler selling yearling stores	264	7	275	552
Beef: lowland suckler/herds	262	40	265	497
Beef: forward stores	147	c	211	c
Beef: mixed	144	-4	218	492
Beef: finishing	154	-68	187	407
	Sheep EGM (£ head)	**Sheep EGM (£ per head)**		
Sheep: extensive/hardhill	14	-15	6	29
Sheep: crossbred ewe production	52	c	36	c
Sheep: finished/store lamb production	33	-9	29	65
Sheep: lowland (non LFA)	26	-42	23	71
Sheep: store lamb finishing (short keep)	c	c	c	c
Sheep: store lamb finishing (long keep)	14	-8	14	29

(1) Performance categories are based on distributions of gross margin results.
(2) At 2013-14 prices.
c cell values have been suppressed due to small sample sizes.

	Overall Enterprise Gross Margin			Output:Input Ratio		
	2012-13			2013-14		
	Lower 25%	Average	Upper 25%	Lower 25%	Average	Upper 25%
	Crop Overall EGM (£)			**Crop**		
	12,092	27,108	32,013	1.7	2.5	3.4
	3,377	12,651	26,394	1.4	1.9	2.4
	12,323	29,492	51,760	1.7	2.4	3.2
	33,808	51,560	57,750	1.9	2.4	3.1
	6,456	12,483	23,999	1.5	1.9	2.3
	c	9,429	c	c	2.4	c
	9,051	12,687	19,221	1.5	2.3	4.4
	c	97,499	c	c	3.4	c
	Cattle Overall EGM (£)			**Cattle**		
	153,363	191,810	229,344	1.7	2.0	2.4
	-3,156	28,803	78,739	1.0	1.4	2.2
	15,433	46,403	77,648	1.3	1.8	2.4
	c	9,527	c	c	1.4	c
	c	27,750	c	c	1.8	c
	472	23,466	49,184	1.0	1.6	2.2
	2,381	16,885	28,476	1.1	1.5	1.9
	c	10,386	c	c	1.9	c
	-204	12,444	17,699	1.0	1.7	2.7
	-7,922	22,434	39,750	0.9	1.4	2.1
	Sheep Overall EGM (£)			**Sheep**		
	-9,909	4,810	24,347	0.6	1.2	2.0
	c	26,618	c	c	1.6	c
	-3,571	15,295	19,116	0.9	1.5	2.0
	-3,609	4,809	18,396	0.6	1.3	2.5
	c	c	c	c	c	c
	-1,744	4,971	8,867	0.5	2.0	4.3

B13 Farm Business Income by Cost Centres: 2012-14

		Cost Centre (£ per Farm)											
		Agriculture		Agri-environment		Diversification		Contracting		Direct Payment		Farm Business (£ per Farm)	
		2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14
Specialist sheep (LFA)	Total Output	49,105	55,264	12,298	13,084	3,356	4,540	4,513	4,326	23,987	22,561	93,259	99,775
	Total Costs	70,200	70,918	130	192	891	1,022	719	3,393	39	36	71,979	75,561
	Income	**-21,095**	**-15,654**	**12,168**	**12,891**	**2,465**	**3,518**	**3,794**	**933**	**23,948**	**22,525**	**21,280**	**24,214**
Specialist cattle (LFA)	Total Output	119,585	124,646	11,403	11,682	3,484	4,063	6,292	4,691	42,125	42,455	182,889	187,538
	Total Costs	149,285	156,630	335	406	2,440	2,984	4,132	2,635	105	78	156,296	162,734
	Income	**-29,700**	**-31,984**	**11,068**	**11,276**	**1,044**	**1,079**	**2,161**	**2,056**	**42,020**	**42,377**	**26,593**	**24,803**
Other cattle and sheep (LFA)[1]	Total Output	101,128	103,955	17,135	18,154	3,385	4,421	4,475	8,616	38,759	40,200	164,881	175,345
	Total Costs	139,224	141,515	410	793	2,684	3,373	2,188	3,819	69	212	144,574	149,712
	Income	**-38,096**	**-37,560**	**16,726**	**17,361**	**701**	**1,048**	**2,287**	**4,797**	**38,690**	**39,988**	**20,307**	**25,634**
Cereals	Total Output	190,213	162,723	2,956	2,600	11,339	12,523	14,888	14,011	41,254	37,057	260,649	228,914
	Total Costs	222,595	190,343	477	221	5,391	5,590	8,714	9,423	94	80	237,271	205,656
	Income	**-32,382**	**-27,619**	**2,479**	**2,379**	**5,948**	**6,933**	**6,174**	**4,588**	**41,159**	**36,977**	**23,378**	**23,258**
General cropping	Total Output	247,306	208,022	3,128	2,315	17,897	17,083	18,270	15,489	36,607	34,531	323,208	277,439
	Total Costs	243,225	220,115	927	288	13,577	10,708	8,958	10,031	51	82	266,738	241,224
	Income	**4,081**	**-12,094**	**2,201**	**2,027**	**4,320**	**6,375**	**9,312**	**5,459**	**36,556**	**34,449**	**56,470**	**36,216**
Dairy	Total Output	393,763	466,430	2,258	2,661	6,134	4,593	2,511	4,318	39,197	41,197	443,862	519,200
	Total Costs	394,210	434,081	59	538	3,355	3,417	964	1,452	18	60	398,607	439,549
	Income	**-448**	**32,348**	**2,199**	**2,123**	**2,779**	**1,176**	**1,547**	**2,866**	**39,179**	**41,137**	**45,255**	**79,651**
Lowland cattle and sheep	Total Output	127,416	138,600	3,374	3,282	2,596	2,786	734	901	37,434	38,068	171,554	183,637
	Total Costs	151,214	156,007	24	169	2,166	2,687	249	392	218	201	153,870	159,456
	Income	**-23,798**	**-17,407**	**3,350**	**3,112**	**430**	**99**	**486**	**509**	**37,216**	**37,868**	**17,684**	**24,181**
Mixed	Total Output	223,323	209,145	5,395	4,218	5,954	5,695	7,840	10,751	48,589	48,110	291,101	277,918
	Total Costs	249,033	238,854	424	157	2,033	2,582	5,776	6,377	88	46	257,354	248,015
	Income	**-25,710**	**-29,709**	**4,971**	**4,061**	**3,921**	**3,113**	**2,064**	**4,374**	**48,501**	**48,064**	**33,748**	**29,903**
All types	Total Output	164,349	161,531	8,197	8,156	6,554	6,981	7,771	7,972	38,367	37,630	225,238	222,270
	Total Costs	185,984	182,509	372	329	3,949	3,950	4,183	4,863	81	86	194,570	191,736
	Income	**-21,635**	**-20,978**	**7,825**	**7,827**	**2,605**	**3,031**	**3,588**	**3,109**	**38,286**	**37,545**	**30,668**	**30,534**

(1) Other cattle and sheep (LFA) excludes farms identified as specialist sheep or specialist cattle.

Table C1 Number of holdings by region, subregion and farm type[1], June 2014

holdings

	Farm type											
	Specialist cereals	General cropping	Specialist horticulture & permanent crops	Specialist pigs	Specialist poultry	Specialist dairy	LFA cattle & sheep	Non-LFA cattle & sheep	Mixed holdings	General cropping; forage	Unclassified	Total
North West:	**261**	**246**	**215**	**96**	**294**	**43**	**7,431**	**112**	**1,233**	**10,193**	**409**	**20,533**
Shetland	c	c	10	c	19	c	1,121	0	110	538	10	1,818
Orkney	41	c	16	c	40	17	709	0	143	960	35	1,984
Eileanan an Iar	c	107	65	18	73	5	2,320	c	246	3,498	80	6,420
Highland	212	130	124	60	162	c	3,281	c	734	5,197	284	10,311
North East:	**1,134**	**206**	**84**	**72**	**149**	**36**	**1,200**	**797**	**1,564**	**3,324**	**292**	**8,858**
Grampian	1,134	206	84	72	149	36	1,200	797	1,564	3,324	292	8,858
South East:	**1,043**	**579**	**177**	**63**	**210**	**60**	**1,318**	**725**	**1,360**	**3,410**	**288**	**9,233**
Tayside	310	399	92	16	73	11	434	241	486	1,503	103	3,668
Fife	216	84	38	14	48	20	54	161	289	553	58	1,535
Lothian	262	51	30	14	40	18	167	133	227	521	56	1,519
Scottish Borders	255	45	17	19	49	11	663	190	358	833	71	2,511
South West:	**256**	**33**	**141**	**66**	**276**	**747**	**4,378**	**653**	**1,341**	**5,383**	**379**	**13,653**
East Central	c	c	6	9	35	26	321	c	183	640	53	1,529
Argyll & Bute	c	c	27	7	34	46	903	c	92	799	60	1,978
Clyde Valley	71	6	54	12	51	135	960	115	332	1,352	124	3,212
Ayrshire	34	16	27	6	61	212	784	159	311	1,139	78	2,827
Dumfries & Galloway	40	5	27	32	95	328	1,410	230	423	1,453	64	4,107
LFA	**474**	**242**	**299**	**167**	**534**	**636**	**14,327**	**0**	**2,751**	**15,861**	**821**	**36,112**
Non-LFA	**2,220**	**822**	**318**	**130**	**395**	**250**	**0**	**2,287**	**2,747**	**6,449**	**547**	**16,165**
Scotland	**2,694**	**1,064**	**617**	**297**	**929**	**886**	**14,327**	**2,287**	**5,498**	**22,310**	**1,368**	**52,277**

(1) Since the 2014 publication, ERSA has used a new farm typology. Comparisons with previous years should be made with caution. Further details are available at: www.gov.scot/Publications/2013/06/5219/12.

c data suppressed to prevent disclosure of individual holdings.

Table C2 Crops, grass and rough grazings for each United Kingdom country, June 2014

	Scotland	England	Wales	Northern Ireland	United Kingdom
Number of holdings[1]	**52,277**	**102,836**	**35,253**	**24,228**	**214,594**
Crops, fallow and set-aside:	*hectares*	*hectares*	*hectares*	*hectares*	*hectares*
Wheat	109,023	1,796,730	21,486	8,498	1,935,737
Triticale	519	9,811	:	40	:
Barley: Winter	52,507	363,227	6,580	6,709	429,023
Spring	274,377	345,476	14,103	16,846	650,802
Total	326,884	708,703	20,683	23,555	1,079,826
Oats (including mixed grain)[2]	25,697	119,067	6,133	2,086	152,983
Rape for oilseed (including flax[3] and linseed)	37,140	646,118	5,433	494	689,185
Potatoes	28,511	105,056	2,775	4,188	140,529
Peas for combining	616	30,710	:	:	:
Beans for combining[4]	2,765	103,482	617	:	:
Maize	1,319	171,165	9,372	1,598	183,453
Turnips, swedes and beet for stockfeeding	4,561	:	:	549	:
Other crops for stockfeeding[5]	12,694	41,245	15,185	4,668	190,085
Vegetables for human consumption	16,262	97,921	617	1,332	116,132
Orchard and soft fruit	757	29,783	733	1,533	32,806
Bulbs, other flowers and nursery stock	1,276	10,287	314	146	12,023
All other crops	9,085	139,454	1,949	1,099	151,587
Fallow land	11,910	146,305	939	1,015	160,169
Total crops and fallow	**589,018**	**4,155,838**	**86,698**	**50,800**	**4,882,384**
Grass:					
Under 5 years	425,742	671,381	152,571	146,199	1,395,893
5 years and over	882,387	3,252,151	1,047,916	641,833	5,824,287
Total grass	**1,308,129**	**3,923,532**	**1,200,487**	**788,032**	**7,220,181**
Total crops, fallow and grass	**1,897,147**	**8,079,370**	**1,287,215**	**838,832**	**12,102,565**
Rough grazing:					
Sole right grazing	3,056,855	476,211	257,055	140,147	3,930,268
Common grazing[6]	584,263	398,947	180,305	35,631	1,199,146
Total rough grazing	**3,641,118**	**875,158**	**437,360**	**175,778**	**5,129,414**
Total crops, fallow, grass and rough grazing (UAA)[7]	**5,538,265**	**8,954,528**	**1,724,575**	**1,014,610**	**17,231,978**
Woodland	479,359	331,316	75,703	11,091	897,469
Other land	162,607	145,976	11,391	6,734	326,708
Total agricultural area[8]	**6,180,231**	**9,431,820**	**1,811,669**	**1,032,435**	**18,456,155**
Total land area[9]	**7,880,998**	**13,045,939**	**2,078,224**	**1,412,972**	**24,418,133**
% land agricultural	**78%**	**72%**	**87%**	**73%**	**76%**

(1) Refers only to holdings actively engaged in agriculture but excludes sheep stock clubs and landless cattle keepers in Scotland and non-commercial holdings in England.

(2) Includes rye for England and Wales and triticale for Wales.

(3) Flax not collected for Scotland. Figure for Scotland includes linseed.

(4) Wales figures includes peas for combining

(5) Includes lupins. Wales figure included turnips, swede and beet for stock feeding

(6) Inclusion of common grazing land brings total agricultural area in Scotland and in Northern Ireland to a higher level than that published in the June agricultural census publication.

(7) Utilised agricultural area (UAA) excludes woodland and other land such as yards and derelict land etc.

(8) Data source: UK Standard Area Measurements (SAM) as at December 2014, published by Office for National Statistics.

: Information not available.

Table C3 Agricultural area by Less Favoured Area Category, June 2014

	LFA[1]	Non-LFA	Total
Number of holdings	**36,112**	**16,165**	**52,277**
Crops, fallow and set-aside:	*hectares*	*hectares*	*hectares*
Wheat	8,871	100,152	109,023
Triticale	187	332	519
Barley: Winter	7,090	45,417	52,507
Spring	72,002	202,375	274,377
Total	79,092	247,792	326,884
Oats (including mixed grain)	6,668	19,029	25,697
Rape for oilseed (including linseed)	2,207	34,934	37,140
Potatoes	2,267	26,243	28,511
Peas for combining	36	580	616
Beans for combining	236	2,529	2,765
Turnips, swedes and beet for stockfeeding	2,340	2,220	4,561
Other crops for stockfeeding[2]	10,248	3,765	14,013
Vegetables for human consumption	890	15,373	16,262
Orchard and soft fruit	67	690	757
Bulbs, flowers and nursery stock	288	988	1,276
All other crops	3,702	5,383	9,085
Fallow land: 5 years or less	2,127	5,320	7,447
more than 5 years	3,146	1,316	4,463
Total crops and fallow	**122,372**	**466,646**	**589,018**
Grass:			
Under 5 years	276,456	149,286	425,742
5 years and over	759,501	122,886	882,387
Total grass	**1,035,957**	**272,173**	**1,308,129**
Total crops, fallow and grass	**1,158,329**	**738,818**	**1,897,147**
Rough grazing:			
Sole right grazing	3,023,066	33,789	3,056,855
Common grazing	584,263	0	584,263
Total rough grazing	**3,607,329**	**33,789**	**3,641,118**
Total crops, fallow, grass and rough grazing (UAA)[3]	**4,765,658**	**772,607**	**5,538,265**
Woodland	415,155	64,204	479,359
Other land	147,335	15,271	162,607
Total agricultural area	**5,328,149**	**852,082**	**6,180,231**

(1) A holding is classified as LFA if 50% or more of its land is assessed as being disadvantaged or severely disadvantaged for subsidy purposes.
(2) Includes lupins and maize.
(3) Utilised agricultural area (UAA) excludes woodland and other land such as yards and derelict land etc.

Table C4 Number of holdings with crops and grass and area of crops and grass by region and sub-region, June 2014

	North West					North East		South East		
	Total	Shetland	Orkney	Eileanan an Iar	Highland	Total	Grampian	Total	Tayside	Fife
Crops and fallow:	*holdings*	*holdings*	*holdings*	*holdings*	*holdings*	*holdings*	*holdings*	*holdings*	*holdings*	*holdings*
Wheat	110	0	c	c	c	544	544	1,655	619	347
Barley: Winter	80	0	7	0	73	635	635	956	313	191
Spring	1,094	c	431	c	640	2,848	2,848	2,501	1,236	440
Total	1,108	c	436	c	649	2,936	2,936	2,729	1,277	483
Oats, triticale and mixed grain	391	21	35	135	200	318	318	641	225	139
Rape for oilseed and linseed	82	c	0	c	c	389	389	734	301	101
Potatoes	819	64	103	290	362	513	513	1,238	831	191
Peas and beans for combining	14	0	0	6	8	14	14	169	48	35
Stockfeeding crops	716	88	156	64	408	779	779	608	241	74
Vegetables for human consumption	431	36	38	136	221	292	292	783	453	155
Orchard and soft fruit	194	c	c	47	140	88	88	149	80	22
Bulbs, flowers and nursery stock	43	c	c	11	24	39	39	83	55	9
All other crops	695	45	164	97	389	707	707	988	385	156
Fallow land: 5 years or less	302	5	13	55	229	859	859	850	387	196
more than 5 years	258	6	31	87	134	156	156	174	81	36
Total crops and fallow	**3,204**	**204**	**639**	**690**	**1,671**	**3,722**	**3,722**	**3,736**	**1,661**	**645**
Grass and rough grazing:										
Grass under 5 years old	4,793	247	835	1,135	2,576	4,473	4,473	4,001	1,655	649
Grass 5 years old and over	13,903	1,433	1,456	4,250	6,764	5,984	5,984	6,717	2,533	1,100
Sole right grazing	10,798	1,272	1,000	2,858	5,668	3,399	3,399	3,076	1,232	476
Common grazing	1,051	162	21	318	550	6	6	0	0	0
Total grass and rough grazing	**20,908**	**1,965**	**1,941**	**6,610**	**10,392**	**8,244**	**8,244**	**8,403**	**3,281**	**1,390**
Utilised Agricultural Area (UAA)[3]	**21,266**	**1,975**	**1,979**	**6,705**	**10,607**	**8,635**	**8,635**	**8,919**	**3,565**	**1,467**
Woodland	2,438	48	53	167	2,170	2,603	2,603	3,191	1,057	443
Other land	6,583	800	814	1,280	3,689	4,001	4,001	4,304	1,690	674
Total agricultural area	**21,569**	**1,980**	**2,005**	**6,734**	**10,850**	**8,861**	**8,861**	**9,230**	**3,668**	**1,534**
Crops and fallow:	*hectares*	*hectares*	*hectares*	*hectares*	*hectares*	*hectares*	*hectares*	*hectares*	*hectares*	*hectares*
Wheat	3,547	0	c	c	c	16,744	16,744	80,631	24,504	15,681
Barley: Winter	1,549	0	26	0	1,523	20,137	20,137	25,906	7,277	4,793
Spring	27,592	c	4,333	c	23,173	113,346	113,346	105,049	54,835	17,684
Total	29,140	c	4,359	c	24,696	133,483	133,483	130,954	62,112	22,477
Oats, triticale and mixed grain	2,567	18	163	278	2,108	4,679	4,679	15,400	4,811	3,923
Rape for oilseed and linseed	1,985	c	0	c	c	11,946	11,946	22,525	7,671	2,793
Potatoes	1,585	21	30	32	1,503	5,675	5,675	20,568	13,834	2,976
Peas and beans for combining	118	0	0	0	118	134	134	2,767	664	444
Stockfeeding crops	2,466	97	669	50	1,651	4,408	4,408	5,662	1,791	574
Vegetables for human consumption	507	34	11	13	448	2,127	2,127	13,435	7,973	2,449
Orchard and soft fruit	35	c	c	3	32	41	41	635	557	50
Bulbs, flowers and nursery stock	59	c	c	1	56	397	397	705	650	9
All other crops	762	16	200	16	530	2,144	2,144	4,689	2,493	683
Fallow land: 5 years or less	840	7	44	74	715	2,424	2,424	3,235	1,415	769
more than 5 years	2,575	11	235	180	2,149	611	611	888	375	131
Total crops and fallow	**46,186**	**287**	**5,713**	**650**	**39,536**	**184,810**	**184,810**	**302,093**	**128,849**	**52,958**
Grass and rough grazing:										
Grass under 5 years old	58,142	899	16,858	1,318	39,067	125,760	125,760	106,684	35,454	13,827
Grass 5 years old and over	182,239	26,462	32,821	23,455	99,501	71,230	71,230	189,975	62,836	17,430
Sole right grazing	1,535,015	53,915	34,194	58,298	1,388,608	214,035	214,035	536,343	357,796	4,399
Common grazing[2]	568,957	66,629	2,294	216,162	283,872	5,028	5,028	0	0	0
Total grass and rough grazing	**2,344,352**	**147,904**	**86,167**	**299,233**	**1,811,048**	**416,053**	**416,053**	**833,002**	**456,086**	**35,656**
Utilised Agricultural Area (UAA)[3]	**2,390,538**	**148,191**	**91,880**	**299,883**	**1,850,585**	**600,864**	**600,864**	**1,135,095**	**584,935**	**88,614**
Woodland	173,878	34	60	1,004	172,780	70,423	70,423	94,030	44,774	5,759
Other land	81,959	1,170	914	1,412	78,463	17,776	17,776	18,219	9,497	1,787
Total agricultural area	**2,646,375**	**149,395**	**92,854**	**302,299**	**2,101,827**	**689,062**	**689,062**	**1,247,343**	**639,205**	**96,159**

(1) Includes lupins and maize.
(2) Inclusion of common grazing land brings total agricultural area in Scotland to a higher level than that published in the June agricultural census.
(3) Utilised agricultural area excludes woodland and other land such as yards and derelict land etc.
c data suppressed to prevent disclosure of individual holdings.

South East		South West							
Lothian	Scottish Borders	Total	East Central	Argyll & Bute	Clyde Valley	Ayrshire	Dumfries & Galloway	Scotland	
holdings	*holdings*	*holdings*	*holdings*	*holdings*	*holdings*	*holdings*	*holdings*	*holdings*	**Crops and fallow:**
304	385	403	64	9	66	84	180	2,712	Wheat
174	278	307	c	c	58	66	142	1,978	Barley: Winter
358	467	1,327	178	91	296	305	457	7,770	Spring
403	566	1,408	189	91	318	320	490	8,181	Total
62	215	258	105	6	39	21	87	1,608	Oats, triticale and mixed grain
133	199	30	16	0	c	c	8	1,235	Rape for oilseed and linseed
98	118	116	9	18	20	35	34	2,686	Potatoes
27	59	25	15	0	c	c	c	222	Peas and beans for combining
65	228	620	41	55	114	105	305	2,723	Stockfeeding crops
76	99	133	12	34	26	32	29	1,639	Vegetables for human consumption
18	29	97	6	18	37	13	23	528	Orchard and soft fruit
13	6	40	c	c	9	8	c	205	Bulbs, flowers and nursery stock
149	298	479	64	48	105	94	168	2,869	All other crops
139	128	165	38	10	41	29	47	2,176	Fallow land: 5 years or less
27	30	115	14	14	31	32	24	703	more than 5 years
571	**859**	**2,531**	**324**	**220**	**549**	**527**	**911**	**13,193**	**Total crops and fallow**
									Grass and rough grazing:
607	1,090	4,456	536	394	c	c	1,655	17,723	Grass under 5 years old
1,043	2,041	10,686	1,156	1,421	2,488	2,233	3,388	37,290	Grass 5 years old and over
447	921	5,611	503	1,329	1,142	978	1,659	22,884	Sole right grazing
0	0	68	0	59	c	c	0	1,125	Common grazing
1,359	**2,373**	**13,135**	**1,437**	**1,961**	**3,031**	**2,709**	**3,997**	**50,690**	**Total grass and rough grazing**
1,451	**2,436**	**13,341**	**1,471**	**1,985**	**3,088**	**2,762**	**4,035**	**52,161**	**Utilised Agricultural Area (UAA)[3]**
517	1,174	4,041	500	580	893	757	1,311	12,273	Woodland
655	1,285	6,460	701	1,043	1,381	1,269	2,066	21,348	Other land
1,518	**2,510**	**13,714**	**1,528**	**2,037**	**3,210**	**2,833**	**4,106**	**53,374**	**Total agricultural area**
hectares	*hectares*	*hectares*	*hectares*	*hectares*	*hectares*	*hectares*	*hectares*	*hectares*	**Crops and fallow:**
17,681	22,765	8,102	2,289	83	1,067	1,229	3,434	109,023	Wheat
5,133	8,702	4,916	c	c	785	784	2,573	52,507	Barley: Winter
14,497	18,033	28,391	5,825	1,620	6,069	5,587	9,290	274,377	Spring
19,630	26,735	33,307	6,576	1,644	6,854	6,371	11,863	326,884	Total
1,216	5,449	3,571	1,849	24	407	125	1,166	26,216	Oats, triticale and mixed grain
4,781	7,280	685	372	0	c	c	228	37,140	Rape for oilseed and linseed
1,593	2,165	683	37	9	65	338	234	28,511	Potatoes
451	1,208	362	178	0	c	c	c	3,381	Peas and beans for combining
792	2,505	6,037	300	377	1,008	920	3,431	18,574	Stockfeeding crops
1,228	1,786	194	46	7	69	58	14	16,262	Vegetables for human consumption
15	12	46	2	3	29	2	10	757	Orchard and soft fruit
44	2	114	c	c	10	8	c	1,276	Bulbs, flowers and nursery stock
436	1,078	1,490	271	54	473	194	496	9,085	All other crops
515	536	948	193	80	281	250	146	7,447	Fallow land: 5 years or less
259	123	390	65	26	92	166	41	4,463	more than 5 years
48,641	**71,645**	**55,930**	**12,179**	**2,312**	**10,462**	**9,717**	**21,260**	**589,018**	**Total crops and fallow**
									Grass and rough grazing:
13,055	44,348	135,156	11,936	10,282	c	c	66,279	425,742	Grass under 5 years old
25,348	84,361	438,944	38,546	56,520	83,401	95,013	165,464	882,387	Grass 5 years old and over
31,223	142,926	771,461	106,745	342,571	76,545	87,341	158,261	3,056,855	Sole right grazing
0	0	10,278	0	8,940	c	c	0	584,263	Common grazing[2]
69,626	**271,634**	**1,355,840**	**157,227**	**418,312**	**182,523**	**207,775**	**390,003**	**4,949,247**	**Total grass and rough grazing**
118,266	**343,280**	**1,411,769**	**169,405**	**420,624**	**192,985**	**217,492**	**411,263**	**5,538,265**	**Utilised Agricultural Area (UAA)[3]**
10,690	32,808	141,029	19,533	49,219	17,405	19,336	35,535	479,359	Woodland
2,517	4,418	44,653	3,418	19,313	5,308	6,343	10,272	162,607	Other land
131,473	**380,506**	**1,597,451**	**192,356**	**489,155**	**215,698**	**243,171**	**457,070**	**6,180,231**	**Total agricultural area**

Table C5 Number of holdings and area by region, sub-region and size of holding, June 2014[1]

	0-<2 hectares	2-<5 hectares	5-<10 hectares	10-<20 hectares	20-<50 hectares	50-<100 hectares	100-<200 hectares	200 + hectares	Total
	holdings	*holdings*	*holdings*	*holdings*	*holdings*	*holdings*	*holdings*	*holdings*	*holdings*
North West	**5,663**	**4,929**	**2,991**	**2,354**	**1,919**	**984**	**684**	**1,009**	**20,533**
Shetland	174	278	330	314	361	170	115	76	1,818
Orkney	407	359	220	256	326	215	120	81	1,984
Eileanan an Iar	2,497	1,834	1,042	699	211	72	21	44	6,420
Highland	2,585	2,458	1,399	1,085	1,021	527	428	808	10,311
North East	**1,446**	**1,849**	**952**	**775**	**1,223**	**1,124**	**927**	**562**	**8,858**
Grampian	1,446	1,849	952	775	1,223	1,124	927	562	8,858
South East	**1,611**	**1,508**	**916**	**684**	**961**	**1,001**	**1,138**	**1,414**	**9,233**
Tayside	621	560	326	247	438	477	472	527	3,668
Fife	367	265	133	101	142	188	213	126	1,535
Lothian	247	318	178	114	154	156	175	177	1,519
Scottish Borders	376	365	279	222	227	180	278	584	2,511
South West	**1,868**	**2,147**	**1,437**	**1,280**	**1,900**	**1,917**	**1,592**	**1,512**	**13,653**
East Central	206	250	169	159	228	198	161	158	1,529
Argyll & Bute	238	277	209	200	248	238	175	393	1,978
Clyde Valley	421	581	362	336	508	509	292	203	3,212
Ayrshire	331	482	300	278	432	446	346	212	2,827
Dumfries & Galloway	672	557	397	307	484	526	618	546	4,107
Scotland	**10,588**	**10,433**	**6,296**	**5,093**	**6,003**	**5,026**	**4,341**	**4,497**	**52,277**
	hectares	*hectares*	*hectares*	*hectares*	*hectares*	*hectares*	*hectares*	*hectares*	*hectares*
North West	**6,688**	**15,734**	**21,359**	**33,341**	**61,198**	**69,200**	**95,921**	**1,773,977**	**2,077,418**
Shetland	193	955	2,446	4,450	11,922	11,807	15,875	35,119	82,766
Orkney	418	1,186	1,575	3,706	10,585	15,258	16,534	41,298	90,560
Eileanan an Iar	2,988	5,632	7,460	9,661	6,143	4,824	3,050	46,379	86,137
Highland	3,089	7,961	9,879	15,524	32,549	37,310	60,462	1,651,182	1,817,955
North East	**1,670**	**5,904**	**6,792**	**11,292**	**40,773**	**81,495**	**129,461**	**406,647**	**684,034**
Grampian	1,670	5,904	6,792	11,292	40,773	81,495	129,461	406,647	684,034
South East	**1,745**	**4,878**	**6,468**	**9,787**	**31,816**	**73,087**	**164,831**	**954,731**	**1,247,343**
Tayside	680	1,816	2,293	3,617	14,597	34,812	66,756	514,635	639,205
Fife	383	846	939	1,454	4,699	13,766	30,243	43,829	96,159
Lothian	276	1,026	1,274	1,620	5,093	11,360	25,926	84,897	131,473
Scottish Borders	406	1,190	1,961	3,096	7,426	13,149	41,906	311,370	380,506
South West	**1,955**	**7,009**	**10,255**	**18,480**	**63,065**	**139,182**	**223,712**	**1,123,514**	**1,587,173**
East Central	221	790	1,215	2,331	7,605	14,267	22,348	143,579	192,356
Argyll & Bute	253	896	1,510	2,856	8,021	17,071	25,344	424,264	480,216
Clyde Valley	474	1,918	2,586	4,883	16,678	36,633	40,339	112,030	215,540
Ayrshire	353	1,586	2,113	4,023	14,704	32,150	48,118	138,946	241,991
Dumfries & Galloway	654	1,819	2,831	4,387	16,057	39,062	87,563	304,697	457,070
Scotland	**12,058**	**33,525**	**44,874**	**72,900**	**196,853**	**362,963**	**613,926**	**4,258,870**	**5,595,968**

(1) This table includes the area of farm woodlands and other farm land but excludes the area of common grazings.

Table C6 Number of holdings with crops and grass and area of crops and grass by region and size group, June 2014

Crops and grass size group Hectares	North West		North East		South East		South West		Scotland	
	Holdings	Hectares	Holdings	Hectares	Holdings	Hectares	Holdings	Hectares	Holdings	Hectares
Under 2	4,501	4,917	1,315	1,516	1,365	1,496	1,494	1,541	8,675	9,470
2-<5	3,703	11,882	1,499	4,804	1,231	4,002	1,634	5,347	8,067	26,035
5-<10	2,273	16,190	815	5,786	732	5,162	1,170	8,440	4,990	35,577
10-<20	1,750	24,789	686	9,979	550	7,965	1,104	16,011	4,090	58,743
20-<50	1,501	46,825	1,169	39,073	947	31,701	1,866	62,744	5,483	180,344
50-<100	774	54,735	1,098	79,267	1,054	76,713	1,958	142,068	4,884	352,782
100-<200	428	59,112	878	121,280	1,238	178,194	1,514	208,526	4,058	567,111
200 & over	218	68,116	371	120,096	869	293,518	564	185,354	2,022	667,084
Total	**15,148**	**286,566**	**7,831**	**381,800**	**7,986**	**598,751**	**11,304**	**630,030**	**42,269**	**1,897,147**

Table C7 Number of holdings by size group and farm type, June 2014

holdings

Size group Hectares	Farm type											
	Specialist cereals	General cropping	Specialist horticulture & permanent crops	Specialist pigs	Specialist poultry	Specialist dairy	LFA cattle & sheep	Non-LFA cattle & sheep	Mixed holdings	General cropping; forage	Unclassified	Total
Under 10	417	215	469	224	804	15	4,579	1,126	3,439	15,090	939	27,317
10-<20	249	36	35	9	50	5	1,726	261	357	2,244	121	5,093
20-<50	577	122	38	16	28	56	2,098	355	375	2,219	119	6,003
50-<100	604	214	22	18	22	281	1,829	288	443	1,224	81	5,026
100-<200	539	287	28	12	15	367	1,658	194	487	710	44	4,341
200 & over	308	190	25	18	10	162	2,437	63	397	823	64	4,497
Total	**2,694**	**1,064**	**617**	**297**	**929**	**886**	**14,327**	**2,287**	**5,498**	**22,310**	**1,368**	**52,277**

Note: Since the 2014 publication, ERSA has used a new farm typology. Comparisons with previous years should be made with caution. Further details are available at: www.gov.scot/Publications/2013/06/5219/12

Table C8 Number of livestock for each United Kingdom country, June 2014

Number

	Scotland	England	Wales	Northern Ireland	United Kingdom
Cattle:					
Dairy Cows[1]	169,716	1,142,822	234,305	294,192	1,841,035
Other Female Dairy Cattle	104,570	563,211	122,532	156,600	946,913
Beef Cows[2]	436,526	710,282	167,799	254,870	1,569,477
Other Female Beef Cattle	276,743	638,428	129,523	198,424	1,243,118
Male Cattle	279,165	791,072	143,601	221,438	1,435,276
Calves	526,636	1,527,908	305,008	441,771	2,801,323
Total cattle[3]	**1,793,356**	**5,373,723**	**1,102,768**	**1,567,295**	**9,837,142**
Sheep:					
Ewes for breeding	2,604,185	6,052,962	4,063,568	794,068	13,514,783
Rams for service	86,807	184,807	119,354	26,467	417,435
Other sheep one year old and over for breeding	631,185	1,061,677	701,941	116,527	2,511,330
Others[4]	99,935	153,932	93,972	15,942	363,781
Lambs	3,270,509	7,935,606	4,760,036	969,866	16,936,017
Total sheep	**6,692,621**	**15,388,984**	**9,738,871**	**1,922,870**	**33,743,346**
Pigs:					
Female breeding herd: Total	30,228	329,379	3,582	42,826	406,015
Gilts 50kg and over for breeding	5,007	69,832	492	4,983	80,314
Boars for service	923	12,122	342	863	14,250
Barren Sows for fattening	610	:	237	570	:
Other pigs: 20kg and over[5]	190,926	2,513,277	18,507	:	:
Under 20kg	88,604	1,029,044	5,210	:	:
Total	279,530	3,542,321	23,717	467,833	4,313,401
Total pigs	**316,298**	**3,953,654**	**28,370**	**517,075**	**4,815,397**
Poultry:					
Fowls in laying flock: Hens in 1st laying season	3,779,037	:	:	:	:
Moulted hens	45,284	:	:	:	:
Total	3,824,321	:	1,882,316	3,044,622	:
Pullets being reared for laying	1,885,032	:	218,608	916,282	:
Total fowls for laying	5,709,353	25,374,380	2,100,924	3,960,904	37,145,561
Fowls for breeding	1,112,122	7,297,476	434,867	2,413,662	11,258,127
Total laying and breeding fowls	6,821,475	32,671,856	2,535,791	6,374,566	48,403,688
Broilers/other table fowls	7,804,746	82,693,074	6,262,114	13,614,200	110,374,134
Other poultry[6]	115,875	10,179,047	199,295	412,362	10,906,579
Total poultry	**14,742,096**	**125,543,977**	**8,997,200**	**20,401,128**	**169,684,401**
Goats and kids	**4,491**	**81,678**	**10,692**	**3,220**	**100,081**
Deer	**7,007**	**21,341**	**1,013**	**2,599**	**31,960**
Horses:					
Horses used in agriculture or horticulture	950	:	:	:	:
All other horses and ponies	36,043	:	:	:	:
Total horses	**36,993**	**205,245**	**50,052**	**11,087**	**303,377**
Camelids[7]:					
Alpacas	1,306	7,583	:	:	:
Llamas	393	1,163	:	:	:
Other camelids	93	:	:	:	:
Total camelids	**1,792**	**:**	**:**	**:**	**:**
Beehives	**4,421**	**:**	**:**	**:**	**:**
Other livestock	**427**	**6,238**	**:**	**:**	**:**

(1) Female dairy cattle aged 2 years old and over with offspring.

(2) Female beef cattle aged 2 years old and over with offspring.

(3) In Scotland, England and Wales data is obtained from the Cattle Tracing System and in Northern Ireland data from the Animal and Public Health Information System is used.

(4) Includes draft and cast ewes, and wethers in England and Wales.

(5) Includes barren sows for fattening in England.

(6) Includes turkeys, ducks, geese and guinea fowl. Includes ostriches in England and Wales.

(7) Scotland figure includes estimate for holdings that have not returned a census form since camelid data was first collected in 2010. Camelid figures are not compatible with previous editions of ERSA.

: Information not available.

Table C9 Number of livestock by Less Favoured Area[1] category, June 2014

Number

	LFA[1]	Non-LFA	Total
Cattle:			
Dairy Cows[2]	116,030	53,686	169,716
Other Female Dairy Cattle	71,449	33,121	104,570
Beef Cows[3]	349,225	87,301	436,526
Other Female Beef Cattle	187,615	89,128	276,743
Male Cattle	163,096	116,069	279,165
Calves	397,261	129,375	526,636
Total cattle[4]	**1,284,676**	**508,680**	**1,793,356**
Sheep:			
Ewes for breeding	2,365,887	238,298	2,604,185
Rams for service	77,421	9,386	86,807
Other sheep one year old and over for breeding	572,468	58,717	631,185
Others[5]	87,448	12,487	99,935
Lambs	2,898,562	371,947	3,270,509
Total sheep	**6,001,786**	**690,835**	**6,692,621**
Pigs:			
Female breeding herd: Total	6,276	23,952	30,228
Gilts 50kg and over for breeding	845	4,162	5,007
Boars for service	417	506	923
Barren sows for fattening	291	319	610
Other pigs: 20kg and over	35,743	155,183	190,926
Under 20kg	15,964	72,640	88,604
Total	51,707	227,823	279,530
Total pigs	**59,536**	**256,762**	**316,298**
Poultry:			
Fowls in laying flock: Hens in 1st laying season	1,599,884	2,179,153	3,779,037
Moulted hens	30,784	14,500	45,284
Total	1,630,668	2,193,653	3,824,321
Pullets being reared for laying	213,917	1,671,115	1,885,032
Fowls for breeding	252,626	859,496	1,112,122
Broilers and other table fowls	937,255	6,867,491	7,804,746
Other poultry[6]	94,870	21,005	115,875
Total poultry	**3,129,336**	**11,612,760**	**14,742,096**
Goats and kids	**2,942**	**1,549**	**4,491**
Deer	**5,705**	**1,302**	**7,007**
Horses:			
Horses used in agriculture or horticulture	541	409	950
All other horses and ponies	20,255	15,788	36,043
Total horses	**20,796**	**16,197**	**36,993**
Camelids[7]:			
Alpacas	790	516	1,306
Llamas	c	c	393
Other camelids	c	c	93
Total camelids	**1,040**	**752**	**1,792**
Beehives	**1,836**	**2,585**	**4,421**
Other livestock	**245**	**182**	**427**

(1) A holding is classified as LFA if 50% or more of its land is assessed as being disadvantaged or severely disadvantaged for subsidy purposes.
(2) Female dairy cattle aged 2 years old and over with offspring.
(3) Female beef cattle aged 2 years old and over with offspring.
(4) Cattle kept by landless keepers included in LFA figures.
(5) Includes draft and cast ewes, and wethers in England and Wales.
(6) Includes turkeys, ducks, geese and guinea fowl.
(7) Includes estimate for holdings that have not returned a census form since camelid data was first collected in 2010. Camelid figures are not compatible with previous editions of ERSA.
c data suppressed to prevent disclosure of individual holdings.

Table C10(i) Number of holdings with livestock by region and sub-region, June 2014

Holdings

	North West					North East		South East		
	Total	Shetland	Orkney	Eileanan an Iar	Highland	Total	Grampian	Total	Tayside	Fife
Female Dairy Cattle										
Female Dairy Cattle aged 1-2	66	c	23	c	32	75	75	108	29	27
Female Dairy Cattle 2 years and over with offspring	166	c	41	c	92	165	165	202	51	47
Female Dairy Cattle 2 years and over without offspring	61	c	27	c	24	85	85	124	28	35
Total Female Dairy Cattle	**209**	**22**	**49**	**19**	**119**	**210**	**210**	**244**	**64**	**55**
Female Beef Cattle										
Female Beef Cattle aged 1-2	1,879	101	475	184	1,119	1,691	1,691	1,546	566	226
Female Beef Cattle 2 years and over with offspring	2,753	145	498	398	1,712	1,615	1,615	1,608	594	228
Female Beef Cattle 2 years and over without offspring	1,855	80	410	201	1,164	1,485	1,485	1,471	546	207
Total Female Beef Cattle	**2,980**	**160**	**529**	**434**	**1,857**	**2,010**	**2,010**	**1,858**	**700**	**275**
Male Cattle										
Male Cattle aged 1-2	1,417	83	473	106	755	1,640	1,640	1,427	525	223
Male Cattle aged 2 and over	1,762	90	434	150	1,088	1,710	1,710	1,598	590	235
Total Male Cattle	**2,104**	**121**	**500**	**213**	**1,270**	**1,983**	**1,983**	**1,766**	**662**	**265**
Calves										
Female Dairy Cattle under 1	80	c	26	c	41	77	77	100	30	26
Female Beef Cattle under 1	2,335	c	485	c	1,444	1,690	1,690	1,586	578	225
Male Cattle under 1	2,354	134	485	287	1,448	1,810	1,810	1,654	610	233
Total Calves	**2,598**	**145**	**501**	**344**	**1,608**	**1,954**	**1,954**	**1,738**	**641**	**248**
Total Cattle	**3,126**	**172**	**549**	**456**	**1,949**	**2,318**	**2,318**	**2,021**	**774**	**302**
Sheep:										
Ewes for breeding	6,030	1,059	432	2,003	2,536	1,327	1,327	1,891	646	180
Other sheep one year old and over for breeding	4,552	862	283	1,502	1,905	715	715	1,391	465	107
Rams for service	4,446	826	364	1,433	1,823	1,124	1,124	1,592	542	148
Lambs	5,883	1,028	445	1,921	2,489	1,395	1,395	1,943	661	183
Other sheep not for breeding	2,918	513	239	1,061	1,105	563	563	758	268	90
Total sheep	**6,878**	**1,161**	**528**	**2,229**	**2,960**	**1,716**	**1,716**	**2,251**	**764**	**244**
Pigs:										
Female breeding herd[1]	165	8	17	24	116	99	99	114	35	13
All other non-breeding pigs	336	19	38	48	231	230	230	249	77	32
Total pigs	**379**	**21**	**44**	**56**	**258**	**241**	**241**	**267**	**81**	**35**
Poultry:										
Fowls for producing eggs	2,264	256	335	437	1,236	977	977	1,163	411	214
Fowls for breeding[2]	c	117	178	218	c	c	c	501	164	c
Broilers and other table fowls and other poultry	c	142	207	168	c	c	c	536	182	c
Total poultry	**2,499**	**297**	**369**	**481**	**1,352**	**1,126**	**1,126**	**1,360**	**479**	**241**
Goats and kids	**210**	**17**	**52**	**16**	**125**	**154**	**154**	**196**	**93**	**36**
Deer	**20**	**0**	**c**	**0**	**c**	**12**	**12**	**27**	**16**	**5**
Horses:										
Horses used in agriculture or horticulture	60	9	7	15	29	45	45	74	21	14
All other horses and ponies	1,373	184	189	130	870	1,449	1,449	1,928	633	325
Total horses	**1,411**	**188**	**194**	**142**	**887**	**1,477**	**1,477**	**1,961**	**643**	**334**
Camelids[3]	**45**	**c**	**c**	**c**	**35**	**47**	**47**	**68**	**28**	**11**
Beehives	**193**	**c**	**11**	**c**	**171**	**141**	**141**	**264**	**107**	**36**
Other livestock	**16**	**0**	**c**	**c**	**c**	**7**	**7**	**13**	**c**	**c**

(1) Sows in pig, gilts in pig and other sows for breeding.

(2) Hens laying eggs to hatch layer and table chicks and cocks.

(3) Includes estimate for holdings that have not returned a census form since camelid data was first collected in 2010. Camelid figures are not compatible with previous editions of ERSA.

c data suppressed to prevent disclosure of individual holdings.

South East		South West							
Lothian	Scottish Borders	Total	East Central	Argyll & Bute	Clyde Valley	Ayrshire	Dumfries & Galloway	Scotland	
									Female Dairy Cattle
28	24	954	36	66	171	274	407	1,203	Female Dairy Cattle aged 1-2
48	56	1,307	53	90	282	360	522	1,840	Female Dairy Cattle 2 years and over with offspring
35	26	1,118	44	71	227	321	455	1,388	Female Dairy Cattle 2 years and over without offspring
54	**71**	**1,460**	**63**	**98**	**317**	**398**	**584**	**2,123**	**Total Female Dairy Cattle**
									Female Beef Cattle
198	556	3,322	280	433	660	695	1,254	8,438	Female Beef Cattle aged 1-2
205	581	3,372	316	553	661	642	1,200	9,348	Female Beef Cattle 2 years and over with offspring
190	528	3,182	280	470	618	654	1,160	7,993	Female Beef Cattle 2 years and over without offspring
244	**639**	**4,049**	**358**	**599**	**803**	**830**	**1,459**	**10,897**	**Total Female Beef Cattle**
									Male Cattle
190	489	3,174	262	325	644	716	1,227	7,658	Male Cattle aged 1-2
213	560	3,559	302	458	697	745	1,357	8,629	Male Cattle aged 2 and over
234	**605**	**3,946**	**350**	**504**	**790**	**831**	**1,471**	**9,799**	**Total Male Cattle**
									Calves
25	19	931	31	69	161	278	392	1,188	Female Dairy Cattle under 1
200	583	3,594	300	515	684	751	1,344	9,205	Female Beef Cattle under 1
214	597	3,764	324	515	725	793	1,407	9,582	Male Cattle under 1
225	**624**	**3,947**	**340**	**546**	**762**	**835**	**1,464**	**10,237**	**Total Calves**
274	**671**	**4,504**	**400**	**636**	**906**	**925**	**1,637**	**11,969**	**Total Cattle**
									Sheep:
245	820	3,466	317	715	642	591	1,201	12,714	Ewes for breeding
167	652	2,380	215	550	433	389	793	9,038	Other sheep one year old and over for breeding
204	698	2,953	267	607	543	494	1,042	10,115	Rams for service
262	837	3,485	328	698	651	599	1,209	12,706	Lambs
115	285	1,337	118	328	218	214	459	5,576	Other sheep not for breeding
314	**929**	**3,958**	**368**	**790**	**735**	**692**	**1,373**	**14,803**	**Total sheep**
									Pigs:
28	38	148	18	c	c	18	61	526	Female breeding herd[1]
57	83	306	40	c	c	49	114	1,121	All other non-breeding pigs
60	**91**	**348**	**45**	**c**	**c**	**55**	**131**	**1,235**	**Total pigs**
									Poultry:
180	358	1,706	c	275	346	327	c	6,110	Fowls for producing eggs
90	c	783	92	120	160	128	283	2,810	Fowls for breeding[2]
96	c	811	c	111	181	163	c	2,947	Broilers and other table fowls and other poultry
223	**417**	**1,959**	**207**	**312**	**405**	**378**	**657**	**6,944**	**Total poultry**
29	**38**	**245**	**23**	**27**	**50**	**64**	**81**	**805**	**Goats and kids**
c	**c**	**31**	**c**	**6**	**c**	**6**	**12**	**90**	**Deer**
									Horses:
11	28	93	5	8	23	28	29	272	Horses used in agriculture or horticulture
345	625	2,303	274	188	591	481	769	7,053	All other horses and ponies
349	**635**	**2,351**	**278**	**195**	**600**	**492**	**786**	**7,200**	**Total horses**
11	**18**	**80**	**c**	**12**	**14**	**c**	**26**	**240**	**Camelids**
58	**63**	**253**	**16**	**29**	**36**	**58**	**114**	**851**	**Beehives**
c	**c**	**26**	**c**	**c**	**5**	**5**	**11**	**62**	**Other livestock**

Table C10(ii) Number of livestock by region and sub-region, June 2014

Number

	North West					North East		South East		
	Total	Shetland	Orkney	Eileanan an Iar	Highland	Total	Grampian	Total	Tayside	Fife
Female Dairy Cattle										
Female Dairy Cattle aged 1-2	1,251	c	590	c	619	2,729	2,729	4,812	964	1,535
Female Dairy Cattle 2 years and over with offspring	4,381	c	2,184	c	1,827	7,766	7,766	13,198	2,923	3,832
Female Dairy Cattle 2 years and over without offspring	941	c	518	c	342	1,611	1,611	3,438	653	1,219
Total Female Dairy Cattle	**6,573**	**467**	**3,292**	**26**	**2,788**	**12,106**	**12,106**	**21,448**	**4,540**	**6,586**
Female Beef Cattle										
Female Beef Cattle aged 1-2	24,932	400	10,874	490	13,168	56,616	56,616	40,462	12,914	5,830
Female Beef Cattle 2 years and over with offspring	78,452	1,624	26,310	2,701	47,817	88,671	88,671	100,823	32,961	12,613
Female Beef Cattle 2 years and over without offspring	11,195	222	3,772	569	6,632	19,982	19,982	16,833	5,783	2,440
Total Female Beef Cattle	**114,579**	**2,246**	**40,956**	**3,760**	**67,617**	**165,269**	**165,269**	**158,118**	**51,658**	**20,883**
Male Cattle										
Male Cattle aged 1-2	19,973	308	10,035	285	9,345	63,353	63,353	40,431	11,637	7,668
Male Cattle aged 2 and over	6,223	145	2,292	298	3,488	22,412	22,412	13,389	4,802	2,438
Total Male Cattle	**26,196**	**453**	**12,327**	**583**	**12,833**	**85,765**	**85,765**	**53,820**	**16,439**	**10,106**
Calves										
Female Dairy Cattle under 1	1,174	c	452	c	636	2,736	2,736	4,991	1,006	1,609
Female Beef Cattle under 1	35,641	c	12,593	c	21,297	44,023	44,023	46,468	14,955	5,931
Male Cattle under 1	36,356	797	13,110	1,056	21,393	49,258	49,258	52,291	16,504	7,921
Total Calves	**73,171**	**1,620**	**26,155**	**2,070**	**43,326**	**96,017**	**96,017**	**103,750**	**32,465**	**15,461**
Total Cattle	**220,519**	**4,786**	**82,730**	**6,439**	**126,564**	**359,157**	**359,157**	**337,136**	**105,102**	**53,036**
Sheep:										
Ewes for breeding	587,953	122,099	43,220	66,927	355,707	223,833	223,833	767,392	236,506	31,472
Other sheep one year old and over for breeding	143,234	28,820	9,229	15,831	89,354	51,510	51,510	195,630	62,281	5,422
Rams for service	20,863	3,905	1,730	2,928	12,300	7,878	7,878	24,233	7,420	1,026
Lambs	630,616	119,638	58,464	60,402	392,112	328,003	328,003	1,036,724	296,899	47,350
Other sheep not for breeding	34,699	6,683	3,488	8,124	16,404	9,579	9,579	21,582	9,382	1,441
Total sheep	**1,417,365**	**281,145**	**116,131**	**154,212**	**865,877**	**620,803**	**620,803**	**2,045,561**	**612,488**	**86,711**
Pigs:										
Female breeding herd[1]	1,847	35	47	54	1,711	18,020	18,020	8,586	3,483	370
All other non-breeding pigs	17,912	133	318	179	17,282	163,422	163,422	91,819	34,923	4,115
Total pigs	**19,759**	**168**	**365**	**233**	**18,993**	**181,442**	**181,442**	**100,405**	**38,406**	**4,485**
Poultry:										
Fowls for producing eggs	141,097	3,588	6,541	6,011	124,957	875,914	875,914	3,924,095	317,635	985,023
Fowls for breeding[2]	c	371	680	657	c	c	c	499,680	144,633	c
Broilers and other table fowls and other poultry	c	1,421	2,503	1,392	c	c	c	5,966,726	2,154,237	c
Total poultry	**189,903**	**5,380**	**9,724**	**8,060**	**166,739**	**1,913,418**	**1,913,418**	**10,390,501**	**2,616,505**	**1,969,206**
Goats and kids	**1,017**	**58**	**203**	**74**	**682**	**978**	**978**	**1,047**	**472**	**188**
Deer	**1,548**	**0**	**c**	**0**	**c**	**1,708**	**1,708**	**1,751**	**833**	**543**
Horses:										
Horses used in agriculture or horticulture	162	34	11	28	89	121	121	349	72	157
All other horses and ponies	5,613	1,246	729	289	3,349	7,452	7,452	11,248	3,595	2,031
Total horses	**5,775**	**1,280**	**740**	**317**	**3,438**	**7,573**	**7,573**	**11,597**	**3,667**	**2,188**
Camelids[3]	**313**	**c**	**c**	**c**	**192**	**389**	**389**	**415**	**173**	**52**
Beehives	**539**	**c**	**44**	**c**	**447**	**968**	**968**	**1,944**	**1,128**	**315**
Other livestock	**64**	**0**	**c**	**c**	**c**	**45**	**45**	**164**	**c**	**c**

(1) Sows in pig, gilts in pig and other sows for breeding.

(2) Hens laying eggs to hatch layer and table chicks and cocks.

(3) Includes estimate for holdings that have not returned a census form since camelid data was first collected in 2010. Camelid figures are not compatible with previous editions of ERSA.

c data suppressed to prevent disclosure of individual holdings.

Number

South East		South West							
Lothian	Scottish Borders	Total	East Central	Argyll & Bute	Clyde Valley	Ayrshire	Dumfries & Galloway	Scotland	
									Female Dairy Cattle
685	1,628	47,018	1,736	2,061	7,214	11,133	24,874	55,810	Female Dairy Cattle aged 1-2
2,652	3,791	144,371	5,083	7,040	20,448	36,882	74,918	169,716	Female Dairy Cattle 2 years and over with offspring
816	750	42,770	1,340	2,057	6,765	11,874	20,734	48,760	Female Dairy Cattle 2 years and over without offspring
4,153	**6,169**	**234,159**	**8,159**	**11,158**	**34,427**	**59,889**	**120,526**	**274,286**	**Total Female Dairy Cattle**
									Female Beef Cattle
5,442	16,276	68,477	4,708	4,565	11,507	14,010	33,687	190,487	Female Beef Cattle aged 1-2
13,185	42,064	168,580	12,493	19,966	27,661	30,150	78,310	436,526	Female Beef Cattle 2 years and over with offspring
2,512	6,098	38,246	2,954	3,646	6,866	7,821	16,959	86,256	Female Beef Cattle 2 years and over without offspring
21,139	**64,438**	**275,303**	**20,155**	**28,177**	**46,034**	**51,981**	**128,956**	**713,269**	**Total Female Beef Cattle**
									Male Cattle
6,325	14,801	77,638	5,982	3,298	13,148	16,862	38,348	201,395	Male Cattle aged 1-2
2,215	3,934	35,746	2,372	2,096	6,188	8,334	16,756	77,770	Male Cattle aged 2 and over
8,540	**18,735**	**113,384**	**8,354**	**5,394**	**19,336**	**25,196**	**55,104**	**279,165**	**Total Male Cattle**
									Calves
690	1,686	48,153	1,835	2,181	6,988	11,627	25,522	57,054	Female Dairy Cattle under 1
6,295	19,287	88,686	5,701	8,994	13,793	17,644	42,554	214,818	Female Beef Cattle under 1
7,271	20,595	116,859	7,493	10,097	18,410	24,858	56,001	254,764	Male Cattle under 1
14,256	**41,568**	**253,698**	**15,029**	**21,272**	**39,191**	**54,129**	**124,077**	**526,636**	**Total Calves**
48,088	**130,910**	**876,544**	**51,697**	**66,001**	**138,988**	**191,195**	**428,663**	**1,793,356**	**Total Cattle**
									Sheep:
73,825	425,589	1,025,007	107,399	191,053	157,891	175,497	393,167	2,604,185	Ewes for breeding
18,035	109,892	240,811	26,112	46,495	39,120	38,991	90,093	631,185	Other sheep one year old and over for breeding
2,613	13,174	33,833	3,507	6,648	5,519	5,481	12,678	86,807	Rams for service
102,913	589,562	1,275,166	128,543	191,763	206,176	229,846	518,838	3,270,509	Lambs
3,377	7,382	34,075	1,911	5,803	15,646	3,592	7,123	99,935	Other sheep not for breeding
200,763	**1,145,599**	**2,608,892**	**267,472**	**441,762**	**424,352**	**453,407**	**1,021,899**	**6,692,621**	**Total sheep**
									Pigs:
2,296	2,437	1,775	55	c	c	47	880	30,228	Female breeding herd[1]
25,574	27,207	12,917	289	c	c	295	6,745	286,070	All other non-breeding pigs
27,870	**29,644**	**14,692**	**344**	**c**	**c**	**342**	**7,625**	**316,298**	**Total pigs**
									Poultry:
232,808	2,388,629	768,247	c	12,436	139,338	248,596	c	5,709,353	Fowls for producing eggs
116,951	c	582,996	139,060	428	99,746	100,889	242,873	1,112,122	Fowls for breeding[2]
2,166,223	c	897,031	c	1,138	5,574	42,453	c	7,920,621	Broilers and other table fowls and other poultry
2,515,982	**3,288,808**	**2,248,274**	**417,656**	**14,002**	**244,658**	**391,938**	**1,180,020**	**14,742,096**	**Total poultry**
157	**230**	**1,449**	**73**	**127**	**200**	**667**	**382**	**4,491**	**Goats and kids**
c	**c**	**2,000**	**c**	**462**	**c**	**67**	**866**	**7,007**	**Deer**
									Horses:
29	91	318	41	14	73	77	113	950	Horses used in agriculture or horticulture
2,554	3,068	11,730	1,548	889	3,412	2,834	3,047	36,043	All other horses and ponies
2,583	**3,159**	**12,048**	**1,589**	**903**	**3,485**	**2,911**	**3,160**	**36,993**	**Total horses**
123	**67**	**675**	**c**	**192**	**135**	**c**	**207**	**1,792**	**Camelids**
348	**153**	**970**	**23**	**87**	**83**	**182**	**595**	**4,421**	**Beehives**
c	**c**	**154**	**c**	**c**	**21**	**30**	**50**	**427**	**Other livestock**

Table C11 Number of holdings with dairy cows[1] and number of dairy cows by region and size group, June 2014

Herd size group	North West		North East		South East		South West		Scotland	
	Holdings	Number	Holdings	Number	Holdings	Number	Holdings	Number	Holdings	Number
1-4	129	169	113	155	108	141	363	580	713	1,045
5-19	7	59	7	86	14	103	81	771	109	1,019
20-49	5	202	5	194	7	223	51	1,759	68	2,378
50-74	c	c	c	c	10	617	95	5,873	115	7,137
75-99	c	c	c	c	13	1,116	112	9,775	132	11,497
100-149	8	963	10	1,182	21	2,547	248	30,841	287	35,533
150 & over	9	2,454	21	5,430	29	8,451	357	94,772	416	111,107
Total	**166**	**4,381**	**165**	**7,766**	**202**	**13,198**	**1,307**	**144,371**	**1,840**	**169,716**

(1) Female dairy cattle aged 2 years old and over with offspring.
c data suppressed to prevent disclosure of individual holdings.

Table C12 Number of holdings with beef cows[1] and number of beef cows by region and size group, June 2014

Herd size group	North West		North East		South East		South West		Scotland	
	Holdings	Number	Holdings	Number	Holdings	Number	Holdings	Number	Holdings	Number
1-4	860	1,995	269	567	223	473	632	1,330	1,984	4,365
5-19	894	8,911	354	4,078	247	2,779	735	7,981	2,230	23,749
20-49	523	16,414	349	11,524	407	13,637	797	26,526	2,076	68,101
50-74	169	10,429	226	13,786	249	15,276	451	27,227	1,095	66,718
75-99	106	9,060	147	12,485	168	14,544	282	24,160	703	60,249
100-149	120	14,354	146	17,560	166	20,022	271	32,341	703	84,277
150 & over	81	17,289	124	28,671	148	34,092	204	49,015	557	129,067
Total	**2,753**	**78,452**	**1,615**	**88,671**	**1,608**	**100,823**	**3,372**	**168,580**	**9,348**	**436,526**

(1) Female beef cattle aged 2 years old and over with offspring.

Table C13 Number of holdings with calves and number of calves by region and size group, June 2014

Herd size group	North West		North East		South East		South West		Scotland	
	Holdings	Number	Holdings	Number	Holdings	Number	Holdings	Number	Holdings	Number
1-4	833	1,848	324	738	227	517	415	963	1,799	4,066
5-19	845	8,686	533	5,993	350	3,953	775	8,611	2,503	27,243
20-49	469	14,948	444	14,521	434	14,749	946	31,366	2,293	75,584
50-74	168	10,210	241	14,750	241	14,779	596	36,580	1,246	76,319
75-99	99	8,534	134	11,435	160	13,769	422	36,567	815	70,305
100-149	105	12,586	149	17,818	177	21,469	429	52,491	860	104,364
150 & over	79	16,359	129	30,762	149	34,514	364	87,120	721	168,755
Total	**2,598**	**73,171**	**1,954**	**96,017**	**1,738**	**103,750**	**3,947**	**253,698**	**10,237**	**526,636**

Table C14 Number of holdings with breeding ewes and number of breeding ewes by region and size group, June 2014

Flock size group	North West		North East		South East		South West		Scotland	
	Holdings	Number	Holdings	Number	Holdings	Number	Holdings	Number	Holdings	Number
1-24	2,410	30,020	402	4,196	440	4,058	728	7,542	3,980	45,816
25-49	1,222	42,673	146	5,303	125	4,405	345	12,206	1,838	64,587
50-99	973	67,965	196	14,134	135	9,296	375	27,040	1,679	118,435
100-199	676	94,034	234	33,368	213	30,731	489	70,951	1,612	229,084
200-299	265	63,557	135	32,846	147	36,142	377	91,629	924	224,174
300-499	243	95,241	112	42,254	251	97,566	482	188,216	1,088	423,277
500-699	121	71,116	45	26,043	170	100,666	251	147,414	587	345,239
700-999	73	59,053	29	23,904	183	153,847	207	169,367	492	406,171
1,000 & over	47	64,294	28	41,785	227	330,681	212	310,642	514	747,402
Total	**6,030**	**587,953**	**1,327**	**223,833**	**1,891**	**767,392**	**3,466**	**1,025,007**	**12,714**	**2,604,185**

Table C15 Number of holdings with female breeding pigs[1] and number of female breeding pigs by region and size group, June 2014

Herd size group	North West		North East		South East		South West		Scotland	
	Holdings	Number	Holdings	Number	Holdings	Number	Holdings	Number	Holdings	Number
1-4	140	252	51	104	70	122	129	247	390	725
5-49	c	c	c	c	23	316	13	108	66	697
50-99	0	0	c	c	c	c	c	c	10	694
100-249	c	c	6	989	c	c	c	c	14	2,152
250 & over	c	c	29	16,557	11	7,063	c	c	46	25,960
Total	**165**	**1,847**	**99**	**18,020**	**114**	**8,586**	**148**	**1,775**	**526**	**30,228**

(1) Sows and gilts in pig and other sows for breeding.
c data suppressed to prevent disclosure of individual holdings.

Table C16 Number of holdings with fattening pigs[1] and number of fattening pigs by region and size group, June 2014

Herd size group	North West		North East		South East		South West		Scotland	
	Holdings	Number	Holdings	Number	Holdings	Number	Holdings	Number	Holdings	Number
1-9	184	516	91	288	123	376	178	484	576	1,664
10-99	22	409	16	394	25	683	31	864	94	2,350
100 & over	10	11,453	65	115,780	34	52,936	6	6,743	115	186,912
Total	**216**	**12,378**	**172**	**116,462**	**182**	**53,995**	**215**	**8,091**	**785**	**190,926**

(1) Non-breeding pigs, 20kg liveweight and over, excluding Barren Sows.

Table C17 Number of holdings with fowls for producing eggs for eating by region and size group, June 2014

Flock size group	North West		North East		South East		South West		Scotland	
	Holdings	Number	Holdings	Number	Holdings	Number	Holdings	Number	Holdings	Number
1-19	1,852	15,083	787	5,829	840	6,741	1,357	10,476	4,836	38,129
20-49	329	9,196	119	3,290	198	5,481	249	7,034	895	25,001
50-99	43	2,777	21	1,450	37	2,449	34	2,223	135	8,899
100-999	32	7,679	23	4,739	22	5,242	33	8,794	110	26,454
1,000 & over	8	106,362	27	860,606	66	3,904,182	33	739,720	134	5,610,870
Total	**2,264**	**141,097**	**977**	**875,914**	**1,163**	**3,924,095**	**1,706**	**768,247**	**6,110**	**5,709,353**

Table C18 Number of holdings with breeding fowls[1] and number of breeding fowls by region and size group, June 2014

Flock size group	North West		North East		South East		South West		Scotland	
	Holdings	Number	Holdings	Number	Holdings	Number	Holdings	Number	Holdings	Number
1-4	243	567	81	182	80	178	144	308	548	1,235
5-9	82	525	26	162	25	161	43	284	176	1,132
10-19	36	506	24	318	19	224	26	346	105	1,394
20-49	c	c	c	c	12	349	20	559	54	1,438
50-999	c	c	c	c	c	c	5	393	12	835
1,000-9,999	0	0	0	0	8	54,792	6	44,229	14	99,021
10,000 & over	0	0	c	c	c	c	17	467,548	32	870,141
Total	**c**	**c**	**c**	**c**	**159**	**436,387**	**261**	**513,667**	**941**	**975,196**

(1) Females laying eggs to hatch layer and table chicks.

c data suppressed to prevent disclosure of individual holdings.

Table C19 Number of occupiers, spouses and employees by Less Favoured Area category, June 2014

Number

	LFA[1]	Non-LFA	Total
Working occupiers:			
Full-time	6,365	3,275	9,640
Part-time: Half time or more	2,960	925	3,885
Less than half time	9,552	3,212	12,764
Total working occupiers	**18,877**	**7,412**	**26,289**
Occupiers not working on the holding	**2,144**	**1,373**	**3,517**
Working spouses:			
Full-time	1,269	473	1,742
Part-time: Half time or more	1,529	613	2,142
Less than half time	6,349	2,463	8,812
Total working spouses	**9,147**	**3,549**	**12,696**
Spouses not working on the holding	**1,932**	**1,264**	**3,196**
Full-time employees:			
Male: Business partners	1,367	990	2,357
Hired	3,365	3,940	7,305
Family	1,206	674	1,880
Female: Business partners	199	125	324
Hired	344	681	1,025
Family	231	111	342
Total full-time employees	**6,712**	**6,521**	**13,233**
Part-time employees:			
Male: Business partners	446	247	693
Hired	1,305	1,013	2,318
Family	1,356	460	1,816
Female: Business partners	238	135	373
Hired	507	767	1,274
Family	676	265	941
Total part-time employees	**4,528**	**2,887**	**7,415**
Casual and seasonal employees:			
Male	1,579	2,831	4,410
Female	347	1,909	2,256
Total casual and seasonal employees	**1,926**	**4,740**	**6,666**
Total employees	**13,166**	**14,148**	**27,314**
Total workforce (including occupiers and spouses)	**41,190**	**25,109**	**66,299**

(1) A holding is classified as LFA if 50% or more of its land is assessed as being disadvantaged or severely disadvantaged for subsidy purposes.

Table C20 Number of occupiers and spouses by age group, June 2014

Number

	Under 41	41 to 54	55 to 64	Over 64	Total
Working occupiers:					
Full-time	796	3,241	2,721	2,882	9,640
Part-time: Half time or more	409	1,197	962	1,317	3,885
Less than half time	1,573	4,120	3,242	3,829	12,764
Total working occupiers	**2,778**	**8,558**	**6,925**	**8,028**	**26,289**
Occupiers not working on the holding	357	801	868	1,491	3,517
Working spouses:					
Full-time	151	595	493	503	1,742
Part-time: Half time or more	242	817	605	478	2,142
Less than half time	1,186	3,306	2,367	1,953	8,812
Total working spouses	**1,579**	**4,718**	**3,465**	**2,934**	**12,696**
Spouses not working on the holding	468	940	786	1,002	3,196

Table C21(i) Number of holdings[1] with occupiers, spouses and employees by region and sub-region, June 2014

Holdings

	North West					North East		South East		
	Total	Shetland	Orkney	Eileanan an Iar	Highland	Total	Grampian	Total	Tayside	Fife
Working occupiers:										
Full-time	1,860	172	389	166	1,133	1,944	1,944	2,230	885	366
Part-time: Half time or more	1,746	218	150	443	935	559	559	619	216	102
Less than half time	6,242	757	378	2,101	3,006	1,996	1,996	1,837	724	305
Total working occupiers	**9,848**	**1,147**	**917**	**2,710**	**5,074**	**4,499**	**4,499**	**4,686**	**1,825**	**773**
Occupiers not working on the holding	1,103	90	162	303	548	913	913	621	246	117
Working spouses										
Full-time	373	42	70	31	230	314	314	330	121	59
Part-time: Half time or more	651	83	107	89	372	371	371	423	154	66
Less than half time	3,388	444	319	840	1,785	1,497	1,497	1,578	633	235
Total working spouses	**4,412**	**569**	**496**	**960**	**2,387**	**2,182**	**2,182**	**2,331**	**908**	**360**
Spouses not working on the holding	881	70	128	230	453	833	833	620	226	128
Full-time employees:										
Male: Business partners	203	7	46	7	143	385	385	530	222	85
Hired	417	7	76	15	319	543	543	1,341	506	200
Family	213	12	54	25	122	288	288	419	154	63
Female: Business partners	35	0	8	0	27	52	52	79	34	15
Hired	47	c	c	c	c	63	63	183	79	32
Family	56	c	c	c	c	41	41	74	33	8
Total full-time employees	**779**	**27**	**153**	**52**	**547**	**1,088**	**1,088**	**1,999**	**770**	**293**
Part-time employees:										
Male: Business partners	103	21	19	9	54	122	122	159	78	25
Hired	269	15	30	12	212	242	242	476	175	63
Family	536	87	50	123	276	262	262	240	99	35
Female: Business partners	58	c	17	c	34	74	74	84	33	16
Hired	102	c	8	c	83	111	111	255	116	34
Family	240	41	23	48	128	109	109	151	46	18
Total part-time employees	**1,062**	**142**	**116**	**166**	**638**	**771**	**771**	**1,118**	**451**	**159**
Casual and seasonal employees:										
Male	328	34	42	51	201	232	232	423	148	59
Female	95	14	13	11	57	66	66	135	65	22
Total casual and seasonal employees	**367**	**38**	**50**	**55**	**224**	**263**	**263**	**477**	**169**	**66**
Total employees	**1,867**	**180**	**270**	**251**	**1,166**	**1,670**	**1,670**	**2,708**	**1,039**	**395**
Total workforce (including occupiers and spouses)	**10,511**	**1,187**	**965**	**2,850**	**5,509**	**4,848**	**4,848**	**5,324**	**2,093**	**848**

(1) Except for totals, holdings with employees in more than one category are counted more than once.

c data suppressed to prevent disclosure of individual holdings.

South East		South West							
Lothian	Scottish Borders	Total	East Central	Argyll & Bute	Clyde Valley	Ayrshire	Dumfries & Galloway	Scotland	
									Working occupiers:
341	638	3,606	341	419	744	811	1,291	9,640	Full-time
106	195	961	103	175	200	178	305	3,885	Part-time: Half time or more
268	540	2,689	288	474	613	489	825	12,764	Less than half time
715	**1,373**	**7,256**	**732**	**1,068**	**1,557**	**1,478**	**2,421**	**26,289**	**Total working occupiers**
104	154	880	75	141	169	256	239	3,517	Occupiers not working on the holding
									Working spouses
60	90	725	60	78	146	190	251	1,742	Full-time
56	147	697	79	117	113	151	237	2,142	Part-time: Half time or more
221	489	2,349	237	329	498	468	817	8,812	Less than half time
337	**726**	**3,771**	**376**	**524**	**757**	**809**	**1,305**	**12,696**	**Total working spouses**
111	155	862	81	113	171	242	255	3,196	Spouses not working on the holding
									Full-time employees:
78	145	749	77	68	155	176	273	1,867	Male: Business partners
227	408	1,174	98	135	204	210	527	3,475	Hired
73	129	673	59	71	140	157	246	1,593	Family
11	19	132	6	14	27	29	56	298	Female: Business partners
37	35	134	13	19	39	26	37	427	Hired
16	17	143	10	18	35	45	35	314	Family
331	**605**	**2,320**	**207**	**253**	**467**	**480**	**913**	**6,186**	**Total full-time employees**
									Part-time employees:
15	41	206	23	20	44	51	68	590	Male: Business partners
75	163	618	50	76	125	113	254	1,605	Hired
41	65	503	56	75	125	95	152	1,541	Family
13	22	129	12	8	39	27	43	345	Female: Business partners
39	66	242	26	36	43	43	94	710	Hired
31	56	312	38	35	76	51	112	812	Family
174	**334**	**1,657**	**161**	**214**	**365**	**315**	**602**	**4,608**	**Total part-time employees**
									Casual and seasonal employees:
68	148	649	c	c	123	131	249	1,632	Male
17	31	134	c	c	25	38	37	430	Female
78	**164**	**716**	**66**	**99**	**139**	**150**	**262**	**1,823**	**Total casual and seasonal employees**
439	**835**	**3,619**	**352**	**451**	**765**	**720**	**1,331**	**9,864**	**Total employees**
821	**1,562**	**7,921**	**819**	**1,182**	**1,705**	**1,590**	**2,625**	**28,604**	**Total workforce (including occupiers and spouses)**

Table C21(ii) Number of occupiers, spouses and employees by region and sub-region, June 2014

Number

	North West					North East		South East		
	Total	Shetland	Orkney	Eileanan an Iar	Highland	Total	Grampian	Total	Tayside	Fife
Working occupiers:										
Full-time	1,860	172	389	166	1,133	1,944	1,944	2,230	885	366
Part-time: Half time or more	1,746	218	150	443	935	559	559	619	216	102
Less than half time	6,242	757	378	2,101	3,006	1,996	1,996	1,837	724	305
Total working occupiers	**9,848**	**1,147**	**917**	**2,710**	**5,074**	**4,499**	**4,499**	**4,686**	**1,825**	**773**
Occupiers not working on the holding	1,103	90	162	303	548	913	913	621	246	117
Working spouses										
Full-time	373	42	70	31	230	314	314	330	121	59
Part-time: Half time or more	651	83	107	89	372	371	371	423	154	66
Less than half time	3,388	444	319	840	1,785	1,497	1,497	1,578	633	235
Total working spouses	**4,412**	**569**	**496**	**960**	**2,387**	**2,182**	**2,182**	**2,331**	**908**	**360**
Spouses not working on the holding	881	70	128	230	453	833	833	620	226	128
Full-time employees:										
Male: Business partners	258	8	59	10	181	480	480	669	288	103
Hired	705	8	108	21	568	1,121	1,121	3,189	1,205	519
Family	246	16	59	30	141	341	341	501	184	70
Female: Business partners	35	0	8	0	27	55	55	92	40	19
Hired	80	c	c	c	c	124	124	541	183	74
Family	62	c	c	c	c	43	43	83	34	9
Total full-time employees	**1,386**	**39**	**244**	**72**	**1,031**	**2,164**	**2,164**	**5,075**	**1,934**	**794**
Part-time employees:										
Male: Business partners	136	26	21	11	78	136	136	184	92	28
Hired	356	19	33	13	291	332	332	810	367	126
Family	641	112	57	147	325	312	312	272	108	41
Female: Business partners	69	c	17	c	42	77	77	92	38	17
Hired	155	c	13	c	122	170	170	488	244	84
Family	274	46	23	59	146	123	123	178	51	22
Total part-time employees	**1,631**	**217**	**164**	**246**	**1,004**	**1,150**	**1,150**	**2,024**	**900**	**318**
Casual and seasonal employees:										
Male	487	50	61	80	296	519	519	2,413	1,714	387
Female	141	18	15	14	94	199	199	1,660	1,236	339
Total casual and seasonal employees	**628**	**68**	**76**	**94**	**390**	**718**	**718**	**4,073**	**2,950**	**726**
Total employees	**3,645**	**324**	**484**	**412**	**2,425**	**4,032**	**4,032**	**11,172**	**5,784**	**1,838**
Total workforce (including occupiers and spouses)	**17,905**	**2,040**	**1,897**	**4,082**	**9,886**	**10,713**	**10,713**	**18,189**	**8,517**	**2,971**

c data suppressed to prevent disclosure of individual holdings.

Number

South East		South West							
Lothian	Scottish Borders	Total	East Central	Argyll & Bute	Clyde Valley	Ayrshire	Dumfries & Galloway	Scotland	
									Working occupiers:
341	638	3,606	341	419	744	811	1,291	9,640	Full-time
106	195	961	103	175	200	178	305	3,885	Part-time: Half time or more
268	540	2,689	288	474	613	489	825	12,764	Less than half time
715	**1,373**	**7,256**	**732**	**1,068**	**1,557**	**1,478**	**2,421**	**26,289**	**Total working occupiers**
104	154	880	75	141	169	256	239	3,517	Occupiers not working on the holding
									Working spouses
60	90	725	60	78	146	190	251	1,742	Full-time
56	147	697	79	117	113	151	237	2,142	Part-time: Half time or more
221	489	2,349	237	329	498	468	817	8,812	Less than half time
337	**726**	**3,771**	**376**	**524**	**757**	**809**	**1,305**	**12,696**	**Total working spouses**
111	155	862	81	113	171	242	255	3,196	Spouses not working on the holding
									Full-time employees:
99	179	950	103	88	190	226	343	2,357	Male: Business partners
694	771	2,290	228	220	369	406	1,067	7,305	Hired
96	151	792	64	84	164	192	288	1,880	Family
14	19	142	7	15	29	32	59	324	Female: Business partners
211	73	280	21	33	87	82	57	1,025	Hired
19	21	154	10	20	41	47	36	342	Family
1,133	**1,214**	**4,608**	**433**	**460**	**880**	**985**	**1,850**	**13,233**	**Total full-time employees**
									Part-time employees:
20	44	237	27	20	52	57	81	693	Male: Business partners
104	213	820	98	91	149	156	326	2,318	Hired
50	73	591	67	87	152	108	177	1,816	Family
14	23	135	12	9	42	27	45	373	Female: Business partners
76	84	461	60	52	139	74	136	1,274	Hired
35	70	366	44	44	88	59	131	941	Family
299	**507**	**2,610**	**308**	**303**	**622**	**481**	**896**	**7,415**	**Total part-time employees**
									Casual and seasonal employees:
99	213	991	c	c	181	196	376	4,410	Male
44	41	256	c	c	49	53	47	2,256	Female
143	**254**	**1,247**	**192**	**153**	**230**	**249**	**423**	**6,666**	**Total casual and seasonal employees**
1,575	**1,975**	**8,465**	**933**	**916**	**1,732**	**1,715**	**3,169**	**27,314**	**Total employees**
2,627	**4,074**	**19,492**	**2,041**	**2,508**	**4,046**	**4,002**	**6,895**	**66,299**	**Total workforce (including occupiers and spouses)**

Table C22 Number of holdings with full-time employees and number of full-time employees by region and size group, June 2014

Employee size group	North West		North East		South East		South West		Scotland	
	Holdings	Number	Holdings	Number	Holdings	Number	Holdings	Number	Holdings	Number
1	474	474	632	632	1,020	1,020	1,285	1,285	3,411	3,411
2	178	356	240	480	494	988	591	1,182	1,503	3,006
3	70	210	101	303	199	597	205	615	575	1,725
4	27	108	47	188	104	416	109	436	287	1,148
5-6	17	91	37	199	75	400	68	366	197	1,056
7 & over	13	147	31	362	107	1,654	62	724	213	2,887
Total full-time employees	**779**	**1,386**	**1,088**	**2,164**	**1,999**	**5,075**	**2,320**	**4,608**	**6,186**	**13,233**

Table C23 Number and area of holdings by main farm type, total from Standard Outputs[1] and Standard Labour Requirements[2], 2013 and 2014

Main farm type	2013					2014				
	Holdings	Hectares	Total from Standard Outputs (£)[3]	Average Standard Outputs per holding (£)[3]	Standard Labour Requirements	Holdings	Hectares	Total from Standard Outputs (£)[3]	Average Standard Outputs per holding (£)[3]	Standard Labour Requirements
Specialist Cereals	2,670	253,642	152,404,426	57,080	2,340	2,694	260,806	161,582,243	59,979	2,522
General cropping	1,079	134,532	164,160,576	152,141	2,358	1,064	136,759	165,400,247	155,451	2,422
Specialist horticulture & permanent crops	674	16,841	187,637,097	278,393	4,145	617	17,122	195,317,162	316,559	4,264
Specialist pigs	306	8,442	31,647,209	103,422	355	297	10,943	34,524,014	116,242	395
Specialist poultry	943	12,421	122,882,254	130,310	770	929	11,596	127,351,030	137,084	824
Specialist dairy	894	130,367	276,434,552	309,211	4,647	886	129,885	287,578,615	324,581	4,817
LFA Cattle and sheep	14,442	3,147,524	449,279,825	31,109	19,169	14,327	3,164,652	442,915,148	30,915	19,218
Non-LFA Cattle and sheep	2,345	88,166	69,177,495	29,500	1,971	2,287	87,970	70,148,545	30,673	1,950
Mixed holdings	5,536	300,427	230,755,713	41,683	5,833	5,498	307,706	237,836,298	43,259	5,966
General cropping; forage	22,163	1,432,506	198,004,917	8,934	4,200	22,310	1,409,293	190,964,243	8,560	4,043
Unclassified	1,664	79,139	0	0	365	1,368	59,235	0	0	268
Total	**52,716**	**5,604,008**	**1,882,384,064**	**35,716**	**46,153**	**52,277**	**5,595,968**	**1,913,617,544**	**36,605**	**46,689**

(1) Standard Outputs represent the estimated farm-gate worth (£s) of crops and animals without taking account of the costs incurred in production.

(2) Standard Labour Requirements represent the estimated full-time equivalent (FTE) labour required to farm the crops and animals on the holding
1 Standard Labour Requirement (FTE) = 1900 hours per year

(3) The total amounted generated (in £) using the individual SOs on each farm type listed. The individual SO coefficients for crops and livestock are listed here: www.gov.scot/Topics/Statistics/Browse/Agriculture-Fisheries/Publications/SOCoeffs

Table C24 Number of holdings by Standard Outputs[1], region and sub-region, June 2014

Holdings

	Standard Outputs					
	<10,000	10,000-<20,000	20,000-<40,000	40,000-<80,000	80,000+	Total
North West:	**17,927**	**951**	**718**	**474**	**463**	**20,533**
Shetland	1,512	165	97	c	c	1,818
Orkney	1,435	146	146	139	118	1,984
Eileanan an Iar	6,311	73	26	c	c	6,420
Highland	8,669	567	449	297	329	10,311
North East:	**5,484**	**629**	**689**	**842**	**1,214**	**8,858**
Grampian	5,484	629	689	842	1,214	8,858
South East:	**5,112**	**497**	**576**	**816**	**2,232**	**9,233**
Tayside	1,942	205	219	362	940	3,668
Fife	896	73	91	126	349	1,535
Lothian	892	91	93	103	340	1,519
Scottish Borders	1,382	128	173	225	603	2,511
South West:	**8,387**	**1,124**	**1,138**	**1,134**	**1,870**	**13,653**
East Central	976	133	151	130	139	1,529
Argyll & Bute	1,331	182	164	154	147	1,978
Clyde Valley	2,119	278	259	238	318	3,212
Ayrshire	1,698	236	237	220	436	2,827
Dumfries & Galloway	2,263	295	327	392	830	4,107
Scotland	**36,910**	**3,201**	**3,121**	**3,266**	**5,779**	**52,277**

(1) Standard Outputs represent the estimated farm-gate worth (£s) of crops and animals without taking account of the costs incurred in production.
c data suppressed to prevent disclosure of individual holdings.
< less than.

Table C25 Number of holdings, total and average from Standard Outputs[1], total and average Standard Labour Requirement[2] by region and sub-region, June 2014

		Standard Outputs (£)		Standard Labour Requirements	
	Holdings	Total from SO	Total from SO (average £ per holding)	Total SLR	Average SLR per holding
North West:	**20,533**	**167,186,211**	**8,142**	**6,664**	**0.325**
Shetland	1,818	11,689,650	6,430	747	0.411
Orkney	1,984	34,624,671	17,452	919	0.463
Eileanan an Iar	6,420	9,322,335	1,452	446	0.070
Highland	10,311	111,549,555	10,819	4,552	0.441
North East:	**8,858**	**372,503,067**	**42,053**	**7,532**	**0.850**
Grampian	8,858	372,503,067	42,053	7,532	0.850
South East:	**9,233**	**800,440,607**	**86,693**	**17,389**	**1.883**
Tayside	3,668	388,860,585	106,014	8,443	2.302
Fife	1,535	131,257,275	85,510	2,269	1.478
Lothian	1,519	101,605,729	66,890	1,920	1.264
Scottish Borders	2,511	178,717,018	71,174	4,757	1.895
South West:	**13,653**	**573,487,659**	**42,005**	**15,104**	**1.106**
East Central	1,529	44,102,152	28,844	1,295	0.847
Argyll & Bute	1,978	44,153,570	22,322	1,807	0.913
Clyde Valley	3,212	92,691,993	28,858	2,559	0.797
Ayrshire	2,827	127,417,151	45,072	3,099	1.096
Dumfries & Galloway	4,107	265,122,792	64,554	6,344	1.545
Scotland	**52,277**	**1,913,617,544**	**36,605**	**46,689**	**0.893**

(1) Standard Outputs (SO) represent the estimated farm-gate worth (£s) of crops and animals without taking account of the costs incurred in production.
(2) Standard Labour Requirements represent the estimated full-time equivalent (FTE) labour required to farm the crops and animals on the holding
1 Standard Labour Requirement (FTE) = 1900 hours per year.
N.B. Individual values may not sum to the total due to rounding.

Table C26 Number of holdings by Standard Labour Requirements[1] and farm type[2], June 2014

Farm type	Standard Labour Requirements					Total
	Very small (<1 FTE)	Small (1 to <2 FTE)	Medium (2 to <3 FTE)	Large (3 to <5 FTE)	Very large (5 or more FTE)	
	Holdings	Holdings	Holdings	Holdings	Holdings	
Specialist cereals	1,936	417	171	119	51	2,694
General cropping	423	226	147	146	122	1,064
Specialist horticulture & permanent crops	447	34	12	18	106	617
Specialist pigs	236	10	9	7	35	297
Specialist poultry	787	25	34	52	31	929
Specialist dairy	30	59	128	306	363	886
LFA cattle and sheep	9,609	1,699	1,002	1,032	985	14,327
Non-LFA cattle and sheep	1,774	240	103	99	71	2,287
Mixed holdings	4,142	542	290	303	221	5,498
General cropping; forage	21,519	240	146	200	205	22,310
Unclassified	1,323	12	12	14	7	1,368
Total	**42,226**	**3,504**	**2,054**	**2,296**	**2,197**	**52,277**

(1) Standard Labour Requirements represent the estimated full-time equivalent (FTE) labour required to farm the crops and animals on the holding
1 Standard Labour Requirement (FTE) = 1900 hours per year

(2) The 2015 ERSA uses a farm typology first used for the 2013 June Census. Comparisons with previous years should be made with caution. Further details are available at: www.gov.scot/Publications/2013/06/5219/12

< less than.

Table C27 Number of tractors, and other machinery, on main holdings December 2004-2014[1]

Number

Machinery type	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Tracked tractors	251	315	379	465	759	654	803	604	579	706	561
Wheeled tractors	43,874	42,614	42,827	41,985	42,173	41,997	42,190	40,224	40,683	40,008	39,672
Transport[2] [5]	19,278	20,902	21,509	22,221	21,758	23,246	22,967	24,278	23,802	24,197	27,687
Harrows and other cultivators[3] [6]	:	24,692	:	23,712	:	23,253	:	22,080	:	21,049	:
Sowing[3] [7]	:	8,728	:	7,855	:	7,803	:	7,386	:	6,753	:
Mowers, rakes, and potato harvesters[3] [8]	:	31,619	:	30,580	:	29,241	:	28,660	:	26,378	:
Load handling[3] [9]	:	51,625	:	50,771	:	50,966	:	51,225	:	49,405	:
Mounted hedge cutters[3]	:	1,192	:	833	:	843	:	910	:	1,068	:
Cattle weighing crushes[3]	:	2,604	:	2,442	:	2,315	:	2,491	:	2,271	:
Ploughs and rollers[4]	28,564	:	26,461	:	24,325	:	24,047	:	23,441	:	21,848
Fertilization[4] [10]	24,560	:	23,862	:	22,112	:	21,873	:	21,184	:	20,005
Forage and combine harvesters[4] [11]	22,385	:	20,316	:	19,116	:	18,777	:	18,089	:	17,110
Drying and storage[4] [12]	5,252	:	4,793	:	4,684	:	4,365	:	4,142	:	3,882
Miscellaneous[4] [13]	26,320	:	25,419	:	23,640	:	23,332	:	22,494	:	20,153

(1) Excludes minor holdings.
(2) Question was asked slightly differently in odd and even years, reducing comparability. Question was standardised in 2014.
(3) Data only collected in odd years.
(4) Data only collected in even years.
(5) Includes land rovers, lorries, vans, pick-ups, and all-terrain vehicles.
(6) Includes stone separators, harrows, hoes, rotary diggers, and other mounted or trailed cultivators.
(7) Includes seed drills, seedling transplanters, and potato planters.
(8) Includes mowers, mower conditioners, tedders, turners, siderakes, buckrakes, potato harvesters, and potato graders.
(9) Includes fork lift trucks, general purpose tractor trailers, wheeled automatic bale accumulators and packers, and linkage or loader attachments for bale handling.
(10) Includes mechanical dung spreaders, slurry and effluent tankers, and fertilizer distributors.
(11) Includes forage harvesters, combine harvesters, turnip and forage root harvesters, and balers.
(12) Includes grain driers, and mobile engine driven fans.
(13) Includes feed mills, feed mixers, field crop/fruit sprayers, drainage equipment, stand-by generators, general purpose elevators, moveable augers, and pneumatic conveyors.
: Information not available.

Table C28 Area of agricultural land rented, in million hectares, 2004-2014

	Lease of one year or more	Seasonal let
2004	1.65	:
2005	1.61	0.52
2006	1.63	0.53
2007	1.62	0.56
2008	1.59	0.58
2009	1.54	0.65
2010	1.48	0.69
2011	1.45	0.71
2012	1.38	0.77
2013	1.37	0.80
2014	1.33	0.77

: Information not available.

Annex A

Alternative Sources of Data on Sheep

RESAS has an on-going commitment to reduce the survey burden on our data providers, as well as to improve the data we use in modelling the industry. In June 2013, and in all subsequent collections, we have used cattle data obtained from the British Cattle Movement Service. This meant we could remove two large sections of data from our June and December forms. We have also used this source to obtain data relating to exports, imports, birth and deaths, used in Total Income from Farming calculations.

We are now investigating the use of administrative data relating particularly to sheep, and to a lesser extent pigs. These will come from two related sources and are defined by Sheep and Goats (Records, Identification and Movement) (Scotland) Order 2009 legislation.

Annual Sheep and Goats Inventory

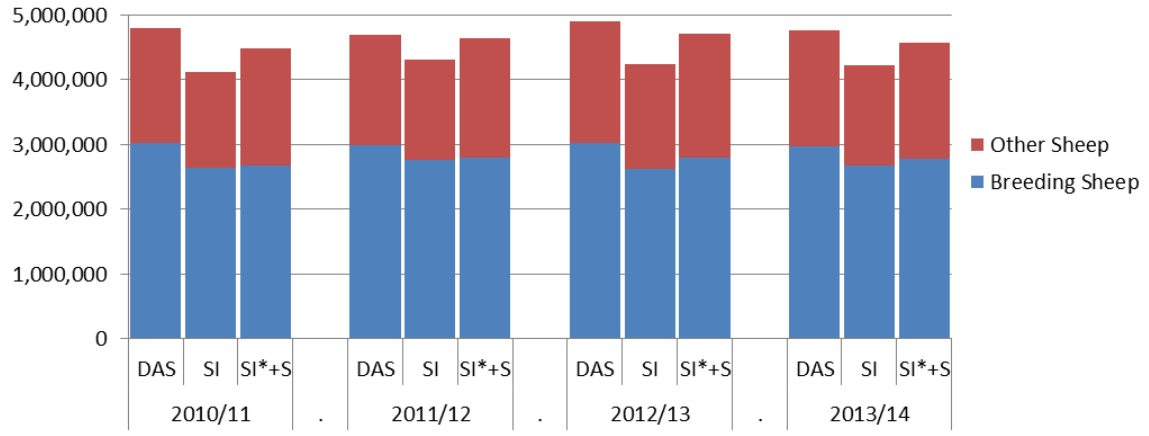
Each January the government carries out an annual inventory of sheep and goat numbers. This is a survey sent to all registered sheep-keepers, which collects the number of sheep and goats, by holding, in the following categories

i. breeding sheep and lambs put to the ram
ii. other sheep (including lambs and rams)
iii. goats

The collection has historically been run by DEFRA, with the Animal Health and Welfare Division of the Scottish Government being responsible for keeping the keepers list up-to-date for Scotland. It collects information at the start of January, and so is most comparable to the December Agricultural Survey collection. There is a statutory requirement on livestock keepers to return the information. The inventory is a full census and as such has a much wider coverage than the December Agricultural Survey (which is approximately a 50 per cent sample of the larger holdings only), and also achieves higher response rates. It therefore seems a suitable candidate for providing the information collected in the December Survey.

Data have been obtained for the last four years' inventories. These have been compared with the returns of the December Survey, the latter including estimates for holdings not included in the survey.

Estimated number of sheep in December



DAS=December Agricultural Survey, SI=Sheep Inventory, SI*+S=scaled up Inventory data plus December slaughter numbers

Initial comparison of the raw figures show a much lower figure for the inventory. However, two adjustments need to be made, firstly for non-response in the inventory, and secondly to account for the later survey date of the inventory. Scaling up the inventory numbers using the response rate and slaughter numbers for December gives data that are more comparable, though still lower than the December Survey, as shown in the chart.

There is however a requirement for greater detail of data at December than is currently collected in the Sheep Inventory. December sheep numbers are required by the European Union and also for the Total Income from Farming calculations, used as part of the National Accounts. The EU requires data in three categories

i. shearling ewes, gimmers and ewe lambs put to ram
ii. other ewes put to ram
iii. other sheep and lambs,

while the income calculations also require lambs, and gimmers and ewe lambs put to ram to be separately identified. This explains why the December Survey currently collects sheep data in nine categories.

It may therefore be possible to merge the two collections, with each keeper providing slightly more detail, but avoiding the duplication of those sampled in the December Survey providing sheep data twice, one month apart. Further analysis will be carried out during the summer to validate the comparability of the data. It is of advantage that there is a long time series of the inventory data available, which would allow us to backdate data in calculations such as those in Total Income from Farming (TIFF).

ScotEID Livestock movements system

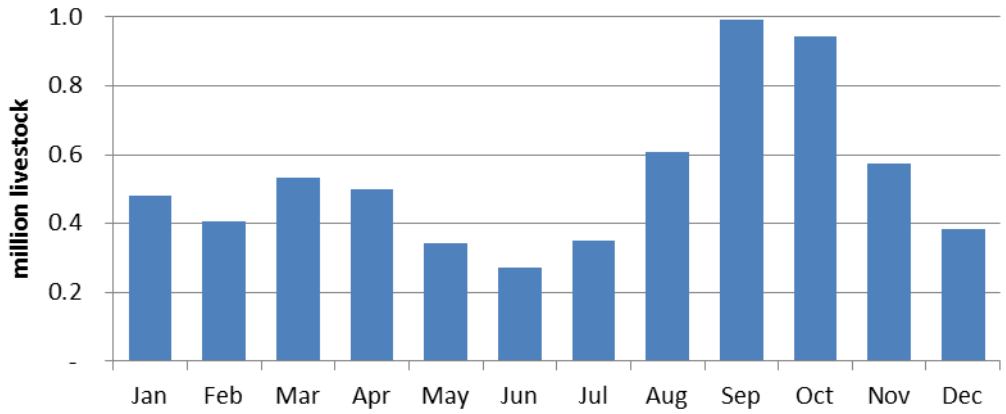
ScotEID is a livestock traceability movement database that was initially set up to comply with the EU Regulation for sheep and goat identification and traceability. All movements of sheep within Scotland, including animals moving to or from England and Wales, are recorded, movements can be recorded electronically directly to the database or via the paper movement document which is manually entered onto the system The database has been expanded to include pig movements and record the individual/herd test results for the Scottish industry led Bovine Viral Diarrhoea eradication programme.

Movements are recorded in batches/lot level of animals rather than at the individual animal level. However, where sheep move via a market or abattoir their identity is read electronically and this is recorded individually on the database. Hence for all movements a record would include the holding the sheep have moved from, the holding to which they have moved, the date of movement, and the number of livestock moved, but for about 70 per cent of movements individual level data is also available.

Full data are available for 2014, though they have yet to be fully analysed. The raw data suggest a total number of 325,000 movements involving 6.4 million sheep. It should be noted that in terms of these figures, many of the movements and sheep numbers will be, in a sense, duplicated. Sheep moved from one location, via a market, to a new location will be recorded as two movements. Further analysis of the data will be able to remove this double counting.

Higher movement numbers were seen in September and October, due to large numbers of lambs from upland areas and hills being sold because they are not ready for slaughter and need lowland pasture for feeding and finishing through the autumn and winter. Many breeding lambs will also be moved down to low ground for their first winter.

Number of livestock moved in 2014, by month



In total there were about two million livestock moved out of Scotland, and 180,000 moved into Scotland, resulting in a net outflow of 1.8 million (of all ages). Currently we model for 2014 (from comparing consecutive census numbers in different categories) a total output of 2.8 million sheep (2.3 million lambs, 570,000 older sheep), and have recorded 1.4 million slaughtered in Scotland (1.35 million lambs, 29,000 older sheep). This means a modelled total net outflow from Scotland of 1.5 million sheep. More validation work will be required however to confirm this higher than modelled net outflow of sheep.

Unfortunately from a data point of view, the movements system does not identify the age of the livestock that move farm-to-farm, so we are unable to differentiate between movements of lambs and older animals. This will mean that, for use in TIFF calculations, assumptions will need to be made to obtain this split, though the totals will now be able to be scaled to correct amount. However, age data is available for movements through markets or abattoirs which cover about 70 per cent of movements.

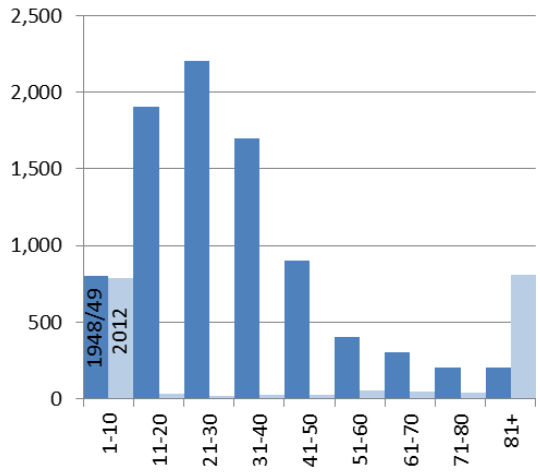
Milk production in 1949

> "Milk is the most important single product of Scottish agriculture. In 1948/49 the output of milk on Scottish farms was 215 million gallons, valued at £28 million; this represented 27 per cent of the total value of Scottish agricultural output."

So begins one of three short papers[17] on milk production, included in Scottish Agricultural Economics Volume II, published in August 1951. Nowadays milk is relatively less important; in 2014 milk was valued at £447 million (or about £13 million in 1949 prices), or 15 per cent of output. Milk production has however increased since then, with 294 million gallons produced in the 2013/14 quota year.

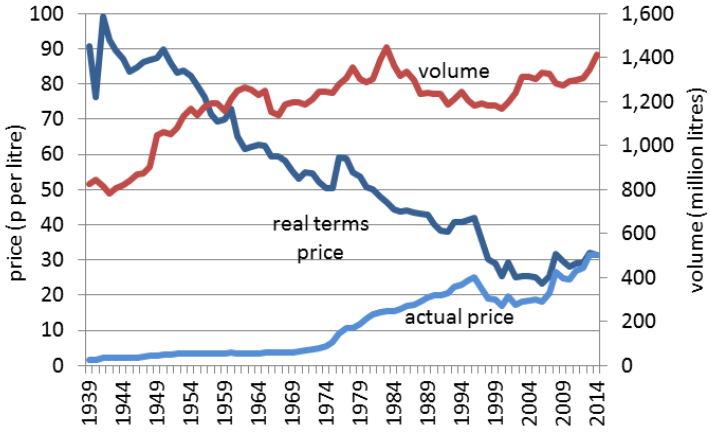
The three papers contain some other statistics that make a stark comparison with today. The data on dairy herd size includes any holding that has dairy cows and heifers in milk, or cows in calf. There were 8,600 such holdings, with an average number of 31 cows per holding, The paper notes that in England and Wales the average was only 15. The published table has '81 and over' as its largest category, obviously considering this large enough not to necessitate further divisions, with 200 holdings in that category.

Chart 1: Size of farms with dairy cattle



The most recent year for which we have comparable data definitions is 2012. There were by then only 1,840 such holdings, with an average of 92 head per holding, and with the top 200 holdings now being of size 217 or greater, rather than 80 plus. However, excluding the large number of holdings with just a few dairy cattle (actually a similar number to in 1948/49), nearly all the other holdings with dairy cattle in 2012 would be in the uppermost category of the 1948/49 table.

Chart 2: Price and volume of milk, 1939-2014



In the late 1940s yield per cow was around 700 gallons, a half of what it is nowadays, and milk prices were about 30d per gallon, which is 2.7p per litre, or, we estimate, about 88p per litre in today's prices.

That real terms price fell steadily until about 2007. The total volume produced, about

[17] . "The Trend of Milk Production Costs 1948/49 to 1949/50" by H. Shemilt, "Scotland's Milk Supplies" by O. Beilby and H. Shemilt, and "Maximum Returns and Milk Production" by F. Holme.

one billion litres, was increasing slowly until the 1960s, when it reached the 1.2 billion litres that was broadly still the norm until the last decade.

The first of the three papers in the report focuses on changes in the costs of milk production. The most important cost was feed, which accounted for over half of all costs. Feed costs increased 13 per cent between 1948/49 and 1949/50. This was due to the removal of part of the subsidy on feed in April 1949. The price of concentrates rose 40 per cent, pushing farmers to look elsewhere. While 1948 was a very wet year, with high hay and cereals prices, 1949 was an excellent year for both, helping farmers looking for an alternative. However, dairy farms actually bought more concentrates, pushing up yield, particularly in winter.

The following charts are not necessarily comparable, the first showing specific costs of milk production collected specifically for the report, whereas the second, from the Farm Accounts Survey, shows cost for dairy cow enterprises. However, it would appear that the cost of labour, and to a lesser extent feed, were more important in 1948/49, with a much smaller value of livestock purchased.

Chart 3: Milk production costs, 1948/49

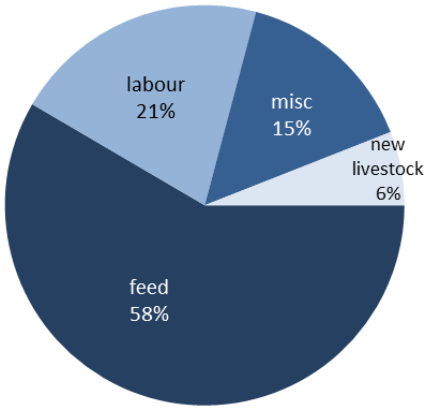
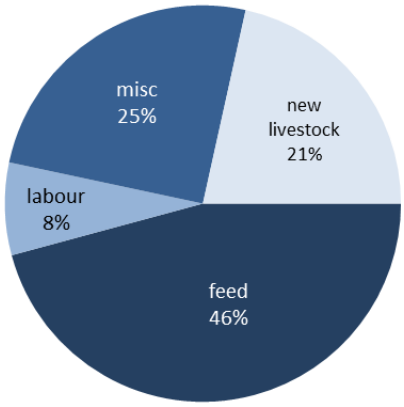
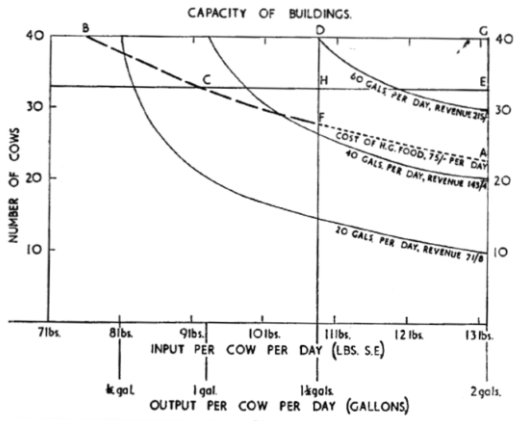


Chart 4: Dairy cow enterprise costs, 2013/14



The third paper on milk in the report addressed the farmer's problem of how to utilise home-grown foods and bought-in feed (whether rationed or not), balancing the two sources in a way that maximised his net returns. For the analysis "self-contained" herds and "the flying herd" were considered separately. The author accepts that "the particular results obtained have no universal validity… however, although conditions will vary between farms, the principle are generally applicable". Hence it was not meant to provide answers, or even a formula for you to plug in your local data, but more a guide as to how one might approach the question analytically, using the skilfully drawn diagram opposite.

Chart 5: Utilisation of feed resources on a dairy farm in relation to size of herd and yield per cow.



A large number of historical publications are available at www.gov.scot/Topics/Statistics/Browse/Agriculture-Fisheries/Publications/histagstats

Statistics at a glance - 2014

Land-use
Scotland: 7.88m ha
Agricultural land: 6.18m ha
Rough grazing: 3.64m ha
Grass: 1.31m ha
Crops: 577,000 ha
Fallow: 12,000 ha

Crops
Barley: 327,000 ha
Wheat: 109,000 ha
Oats: 25,000 ha
Oilseed: 37,000 ha
Potatoes: 29,000 ha
Stock-feed: 19,000 ha
Vegetables: 16,000 ha
Fruit (incl under cover): 1,750 ha

Labour
Total headcount: 66,000
Occupiers: 26,000
Spouses: 13,000
Full-time staff: 13,000
Part-time staff: 7,400
Casual and seasonal: 6,700

Tenancy
Area rented >1yr: 1.33m ha
Holdings renting land: 17,000
…excluding croft: 6,600
Holdings with 91 Act: 5,000
…with 91 Partnership: 530
…with SDLT: 830
...with LDT: 530
…with SLA: 150
Seasonal lets: 0.77m ha

Cattle
Total: 1.79m
Total dairy: 274,000
Dairy cows: 170,000
Total beef: 713,000
Beef cows: 437,000
Bulls: 279,000
Calves: 527,000

Sheep
Total: 6.69m
Ewes for breeding: 2.60m
Rams: 87,000
Other: 731,000
Lambs: 3.27m

Pigs
Total: 316,000
Breeding herd: 30,000
Gilts for breeding: 5,000
Boars: 920
Other: 280,000

Poultry
Total: 14.74m
Producing eggs: 5.71m
Breeding: 1.11m
Broilers: 7.80m
Turkeys: 12,000
Other poultry: 104,000

Other farm livestock
Deer: 7,000
Horses, work: 950
Horses, other: 36,000
Goats: 4,500
Camelids: 1,800

TIFF: £688m

Outputs: £3.05b
Cereals: £381m
Barley: £233m
Wheat: £131m
Potatoes : £170m
Vegetables: £131m
Fruit: £92m
Livestock: £1.14b
Cattle: £710m
Sheep: £215m
Pigs: £94m
Poultry: £100m
Milk: £447m
Eggs: £78m
Wool: £6m
Diversified activity: £85m

Subsidies
Total in TIFF: £511m
SFP: £382m
LFASS: £66m
Rural Priorities: £35m
Outwith TIFF: £23m

Cost estimates: £2.85b
Feed: £644m
Seed: £79m
Fertiliser: £169m
Maintenance: £93m
Fuel: £127m
Net Interest: £43m
Net Labour: £361m
Net Rent: £18m

Type	holdings	area	Standard Output	2013-14 FBI	% making < min. agric. wage
Cereal	2,694	260,800	161,582,200	23,259	46
General cropping	1,064	136,800	165,400,200	36,216	40
Horticulture	617	17,100	195,317,200	:	:
Pigs	297	10,900	34,524,000	:	:
Poultry	929	11,600	127,351,000	:	:
Dairy	886	129,900	287,578,600	79,651	24
Sheep & cattle LFA	14,327	3,164,700	442,915,100	25,634	47
Sheep & cattle non-LFA	2,287	88,000	70,148,500	24,181	48
Mixed	5,498	307,700	237,836,300	29,903	39
Forage	22,310	1,409,300	190,964,200	:	:
Other	1,368	59,200	0	:	:
Total	52,277	5,596,000	1,913,617,500	30,534	43

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